

2035 Investment Strategy

June 2025



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1 FOREWORD/INTRODUCTION

In 2016, Wake County voters approved a package of new taxes and fees dedicated to improving and expanding the public transit network in Wake County. This county-wide transit investment program – the Wake Transit Plan (WTP) – is designed to accomplish Four Big Moves:



Connect the Region



Connect All Wake County Communities



Connect Frequent, Reliable Urban Mobility



Enhance Access to Transit

In the nine years since voters approved the first Wake Transit Plan and the sales tax referendum, a lot has happened locally, regionally, and nationally, including the COVID-19 pandemic, changes in government spending priorities, and increasing growth and development in Wake County. The pandemic impacted implementation of the WTP because it disrupted the way many people travel as well as where, when, and how they commute to work. It led to changes in labor markets, including a national and regional shortage of bus operators.

Through these disruptions, Wake County demonstrated its resiliency as a community and as part of the greater triangle region. The region continues to grow; Wake County remains one of the fastest growing urban areas of its size in the United States. In 2024, the U.S. Census department estimated Wake County's population as 1.2 million, nearly 20% higher than in

2016 when the Wake Transit Plan was adopted. Sustained growth has meant the Wake Transit Plan revenue has met or exceeded forecasts each year since its inception. However, growth also comes with tradeoffs: high inflation and rising housing costs mean it is more expensive than ever to live in Wake County. Traffic congestion has also returned, even with some workers continuing to work from home part- or full-time.

Wake Transit investments are an essential part of the regional transportation planning efforts for all 12 Wake County communities. Community members played a key role in the Wake Transit Plan (WTP) update process by reviewing and confirming the investment priorities that resulted in a recommended 10-Year Investment strategy. As of 2025, **forecasts prepared by the Wake Transit Plan show there will be approximately \$3.3 billion in revenue available for transit network improvement and expansion between 2026 and 2035.** The revenue assumption includes funds directly raised by the voter-approved sales tax, a portion of the regional vehicle rental car tax revenue and increases in vehicle registration fees, as well as state and federal grant funds dedicated to specific WTP projects, plus roughly \$800 million in bond proceeds.

RECOMMENDATIONS SUMMARY

The 2035 Wake Transit Plan lays out a 10-year investment strategy that outlines how \$3.3 billion in transit funding will be spent between FY 2026 and FY 2035. Subsequent chapters of this report include more information on individual projects and programs included in the plan. Highlights of the investment strategy include:

- \$1.8 billion of the proposed spending will fund ongoing projects and operations with roughly half associated with operating expenses and just under half programmed towards capital projects.
 - An estimated \$941 million will be used to fund ongoing transit plan administration and management and support existing operating projects. These projects include fixed-route bus services and the Community Funding Area (CFA) Program.
 - \$831 million will be used for capital projects, such as vehicle acquisition, developing Bus Rapid Transit (BRT) corridors, building bus maintenance facilities, and improving passenger facilities, including transit centers, bus stops and park and ride lots.
- \$1.1 billion is expected to be spent on new projects and services that have not been included in the previously adopted Wake Transit Plan or annual Work Plans.
 - New and expanded transit services will utilize about \$166 million of this budget.
 - Capital projects anticipated to be funded in the next 10 years will utilize about \$954 million and will be directed to regional rail investments, developing new

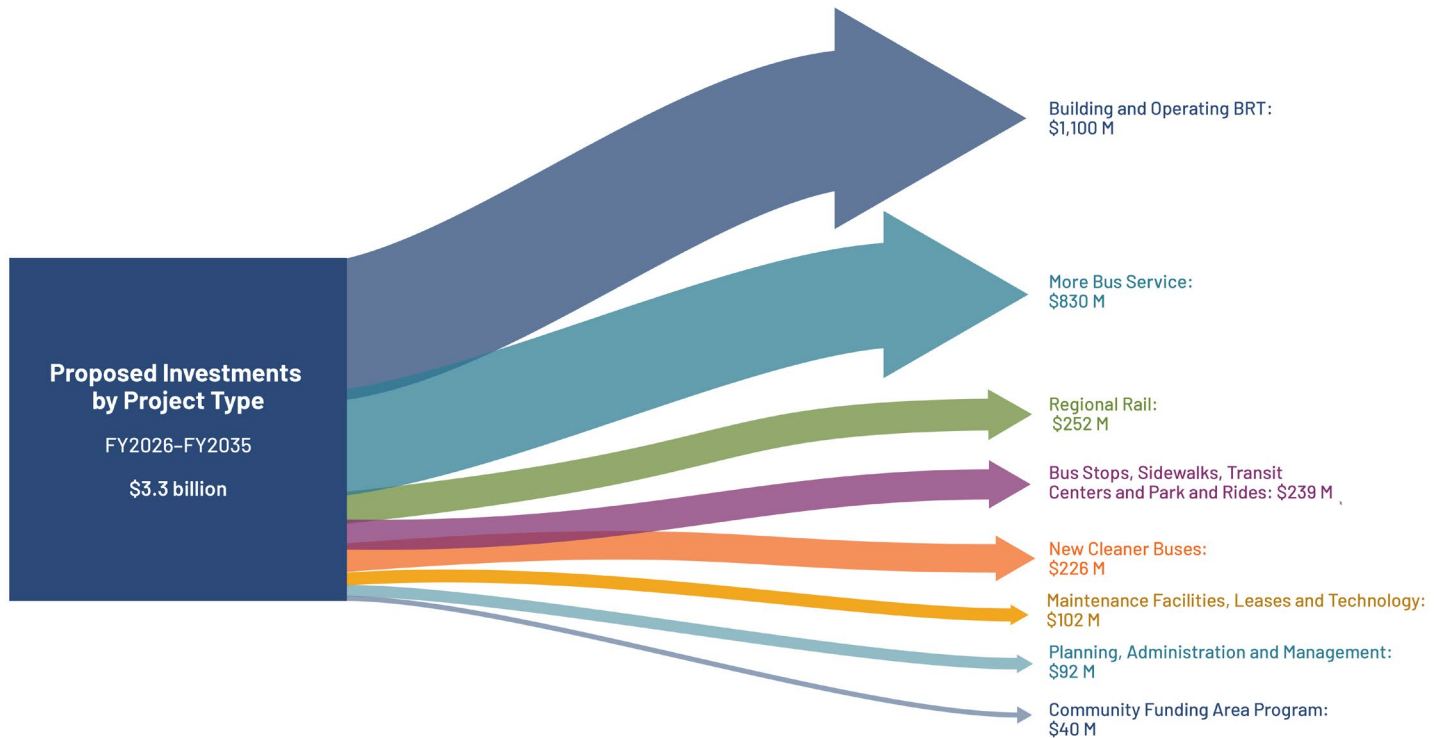
BRT corridors, buying, and repowering vehicles, and improving passenger access to services and comfort at transit facilities.

- \$429 million will be used to pay back borrowed funds (bonds) and other debt service. A portion of these funds are also being held as “reserve” to ensure that we meet federal set aside requirements and have some ability to respond to unforeseen situations.

The 2035 Wake Transit Plan adds a handful of major investment projects and focuses on finishing projects already started. It takes a major project out of the plan – at least for the foreseeable future – by pivoting away from commuter rail and instead utilizing WTP funds to help leverage and expedite planned investments in the regional rail network, including projects advanced by the North Carolina Department of Transportation (NCDOT). This pivot reflects study results (funded through the WTP) that show commuter rail service, as initially envisioned, is neither financially feasible nor practical. Instead, the Wake Transit Plan will invest in strengthening existing rail services and planned projects, like the S-Line, and will explore alternative travel options like a BRT service on I-40 to better connect downtown Raleigh to Research Triangle Park.

The 2035 WTP is described in more detail in subsequent chapters of this document. A summary of where and how the funds are allocated by type of project is shown in Figure 1.

Figure 1 2025 Wake Transit Plan FY2026-2035 10-Year Investment Strategy¹



REPORT ORGANIZATION

This plan is divided into the following chapters following this introductory section:

- **Chapter 2: Recommendations** – summarizes the Wake Transit Plan projects, programs and services recommended for implementation between FY26 and FY35.
- **Chapter 3: Developing the 2035 Wake Transit Plan** – describes the foundational information, including stakeholder and community input used to develop the 10-year investment strategy.
- **Chapter 4: Trade-offs, Outcomes and Policies** – highlights the trade-offs between investment decisions with expected outcomes and policy changes.
- **Chapter 5: Financial Plan** – discusses the implementation and funding strategy through FY 2035.
- **Chapter 6: Outcomes: Measuring and Tracking Success** – estimates benefit from implementing the plan and updates the targets for success.

¹ Revenue and investment assumptions for FY2026-2035 were compiled in June 2025.

2 RECOMMENDATIONS

INTRODUCTION

The 2035 Wake Transit Plan lays out a recommended 10-year investment strategy that reflects community and stakeholder goals and priorities and was developed based on extensive outreach, education, and input on key trade-offs of different investment scenarios. The investment strategy allocates \$3.3 billion in forecasted transit funding (FY2026-FY2035) to existing projects and services, new projects and services, and debt service.





- **\$1.8 billion will be spent on projects and services that were already committed to** as part of previous Wake Transit planning documents.
- **\$1.1 billion will be spent on new projects and services** that have not been included in previous Wake Transit Plans or annual work plans.
- **\$429 million will be used to pay back borrowed funds (bonds) and other debt service.** A portion of these funds are also being held in reserve.

Investments in existing projects and services account for most of the forecasted funding – in doing so, this plan update aims to deliver on the projects and services promised in the first two iterations of the plan, including better regional connectivity, more frequent, reliable service, and expanding programs that have had significant impact, such as the Community Funding Area (CFA) Program.

BIG MOVES: ENHANCED TRANSIT IN, TO AND THROUGH WAKE COUNTY

The 2035 Wake Transit Plan (“2035 Plan” or “the Plan”) was developed by identifying specific transit projects, programs and services that strengthen the region’s transit network and diversify travel choices for people traveling to and through Wake County. The Plan is centered around four Big Moves – the foundational goals that guide Wake Transit Plan (WTP) investments (see Figure 2). The next four sections describe individual projects and services included in the 2035 Plan using the Four Big Moves framework. The following sections also highlight recommended changes between the last Plan and this 2035 Plan.

Figure 2 2035 WTP: Summary of Planned Investments by Big Move

Big Move	Proposed 2035 Investments
Connect the Region 	<ul style="list-style-type: none"> Invest in the rail network through partnering with NCDOT and other agencies to expand passenger rail projects. Establish BRT services with connections from Cary to RTP and Garner to Clayton. Plan and design a BRT service on I-40 that will connect Raleigh with RTP.
Connect all Wake County Communities 	<ul style="list-style-type: none"> Expand local and regional transit options to provide all day service. Connecting every town to Cary, Raleigh and/or RTP. Expand local bus services so towns are connected to each other. Build at least 5 new community transportation hubs.
Create Frequent Reliable Urban Mobility 	<ul style="list-style-type: none"> Expand the frequent bus network by offering more evening and weekend 15-minute service. Add at least one new bus route to the frequent bus network each year.
Enhance Access to Transit 	<ul style="list-style-type: none"> Invest up to \$3 million a year to improve bus stops, transit facilities, sidewalks, and crosswalks. Triple the size of the Community Funding Area program to invest more in individual communities.

Source: Nelson\Nygaard Consulting Associates



Big Move: Connect the Region

The Wake Transit Plan will continue to strengthen cross-county connections that make it easy to travel within Wake County and throughout the Triangle Region. The Plan will invest in regional service by implementing and expanding the Bus Rapid Transit (BRT) network and by setting aside a "rail-ready" fund to support state and federal regional rail projects. Major regional connections that would be available to travelers by 2035 are shown in Figure 3.

Bus Rapid Transit

The 2035 WTP uses a combination of rail and Bus Rapid Transit (BRT) investments to provide frequent, high-capacity connections between major destinations in Wake County and neighboring counties (Durham and Johnson). Regional BRT planned to be operational by 2035 includes:

- Two Wake BRT extensions: Southern Corridor extension connecting Garner to Clayton in Johnston County and a Western Corridor extension from Cary to Research Triangle Park, which straddles Wake and Durham Counties.
- A new I-40 BRT service providing a direct connection between downtown Raleigh and Research Triangle Park via the Lenovo Center and Raleigh-Durham International Airport (RDU).

Investments in BRT services include corridor treatments, increases in service levels and passenger connection facilities, such as park and ride lots and community transportation hubs. A major investment study (MIS) is funded to plan and design the proposed I-40 and an additional potential Harrison BRT² service. Part of the scope of the study will be to consider the feasibility of related investments, for example, \$50 million has been set aside to build an airport transfer facility near the I-40/BRT corridor. If deemed feasible, the cost estimate will be adjusted, and initial design elements would be a finding of the MIS.

Regional Rail Investments

The 2035 WTP will also invest in the region's rail network, by working with partners and leveraging other funding sources to add service, support expansion and improve connections to the regional rail network. The Plan will designate \$250 million over the next 10 years to support regional rail investment opportunities within Wake County through investments like new train stations, track improvements, and funding more trips on existing services.

This is a major shift from the Commuter Rail project envisioned in the original 2016 Wake Transit Plan and continued in the 2030 Plan. The 2035 Plan recommends the postponement of commuter rail service planning from Durham to Garner due to financial and technical feasibility study findings. Instead, funds have been redirected to support investments in BRT and contribute to federal and state regional rail projects. This change was determined to accomplish the regional connectivity goals in a way that is more efficient and expedient. The shift in focus was supported by stakeholders and community members throughout the plan development process.

² A potential Harrison-Kildaire Farms BRT service would connect the I-40 corridor (and potential BRT route) with downtown Cary traveling on Harrison Boulevard, connecting south to US-64 traveling on Kildaire Farms.

BIG MOVE: CONNECT THE REGION

Key Projects:

- BRT on I-40 to connect Raleigh with RTP and RDU
- BRT extensions connecting Garner and Clayton and Cary and RTP with 30-minute express service
- Investment in existing and planned regional rail service

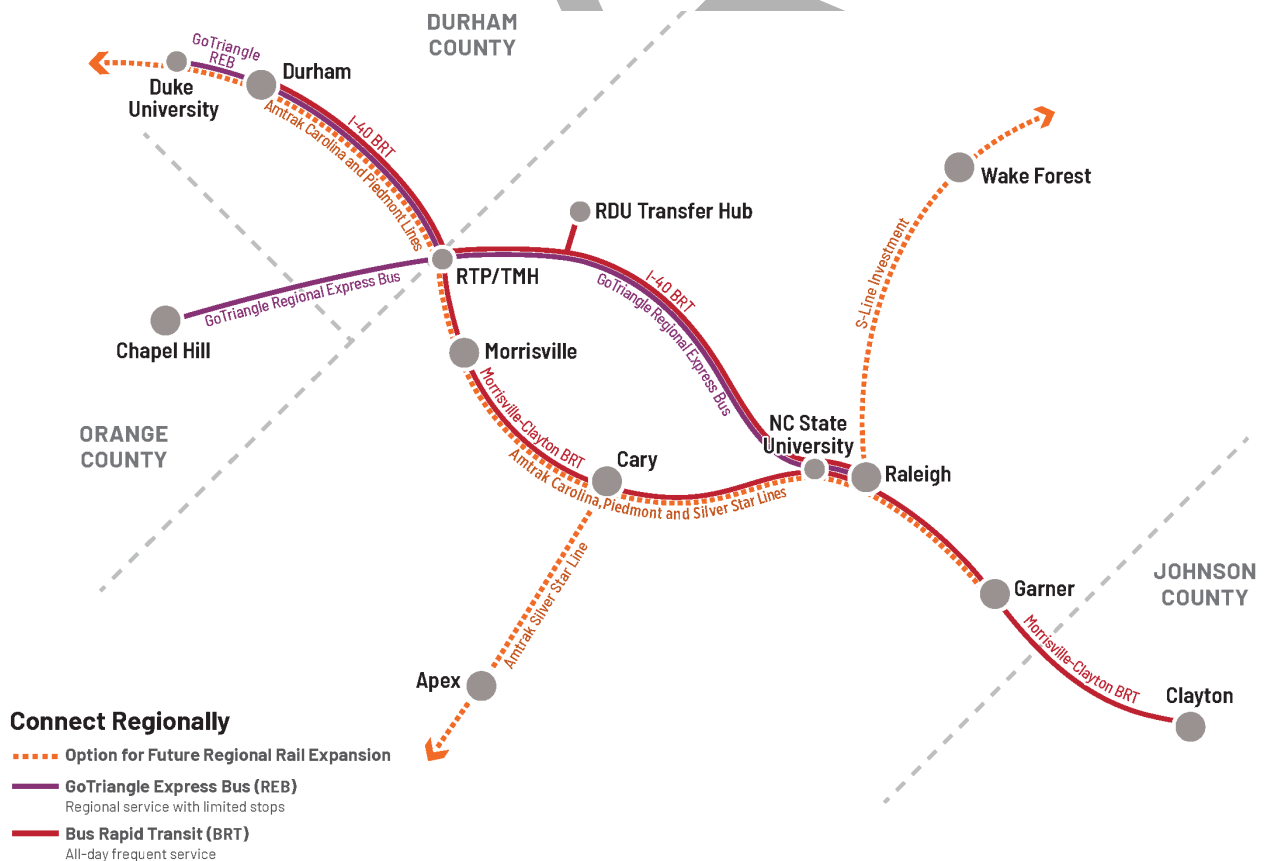
Transit Plan Updates:

- Network of community transportation hubs.
- Commuter rail from Durham to Garner has been postponed in favor of investments in other regional rail services

Key Benefits:

- BRT and express bus services connect Wake County communities with regional destinations with all day service every day
- Regional BRT services advance WTP connectivity goal faster and cheaper than commuter rail
- Coordinated, cost-efficient investments in state/federal regional rail projects

Figure 3 2035 Proposed Regional Network





Big Move: Connect All Wake County Communities

Connecting all 12 communities in Wake County is a core goal of the Wake Transit Plan (WTP). In the first two versions of the Wake Transit Plan, this goal focused on connecting all communities to the Raleigh/Cary fixed-route transit system. In the 2035 Plan, this goal has been expanded so each community will connect with an all-day transit service to create access to jobs and services and enhanced transit access countywide. The 2035 Plan advances the Connect All Wake County Communities Big Move by:

- Increasing the hours and days of existing bus services and adding new regional connections working towards a network that connects communities to major activity hubs and the expanded high-capacity network.
- Investing in up to five new community transportation hubs that will serve as local connection points for transit and other transportation services. The design, scale and amenities included in each hub will be determined through study and planning coordinated with individual communities.
- Creating a new peak-only service to connect the downtown Raleigh transit center and the Amazon facility in Garner.

While projects prioritized for implementation are identified in the 2035 Wake Transit Plan (see Figure 4), the implementation schedule of specific investments (i.e., which route gets added first) was not determined in this plan; these decisions will be determined through the 2026-2027 Wake Bus Plan update process.

BIG MOVE: CONNECT ALL WAKE COUNTY COMMUNITIES

Key Projects:

- All 12 communities will be connected to GoCary, GoRaleigh and GoTriangle's fixed-route transit network
- Town-to-town connections will be established where feasible and needed
- All day local service options will be enhanced with weekday service (span/frequency upgrades) and new weekend service added on existing crosstown routes where feasible.
- Development of up to 5 new community transportation hubs.

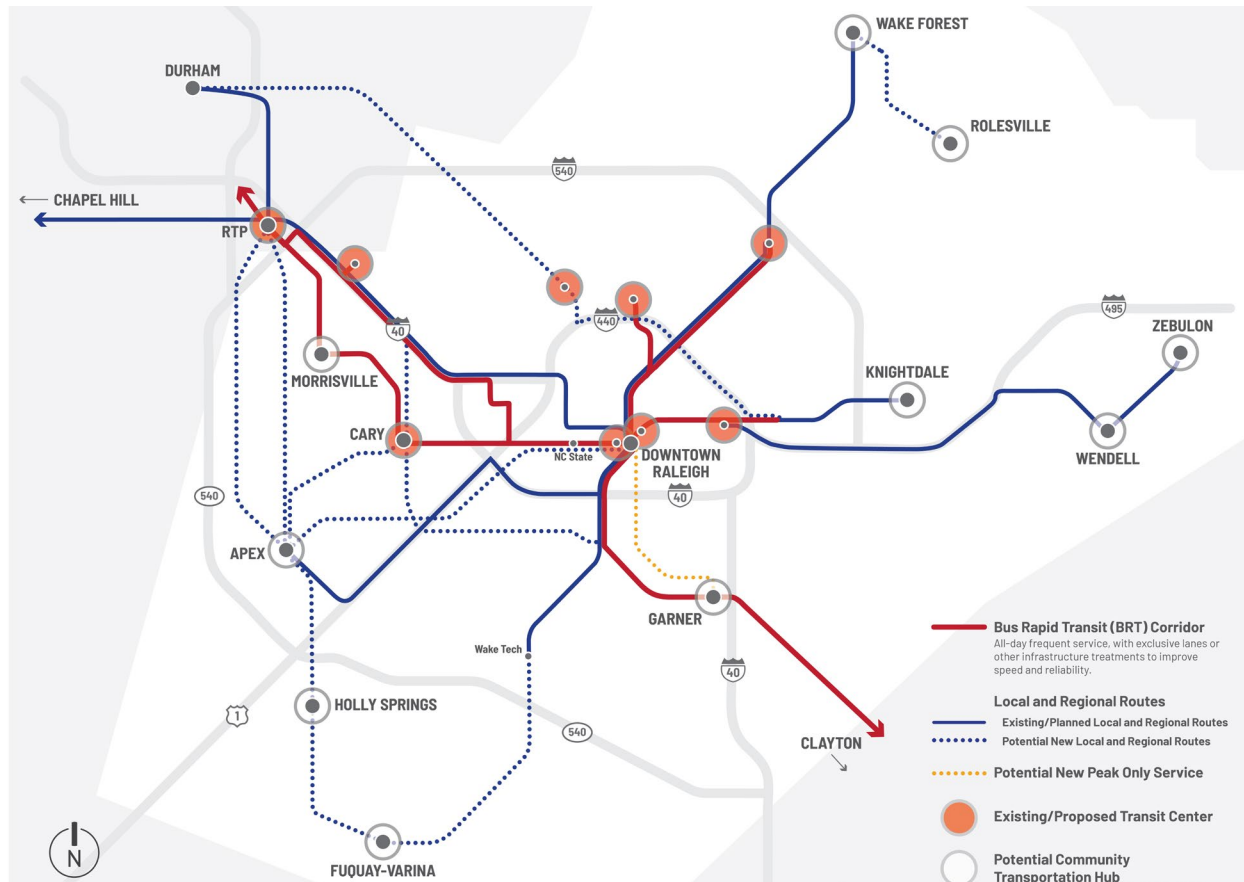
Transit Plan Updates:

- As many regional/local routes as possible will operate all day, every day by 2035—some routes may have weekday-only service depending on funding constraints
- More local, all-day transit service established, including those funded through the CFA Program
- Some existing routes will be replaced by more effective and efficient services

Key Benefits:

- Local connections – faster and more reliable connections within and between individual communities.
- Regional connections – more connections between individual communities and locations throughout the county and region.
- More community transit facilities – new community transportation hubs - will provide a central location for travelers and community members to identify and access Wake County's transit network.

Figure 4 2035 Proposed Local and Regional Bus Routes



Big Move: Frequent, Reliable Urban Mobility

A major goal of the Wake Transit Plan is to connect as many people and jobs as possible to frequent, reliable transit service. The 2035 Wake Transit Plan (WTP) prioritizes continued investment in the fixed-route frequent bus and BRT network – service that runs every 15 minutes or better all day – with a focus on routes in Raleigh and Cary that will serve the most people. The 2035 WTP advances the Frequent, Reliable Urban Mobility Big Move by:

- Completing the four core Bus Rapid Transit (BRT) corridors – New Bern, Southern, Western and Northern. The 2035 Wake Transit Plan expands on these four corridors by including funding for two Northern BRT branches, one which connects to North Hills and another that connects Triangle Town Center. The Plan assumes that both extensions will be operational by 2035 (see Figure 5).

- Planning for the next generation of BRT corridors, including upgrading high ridership bus routes, like Glenwood, and investing in corridors that provide key connections between other WTP investments. In total, the 2035 WTP invests roughly \$1.0 billion in the completion of planned BRT corridors and the study, design, and implementation of Wake County's next generation BRT services.
- Investing in current routes to elevate them to the frequent, all-day level of service as well as creating new routes that meet these standards. Although the specific implementation dates for individual routes are not determined in this plan, the investment strategy includes upgrading bus routes to meet the frequent network, creating over 200 new miles of additional frequent service. In addition, the WTP plans to invest in frequent service so more routes will meet the standard of running 15 minutes or better for 12 hours a day on weekdays.

THE WAKE TRANSIT PLAN 2035 SERVICE STANDARDS

All day service is defined as a transit route that operates at least 16 hours per day on weekdays and Saturdays and 12 hours on Sundays.

Frequent fixed-route service frequent bus service is defined as a bus route that arrives at a bus stop every 15 minutes (or more frequently). Frequent bus routes operate at least 18 hours on weekdays and Saturdays (17 hours on Sundays) with frequent service available for at least 12 hours a day on weekdays.

Expanding the frequent transit network is one of the most impactful investments made by the Wake Transit Plan. It is also one of the most expensive. The benefits of frequent bus service include strong ridership, which has been resilient. During the COVID pandemic ridership on frequent bus routes dipped less dramatically and was the quickest to rebound. In total, by 2035 the WTP expects over 200 new miles of additional frequent service including 65 miles of core BRT service.

BIG MOVE: FREQUENT, RELIABLE, URBAN MOBILITY

Key Projects:

- Increase the number of bus routes that meet the frequent bus route standard.
- Ensure that all frequent routes meet the standard of operating for 15 hours a day or more, every day of the week. Ensure that all frequent routes meet the standard of operating for 18 hours a day on weekdays and Saturdays and for 17 hours on Sundays.
- Increase frequent bus network from 109 miles to 304 miles including 65 miles of BRT service. Depending on implementation schedules, frequent bus service could increase to 529 miles (all numbers reflect bidirectional service).
- Improve and/or build at least 10 connection points where bus routes meet

Transit Plan Updates:

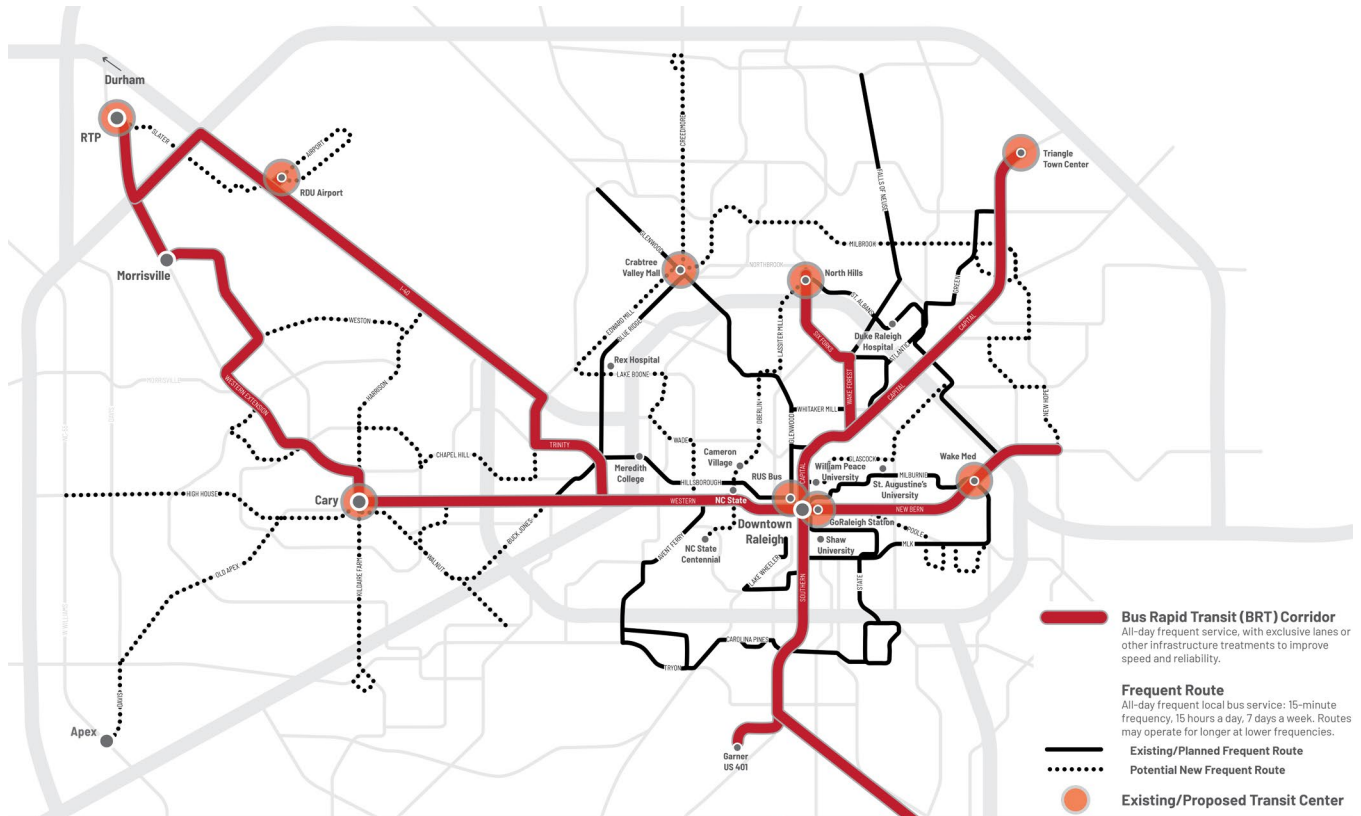
- First 10 years expanded frequent service miles from 17 to 109 miles, next 10 years adds another 200 miles

Key Benefits:

- Provide faster, more reliable, more convenient bus service accessible to more people and more key destinations
- Increase ridership
- Support increased and more dense development

DRY

Figure 5 2035 Proposed Frequent Bus Network



Big Move: Enhanced Access to Transit

Enhancing access to transit and making it safer and more comfortable to use transit is a fundamental goal of the Wake Transit Plan. It was frequently cited as a priority in surveys conducted as part of the 2035 Wake Transit Plan (WTP) update process and one of the major objectives of the 10-year investment strategy. The 2035 WTP will enhance access to transit in several ways:

- Increasing investment in transit service across the county, including fixed-route bus services, but also locally oriented services like microtransit.
- Investing in sidewalk and crosswalk connections to transit facilities
- Continuing to build and strengthen passenger facilities, with more amenities like benches, lighting and information at bus stops as well as more comfortable and

accessible facilities like community multimodal transportation hubs, connection points and transit centers where bus routes connect.

- Expanding the Community Funding Area Program by increasing the total amount of funding available through the program.
- Making it easier for communities to access CFA Program funds through reduced local match requirements and a larger pot of funding for transit investment.

Several investments supporting this big move are underway and/or are expected to receive funding in FY 2026. This includes continued funding for CFA Program projects, systemwide bus stop improvements, development of several transfer points and transit centers including the Downtown Cary Multimodal Center and the Triangle Mobility Hub in Research Triangle Park. Other projects like new community multimodal transportation hubs, additional park, and ride lots and new connection points to support new services will be identified and scheduled over the next 10-year period.

BIG MOVE: ENHANCED ACCESS TO TRANSIT

Key Projects:

- Invest up to \$3 million a year to improve bus stops, sidewalks, and crosswalks
- Triple the amount of funding available through the Community Funding Area (CFA) Program and reduce the local match requirement from 50% to 35%
- Build new and improve transit centers, connection points and community transportation hubs

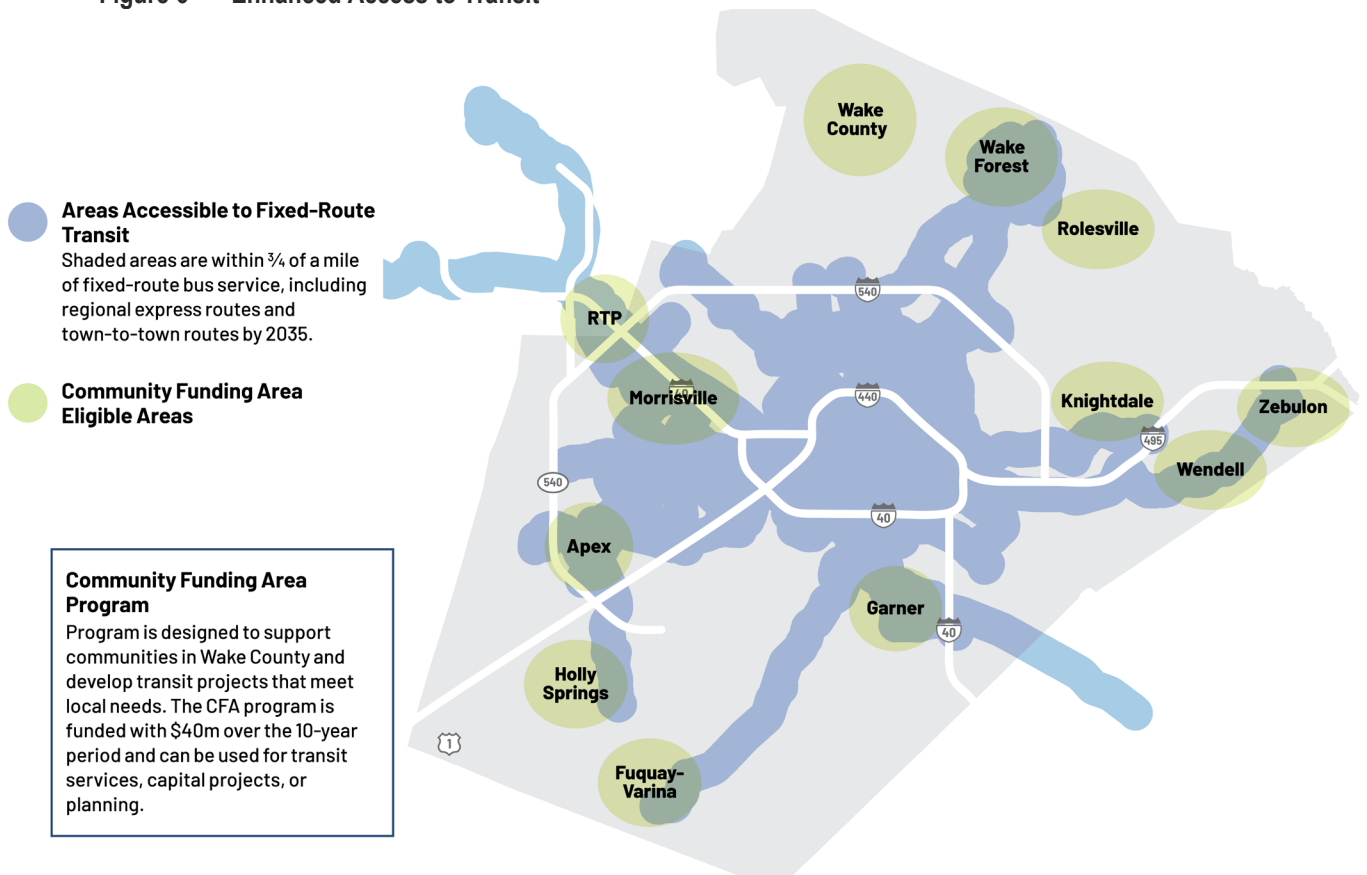
Transit Plan Updates:

- Where feasible and practical, bus stops for all providers in Wake County will be ADA compliant by 2035
- As of 2025, the CFA Program has funded 15 local transit projects with \$6.4 million provided to eligible partners. \$60 million is being set aside for operations and capital projects through FY 2035

Key Benefits:

- More accessible and comfortable bus stops and transit facilities
- Improved walking and bicycling access to transit facilities
- Expand opportunities for Wake County communities to operate transit services designed to meet their local needs

Figure 6 Enhanced Access to Transit



3 DEVELOPING THE 2035 WAKE TRANSIT PLAN

BACKGROUND

The original Wake County Transit Plan covered a financially constrained period of ten fiscal years from 2018 through 2027. CAMPO regularly updates the Wake Transit Plan every four years to extend the plan's investment horizon, refine assumptions for financial conditions, review the project delivery schedule, assess plan goals, set investment priorities, and identify future investments in light of financial capacity and community priorities. The Wake Transit Plan was updated in 2021 to extend the planning horizon three years to FY 2030. The 2035 Wake Transit Plan reflects the second update and extends the planning horizon out an additional five years from FY 2026 to 2035.

TRANSIT MARKETS AND NEEDS

The 2035 WTP includes a transit market analysis to evaluate changes in the demand and need for transit; it also takes a closer look at growth and development in Wake County communities. The market analysis shows that, while Wake County continues to add people and jobs at a fast pace, suburban towns in Wake County have grown especially fast since the original 2016 plan was adopted, warranting a closer look into the changing need and opportunity for transit services in different parts of the county. The market analysis conducted for this plan builds off the Wake Bus Plan, which was adopted in 2023.

Findings from the market analysis helped determine where to focus bus-related transit investments by comparing where current and potential transit riders live, work, and travel to, with available transit access. This includes looking at density, travel patterns, and other factors throughout the region, and where different types of transit would be supported. This section will focus on changes and opportunities in the transit market since the 2030 Wake Transit Plan. The complete market analysis for the 2035 Wake Transit Plan can be found in Appendix A.

Current and Future Transit Demand

While total population and employment density are crucial to understanding transit demand, analyzing who is taking transit and what types of jobs are in an area allows for a more comprehensive look at the level of service needed. The Plan development team conducted a Transit Demand Analysis using a combination of factors – including population density, employment density, socioeconomic characteristics, and job types – to create a Composite

Demand Index for the region. This analysis indicates where demand for transit is the greatest and where to focus transit investments. Additional details on transit demand analysis methodology can be found in Appendix A.

Current (2020) and projected future (2040) composite demand, mapped in Figure 7 and Figure 8 respectively, were compared as part of this analysis. The two maps show how levels of demand for transit service are expected to change geographically between 2020 and 2040. Additionally, Figure 9, Figure 10, and Figure 11 show the change in population, jobs, and acreage in transit supportive areas between 2020 and 2040. Key findings from this analysis are summarized below:

- Population in Wake County is generally spread out in low density, suburban areas. The highest density concentrations are in the downtown areas of Raleigh and Cary.
- Transit need based on socioeconomic factors is strongest in the City of Raleigh, especially neighborhoods south and east of downtown.
- Jobs are concentrated in downtown Raleigh and Cary, Research Triangle Park (RTP), and along major roadways. Service and retail jobs are more concentrated in the downtown areas, while office jobs are in RTP.
- Current transit demand is high or very high along the Raleigh-Cary-RTP-Durham corridor, Capital Boulevard, neighborhoods on the periphery of downtown Durham and downtown Raleigh, and in north Raleigh between I-440 and I-540.
- From 2020 to 2040, several parts of Wake County that had moderate levels of demand will transition to areas with stronger need and potential for transit service. In addition, some areas that previously showed limited demand for transit may be able to support service by or before 2040.
- Areas with the highest composite demand in 2040 are expected to be in downtown Raleigh and Cary, around the Research Triangle Park, near North Carolina State University, and south and north Raleigh.
- By 2040, more than half of the land area in Wake County is expected to support transit service. Roughly 4% of the land area will support frequent transit service, as compared to 1% in 2020.
 - Despite the small acreage, 12% of the population and 47% of jobs are expected to be in these frequent transit supportive areas by 2040.

Figure 7 Composite Transit Demand in 2020

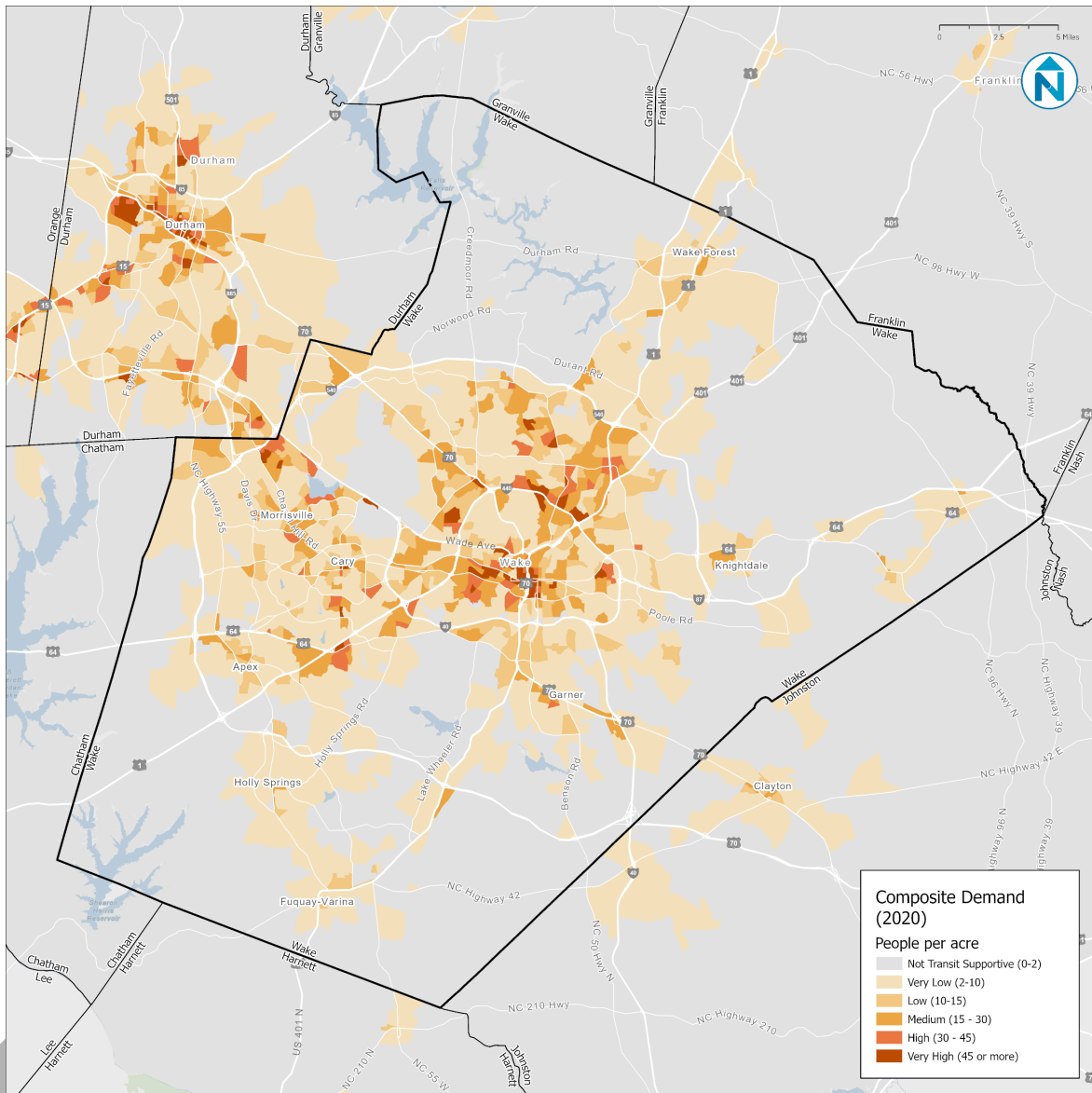


Figure 9 Population in Transit Supportive Areas – Change from 2020 to 2040

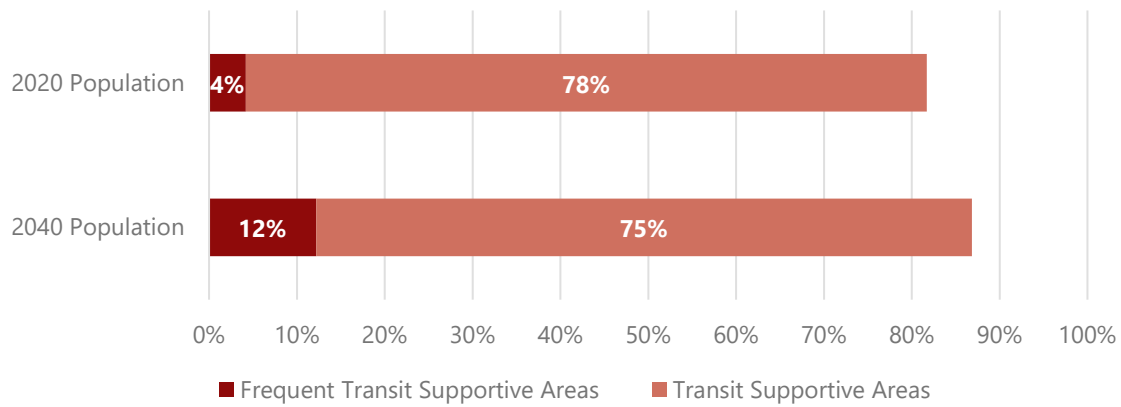


Figure 10 Jobs in Transit Supportive Areas – Change from 2020 to 2040

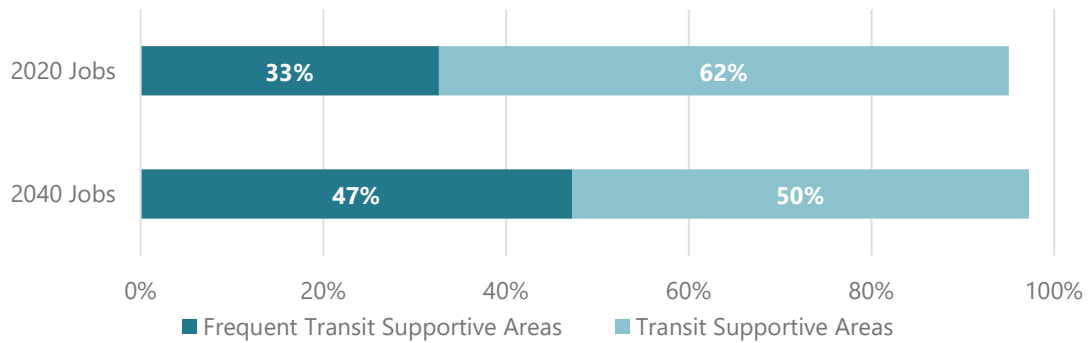
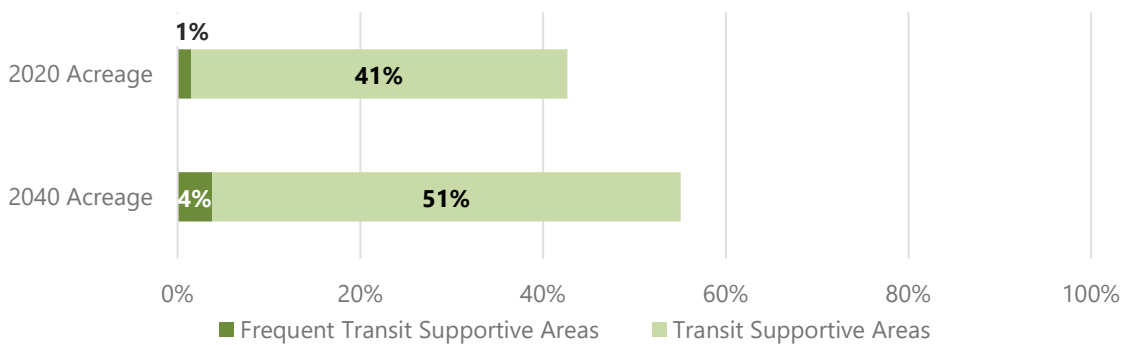


Figure 11 Transit Supportive Land Acreage in Wake County – Change from 2020 to 2040

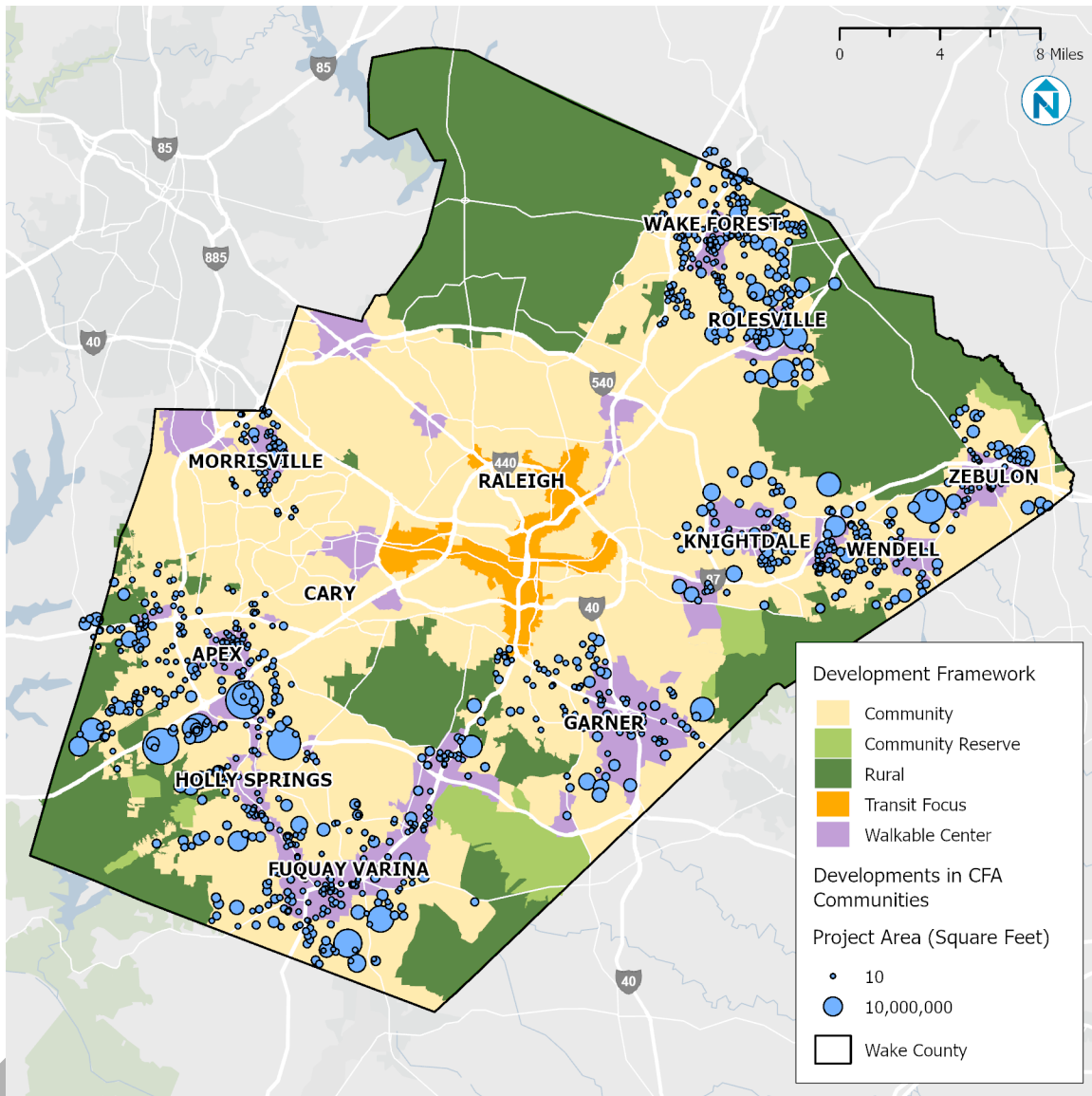


Suburban Growth and Development

The market analysis included community profiles on Raleigh and Cary as well as for each of Wake County's ten (10) towns: Apex, Fuquay-Varina, Garner, Holly Springs, Knightdale, Morrisville, Rolesville, Wake Forest, Wendell, and Zebulon. The analysis captured population and employment growth forecasts, existing and planned transit services, and recent development activity. The 10 Wake County towns, RTP and the County are also eligible to participate in the CFA Program, so this analysis accounted for CFA projects to date and provided guidance regarding potential future investments that could best fit the transit market in these areas.

In creating the community profiles, the Plan development team compiled data on ongoing and upcoming developments for each of the towns – development data was either provided directly by the community or collected using publicly available GIS data. Figure 12 shows recent and planned development in the towns overlaid on Wake County's Development Framework map, which was created as part of the Wake County's comprehensive plan (PLANWake) to encourage a transit-oriented development approach in the county. Development in Cary and Raleigh is excluded from the map to better show the distribution and size of development projects in non-urbanized Wake County.

Figure 12 Recent and Planned Development in Wake County Towns



Key findings on suburban growth and development in Wake County are summarized below:

- **Suburban Towns in Wake County are growing at an unprecedented rate**, with many communities experiencing population growth rates of 30% to 50% since the Wake Transit Plan was approved in 2016. In many cases, growth is on top of a small baseline population, but the pace of growth suggests communities are changing.
- **Towns in Wake County are actively planning for growth** with most communities recently completing comprehensive transportation plans, strategic plans, and/or

transit plans. In almost all cases, these plans are calling for investments in multi-modal infrastructure, including sidewalks and shared use paths.

- **All but two Wake County communities have participated in the Community Funding Area (CFA) Program.** Towns are using the CFA Program funds to plan, design and operate local transit services as well as investments in sidewalk and bus stop improvements.
- Data on recent and planned development shows that **most new projects are single use developments largely on the outskirts of downtown centers and often near highways.** Most developments in Wake County towns do not follow best practices for creating walkable, compact communities. Suburban style master planned developments are difficult to serve with transit.

Opportunities

Given the findings, the market analysis identified some initial opportunities and recommendations around the approach and service type appropriate to serving these growing communities by transit. These opportunities and recommendations were one of many inputs to the development of the 2035 Plan.

- **Potential for sub-regional solutions.** Wake County is a geographically large region covering 857 square miles. Unique characteristics within Wake County suggest potential for different solutions in different parts of the County:
 - **Apex is a “sub-regional hub” in southwest Wake County.** There are over 100,000 people in Apex and Holly Springs, plus another 35,000 in Fuquay-Varina. Apex already functions as an economic activity center with regional transportation access. Creating a mini-transit hub in Apex that is connected to neighboring towns with fast, frequent services to regional destinations is a potential future model.
 - **Northwest Wake County** also has nearly 100,000 people but is more rural, spread out over a larger area, and further from Raleigh and regional employment centers. Emerging solutions in this part of Wake County include on-demand service models that connect to Wake Forest as this area’s sub-regional hub.
 - **Garner** has more in common with the City of Raleigh than other parts of Wake County, and the planned BRT services in the town will change transit access. Local transit solutions may focus on first mile/last mile connections and more transit-oriented style development as compared with other parts of Wake County.
 - **Morrisville** is one of the densest communities in the County, with higher population and employment density than Cary. Morrisville was also an early adopter of microtransit service, and its Smart Shuttle service is a model for the

region. Morrisville also implemented a Transit Oriented Development and Zoning Plan that proposes creating a mixed-use, higher density and walkable community in Central Morrisville near planned future transit services, including the Western BRT extension. Given its proximity to Research Triangle Park (RTP) and Cary, rapid population, and employment growth, and planned future transit-oriented development, Morrisville could benefit from local investments that enhance access to the regional transit network.

- **Development patterns suggest on-demand microtransit style service is likely the most effective solution for local mobility.** On-demand microtransit services work in low density, suburban style development by picking up and dropping off riders at or close to their destination. The services can attract riders by providing a viable travel option, but the cost of microtransit on a per trip basis is high, with experience showing trips can cost between \$30 and \$50 per ride.

PUBLIC AND STAKEHOLDER INPUT

The 2035 Wake Transit Plan was heavily informed by participation and input from members of the public and community stakeholders as it strived to revisit and reaffirm priorities for Wake County's transit vision and determine how to create a 10-year investment strategy to align with these priorities.

The Engagement Plan for the 2035 Wake Transit Plan development process includes five separate engagement phases. The first three sought community and stakeholder input to inform the development of the 10-year investment strategy and draft plan document for review and adoption. Phase 4 will be a review and comment opportunity on the recommended 2035 Plan, and Phase 5 will wrap up the project with partners and community members.

The first three (3) phases of engagement were conducted in Spring-Summer 2024, Fall-Winter 2024, and Spring 2025. Each phase included Stakeholder Advisory Committee (SAC) meeting, comprised of elected officials, civic leaders, and representatives from business and community interests. The SAC provided feedback and comments on technical material and on the methods used to describe the technical content. In all cases, input from the SAC shaped the look and feel of materials brought to the public; the SAC also shaped the recommendations included in this report. Each round of engagement also included a variety of activities and strategies to collect input from community members using a combination of strategies to create awareness (social media posts, pop-up events, posters, partner emails and Wake Transit Plan branded giveaways) and collect feedback (surveys, presentations, focus groups/small group meetings and interactive activities).

The following section summarizes the first three engagement phases, including methods and findings. More information on how the Plan development team engaged with members of the community, including the overall Engagement Plan, is available in Appendix B.

Phase 1: Goals and Priorities

The 2035 Wake Transit Plan's first phase of engagement was held during Spring and Summer 2024; it was focused on educating stakeholders and the public about the status of the plan and asking for feedback on transit investment priorities. While the Phase 1 engagement strategy included several activities, it was centered around a transit priorities survey that asked participants to spend a limited budget across a list of 12 different transit investments. In addition to order of magnitude cost information, participants were also shown information about each investment's potential impact, such as how long it would take to build the project, how it would impact transit ridership and, how the strategy would improve rider safety and comfort, as well as service speed and reliability. A copy of the priorities survey is included in Appendix B.

The survey also included a series of demographic and socioeconomic questions used by the Wake Transit Plan Community Engagement team on previous efforts, to better ensure consistency and ability to measure trends in participation over time. The demographic questions helped the team track responses across key resident groups as well as geographically. The demographic and socioeconomic data analysis was also helpful in identifying differing priorities between some of the key groups. For the purpose of this summary, results will be framed in the context of overall survey responses and responses of regular transit riders. A copy of the demographic questions is included in Appendix B.

The survey was available online between May 6, 2024, and July 23, 2024. People who participated in community engagement activities, including the Stakeholder Advisory Committee, participated in a group transit investment budgeting activity similar to the exercise included in the survey.

Key Findings: Community Priorities

Approximately 1,900 people completed one or more parts of the priorities survey. About one-third of participants were familiar with the Wake Transit Plan and could name at least one Wake Transit Plan funded project. Roughly half (51%) of the people who took the survey reported they had heard of the Wake Transit Plan but didn't know any details and 17% had never heard of the Wake Transit Plan.

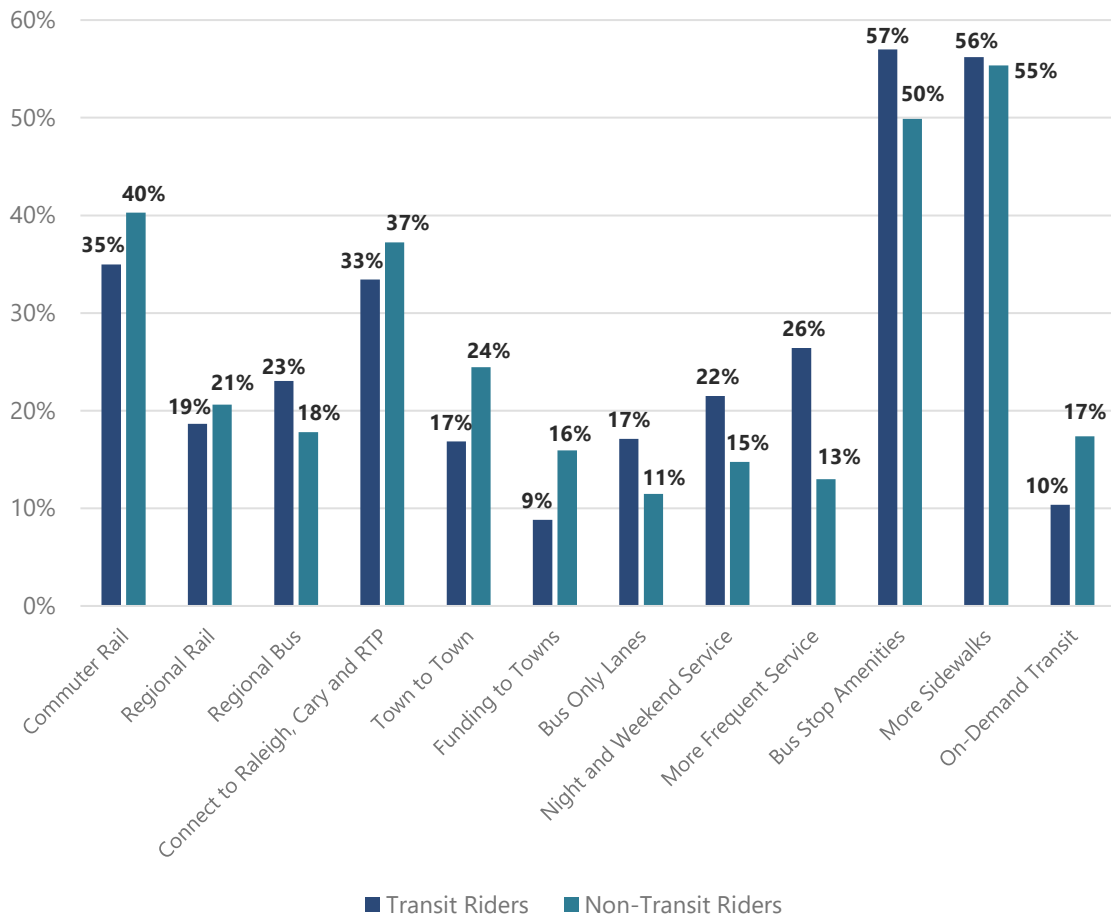
Findings from the survey showed that regional connections are important to people. Nearly everyone prioritized at least one regional connection, including commuter rail, connections

to Raleigh, Cary and RTP and regional rail or bus. Other high priority investments included crosswalks and sidewalks and bus stop amenities (see Figure 13).

Hearing from all Wake County travelers is important to the Wake Transit Plan. The needs and interests of transit riders – the people using the service – were a particular focus of the analysis. Demographic data showed that roughly 35% of the people responding to the survey use transit. Their priorities varied somewhat from non-riders in some critical ways:

- Transit riders prioritized frequent and off-peak service, improved bus stop amenities, and bus only lanes more than non-transit riders.
- Transit riders are also slightly less interested in commuter rail and town-to-town connections than non-transit riders.

Figure 13 Investment Priorities of Transit Riders in Wake County – Phase 1 Engagement Survey



Source: Nelson\Nygaard Consulting Associates

Phase 2: Evaluating Scenarios

The initial goal of the second phase of engagement was to share scenarios, or options for how the Wake Transit Plan could invest future resources in transit projects. The project team prepared packages of materials that outlined three scenarios – a base case, plus two options and presented them to the Stakeholder Advisory Committee in September 2024.

Stakeholders were asked to review the scenarios and share their feedback and preferences. While the discussion was robust, it was also clear to the Wake Transit Plan team that the material and choices presented was too nuanced, technical, and complex to bring to a broader audience.

Based on this feedback, the community engagement component of the engagement phase was streamlined to focus on a handful of key questions that were foundational to the individual investment scenarios. These questions included:

- **Rail Investment**—Would people be open to shifting away from a commuter rail service and instead, focus on expanding existing rail service and/or supporting planned new rail service in Wake County?
- **Bus Rapid Transit**—Would people be interested in a new Bus Rapid Transit (BRT) style service that would operate on I-40 and connect Raleigh and RTP using a dedicated travel lane?
- **Transit Investment (People vs Places)**—Would people prioritize investment in existing services (people) or new locations across Wake County (places)?

These three questions were packaged into a series of posters and exercises that were shared with community members through a variety of methods.

- Short survey with three questions available online and in a paper format
- 24 pop-up events held in each local jurisdiction of Wake County
- Paid media advertisements through Facebook and Qué Pasa Media Network
- Five presentations to local boards, committees, and councils
- Four focus group meetings with stakeholders (transit riders, people with disabilities, students, and service providers)

For several reasons, including a national and statewide election in November, engagement on the Wake Transit Plan straddled the holiday season with events scheduled between Thanksgiving and Christmas holidays as well as after New Years Day. While this was a deliberate strategy, it had consequences:

- Conducting engagement during the holiday season is challenging because daylight hours are short, temperatures are unpredictable, and people are busy. The team attended multiple tree-lighting events with limited success.

- Events held in January were also hampered by unpredictable weather, which was colder than usual. As a result, fewer people were willing to stay outside to talk about Wake Transit.

Key Findings: Preferences for Rail, BRT, and Investment Options

- Investing in regional rail service is highly desirable. During in-person and social media discourse, some residents expressed disappointment about the loss of commuter rail.
- People nearly equally want to see improvements that increase the bus service where it currently exists while also adding new routes to serve additional communities in Wake County.
- Current transit riders prioritized improving the existing bus network by increasing frequency and availability.
- Bus Rapid Transit is supported across the county.
- Rural areas generally prefer prioritizing the launch of new bus services and creating community multimodal transportation hubs.

Phase 3

The third phase of the 2035 Wake Transit Plan engagement, conducted in May 2025, was focused on sharing the draft investment strategy and gathering feedback from the public. An online survey was distributed through social media, pop-up sessions, and scheduled events to garner feedback on the draft 10-year investment strategy.

There were two main themes in the survey responses – those who support transit expansion in the form of bus service and those who prefer a larger focus on rail. Of those supportive of bus service expansion, survey respondents expressed the desire to expand bus transit in areas that are not focused on in the 10-year investment strategy, specifically eastern and southern areas of Wake County, while others express the desire to increase the frequency of existing high demand routes, rather than create new routes and increase connection opportunity between Wake County communities. Others believed that transit expansion should focus on rail, rather than new bus routes.

Most respondents agreed with the proposed changes to the Community Funding Area Program Management Plan (CFA PMP). Those who did not agree with the proposed changes believed the cap for a single applicant should be increased or removed. Feedback on the proposed Microtransit Guidelines was primarily positive. Most concerns about Microtransit were related to the cost of service.

To supplement and expand the reach of the online survey, pop-up events were held around Wake County to meet residents in their respective communities at locations where events were already planned. At each pop-up event, boards with the proposed Wake Transit Plan Investment Strategy were displayed. Participants were invited to ask questions and fill out the online survey with comments. In total, there were 10 pop-up events held from May 3, 2025, to May 31, 2025. Below are the primary takeaways from the pop-up events:

- Increasing the frequency of existing bus routes, specifically on weekends is supported.
- Participants were curious about how route change communications would be made.
- Future rail expansion was discussed at most events.
- Many expressed interest in expanding connections to major employers, the airport, the Town of Apex, the Town of Fuquay-Varina, the Town of Holly Springs, and the town of Morrisville.
- Frequent transit riders expressed the desire for better conditions at existing stations. Such as improved services for those with disabilities, more shelters, and increased cleanliness.

4 TRADE-OFFS, OUTCOMES, AND POLICIES

OVERVIEW

The 2035 Wake Transit Plan (WTP) lays out an investment strategy for how expected revenues will be invested and programmed for the 10-year period between fiscal years 2026 and 2035. The Four Big Moves – Connect the Region Connect All Wake County Communities, Create Frequent, Reliable, Urban Mobility and Enhance Access to Transit – are the overarching goals of the Plan.

While the Four Big Moves guide investment, the Wake Transit Plan does not assign specific investment percentages for each Big Move. Constraining spending by investment category would be challenging because many of the desired outcomes of each goal overlap. As a result, subsequent iteration of the Four Big Moves requires talking with stakeholders and members of the public about how to balance investments across the Four Big Moves. The early versions of the Four Big Moves focused on two fundamental and competing ways to invest in transit:

1. **Ridership vs Coverage:** Investing in transit services where they would carry the most riders or ensure that most county residents have access to some type of transit service, even if the bus routes don't carry a lot of riders. This was captured in a ridership versus coverage trade-off and measured – in part – by capturing proximity or access to transit.
2. **Service vs Infrastructure:** Balancing spending on infrastructure projects (i.e., building stations or buying buses, etc.) as opposed to investing in transit operations (i.e., putting more buses on the road); this choice was captured in the first Wake Transit plan as "infrastructure versus service." While no specific goals were set, spending on capital projects as compared with operating projects is measurable.

In the 2035 Wake Transit Plan, based on feedback from stakeholders and community members, the investment decisions were adjusted slightly to focus on three objectives:

- **Invest in the Regional Network:** Input and comments from stakeholders and community members suggested a clear and consistent desire to keep investing in projects that connect Wake County communities to the bigger regional travel network and major destinations. These types of investments included expansion of the Bus Rapid Transit network, providing service connections to and between major activity centers, and making sure investments continue throughout the network, like bus stops, sidewalks, and crosswalks.

- **Serve More People:** Stakeholders and community members were clear about their desire to invest in bus services where ridership is high. These types of investments include services and capital projects that will be used by the greatest number of people. Many – but not all – of these projects involve adding service and building transit supportive facilities in and around Raleigh, Cary and RTP.
- **Serve More Places:** People living and working in Wake County also demonstrated strong support for making sure all Wake County communities benefit from the transit investment strategy. These types of projects and programs include setting aside increased funding for the Community Funding Area Program and building community multimodal transportation hubs in suburban locations.

Like previous versions of the Plan, the 2035 Wake Transit Plan did not set specific targets or measures for each of these focus areas. Instead, it uses these three broad strategies to communicate that the overall investment plan is advancing the community's priorities. This chapter describes the trade-offs associated with competing goals and how the 2035 Plan balances them. It also describes changes to WTP policies as well as the proposed measures and expected outcomes associated with the plan.

INVESTMENT TRADE-OFFS

The 2035 Wake Transit Plan faced specific decisions and trade-offs associated with spending constrained resources. Some of these decisions involved changing course or direction from the previous objectives set by Wake Transit Plan, while others involved a change of emphasis. In all cases, decisions involved learning from the first 10 years of Wake Transit Plan implementation.

Network Development

The Wake Transit Plan is the vision for transformative investment in Wake County's public transportation network, including operational service expansion and the completion of infrastructure projects that, combined, will change the way people travel locally and across the region. Two of the major investment projects included in the original Wake Transit Plan were the Commuter Rail project connecting Durham and Raleigh and the development of four core Bus Rapid Transit (BRT) routes. These projects are reflected in two of the Four Big Moves: Connect the Region and Create Frequent, Reliable, Urban Mobility.

Commuter Rail and Regional Rail

Since its inception, the Wake Transit Plan has included commuter rail investment as a core component of the funding strategy. The commuter rail line was intended to connect Durham and Garner with stations at RTP, Morrisville, Cary, Raleigh, and Garner. A two-year feasibility

study³ conducted in two phases from 2020 to 2022 revealed that the commuter rail service, as envisioned in 2016, would be much more expensive, and would take much longer to develop than previously expected. Study findings also indicated other challenges, including an unstable outlook for regional, state, and federal financial support and unsure opportunities to improve or expand track in urban areas.

At the same time, new opportunities have emerged through increased federal and state investment in “regional rail,” which broadly includes rail services that increase connections of Wake County cities and communities to destinations across North Carolina and in neighboring states. Projects initiated by federal and state agencies are creating opportunities for the Wake Transit Plan to leverage its resources to make certain projects (like train stations or track improvements) and services (such as additional trips within Wake County) to achieve rail travel expansion in a more cost-effective and timely way.

INVESTMENTS/CHANGES FROM PREVIOUS PLANS

The decision to postpone development of commuter rail and instead focus on regional rail was a major change confirmed as part of the 2035 Wake Transit Plan. The decision was confirmed with stakeholders and the public as part of this planning process. While commuter rail may be revisited in future iterations of the Wake Transit Plan, the current plan is pausing investment in this project. Instead, the 2035 Wake Transit Plan recommends advancing development of Wake County’s rail services through coordinated investments and partnerships associated with regional rail projects. It also recommends developing BRT services on I-40 to connect downtown Raleigh with the Research Triangle Park (RTP), a key connection that would have been provided as part of the commuter rail service.

Bus Rapid Transit

The Wake Transit Plan relies heavily on the development and implementation of Bus Rapid Transit corridors to build out a fixed-guideway, high-capacity network. The original Plan included funding to design and build 22 miles of BRT service on four BRT corridors that radiate outward from downtown Raleigh.

- **New Bern Corridor** – east from downtown Raleigh along New Bern Avenue to the WakeMed campus and New Hope Road.
- **Southern Corridor** - south from downtown Raleigh on S Wilmington Street to Garner Station in Garner.
- **Western Corridor** – runs west from downtown Raleigh along Western Boulevard to downtown Cary.

³ <https://www.readyforrailinc.com/feasibility/>

- **Northern Corridor** – designed to run north from downtown Raleigh along Capital Boulevard to Crabtree Creek.
 - Raleigh began a major investment study in 2023 on the Northern Corridor and identified two study areas for the project: Triangle Town Center and Midtown. The 2035 Wake Transit Plan recognizes these two BRT Study areas and has included them in the Plan as two routes for the BRT Northern Corridor.

While none of the core BRT projects were operational at the time the 2035 Wake Transit Plan was published in 2025, all of them are advancing. New Bern will be the first operational BRT corridor in North Carolina, putting Wake County and the City of Raleigh at the forefront of project development in the state. Current progress for the core corridors can be viewed online at <https://raleighnc.gov/bus-rapid-transit>. Wake Transit partners and the Raleigh BRT team have gained valuable knowledge developing the projects, including experience, expertise, and success in advancing major transportation investments through the federal project development process. To date, the GoRaleigh BRT team has successfully obtained federal grant funding support for valued at over \$35 million for the New Bern, plus an additional \$86 million and Southern Corridors.

The BRT corridors identified in 2016 reflect key connections and some of the County's highest performing transit corridors. The Wake Transit Plan has invested in these corridors by operating more frequent service for longer hours of the day more days of the week. These four corridors are currently GoRaleigh's and GoCary's highest ridership corridors, carrying 50-60 riders⁴ per hour in peak times. The success of these services underscores the importance of both the corridors and the convenience of frequent, reliable transit service.

Despite these successes, two critical challenges persist: implementation timeframes and project costs. All core BRT corridors were planned to be operational by 2030. As of 2025, while several are in final design, none have opened and none are under construction. The earliest operation date is expected for 2028. In part because of project delays and in part because of factors beyond the control of the Wake Transit Plan (continued rapid growth, inflation, etc.), the cost to build each corridor has increased steadily. The 2016 plan estimated development cost of the four BRT corridors at \$347 million; in 2025, the estimated cost to develop the core corridors is \$812 million.

INVESTMENTS/CHANGES FROM PREVIOUS PLANS

The 2035 Wake Transit Plan includes several changes and new investments in BRT projects.

- **Network Expansion** – the 2035 Wake Transit Plan includes funding to support continued development of the Southern (Garner to Clayton in Johnston County) and

⁴ GoRaleigh Route Statistics Fiscal Year 2025

Western (Cary to RTP via Morrisville) BRT corridor extensions. It also includes funding for the Northern corridor split to serve two endpoints at Midtown/North Hills and Triangle Town Center. BRT services are under study and advancing to design. They are expected to be operational by 2035.

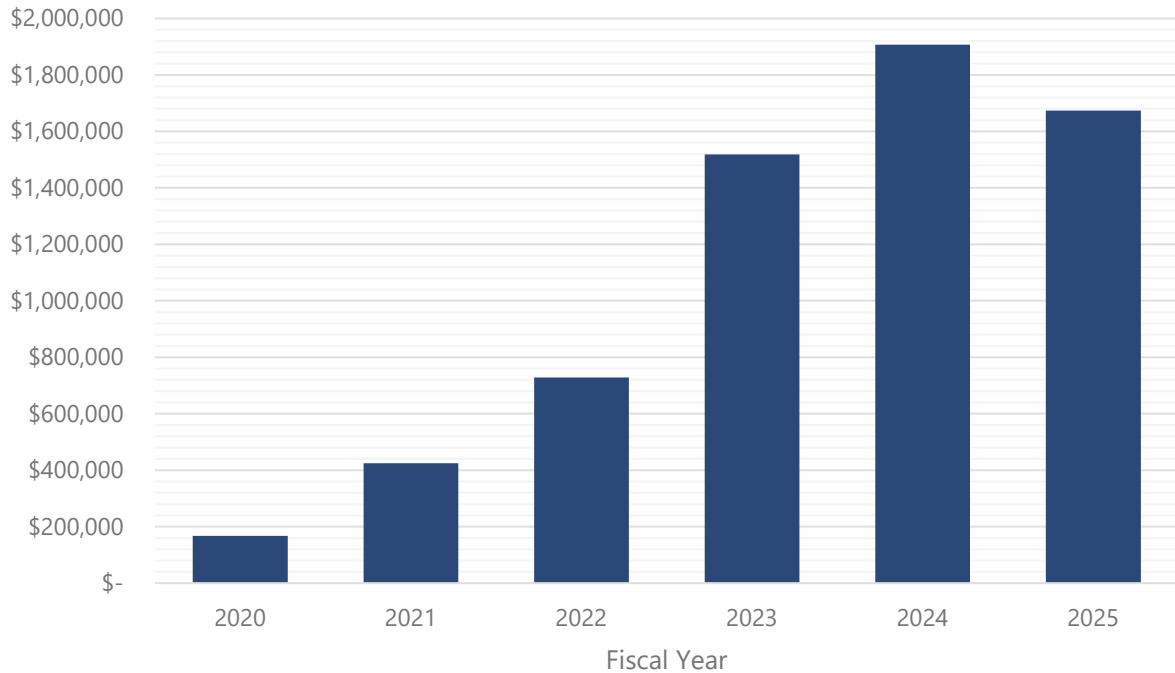
- **I-40 BRT** – a new BRT corridor connecting downtown Raleigh with RTP via the Lenovo Center and RDU creating fast, frequent reliable connections between RTP and downtown Raleigh. The I-40 BRT also creates an opportunity to expand and connect the regional transportation network with a potential new Airport Transfer Hub near RTP and a connection to Cary via a BRT service on Harrison Avenue. The 2035 Plan calls for a major investment study to begin as early as 2027 to start exploring the feasibility and future design of this corridor.
- **Future BRT Corridors** – the 2035 Wake Transit Plan includes funding for the study and development of up to five additional BRT corridors over the 10-year period. While not confirmed, these new BRT corridors may include Harrison Avenue (see I-40 BRT), Glenwood Avenue, an extension of New Bern to Knightdale, and a route from Cary to Apex and/or Blue Ridge.

Community Funding Area Program

The Community Funding Area (CFA) Program ensures all Wake County communities can directly benefit from the Wake Transit Plan. The program is unique because it is designed to encourage community-oriented solutions and provides match funds to advance local transit projects. With the 2025 update of the Community Funding Area Program Management Plan, there are 12 eligible program participants: the 10 towns, Wake County and RTP. CFA Program funds can be used for planning studies, transit services and transit-related capital projects.

The CFA Program is a success. To date, more than 15 grants have been awarded, including seven for planning projects and technical assistance, five for capital projects, and four for operating new services. Despite the number of participants, total program investments represent a small portion of Wake Transit expenditures, distributing roughly \$6.4 million to local communities through FY 2025. (see Figure 14).

Figure 14 CFA Program Grant Funding Awarded per Fiscal Year



Source: Wake Transit Plan, adapted by Nelson\Nygaard Consulting Associates

INVESTMENTS/CHANGES FROM THE 2035 WAKE TRANSIT PLAN

As part of the 2035 Wake Transit Plan, the project team updated the CFA Program Management Plan (PMP) (see Appendix C) to ensure long-term program health and the program's ability to support the growth plans and needs of eligible funding recipients. The updated CFAPMP combined with conversations with stakeholders, transit riders and community members led to a handful of recommendations reflected in the 2035 Wake Transit Plan:

- Reduce the local match requirement from 50% to 35% for capital and operating projects. This means that individual communities will need to provide 35% of project costs, rather than the previously required 50%. This change reflects two factors:
 - The previous match amount was selected to be consistent with the amount of local funding provided by the City of Raleigh and the Town of Cary towards their transit systems. While the value of Raleigh's and Cary's investments has remained consistent, the portion of local funding is decreasing due to Wake Transit Plan investment. To ensure continued consistency, the CFA Program match was reduced by equal measure.

- Communities consistently cited previous match levels as a reason for not participating in the program.
- Fund the CFA with \$60.7 million over the 10-year period between 2026 and 2035. This total includes CFA reserve funds that were not spent previously, historic funding levels of about \$3 million per year, plus an additional \$2.5 million per year. In total, the CFA will have approximately \$6 million per year, each year to invest in local transit projects. This amount reflects the reduced match assumptions and that all existing operating projects will continue to be funded through the CFA Program.

POLICY DEVELOPMENT

As part of creating a 10-year investment strategy, the WTP also identified a handful of policy changes and/or recommendations. In all cases, the policy recommendations do not directly impact the 10-year investment strategy; instead, the recommendations update or refine assumptions and approaches incorporated into previous versions of the plan.

Capital Reserve Fund

Future years of Wake Transit Plan implementation require an extensive capital outlay for major infrastructure projects. The original Wake Transit Plan was modeled using a 5% capital fund balance as an overall reserve. During the update process for the 2030 Plan, the capital fund balance was increased to include 10% of the estimated Wake BRT project costs but maintained a 5% rate for all other capital projects. It is unclear if the higher reserve costs were tied to BRT projects to protect against cost overruns or unexpected costs. However, the fund balance is designed as a safeguard against unforeseen circumstances, rather than to account for project budgets and contingencies. Therefore, the 2035 Wake Transit Plan recommends again setting the capital fund balance at a 5% rate for all projects.

Microtransit

Microtransit—an on-demand, flexible, shared-ride, transit service—is a relatively new public transportation option. In the 2030 Wake Transit Plan, communities were starting to study and explore microtransit, but experience with the service was relatively limited. Since 2021, however, interest in and experience with microtransit in Wake County has grown significantly. As of June 2025, several successful services are operating in Wake County, including Morrisville's Smart Shuttle; Wake County, Wendell, and Zebulon's GoWake SmartRide NE; GoRaleigh's MicroLink: Rolesville; and GoWake Forest. Other Wake County communities are planning to implement microtransit services in the next few years.

Funding for microtransit emerged as an important issue for the Wake Transit Plan, including the desire for service standards, branding guidelines and potential service coordination. As part of developing the 2035 Wake Transit Plan, the first Wake Transit Microtransit Guidelines were established (see Appendix D).

The Microtransit Guidelines outline funding options for these types of services and set a series of optional and required standards for service implementation and performance metrics, which vary by funding source. Microtransit services funded through the CFA Program generally have more flexibility than microtransit services funded through the WTP.

Required elements of Wake Transit Plan funded microtransit include:

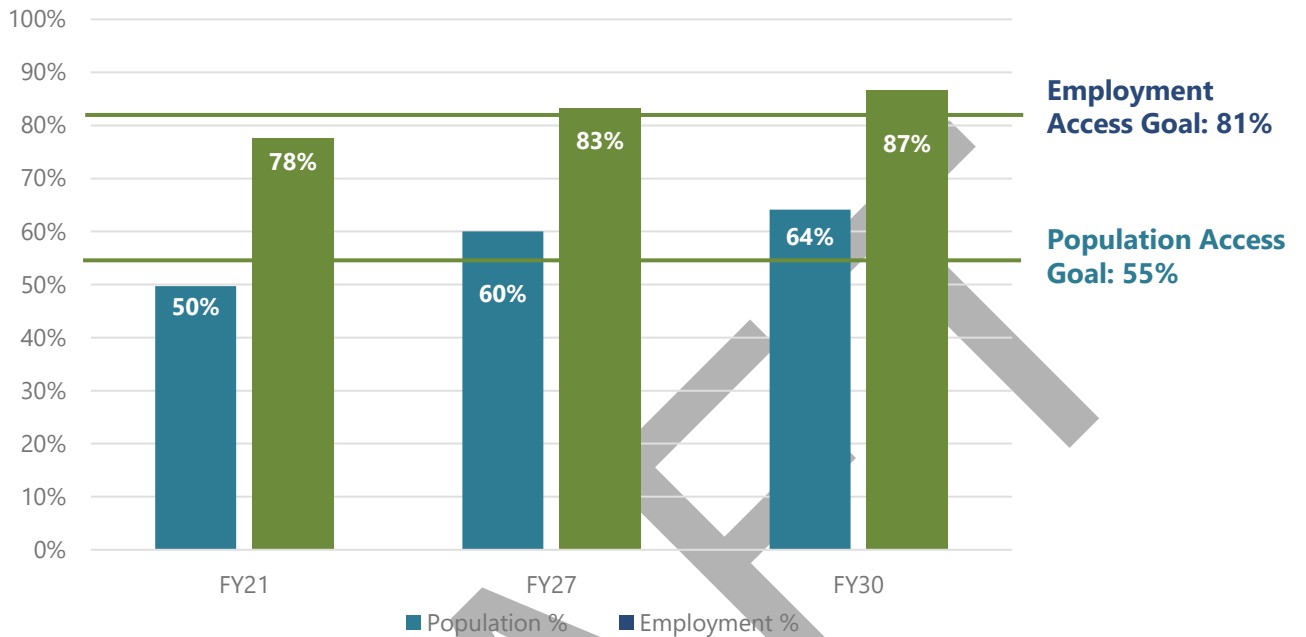
- Vehicles, booking systems and facilities must be accessible to all riders and meet ADA standards.
- Service must operate on weekdays for at least 12 hours per day.
- The standard for passenger wait times is 30 minutes.
- Services should operate with a curb-to-curb model.
- The base fare must be aligned with the WTP fare structure and transfers to/from WTP funded services must be free.

Proximity and Access to Transit

Two clearly stated goals of the Wake Transit Plan are to increase the percentage of Wake County residents and jobs located within proximity of transit service. The 2035 Plan makes some significant changes to how these goals are defined and measured.

Historically, progress toward the goals has been measured by calculating access to transit in terms of both the frequent bus network and all-day transit services (previously defined as 17 hours per weekday). The targets set in the 2027 Plan and confirmed in the 2030 Plan were that 55% of Wake County residents and 81% of jobs would be within $\frac{3}{4}$ of a mile of all-day transit service. Planned investments in the next few years suggest they will be met in FY27 (Figure 14). The targets for access to frequent service were set at 43% for jobs and 23% for population; both are on track to be met—or nearly met—by FY30. (see Figure 15).

Figure 15 Residents and Jobs Within ¼ Miles of All-Day Transit



Source: Wake Bus Plan, total transit investment (individual agency and Wake Transit Plan funding)

Figure 16 Residents and Jobs Within ¼ Miles of Frequent Transit



Source: Wake Bus Plan, total transit investment (individual agency and Wake Transit Plan funding)

Investments/Changes from Previous Plans

The 2035 Plan update includes a revision to how proximity to transit is calculated and sets more stringent performance targets. Here is a summary of the adjustments:

- Access is calculated to specific bus stops instead of creating a buffer around the entire transit corridor.
- The $\frac{3}{4}$ mile buffer area is replaced with a shorter $\frac{1}{2}$ mile distance that follows the sidewalk network.
- There will now be four measures tracked for this goal:
 - 35% of Wake County's population will be within $\frac{1}{2}$ mile of the frequent service network.
 - 50% of Wake County's jobs will be within $\frac{1}{2}$ mile of the frequent service network.
 - 75% of Wake County's population will be within $\frac{1}{2}$ mile of the all-day transit network.
 - 90% of Wake County's jobs will be within $\frac{1}{2}$ mile of the all-day transit network.

Setting a higher standard demonstrates continued commitment to improving transit access as an area of Wake Transit investment. Using the road network to measure distance provides a more accurate picture of accessibility to routes, and shortening the distance to one-half mile reflects the true distance that most riders feel comfortable and safe walking to from transit services. It also allows us to identify and prioritize pedestrian infrastructure improvements such as sidewalks and crosswalks as part of a holistic transit experience, and measure progress accordingly.

Figure 17 Proposed Change from Proximity to Access to Transit

	Current "Proximity to Transit" Measure	Proposed "Access to Transit" Measure
Distance	$\frac{3}{4}$ mile (15–20 minutes walking)	$\frac{1}{2}$ mile (10–15 minutes walking)
Distance From...	Transit route or corridor line	Specific bus stops in the transit network
Buffer Method	"As the crow flies" distance from the corridor	Following streets with sidewalks

Project Prioritization

In a situation where more money is requested than is available to be spent, or when a project not previously programmed to receive Wake Transit funds is requested for consideration of funding, the Project Prioritization and Reprogramming Guidance determines the order of funding across the approved projects and programs – the highest priority projects are funded first, and lower priority projects are funded last. If the Wake Transit Plan does not have enough funding in any given year, the funding will be distributed to the highest tier project category(ies) until it runs out. If there is excess funding, the TPAC may elect to distribute excess funds in the same way (see Appendix E).

The prioritization guidance was updated as part of the 2035 Plan update process. It modifies an eight tier system down to three broad tiers of projects, with additional prioritization within each tier. Within each tier, the highest priority projects are listed first. Tier 1 projects will always be funded first; Tier 2 projects will be considered if there is funding remaining and Tier 3 projects will be funded last. Some projects (including rail projects) may initially be classified as Tier 3 but as projects are incorporated into the Capital Improvement Program (CIP) or Multi-Year Operating Plan (MYOP), they may be reclassified as Tier 1 or Tier 2 projects and prioritized for funding.

5 FINANCIAL PLAN

OVERVIEW

As discussed, the Wake Transit Plan reflects a funding package approved by Wake County voters in 2016. The main sources of revenue supporting the Plan are:

- A ½ cent Local Option Sales Tax
- A \$7 Vehicle Registration Fee levied in Wake County only
- A \$3 increase to the regional Vehicle Registration Fee
- A portion of the regional 5% Vehicle Rental Tax allocated to Wake County by the GoTriangle Board of Trustees

The Wake Transit Plan was adopted in November 2016. Wake County began collecting the ½ cent local option sales tax on April 1, 2017. Revenues raised through the taxes and fees are collected and managed by the Triangle Tax District.

Fundamentally, the 2035 Wake Transit Plan is a financial investment strategy that aligns the revenue estimated to be available with phased spending on projects and services that collectively will advance the overarching goals – the Four Big Moves – outlined in the plan.

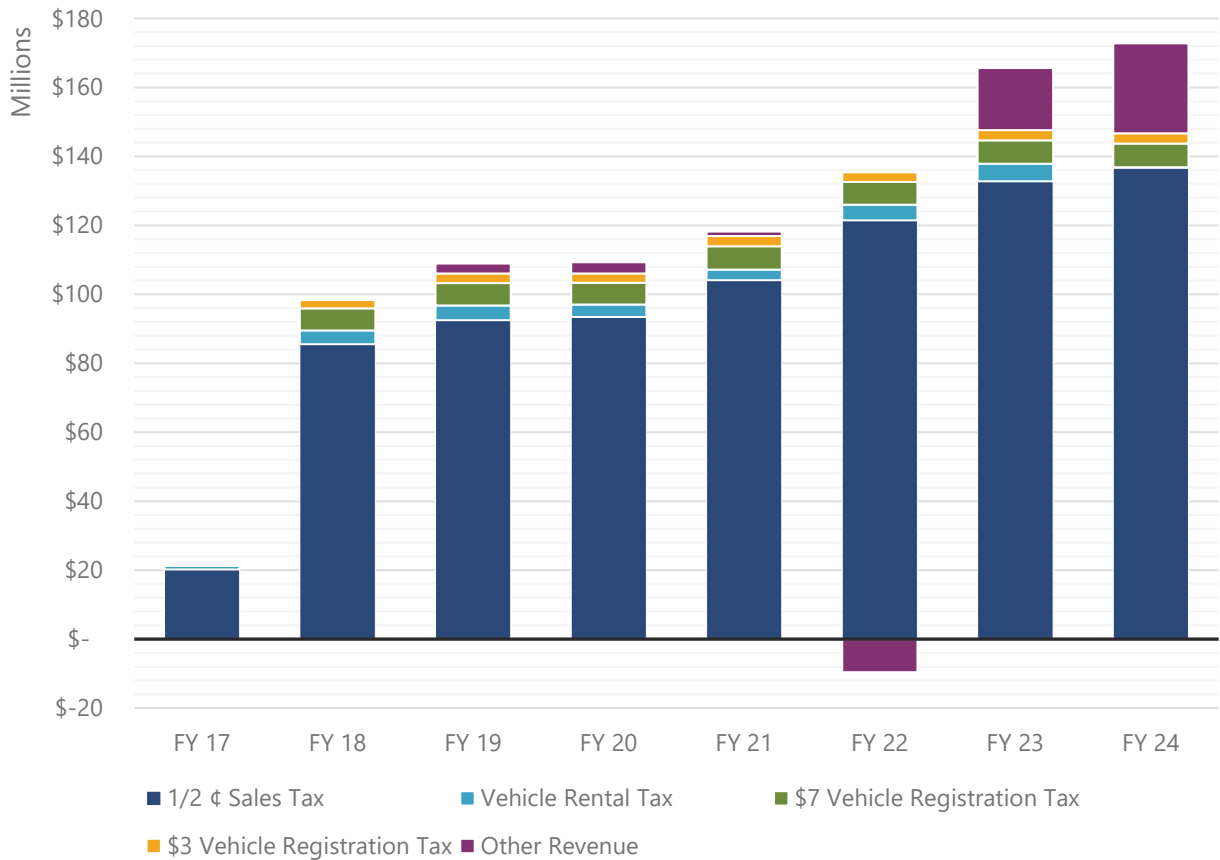
What's the difference between the \$3 and \$7 vehicle registration fee?

- The \$3 vehicle registration fee is an increase to an existing regional vehicle registration fee (\$5 per vehicle) levied on vehicles registered in Durham, Wake, and Orange Counties. The increased tax is dedicated to the Wake Transit Plan.
- The \$7 fee is a Wake Transit specific fee levied on people registering vehicles in Wake County.

REVENUE

Between 2017 and 2024, the Wake Transit Plan raised \$920.7 million in revenues. The majority (85%) of the revenue is associated with the ½ cent sales tax (see Figure 18). The revenue stream has consistently outperformed expectations in part reflecting strong growth in Wake County. Revenues are expected to continue to grow through 2035. The total revenue projected from the four primary sources (sales tax, Wake County car registration fee, regional car registration fee increases and rental car tax) between FY2025 and FY2035 is \$1.896 billion.

Figure 18 Wake Transit Plan Revenues Sources by Year (FY17 – FY24)



Source: Wake Transit Plan adapted by Nelson\Nygaard

In addition to the ongoing revenue streams, the 2035 Wake Transit Plan assumes access to \$1.4 billion collected through other revenue sources, such as:

- **Federal Grant Operating Funds** – revenue projections assume \$45m in federal support for increased service levels for BRT and local bus operating expenses.
- **Federal Capital Grants BRT** – assumes \$386 million in federal grants to support BRT projects. These revenues also include \$86 million, which has been secured through federal Small Start funds for the Southern Corridor. The 2035 Plan assumes an additional \$150 million from federal grants to support both the Western and Northern BRT projects. The estimate of \$150 million per project is roughly 50% of the corridor implementation costs, which is in line with other Wake County BRT projects.
- **Wake Transit Plan Specific Fare Box Revenues** – identifies \$54.4 million in fare box revenues that can be attributed specifically to the Wake Transit Plan service investments. These fare box revenues are in addition to fare revenue included in each agency's baseline fare revenues (i.e., fares collected prior to the Wake Transit Plan).

- **State Funds** – \$100 million is assumed to be available from North Carolina State Department of Transportation (NCDOT) funding specifically to support design and implementation of the two BRT extensions: Southern between Garner and Clayton and Western between Cary and RTP.
- **Debt Service/Bond Funding** – since its inception, the Wake Transit Plan has assumed that the Plan will issue debt, leveraging the sales tax revenue so capital projects can be implemented faster. Initial assumptions tied debt service to the Commuter Rail project. The 2035 Wake Transit Plan uses BRT investments to secure bonds and includes bond proceeds of \$816 million over the 10-year period.
- **Excess Liquidity** – in 2025 the Wake Transit Plan has access to approximately \$150m in funds that have already been raised by the Wake Transit Plan and not yet assigned to specific projects or programs.

Total funding available to the 2035 Wake Transit Plan is approximately \$3.3 billion, including revenue forecasted to be raised over the course of the 10-year period, grant programs available through federal and state resources, and previously collected, unspent Wake Transit Plan funds.

EXPENDITURES

The 2035 Wake Transit Plan allocates funding over the 10-year period between FY26 and FY35 to align with expected revenues. It balances spending across committed projects and new investment priorities identified through the plan development process. Expenditures are also constrained by Wake Transit Plan governance agreements that require certain actions to ensure financial stewardship by restraining investment strategies from overextending available funding. These regulations include:

- **Capital Reserve Fund** – the Wake Transit Plan sets aside 5% of planned capital spending as reserve in cases of unforeseen circumstances and/or changes in the revenues. The reserve fund is not intended to support cost overruns or increases associated with specific projects and instead is designed to be a safeguard and protection against worst case scenarios.
- **Operating Fund Balance** – the Wake Transit Plan has an operating fund that is 25% of the previous years' operating spending that is retained in cases of unforeseen circumstances or changes in revenues. The operating fund does not accumulate over time, instead is held in reserve for protection against worst case scenarios.
- **Debt Coverage Ratio** – the debt coverage ratio is a metric that ties cash flow (revenue streams) and spending, so that ongoing spending will not exceed expected revenue. The Wake Transit Plan sets a 1.25 debt service coverage ratio. This is consistent with financial industry practices and means that the income covers

spending by 125%, or, for example, the Wake Transit Plan must have \$125 in revenue for every \$100 in planned expenses. Two unique elements of the Wake Transit Plan debt coverage ratio are that 1) cash flow is defined as revenue from the sales tax only. It does not include revenues from vehicle registrations or rental car taxes, and 2) the debt coverage ratio applies to operating expenses only. This constraint recognizes that operating expenses are ongoing, so must be paid for annually.

2035 WTP Expenditures

These two pieces combine to create a 10-year investment strategy that outlines how \$3.3 billion in transit funding will be spent between FY 2026 and FY 2035 (see Figure 19).

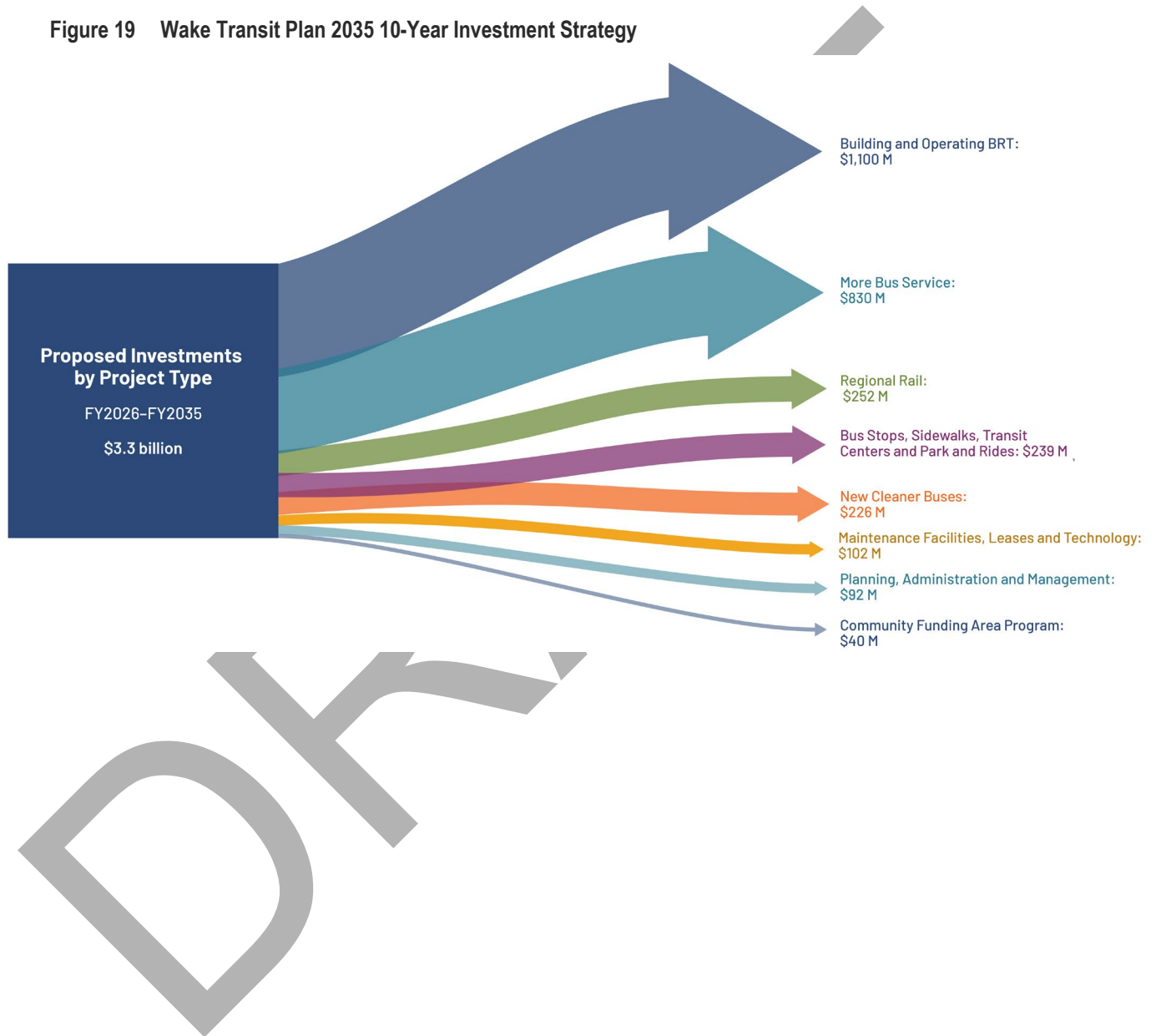
Highlights of the investment strategy include:

- \$1.8 billion will be spent on projects and services that were already committed to as part of previous work plans and Wake Transit Plans.
 - Just over half of the money (\$941 million) is for operating projects, like fixed-route bus services, other bus routes, the Community Funding Area program and administering the Wake Transit Plan.
 - Slightly less than half of the funds (\$831 million) will be used for capital projects, like buying buses, developing Bus Rapid Transit (BRT) corridors, building bus maintenance facilities, and improving passenger facilities, like transit centers, bus stops and park and ride lots.
- \$1.1 billion will be spent on new projects and services that have not been included in previous work plans or Wake Transit Plans.
 - Operating projects account for a smaller portion of these funds (\$166 million) as compared with previous plans.
 - Capital projects account for most of the “new” funds, or about \$954 million and will be directed to regional rail investments, developing new BRT corridors, buying vehicles, and improving transit centers, bus stops and other passenger facilities.
- \$429 million will be used to pay back borrowed funds (bonds) and other debt service. A portion of these funds are also being held as “reserve” funds to protect against worst case scenarios.

This 10-year investment strategy is different from previous Wake Transit Plans because, while it adds a handful of major investment projects, it also focuses on finishing projects already started. It also takes a major project out of the plan – at least for the foreseeable future – by pivoting away from commuter rail and instead utilizing WTP funding to help leverage and expedite investments in the regional rail network, including projects advanced by the North Carolina Department of Transportation (NCDOT). This pivot reflects studies funded through

the WTP that show that commuter rail service envisioned in the WTP is neither financial feasibility nor practical. Instead, over the next 10 years, the Wake Transit Plan will invest in strengthening existing and planned rail projects and services, like the S-Line, and building a BRT service on I-40 to connect Raleigh and the Research Triangle Park.

Figure 19 Wake Transit Plan 2035 10-Year Investment Strategy



6 OUTCOMES: MEASURING AND TRACKING SUCCESS

OVERVIEW

The 2035 Wake Transit Plan is focused on diversifying travel choices through a faster, more reliable, and more convenient network of transit services in Wake County. Planned spending totals approximately \$3 billion and includes a broad range of investments ranging from capital investments, operating projects, and ongoing administration and management of the program. The projects are described in more detail in other parts of this Plan:

- Increase spending on bus service in Wake County, including increasing the hours and days of operations, the frequency of service and new bus routes. All existing transit operators will see increased funding for their services, including GoCary, GoRaleigh, GoTriangle, and GoWake Access.
- Purchase of more than 200 new buses to replace the existing fleet and support the service expansion.
- Complete bus maintenance projects that expand and update the bus maintenance facilities and associated resources (fueling, training, call centers, etc.) required to deliver bus service. All existing operators will benefit from these projects.
- Operate BRT service in Wake County, including the four corridors that radiate from downtown Raleigh and offer connections north (along Capital Boulevard to the Midtown and Triangle Town Center areas), east (New Bern Avenue), south (Wilmington) and west (Western Avenue), two extension corridors (Cary to RTP and Garner to Clayton) and the I-40 BRT connecting Raleigh, RDU and RTP. These corridors will create 90 miles of BRT service.
- Invest in bus stops to meet the Americans with Disabilities Act (ADA) standards and ensure 80% of bus riders board at stops with a bench or shelter. Total investments in bus stops, sidewalks and crosswalks are estimated at \$40m over the 10-year period.
- An additional \$175 million will be available for investments in transit centers, connection points, community transportation hubs, and park and ride lot facilities.
- Invest more than \$60m in the CFA program to support local communities in building new projects and developing new services.
- Fund technology investments, including ongoing and new projects related to fare payment and passenger information systems.
- Study and plan for future projects, including the next generation of BRT corridors.

- Support responsible management of the Wake Transit Plan through investments in tax district and transit plan administration.

MEASURING AND TRACKING SUCCESS

Transit Investments

Given the size and scale of the planned investment, the WTP has consistently tracked spending and outcomes associated with spending. The [Wake Transit Plan Tracker](#) is an interactive dashboard that reports on progress according to five categories: service investments, service coverage, growth of the fixed guideway (BRT and rail network), ridership and funding. This tool will continue to be an important resource for stakeholders and community members to track the impact of their investment.

In addition to these ongoing tools, the 2035 WTP identified three measures that capture expected outcomes and demonstrate success of the investment strategy.

- **Access to transit**, or the number of people and jobs within ½ mile of a bus stop. This metric reflects an outcome – or planned goal – of the plan. As discussed, it has been used by the WTP since 2016, although the 2035 WTP recommended changing this metric to make it more stringent and a more accurate measure of transit access.
- **Hours of transit service available**, measured by the number of vehicle revenue hours in the transit network. It is also an outcome of the investments and can be tracked over time and estimated for future years.
- **Transit ridership**, or the number of people using the service. Ridership, including the absolute number of people served and change in ridership over time is a logical outcome from transit investments. While the 2035 Wake Transit Plan does not forecast ridership, ridership can be measured historically and growth over time.

Access to Transit

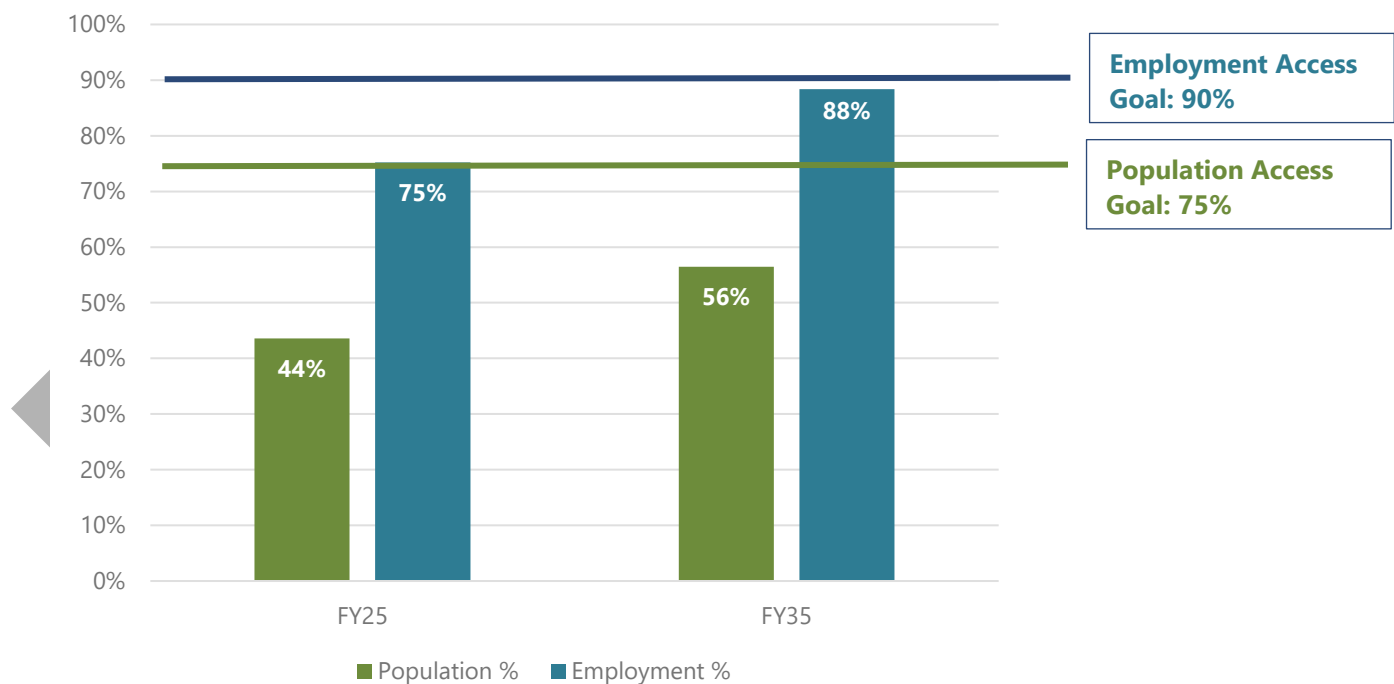
Starting with the 2035 Plan, access to transit will be measured using a more stringent measure that includes a shorter distance (1/2 mile instead of ¾ mile) and accounts for bus stops and the availability of sidewalks (see Figure 20). Setting a higher standard demonstrates continued commitment to improving transit access as an area of Wake Transit investment. It also links transit investments with pedestrian infrastructure improvements such as sidewalks and crosswalks as part of a holistic transit experience, and measure progress accordingly.

Figure 20 Proposed Change from Proximity to Access to Transit

	Current "Proximity to Transit" Measure	Proposed "Access to Transit" Measure
Distance	¾ mile (15–20 minutes walking)	½ mile (10–15 minutes walking)
Distance From...	Transit route or corridor line	Specific bus stops in the transit network
Buffer Method	"As the crow flies" distance from the corridor	Following streets with sidewalks

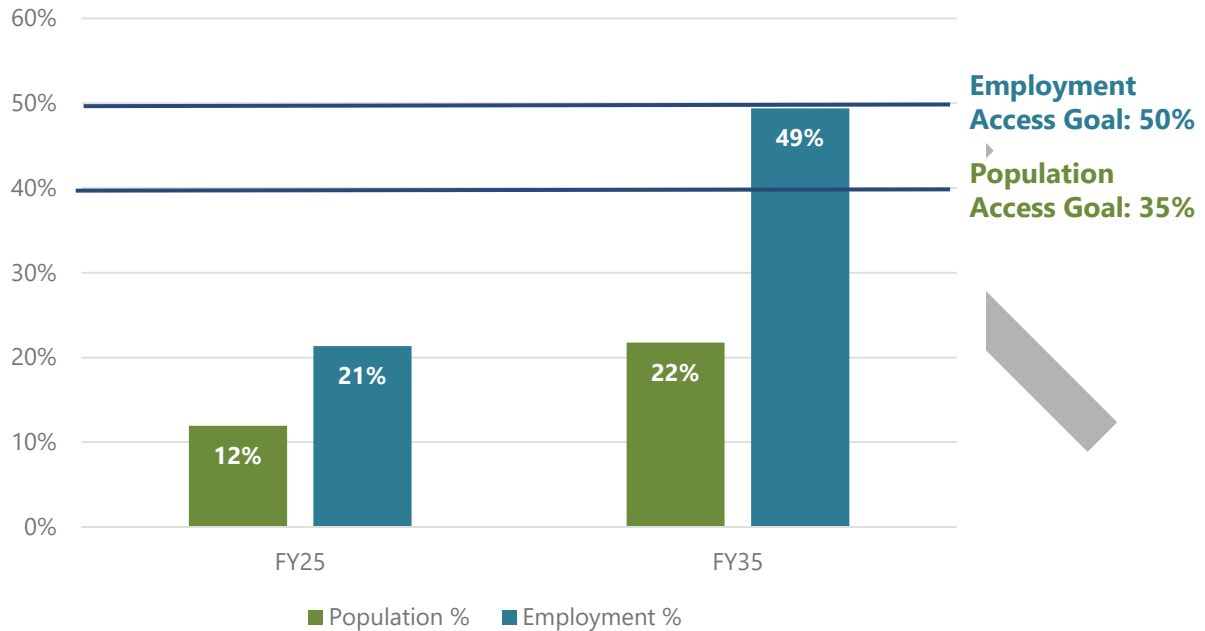
Using the new metric to measure the impact of the 2035 plan on transit accessibility shows an increase in access between 2025 and 2035 for both transit service overall and access to frequent transit (see Figure 21 and Figure 22). Assuming the 2035 WTP is implemented as envisioned, transit investments will exceed the 2016 goals even for employment and meet or nearly meet the goals for population using the more stringent access to transit metric.

Figure 21 Residents and Jobs With ½-Mile Access to Overall Transit Service (Weekdays)



Source: Wake Bus Plan and Wake Transit Plan adapted by Nelson\Nygaard Consulting Associates

Figure 22 Residents and Jobs With ½-Mile Access to Frequent Transit Service (Weekdays)

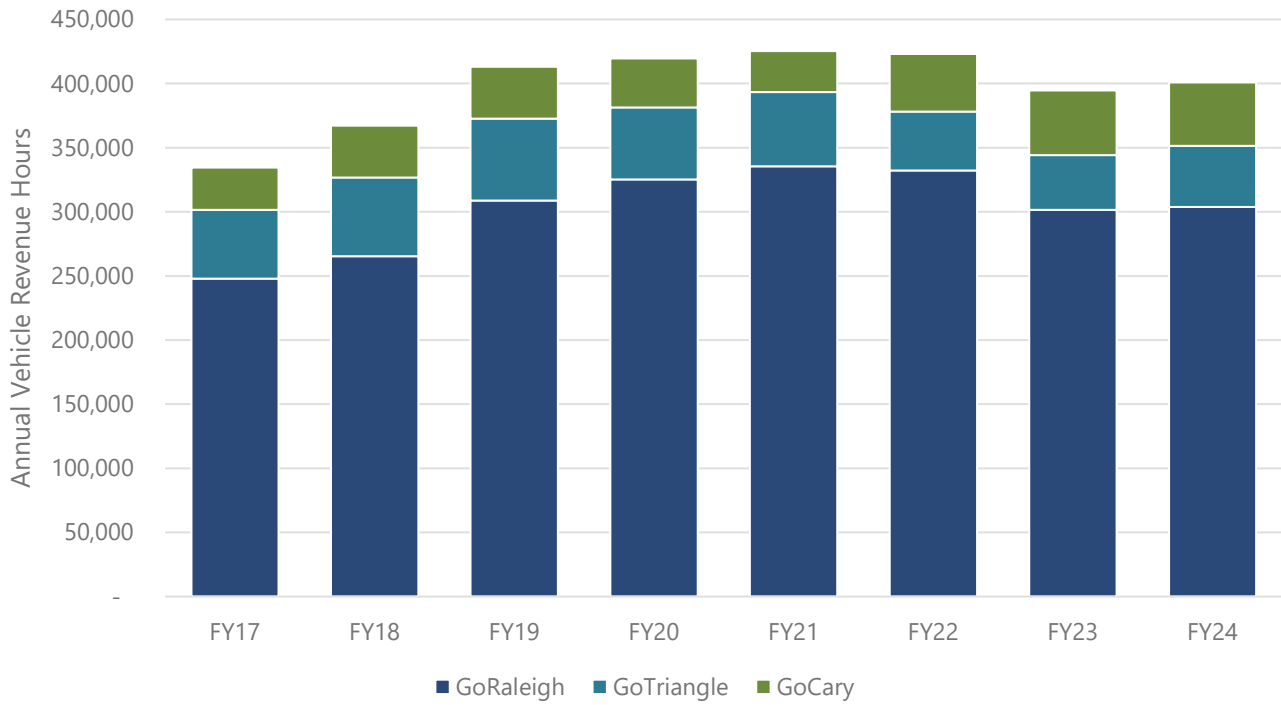


Source: Wake Bus Plan and Wake Transit Plan adapted by Nelson\Nygaard Consulting Associates

Hours of Bus Service

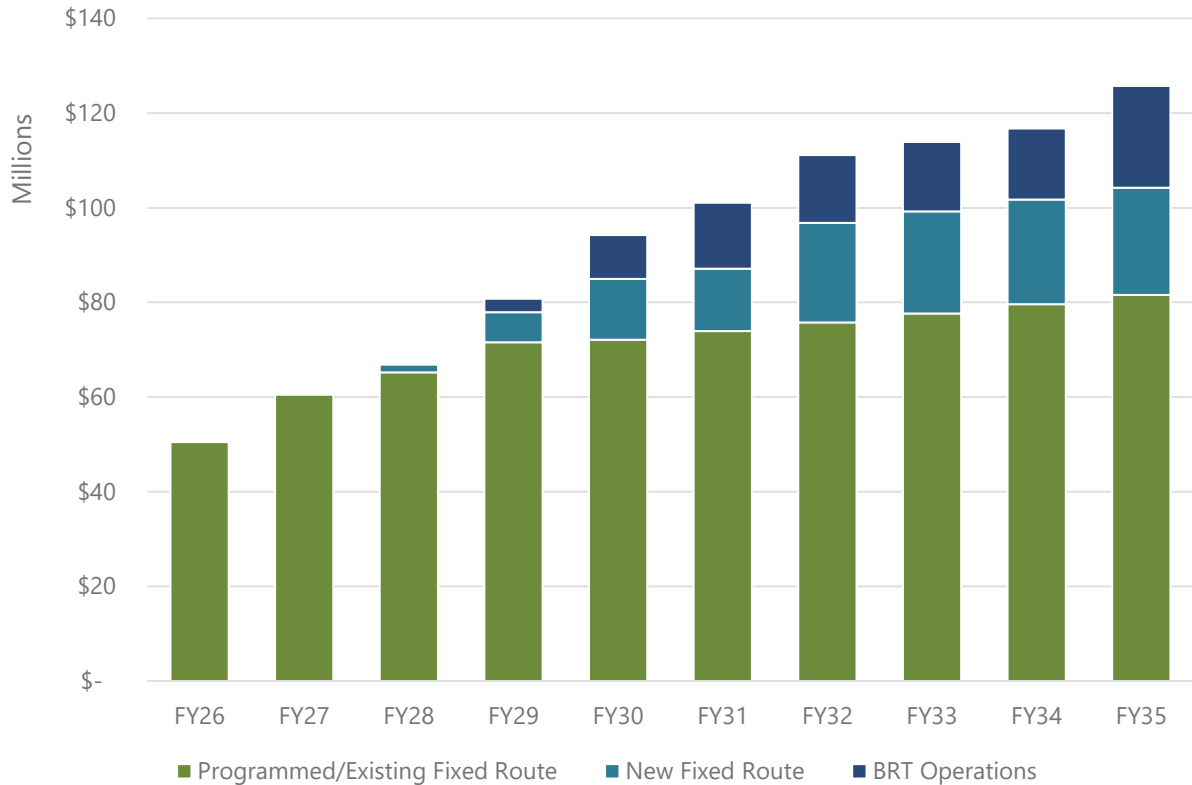
Hours of bus service, measured as vehicle revenue hours (meaning the vehicle is in service and available to pick up and drop off riders) show the overall level of transit service. In FY17, the three transit operators collectively operated 334,372 hours of service over the calendar year; in FY24, the three operators provided 400,921 hours of service, a 20% increase over previous levels (see Figure 23). The 2035 Wake Transit Plan will continue to invest in bus service with a significant increase in existing bus service planned for FY26 and FY27. Growth in bus service will also occur as new bus routes are added to the network and BRT operations begin (see Figure 24).

Figure 23 Annual Vehicle Revenue Hours by Agency, FY17-FY24



Source: Wake Bus Plan adapted by Nelson\Nygaard Consulting Associates

Figure 24 Planned Investment in Fixed-Route Bus Service in Wake County by Year, FY26–FY35



Source: Wake Transit Plan adapted by Nelson\Nygaard Consulting Associates

Transit Ridership

An important outcome from investments in transit service is ridership. Indeed, the return on an investment in more hours of available service, or days of the week, is more ridership.

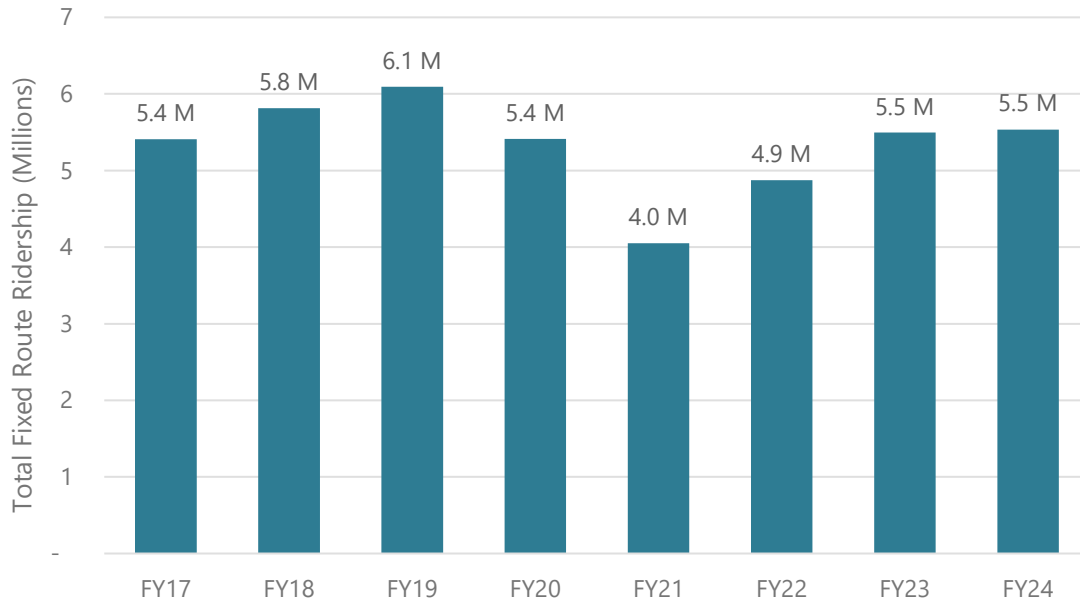
Transit ridership was on a strong upwards trajectory prior to the COVID-19 pandemic, with early investments from the Wake Transit Plan spurring much of the growth. The immediate aftermath of the pandemic – including both changes in travel patterns and driver shortages – impacted transit ridership.

In the past several months, data shows a strong ridership recovery for GoCary, GoRaleigh and GoTriangle. Ridership data shows that people are returning to transit services; the number of transit riders in FY24 is nearly 40% higher than its low point in 2021 and is trending towards the peak achieved in 2019 (see Figure 25).

Total ridership on GoRaleigh in the first ten months of FY25 (through April 2025) has already exceeded the total ridership in FY24, with nearly 650,000 riders in April 2025 compared to

372,000 in April 2024. The 2035 Wake Transit Plan includes continued investment in transit services. While the 2035 Plan does not estimate future ridership, the expectation is that ridership will continue to grow over the 10-year investment period.

Figure 25 Fixed-Route Transit Ridership in Wake County by Fiscal Year, FY17–24



Source: Wake Transit Plan adapted by Nelson\Nygaard Consulting Associates. Includes ridership on GoRaleigh, GoCary and GoTriangle bus routes.

Program Administration

An important success of the Wake Transit Plan is not directly tied to transit service but instead reflects the way the program has been managed and developed over time. The Wake Transit Plan largely focuses on transit network development and over time has increased its consideration of the institutional and organizational structures required to deliver on Wake County's long-term transit vision.

Wake Transit Plan investments in capacity and management include establishing the Wake County Transit Planning Advisory Committee (TPAC), a staff-level stakeholder group that includes representation from the 12 Wake County municipalities and five additional transit stakeholders to oversee and guide transit investments across the county, and a staff person to manage the TPAC's ongoing activities. Other staff employed for WTP implementation include a program manager and coordinator; financial professionals that track, report, and forecast Wake Transit revenues and expenditures; communications and engagement specialists that continuously inform and engage partners and the public; and project-level delivery staff responsible for execution of funded services and projects. New staff and

resources are helping to build and expand the expertise, knowledge, and capacity of Wake County to implement more complicated projects. Tangible outcomes associated with this investment include:

- Complying with the financial rules governing and guiding the Wake Transit Plan since its adoption. This includes adhering to the minimum fund balance requirements and consistently ensuring the Wake Transit Plan can reimburse all funded projects and services.
- Preparing conservative and realistic forecasts of Wake Transit Plan revenues so that the investment program reflects available funding.
- Investing excess and unspent Wake Transit Plan funds wisely so that the fund balance earns revenue but does not put funds at risk.
- Strengthening the credit rating and scoring of the Wake Transit Plan. This accomplishment is important if/when Wake County opts to finance capital investments because it will ensure borrowed funds are eligible for attractive financing rates.
- Working with transit agency partners to leverage non-Wake Transit Plan funds to help fund projects and services. Wake County transit agencies have successfully attracted nearly \$200 million from the federal government to help fund Wake Transit Plan investments.

Despite success, there are challenges, needs and opportunities facing the Wake Transit Plan's organizational and management systems and structures. Future metrics and measures of success may work to capture these goals:

1. **Improve project delivery.** Wake Transit partners and staff members have gained success and experience as the team advances multiple projects across a broad range of investment types. There are opportunities to capitalize on this experience and improve project delivery, specifically implementing projects faster, on time and within planned budgets. Setting up methods to capitalize and leverage recent knowledge will become increasingly important as the county simultaneously undertakes several major capital projects.
2. **Focus on the largest, most important projects.** The 2035 WTP includes \$1.8 billion in capital investments, about half of which is for projects already started and half for new projects. As planned projects move into final design and from design to construction, oversight of these projects is essential for success. Strategies may include setting up a set of checks and balances to control costs, reward schedule adherence and encourage ongoing status updates to set the stage for continued fiscal integrity.

3. **Creating an integrated and coordinated transit network.** As the Wake Transit Plan matures, success will require more emphasis on regionalism for Wake County to leverage and receive benefits of transit investments. The focus on regionalism also reflects investment levels, as funding provided by WTP exceeds resources contributed by local partners. Opportunities to create network integration include strategies related to unified passenger systems (fares, signage, information, and apps), shared facilities, including both passenger facing and back of house facilities, and more integrated services.

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