

2035 Wake Transit Plan

October 2025



Table of Contents	i
1 Foreword/Introduction	1-1
Recommendations Summary	1-3
Report Organization	1-5
2 Recommendations	2-6
Introduction	2-6
Big Moves: Enhanced Transit in, to and through Wake County	2-6
Big Move: Connect the Region	2-8
Big Move: Connect All Wake County Communities	2-11
Big Move: Frequent, Reliable Urban Mobility	2-14
Big Move: Enhanced Access to Transit	2-18
3 Developing the 2035 Wake Transit Plan	3-20
Background	3-20
Plan Implementation	3-21
Plan Implementation Governance	3-22
Annual Wake Transit Work Plans	3-22
Implementation Planning to Date	3-22
Transit Markets and Needs	3-23
Current and Future Transit Demand	3-24
Suburban Growth and Development	3-29
Opportunities	3-31
Public and Stakeholder Input	3-32
Phase 1: Goals and Priorities	3-33
Phase 2: Evaluating Scenarios	3-35
Phase 3	3-36
4 Trade-Offs, Outcomes, and Policies	4-38
Overview	4-38
Investment Trade-Offs	4-39
Network Development	4-40
Policy Development	4-44
Capital Reserve Fund	4-44
Microtransit	4-45
Proximity and Access to Transit	4-46
Investments/Changes from Previous Plans	4-47
Project Prioritization Guidance	4-48
5 Financial Plan	5-49
Overview	5-49
Revenue	5-49
Expenditures	5-51
2035 WTP Expenditures	5-52

6	Outcomes: Measuring and Tracking Success.....	6-54
	Overview.....	6-54
	Measuring and Tracking Success.....	6-55
	Transit Investments.....	6-55
	Access to Transit	6-56
	Hours of Bus Service.....	6-58
	Transit Ridership.....	6-60
	Program Administration.....	6-61

Appendix A: Market Analysis

Appendix B: Engagement Summary

Appendix C: Community Funding Area Program Management Plan

Appendix D: Microtransit Guidelines

Appendix E: Project Prioritization Guidance

Table of Figures

Figure 1	2025 Wake Transit Plan FY2026-2035 10-Year Investment Strategy	1-5
Figure 2	2035 WTP: Summary of Planned Investments by Big Move	2-7
Figure 3	2035 Proposed Regional Network	2-10
Figure 4	2035 Proposed Local and Regional Bus Routes	2-13
Figure 5	2035 Proposed Frequent Bus Network	2-17
Figure 6	Enhanced Access to Transit	2-19
Figure 7	Composite Transit Demand in 2020	3-26
Figure 8	Composite Transit Demand in 2040	3-27
Figure 9	Population in Transit Supportive Areas – Change from 2020 to 2040	3-28
Figure 10	Jobs in Transit Supportive Areas – Change from 2020 to 2040	3-28
Figure 11	Transit Supportive Land Acreage in Wake County – Change from 2020 to 2040	3-28
Figure 12	Recent and Planned Development in Wake County Towns	3-30
Figure 13	Investment Priorities of Transit Riders in Wake County – Phase 1 Engagement Survey	3-34
Figure 14	CFA Program Grant Funding Awarded per Fiscal Year	4-43
Figure 15	Residents and Jobs Within $\frac{3}{4}$ Miles of All-Day Transit	4-46
Figure 16	Residents and Jobs Within $\frac{3}{4}$ Miles of Frequent Transit	4-47
Figure 17	Proposed Change from Proximity to Access to Transit	4-48
Figure 18	Wake Transit Plan Revenues Sources by Year (FY17 – FY24)	5-50
Figure 19	Wake Transit Plan 2035 10-Year Investment Strategy	5-53
Figure 20	Proposed Change from Proximity to Access to Transit	6-56
Figure 21	Residents and Jobs With $\frac{1}{2}$ -Mile Access to Overall Transit Service (Weekdays)	6-57
Figure 22	Residents and Jobs With $\frac{1}{2}$ -Mile Access to Frequent Transit Service (Weekdays)	6-58
Figure 23	Annual Vehicle Revenue Hours by Agency, FY17-FY24	6-59
Figure 24	Planned Investment in Fixed-Route Bus Service in Wake County by Year, FY26–FY35	6-60
Figure 25	Fixed-Route Transit Ridership in Wake County by Fiscal Year, FY17–24	6-61

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:



1. Connect the Region



2. Connect All Wake County Communities



3. Create Frequent, Reliable Urban Mobility



4. Enhance Access to Transit

The original Wake County Transit Plan, adopted in 2016, programmed a total investment in transit expansion of approximately \$2.3 billion in the first 10 years of implementation, from 2018 through 2027. The primary funding source for these investments is a half-cent sales tax increase that was approved by voters in November of 2016. The transit revenue package also includes additional taxes, such as vehicle registration and vehicle rental tax revenues. Regional transit investments identified in the Plan were also supported by federal and state funding programs, local revenues that were invested in Wake County's pre-existing transit services, and fares paid by passengers.

The first update to the Wake County Transit Plan, completed in 2021, was not a wholesale re-visioning of the transit investments envisioned in the original 2018-2027 plan, and it extended the financially constrained horizon of the Plan an additional three (3) years through 2030. While the plan update revisited certain project delivery assumptions for new investments identified in the original Wake County Transit Plan, as well as market assumptions that drive transit propensity and that have the effect of redirecting priorities for planned investments, the plan update did not change the overarching goals that drive the four Big Moves established in the original plan. Substantial investment and expansion in transit service has occurred in Wake County since 2017 due in large part to the Wake Transit Plan.

The 2035 Wake Transit Plan is the second update to the Plan but is the first regular update extending the financially constrained horizon of the Plan a full five (5) years to 2035. Like the 2021 Plan, the 2035 Wake Transit Plan has kept the Four Big Moves as illustrative goals from the original Plan and has re-examined some of the proposed investments to update costs and timelines. The 2035 Plan used information from Feasibility Studies conducted on the planned Commuter Rail system to recommend investing Wake Transit funds in Regional Rail instead. While the 2035 Plan includes some new bus services and infrastructure, it does not recommend many new major investments, instead focusing on completing the major investments identified in the original Plan and the 2021 Plan update.

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 counties of its size in the United States. In 2024, the U.S. Census Bureau 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.

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 assumptions include funds directly raised by the voter-approved sales tax, a portion of the regional vehicle rental car tax revenue¹ and increases in vehicle registration taxes, as

¹ The portion of the Regional Vehicle Rental Car Tax Revenue attributable to Wake Transit continues to be under discussion by the Wake Transit Conference Committee formed in the Spring of 2024. If there is a decision by the Conference Committee to remove or amend the revenue assumptions for the portion of the vehicle rental tax attributable to Wake County, an amendment to this Plan will be required.

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 Fiscal Year 2026 and Fiscal Year 2035. For Wake Transit, a Fiscal Year is different from a Calendar Year: Wake Transit Fiscal Years run from July 1st to June 30th and is the period of time a given year's budget covers. For example, Fiscal Year 2026 begins on July 1 and ends on June 30, 2026. While there is a substantial amount of revenue expected to be raised over the next 10 years, there are a lot of capital projects, such as Bus Rapid Transit, new maintenance facilities and new transit stations, that have been programmed in previous versions of the Plan but have not yet been constructed. Due to this, the 2035 Wake Transit Plan is heavily focused on completing the capital projects that have been programmed, while adding new capital projects and bus service where possible with the remaining funds.

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 of existing operating projects. These projects include fixed-route bus services, some of the new Bus Rapid Transit services, on-demand general public trips, paratransit services and the Community Funding Area (CFA) Program.
 - \$831 million will be used for capital projects, such as vehicle acquisition, building Bus Rapid Transit (BRT) corridors, building bus maintenance facilities and building 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, including operation of some of the Bus Rapid Transit services identified in the Plan, will utilize about \$166 million of this budget.
 - New 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

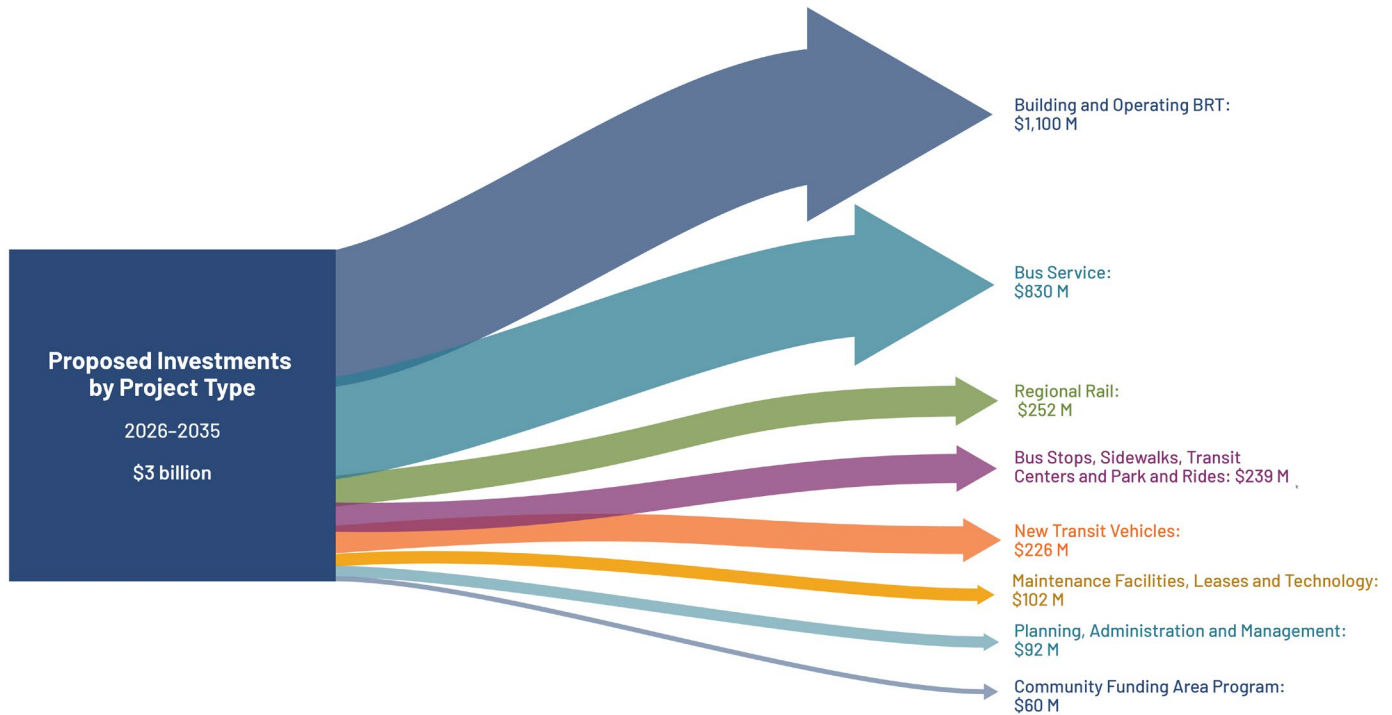
new BRT corridors, buying and repowering vehicles, and improving passenger access to services and comfort at transit facilities.

- \$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 Wake Transit Plan (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 study two new Bus Rapid Transit (BRT) services for potential implementation by 2035: a BRT service on I-40 connecting downtown Raleigh to Research Triangle Park, and a BRT service on the Harrison Avenue and Kildaire Farm Road corridors between I-40 and US 64 in Cary.

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 Strategy²



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.

² 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** 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 will also be held in reserve.

Investments in planned and programmed 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 in, 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. Bus service investments identified on the Big Moves maps fall under one of the following categories:

- **Planned:** Funding has been identified and programmed for this service in previous Transit Plans, and this service should be in operation by 2035.

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- Existing/Planned: Funding has been programmed or allocated for this service in prior Transit Plans, and the service may already be in operation. If the service is not in operation, it is expected to be in operation before 2035.
- Potential: New services identified and funded in the 2035 Wake Transit Plan. Potential services will require either additional study (such as the new BRT services) or will be prioritized and programmed through the 2035 Wake Bus Plan. Not all services identified as potential will be implemented by 2035 due to funding constraints.

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

Big Move	Proposed 2035 Investments
Connect the Region 	▪ Invest in the rail network through partnering with NCDOT and other agencies to expand or enhance passenger rail projects. ▪ Establish BRT services with connections from Cary to RTP and Garner to Clayton. ▪ Study and potential implementation of new BRT service on one of two proposed corridors: I-40 between Raleigh and RTP or along the Harrison Boulevard and Kildaire Farm Road corridor between I-40 and US 64 in Cary.
Connect all Wake County Communities 	▪ Expand local and regional transit options to provide all day service. ▪ Connect every town to Cary, Raleigh and/or RTP. ▪ Expand local bus services so more towns are connected to each other. ▪ Invest in up to 5 new community transportation hubs.
Create Frequent Reliable Urban Mobility 	▪ 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. ▪ Implement Wake Transit Plan "core" BRT routes (New Bern, Southern, Western and Capital) ▪ Plan and design next generation of BRT corridors in Wake County
Enhance Access to Transit 	▪ Invest at least \$3 million a year to improve bus stops, sidewalks, and crosswalks. ▪ Triple the size of the Community Funding Area program to invest more in individual communities. ▪ Invest in programs that make transit affordable.

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 Johnston). 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.
- Study and potential implementation of one of two new potential BRT services: I-40 between Raleigh and Research Triangle Park (RTP), providing a direct connection between downtown Raleigh and Research Triangle Park via the Lenovo Center and Raleigh-Durham International Airport (RDU); or BRT service in Cary along the Harrison Avenue/Kildaire Farm Road corridors between I-40 and Tryon Road/Regency Park, serving the SAS campus, downtown Cary, Wake Med Hospital and Regency Park. The I-40 BRT service was identified through the 2035 WTP development as a potential replacement for the Commuter Rail service previously planned, and the Cary BRT service has been identified in the region's Metropolitan Transportation Plan, which identifies transportation investments to be implemented over the next 30 years.

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) will be funded to study the proposed I-40 BRT service

and the proposed Cary BRT³ service, recommending which of the two services should be implemented first, with a goal of operating the service by 2035. 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. There is existing service along the I-40 corridor operated by GoTriangle (Route 100) that, in FY26, has funded frequency improvements to provide 15-minute frequency on weekdays until 7pm. The MIS will also examine whether this service addresses the same needs as the potential BRT service, or if it should be further improved or replaced with BRT service. The MIS will include investigation of additional infrastructure that may be required for the Route 100 15-minute service in addition to the level of infrastructure needed for BRT service on the I-40 corridor.

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. Any Wake Transit investment in Regional Rail should have a direct and quantifiable benefit to the existing or proposed transit network. Additional study may be necessary to determine how Wake Transit will consider and prioritize funding for Regional Rail investments.

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 (see Chapter 4 for more information). 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.

³ A potential Harrison Avenue-Kildaire Farm Road BRT service would connect the I-40 corridor (and potential BRT route) with downtown Cary traveling on Harrison Avenue, connecting south to the Regency Park area near Tryon Road and US 64, traveling on Kildaire Farm Road.

BIG MOVE: CONNECT THE REGION

Key Projects:

- Study feasibility of potential BRT service and infrastructure investments on I-40 with an airport transfer hub to connect Raleigh with RTP and RDU. This study will also include study of the feasibility of potential BRT service in Cary.
- BRT extensions connecting Garner and Clayton and Cary and RTP.
- Investment in existing and planned regional rail service.

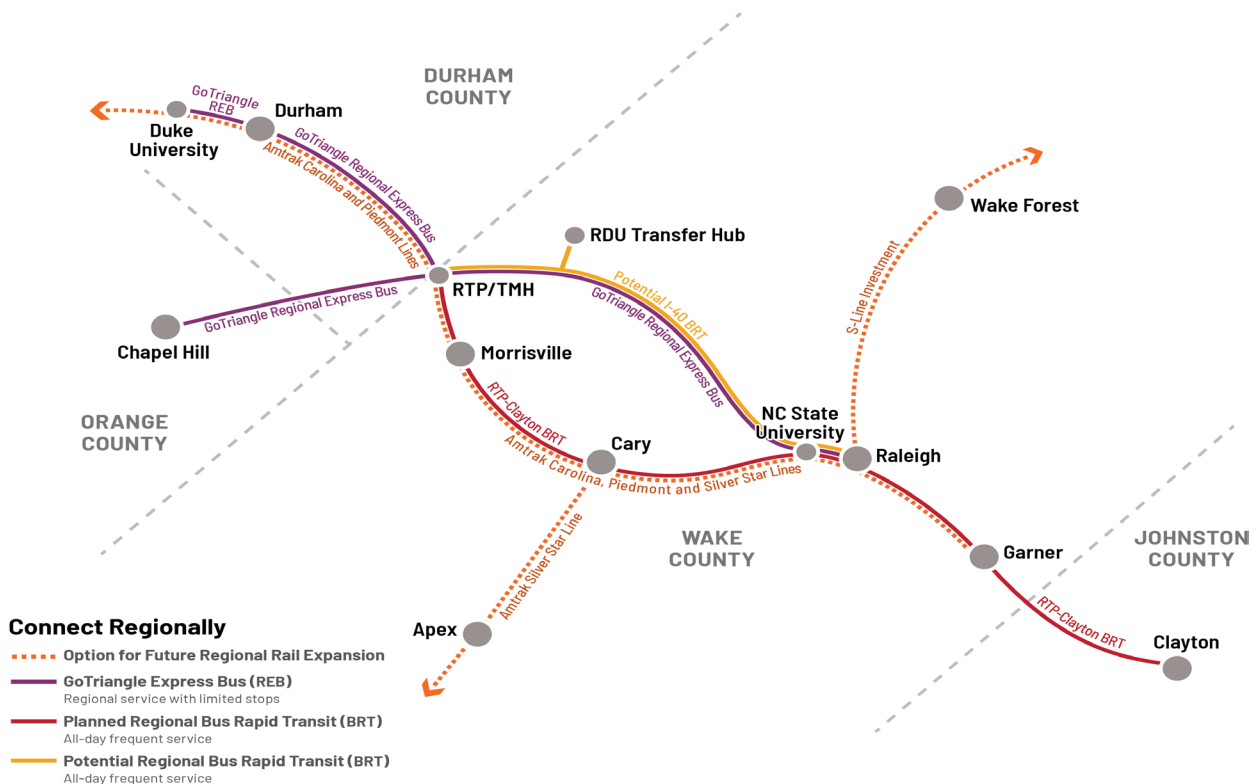
Transit Plan Updates:

- Network of regional 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 goals faster and more cost effectively 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 fixed-route transit system. In the 2035 Plan, this goal has been expanded so each community will connect with local transit service, microtransit service, or all-day regional transit service to create access to jobs and services and enhance 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 (employment, educational or service centers) 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. These community transportation hubs were identified as way to provide additional transit infrastructure in the outlying communities of Wake County and provide a location where transit riders can transfer between local and regional transit and other transportation modes. The location, design, scale, and amenities of the proposed hubs will be determined through the Wake Transit Bus Plan and additional study and planning work coordinated with individual communities. Community transportation hubs could include one or more transit stops for connecting between fixed route services, or between fixed route and microtransit services; dedicated location(s) for micromobility solutions (e.g. bike or scooter-share programs); park-and-ride facilities; regional rail stop; or dedicated locations for ride-share services (e.g. Uber or Lyft). Depending on the scale of the hubs, they may include one or more buildings or may only include bus shelters.

While projects prioritized for implementation are identified in the 2035 Wake Transit Plan (see Figure 4), the implementation schedule of specific investments (e.g., which route gets added first) was not determined in this plan; these decisions will be determined through the 2035 Wake Bus Plan 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 networks.
- Town-to-town connections will be established where feasible and needed.
- All-day local service options will be enhanced with weekday span and/or frequency improvements and new weekend service where feasible.
- Development of up to 5 new community transportation hubs.

Transit Plan Updates:

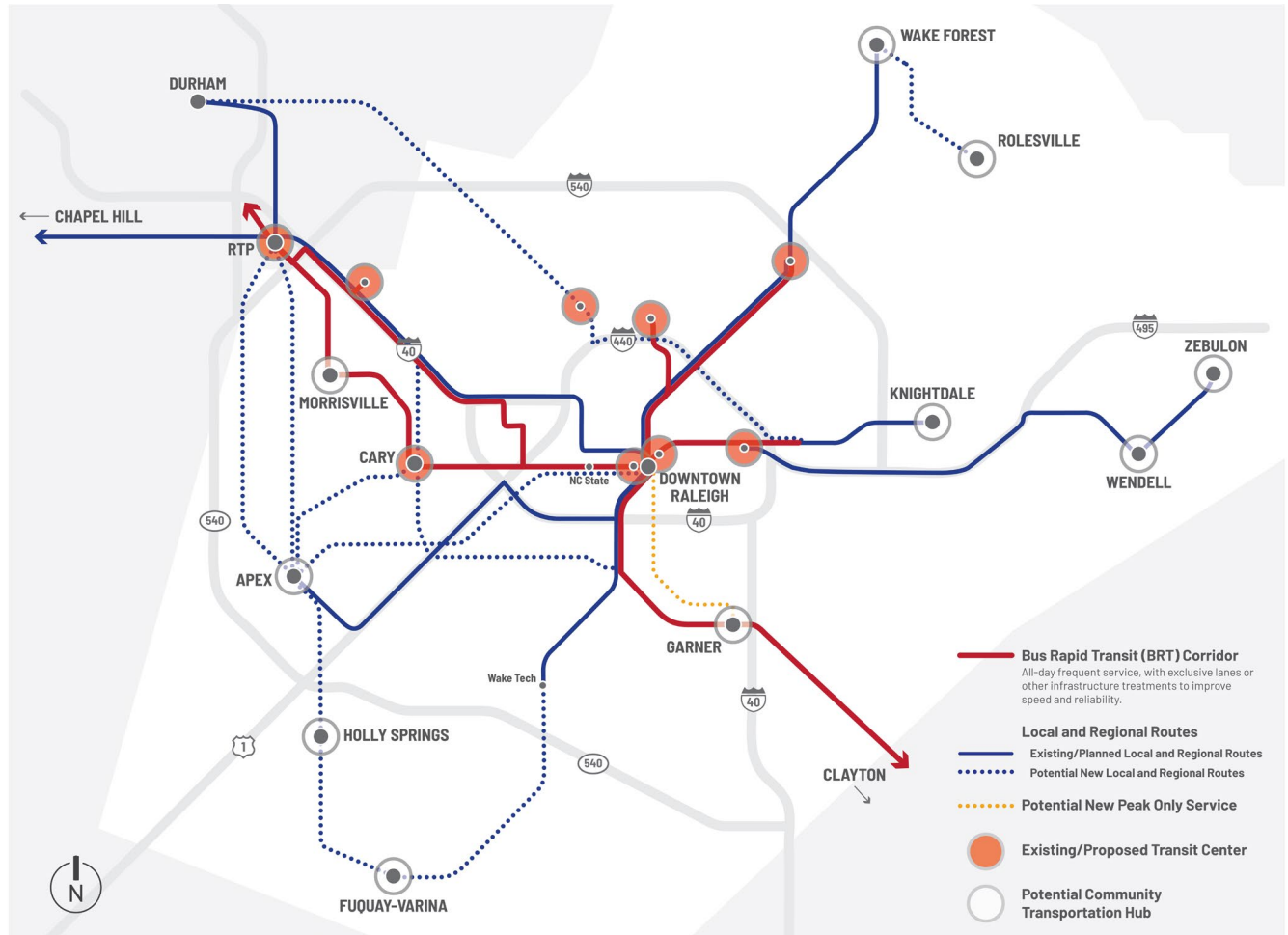
- As many regional/local routes as possible will operate all day, every day by 2035—some routes may have weekday-only service depending on funding constraints.
- More local, all-day transit service established.
- Some existing routes will be replaced by more effective and efficient services.

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.

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Figure 4 2035 Proposed 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 branches 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. The Plan will fund planning studies for the next generation of BRT corridors, with the goal of positioning one or more of these corridors to be funded for implementation after 2035 – the Plan does not fund construction or operation for these next generation corridors. In total, the 2035 WTP invests roughly \$1.0 billion to complete the construction of the BRT corridors identified in previous versions of the Plan, to study and potentially implement one new corridor by 2035 and conduct planning studies on the next generation of BRT corridors for implementation after 2035.
- 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 standard of running 15 minutes or better frequency for at least 12 hours a day on weekdays, creating over 200 new miles of additional frequent service.

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 is defined as a bus route that arrives at a bus stop at least once every 15 minutes. 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 and has been emphasized in feedback from the public (especially current transit riders). 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 to include 195 new miles of additional frequent service, including 65 miles of core BRT service, bringing the frequent service network mileage up to a total of 304 miles.

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 18 hours a day on weekdays and Saturdays and for 17 hours on Sundays with frequent service available for at least 12 hours a day.
- Increase frequent bus network by 195 miles, from 109 miles to 304 miles, including 65 miles of BRT service.
- Improve and/or build at least 10 transit stations or transfer points where bus routes meet – these will be further identified and prioritized in the 2035 Wake Bus Plan.

Transit Plan Updates:

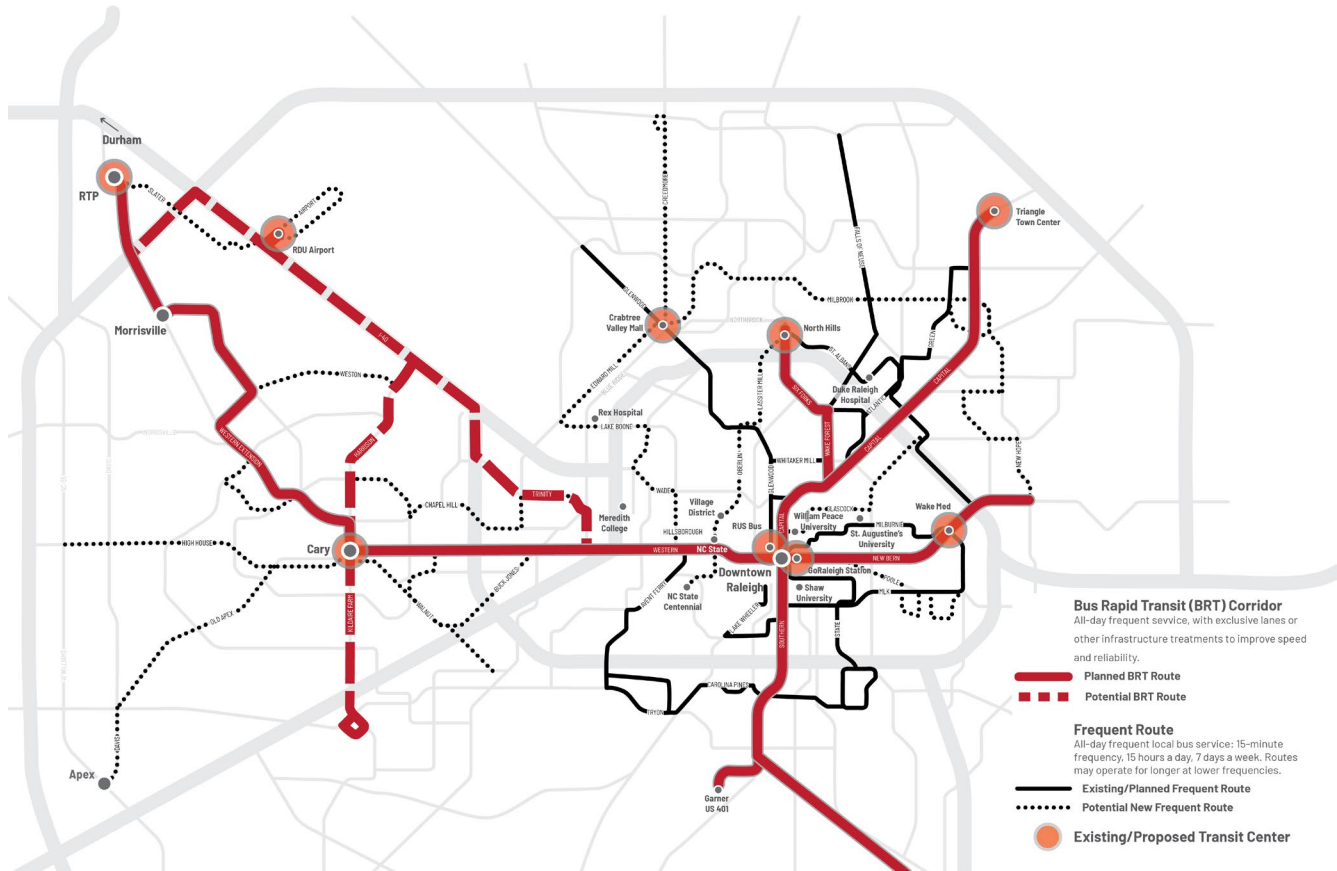
- Expanded frequent service miles from 17 to 109 miles between 2017 and 2024, adding 195 additional miles to the frequent service network by 2035.
- Major Investment Study and potential implementation of at least one new BRT service – I-40 from Raleigh to Durham and/or the Harrison Avenue/Kildaire Farm Road corridor in Cary.

Key Benefits:

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

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Figure 5 2035 Proposed Frequent Bus Network



Existing/Planned Frequent Routes are routes that have been funded in the 2021 Wake Transit Plan for frequent service (minimum frequency of 15 minutes for 12 hours a day).

Potential New Frequent Routes are routes that will be studied and prioritized for frequency improvements matching the Frequent Network Standard (minimum frequency of 15 minutes for 12 hours a day) in the 2035 Wake Bus Plan.



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 and locally oriented services like microtransit.
- Investing in sidewalk and crosswalk connections to transit facilities. While these improvements are included with many bus stop and transit facility projects, the 2035 WTP has set aside approximately \$3 million per year for additional investments to enhance access to transit. This amount was based on existing budgets, available resources in the transit agencies for this work, and the financial constraints of the Plan.
- 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.
- Continuing to support access to transit with funding for transit fare pass programs, which make transit affordable for more people.
- Expanding the Community Funding Area (CFA) 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 received 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 transfer points (where two or more bus routes intersect) to support new services will be identified and scheduled over the next 10-year period.

BIG MOVE: ENHANCED ACCESS TO TRANSIT

Key Projects:

- Invest at least \$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% for operating and capital projects.
- Build new and improved transit centers, transfer points and community transportation hubs.

Transit Plan Updates:

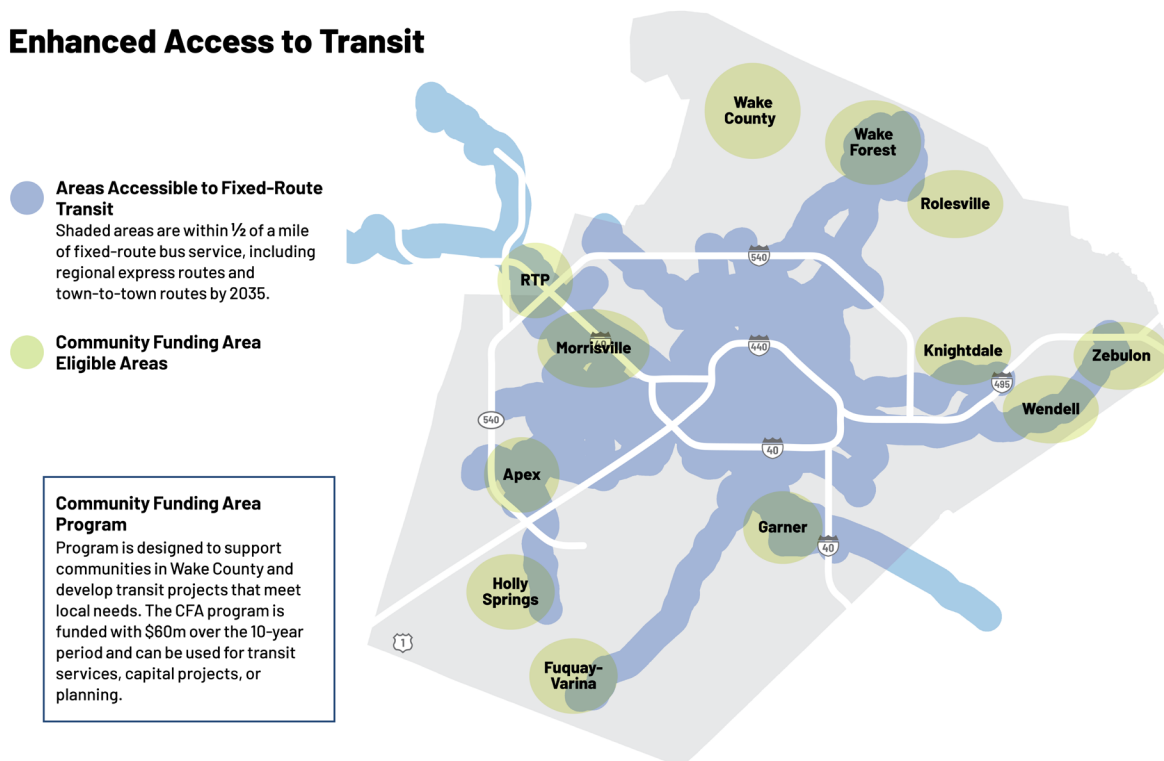
- Where feasible and practical, bus stops for all providers in Wake County will be ADA compliant by 2035.
- As of 2025, the CFA Program has funded 15 local transit projects with \$6.4 million provided to eligible partners. \$60 million is being set aside for operations and capital projects through FY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

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 and forecasts, review the project delivery schedules, 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.

As part of developing the original Wake County Transit Plan, community leaders reserved opportunities for stakeholders and residents to revisit their priorities for transit investments based on progress to date, changes to underlying assumptions, and/or changes in community priorities and values, particularly as the plan is continually updated every four (4) years to consider additional investment beyond the original 10-year horizon. This update to the plan is the second of these opportunities. It reflects an 18-month planning process that reassessed the underlying assumptions for transit investments included in the original Wake County Transit Plan, development patterns, investment priorities, and available funding. The planning process also reconsidered the appropriate trajectory of project implementation within the context of the region's seven (7) years of experience implementing the Wake County Transit Plan. With these goals in mind, the Wake County Transit Plan Update followed an effort focused on six (6) themes:

1. Extending the Wake County Transit Plan's investment schedule to 2035, five (5) years beyond the last plan horizon that ends in 2030.
2. Updating the transit market analysis to reflect the region's understanding of the demand and need for transit services based on the most recent demographic, socioeconomic, and transportation data (travel patterns, congestion, transit ridership, and intersection density). More information is included later in this Chapter and in **Appendix A: Market Analysis**.
3. Re-evaluating the proposed Commuter Rail investment, based on the completed Feasibility Studies and work of the CAMPO Rail Subcommittee. Substantial public and stakeholder input was received in the first two public engagement phases regarding the region's desire for rail investment from Wake Transit.
4. Updating and re-evaluating the schedule and cost feasibility of major capital projects associated with the Wake Transit Plan's Bus Rapid Transit investments. This process updated

assumptions for project costs and implementation schedules within the context of impacts to the overall financial capacity of the Wake County Transit Plan.

5. Revisiting stakeholder and community priorities for transit service and infrastructure investments. More information is included in **Appendix B: Engagement Summary**.

6. Evaluating new capital and bus service investments based on the financial capacity of the Plan and input from the community and stakeholders.

The Capital Area Metropolitan Planning Organization (CAMPO), working closely with a number of local government, state, and transit agency partners, led the development of the update to the Wake County Transit Plan. It was guided by a Project Management Team (PMT), comprised of representatives from the Wake Transit Lead Agencies, and a Core Technical Team (CTT) comprised of representatives from individual Wake County municipalities, local and regional transit agencies, North Carolina State University, and other regional stakeholders. The team also engaged members of the public and regional stakeholders to comment on progress to date, consider and evaluate priorities, and weigh in on investment decisions.

PLAN IMPLEMENTATION

Wake County is served by five (5) independent public transit providers: GoCary (operated by the Town of Cary), GoRaleigh (operated by the City of Raleigh), GoTriangle, GoWake Access (operated by Wake County), and North Carolina State University's Wolfline service. The Wake County Transit Plan brought the public transit agencies together and encouraged collaboration and cooperation through a shared transit investment plan, revenue stream, and implementation schedule. While each of the public agencies continue to conduct their own transit planning and community engagement, they also collaborate and coordinate on both transit planning and community engagement strategies with regards to refining and advancing the Wake County Transit Plan. The 2035 WTP, like the previous Wake Transit Plans, will follow the implementation processes below to implement the proposed capital and service improvements recommended in Chapter 2. This includes starting the 2035 Wake Bus Plan following adoption of the 2035 WTP, and funding planning studies to further evaluate new capital projects, such as the new BRT services and Regional Rail investments. The 2035 Wake Bus Plan will evaluate and prioritize the proposed transit service investments identified in the Connect All Wake County Communities and Create Frequent, Reliable Urban Mobility Big Moves, as well as the proposed community transportation hubs and investments in bus stops, sidewalks, crosswalks and transit facilities.

Plan Implementation Governance

Along with the adoption of the original Wake County Transit Plan in 2016 was the simultaneous adoption of a structure that would govern the ongoing implementation and management of the plan. This structure was institutionalized through an interlocal agreement executed among CAMPO, Wake County, and the Research Triangle Regional Public Transportation Authority (GoTriangle). The interlocal agreement created the Wake County Transit Planning Advisory Committee (TPAC), which is a 22-member staff-level advisory committee comprised of representatives from all transit agencies and local governments with jurisdiction in Wake County. The TPAC is charged with coordinating planning and implementation aspects of the Wake County Transit Plan, such that all investment decisions made using local revenues that support the plan are reviewed and vetted by the TPAC before they are forwarded to the CAMPO and GoTriangle governing boards. The interlocal agreement made the CAMPO and GoTriangle governing boards responsible for ongoing technical and financial decisions related to plan implementation.

Annual Wake Transit Work Plans

Wake Transit Work Plans are the vehicle created by the interlocal agreement for more detailed and immediate transit plan investment decisions to be made and are created and considered on an annual basis. Annual Wake Transit Work Plans are created by the TPAC in cooperation with two lead agencies, CAMPO and GoTriangle, assigned to manage and coordinate the overall implementation of the plan and to guide investment decisions. Work Plans are comprised of annual operating and capital budgets for transit investments, updates to financial assumptions guiding the solvency of the plan, multi-year operating and capital programs guiding the planning for investments to be made in future years, and project-level agreements. These Work Plans are substantially developed and are released for public review and comment every winter preceding the ensuing fiscal year that they are intended to cover. Feedback received through the public review process is considered and incorporated into a final Work Plan that is recommended by the TPAC and considered for adoption by the CAMPO and GoTriangle boards in the spring and early summer of each year. Annual Wake Transit Work Plans have been produced and adopted each fiscal year since FY 2018, and the Work Plan development, review, and adoption process is anticipated to continue through the years covered by this plan update.

Implementation Planning to Date

The interlocal governance agreement also charged the TPAC and its supporting lead agencies with the development of a number of deliverables designed to flesh out more granular implementation details for the transit plan. These include, but are not limited to:

- A bus service implementation and capital improvements plan to strategically phase bus service expansion investments recommended by the transit plan (The Wake Bus Plan);

- Alternatives analyses and feasibility studies (i.e., major investment study) for major capital investments (such as BRT corridors and commuter rail corridor) that have been identified in the transit plan;
- A program management plan to establish policy and to govern the administration of a Community Funding Area Program that provides transit funding assistance to municipalities in Wake County outside of Raleigh and Cary;
- A public engagement policy to guide and coordinate efforts to engage the Wake County community in making ongoing investment decisions;
- A project prioritization policy to guide investment decisions over the course of plan implementation;
- Periodic updates to the Wake County Transit Plan; and
- A verification of compliance process for implementation of significant infrastructure projects to manage risks associated with interjurisdictional requirements and interests.

These implementation planning and program management tools were developed shortly after adoption of the original transit plan and have been put to substantial use in the years since. Further, various agencies designated as project sponsors to deliver the investments included in the transit plan have undertaken further project-specific planning to better define projects, understand their cost and schedule feasibility, identify risks, and position them for delivery. This includes additional feasibility study and alternatives analyses for BRT, commuter rail, transit centers, and other facilities. Results from multiple years of plan implementation to date that have been guided by this range of deliverables have heavily informed the direction of investment recommended by this Wake County Transit Plan Update as further described in Chapter 2.

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 2030 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, 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 areas⁴ between 2020 and 2040. Key findings from this analysis are summarized below:

- Development in Wake County continues to align with low-density, suburban style land uses.
 - Population density is highest in Raleigh and parts of downtown Cary.
 - Jobs and employment density are concentrated in downtown Raleigh and Cary, Research Triangle Park (RTP), and along major roadways. Service and retail jobs tend to be concentrated in downtown areas and near North Carolina State University, while office jobs are concentrated in and around RTP.
- Transit need based on socioeconomic factors is strongest in the City of Raleigh, especially neighborhoods south and east of downtown.
- 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.

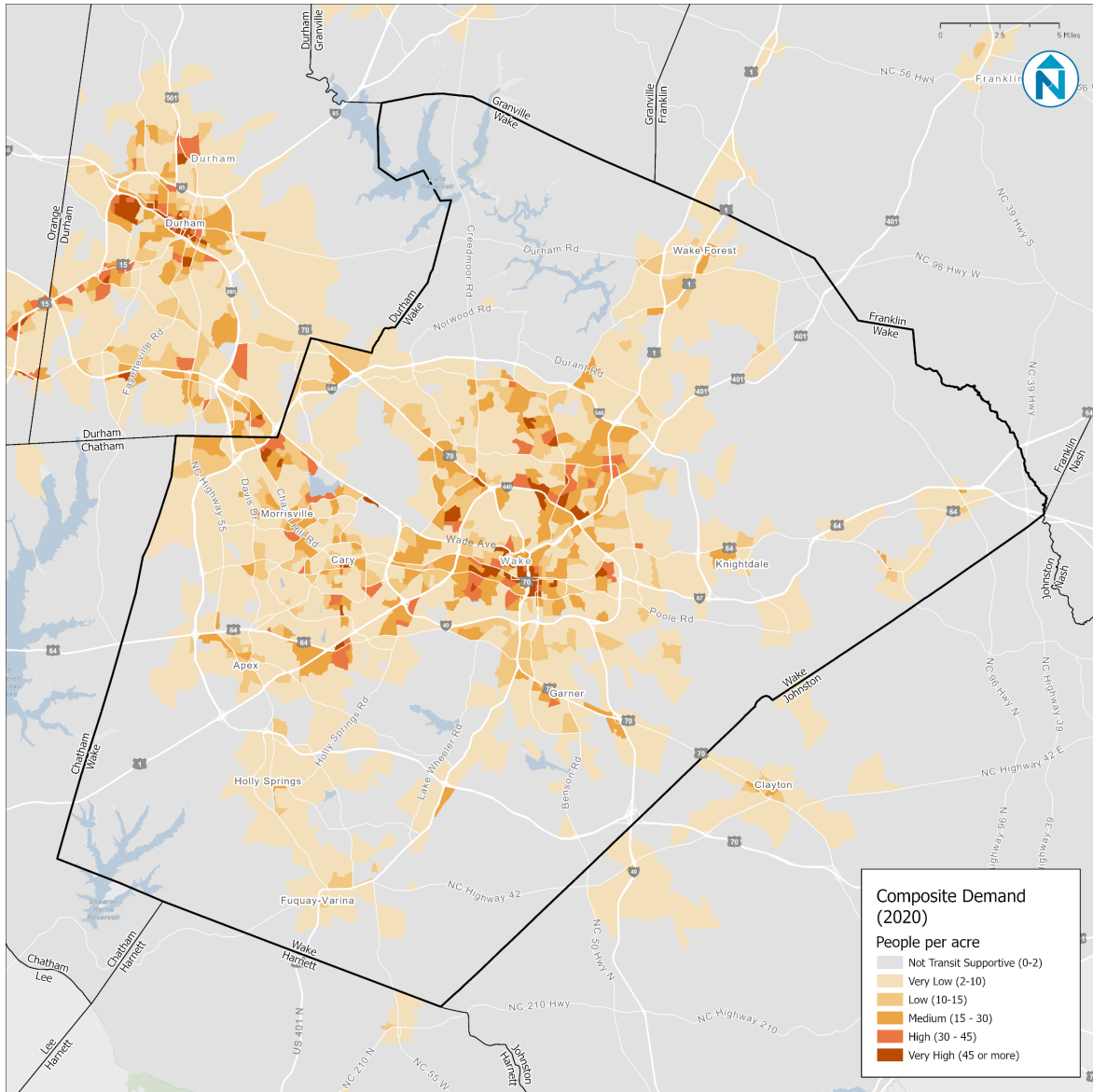
⁴ Transit supportive areas were identified through the Market Analysis, by conducting a transit demand analysis using the following components: population density, employment density, transit propensity index (based on socioeconomic characteristics) and job type adjustment (based on difference in transit demand generated by different job types). This analysis resulted in the composite demand maps in Figures 7 and 8. More detail is provided in Section 2 of the Market Analysis (Appendix A).

- 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 fixed-route transit or microtransit service. Roughly 4% of the land area will support frequent transit service, as compared to 1% in 2020. While a large increase, forecasts suggest that Wake County will continue to sprawl and rely on low-density developments to accommodate population and job growth⁵.
 - Despite the small acreage, 12% of the population and 47% of jobs are expected to be in these frequent transit supportive areas by 2040.

⁵ Transit supportive areas are shown on the Composite Demand maps in Figures 7 and 8 as “Very Low” to “Medium”, while Frequent Transit supportive areas are shown as “High” and “Very High”.

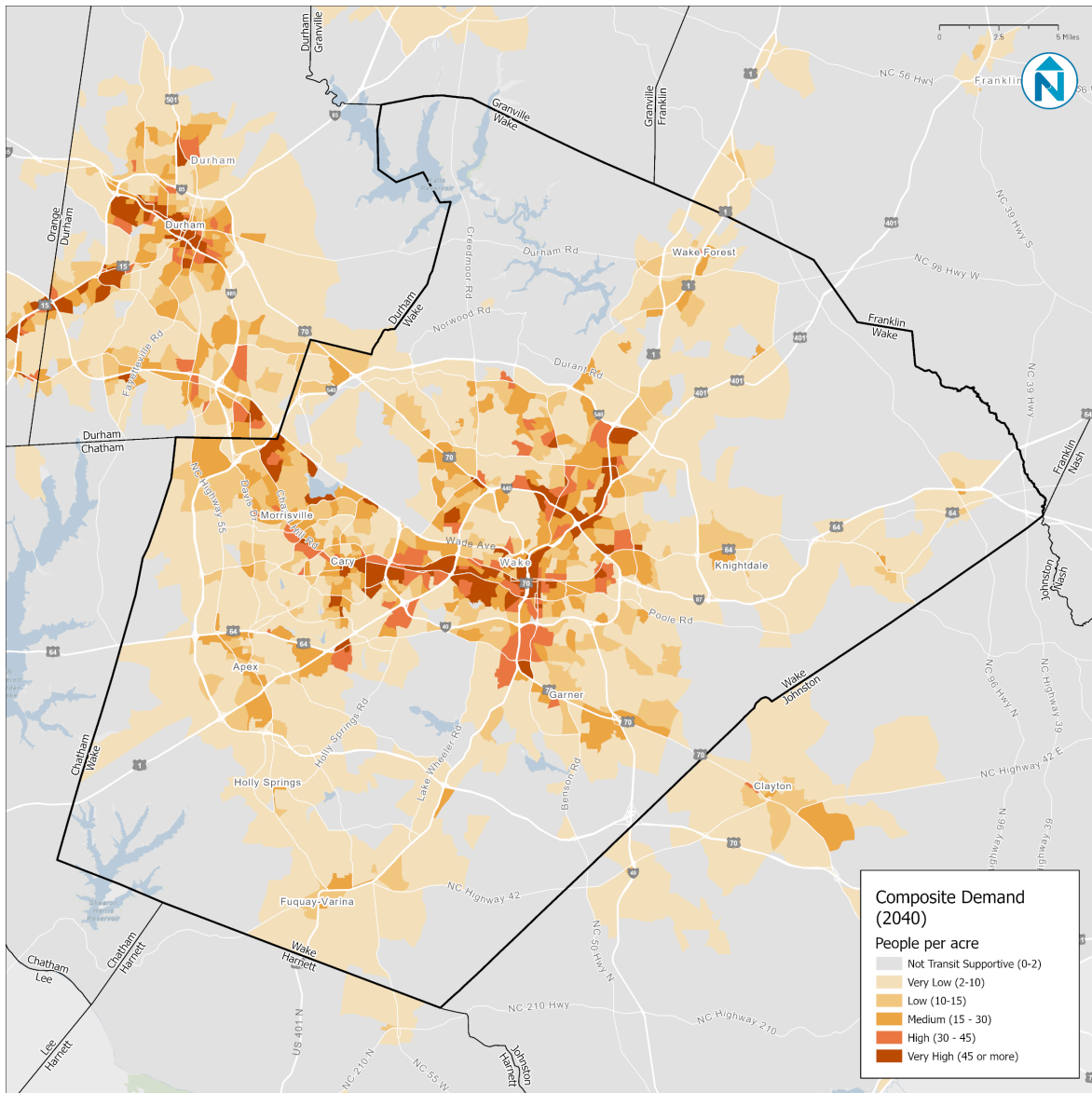
2035 Wake Transit Plan
NC Capital Area Metropolitan Planning Organization

Figure 7 Composite Transit Demand in 2020



2035 Wake Transit Plan
NC Capital Area Metropolitan Planning Organization

Figure 8 Composite Transit Demand in 2040



2035 Wake Transit Plan
NC Capital Area Metropolitan Planning Organization

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

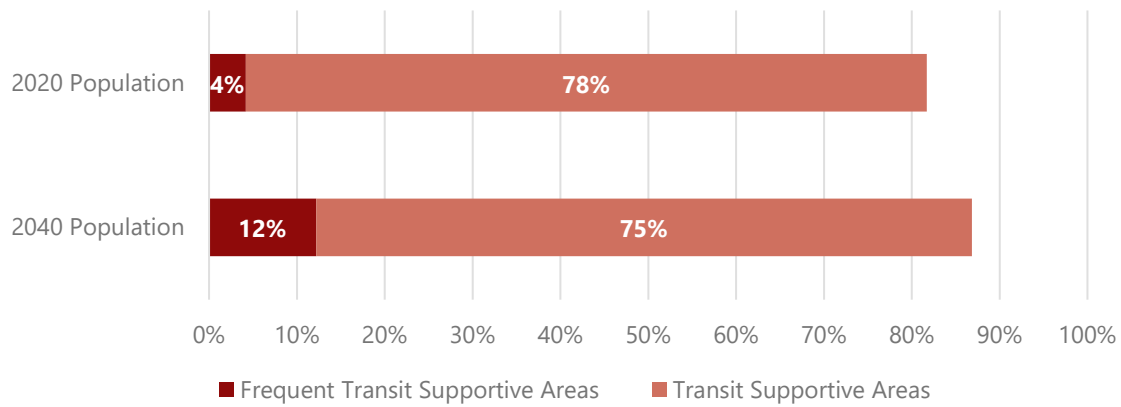


Figure 10 Jobs in Transit Supportive Areas – Change from 2020 to 2040

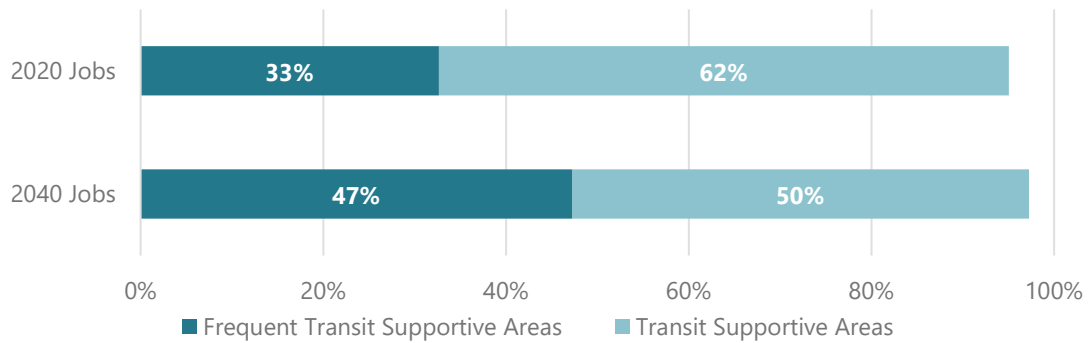
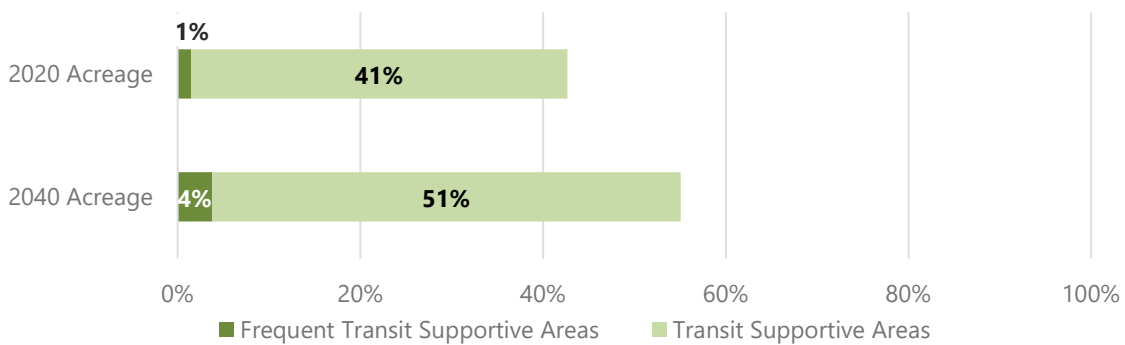


Figure 11 Transit Supportive Land Acreage in Wake County – Change from 2020 to 2040

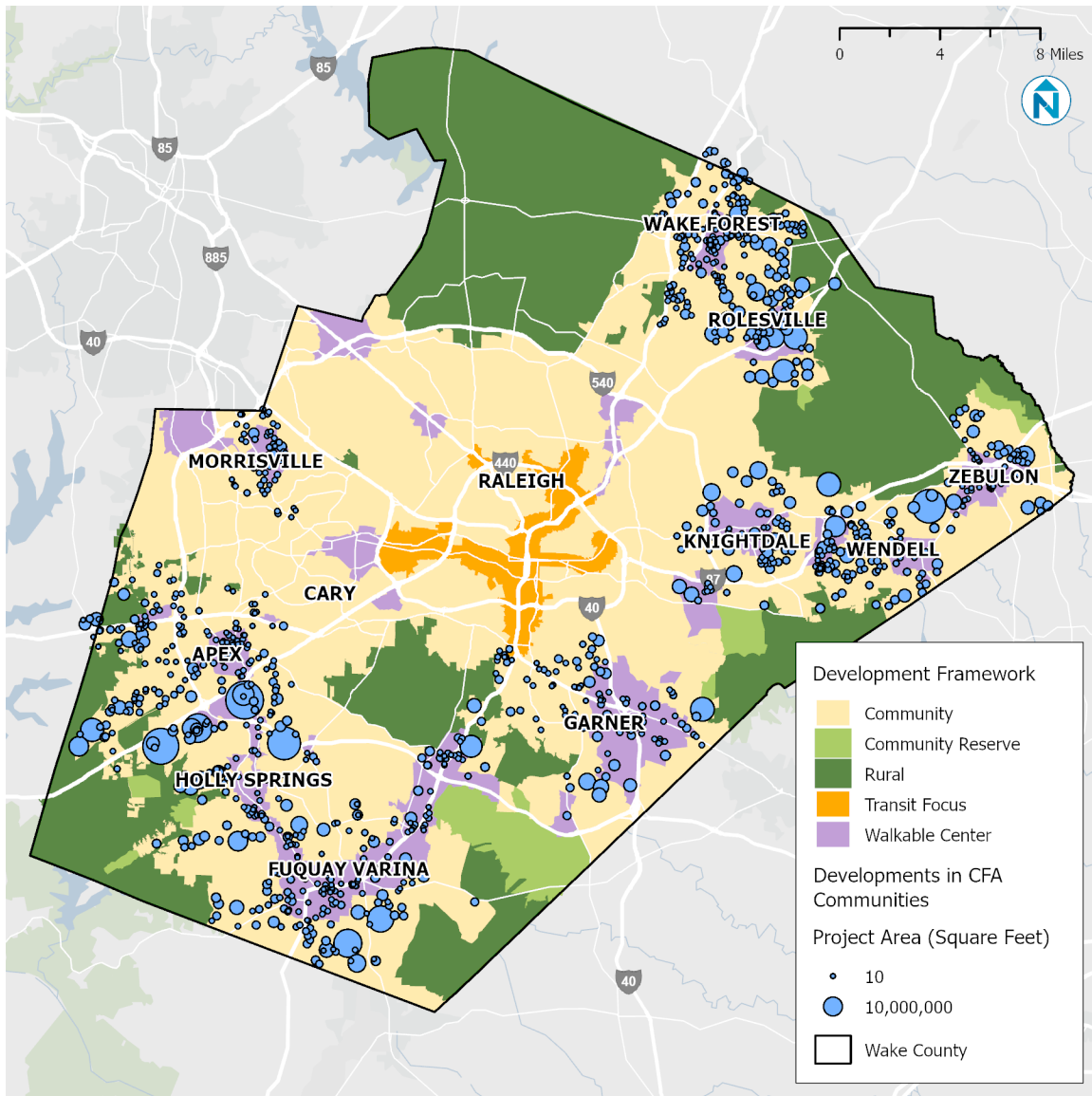


Suburban Growth and Development

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 cities and towns 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 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 and around Wake County towns.

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 call 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 make 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 small transit hub in Apex that is connected to neighboring towns with fast, frequent services to regional destinations is a potential future model.
 - **Northeast 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 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 investments that enhance access to the regional transit network, including more fixed-route bus service.

- **Development patterns suggest on-demand microtransit-style service or demand-response 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 included 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 at least one 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. Participants were shown order of magnitude cost information as well as 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 (for example). 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 from 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.

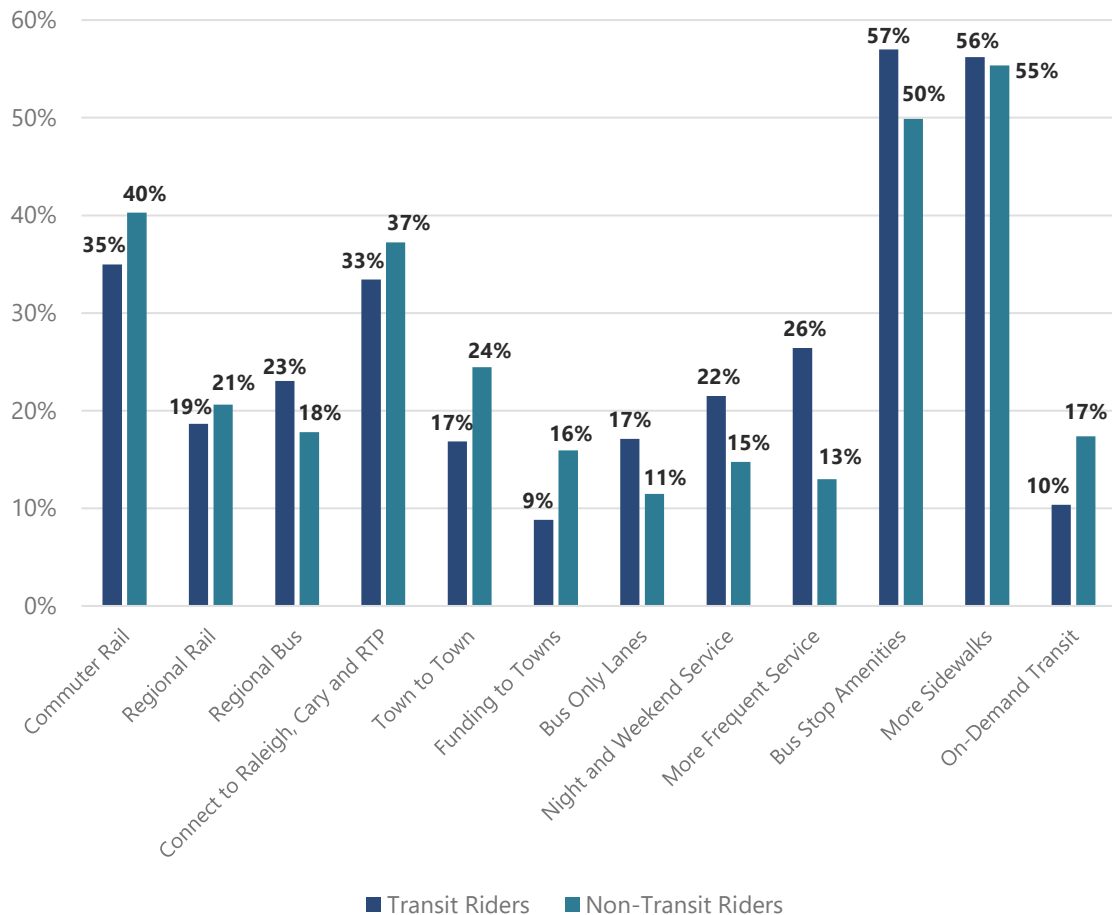
Findings from the survey showed that regional connections are important to people. Nearly everyone prioritized at least one regional connection, including commuter rail; connections

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-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 were 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 regional 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
- **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.
- Areas outside of Raleigh and Cary generally prefer prioritizing the launch of new bus services and creating multimodal community 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 expressed 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 passenger access points, 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 and 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 improving transit infrastructure, 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." The previous versions of the Plan set a general target of equal investment in service and infrastructure, since spending on capital projects as compared with operating projects is measurable.

While the two tradeoffs mentioned above were the primary tradeoffs discussed and used in the previous versions of the Plan, the 2030 Plan also examined additional tradeoffs:

- **Regional vs Local Service:** Investing in transit services connecting different towns and cities throughout the county and to locations in surrounding counties or investing in local services operating within cities and towns.
- **Speed/Directness of Travel vs Greater Access/More Stops:** Investing in infrastructure and service designed to provide faster and more direct trips or investing in

infrastructure and services designed to provide greater access with more bus stops, transfer points and/or transit stations.

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.

Previous versions of the Plan set measures and targets/goals for some of these investment tradeoffs, but the 2035 Wake Transit Plan does 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 previous versions of the 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 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 in RTP, Morrisville, Cary, Raleigh, and Garner. A two-year feasibility study⁶ 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 and state funding, the likelihood of federal financial support, forecasts that suggested low ridership, and uncertainty about 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 fund 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.

⁶ <https://www.readyforrailinc.com/feasibility/>

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, generally along the Western Boulevard corridor, to downtown Cary.
- **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. While the 2030 Wake Transit Plan noted these two study areas as corridors for the Frequent Network, the 2035 Wake Transit Plan recognizes these two BRT Study areas and has included them in the Plan as two branches 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 a Small Starts Grant valued at over \$35 million for the New Bern Corridor and a Small Starts Grant valued at \$86 million for the Southern Corridor.

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 riders⁷ 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; the 2021 Plan updated the estimated cost to \$511 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 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 or Cary Harrison Avenue/Kildaire Farm Road Corridor BRT** – the 2035 Plan calls for a major investment study to begin as early as FY 2027 to start exploring the feasibility, future design and potential implementation schedule of two new BRT corridors (the 2035 Plan includes funding for constructing one new BRT corridor):
 - I-40 BRT 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.
 - Harrison Avenue/Kildaire Farm Road BRT connecting I-40 near the SAS campus to Downtown Cary to Regency Park near US 64 in Cary, creating fast, frequent reliable connections between I-40 at Harrison Boulevard and Regency Park at US 64 in Cary. This BRT may also create an opportunity to connect to other services serving the airport and the Triangle Mobility Hub in RTP.

⁷ GoRaleigh Route Statistics Fiscal Year 2025

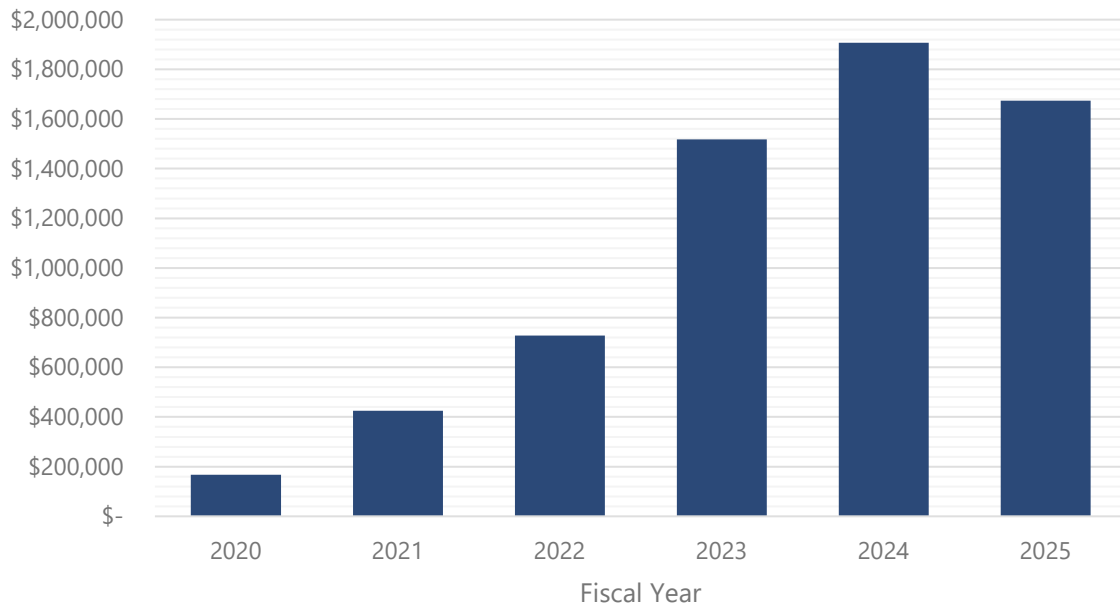
- **Future BRT Corridors** – the 2035 Wake Transit Plan includes funding for the study of up to five additional BRT corridors over the 10-year period. While not confirmed, these new BRT corridors may include Glenwood Avenue, an extension of New Bern to Knightdale, and a route from Cary to Apex and/or Blue Ridge. These corridors would be studied to determine feasibility and implementation schedule for construction and operation beyond 2035.

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 or Allocated 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 CFA PMP 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 in the updated CFA PMP 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, uncertainty about funding from other sources, 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’s, Knightdale’s, Wendell’s, 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:

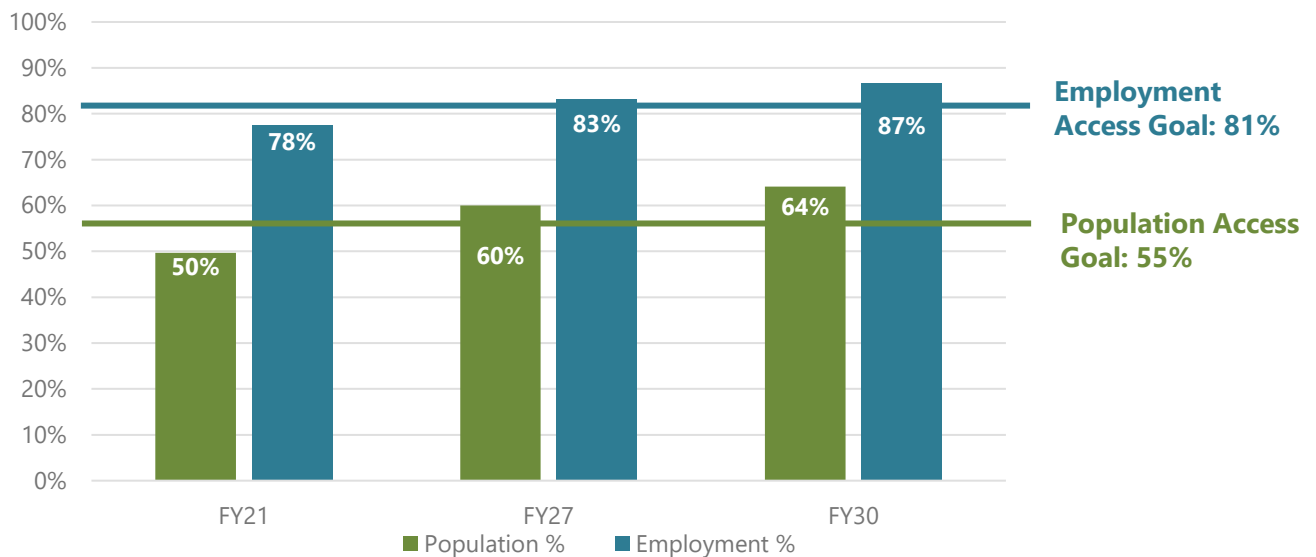
- Vehicles, booking systems and facilities must be accessible to all riders and meet ADA standards.
- Service must operate on weekdays for at least 12 hours per day.
- The standard for passenger wait times is 30 minutes.
- Services should operate with either a curb-to-curb model, door-to-door model, node-based model or a corner-to-corner 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.

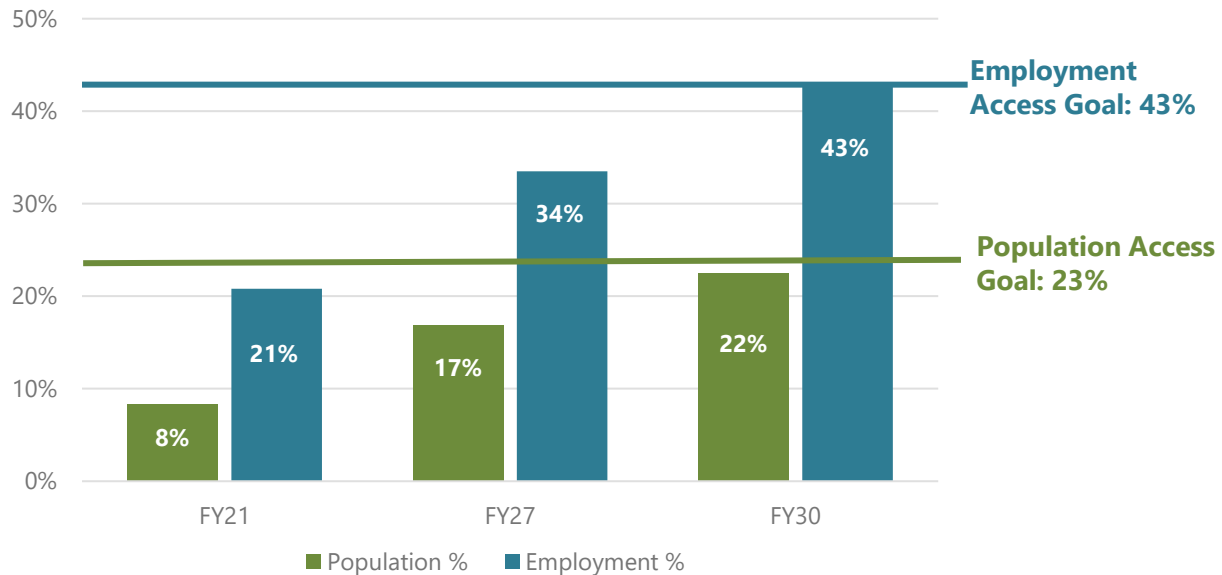
Historically, progress toward the goals has been measured by calculating access to transit in terms of both the frequent bus network and all-day transit services (previously defined as 17 hours per weekday). The targets set in the 2027 Plan and confirmed in the 2030 Plan were that 55% of Wake County 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 15). 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 16).

Figure 15 Residents and Jobs Within $\frac{3}{4}$ 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 ¾ 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 transit passenger access points (bus stops, stations, transit centers, transfer points, etc.) instead of creating a buffer around the entire transit corridor.
- The ¾ mile buffer area is replaced with a shorter ½ mile distance that follows the sidewalk/pedestrian network.
- There will now be four measures tracked for this goal:
 - 35% of Wake County's population will be within ½ mile of the frequent service network.
 - 50% of Wake County's jobs will be within ½ mile of the frequent service network.
 - 75% of Wake County's population will be within ½ mile of the all-day transit network.
 - 90% of Wake County's jobs will be within ½ 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 and pedestrian 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 and 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. The updated Access to Transit metric and goals are described in Chapter 6 (see also Figure 21 and Figure 22).

Figure 17 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 transit passenger access points in the transit network
Buffer Method	“As the crow flies” distance from the corridor	Following streets with sidewalks

Project Prioritization Guidance

The 2030 Wake Transit Plan Vision Update (2021) recommended prioritization and reprogramming guidance based on tiers, that included eight project / program tiers for how funding will be distributed based on limited financial capacity within the 2030 financial constraint. This guidance was largely developed to deal with financial constraints brought on by the COVID pandemic and was used to prioritize projects and programs for funding when funding was significantly constrained. Updates to the Project Prioritization Guidance are being developed by the Program Development subcommittee of the Transit Planning Advisory Committee and the updated Guidance is expected to be completed by the end of 2025. Once approved by the TPAC, the updated Guidance will be added as Appendix E to this Plan document.

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 Tax levied in Wake County only
- A \$3 increase to the regional Vehicle Registration Tax
- A portion of the regional 5% Vehicle Rental Tax allocated to Wake County by the GoTriangle Board of Trustees⁸

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 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 tax is an increase to an existing regional vehicle registration tax (\$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 tax is a Wake Transit specific tax levied on people registering vehicles in Wake County.

REVENUE

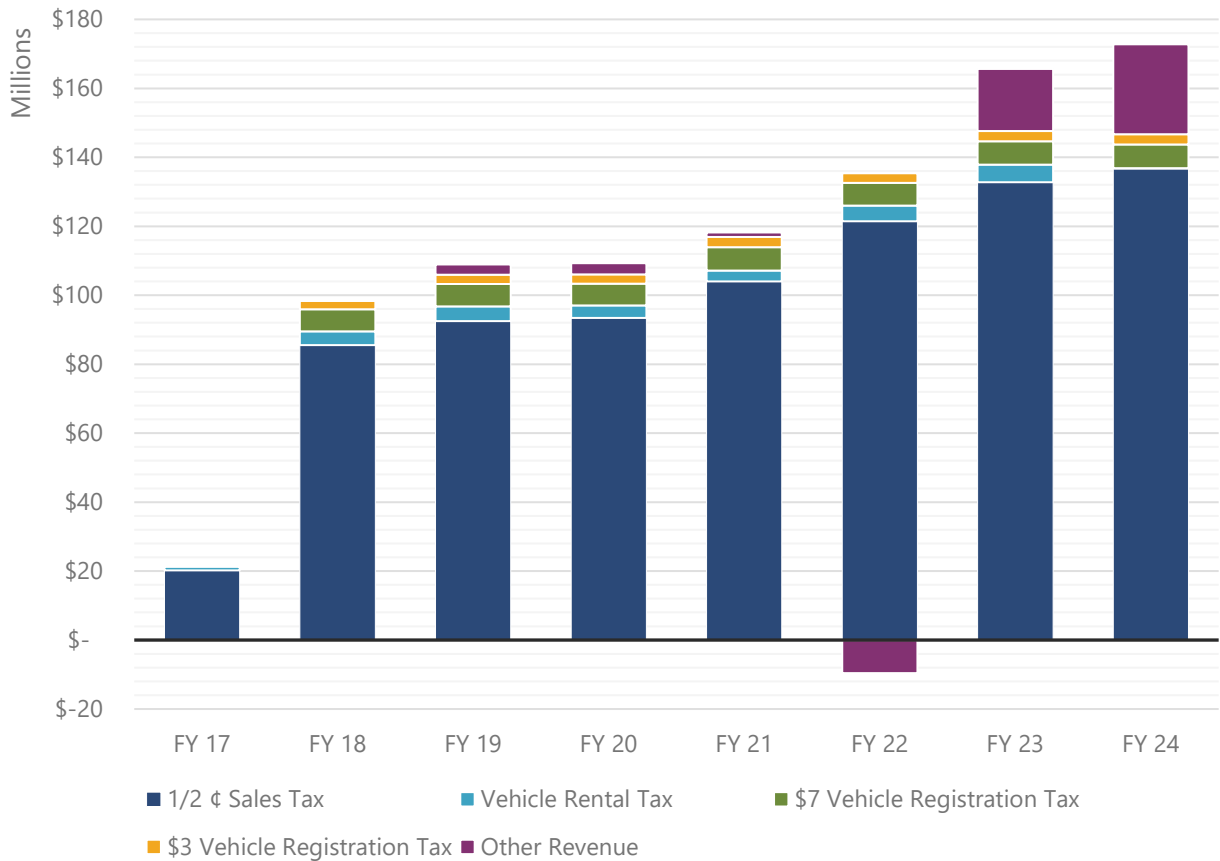
Between 2017 and 2024, the Wake Transit Plan raised \$878.2 million in revenues. The majority (90%) of the revenue is associated with the ½ cent sales tax (see Figure 18). The revenue stream has consistently outperformed expectations, in part reflecting strong growth in Wake County. Revenues are expected to continue to grow through 2035. The total revenue

⁸ The portion of the Regional Vehicle Rental Car Tax Revenue attributable to Wake Transit continues to be under discussion by the Wake Transit Conference Committee formed in the Spring of 2024. If there is a decision by the Conference Committee to remove or amend the revenue assumptions for the portion of the vehicle rental tax attributable to Wake County, an amendment to this Plan will be required.

2035 Wake Transit Plan
NC Capital Area Metropolitan Planning Organization

projected from the four primary sources (sales tax, Wake County car registration tax, regional car registration tax increases and rental car tax) between FY2026 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

Notes:

In FY22, there was an unrealized negative return associated with investments included in Other Revenue. In FY24, GoTriangle and CAMPO agreed to allocate approximately 1 month of Vehicle Rental Tax (VRT) revenue to the Wake Transit Plan for FY24 only (the remainder was used by GoTriangle). CAMPO, GoTriangle and Wake County continue to discuss the inclusion of VRT Revenue in the Wake Transit Plan

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 Capital BRT Grants** – 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 corridor between Garner and Clayton and Western corridor 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 \$150 million 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, it is held in reserve for protection against worst case scenarios.

- **Debt Coverage Ratio** – the debt coverage ratio is a metric that ties cash flow and debt repayment and ensures that enough revenues will be available for debt service. The Wake Transit Plan contains a 1.25 net debt service coverage ratio. This is consistent with financial industry practices and means that net revenues (revenues available after paying operating expenses) must be 125% or greater than the debt service in a given year, or, for example, if the Wake Transit Plan has \$10 million in debt service due in a given year, then the net revenues after paying operating expenditure must be at least \$12.5 million.

2035 WTP Expenditures

These two pieces combine to create a 10-year investment strategy that outlines how \$3.0 billion in transit funding will be spent between FY 2026 and FY 2035 (see Figure 19).

Highlights of the investment strategy include:

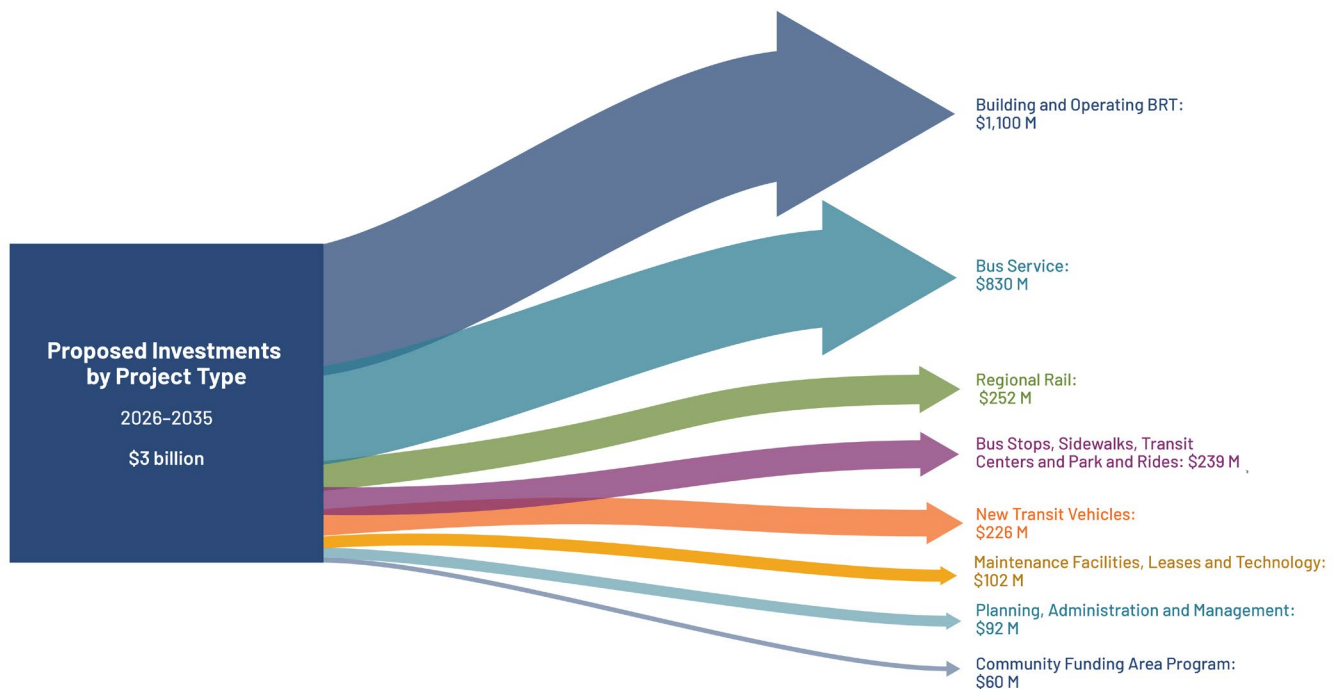
- \$1.8 billion will be spent on projects and services that were already committed as part of previous work plans and Wake Transit Plans.
 - Just over half of the money (\$941 million) is for operating projects, like fixed-route bus services, other bus routes, the Community Funding Area Program operating projects 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. Stakeholders and members of the public consistently expressed support for operating projects, but WTP funding is constrained by Wake Transit Plan implementation financial policies. In particular, the plan requires that debts are covered by revenues so that WTP sales tax revenues after operating expenses are deducted must remain at 1.25 times the annual debt service. Based on the assumptions for debt and debt service, the 2035 WTP dedicates as much funding towards operating projects as possible while staying within these constraints.
 - Capital projects account for most of the “new” funds, or about \$954 million, and will be directed to regional rail investments, studying and developing new BRT

corridors, buying vehicles, and improving transit centers, bus stops and other passenger facilities.

- Funding for new planning, capital and operating projects in the Community Funding Area Program are also included.
- \$429 million is allocated to repay outstanding bonds and other debt service obligations. A portion of these funds will also be set aside as reserves to safeguard against worst-case financial scenarios and to cover costs associated with issuing the debt.

This 10-year investment strategy is different from previous Wake Transit Plans because, while it focuses on finishing projects already started, it also adds a handful of major investment projects. 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 to operating projects, to 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 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 Street) and west (Western Boulevard); two extension corridors (Cary to RTP and Garner to Clayton); and the study and potential implementation of either the I-40 BRT connecting Raleigh, RDU and RTP or the Cary BRT service connecting I-40 to US 64 via Harrison Boulevard and Kildaire Farm Road. These corridors will create approximately 90 miles of BRT service.
- Invest in bus stops to meet the Americans with Disabilities Act (ADA) standards and ensure 70% of bus riders board at stops with a bench or shelter. Total investments in bus stops, sidewalks and crosswalks are estimated at \$40 million 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 \$60 million 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 a handful of 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 transit passenger access points (bus stops, stations, transit centers, transfer points, etc.). 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 overtime 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 to measure from transit investments. While the 2035 Wake Transit Plan does not forecast ridership, historic data on ridership levels is available, which provides some insights into expected growth.
- **Microtransit service** is a growing service model that has performed well in different operating environments in Wake County, including rural and suburban areas. The 2035 WTP does not recommend specific microtransit services; however, additional microtransit will increase access to transit.

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 3/4 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 measures progress accordingly.

Figure 20 Proposed Change from Proximity to Access to Transit

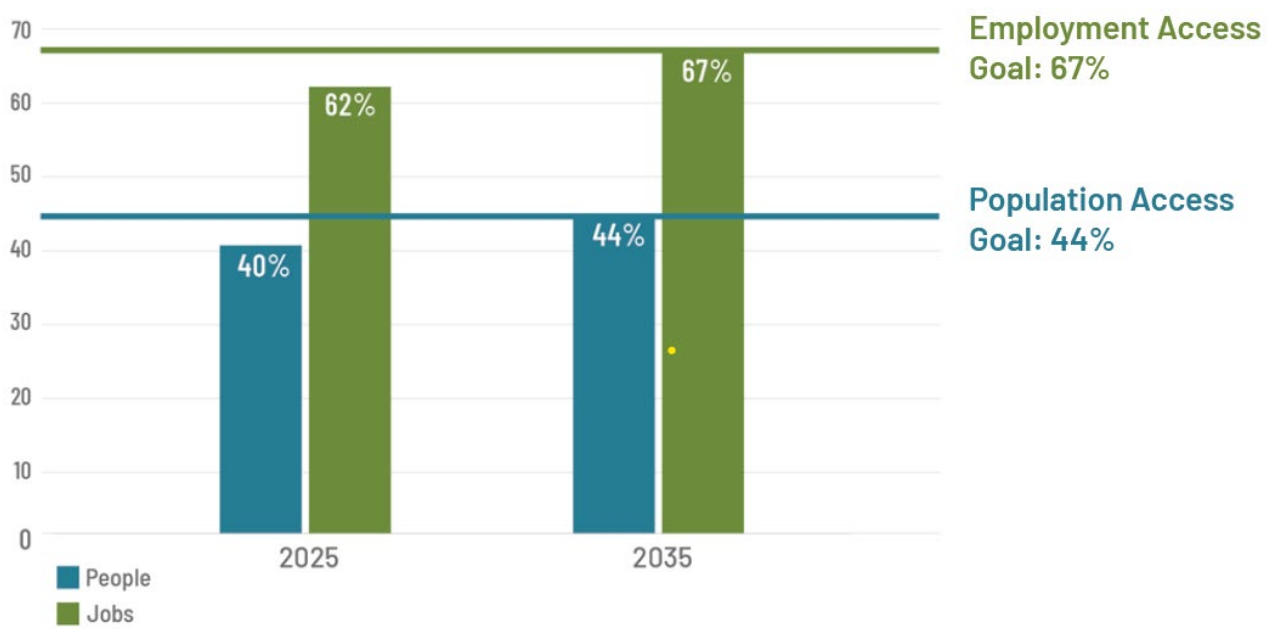
	Current “Proximity to Transit” Measure	Proposed “Access to Transit” Measure
Distance	¾ mile (15–20 minutes walking)	½ mile (10–15 minutes walking)
Distance From...	Transit route or corridor line	Transit passenger access points (bus stops, stations, transit centers, transfer points, etc.)
Buffer Method	“As the crow flies” distance from the corridor	Following streets with sidewalks

As part of incorporating a new measure for access to transit, the 2035 WTP is also recommending new goals or benchmarks for access to all day and frequent transit service. The new goal for access to transit service is based on people and jobs within ½ mile of a transit stop, using streets with sidewalks and the pedestrian infrastructure network.

- The **baseline access to transit** counts the number of people and jobs within ½ mile of a bus stop (accessible by sidewalk) in the existing transit network or in a microtransit zone. The count of people and jobs is divided by Wake County’s total population and employment (2025) (see Figure 21).
- The **target for access to transit in 2035** counts the number of people or jobs within ½ mile of a bus stop (accessible by sidewalk) according to the proposed WTP 2035 transit network (including routes identified as “Potential New” services), including microtransit services. People and jobs within this catchment area are compared against total population and employment in Wake County (2025). This is set as the target or goal because it reflects full implementation of the 2035 Plan, so is the maximum access possible (see Figure 21).
- Access to Frequent Transit follows a similar process. The **baseline access to frequent transit** includes the number of people and jobs within ½ mile of a bus stop (accessible by sidewalk) in the frequent transit network and divides this number by Wake County’s total population and employment (2025) (see Figure 22).

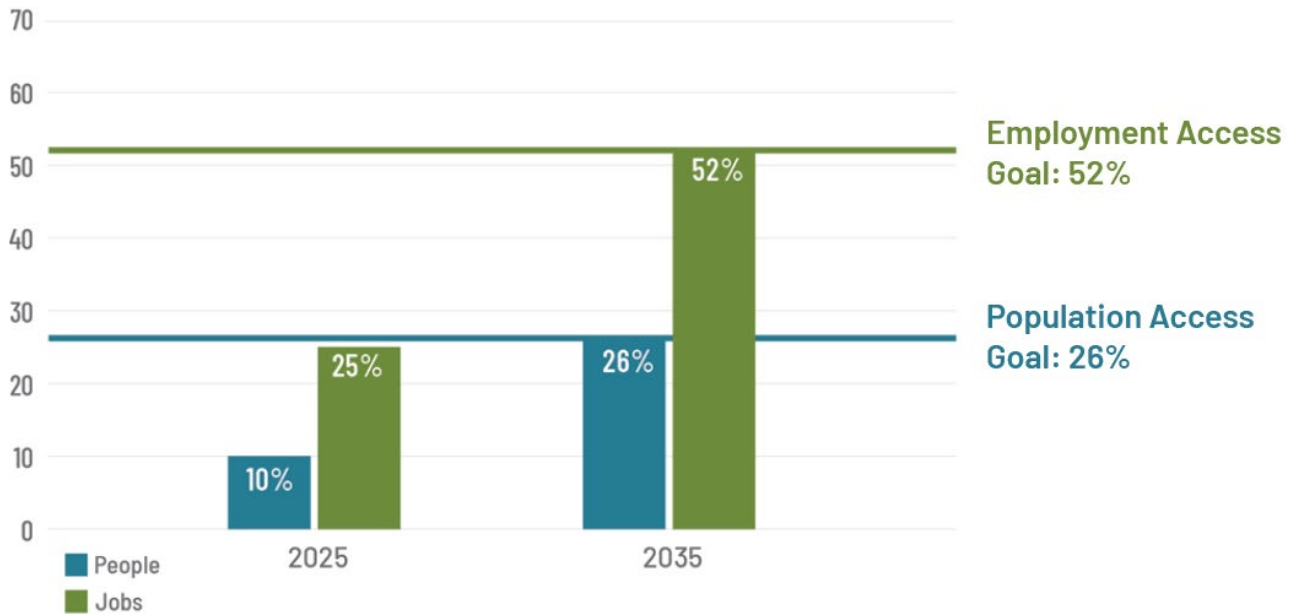
- The **target for access to frequent transit in 2035** counts the number of people or jobs within ½ mile of a bus stop (accessible by sidewalk) with frequent service using the proposed WTP 2035 transit network (including all frequent routes identified as “Potential New Frequent Route”). People and jobs within this catchment area are compared against total population and employment in Wake County (2025). As stated, this goal reflects full implementation of the 2035 Plan and is the maximum access possible (see Figure 22).

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)

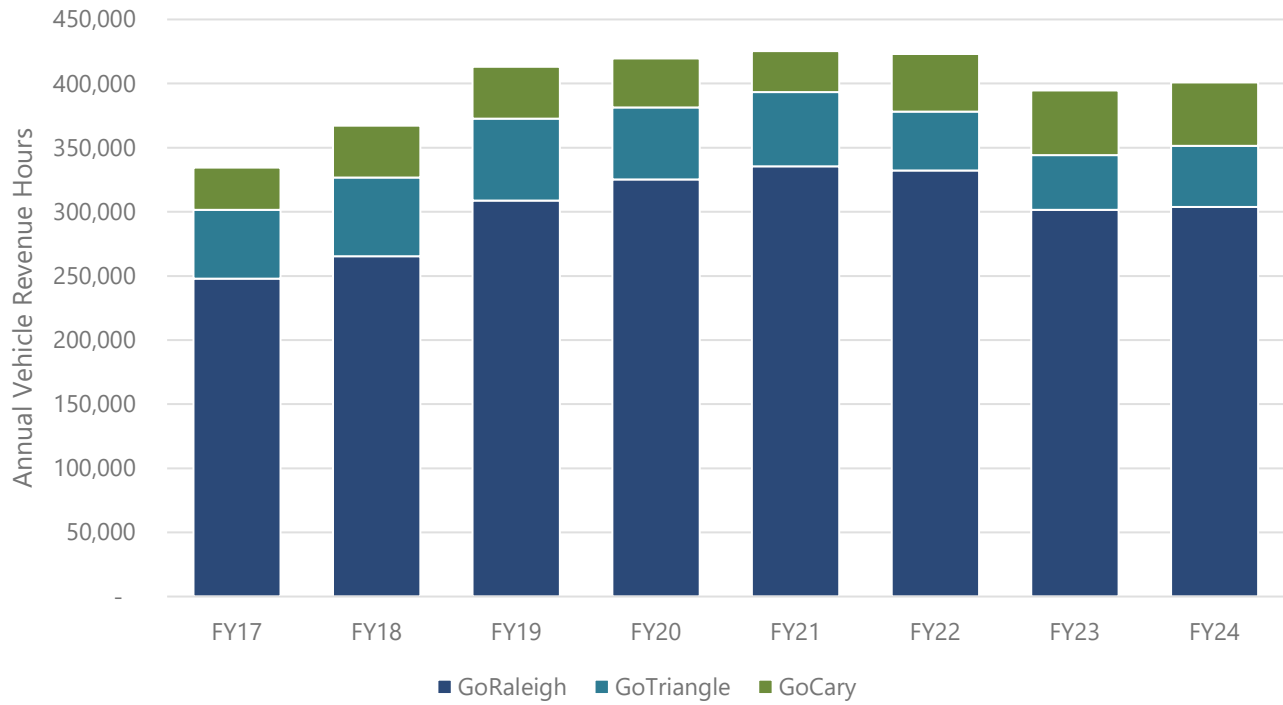


Source: Wake Bus Plan and Wake Transit Plan adapted by Nelson\Nygaard Consulting Associates

Hours of Bus Service

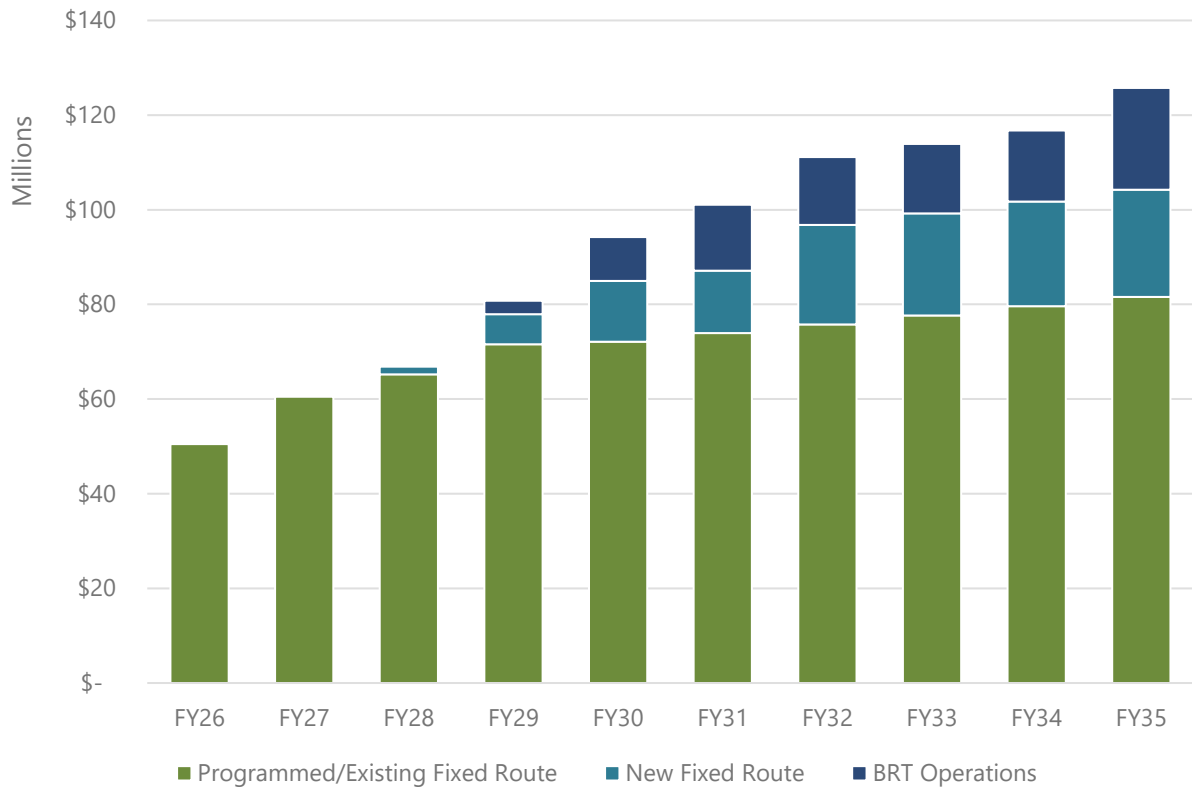
Hours of bus service, measured as vehicle revenue hours (meaning the vehicle is in service and available to pick up and drop off riders) demonstrate the overall level of transit service. In FY17, GoTriangle, GoRaleigh and GoCary collectively operated 334,372 hours of service over the calendar year; in 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 over 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

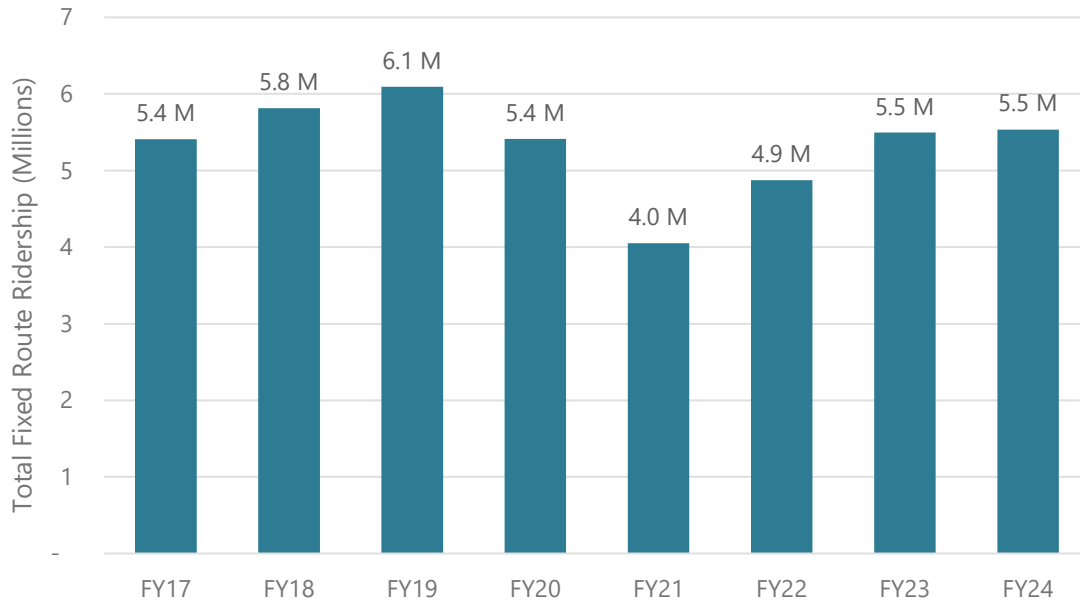
An important outcome from investments in transit service is ridership. Indeed, the return on an investment in more hours of available service, or days of the week, is more ridership. Transit ridership was on a strong upwards trajectory prior to the COVID-19 pandemic, with early investments from the Wake 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-facing technology systems (fares, signage, information, and apps), shared facilities, including both passenger-facing and back of house facilities, and more integrated services.