

2025 Wake Transit Annual Bus Service Performance Review Memo

Executive Summary

The 2025 Wake Transit Annual Bus Service Performance Review evaluates how bus services funded through Wake Transit performed across the larger, fixed-route bus service agencies: GoCary, GoRaleigh, and GoTriangle. The review applies the Service Standards and Performance Guidelines, adopted January 2024 in conjunction with the Wake Bus Plan, which establishes standards for service quality, effectiveness, and cost efficiency across Wake Transit bus operations projects. The observation window for this review is FY24Q2-FY25Q3, but insights into greater trends for the purpose of this memo were also looked at through previous years' bus service performance review data.

Overall, inference from the data shows that the transit network continues to recover from pandemic-related ridership losses and operation disruptions. Ridership improved on most local routes, particularly with GoCary and GoRaleigh, while regional and express services remain below performance targets. Cost per boarding increased on regional and commuter services, a reflection of lower passenger volumes and trends in operator shortages. As a general observable trend, on-time performance has improved modestly, but largely continues to fall short of the 85% target.

Background and Methodology

This annual review assess service performance for all fixed-route bus operations that receive Wake Transit funding. Data from quarterly reports (FY24Q2-FY25Q3) were analyzed using the performance measures and standards outlines in the Service Standards and Performance Guidelines document.

Category	Metric	Target	Purpose
Service Quality	On-Time Performance	85% of trip being on time	Measures reliability and schedule adherence
Service Effectiveness	Passenger Boardings per Revenue Hour/Trip	Frequent ≥ 20 ; Local ≥ 12 ; Community ≥ 8 ; Regional ≥ 9 ; Express ≥ 8	Indicates productivity of service investment
Cost Efficiency	Operating Cost per Boarding	Frequent $\leq \$6$; Local $\leq \$12$; Community $\leq \$12$; Regional $\leq \$11$; Express $\leq \$11$	Evaluates fiscal performance relative to ridership

Table 1, Performance Metrics and Targets

The Service Standards and Performance Guidelines outline a phased approach for the purpose of recovery from the COVID-19 pandemic. Services are expected to meet 90% of productivity targets and 110% of cost per boarding during FY22-FY26. Routes within 18 months of new implementation or major modification are considered to be in a development period and are excluded from classification in this

review as being labeled under- or overperforming to allow for better route adoption for riders and for more mature data to be available before detailed analysis on the route performance occurs.

Challenges and Data Limitations

There are notable challenges in performing the review. Firstly, the Service Standards and Performance Guidelines outline dynamic reporting for passengers per boarding hour that is to be reported by time-of-day. This metric, however, cannot be reported by all agencies due to differences in data collection methods and capabilities. Therefore, this metric was standardized in this review as average boardings per revenue hour.

The performance guidelines outline a bonus for routes serving three or more communities of concern. There is also a development window where routes that have seen more significant service changes are given a development period of 18 months. Neither of these are considered in existing reporting processes. Coordination will need to occur to ensure a unified process for the next review.

It is notable that the Service Standards and Performance Guidelines document will be reviewed and updated as part of the Wake Bus Plan 2035 development process. Part of this will be ensuring that is asked of bus operating agencies can be reported. There will also need to be coordination and involvement of all observable transit agencies to ensure that necessary information to conduct the review is able to be reported.

Program-wide Analysis

The analysis below summarizes systemwide performance for all Wake Transit funded fixed-route services within the observation window (FY24Q2-FY25Q3).

Provider	Number of Routes Review	Overperforming	Missed ≥ 1 Target	Underperforming	Within Development Period
GoCary	8	0	6	0	2
GoRaleigh	21	2	5	3	0
GoTriangle	6	0	1	0	5

Table 2, Route Observation Overview

Ridership recovery is evident on most local routes, with GoRaleigh and GoCary seeing notable gains. Cost efficiency remains a challenge on regional and express routes. On-time performance continues to hover around 80-83% on average.

Provider Summaries

GoCary

GoCary's fixed-route network continues to perform steadily, with modest ridership recovery and service stabilization following pandemic-related disruptions. No routes were classified as over- or

underperforming. Observed trends show performance closely tied to those with regional connections. Some GoCary routes experienced a negative trend in connecting ridership from GoTriangle’s returning to fares.

Route 7 Weston Parkway was originally implemented with commuter-oriented travel in mind, anticipating development in the Weston office area. Delays in planned commercial development have limited ridership potential, though schedule changes have helped stabilize performance during peak hours.

Future infrastructure investments in transit signal priority installation at intersections in Cary, scheduled for FY26, are expected to improve on-time performance. GoCary’s overall network performance reflects steady productivity within its service classification.

Routes Observed	Notes
1, 3, 4, 5, 6, 7, ACX	No under- or overperforming routes; stable system performance with localized ridership fluctuations.

Table 3, GoCary Route Observations

GoRaleigh

GoRaleigh’s system demonstrates measurable recovery and stable system performance. Starting in FY26Q1, GoRaleigh utilizes automatic passenger county (APC) data instead of farebox data. This has enabled them to more accurately capture ridership, and they have observed an increase in ridership through more accurate data collection which will be captured in a future bus service performance review. Several routes have been restructured or have planned service changes to improve level of service and align with travel demand.

Underperforming routes include Route 26 Edwards Mill, 27L Blue Ridge, and Route 36 Creedmoor, and service changes have occurred to these or are being evaluated to better serve the riders and align with travel demand. Route 26 was discontinued in June 2025. Route 27L is being evaluated for conversion to microtransit service. Route 36 was modified to 36L, removing its GoRaleigh Station connection.

Routes missing one or more targets (12, 17, 18, 18L, and 33) were addressed through service changes implemented in June and October 2025.

Route 7L Carolina Pines, an overperforming route, received a frequency increase to 30-minute daytime service in June 2025 to better align with travel demand.

Performance Category	Routes	Notes
Overperforming	3, 7L	High ridership and low cost per boarding; frequency increase implemented for 7L.
Missed ≥ 1 Targets	12, 17, 18, 18L, 33	Affected by service changes in 2025.
Underperforming	26, 27L, 36	26 discontinued; 27L being evaluated for transition to microtransit; modification to route 36 -> 36L.

Table 4, GoRaleigh Route Observations

GoTriangle

GoTriangle's regional routes continue to face challenges due to shifting commuter patterns. Of the six routes evaluated, Route 100 (Raleigh-Airport-RTC) is the only one outside of the development period and remains near the productivity target with an average of 11.8 passengers per revenue hour versus a target of 9. Cost per boarding exceeds the \$11 target, primarily due to operational expenses and reduced ridership during periods of inclement weather in FY25Q3. GoTriangle reported that route performance rebounded in FY25Q4.

Routes	Notes
100	Missed one or more targets, within normal variation for regional service.
300, 305, 310, CRX, DRX	Within the 18-month development period, performance review deferred.

Table 5, GoTriangle Route Observations

Conclusion

The 2025 Wake Transit Bus Service Performance Review demonstrates that Wake Transit investments continue to yield steady progress towards a more connected, reliable, and efficient transit network. While challenges remain, local route performance and ridership indicate clear momentum. Continued collaboration among CAMPO, GoCary, GoRaleigh, GoTriangle, and the Tax District Administration will be critical as we move towards further bus service performance analysis, evaluation, and planning into the Wake Bus Plan 2035. With improved data collection and reporting, coordinated service design, and targeted investments, the bus network across Wake County is well positioned to meet evolving community needs and continue building towards a more connected future.

Appendix A: Wake Transit Route Performance Summary

FY2025 Q3

Route

Ridership

Trend

Boardings per Hour

Target Actual

Cost per Boarding

Target Actual

Farebox Recovery

Target Actual

On-Time Performance

Target Actual

GoTriangle

100: Raleigh-Airport-RTC		9.0	11.8	●	\$11.00	\$13.98	▲ 1	0%	0%	×	85%	75%	◆ 7
300: Raleigh-Cary		8.5	10.5	*	\$11.50	\$15.76	*	0%	0%	×	85%	81%	*
305: Raleigh-Apex-Holly Sp		9.0	4.3	*	\$11.00	\$38.24	*	0%	0%	×	85%	84%	*
310: Cary-Wake Tech-RTC		9.0	8.6	*	\$11.00	\$19.16	*	0%	0%	×	85%	83%	*
CRX: Chapel Hill-Raleigh		9.0	5.9	*	\$11.00	\$27.93	*	0%	0%	×	85%	74%	*
DRX: Durham-Raleigh		9.0	6.7	*	\$11.00	\$24.55	*	0%	0%	×	85%	87%	*

GoRaleigh

3: Glascock		6.4	11.8	●	\$12.00	\$8.76	●	0%	0%	×	85%	86%	●
4: Rex Hospital		13.5	12.1	×	\$11.00	\$8.55	×	0%	0%	×	85%	76%	×
6: Crabtree		22.5	15.6	*	\$5.50	\$6.64	*	0%	0%	×	85%	87%	*
7: South Saunders		20.0	15.2	*	\$6.00	\$3.69	*	0%	0%	×	85%	84%	*
9: Hillsborough		20.0	9.3	*	\$6.00	\$11.07	*	0%	0%	×	85%	79%	*
7L: Carolina Pines		6.4	15.1	●	\$12.00	\$6.87	●	0%	0%	×	85%	86%	●
11: Avent Ferry		20.0	16.1	*	\$6.00	\$6.44	*	0%	0%	×	85%	76%	*
12: Method		6.4	16.0	●	\$12.00	\$6.47	●	0%	0%	×	85%	85%	▲ 1
17: Rock Quarry		12.0	17.2	●	\$12.00	\$6.01	●	0%	0%	×	85%	55%	◆ 6
18: Poole-Barwell		6.4	11.0	●	\$12.00	\$9.45	●	0%	0%	×	85%	60%	◆ 12
18S: Poole		6.4	11.0	●	\$12.00	\$9.44	●	0%	0%	×	85%	63%	◆ 4
19: MLK-Sunnybrook		20.0	16.8	*	\$6.00	\$6.16	*	0%	0%	×	85%	79%	*
20: Garner		12.0	16.3	*	\$12.00	\$6.33	*	0%	0%	×	85%	80%	*
21: Caraleigh		20.0	41.1	*	\$6.00	\$2.52	*	0%	0%	×	85%	79%	*
26: Edwards Mill		13.5	3.4	◆ 25	\$11.00	\$30.78	◆ 25	0%	0%	×	85%	73%	◆ 4
27: Blue Ridge		13.5	3.5	◆ 25	\$11.00	\$29.38	◆ 25	0%	0%	×	85%	80%	◆ 4
33: Knightdale		6.8	5.7	▲ 1	\$11.50	\$18.20	◆ 22	0%	0%	×	85%	74%	◆ 9
36: Creedmoor		13.5	5.0	◆ 25	\$11.00	\$20.80	◆ 25	0%	0%	×	85%	79%	◆ 4
70L: Brier Creek		8.0	15.1	*	\$12.00	\$6.84	*	0%	1%	*	85%	64%	*
FRX: Fuquay-Varina		9.0	3.6	×	\$11.00	\$29.12	×	0%	0%	×	85%	64%	×
401: Rolesville		10.0	0.0	×	\$10.00	\$0	×	0%	0%	×	85%	0%	×

GoCary

1: Crossroads (new)		6.8	7.1	●	\$11.50	\$14.03	◆ 3	0%	0%	×	85%	88%	●
3: Harrison Ave		7.2	9.3	●	\$11.00	\$10.71	●	0%	0%	×	85%	78%	◆ 4
4: High House Rd		7.2	5.8	◆ 3	\$11.00	\$17.12	◆ 15	0%	0%	×	85%	86%	●
5: Kildaire Farm Rd		6.8	12.0	●	\$11.50	\$8.33	●	0%	0%	×	85%	83%	▲ 2
6: Buck Jones Rd		6.8	6.2	▲ 1	\$11.50	\$16.21	◆ 3	0%	0%	×	85%	90%	●
7: Weston Pkwy		7.2	5.5	◆ 17	\$11.00	\$18.13	◆ 17	0%	0%	×	85%	89%	●
ACX: Apex-Cary		8.0	0.7	◆ 17	\$10.00	\$146	◆ 17	0%	0%	×	85%	67%	▲ 2

The "Ridership Trend" column illustrates change in ridership over the past eight quarters.

Key:

●	Met target this quarter
▲ 1	Missed target this quarter
▲ 2	Missed target for two consecutive quarters
◆ 3	Missed target for three or more consecutive quarters
*	Route is still in 18-month development period after service change
×	Route is not subject to Wake Transit performance standards
◆ 3	Underperforming: Route has missed targets on three performance measures for three or more consecutive quarters

Appendix B: Wake Transit Route Performance Trends FY24Q2-FY25Q3

Route	Boardings per Hour/Trip							Cost per Boarding							Farebox Recovery							On-Time Performance										
	24 Q2	24 Q3	24 Q4	25 Q1	25 Q2	25 Q3	Target	24 Q2	24 Q3	24 Q4	25 Q1	25 Q2	25 Q3	Target	24 Q2	24 Q3	24 Q4	25 Q1	25 Q2	25 Q3	Target	24 Q2	24 Q3	24 Q4	25 Q1	25 Q2	25 Q3	Target				
GoTriangle																																
100: Raleigh-Airport-RTC	100	19.0	18.4	19.2	17.6	17.6	11.8	9.0	100	\$ 7.78	\$ 8.04	\$ 9.31	\$ 9.34	\$ 9.38	\$ 13.98	\$ 11.00	100								100	84%	75%	76%	71%	74%	75%	85%
300: Raleigh-Cary	300	23.1	20.8	22.1	16.5	15.2	10.5	8.5	300	\$ 6.42	\$ 7.12	\$ 8.09	\$ 9.98	\$ 10.81	\$ 15.76	\$ 11.50	300								300	83%	77%	73%	67%	72%	81%	85%
305: Raleigh-Apex-Holly Sp	305	8.0	7.8	9.5	4.3	4.7	4.3	9.0	305	\$ 18.47	\$ 19.09	\$ 18.73	\$ 38.17	\$ 34.95	\$ 38.24	\$ 11.00	305								305	80%	69%	63%	73%	80%	84%	85%
310: Cary-Wake Tech-RTC	310	12.6	12.5	14.2	12.6	13.2	8.6	9.0	310	\$ 11.71	\$ 11.84	\$ 12.63	\$ 13.04	\$ 12.46	\$ 19.16	\$ 11.00	310								310	82%	82%	87%	82%	77%	83%	85%
CRX: Chapel Hill-Raleigh	CRX	7.3	7.5	7.2	6.1	5.8	5.9	9.0	CRX	\$ 20.24	\$ 19.61	\$ 24.91	\$ 26.89	\$ 28.32	\$ 27.93	\$ 11.00	CRX								CRX	78%	78%	79%	75%	70%	74%	85%
DRX: Durham-Raleigh	DRX	10.1	9.3	10.4	9.9	11.4	6.7	9.0	DRX	\$ 14.64	\$ 15.90	\$ 17.23	\$ 16.58	\$ 14.52	\$ 24.55	\$ 11.00	DRX								DRX	87%	87%	86%	82%	82%	87%	85%
GoRaleigh																																
3: Glascock	3	11.1	9.6	6.9	9.7	11.8	11.8	6.4	3	\$ 10.86	\$ 11.94	\$ 15.56	\$ 11.51	\$ 8.72	\$ 8.76	\$ 12.00	3								3	84%	79%	82%	82%	79%	86%	85%
4: Rex Hospital	4	11.3	13.4	8.9	10.9	11.5	12.1	13.5	4	\$ 9.41	\$ 7.60	\$ 12.09	\$ 10.25	\$ 9.00	\$ 8.55	\$ 11.00	4								4	86%	86%	79%	80%	76%	76%	85%
6: Crabtree	6				10.7	12.0	15.6	22.5	6				\$ 10.50	18.5	18.5	\$ 5.50	6								6				84%	86%	87%	85%
7: South Saunders	7	0.9	23.7	21.4	25.6	26.3	15.2	20.0	7	\$ 4.57	\$ 3.99	\$ 5.02	\$ 4.36	\$ 3.92	\$ 3.69	\$ 6.00	7								7	90%	93%	83%	81%	78%	84%	85%
7L: Carolina Pines	7L	12.9	15.0	12.1	10.9	16.6	15.1	6.4	7L	\$ 9.31	\$ 7.62	\$ 8.88	\$ 10.27	\$ 6.24	\$ 6.87	\$ 12.00	7L								7L	88%	93%	90%	86%	87%	86%	85%
9: Hillsborough	9					6.5	9.3	20.0	9					\$ 15.82	\$ 11.07	\$ 6.00	9								9					73%	79%	85%
11: Avent Ferry	11	14.6				20.5	16.1	20.0	11	\$ 8.26				10.2	10.2	\$ 6.00	11								11	68%				72%	76%	85%
12: Method	12	24.5	15.9	12.7	12.7	15.1	16.0	6.4	12	\$ 4.91	\$ 7.17	\$ 8.49	\$ 8.82	\$ 6.84	\$ 6.47	\$ 12.00	12								12	81%	83%	81%	83%	83%	85%	85%
17: Rock Quarry	17	14.8	15.3	13.8	13.9	15.3	17.2	12.0	17	\$ 7.53	\$ 6.59	\$ 7.81	\$ 8.02	\$ 6.75	\$ 6.01	\$ 12.00	17								17	78%	76%	60%	60%	56%	55%	85%
18: Poole-Barwell	18	8.8	9.2	8.7	8.2	9.1	11.0	6.4	18	\$ 11.35	\$ 10.34	\$ 12.42	\$ 13.66	\$ 11.40	\$ 9.45	\$ 12.00	18								18	81%	84%	62%	63%	58%	60%	85%
18S: Poole	18S			6.2	4.3	8.7	11.0	6.4	18S			\$ 17.29	\$ 26.14	\$ 11.86	\$ 9.44	\$ 12.00	18S								18S			75%	72%	72%	63%	85%
19: MLK-Sunnybrook	19	18.5	19.3	14.4	14.6	17.3	16.8	20.0	19	\$ 5.17	\$ 4.81	\$ 7.43	\$ 7.65	\$ 5.98	\$ 6.16	\$ 6.00	19								19	93%	94%	86%	87%	78%	79%	85%
20: Garner	20	9.7	7.9	9.8	11.3	14.6	16.3	12.0	20	\$ 11.61	\$ 13.71	\$ 10.94	\$ 9.93	\$ 7.06	\$ 6.33	\$ 12.00	20								20	84%	88%	82%	83%	77%	80%	85%
21: Caraleigh	21	40.6	43.4	35.9	35.1	37.5	41.1	20.0	21	\$ 1.81	\$ 1.62	\$ 2.98	\$ 3.18	\$ 2.76	\$ 2.52	\$ 6.00	21								21	82%	89%	80%	80%	80%	79%	85%
26: Edwards Mill	26	2.7	1.8	1.4	2.0	2.0	3.4	13.5	26	\$ 34.97	\$ 48.04	\$ 74.89	\$ 54.74	\$ 52.36	\$ 30.78	\$ 11.00	26								26	80%	85%	79%	80%	78%	73%	85%
27: Blue Ridge	27	2.6	1.8	2.8	3.4	2.5	3.5	13.5	27	\$ 34.40	\$ 45.73	\$ 39.02	\$ 32.81	\$ 41.44	\$ 29.38	\$ 11.00	27								27	89%	87%	82%	82%	80%	80%	85%
33: Knightdale	33	6.4	5.8	5.8	8.2	7.1	5.7	6.8	33	\$ 21.24	\$ 22.61	\$ 18.48	\$ 13.65	\$ 14.57	\$ 18.20	\$ 11.50	33								33	83%	83%	82%	79%	76%	74%	85%
36: Creedmoor	36	3.7	3.6	3.0	3.6	3.1	5.0	13.5	36	\$ 23.64	\$ 23.55	\$ 35.35	\$ 30.87	\$ 33.46	\$ 20.80	\$ 11.00	36								36	91%	92%	76%	80%	82%	79%	85%
70X: Brier Creek	70L				12.9	12.5	15.1	8.0	70L				\$ 8.71	\$ 8.49	\$ 6.84	\$ 12.00	70L								70L				61%	69%	64%	
FRX: Fuquay-Varina	FRX	3.8	4.0	3.0	4.1	2.9	3.6	9.0	FRX	\$ 70.56	\$ 61.18	\$ 36.11	\$ 27.42	\$ 35.49	\$ 29.12	\$ 11.00	FRX								FRX	62%	77%	66%	69%	60%	64%	85%
401: Rolesville	401	0.6	0.4					10.0	401	\$ 104	\$ 127					\$ 10.00	401								401	93%	94%					85%
GoCary																																
1: Crossroads (new)	1	7.4	7.8	10.1	8.3	7.5	7.1	6.8	1	\$ 12.35	\$ 10.70	\$ 9.72	\$ 12.17	\$ 13.28	\$ 14.03	\$ 11.50	1								1	95%	97%	92%	88%	87%	88%	85%
3: Harrison Ave	3	7.7	9.4	11.0	9.3	9.9	9.3	7.2	3	\$ 11.85	\$ 8.85	\$ 8.99	\$ 10.90	\$ 10.01	\$ 10.71	\$ 11.00	3								3	90%	95%	83%	83%	78%	78%	85%
4: High House Rd	4	5.4	6.4	7.8	6.9	6.5	5.8	7.2	4	\$ 16.91	\$ 13.13	\$ 12.61	\$ 14.59	\$ 15.34	\$ 17.12	\$ 11.00	4								4	89%	92%	91%	91%	90%	86%	85%
5: Kildaire Farm Rd	5	12.7	11.8	14.3	13.6	12.8	12.0	6.8	5	\$ 7.16	\$ 7.10	\$ 6.88	\$ 7.43	\$ 7.73	\$ 8.33	\$ 11.50	5								5	90%	94%	88%	87%	84%	83%	85%
6: Buck Jones Rd	6	6.9	7.5	10.4	8.6	7.6	6.2	6.8	6	\$ 13.24	\$ 11.15	\$ 9.45	\$ 11.70	\$ 13.09	\$ 16.21	\$ 11.50	6								6	94%	97%	91%	94%	93%	90%	85%
7: Weston Pkwy	7	4.0	5.3	6.4	5.9	5.5	5.5	7.2	7	\$ 22.95	\$ 15.80	\$ 15.35	\$ 17.19	\$ 18.09	\$ 18.13	\$ 11.00	7								7	95%	96%	93%	91%	90%	89%	85%
ACX: Apex-Cary	ACX	0.5	0.4	0.7	1.6	1.4	0.7	8.0	ACX	\$ 80	\$ 111	\$ 63	\$ 64	\$ 72	\$ 146	\$ 10.00	ACX								ACX	92%	94%	85%	89%	84%	67%	85%

No Wake Transit funding

In 18-month route development period

Meeting performance target

Missed target this quarter

Missed target for 3 or more consecutive quarters

* Route performance for FYs 2024 and 2025 is highlighted according to the current targets FY 2022 through FY 2026.