



On-Demand Microtransit 2025 Annual Report

OVERVIEW

The *2025 On-Demand Microtransit Annual Report* highlights the rapid growth of microtransit in North Carolina (NC) and showcases how each transit agency is customizing microtransit service to meet local needs.

Microtransit in NC began in September 2020, when the City of Wilson partnered with NCDOT to launch the RIDE service with just eight vehicles. This bold move marked a major shift from decades of traditional fixed-route transit in Wilson. Motivated by the desire to improve the rider experience, the City took a chance on a new, flexible transit model. The success of Wilson's pilot not only enhanced local mobility but also demonstrated the potential of microtransit statewide. Today, Wilson operates 21 vehicles, and 15 agencies across NC have introduced their own versions of microtransit.



RIDE Wilson Microtransit Vehicles

WHAT IS ON-DEMAND MICROTRANSIT?

A technology-enabled, public transportation system with flexible routing based on real-time trip demand and origin-destination patterns.

BENEFITS OF MICROTRANSIT

- Allows for spontaneous trips without advanced reservations, closing the convenience gap between driving and transit.
- Provides a convenient transit option in rural areas.
- Provides efficient and responsive service that improves rider mobility and access.
- Leverages payment and scheduling apps to improve rider experience.

PROGRESS MADE IN 2025

In 2025, new microtransit services launched across NC and microtransit ridership grew. Total microtransit trips taken in NC surpassed 1M since the first service launched in 2020. Through 2025, approximately 736K North Carolinians now have access to microtransit in their community.

Total ridership
for the year
(State FY 25)
533,266 rides

1.6M+
trips completed
statewide as
of 2025

~534,000
North Carolinians
have 5- to 60-minute
access to
on-demand transit

Services added in CY 2025:

- **ARRIVE** – Wilson County Transportation
- **CATS Micro** – Charlotte Area Transit System (CATS)
- **FLEX Ride** – Kerr Area Transportation Authority
- **Greenway** – Western Piedmont Regional Transit Authority
- **McDowell Express** – McDowell Transit

MICROTRANSIT SERVICE CHARACTERISTICS ADAPT TO LOCAL NEEDS



In 2025, 7 of the 15 microtransit services used new software on existing vehicles to enable on-demand microtransit (SaaS), while the others contracted with a third-party to provide turnkey service (TaaS) or provided both the software and transportation for their service.



Agencies used several different software providers, including CTS, Spare Labs, Via, and TransLoc.



State, local, and federal dollars were used for microtransit services, with Federal Transit Administration (FTA) dollars being the most common funding source.



The service area varied widely, ranging from a small 10.4 sq mi area for Smart Shuttle in the Town of Morrisville to a 376.1 sq mi area for Mobility on Demand in Orange County.



Service pick up and drop off varied with door-to-door provided in 8 of the 15 services, and curb-to-curb and virtual bus stops used in other services.



Service hours, advanced booking requirements, scheduling methods, and fares varied across services.

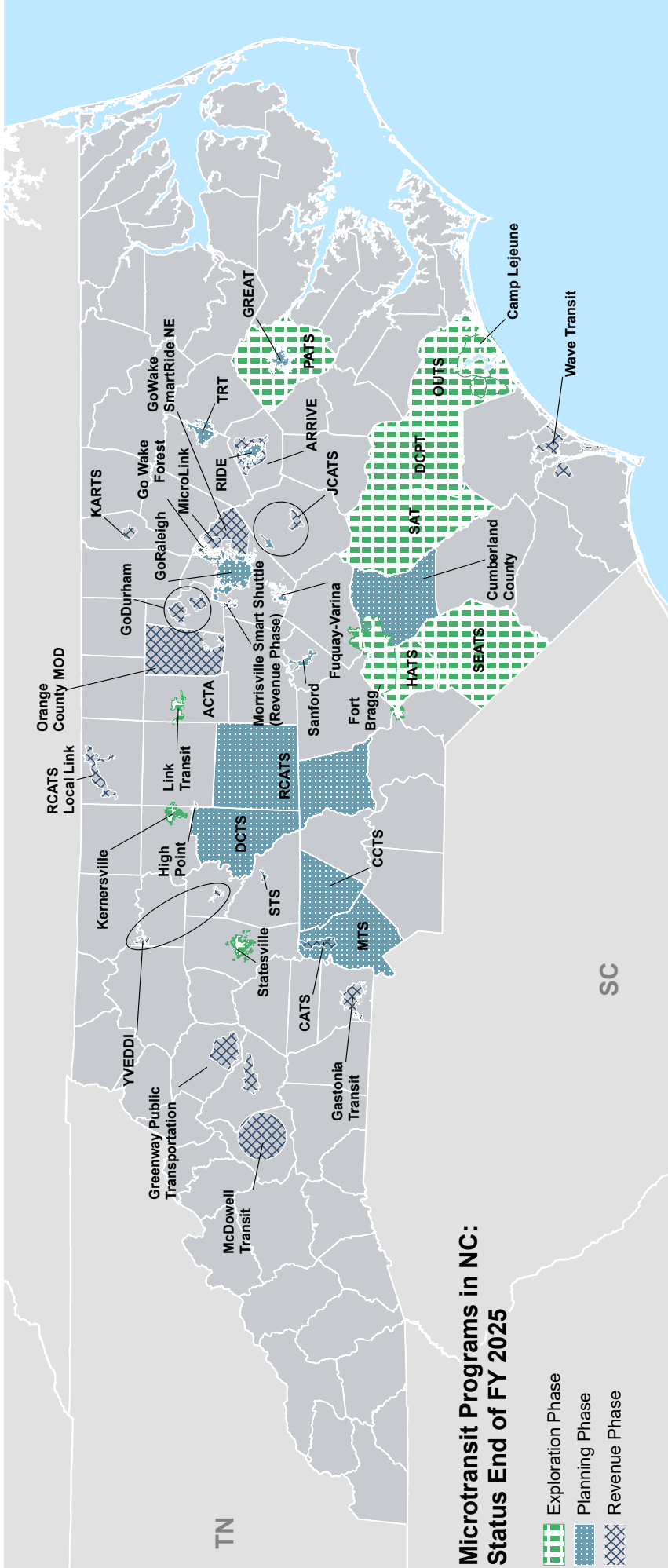
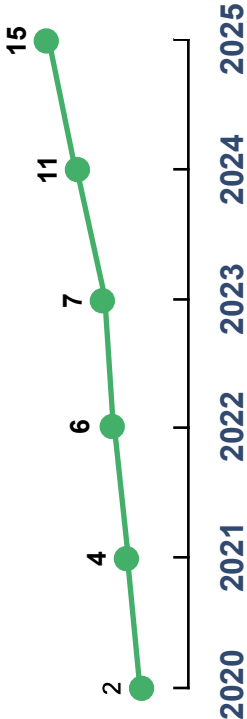
NCDOT'S INTEGRATED MOBILITY DIVISION (IMD) GUIDES MICROTRANSIT GROWTH & EVOLUTION

IMD, established in 2020, aims to increase access, enhance quality of life, and ensure safety. Microtransit supports these goals, and IMD has championed its expansion statewide. Key milestones include sponsoring an FTA Accelerating Innovative Mobility (AIM) grant to grow Wilson's 2020 pilot, securing a \$10.4M FHWA grant in 2022 for the "Mobility for Everyone, Everywhere" program (or MEE NC), and allocating \$600K in 2023 for feasibility studies.

MICROTRANSIT PROGRAMS IN NC

Since 2020, North Carolina has experienced substantial growth in on-demand microtransit services across the state. The map below illustrates each service and identifies its current project phase. The accompanying text below notes whether each service is designated as a MEE NC participant.

NC MICROTRANSIT GROWTH



Microtransit Programs in NC: Status End of FY 2025

- Exploration Phase
- Planning Phase
- Revenue Phase

The 2025 On-Demand Microtransit Annual Report highlights the following on-demand microtransit programs:

- ARRIVE – Wilson County Transportation*
- CATS Micro – Charlotte Area Transit System (CATS)*
- FLEX Ride – Kerr Area Transportation Authority (KARTS)**
- GO Transit – Yadkin Valley Economic Development District Inc. (YVEDDI)
- GoDurham Connect – GoDurham
- GoGastonia – Gastonia Transit
- Greenway – Western Piedmont Regional Transit Authority*
- McDowell Express – McDowell Transit**

- MicroLink – GoRaleigh
- Mobility On Demand (MOD) – Orange County Public Transit (OCPT)
- QuickRIDE – Johnston County Area Transit System (JCATS)*
- RIDE – City of Wilson*
- RideMICRO – Wave Transit (Cape Fear Public Transportation Authority)*
- Smart Shuttle – Town of Morrisville
- SmartRide NE – GoWake Access

* Service added in CY 2025
+ MEE NC participant