

# WHAT WE HEARD

## Statewide Mobility & Access to Opportunity

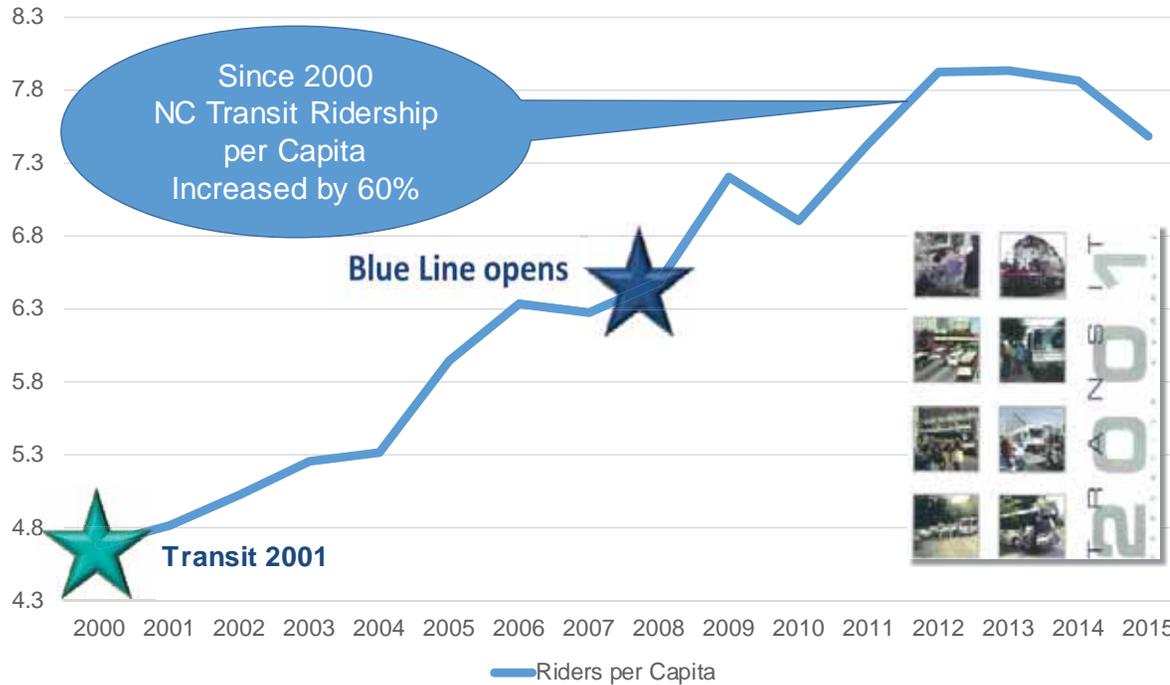


# WHAT WE HEARD

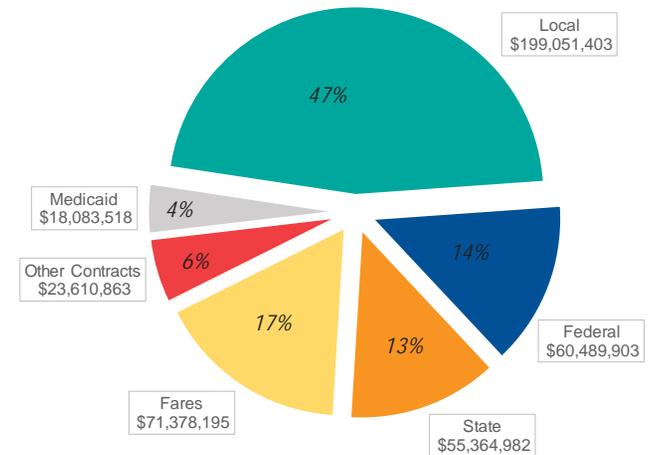
## North Carolina's Transit Success



### North Carolina's Transit Success



### FY 2016 North Carolina Transit Operations Revenue by Source



Source: Institute for Transportation Research and Education Urban and Community Operating and Financial Statistics

### FY 2016 North Carolina Transit Systems by Type

Urban Single City	Regional Urban	Small City Fixed Route	Consolidated Small City - Community	Consolidated Urban - Community	Regional Community	Single County Community	NC Total
17	2	1	1	6	5	68	100

# WHAT WE HEARD

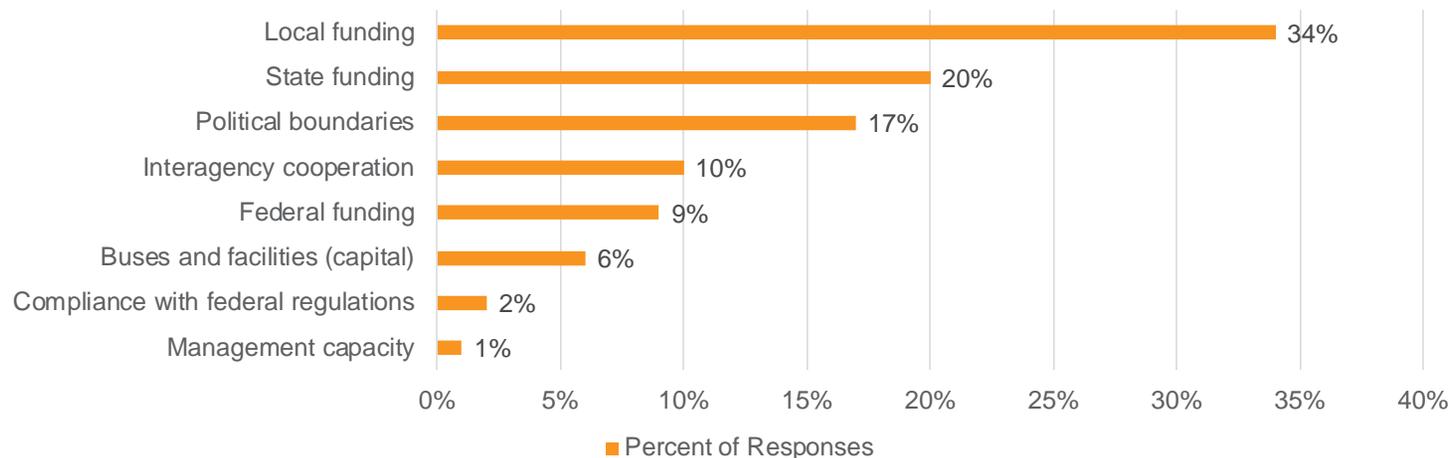
## Public Transportation Vision & Challenges



### Your Vision for Public Transportation in North Carolina

Category	# Responses	Examples
Extent of transit system	37	No-borders, Ubiquitous, Regional, Rural, Growing
Service characteristic	37	Frequent, Multi-modal, Fast, Innovative
Connected / Opportunity	28	Connected, Seamless, Coordinated, Options
Customer experience	28	Easy, Convenient, Useful, Liberating
Accessible / Inclusive	23	Accessible, Inclusive, Critical, Lifeline
System characteristic	21	Effective, Efficient, Successful
Service specific	18	Light Rail, High-Speed Rail, Commuter Rail, Greenways
Fares and affordability	9	Affordable, Single pay, Free
Total responses	206	

### Greatest Challenge Facing Public Transportation in North Carolina



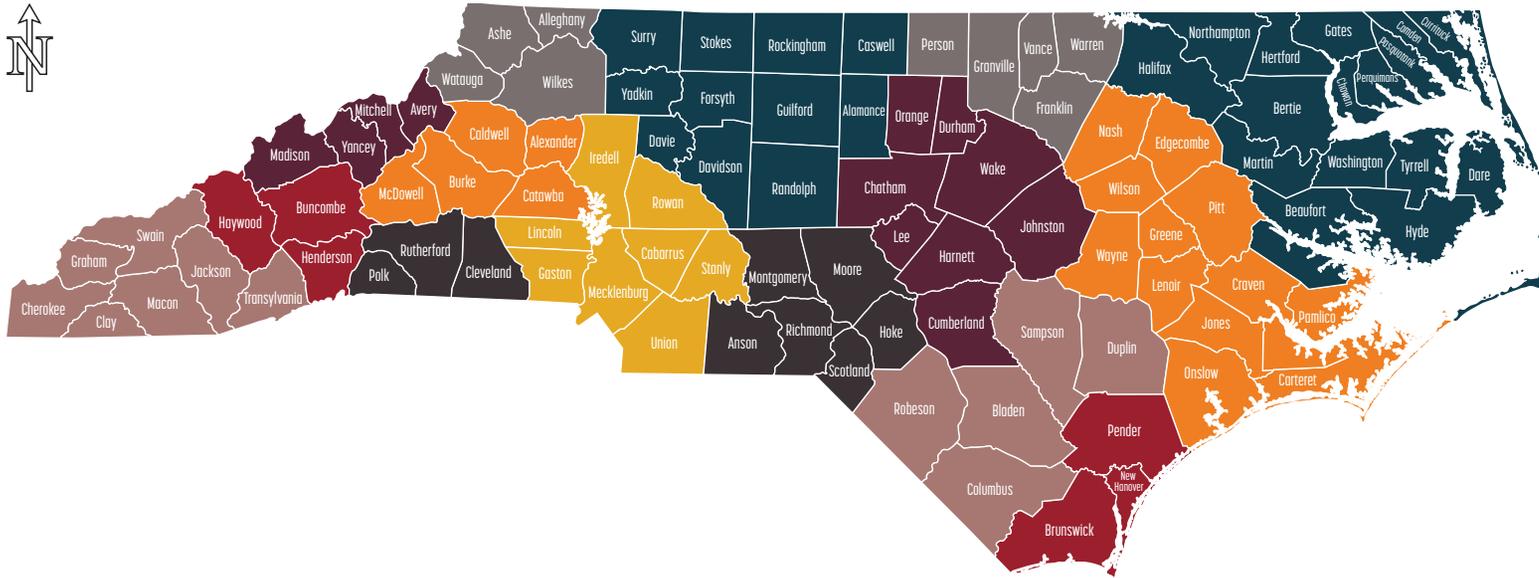
*\*Comments received at May 2017 community meetings.*

# WHAT WE HEARD

## May 2017 Community Meeting Comments



### Analysis Districts for Commuting and Transit Service Analyses



#### Analysis Districts

- Mountain South** Cherokee, Clay, Graham, Swain, Macon, Jackson, Transylvania
- Asheville** Haywood, Buncombe, Henderson
- Mountain Central** Madison, Yancey, Mitchell, Avery
- Mountain North** Ashe, Alleghany, Wilkes, Watauga
- Foothills** Polk, Rutherford, Cleveland
- Hickory** Caldwell, Alexander, Catawba, Burke, McDowell
- Piedmont** Surry, Yadkin, Davie, Stokes, Rockingham, Forsyth, Guilford, Alamance, Davidson, Randolph, Caswell
- Charlotte** Lincoln, Gaston, Iredell, Rowan, Cabarrus, Union, Mecklenburg, Stanly
- Sandhills** Anson, Montgomery, Richmond, Moore, Hoke, Scotland
- Eastern - South** Robeson, Columbus, Bladen, Sampson, Duplin
- Wilmington** Brunswick, New Hanover, Pender
- Triangle** Durham, Orange, Wake, Chatham, Lee, Harnett, Cumberland, Johnston
- Kerr** Person, Granville, Vance, Warren, Franklin
- Eastern Urban (US 70 / 264)** Wayne, Pitt, Greene, Lenoir, Jones, Onslow, Carteret, Wilson, Nash, Edgecombe, Pamlico, Craven
- Eastern - Northern** Halifax, Northampton, Hertford, Gates, Martin, Bertie, Chowan, Washington, Beaufort, Hyde, Tyrrell, Perquimans, Currituck, Camden, Pasquotank, Dare

### Strengths – Weaknesses – Opportunities – Challenges Count of Comments Received at May 2017 Community Meetings

Community Meeting	Northeast	Southeast	Triangle	Charlotte	Piedmont	Mountain North	Mountain South	Total
Strengths	26	19	56	31	27	105	49	313
Weaknesses	29	32	54	48	37	80	125	405
Opportunities	36	26	57	39	35	61	83	337
Challenges	25	17	52	32	29	51	78	284
<b>Total</b>	<b>116</b>	<b>94</b>	<b>219</b>	<b>150</b>	<b>128</b>	<b>297</b>	<b>335</b>	<b>1339</b>

# WHAT WE HEARD

## Strengths - Weaknesses - Opportunities - Challenges



S T R E N G T H S	Northeast	Southeast	Triangle	Charlotte	Piedmont	Mountain North	Mountain South
	Local coordination	Transit exists in each county	Independence	Service covers most major markets, hospitals and malls	Affordable	University support	Technology and service coordination (Ridgerunner)
	Bus drivers that care	Medicaid transportation coverage and funding	Better quality of life for elderly, disabled, and low income	Cost effective	Community benefit to economy, healthcare and other services	Supportive local government	Community engagement
	University transit improves campus experience	Access to employment for low-income	Easy connections between systems	State investment and support	Access to outside world	Life sustaining service	Growth

W E A K N E S S E S	Northeast	Southeast	Triangle	Charlotte	Piedmont	Mountain North	Mountain South
	Lack of system connectivity	Transit not capturing latent demand for employment and education	Fragmented, inconsistent, inconvenient, unequal	Stops are not always "user friendly"	Dangerous sidewalks or none at all	Very limited rural service	Urban/Rural Divide
	Cannot meet all transportation needs	Lack of political support	Poor coverage in rural areas	Inconvenient first mile /last mile	Not accessible to all disabilities	Wait times /frequency	City/County and County/County barriers
	Political boundaries	Cultural barriers to using transit	Confusing	Lack of connectivity	Not prepared for aging population	Development outpacing ability to provide services	Major arterials are dangerous for pedestrians

O P P O R T U N I T I E S	Northeast	Southeast	Triangle	Charlotte	Piedmont	Mountain North	Mountain South
	Utilize Uber and Lyft	Millennials support public transportation	Disabled community and the agencies that serve them	Become one system	Growth is coming	Autonomous vehicles	Branding and marketing of public transit
	Expand services to better serve communities	Attract choice riders	Growing urban population	Parking at market rates	Make the case to elected officials	Increase commuter service	Workforce transportation
	Interagency coordination to build networks	Park-and-ride hubs for transport to larger cities	New technologies (electric buses)	Build on success of Lynx line	Partnership with housing authority	Veterans transportation service	Regional transportation

C H A L L E N G E S	Northeast	Southeast	Triangle	Charlotte	Piedmont	Mountain North	Mountain South
	Lack of local government support	Financial sustainability	People have diverse needs	Increasing service costs	Unfriendly land uses/suburban sprawl	Gas tax shrinking	Lack of pedestrian infrastructure
	Decrease in rural population	Communities disconnected	Silo thinking	Aging population brings new challenges	Retail economy decline	Lack of empathy in society	Rural counties losing population and tax base
	Lack of communication between human service agencies and transit systems	Inadequate local match	Lack of capital funding	Traffic	Competition for same funding	Red tape	Funding cuts

\*Comments received at May 2017 community meetings.



# NEED FOR TRANSIT

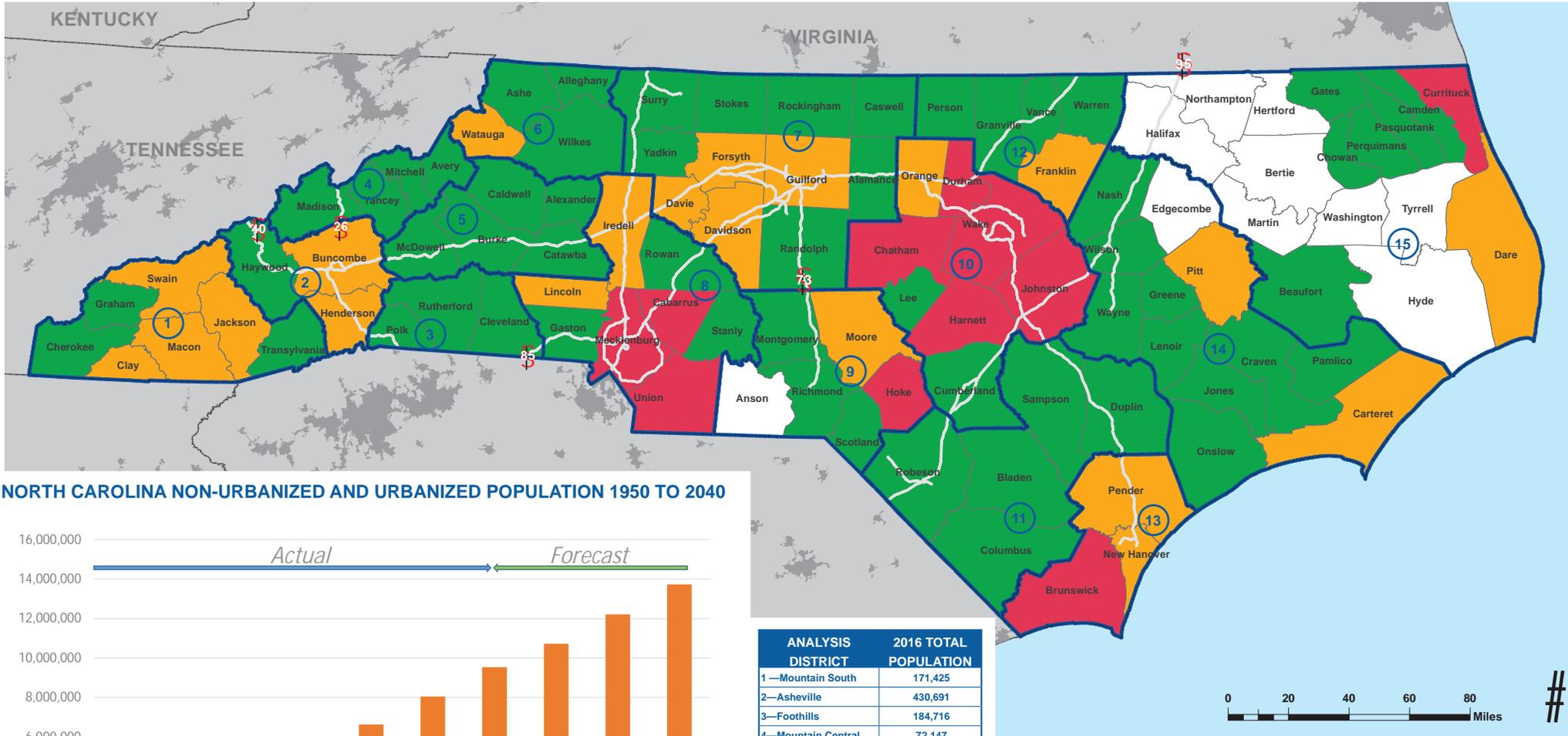
## Transit Demand Factors



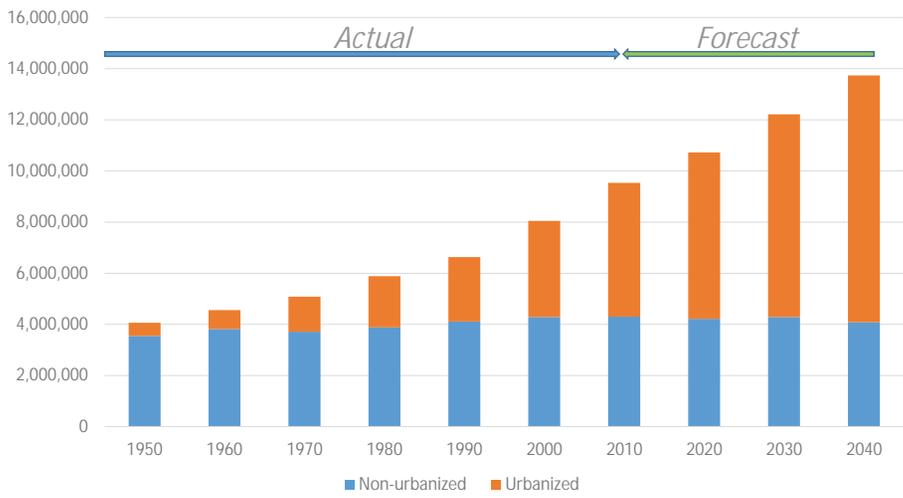
- Aging Population
- Low Income Population
- Households without Access to an Automobile
- Persons with a Disability
- North Carolinians without a Driver's License
- Increasing Traffic Congestion and Longer Commuting Distances
- Central City Population Growth
- Support Economic Development through Access to Jobs and Workforce Development

# NEED FOR TRANSIT

## Growth of Urban Population



**NORTH CAROLINA NON-URBANIZED AND URBANIZED POPULATION 1950 TO 2040**



ANALYSIS DISTRICT	2016 TOTAL POPULATION
1—Mountain South	171,425
2—Asheville	430,691
3—Foothills	184,716
4—Mountain Central	72,147
5—Hickory	387,865
6—Mountain North	160,698
7—Piedmont	1,680,655
8—Charlotte	2,153,877
9—Sandhills	284,111
10—Triangle	2,274,899
11—Eastern South	350,067
12—Kerr	228,336
13—Wilmington	407,633
14—Eastern Urban	998,143
15—Eastern North	362,154

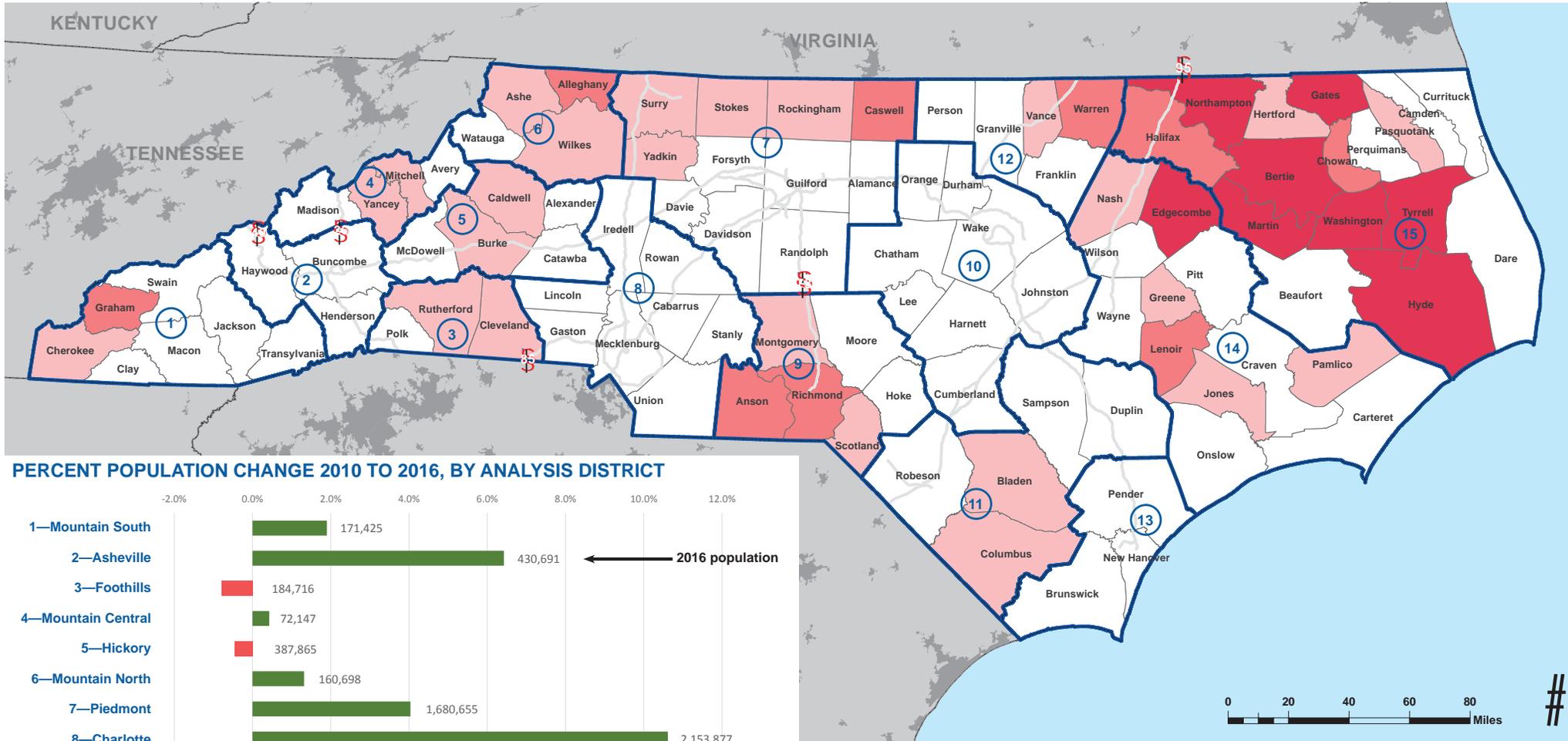
**Legend**

- Analysis Districts
  - NC Counties
  - Urbanized Area (Outside NC)
- Percent Population Change, 2010 to 2030**
- population loss
  - Stable and Growing (0 - 19.9%)
  - Rapid Growth (20 - 39.9%)
  - Extreme Growth (40 - 67.1%)

Source: 1950 to 2010—US Census; 2020 to 2040—County Forecasts Woods and Pool, with Urbanized Area Estimates by WRA

# NEED FOR TRANSIT

## Population Loss—2010 to 2016

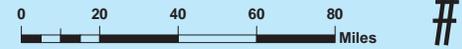


PERCENT POPULATION CHANGE 2010 TO 2016, BY ANALYSIS DISTRICT



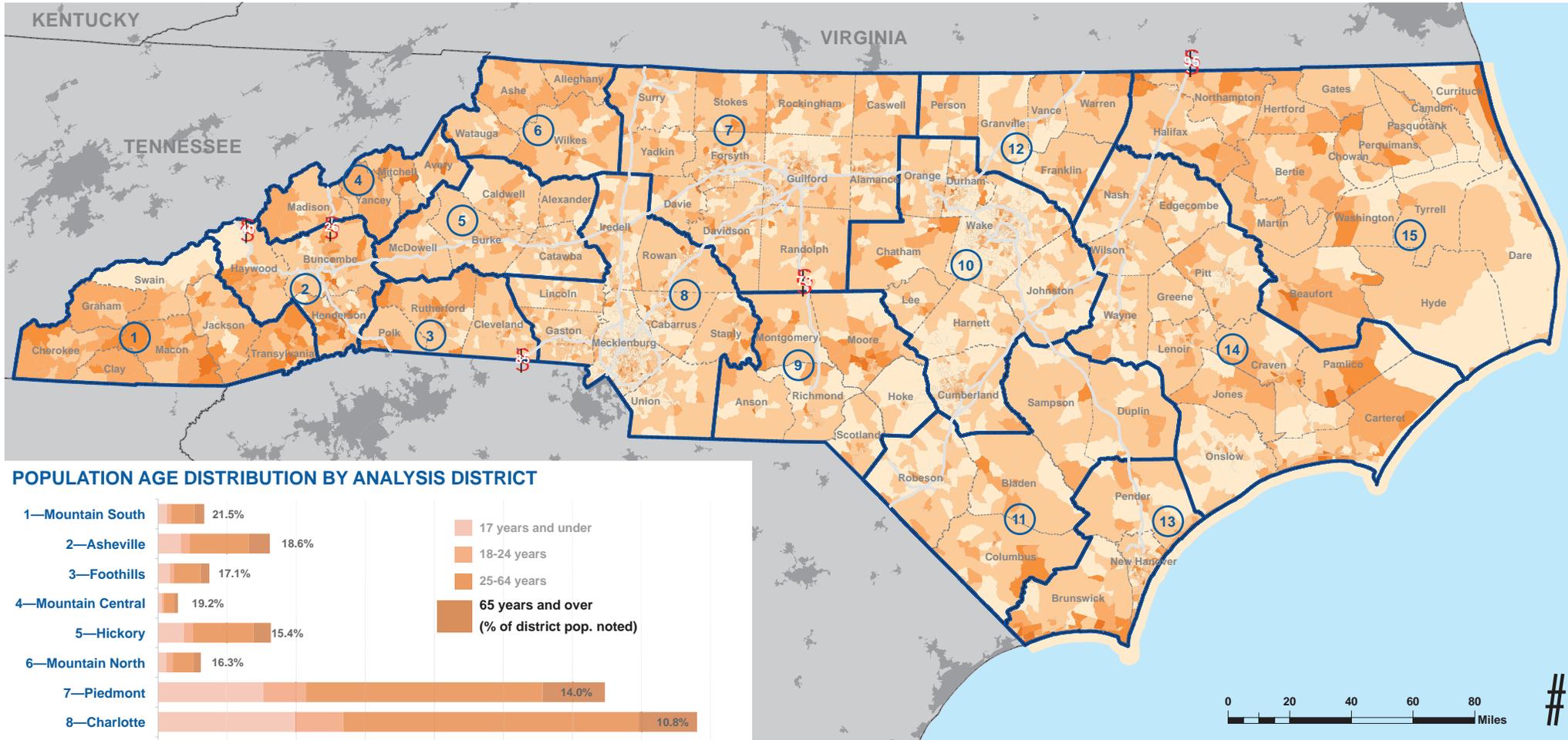
**Legend**

- Analysis Districts
- NC Counties
- Urbanized Area (Outside NC)
- 7.6% to -4%
- 3.9% to -2%
- 1.9% to 0%
- population growth

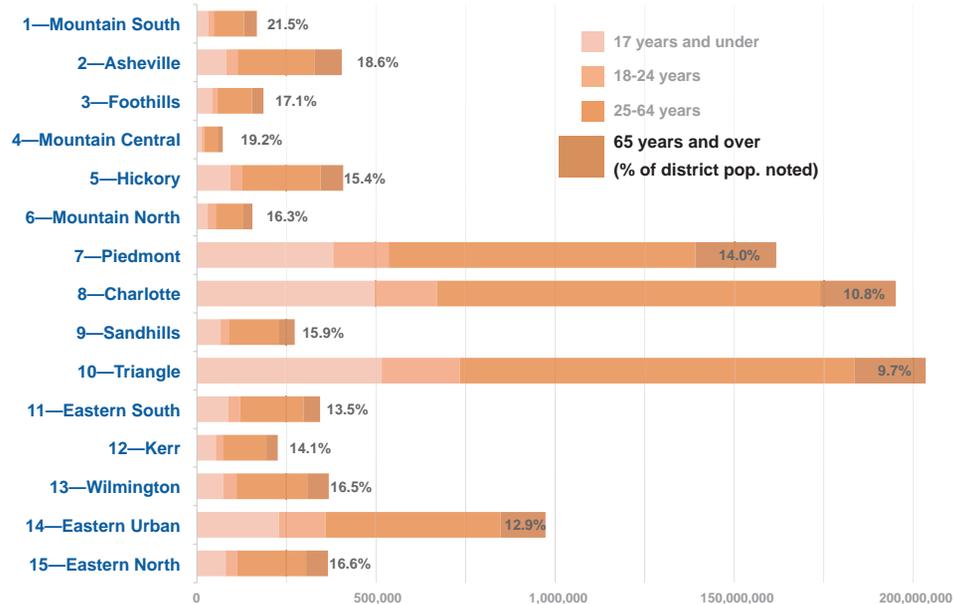


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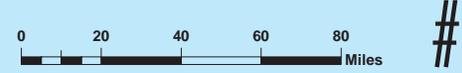
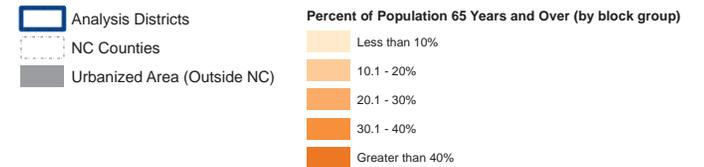
## Population 65 Years and Over



**POPULATION AGE DISTRIBUTION BY ANALYSIS DISTRICT**

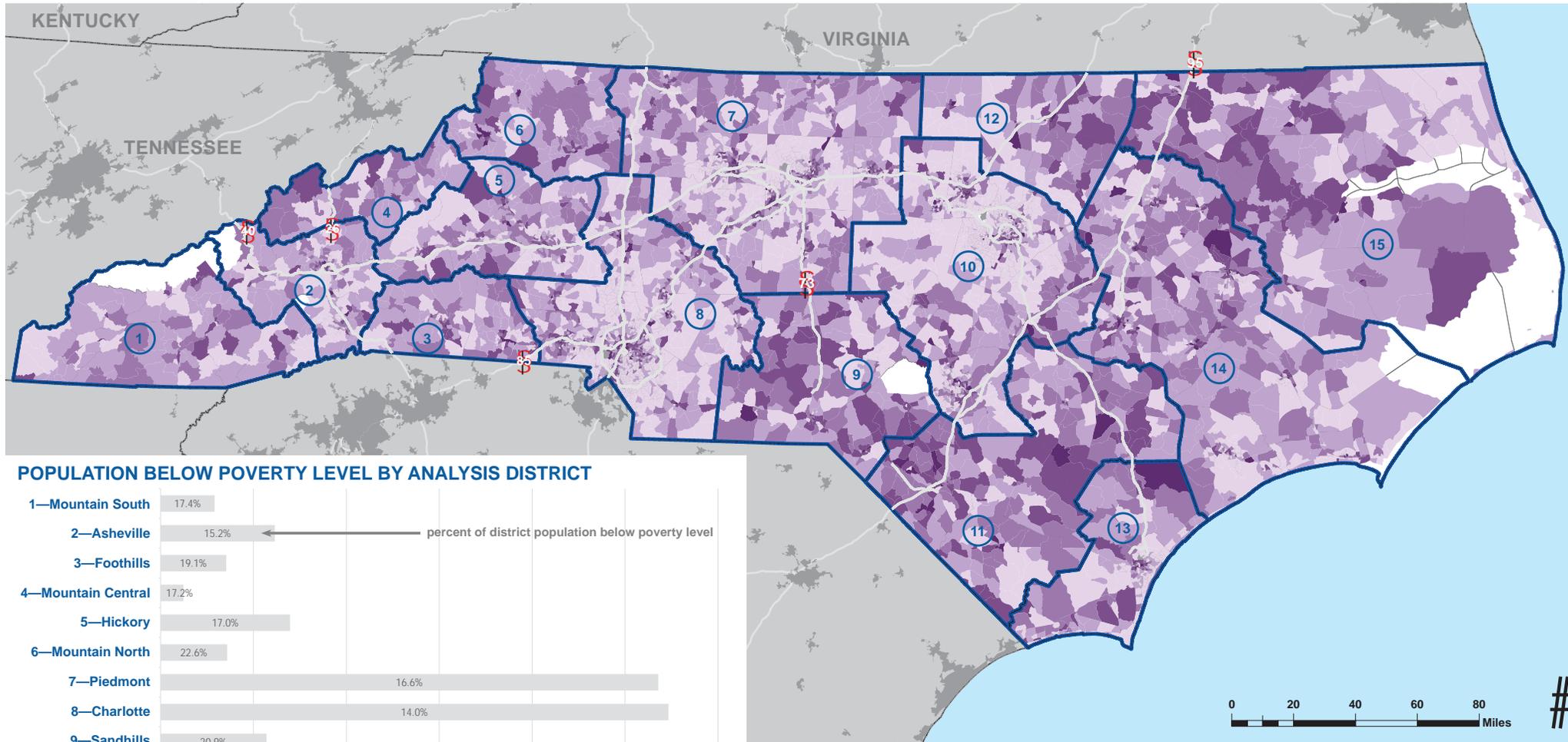


**Legend**

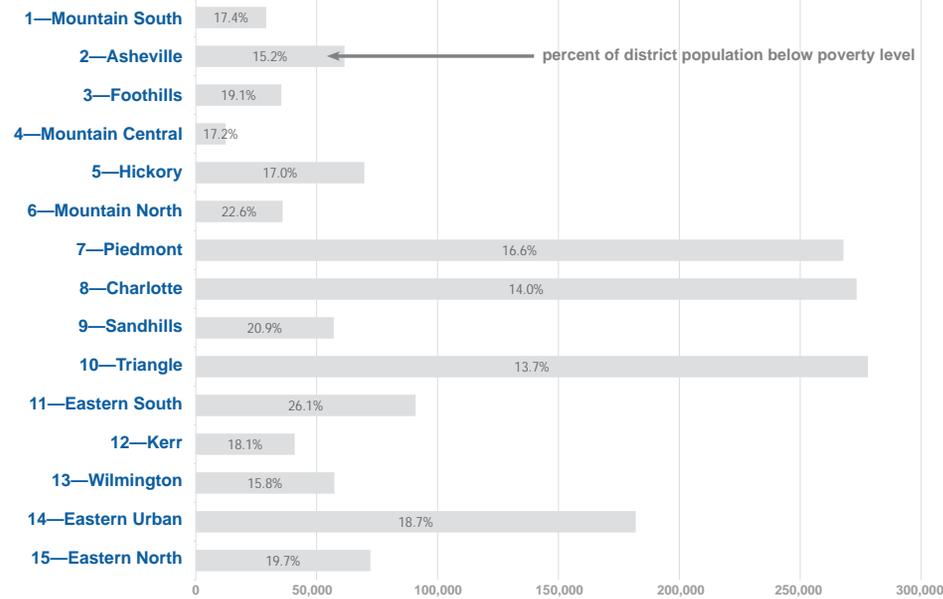


# NEED FOR TRANSIT

## Population Below Poverty Level



**POPULATION BELOW POVERTY LEVEL BY ANALYSIS DISTRICT**



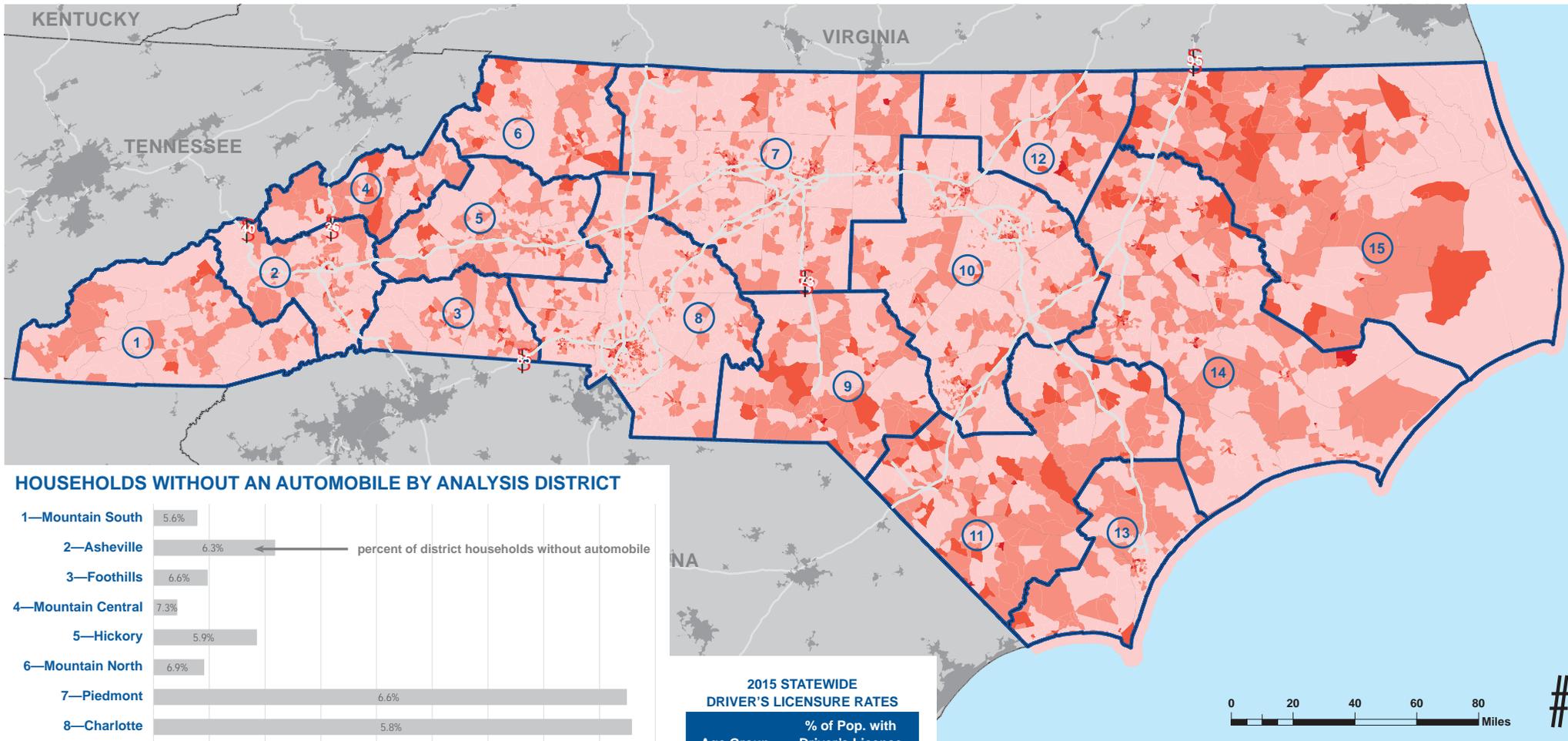
**Legend**

- Analysis Districts
- Urbanized Area (Outside NC)
- No Data
- Percent of Population Below Poverty Level (by block group)**
  - Less than 10 %
  - 10.1 - 20 %
  - 20.1 - 30 %
  - 30.1 - 50 %
  - Greater than 50 %

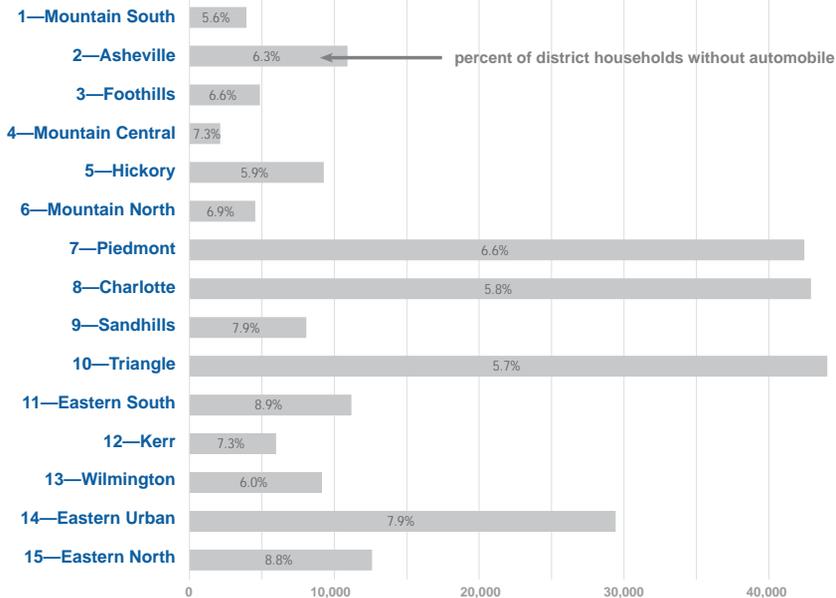


# NEED FOR TRANSIT

## Households Without Automobile



**HOUSEHOLDS WITHOUT AN AUTOMOBILE BY ANALYSIS DISTRICT**



**2015 STATEWIDE DRIVER'S LICENSURE RATES**

Age Group	% of Pop. with Driver's License
25 to 64	96%
64 to 74	92%
75+	79%

**ESTIMATED PERSONS OVER AGE 24 WITHOUT A DRIVER'S LICENSE**

Year	Estimate
2015	397,326
2036	597,648
<b>Change</b>	<b>50.4 %</b>

**Legend**

- Analysis Districts
- Urbanized Area (Outside NC)
- No Data

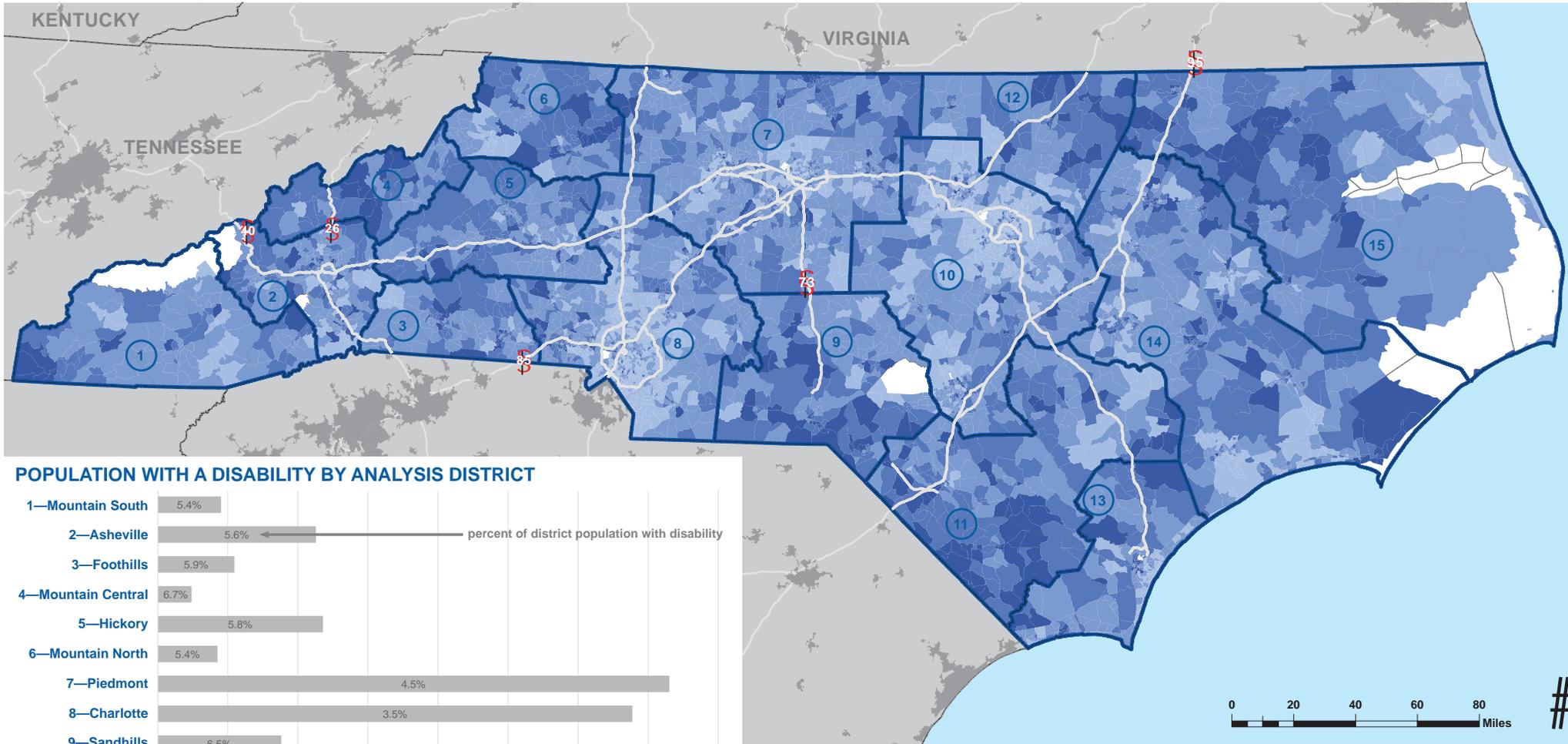
**Percent of Households without an Automobile (by census block group)**

- Less than 5 %
- 5.1 - 15 %
- 15.1 - 30 %
- Greater than 30 %

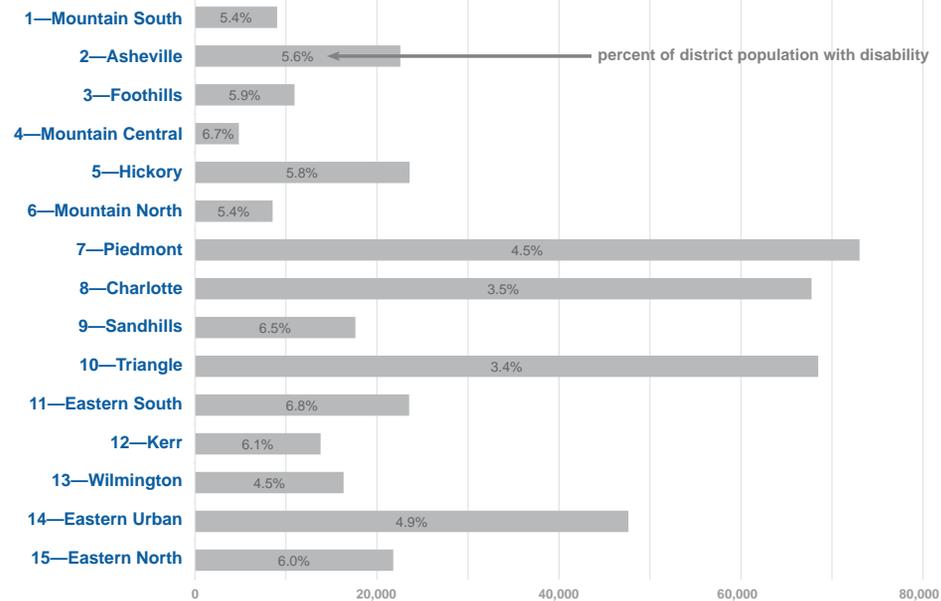


# NEED FOR TRANSIT

## Population With a Disability



**POPULATION WITH A DISABILITY BY ANALYSIS DISTRICT**



**Legend**

- Analysis Districts
- Urbanized Area (Outside NC)
- No Data

- Percent of Population With a Disability (by block group)**
- Less than 3 %
  - 3.1 - 6 %
  - 6.1 - 9 %
  - Greater than 9 %

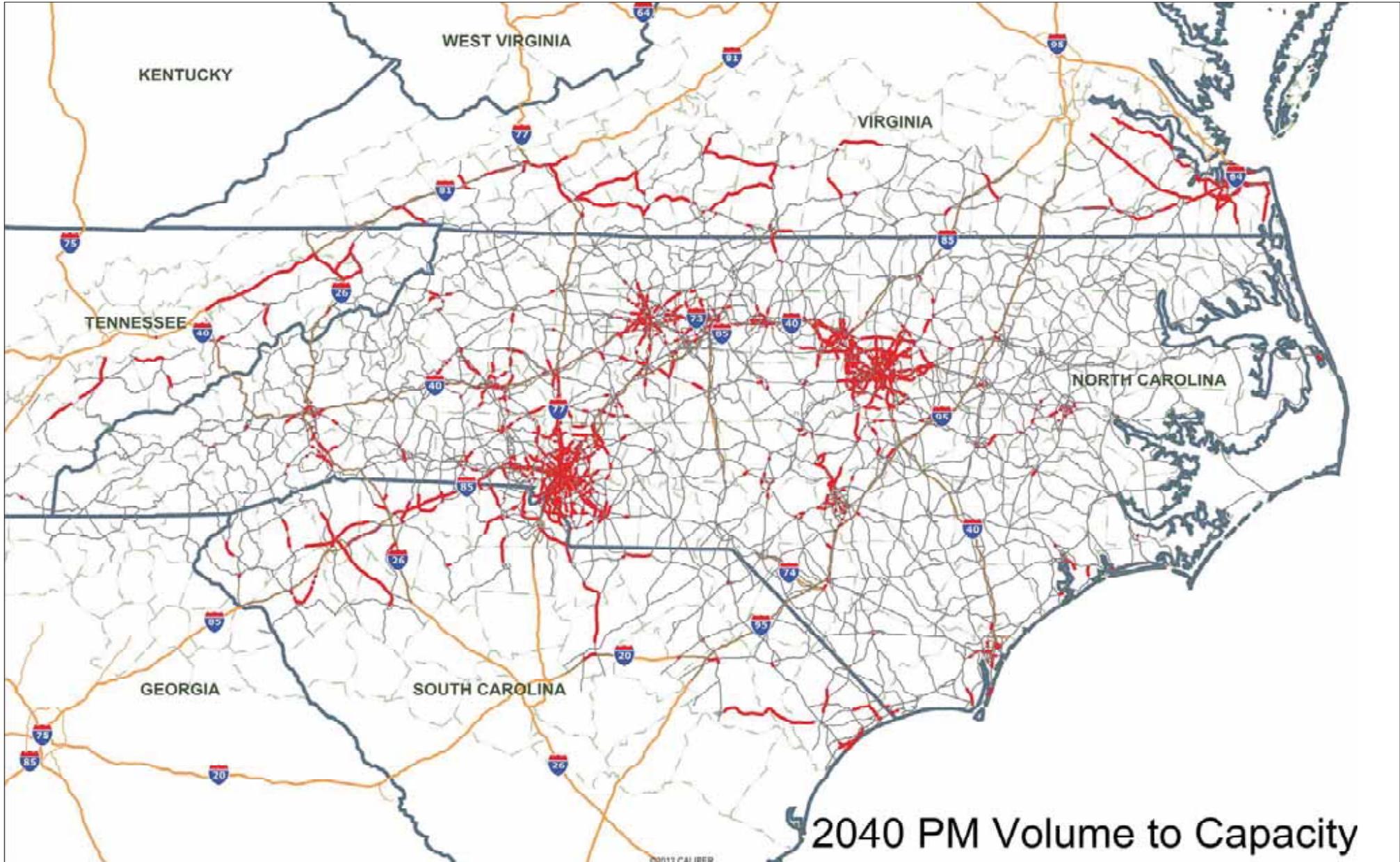


# NEED FOR TRANSIT

## Traffic Congestion



NORTH CAROLINA DEPARTMENT OF TRANSPORTATION  
**PUBLIC TRANSPORTATION STRATEGIC PLAN**  
*Connecting North Carolinians to Opportunities*





## **Vision:** *Connecting North Carolinians to Opportunities*

### **Missions:**

- Statewide Seamless Frequent Transit Network
  - Providing North Carolinians convenient access to employment, education, healthcare and recreation
- Improve the State's Quality of Life by:
  - Supporting economic development
  - Promoting healthy choices
  - Enabling independent living
  - Providing equality of access
- Increase Peak Period Capacity for Major Corridors

## STRATEGIES

- Connected statewide network
- Support growth of existing systems and new local services
- Increase people capacity for congested corridors
- Statewide transit brand
- Promote state and local partnerships
- Employ emerging technologies
- Embrace transit supportive land use policies



### Connected Statewide Network

- Aspirational yet possible
- Build upon intercity bus and rail programs
- Enhance current out of area services into state network of connected services
- Consolidation and Coordination of Public Transportation Systems (ConCPT) Program. Encourage coordination between providers for longer-distance trips spanning multiple transit system service areas
- Potential Corridors for FY 2018
  - Morehead City to Triangle
  - Clay County to Asheville
- Develop the preliminary map through October 2017 Community Meetings
- With a map, the transportation and community planners can focus infrastructure investments

### Promote State and Local Partnerships

- Formal State Partnerships
  - Department of Health and Human Services
    - Rural Health
    - Medicaid - Prepare for changes in Non-emergency Medical Transportation (NEMT)
    - Vocational Rehab
  - Veterans Administration
    - Durham, Asheville, Salisbury, Fayetteville
  - Department of Corrections
  - Healthcare Providers
- Informal Partnerships
  - Department of Community Colleges
  - Department of Commerce
    - Economic Development Partnership of North Carolina
  - Department of Environment and Natural Resources
  - Department of Natural and Cultural Resources
- Local Partnerships
  - UNC System Universities
  - 58 Community Colleges



### Support Growth of Existing Systems and New Local Services

- Grow current operating funding programs
  - State Maintenance Assistance Program (SMAP) with increased urbanized area populations
  - Rural Operating Assistance Program (ROAP) or other programs
- Support incremental increase in urban and rural services
- State funds for bus replacement
  - 10% of bus costs
- Assist communities to start new local systems

### Increase People Capacity for Congested Corridors

- Congested Corridor Multimodal Strategies
  - State sponsored multi-county commuter services
    - Charlotte, Triangle, Piedmont, Asheville
  - Focus on peak period mobility improvements
  - Identify incremental improvements such as park and ride lots and express buses
  - Travel Demand Management as an integral element for each corridor
- Faster Transit
  - Bus on Shoulder, Traffic Signal Preemption, Queue Jumper Lanes, HOV / Bus Lanes
  - Develop typical transit cross sections
- Multimodal Access Plans for New Developments of Statewide Significance
  - During access permit process, engage local governments and developers to provide for transit, pedestrian and bicycle access
- Major Transit Projects
  - Light Rail – Charlotte and Durham – Chapel Hill
  - BRT – Wake County Transit Plan and Chapel Hill BRT
  - Commuter Rail



### Statewide Transit Brand

- Develop common brand across the state
- Clear expectations for service delivery and quality
- Goes beyond compliance into a positive customer experience
- State resources for IT, management systems, and safety
- Enhance current efforts such as technology, safety and success plans

## Statewide Brand Implementation

### Community Transit Systems

- Thriving multi-county agencies
  - Coordinated agency services
  - General public service
  - Partners financial commitment
- Connected services
- Out of area services shared with other agencies
- Agency cooperation
  - Web site and social media
  - Call center
  - Pricing and fare collection
  - Service planning

### Urban / Regional Transit Systems

- Regional Collaboration
- Connected services
- Agency cooperation
  - Web site and social media
  - Call center
  - Pricing and fare collection
  - Service planning
- Partnerships
  - Community colleges
  - Human service agencies



### Employ Emerging Technologies

- Implement technologies that facilitate a connected statewide network
- Encourage and incentivize the deployment of new transportation technologies
  - Deploy alternative fuels and advanced technologies for increased efficiencies
- Connected autonomous vehicles can assist in the provision of mobility services
  - Increasing difficult to recruit and retain operators
  - Expand public transportation's reach to rural and low density communities
  - Improve safety, operating efficiencies and off-peak services
- Enhance customer service
  - Real time transit information
  - Regional call centers
- Develop databases and networks for active data management
- Utilize Bike Share, and ride-sharing services to extend the public transportation network's reach

### Embrace Transit Supportive Land Use Policies

- Support transit through complete streets and urban design as priorities
- MPO's and RPO's evaluate transit-oriented and transit-supportive development through the lens of regional and systems planning
- Support public transportation through local government land use policy and development regulations
- Improve planning coordination and integration
  - Siting schools and medical facilities
  - Linking housing development and transit in urban and rural areas

# Developing the Connected Statewide Network

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- Develop a statewide network map that transportation and community planners can use to focus infrastructure investments
- Build upon intercity bus and rail programs
- Enhance current out of area services into state network of connected services
- Connect community colleges, major healthcare and employment destinations
- Aspirational yet possible

# DISCUSSION FORUM

## Next Steps



### Public Transportation Strategic Plan Conceptual Work Plan





PUBLIC TRANSPORTATION

# STRATEGIC PLAN

*Connecting North Carolinians to Opportunities*



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<https://www.ncdot.gov/nctransit/strategicplan>