

Welcome

A strategic transportation plan connecting communities across North Carolina, focused on creating a more responsive, diverse, and inclusive transportation system for keeping people and freight moving safely and efficiently.



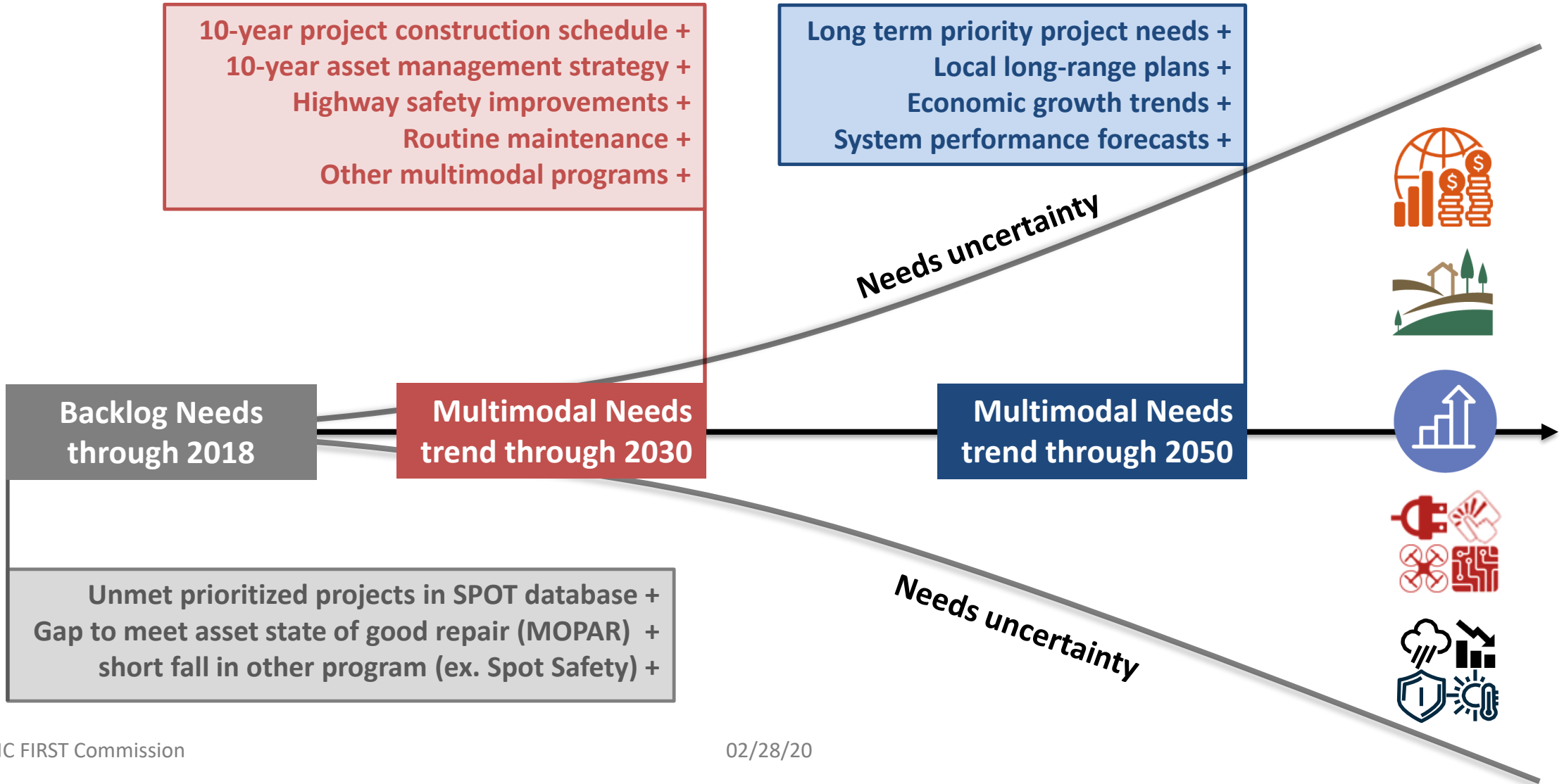
**NC MOVES** 2050

CONNECTING YOUR COMMUNITY,  
YOUR VOICE AND YOUR FUTURE

# Agenda Outline

1. Needs Assessment Context and Approach
2. Backlog and Needs Through 2050
3. Alternative Future Insights – State Revenue Impacts
4. Conclusions/Takeaways
5. Next Steps

# Multimodal Needs – Overall Approach

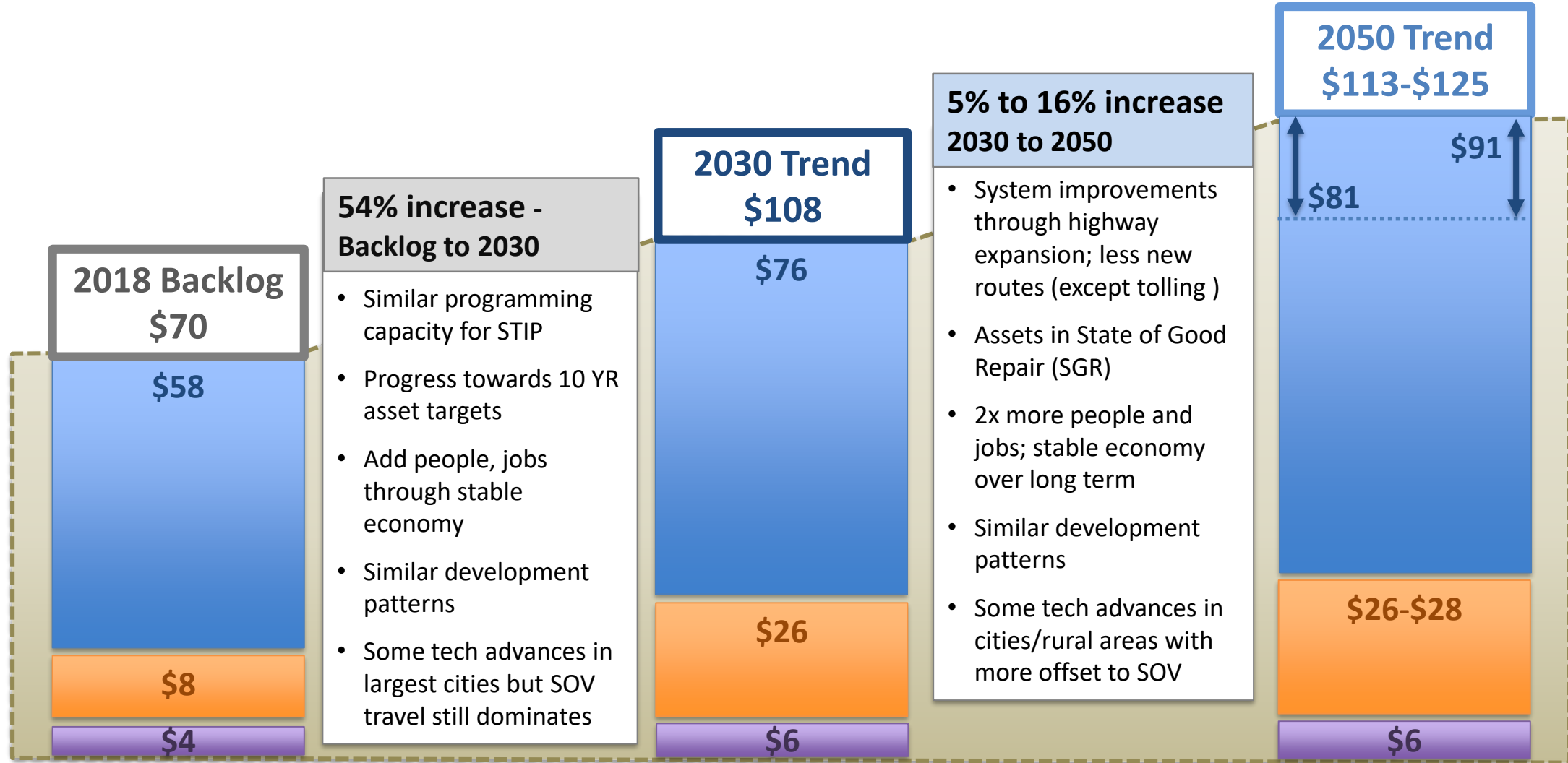


# Multimodal Needs – Categories

## Sources/Analysis (billions)



# Multimodal Needs Trend – Backlog to 2050 (billions)



# Influencing Assumptions – Trends vs. Baseline

## 2030 TREND

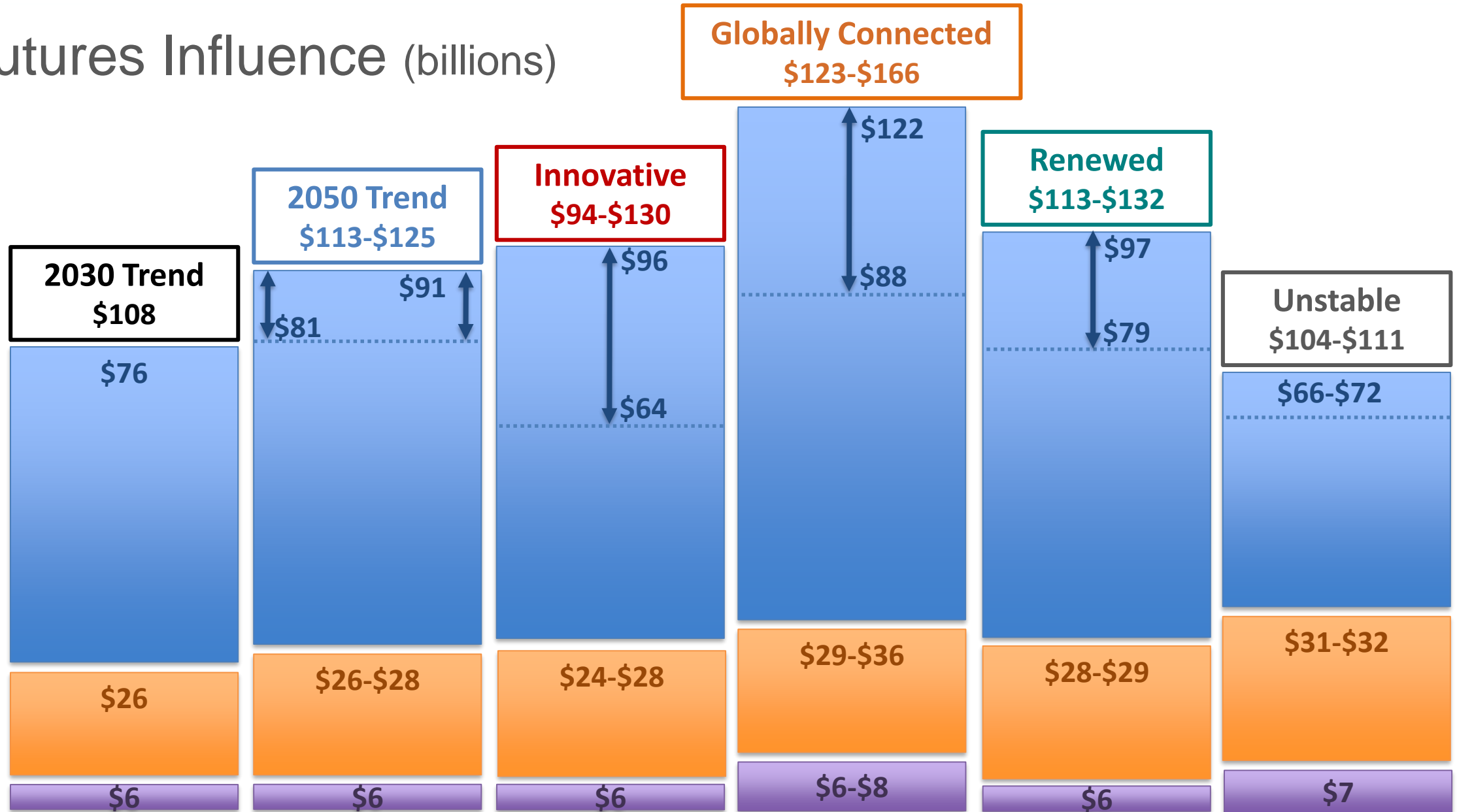


## 2050 TREND

- 1.8 million more people, 1.2 million more jobs drive demand
- 15% more passenger/truck miles traveled; 75% of freight travels by truck
- 22% increase in vehicle hours traveled elongates peak period congestion
- More regional & commuter-based transit, especially in Piedmont Crescent
- Network capacity grows relative to State Transportation Improvement Program
- Travel costs relatively the same

- 4 million more people, 2.5 million more jobs
- More retirees age in place; more development along coast, mountains
- 33-36% more passenger/truck miles traveled compared to baseline
- Freight volumes grow but shift slightly to other modes & move at higher speeds
- 60% increase in vehicle hours traveled leads to extensive peak hour congestion
- Technology enables a level of more efficient, seamless travel
- Network expands through highway improvements; some offset by more convenient, competitive non-highway travel options
- Travel costs uncertain

# Futures Influence (billions)

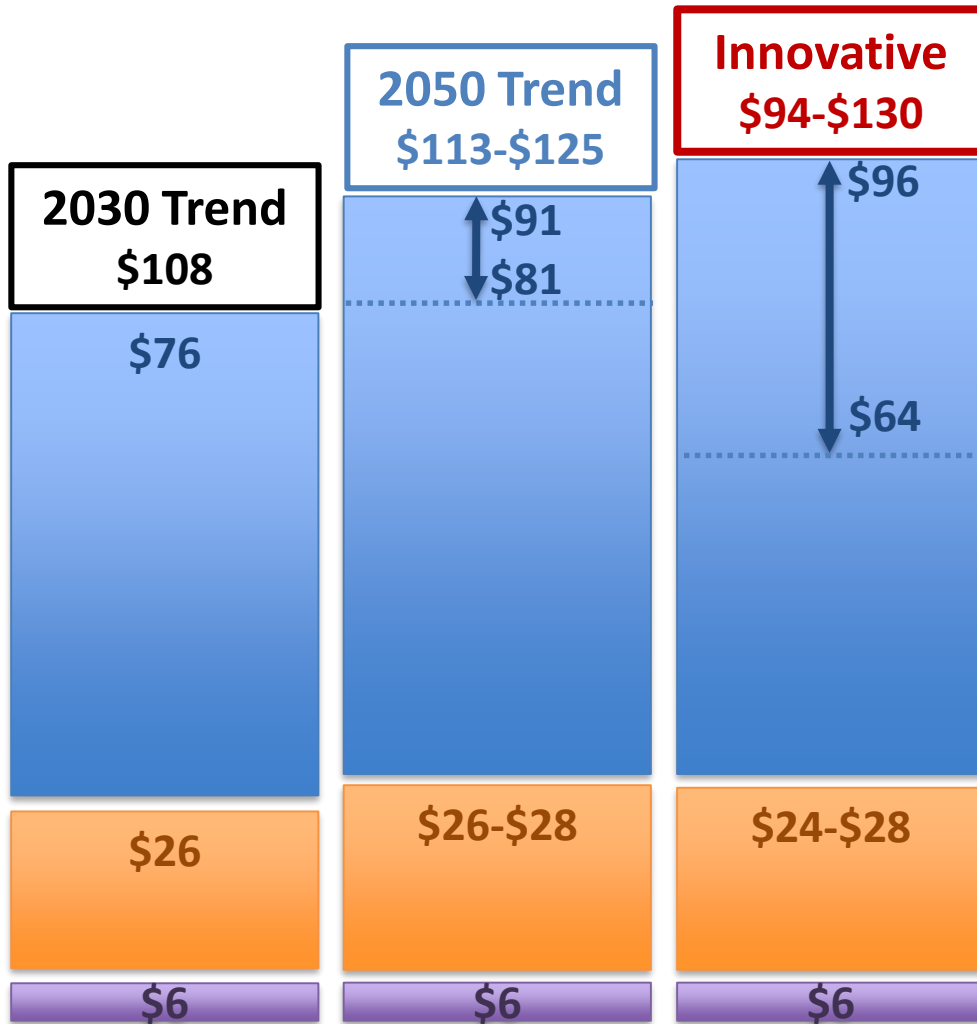


# Needs Forecasts (billions)



## INNOVATIVE

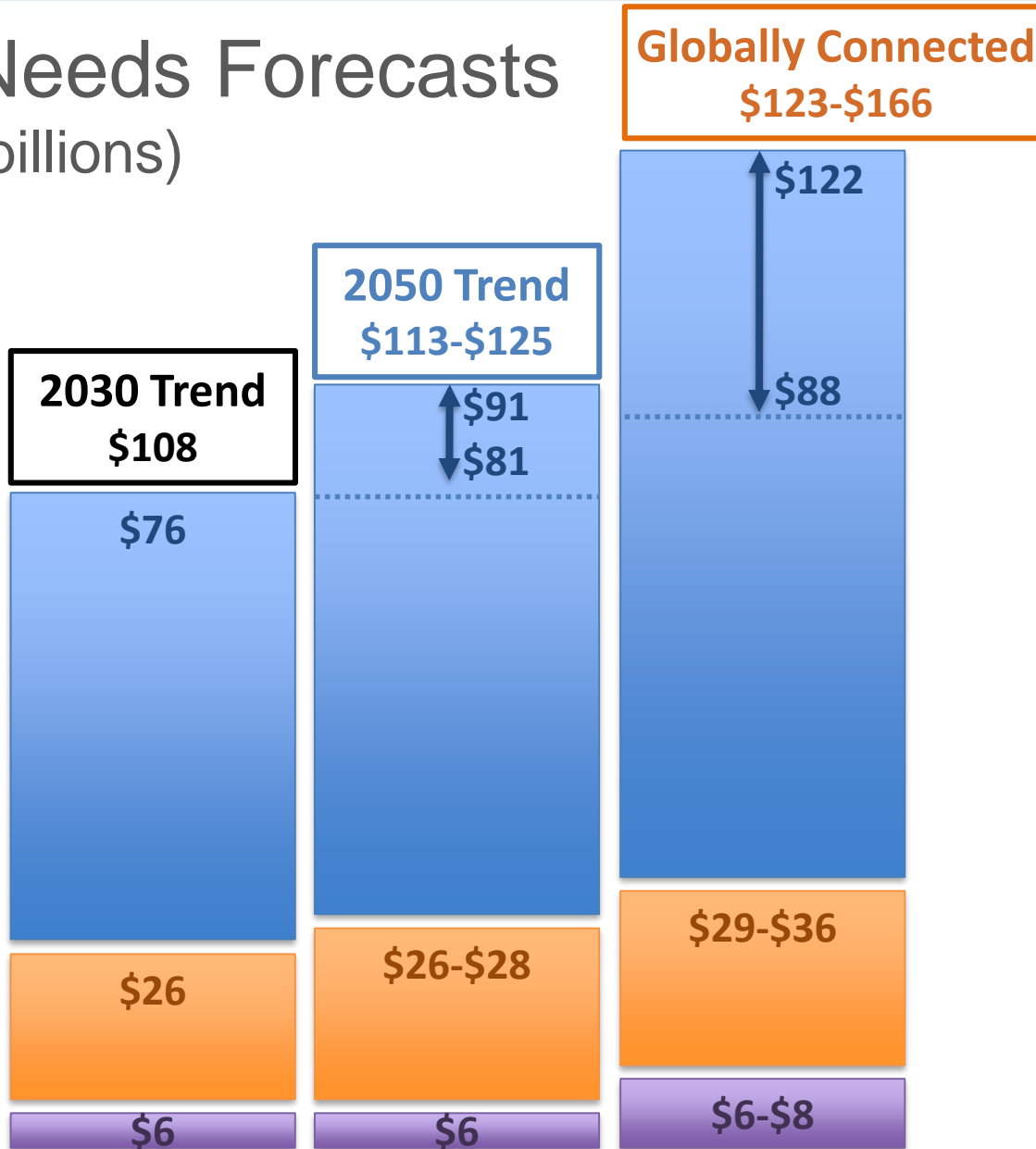
- Optimized, efficient transportation network reduces need for large scale highway expansion
- Communications technology enables more telecommuting, on demand services and deliveries reducing travel demand
- More opportunities for convenient, time competitive non-highway travel options
- Mobility as a Service (MaaS) drives down vehicle ownership levels; widespread use of electric vehicles



Indicators Compared to Trend				
Forecast	System Performance		Revenue Impact	
	Annual VMT (billions)	Non-Hwy Mode Share	MFT	Hwy Use Tax / DMV Fees
2050 Trend	152	>2-3%	↑	↑
INNOVATIVE	↘	↗	↓	↓



# Needs Forecasts (billions)

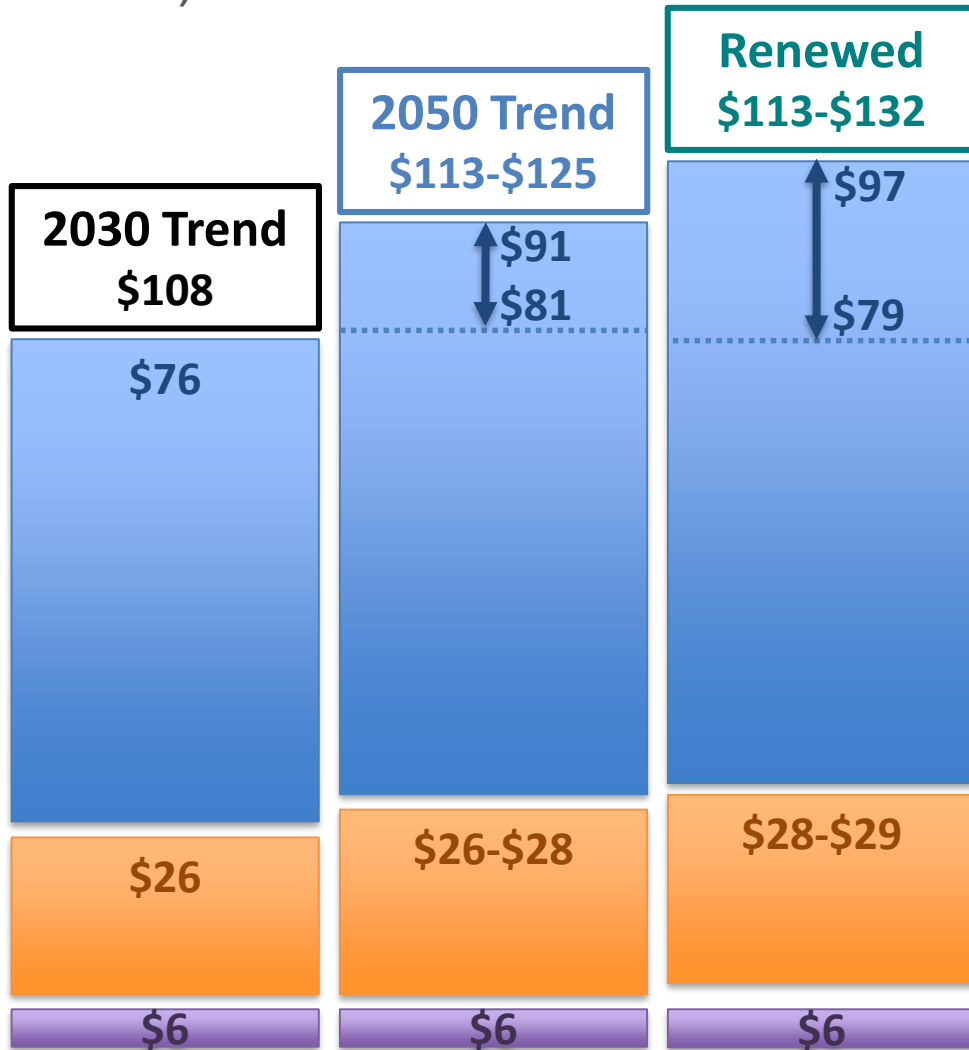


## GLOBALY CONNECTED

- Economic growth across sectors increases travel demand, particularly freight volumes
- Some travel demand and asset management needs offset by technology advances and more locally produced products; greater adoption of commercial electric fleets
- Significant needs increase compared to trend for both mobility and assets

Indicators Compared to Trend				
Forecast	System Performance		Revenue Impact	
	Annual VMT (billions)	Non-Hwy Mode Share		
2050 Trend	152	>2-3%	MFT	Hwy Use Tax
Globally Connected	↑	→	↗	↑

# Needs Forecasts (billions)



## RENEWED

- Growth in rural communities and small cities increases travel demand and need to support longer-distance travel
- Overall economic growth and an aging population require more multimodal options and improved local, regional connectivity
- Needs estimate comparable to trend with higher top-end to support growing rural economies

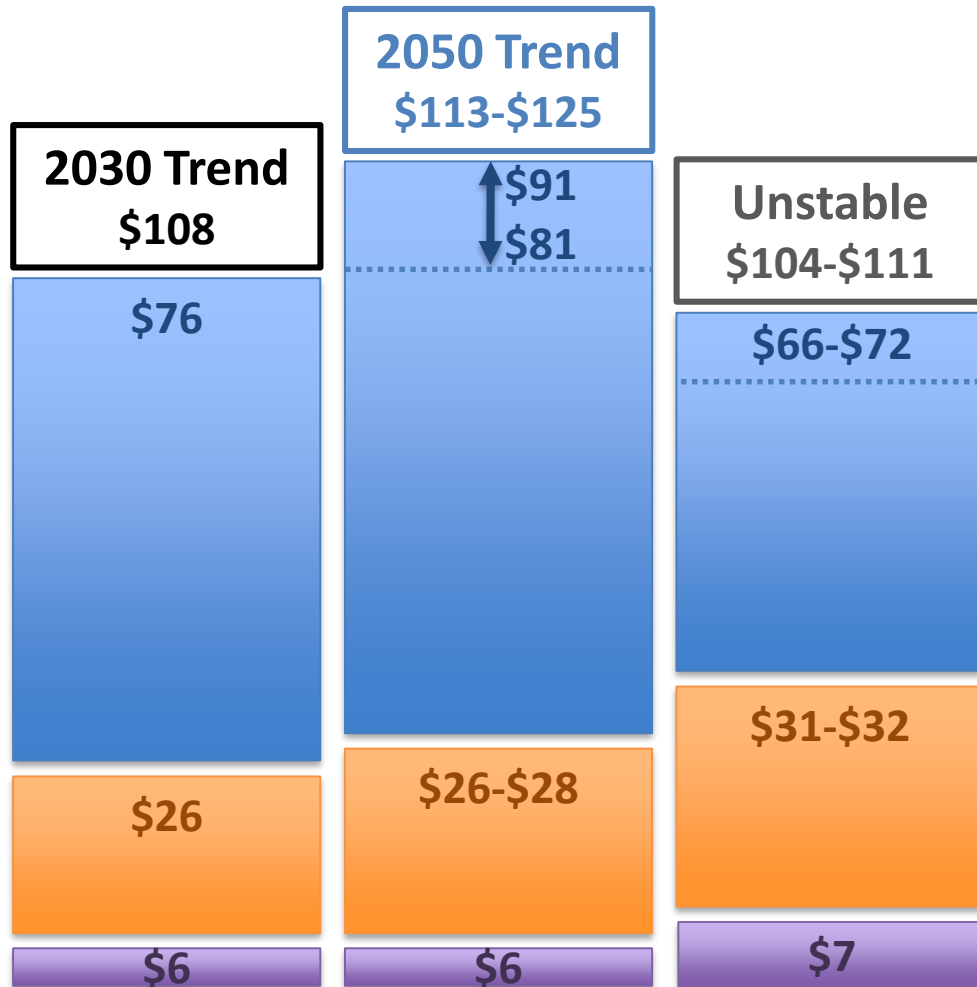
Indicators Compared to Trend					
Forecast	System Performance		Revenue Impact		
	Annual VMT (billions)	Non-Hwy Mode Share	MFT	Hwy Use Tax	DMV Fees
2050 Trend	152	>2-3%			
Globally Connected	↗	↗	↗	↑	↑

# Needs Forecasts (billions)



**UNSTABLE**





- Lower economic growth and travel demand relative to the trend results in less mobility needs; higher travel costs
- Asset management needs increase to address frequency and severity of weather events and other system disruptions
- Incremental increase in transportation management to improve system efficiency; greater reliance on other modes



Indicators Compared to Trend					
Forecast	System Performance		Revenue Impact		
	Annual VMT (billions)	Non-Hwy Mode Share	MFT	Hwy Use Tax	DMV Fees
2050 Trend	152	>2-3%			
Unstable	↓	↗	↓	↓	↓

# Revenue Impact Summary

## Near Term Considerations

Indicators Compared to All Futures					
Forecast	System Performance		Revenue Impact		
	Annual VMT (billions)	Non-Hwy Mode Share			
2050 TREND	152	>2-3%			
INNOVATIVE	↘	↗	↓	↓	↓
GLOBALLY CONNECTED	↑	→	↗	↑	↑
RENEWED	↗	↗	↗	↑	↑
UNSTABLE	↗	↗	↓	↓	↓

### 2030 Preparation

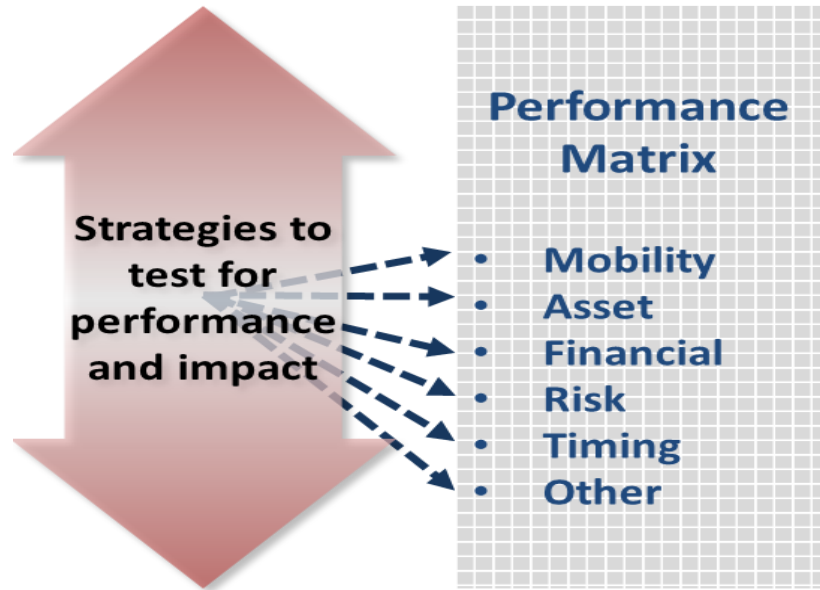
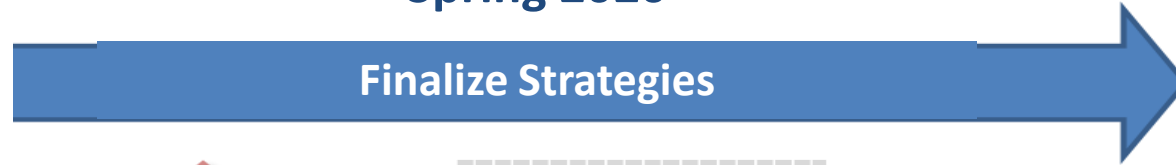
Incremental change

- More fuel-efficient trucks carry freight longer distances
- Increased adoption of electric vehicles
- Continued growth of transportation network companies (Uber, Lyft)
- Continued growth of on demand shipping and services (Amazon affect)

# NC Moves 2050 Plan Development

## Next Steps

Spring 2020



Robust decision-making framework aligning timing and cost with potential risk and implementation reality



# QUESTIONS