



AMERICA'S MOST FORWARD-MOVING REGION

RTA 2018 Triangle Mobility Report

WELCOME TO A GROWING COMMUNITY THAT WILL GROW ON YOU.

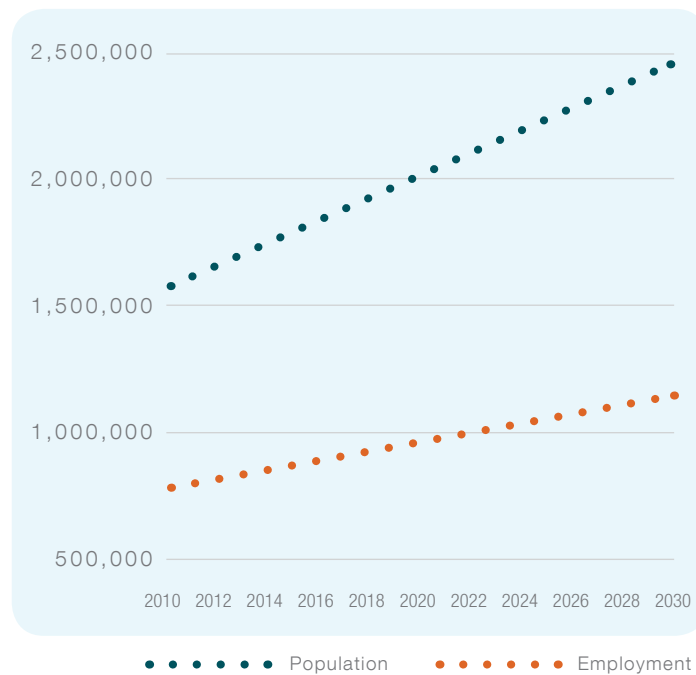
The Triangle market is one of the fastest-growing regions in the country, and we are consistently named one of the best places to live and work. In fact, Raleigh is the only U.S. city that has been named in the top 3 best places for business and careers by Forbes *for each of the past 15 years.*

FORBES 2017 BEST PLACES FOR BUSINESS AND CAREERS

1. Portland, OR
- 2. Raleigh, NC**
3. Seattle, WA
4. Denver, CO
5. Des Moines, IA
6. Provo, UT
7. Charlotte, NC
8. Austin, TX
9. Atlanta, GA
10. Dallas, TX

This report highlights where we have been and where we intend to go with enhanced regional mobility to ensure that our market maintains its competitive advantage as we grow.

TRIANGLE GROWTH PROJECTIONS



Source: Triangle Regional Model, v5

URBAN LAND INSTITUTE 2018 U.S. MARKETS TO WATCH

1. Seattle, WA
2. Austin, TX
3. Salt Lake City, UT
- 4. Raleigh/Durham, NC**
5. Dallas, TX
6. Ft. Lauderdale, FL
7. Los Angeles, CA
8. San Jose, CA
9. Nashville, TN
10. Boston, MA

U.S. NEWS & WORLD REPORT 2017 BEST PLACES TO LIVE

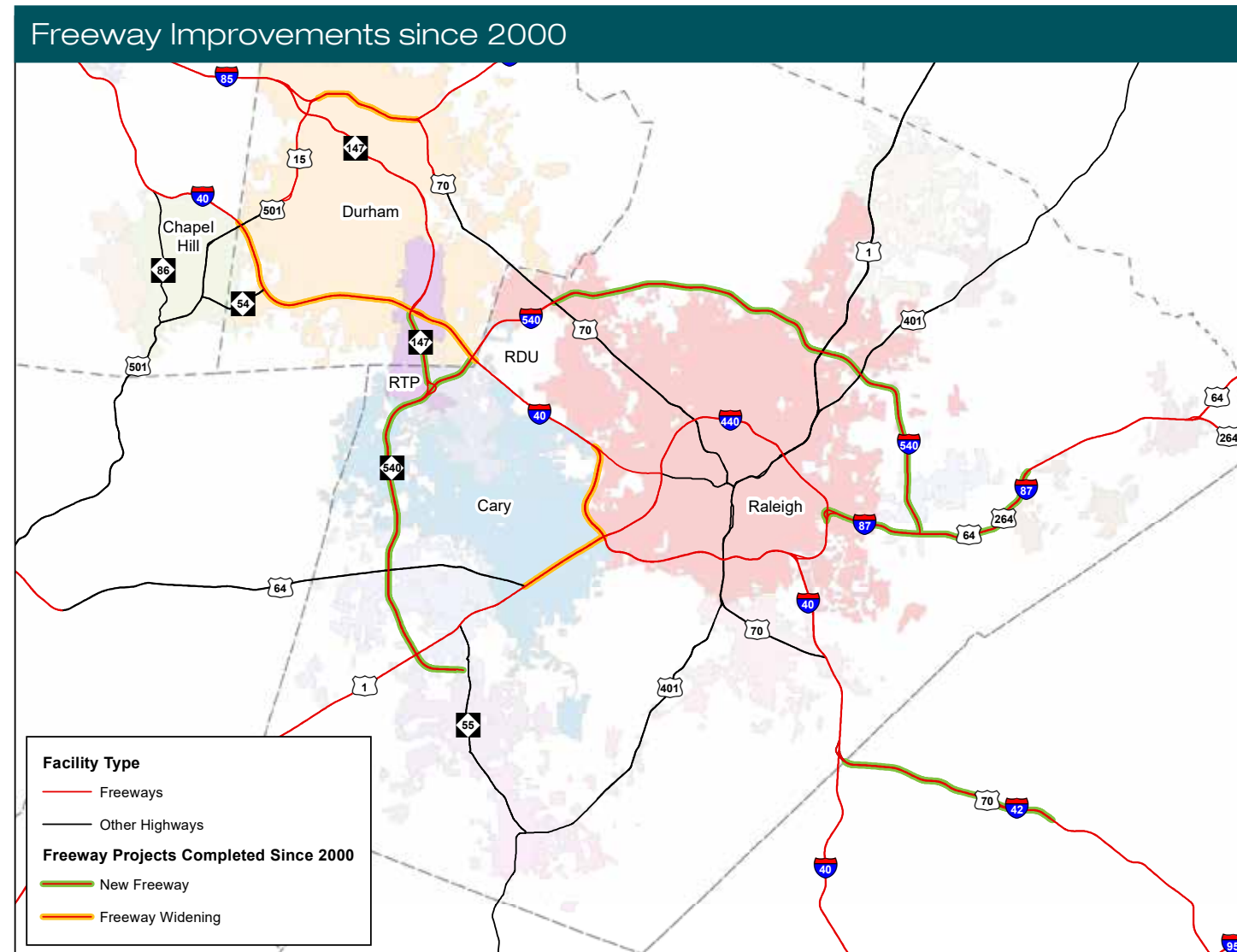
1. Austin, TX
2. Denver, CO
3. San Jose, CA
4. Washington, DC
5. Fayetteville, AR
6. Seattle, WA
- 7. Raleigh & Durham, NC**
8. Boston, MA
9. Des Moines, IA
10. Salt Lake City, UT



WE HAVEN'T SAT STILL, BECAUSE WE DON'T WANT TO SIT STILL.

Our high-growth region has been prioritizing investment in key transportation corridors and far-reaching policies for several years. For example, we have added more than 50 miles of new freeways just since 2000.

50 MILES
OF NEW FREEWAY
SINCE 2000.



SELECTED MAJOR HIGHWAY IMPROVEMENTS SINCE 2000:

- Opening of I-540, the Raleigh Outer Loop freeway in North Raleigh
- Widening of I-40 between Cary and Raleigh, relieving the region's top bottleneck
- Widening of I-85 in Durham
- Creation of NC 147/540 "Triangle Expressway" toll system
- Development of new I-87 freeway to I-95 north

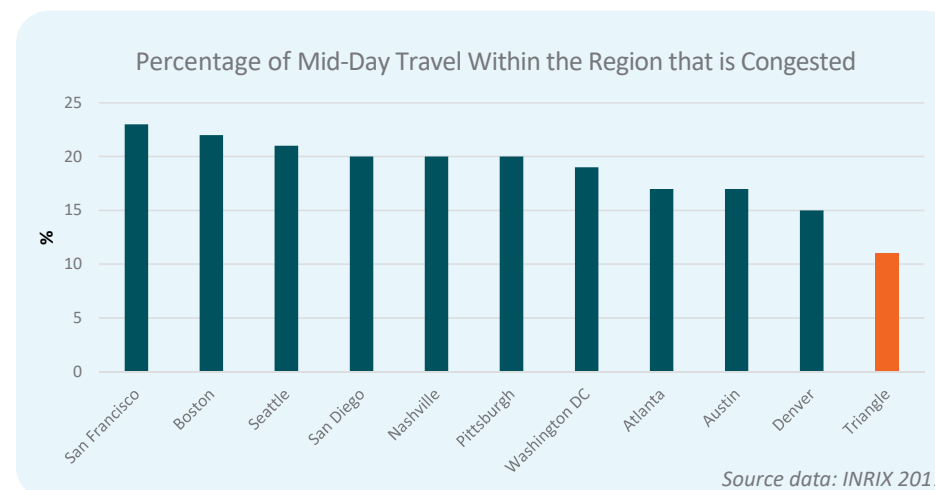
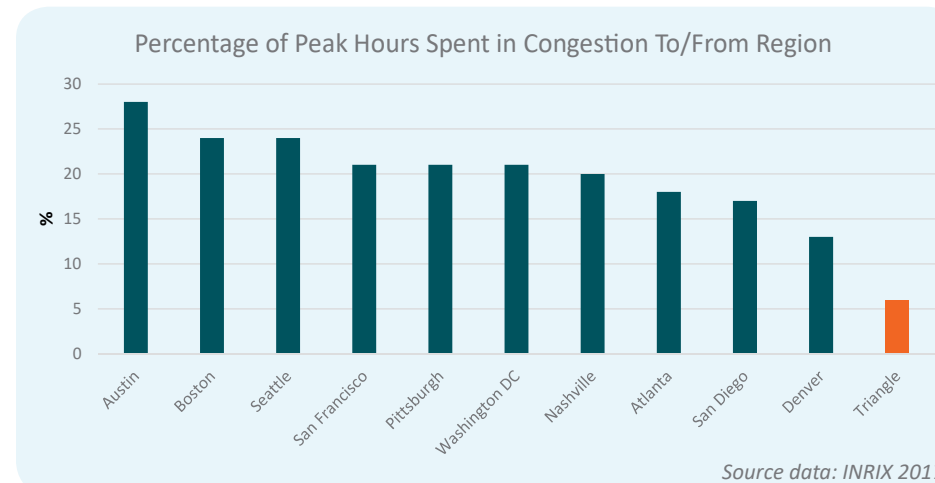
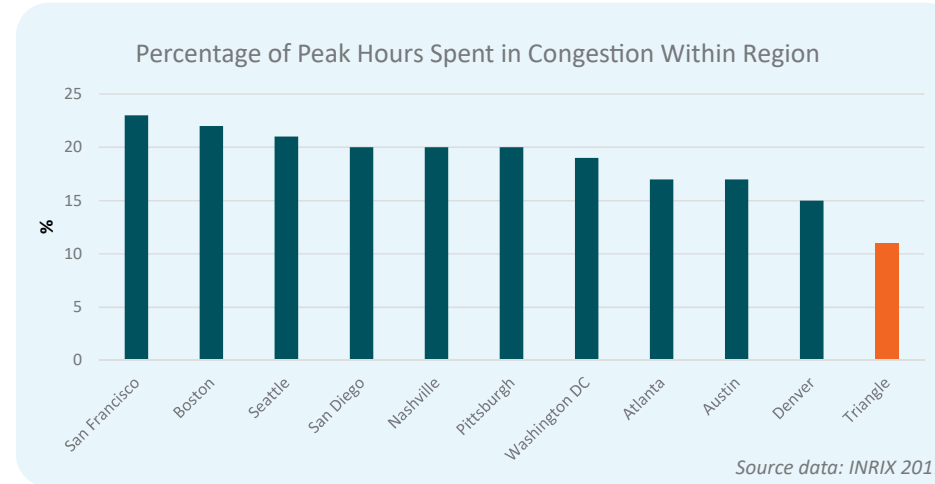
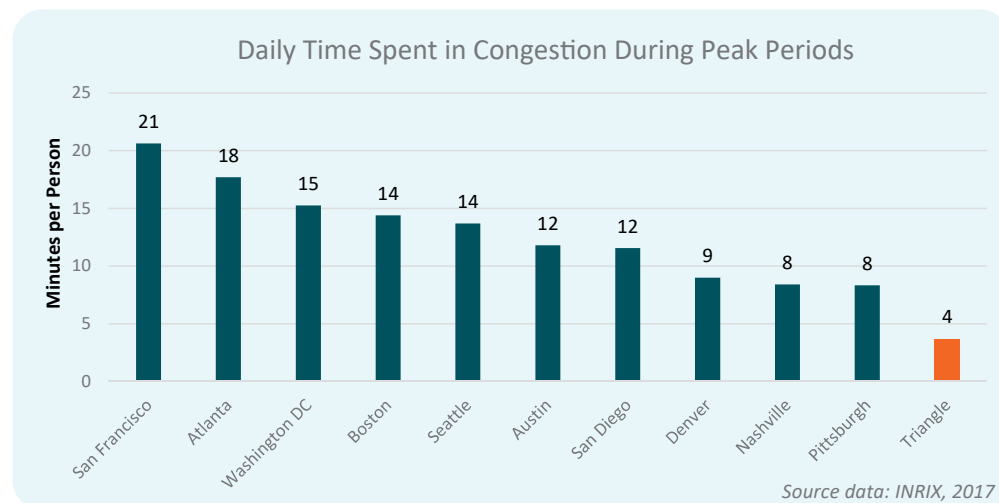
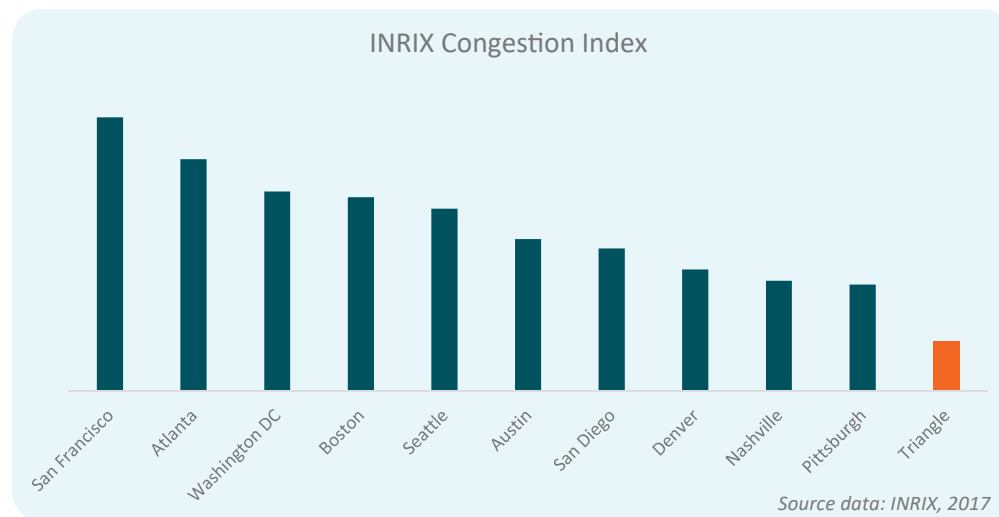
A STATEWIDE, DATA-DRIVEN APPROACH AND ENHANCED STATE FUNDING HAVE ADVANCED KEY PROJECTS.



GROWING UP, WITHOUT GROWING CONGESTION.

The majority of our peer markets with analytics, technology, and life sciences clusters have higher traffic congestion index rankings and overall delay – both during rush hour periods and throughout the day.

LESS THAN
5 MINUTES
SPENT IN
PEAK PERIOD
CONGESTION
PER PERSON
EACH DAY.



THE TRIANGLE
HAS **LOWER CONGESTION**
AT ALL TIMES OF
DAY COMPARED
WITH MOST PEER
MARKETS.

IF WE BUILD IT, THEY CAN COME.

Our market will be adding more than 40 miles of new freeway over the next 10-12 years — including an expansion of the most advanced turnpike in America — along with dozens of miles of highway widening and modernization projects.

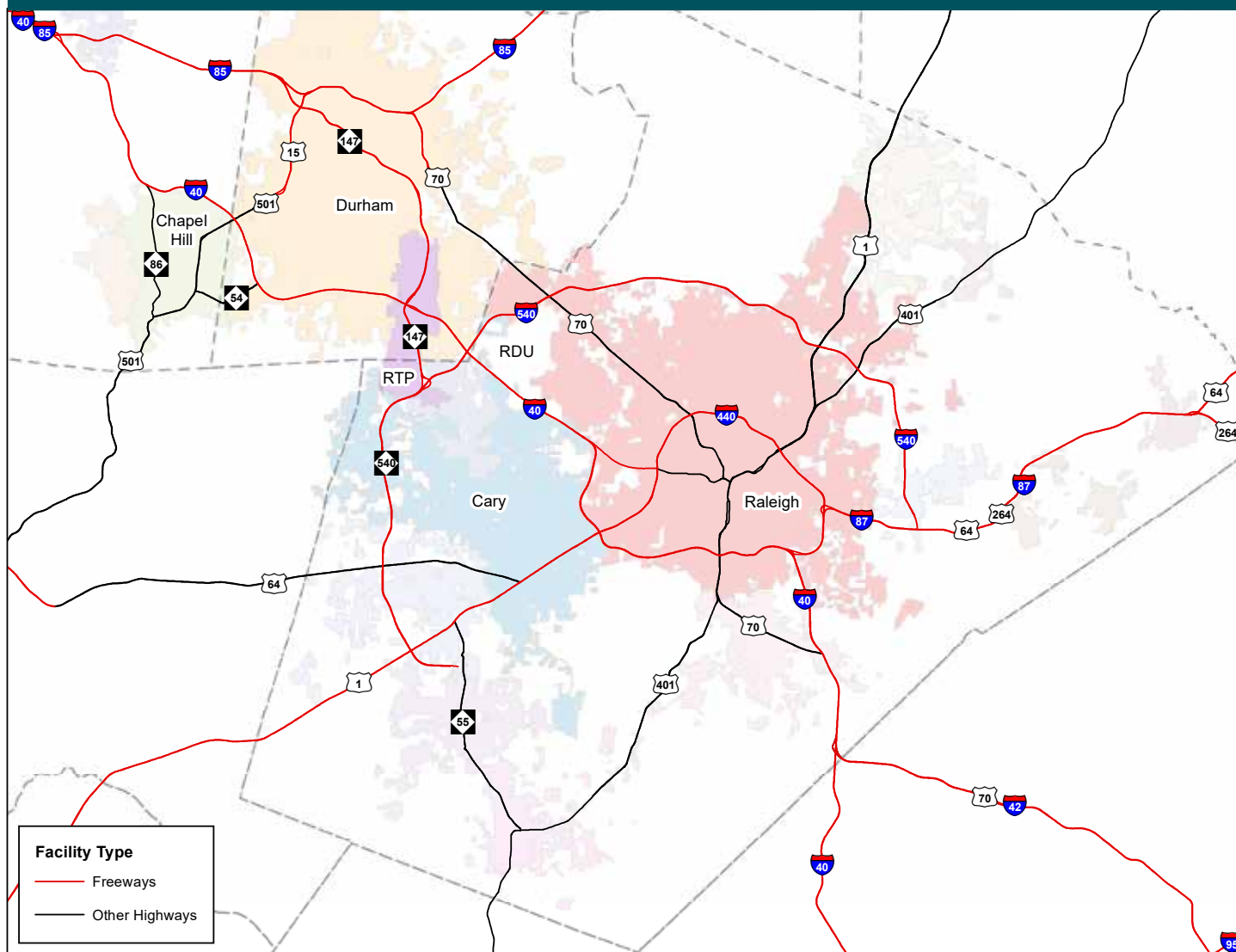
THE GROWING 540/TRIANGLE EXPRESSWAY SYSTEM IS THE **MOST ADVANCED TURNPIKE IN AMERICA** AND A USDOT-DESIGNATED AUTOMATED PROVING GROUND.

KEY PROJECTS

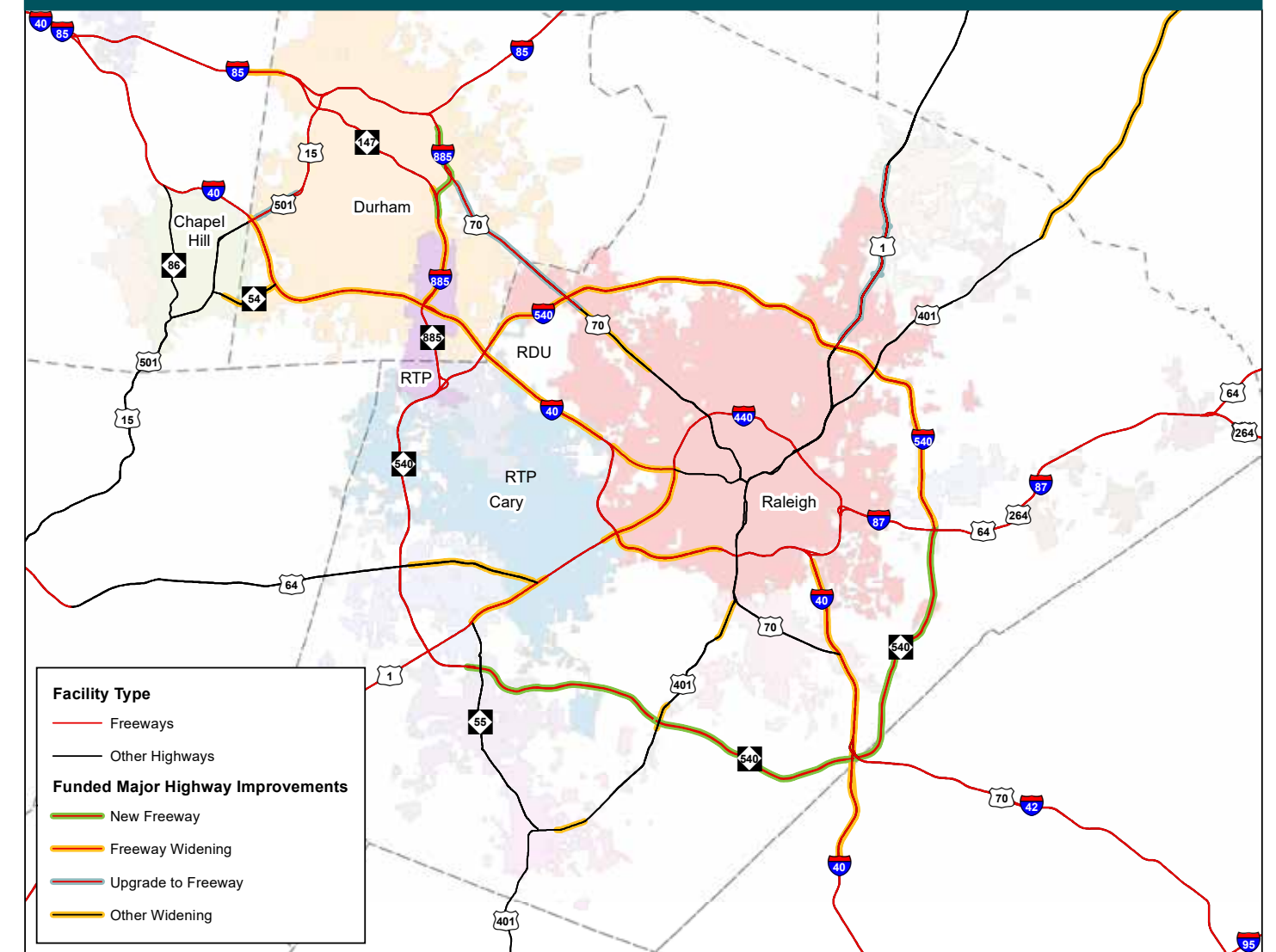
- Upgrade of US 1 north to freeway
- Upgrade of US 70 east of Durham to freeway
- Acceleration of 540 to I-40 and I-42 in southern Wake County

40+ MILES OF NEW FREEWAY OR UPGRADE TO FREEWAY ARE **FULLY FUNDED.**

Current Regional Road Network

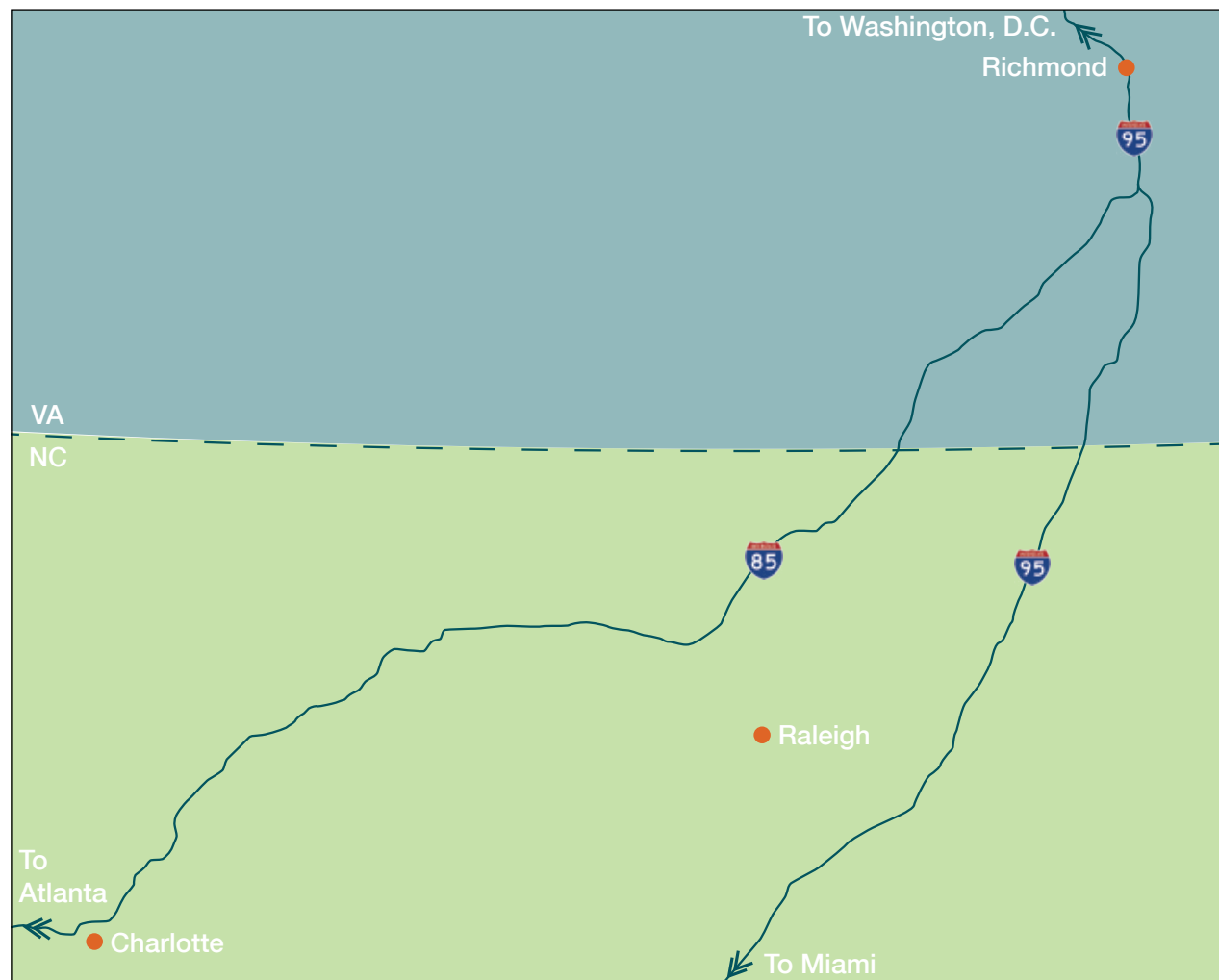


2027 Regional Road Network



WHAT'S LUCK GOT TO DO WITH IT?

This Triangle benefits from having both I-85 and I-95 in relatively close proximity to our region, without either of these primary north-south Interstates serving as a major commuting corridor for our market. This reduces congestion levels and buys us more time for improvements.



PRIMARY INTERSTATES IN TRIANGLE AREA

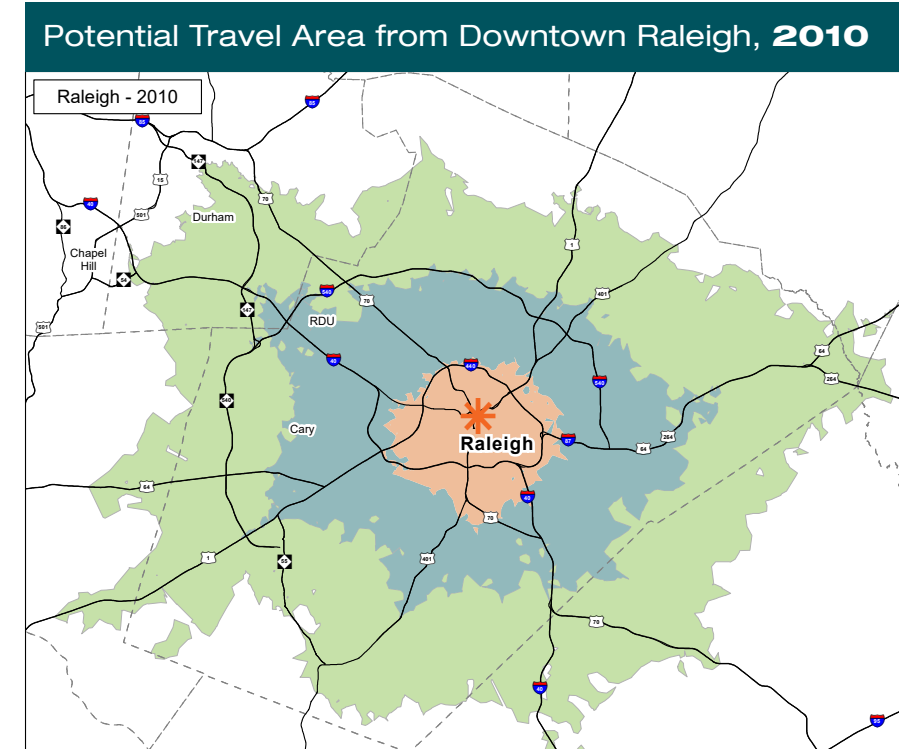
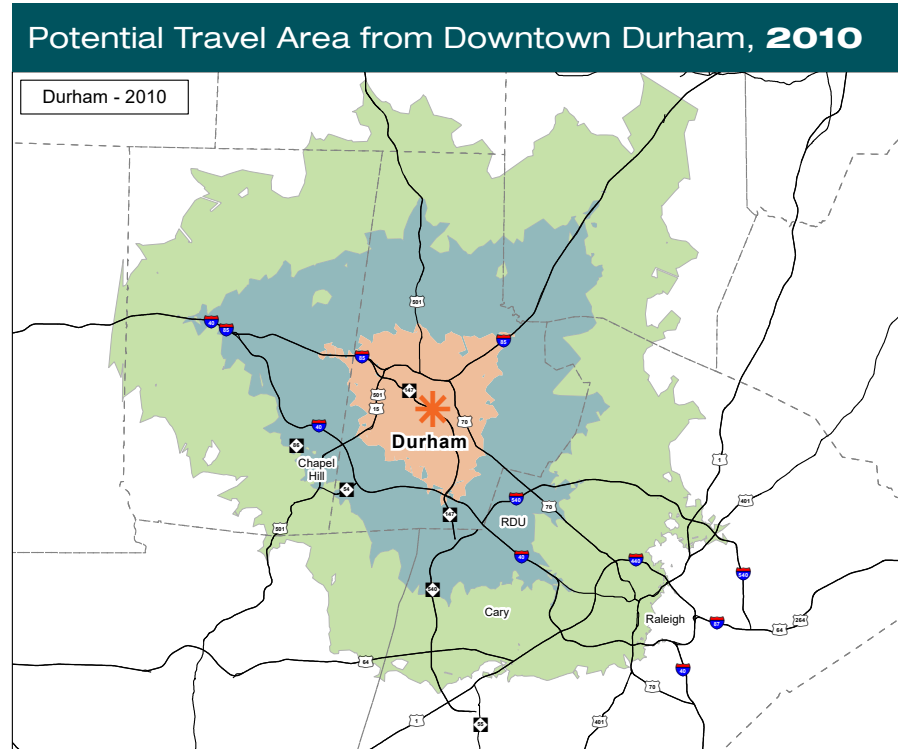
- I-40
- I-85
- I-95
- I-42
- I-87

THE TRIANGLE HAS **EASY ACCESS** TO I-85 AND I-95 — WITHOUT THEIR TRAFFIC IMPACTS ON OUR DAILY COMMUTES.



OUR BOOMING REGION IS SHOWING NO SIGNS OF SLOWING DOWN.

Whether one is starting from Downtown Durham or Downtown Raleigh, you can typically travel considerable distances during peak periods today in a given amount of time – and in the future as well, thanks to funded, sustained investments in regional transportation.



MAPS SHOW HOW FAR YOU CAN TRAVEL WITHIN:

10 MINUTES

20 MINUTES

30 MINUTES

DURING PEAK PERIODS

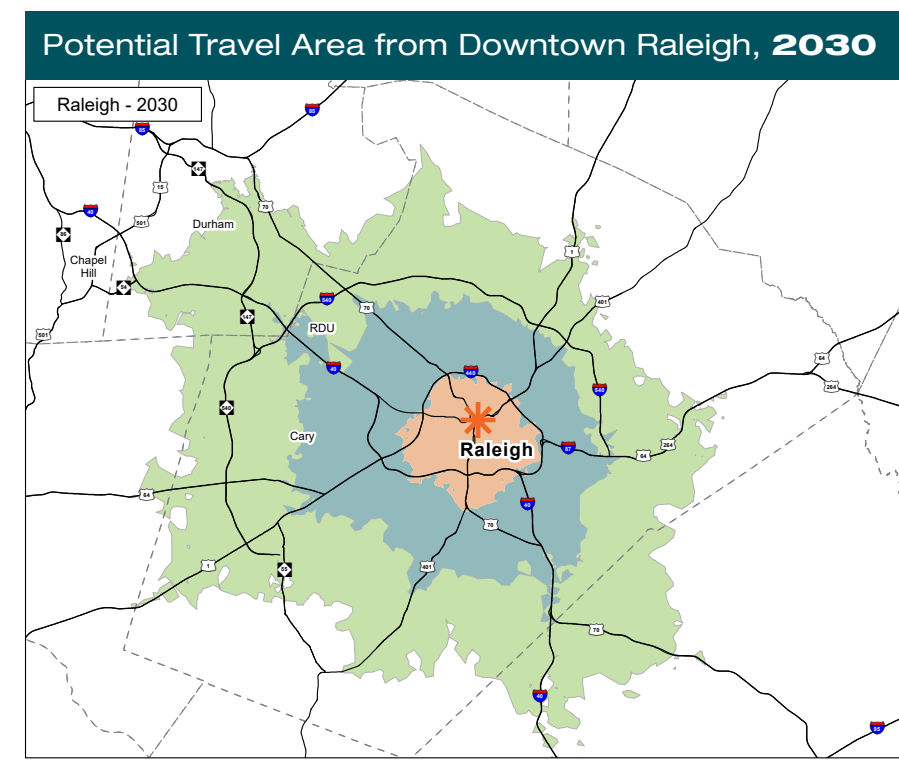
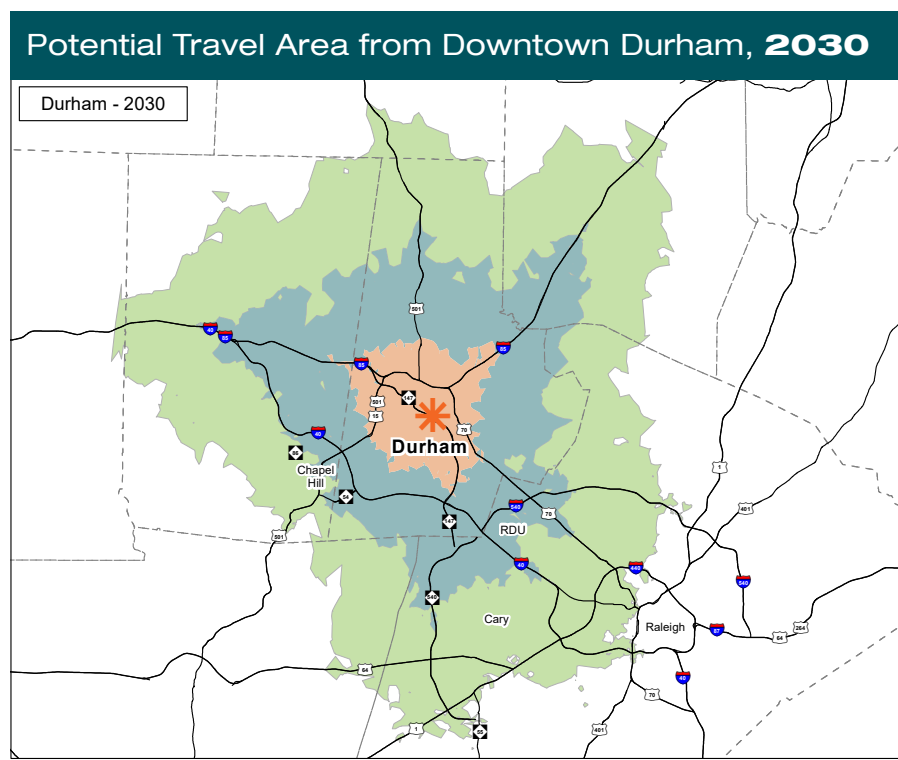
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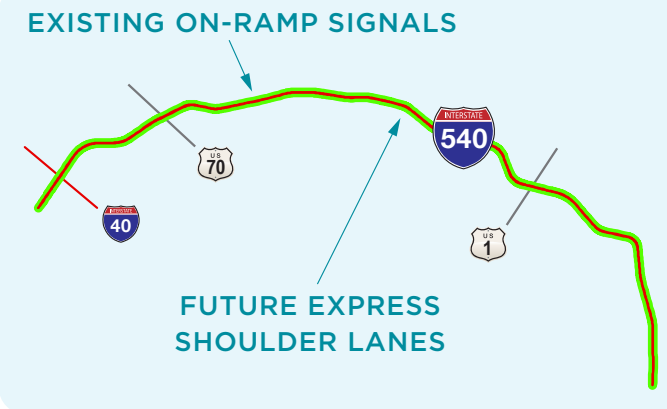
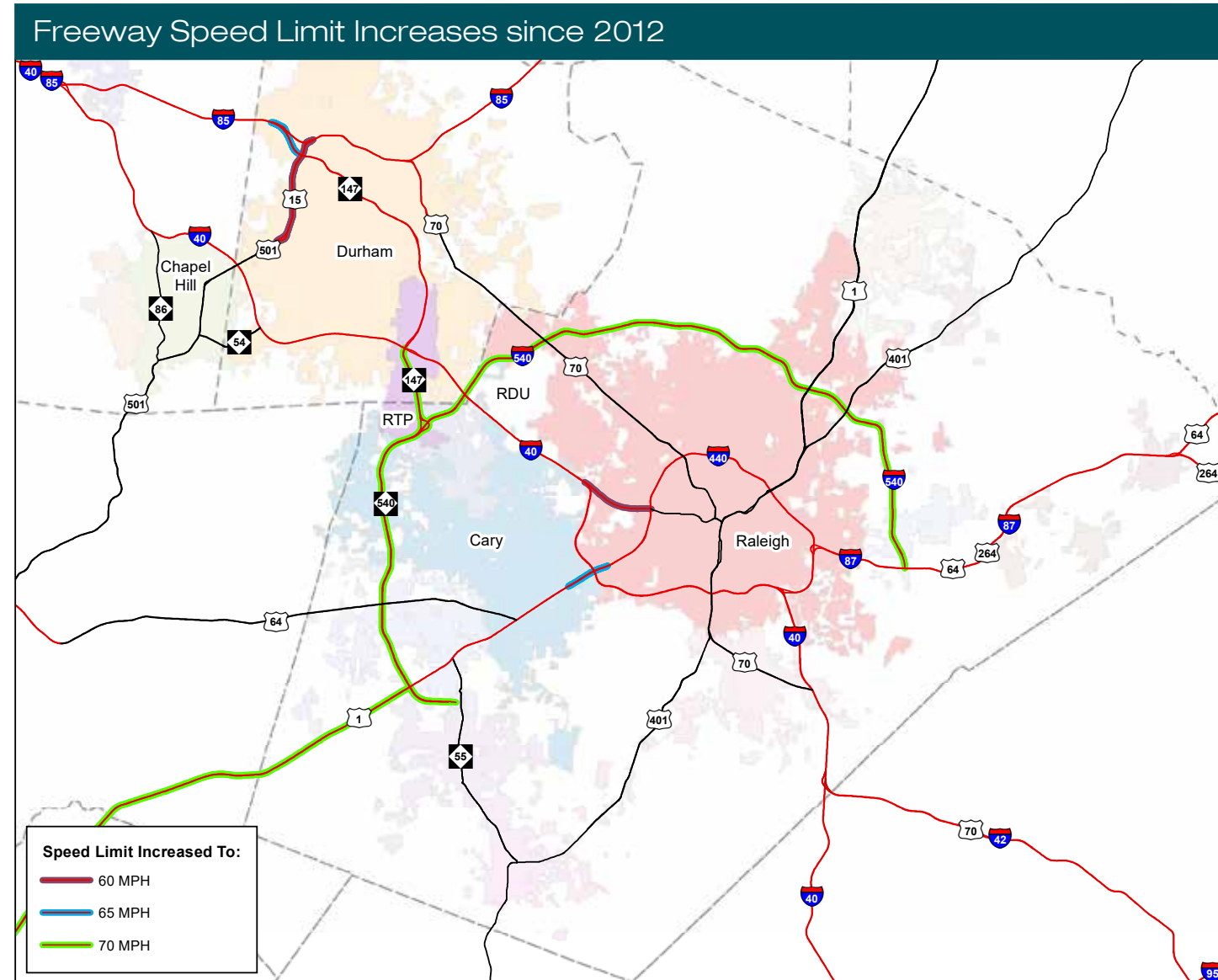


DESPITE OUR GROWTH RATE, WE EXPECT **LARGELY STABLE TRAVEL TIMES** THROUGH 2030.

MAKING THE BEST USE OF EVERY MILE – AND EVERY MINUTE.

Our region is developing the longest express shoulder managed lane in America along I-540. In addition, we have activated several on-ramp signals. As well, more than 70 miles of freeway speed limits have been increased in the last five years.

**70+ MILES OF
70 MPH SPEED
LIMITS ADDED
SINCE 2012.**



THE NEWLY-FUNDED EXPRESS SHOULDER LANE ON I-540 WILL BE **1/7 THE COST** OF A TYPICAL EXPRESS LANE.

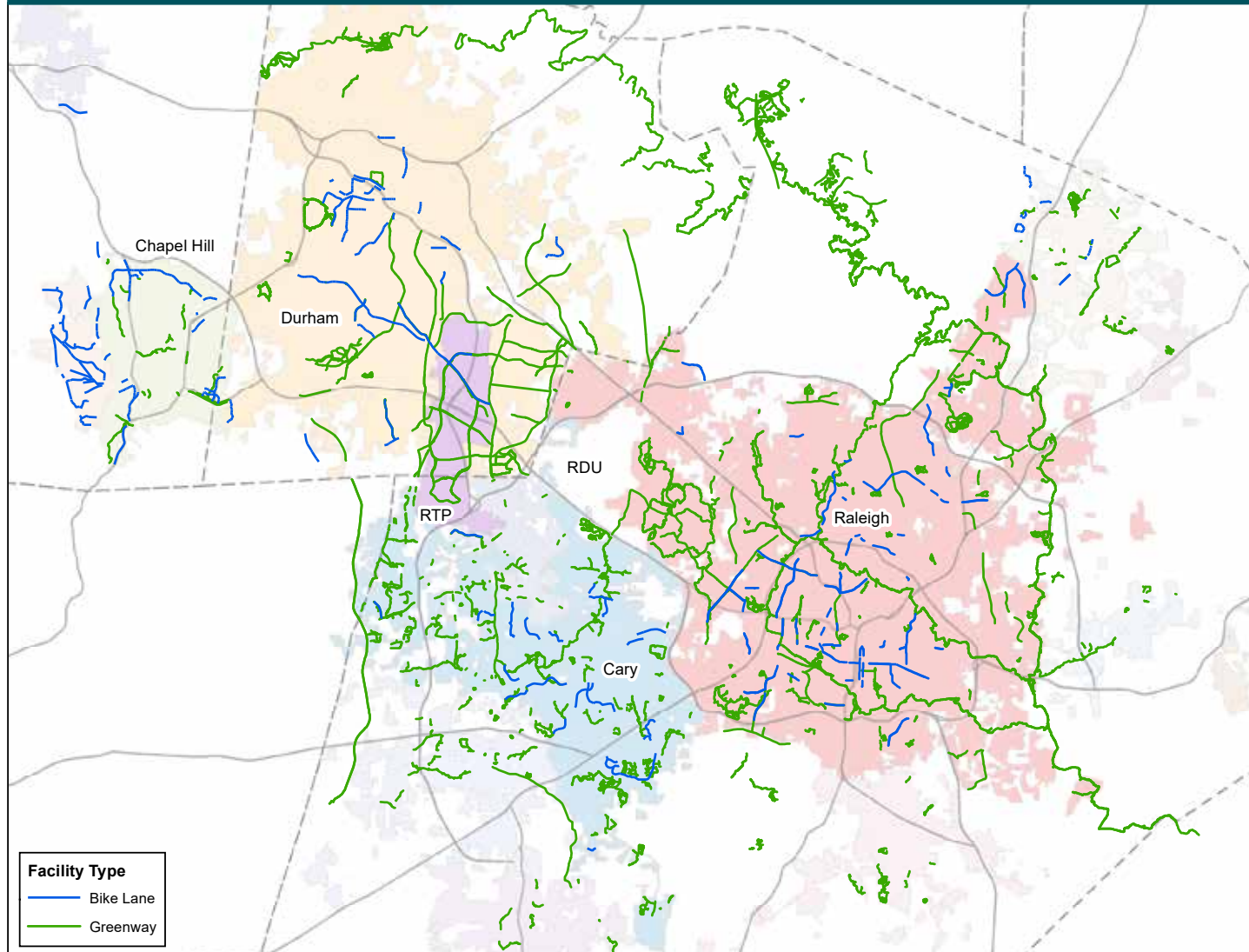


GREEN IS THE COLOR OF MOBILITY.

Our region has more than 300 miles of local and national greenways for commuting and recreation, in addition to a growing network of bicycle lanes. In fact, fully 97% of the Triangle's portion of the Maine-to-Florida East Coast Greenway will be off-road by 2019.

MORE THAN 11 MILLION MILES BIKED PER YEAR ON THE EAST COAST GREENWAY IN THE TRIANGLE.

Triangle Area Greenways and Bicycle Lanes

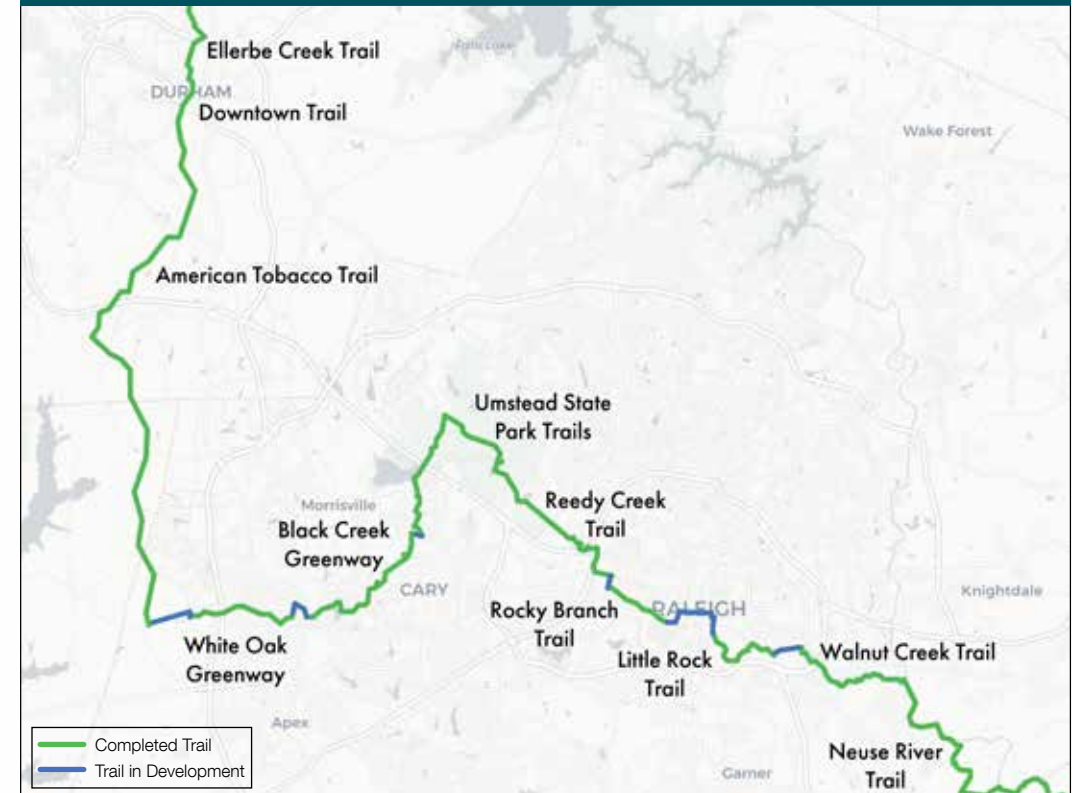


EAST COAST GREENWAY

THE TRIANGLE IS THE MOST **CONNECTED AND COMPLETED** METRO AREA ON THE EAST COAST GREENWAY.



East Coast Greenway map for the Triangle Region



Courtesy of East Coast Greenway, 2017

SHARE AND SHARE DIFFERENT.

The innovative Triangle market is the home to six different bicycle share programs — both dockless and with docking stations — in three area municipalities and three universities.



TRIANGLE AREA BICYCLE SHARE

- **Chapel Hill**
 - Gotcha Bike (UNC Chapel Hill)
- **Durham**
 - LimeBike
 - Ofo
 - Spin
 - Zagster (NC Central University)
- **Raleigh**
 - *Bewegen opening spring 2018*
 - LimeBike (NC State University)

6 BIKESHARE PROGRAMS

LAUNCHED REGIONWIDE,
DURING 2017-18.

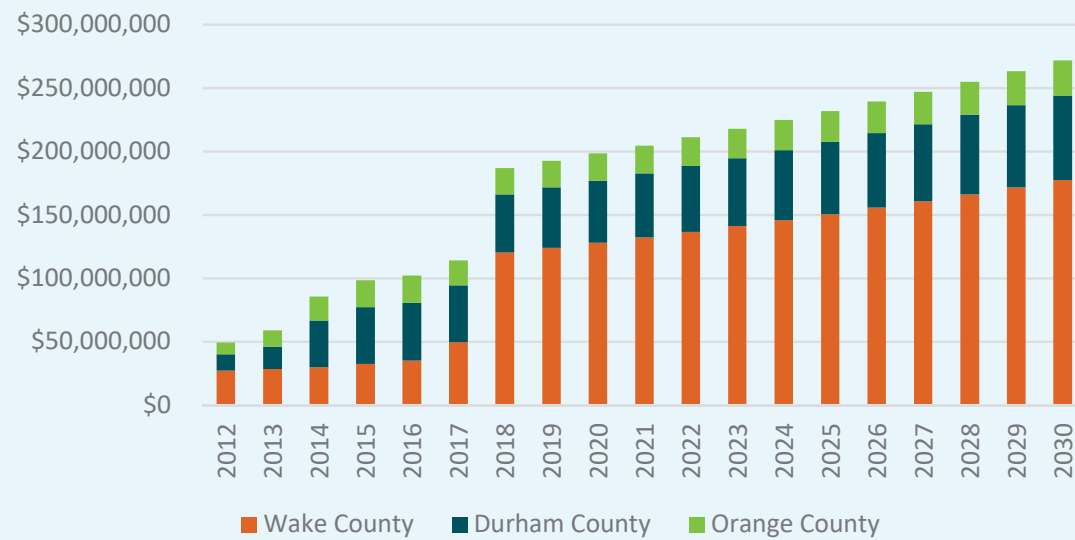


TRANSIT WILL CONNECT ALL THE DOTS.

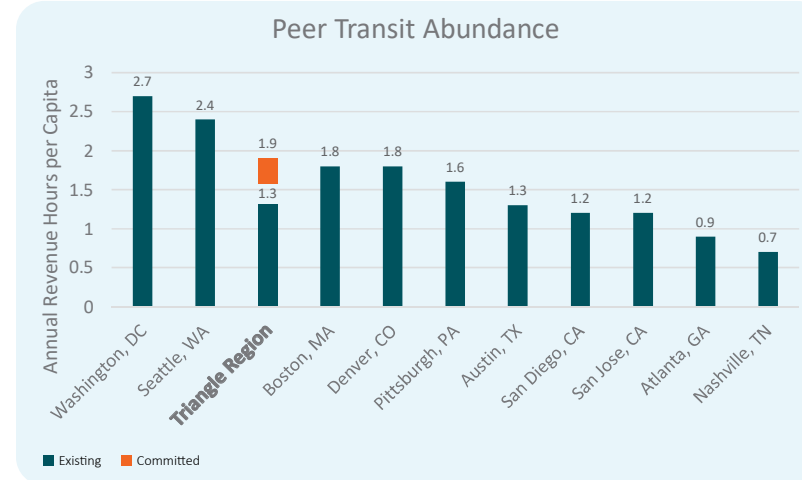
Our region's three core counties have all recently passed voter referenda to provide more than \$1 billion in locally-controlled funding via a ½-cent sales tax for new and enhanced transit. The result will be a **massive increase in transit service and infrastructure** by 2030 across our region. This will include more than 25 miles of bus rapid transit, more than 35 miles of commuter rail, and more than 15 miles of light rail.

\$1 BILLION IN NEW LOCAL FUNDS DEDICATED TO NEW TRANSIT SERVICE OVER THE NEXT 10 YEARS.

Local Revenues for Expanded Transit



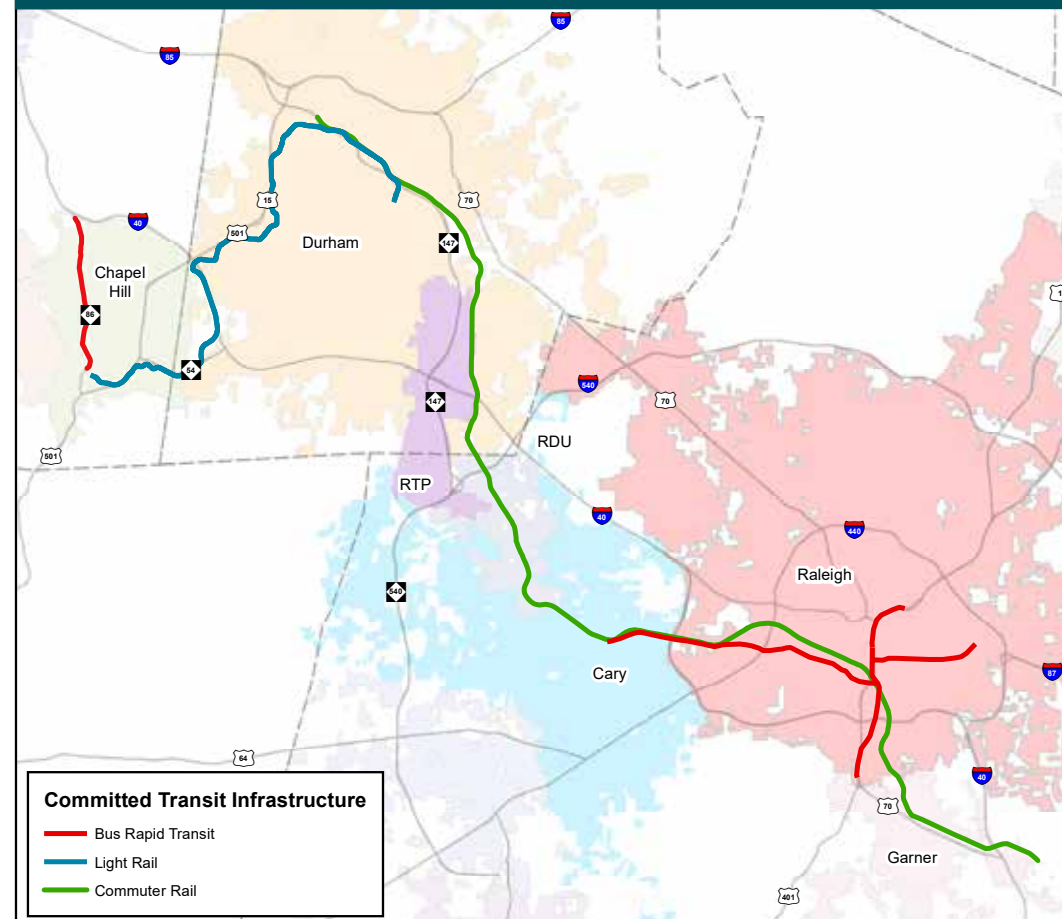
NOTE: Durham and Orange counties began collecting local sales tax in 2013; Wake County began in 2017
Sources: Wake County, GoTriangle



MORE THAN \$4 BILLION IN NEW TRANSIT INVESTMENT BY 2028.

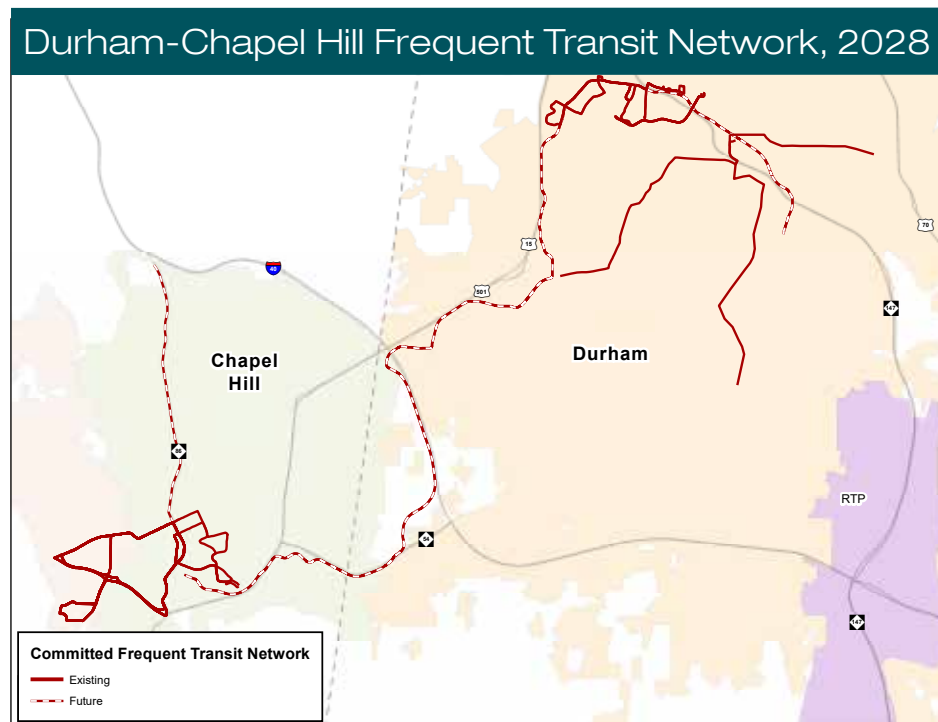
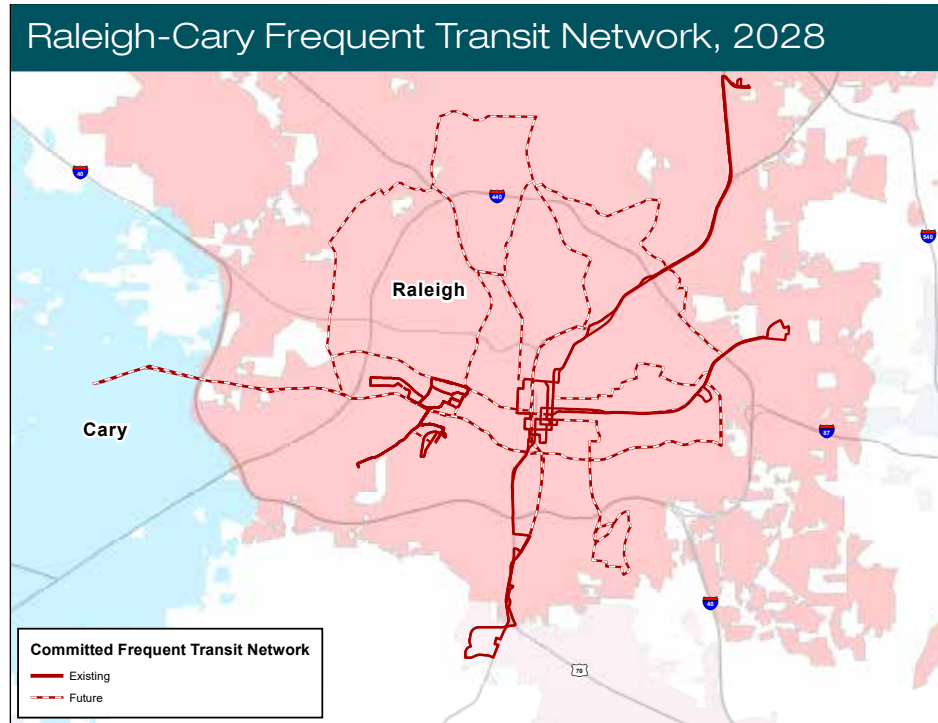
Sources: National Transit Database, Recommended Wake County Transit Plan

Triangle Area Transit Infrastructure, 2028



IT ONLY GETS BETTER FROM HERE.

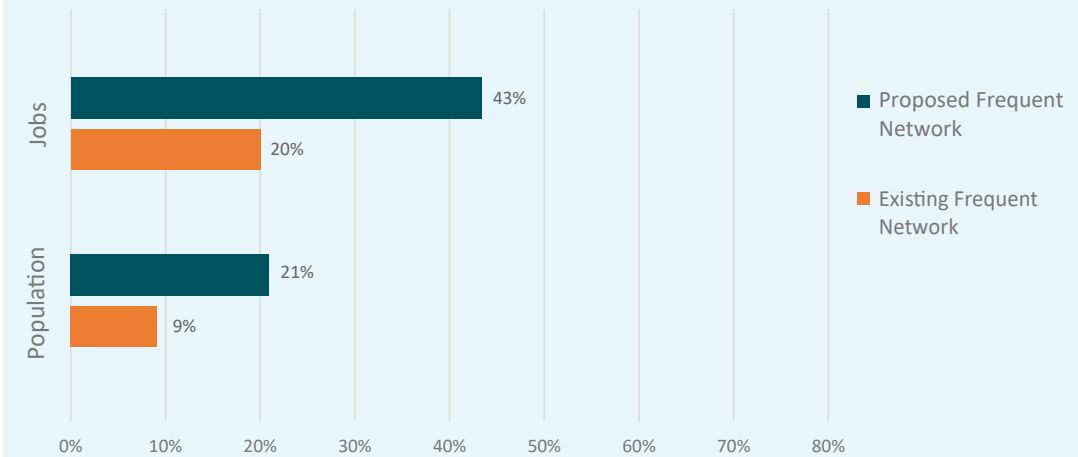
Our region is adding 70 miles of frequent transit service — every 15 minutes or better, all day — with an overall tripling of bus service within Wake County (Raleigh and Cary area) by 2027.



70 MILES OF 15 MINUTE FREQUENT SERVICE TO BE ADDED IN THE NEXT 10 YEARS.

BY 2027, THE PERCENTAGE OF JOBS AND POPULATION WITHIN 3/4-MILE OF FREQUENT TRANSIT SERVICE WILL **MORE THAN DOUBLE** IN WAKE COUNTY.

Wake County Population and Jobs Within 3/4 Mile of Frequent Service

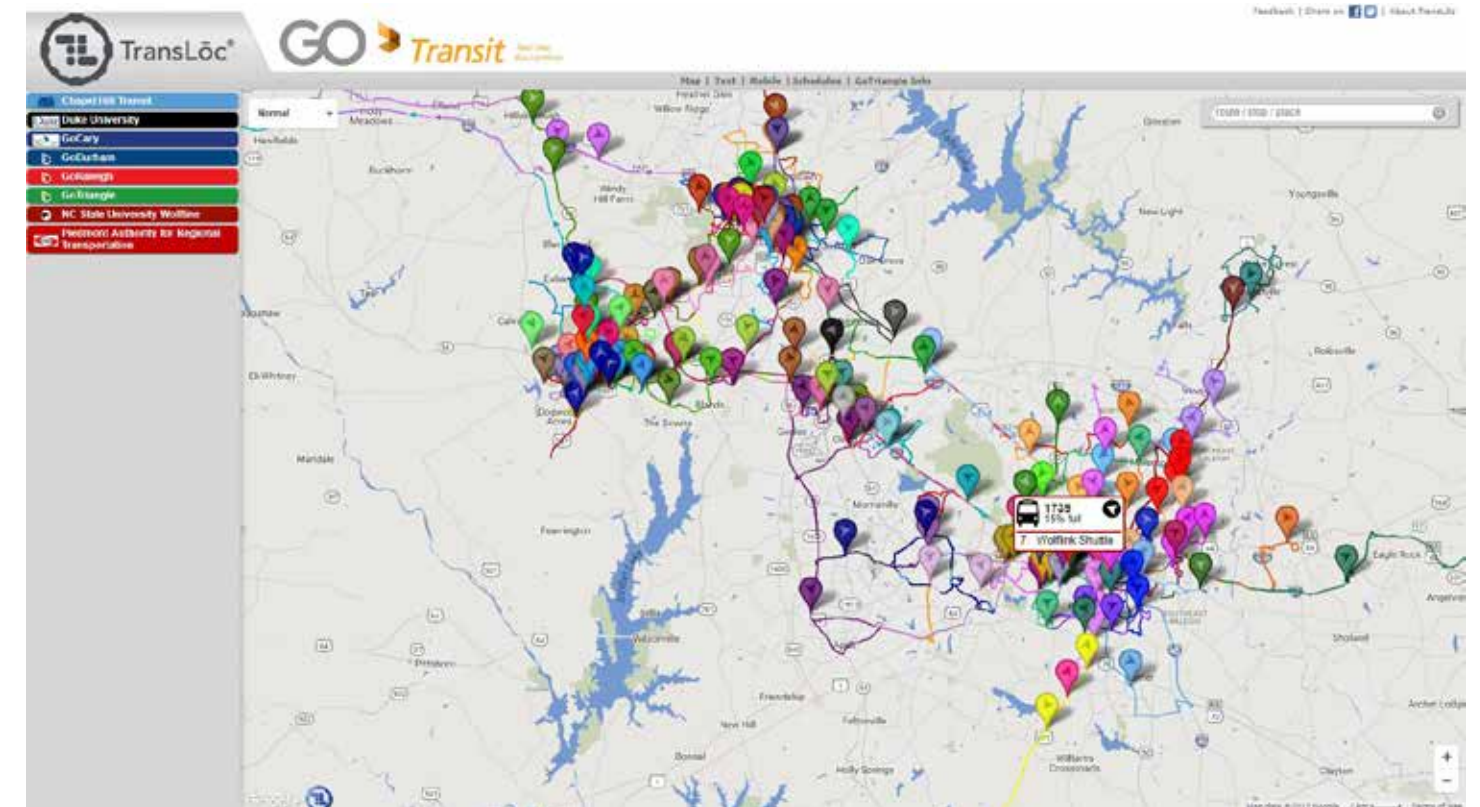


LEVERAGING BOTH LOW AND HIGH-TECH TRANSIT.

We have one of the largest bus on shoulder systems (BOSS) in America to keep regional buses moving by using existing freeway shoulders when congestion occurs. In addition, every bus in our region is trackable via a real time mobile phone app, with 2018 bringing on-demand shuttles for all of Research Triangle Park.

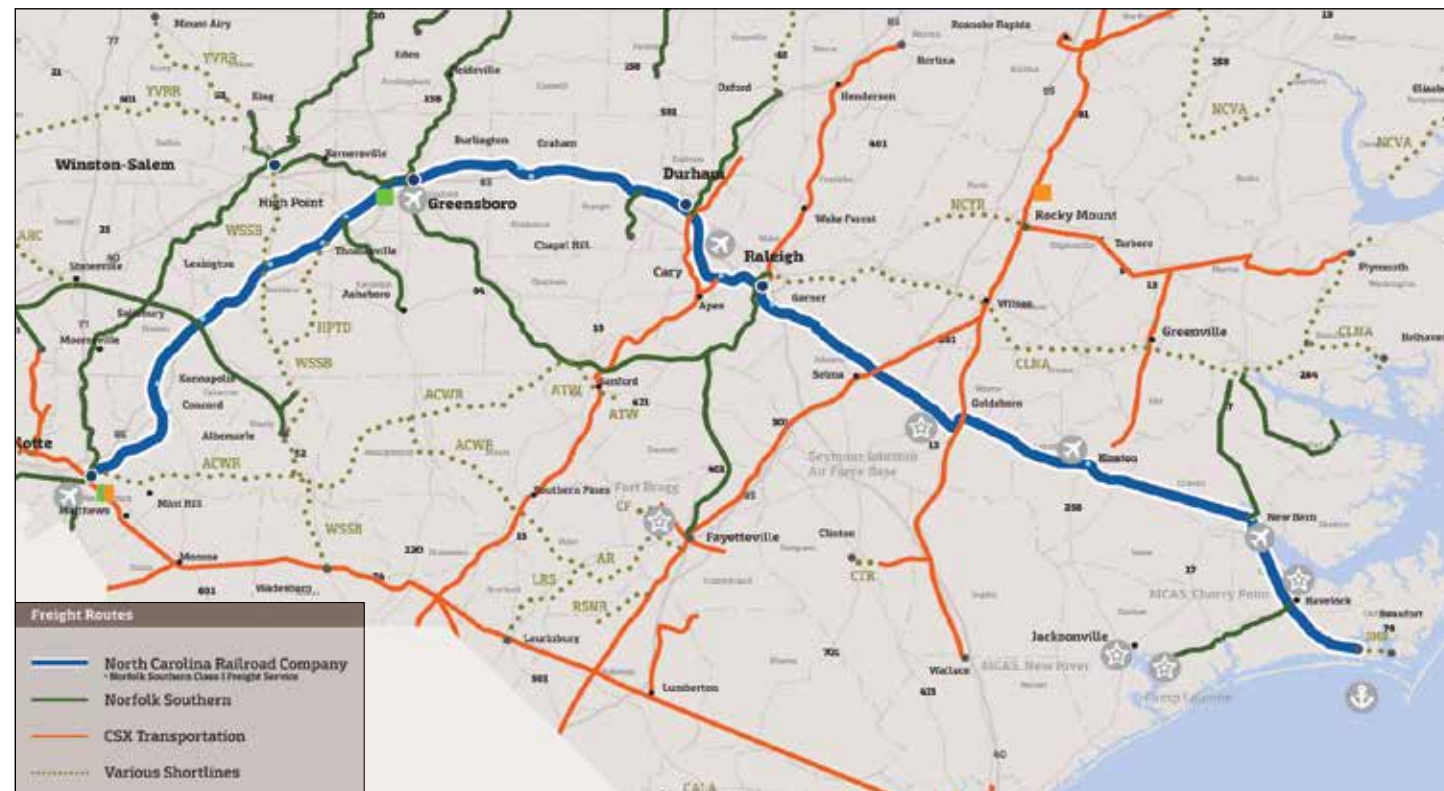
MORE THAN
40 SHOULDER-MILES
OF ACTIVE BUS ON SHOULDER
SYSTEM TODAY.

THE FIRST REGION IN THE
U.S. WITH **REAL-TIME**
BUS TRACKING
ACROSS THE ENTIRE SYSTEM.



LEVERAGING MORE THAN 150 YEARS OF FORESIGHT.

The North Carolina Railroad Company is a private company with one hundred percent of the stock owned by the state of North Carolina. The 300+ mile railroad corridor that runs from Charlotte through the Triangle, to the coastal port of Morehead City, provides economically vital freight and commerce linkages for the Triangle as well as expanded intercity rail service, including potential higher speed trains and future commuter rail.



Courtesy of the North Carolina Railroad Company, 2017

RALEIGH-CARY-DURHAM-GREENSBORO-CHARLOTTE PASSENGER RAIL SERVICE

- 6 trains per day Today (3 each way)
- 8 trains per day in 2018 (4 each way)
- 10 trains per day in 2019 (5 each way)

THE PRIVATELY OWNED NORTH CAROLINA RAILROAD CORRIDOR IS A 300+ MILE **COMPETITIVE ADVANTAGE** FOR OUR REGION AND STATE.

New Raleigh Union Station – Opening Early 2018

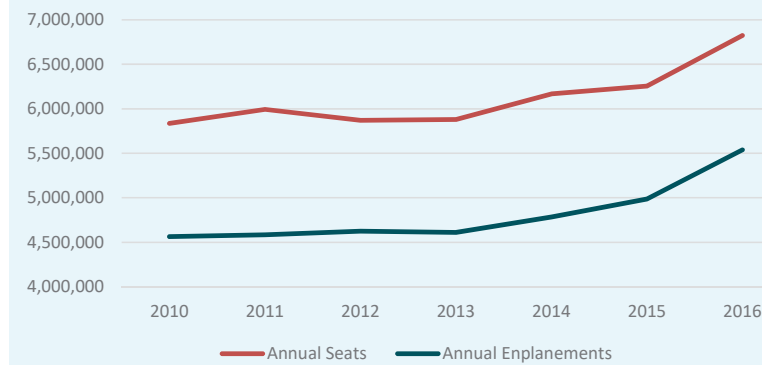


YOU CAN GET THERE FROM HERE.

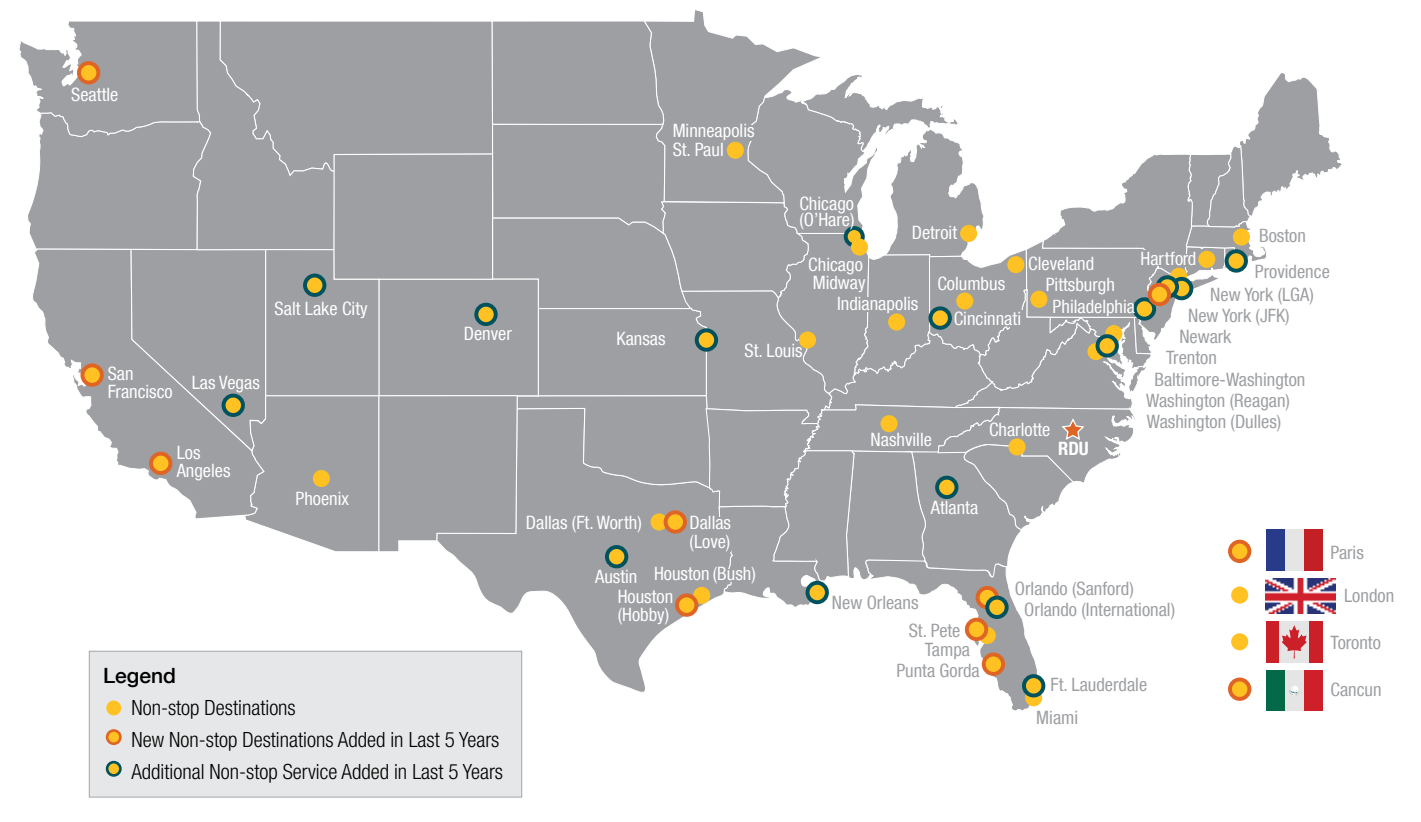
We became the first non-hub region with two daily nonstop transatlantic flights in 2016, with Delta service to Paris complementing American service to London. In 2017 Raleigh-Durham International (RDU) was named the most connected mid-sized Airport in the U.S., with nearly 50 nonstop destinations available. RDU has a healthy mix of carriers that helps keep airfares competitive today.

RDU INTERNATIONAL IS THE **MOST CONNECTED** MID-SIZED AIRPORT IN THE U.S.

Sustained Steady Growth at RDU



Expansion of Non-Stop Service from RDU Airport Since 2012



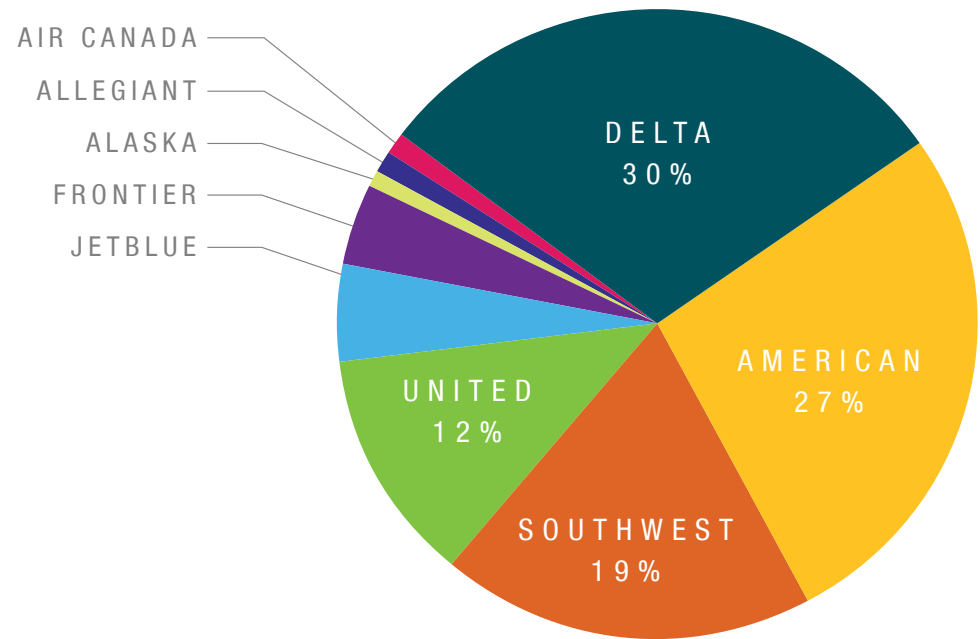
NOW **11 MILLION** ANNUAL PASSENGERS AT RDU.

TAKING OUR REGION TO NEW HEIGHTS – WITHOUT THE HIGH COSTS.

Raleigh-Durham International (RDU) has a healthy mix of carriers that keeps airfares competitive today. In addition, RDU has a strong Vision 2040 business plan to replace and lengthen our primary runway to 11,500 feet to provide increased safety and operational flexibility. RDU will also expand the number of terminal gates, enhance parking offerings, and create a new, more convenient car rental facility.

THE N.C. STATE LEGISLATURE IN 2017 APPROVED
A RECURRING INVESTMENT OF MORE THAN
\$30 MILLION PER YEAR IN RDU.

Diversified Mix of Air Carriers at RDU Airport



BRINGING IT ALL TOGETHER.

The Triangle area has benefited tremendously from the sustained, cooperative approach of our market's elected leaders, transportation officials, and private sector.

The Regional Transportation Alliance (RTA) — the voice of the regional business community on transportation — has been a powerful, collaborative partner for more than 15 years. We are committed to ensuring the continued strengthening of our region's mobility assets as we grow.



For more information:
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Regional Transportation Alliance

The voice of the regional business community on transportation

www.letsgetmoving.org