

Getting There

A Travel Markets Analysis of the Triangle's Passenger Rail Corridor Executive Summary



The Triangle Region is considering a passenger rail investment that initially could connect West Durham, Central Durham, East Durham, the Research Triangle Park, Morrisville, Cary, NC State University, West Raleigh, Central Raleigh, Southeast Raleigh, Garner and Clayton in Johnston County. Later investments might extend service to Orange County on the west and farther into Johnston County on the east. Part of this effort is analyzing opportunities along the corridor: for affordable housing, for guiding land use, for serving travel markets and for influencing economic development.

This Executive Summary highlights findings from an analysis of rail corridor travel markets. The full report:

- Defines travel markets and looks at them at both the regional scale and the rail corridor scale.
- Examines travel to or from the corridor, and especially trips that both begin and end in the corridor.
- Focuses on two critically important elements of travel markets:
 - Key job hubs within the region and along the rail corridor
 - Existing neighborhoods viewed through an equity lens – places with relatively high levels and concentrations of households with lower incomes, households that lack vehicles, and households with Black, Indigenous & People of Color (BIPOC) residents
- Looks at both total jobs and jobs with low or moderate earnings.
- Indicates performance measures we can track and steps we can take to work together in the Triangle Region to best serve our most important travel markets.

Understanding how a commuter rail investment serves existing travel markets in the region, and how those markets might change over time, is an important foundation for determining appropriate types and amounts of service to provide and the best number and locations of stations.

This travel market analysis focused on two types of places:

- The “rail corridor,” defined as one mile on either side of the railroad tracks, and
- “Station study areas,” circles with a half-mile radius that represents likely locations for rail stops

The Context

A travel market is just like any other market: it is where an exchange can take place – where supply and demand can meet. Successful transit investments **supply** services that address the things that influence **demand**: it goes where users want, when they want, in ways that are good uses of their time and money, are fast and reliable, give them freedom to change their plans, and respect their safety and comfort.

Rail Corridor Jobs

The four counties in the study region – Johnston, Wake, Durham and Orange were home to 930,000 jobs, pre-COVID. The rail corridor is 4% of the region’s area, but contains 280,000 jobs: 30% of the total. Importantly, about 56,000 workers both live and have their primary job in block groups completely or partly in the corridor, the main market for rail service. Looking only at primary jobs with low and moderate earnings - less than \$40,000 per year – 23% of these jobs in the 4-county region are located in the rail corridor. With major education and training, medical, and entertainment facilities, corridor travel markets are more than just commute trips.

Key Job Hubs

Eight of the region’s top 10 job hubs lie along the rail corridor, including the city centers of Raleigh and Durham, NC State and Duke Universities, and several census block groups in and around the RTP. Most of the key hubs for total jobs are also the top hubs for primary jobs with low and moderate earnings – of the top 10 for total jobs, only two hubs associated with the RTP and one at WakeMed are not also in the top 10 for low and moderate earnings jobs.

Cross-County Travel

Regional transit connections may be especially important in the Triangle. 45% of the workers who live in Wake, Durham, Orange and Johnston Counties are employed by firms outside of the county where they live. The Wake-Durham County flow is especially prominent, with over 96,000 workers living in one county and employed by firms, agencies or institutions in the other.

REINVEST Neighborhoods

REINVEST Neighborhoods are places with the most significant presence of BIPOC residents, lower income households, households without vehicles and legally-binding, affordability restricted (LBAR) housing. The letters in RE-IN-VE-ST represent these four important characteristics: **RE** (race/ethnicity), **IN** (income), **VE** (vehicle availability) and **ST** (status of affordable housing). About 100 of the region’s 767 block groups score high on three or more of the REINVEST metrics. Taken together, all of the REINVEST neighborhoods, shown in yellow and purple on the map, have about twice the percentage of BIPOC residents, twice the proportion of people living below the poverty line, three times the percentage of households without vehicles and four times the percentage of LBAR housing units as the region as a whole. The full report goes into detail on the location and characteristics of these important neighborhoods; many of them are located within or adjacent to the rail corridor, especially near central and southeast Durham, central and southeast Raleigh, and Garner. Almost 70,000 people live in REINVEST Neighborhoods that are completely or partly in the rail corridor.

The Future Travel Market

The analysis focused on work-oriented travel during pre-COVID conditions. Although the future is always uncertain, two things seem likely: i) traditional office work may become more of a “hybrid” model – with people working part of the time in a traditional work environment and part of the time from home or other remote locations; and ii) the region will continue to be fast-growing, with the spine of the region along the rail corridor a magnet for growth. Remote work is less of an option for many lower earning jobs, including many deemed “essential workers” during COVID.

Critical Considerations and Next Steps

There can be a tension between service that is best for the travel markets and the ease of railroad operations, especially where tracks are shared among freight, inter-city passenger and intra-regional passenger rail. Mutually beneficial investments may require systematic, sustained partnerships involving people of good will dedicated to creatively solving problems as they arise. A critical part of collaboration will be ensuring seamless “first mile-last mile” bus and micro-mobility connections that link neighborhoods and business districts to rail stops – every rail trip begins and ends with someone walking from and to a building.

The Symbols on This Map

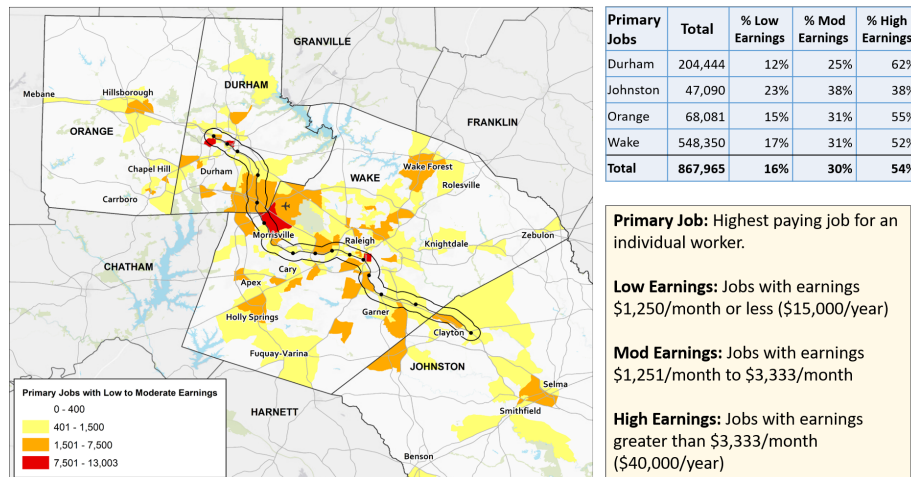
- The railroad corridor: 1 mile on each side of the tracks where service is planned
- Initial Station Study Areas: ½ mile radius circles around stops being analyzed
- Places that measure as key job hubs
- Places that measure as REINVEST neighborhoods
- Places that measure as both key job hubs and REINVEST neighborhoods

The Travel Market Opportunity Analysis was conducted by Jenna Kolling of the Triangle J Council of Governments and is the second of three evaluations accompanying the commuter rail service analysis of the NC Railroad Corridor between West Durham and Clayton. The other two evaluations address affordable housing and land use.

How to Learn More and Engage in the Project

This Executive Summary includes highlights from a more detailed travel market analysis of the proposed commuter rail service between West Durham and Clayton in Johnston County. Each of the topics addressed in the highlights on the previous page is described in more detail in the full report. The report, along with resources like those shown below in thumbnail images, and opportunities to give your thoughts about the project, are available at [ReadyForRailNC.com](https://www.readyforrailnc.com)

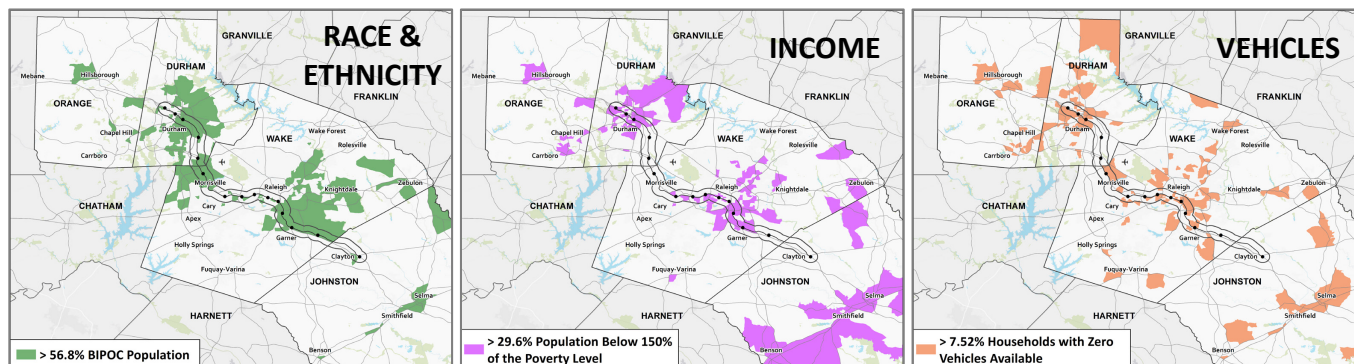
Key Job Hubs



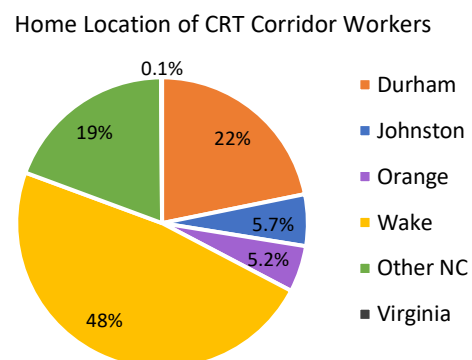
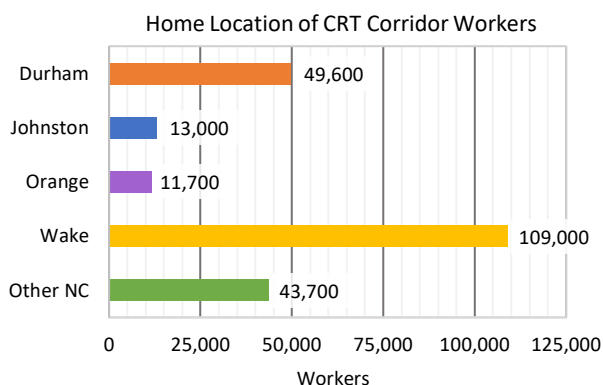
A Word About the Data

The main geographic unit of data analysis is the Census Block Group – the smallest unit for which the Census Bureau provides detailed information on demographic characteristics. There are 767 block groups in the four county-region. The Census Bureau updates its data each year, enabling the analysis to be revised annually to reflect changing conditions.

REINVEST Neighborhoods



Connecting Jobs and Workers in the Rail Corridor



This report was prepared by the Triangle J Council of Governments as part of its work to align transportation investments with land use and housing affordability decisions. Contact Jenna Kolling at jkolling@tjcoq.org with comments and questions.