Looking Ahead

A Context for the Next Twenty Year Needs Assessment

July 2013
A Larger Context for Twenty Year Needs

- Growing transit demand and complexity of travel paths and times
- Growing economy changing type, location of jobs
- A new generation that embraces transit but expects a “21st Century” system
- Strategic Investments beyond the Core Program needed to sustain ridership growth and regional economy
Travel Demand is Changing

• Daily transit ridership up 58% since 1992
  – Subway and commuter up, bus flattening
• Peak period transit travel to the CBD is flattening
  – Expansion of non-peak (mid-day, nights, weekends) work travel
  – More trips within Outer Boroughs
  – Growing non-work trips
• Auto use trending down
• Emerging residential (Bushwick, Williamsburg) and business districts (LI City, White Plains, Downtown Brooklyn)
• Changes driven by emerging “24/7/365” economy
Significant MTA Ridership Growth Over 20 Years

Average Weekday Paid Rides

<table>
<thead>
<tr>
<th>Year</th>
<th>Millions</th>
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<tbody>
<tr>
<td>1992</td>
<td>5.39m</td>
</tr>
<tr>
<td>2002</td>
<td>7.71m</td>
</tr>
<tr>
<td>2012</td>
<td>8.52m</td>
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Source: MTA Annual Reports; excludes MTA B&T Crossings
Peak Hour Transit Use to CBD is Flattening

*Subway Arrivals*

*Source: NYMTC Hub-Bound data*
“Commutation” Ticket Sales Trending Down, While “Non-Commutation” Tickets Sales Growing

Source: MNR and LIRR 2012 Reports
Potential Growth in Work Trips to Manhattan
2010 and 2035 Increment, All Modes, by Residence of Workers

NYC Residents

- Manhattan
  - 2010: 635
  - 2035: 133
  - Increment: 178

- Outer Boro
  - 2010: 892
  - 2035: 178
  - Increment: 178

Suburban Residents

- Long Island
  - 2010: 130
  - 2035: 16
  - Increment: 14

- Mid-Hudson
  - 2010: 107
  - 2035: 28
  - Increment: 79

- Connecticut
  - 2010: 27
  - 2035: 9
  - Increment: 18

- New Jersey
  - 2010: 248
  - 2035: 59
  - Increment: 189

Source: 2010-2035 MTA forecasts
Destinations of Outer Borough Workers

All Modes

Source: Census JTW Data, selected years, all modes
Annual Crossings for MTA Bridges & Tunnels
Trending Down Since 2007

Recessions: 1990-91, 2001, 2008-09

Source: MTA B&T data
Nationwide Auto Usage is Dropping

[Graph showing estimated vehicle miles driven on all roads with notes: Data Through December 2011, 55 months total, 21 months to 5.0% trough, Jan 1971, Apr 1999, Jun 2005, Latest down 6.27% from peak, Nov 2011 77 months since peak, 6.30% trough, Population adjusted using the BEA Mid-month population estimates [FRED POPTHM], Chained to the Jan 1971 population]
Key Factors Affecting Regional Travel Changes

• Population continues to grow and change
  – Impact of “Boomers” and “Millennials”

• Economy in transition: “9 to 5” becoming “24/7/365”
  – Dominance of tech, education, health care sectors
  – Growth of tourism and hospitality
  – Fewer traditional “9 to 5” jobs in FIRE, management, administrative support.

• Emergence of non-traditional work patterns
  – No longer limited to peak hours and Manhattan CBD
  – Increase in part-time, self-employment, telecommuting-work
  – Emergence of new regional business “hubs”
  – Suburban employment growth needing more labor

• Is a “New Normal” being established?
Continued Population Growth in the Region

Source: Census data and MTA forecasts
Millennials and Boomers Changing the Region

The Millennials (born after 1980)
- About 22% of regional population
- Entering the labor force
- Desire to live in urban settings
- Did not experience ‘70s decay
- Less interest or financial ability in owning a car
- A tech-savvy “24 hour” lifestyle

The Boomers (born 1946-1964)
- 26% of regional population
- Leaving the labor force
- Opting to “retire in place”
- Have the financial resources to relocate to urban areas for mobility/lifestyle
- Growing transit dependence
- More off-peak travel
Continued Employment Growth in the Region

Source: Census data and MTA forecasts
Growth in Industries Less Tied to the “9 To 5”
Changes in County Employment by Industry 2000-2011

Source: US Census County Business Patterns
Is a “New Normal” Emerging?

- Changing demographics and employment
- Growing transit use; peak hour travel flattening
- New “24/7/365” travel patterns spreading ridership to hours where capacity exists
- Transit travel to suburbs and among outer boroughs growing where capacity exists
Moving Ahead

- Prevent capacity and reliability backslide, maintain SOGR/NR
- Complete projects addressing longstanding problems
  - Build full-length Second Avenue Subway
- Possible strategies to address current trends and support future growth:
  - Overcome subway capacity obstacles
  - Optimize the transit, commuter rail, and bus network
  - Create a “21st Century” transit system
  - Develop a “resilient” MTA network
Complete Full-Length 2nd Ave Subway
Addresses Longstanding Problems and Continued Growth

- Crowding on the “Lex” 4 5 6
- Access to transit on East side to support population and economic growth

- **Phase 2**: 96th Street-125th Street
- **Phase 3**: 72nd Street-Houston St
- **Phase 4**: Houston Street-Hanover Sq.

- 8.5 Route miles
- 16 new stations
- 1 renovated station
- 2 services
- Transfers to other subway lines

MTA
Overcome Subway Capacity Obstacles

• Develop network improvements to address future congestion points, e.g.:
  – CBTC expansion
  – Nostrand Junction
  – Corridor capacity studies

• New entrances to address access at key stations

2035 Capacity Needs assuming committed network: ESA, full length SAS and 7-Line
Optimize the Subway and Bus Network

- Additional SBS service for intra-borough/non-CBD travel with City commitment to street improvements
- Additional subway transfer points
- Possible use of abandoned / under-utilized ROW for new non-CBD transit?
Optimize the Rail Network and Build New Markets

- LIRR Ronkonkoma 2nd track
- Encourage infill development near stations and commercial hubs
- LIRR branch service opportunities
- MNR Penn Station Access
- West of Hudson capacity
- Penn Station long range capacity
Build a “21st Century” Transit System

• Advance technological innovations expected by a new generation of customers
  – Real-time information and displays in stations and on vehicles
  – System-wide electronic fare and toll payment
  – Accessible phone/WiFi service
• Evaluate car/bus design approaches
  – “Open” train sets (maximizes floor space)
  – Wider, more numerous bus doors (speeds loading)
• Respond to flattening of peak and increasing off-peak travel demands
  – Track maintenance windows
  – Fleet requirements
• CBTC to expand capacity and reliability
Build and Operate a Resilient MTA

- A resilient transportation network is critical to the region’s economic outlook
- Continued collaboration with regional, state, and federal partners
- Rebuild and strengthen critical infrastructure against future storms to improve resiliency of network
- Develop enhanced design guidelines that support resilient infrastructure
Next Steps

• Continue outreach to stakeholders
• September 2013 briefing on core capital needs to CPOC
• Publish Twenty Year Needs document
• Launch development of 2015-2019 Plan
• Present 2015-2019 Plan