

Topics

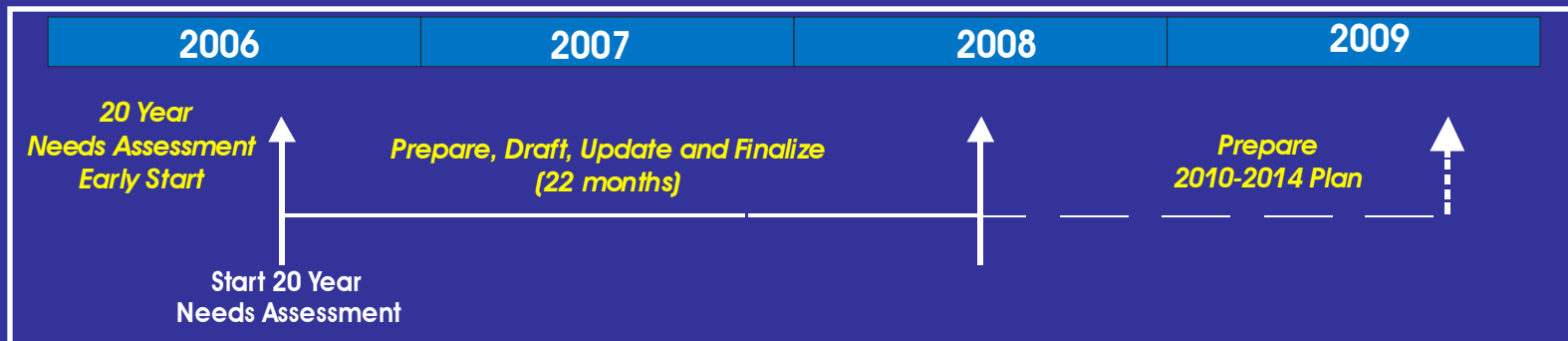
- **MTA's Regional Strategic Review**
- **How is the region changing?**
- **Where is the region heading?**
- **How are NYC and the Suburban Counties Planning for this Growth?**
- **Possible Implications for MTA Network**
- **Next steps**

The Regional Strategic Review

The Regional Strategic Review is being carried out to:

- quantify the long-range demographic and economic trends in the MTA region
- gauge the impact these trends could have on MTA's networks and services and;
- begin the process of identifying potential strategies to address these impacts, for inclusion in the next 20 Year Needs Assessment and 2010-2014 Capital Plan

A cooperative effort with MTA Capital Program Management

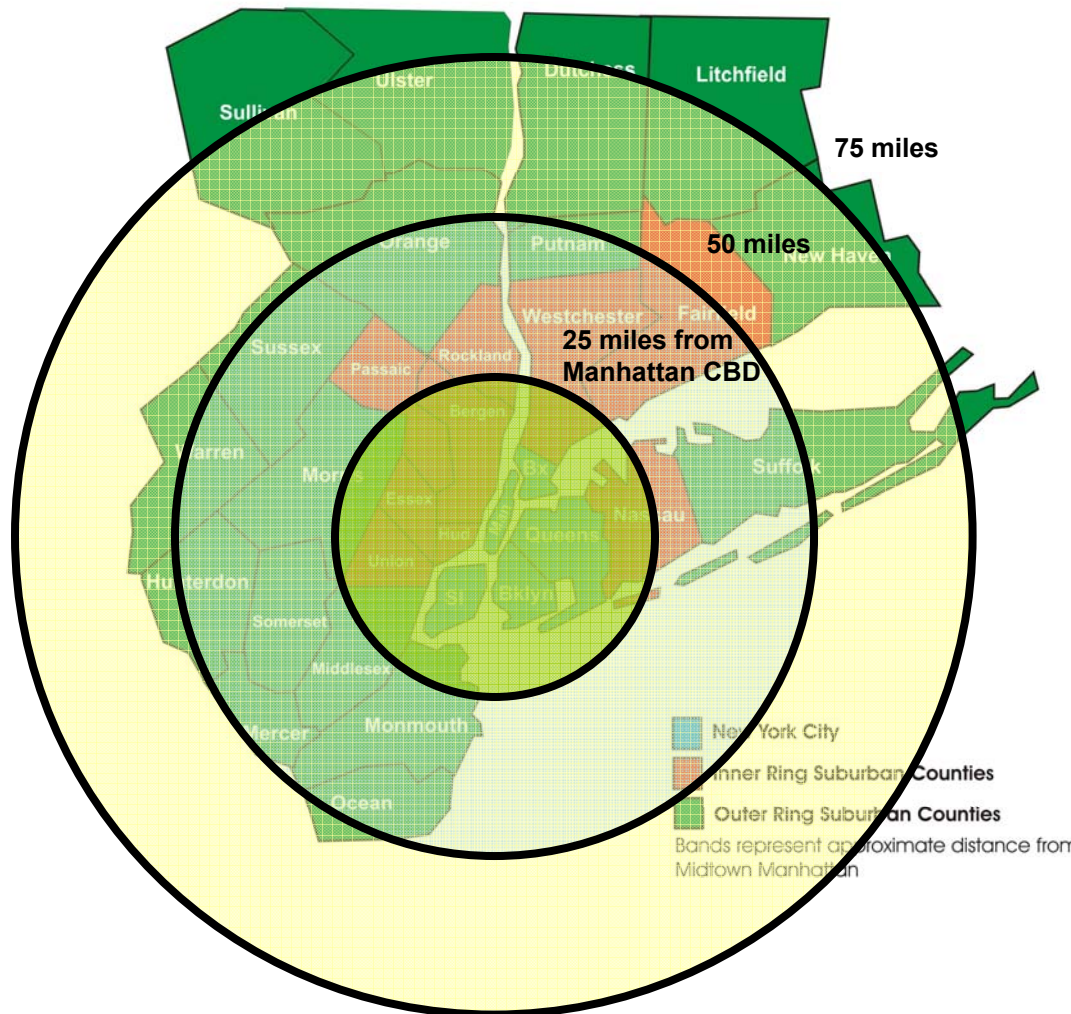


The Regional Strategic Review

Status

Regional scan	Completed
Gauge potential impacts on MTA services	Nearing completion
Confirm existing plans/identify potential improvements as part of 20 Year Needs early start	Mid-2007
Complete 20 Year Needs Assessment	Mid-2008
Complete draft of next 5 year Capital Plan	3rd quarter 2009

How is the Region Changing?

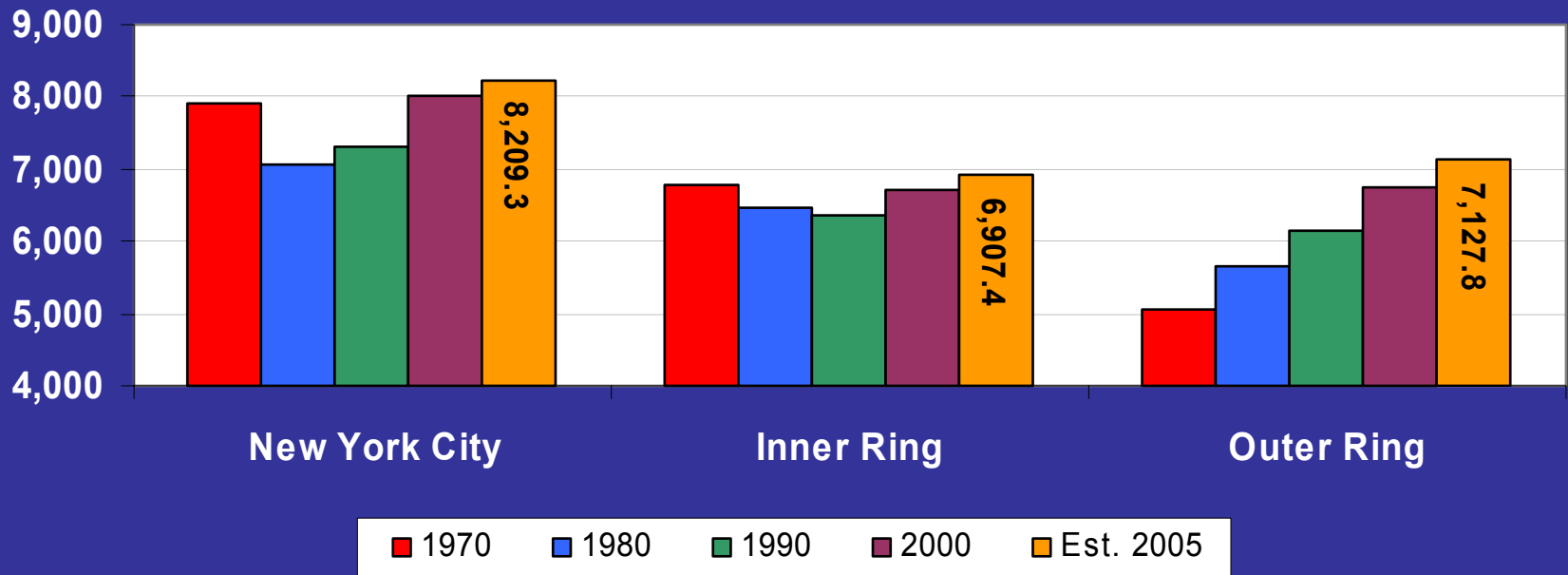


- 31 County Metropolitan Area
- 3 analysis areas:
 - NYC
 - Inner Ring
 - Outer Ring

How is the Region Changing?

Population has increased

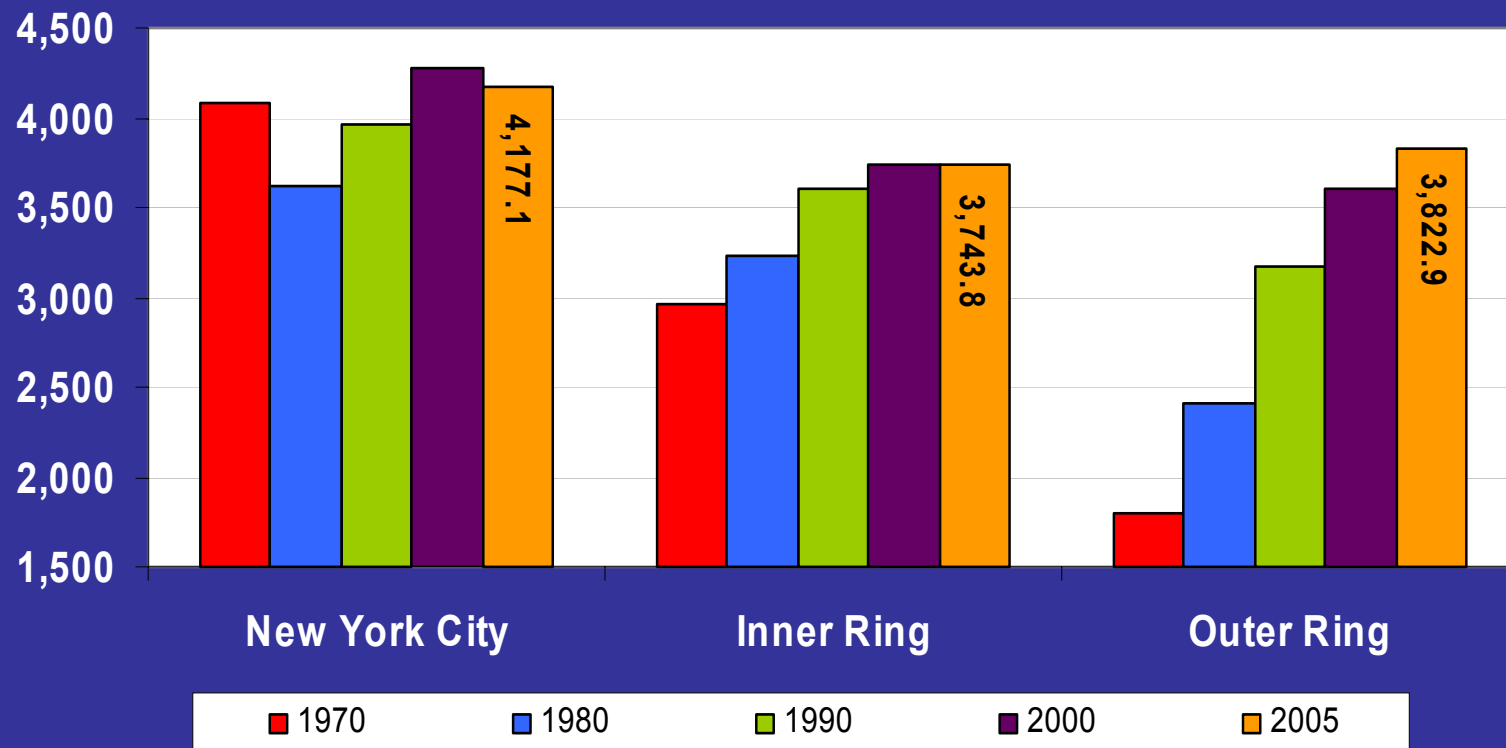
- NYC's population grew from 7.3 million in 1990 to 8.2 million in 2005
- The region's population grew from 19.8 million in 1990 to 22.2 million in 2005
- Three quarters of this growth is due to immigration



How is the Region Changing?

The region's economy is undergoing significant change

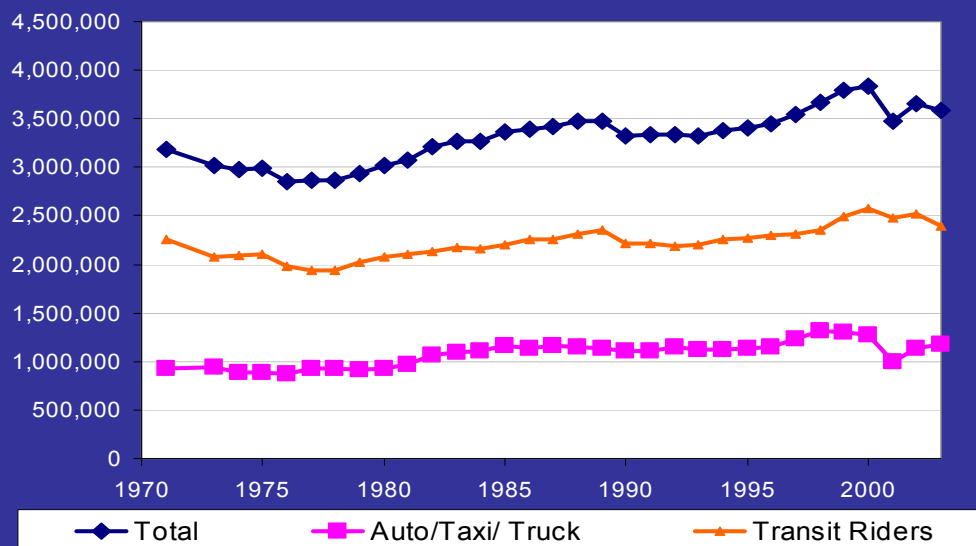
- Employment grew by 8%, or 900,000 jobs since 1990
- The economy is increasingly service based
 - 90% of the region's jobs are service based vs 84% in 1990



How is the Region Changing?

Regional travel will continue to increase

- Travel to Manhattan is up
- Travel among the City's outer boroughs is up by 9%
- Reverse commutation travel is up
 - Reverse commutation on MTA commuter services grew by 84% from 1990 to 2000



How is the Region Changing?

MTA Ridership is at historic highs

TRANSIT RIDERSHIP REACHES HIGHEST SINCE JUNE OF 1971

On a roll: Subways' straphanger surge

Track record: 1.5B rode subway

IF YOU FIX IT, they will come.

Despite a February fare hike and a three-day transit strike, subway ridership last year hit 1.45 billion — the highest in more than 50 years.

New subway cars and other upgrades have made tube travel more reliable and have helped lure more than 23 million new riders to the rails in 2005 compared with the year before, Transit Authority officials and rider advocates said yesterday.

The record ridership "is an indication of the strong commitment we at the MTA have made to provide our riders with the finest mass transportation network in the country," MTA Chairman Peter Kalikow said in a statement.

The Metropolitan Transportation Authority has allocated more than \$48 billion since the 1980s for high-tech subway cars, track replacement, station renovations and other improvements. MetroCards and new fare-paying technology now reduce the per-trip cost as more riders use the system.

"Twenty-five years ago, your trains broke down all the time, they were covered in graffiti and you had no incentive to use transit," Gene Russianoff of the Straphangers Campaign said. "Billions of dollars later, your trains are reliable and you get discounts the more you use the system. The lesson of all this is, if you invest in transit, the riders will come."

The average fare last year was \$1.27 per trip, which is lower than the average fare in 1996, according to TA reports.

Bus ridership dipped slightly last year

Photo by falling bar numbers, all have said. TA had to cut which commuted, reduced ridership or cost to

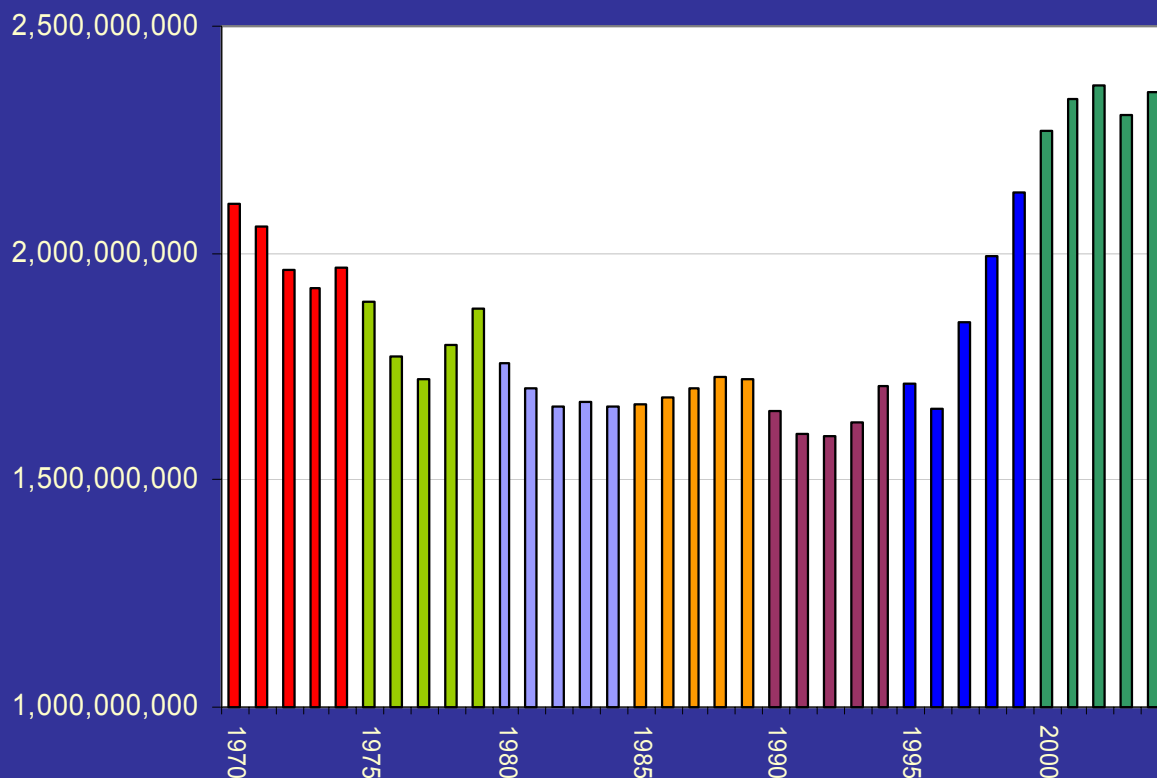
Average number of trips on a weekday (in millions)

Ridership high

1.7.5 rid-York

BY PETE DONOHUE
DAILY NEWS STAFF WRITER

DAILY NEWS
Saturday, February 11, 2006



Annual MTA Public Transit Riders
(Subway, Bus, Commuter Rail)

Where is the Region Heading?

A broad consensus on growth

(NYC, PANYNJ, RPA, NY & NJ metropolitan planning organizations)

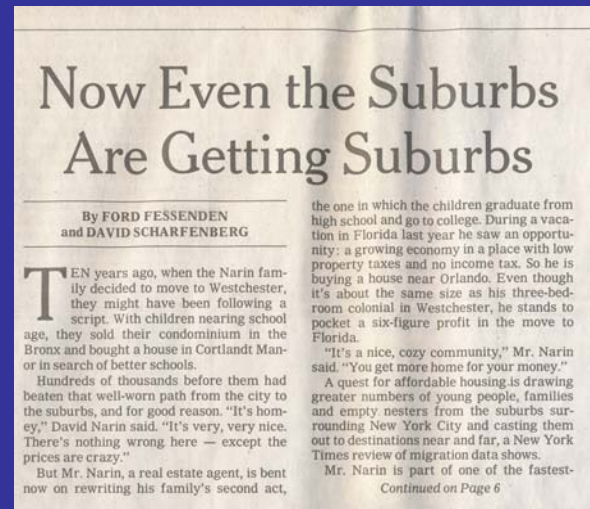
- Population will continue to grow
 - NYC's population will reach 9.5 million in 2030 (8.2 million today)
 - The region's population will grow to 26.1 million in 2030 (22.2 million today)
- The population will continue to age
 - 10.5% of the population will be 70+ in 2030 (8.8% in 2000)
- Immigration will continue to fuel growth
 - Today, 12% of US population is foreign born, the highest since 1930.
(*Brookings Institution*)



Where is the Region Heading?

Past travel trends will continue and intensify

- Travel to the Manhattan CBD will grow
- Travel to non-Manhattan CBD destinations will grow
- Intra-suburban travel will grow
- Longer trips
- More non-peak trips
- Less “Monday-Friday” travel



How are NYC and the Suburban Counties Planning for this Growth?

New York City

- Commercial and residential redevelopment in areas that have lagged in growth since the 1970's. Examples include:
 - Brooklyn: Williamsburg, Brownsville, Bedford Stuyvesant, East NY, Southern Brooklyn
 - Bronx: South Bronx
 - Queens: Long Island City, Astoria, Rockaways
 - Manhattan: West Midtown, Lower Manhattan, Harlem
 - Staten Island: North Shore, South Shore
- New growth should be accompanied by additional infrastructure improvements (e.g., housing, education, transportation, other)



How are NYC and the Suburban Counties Planning for this Growth?

New York City - PlaNYC

- A formal City campaign to prepare for a future of growth.
- 2030 target year.
- Transportation is one of many issues.
- Close, continuing coordination between MTA and NYC: growth assumptions, locational insights, strategy concepts



How are NYC and the Suburban Counties Planning for this Growth?

Suburban Counties

- Limitations on where growth can occur: topography, open space, watersheds, lack of supporting infrastructure, zoning restrictions, lack of undeveloped land
- Policies differ among counties: manage growth, limit growth
- Re-development opportunities: former commercial campuses, institutions, existing downtowns
- Growth is largely controlled by localities
- Station access and egress will be important issues



Possible Implications for MTA Network

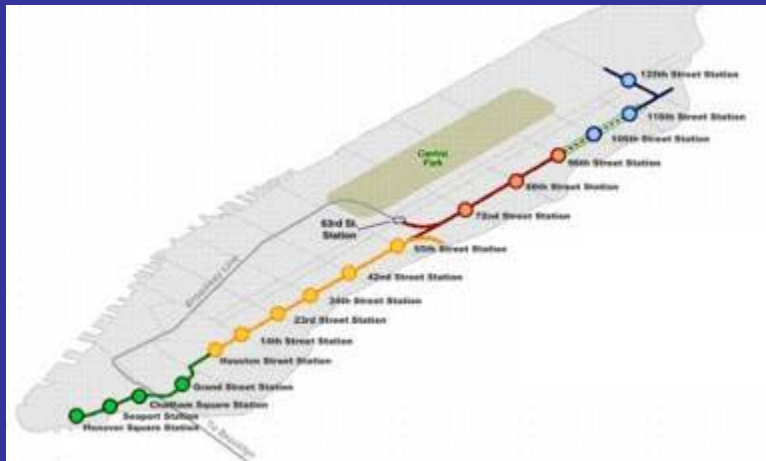
General Conclusions

- By 2030, robust growth in Manhattan employment could induce a significant increase in ridership on selected segments of MTA's subway and commuter rail networks.
- Broadly, the ability of MTA's network to accommodate the growth in demand will largely depend on:
 - Success in maximizing available capacity (e.g., rolling stock, signaling and service strategies).
 - Completion of the full East Side Access and Second Avenue Subway programs.

Possible Implications for MTA Network

NYCT

- The full-build Second Avenue Subway will address capacity issues on Manhattan's East Side.
- Capacity issues will continue on the Queens Boulevard corridor and may become an issue on the West Side subway network in Manhattan.
- Potential need for additional bus depots.
- Need for additional rail cars and buses.
- Potential station impacts.



Possible Implications for MTA Network

Metro-North

- Targeted fleet expansion and strategic track and signal improvements will address most capacity issues.
 - GCT, Park Avenue Viaduct, Mid-Harlem, Bronx
 - New market opportunities.

LIRR

- Full implementation of ESA, which assumes the completion of Main Line Corridor, the addition of new yards and various track capacity improvements throughout the system, will address most capacity issues on LIRR system.
- Possible capacity issues on the Pt. Washington branch.
- Reverse commute market opportunities to employment centers in Nassau and Suffolk counties.



Next Steps

Include results in the 20 Year Needs Assessment

- Develop a Long Range Planning element.
- Identify early targeted systems planning study needs on possible capacity issues for programming into the 2010-2014 Capital Plan.

Examine ways to use existing network to solve 2030 issues.

Study-based projects programmed in future Capital Plans.



Pursue forecast refinements

- PlaNYC 2030 and emerging suburban county plans.
- Regional forecast update.