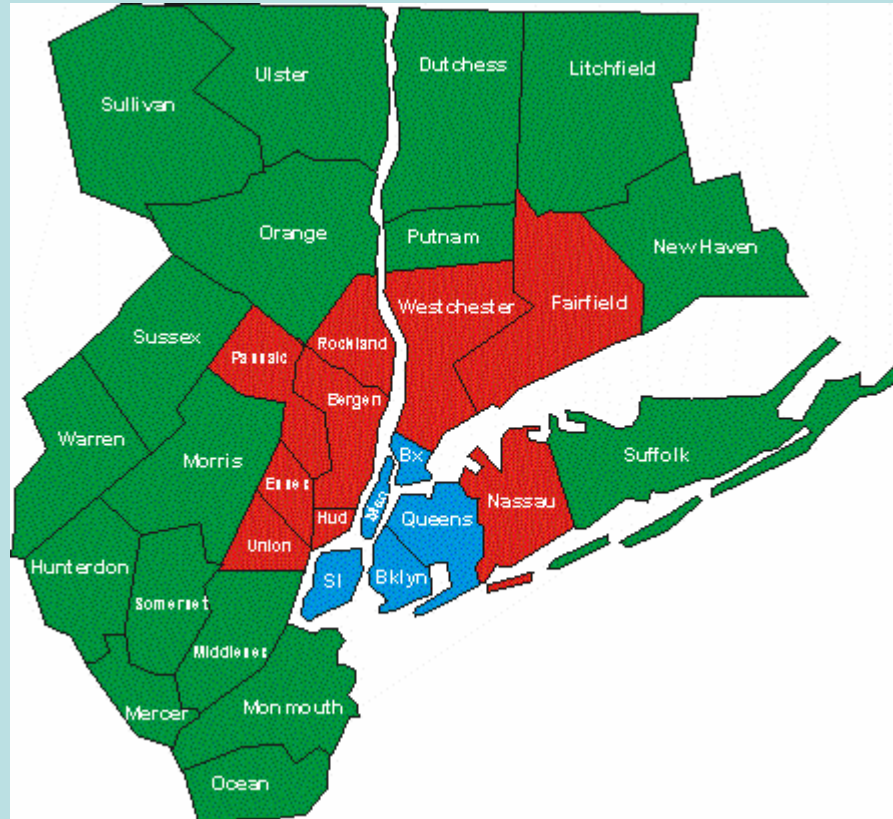


Regional Strategic Review



May 30, 2006

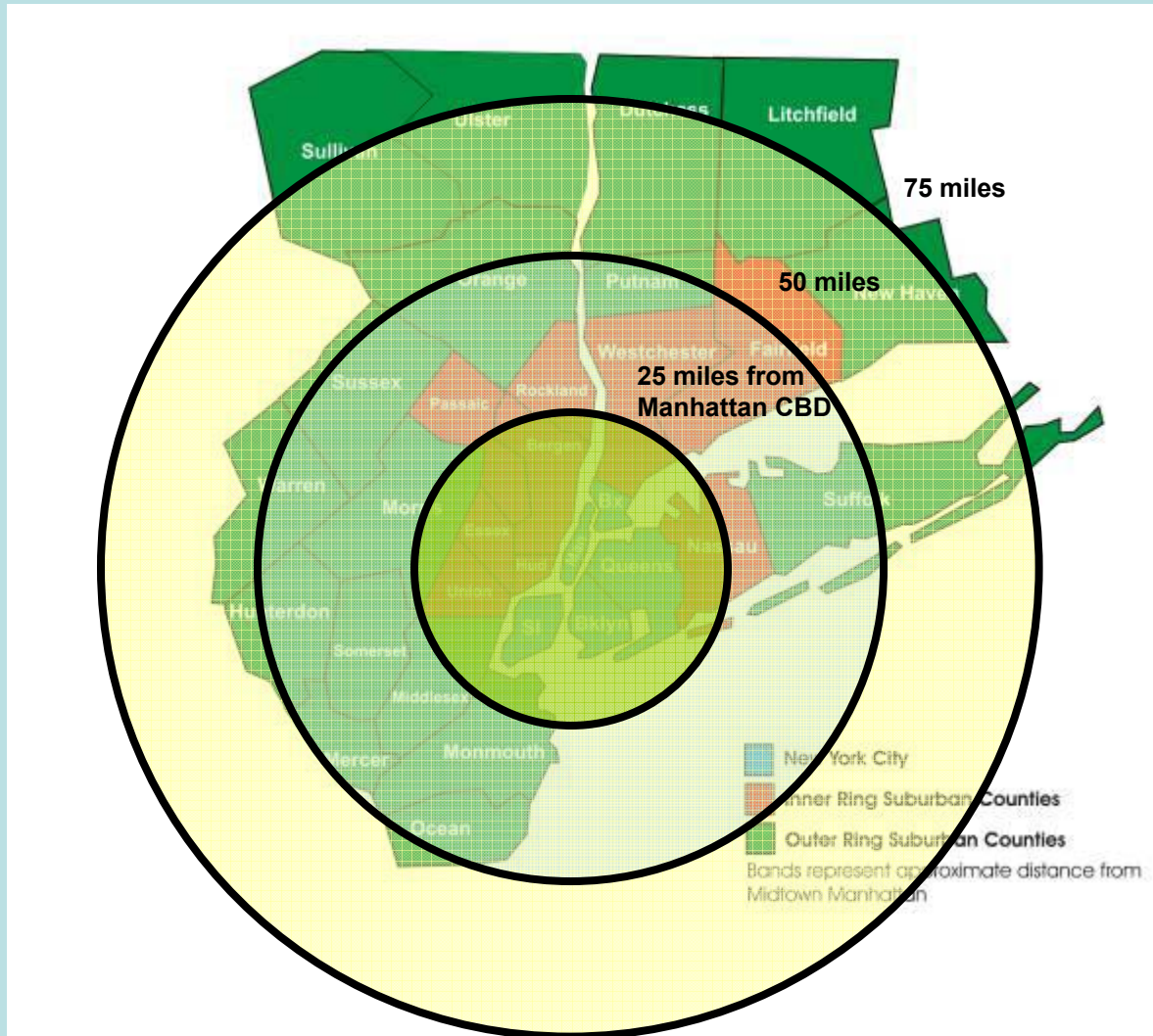
Purpose of Presentation

- Introduce a regional strategic review to supplement the next 20 Year Needs Assessment

Topics

- How is the region changing?
- Where is the region heading?
- Regional strategic review
- Next steps

How is the Region Changing?



- 31 County Metropolitan Area

- 3 analysis areas:

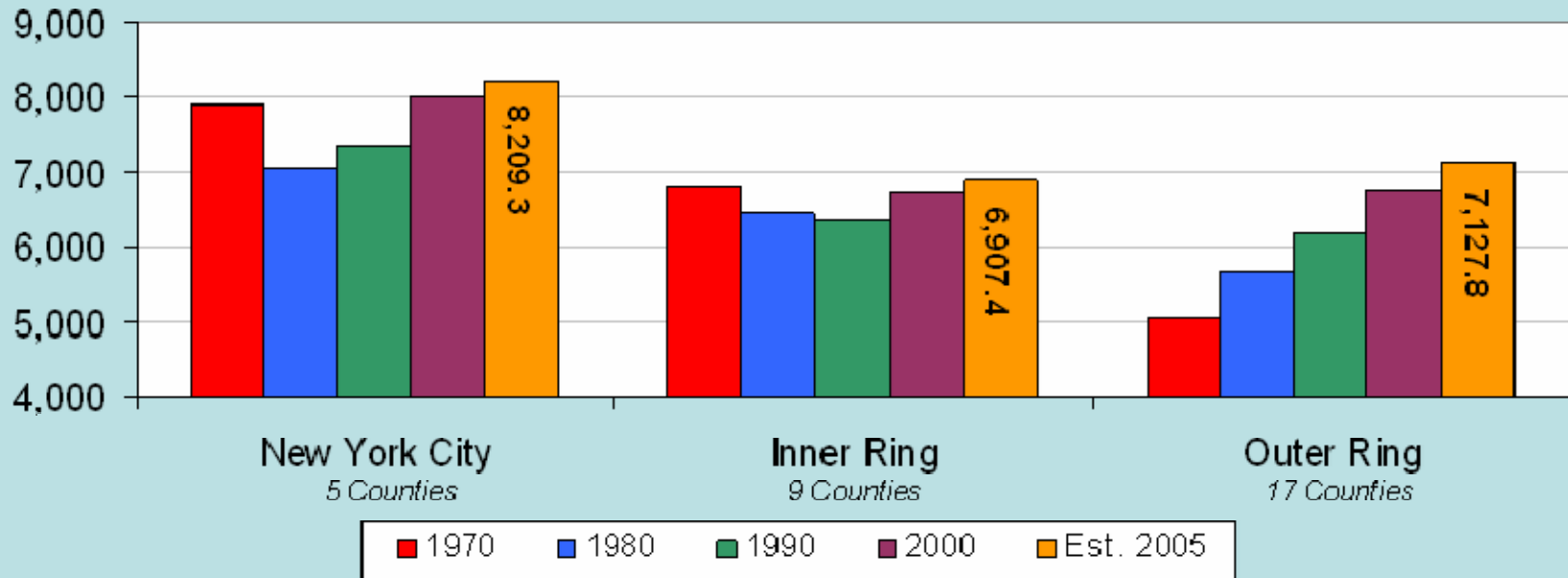
- NYC
- Inner Ring
- Outer Ring

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?



How is the Region Changing?

- **The population is aging**

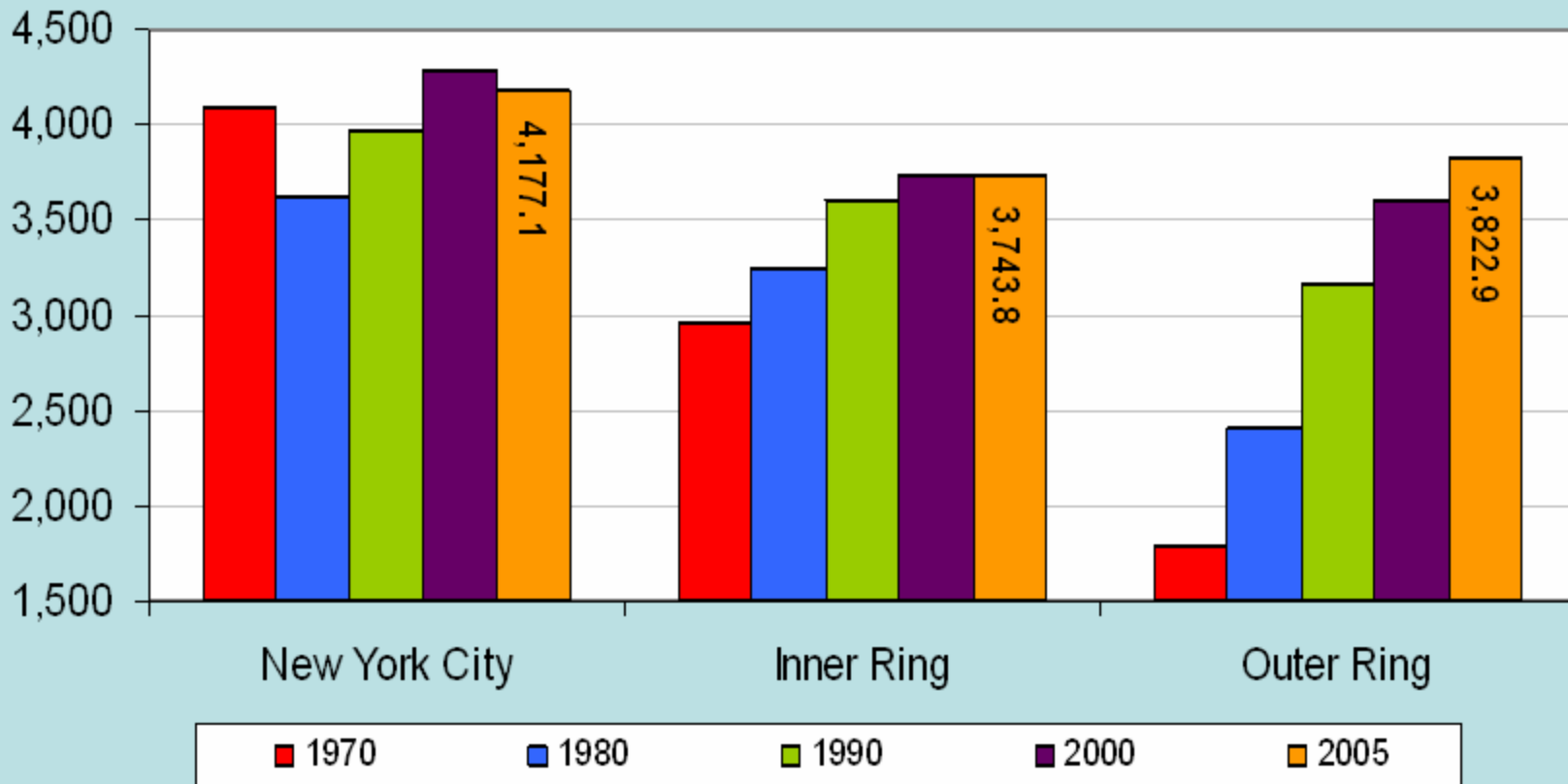
- Between 1970 and 2000
 - > The under 20 population declined by 15%
 - > The 35-50 group grew by 38%
 - > The over 70 population rose by 52%

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?

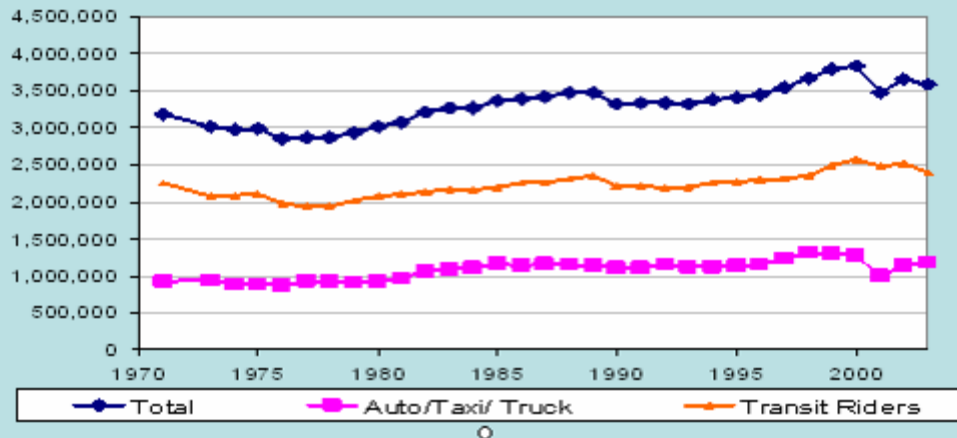
Regional Employment (Thousands)



How is the Region Changing?

Travel

- Travel to Manhattan is up

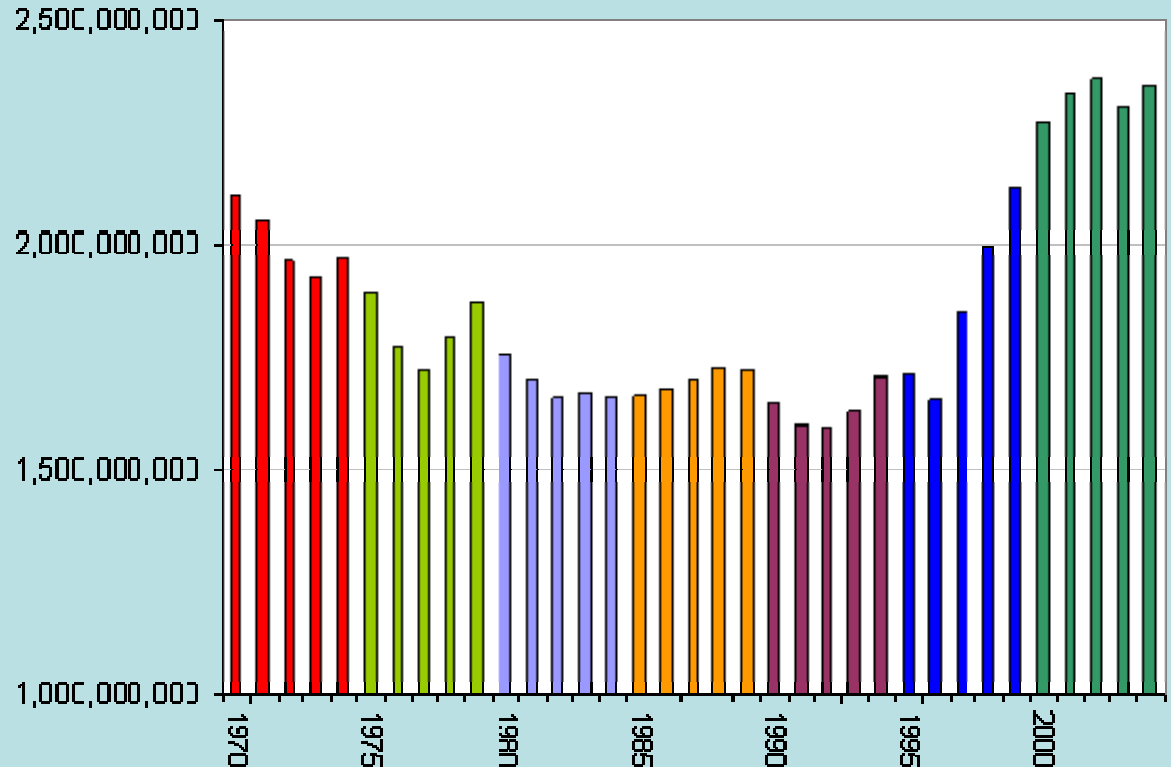


- Travel among the City's outer boroughs is up by 9%
- Reverse commutation travel is up
 - > Reverse commutation on MTA commuter services grew by 84% from 1990 to 2000

How is the Region Changing?

- MTA Ridership is at historic highs

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



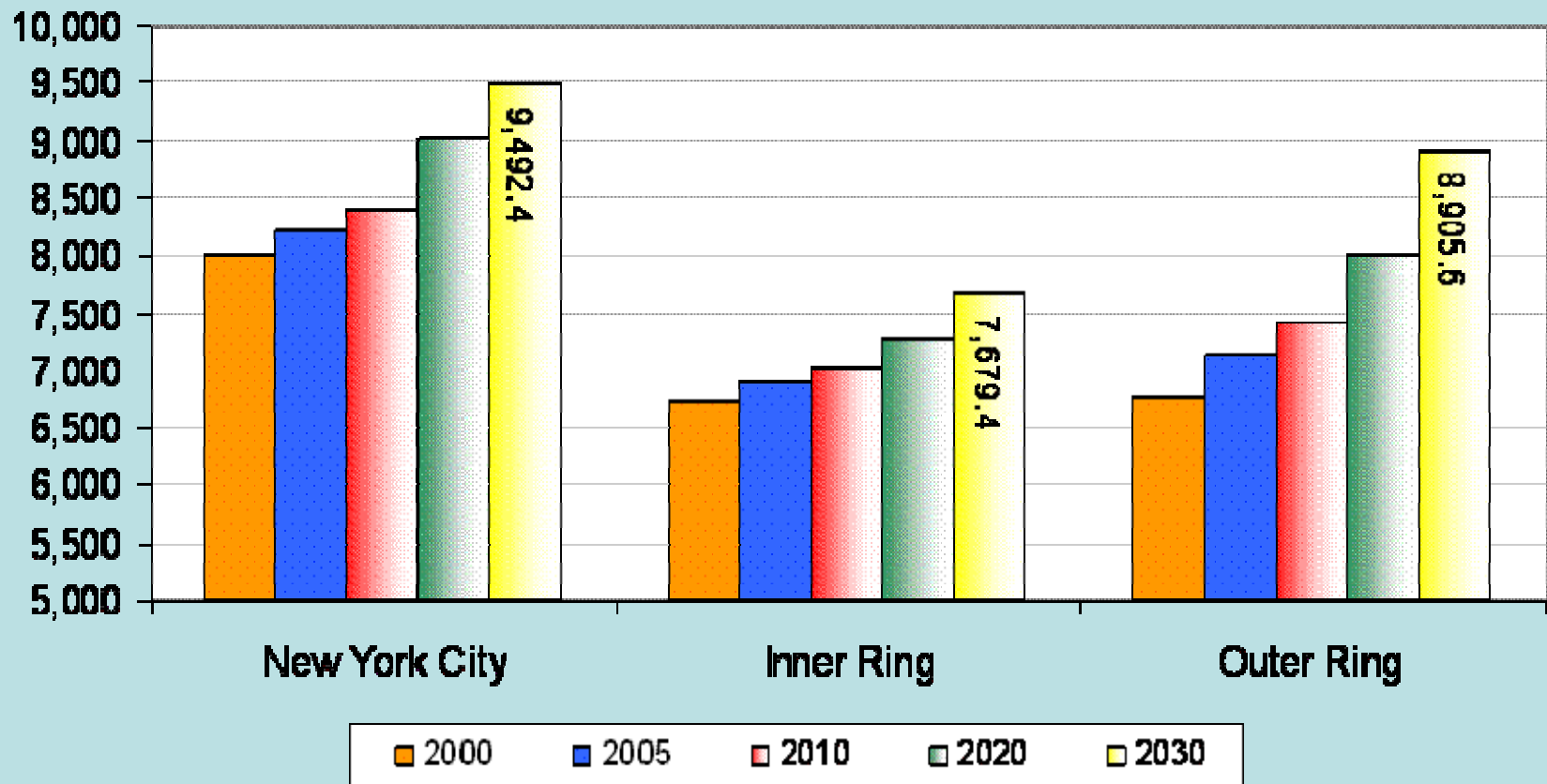
Where is the Region Heading?

- **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*)



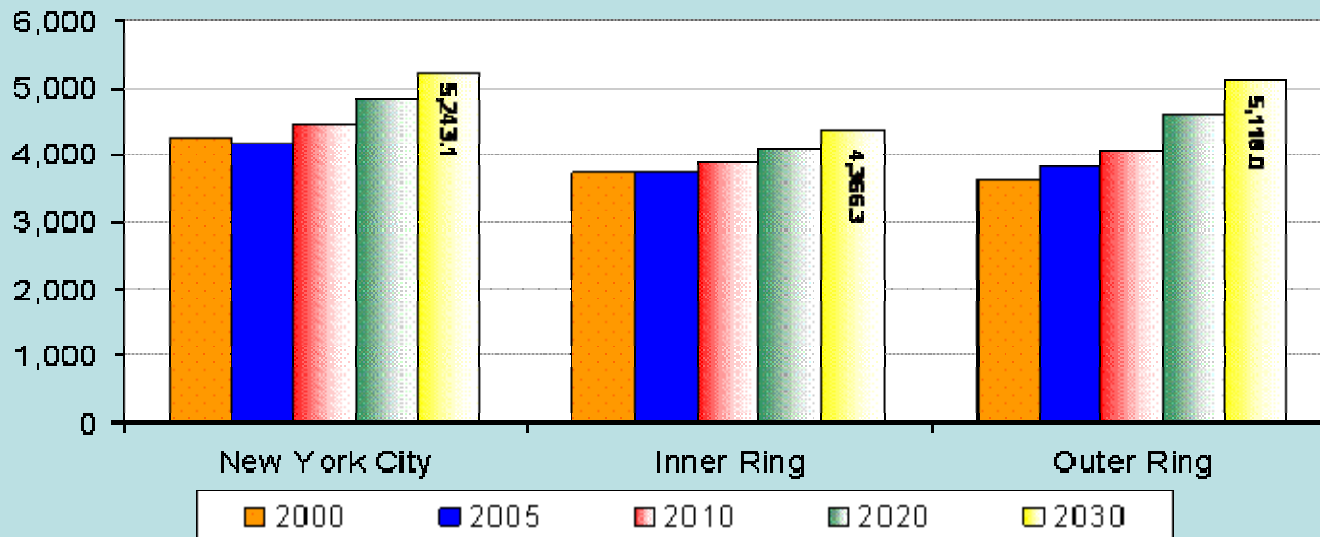
Where is the Region Heading?

Regional Population 2000-2030 (Thousands)



Where is the Region Heading?

Regional Employment 2000-2030 (Thousands)



Alive and Well in Silicon Alley



Where is the Region Heading?

■ Past travel trends will continue and intensify

- Travel to the Manhattan CBD will grow

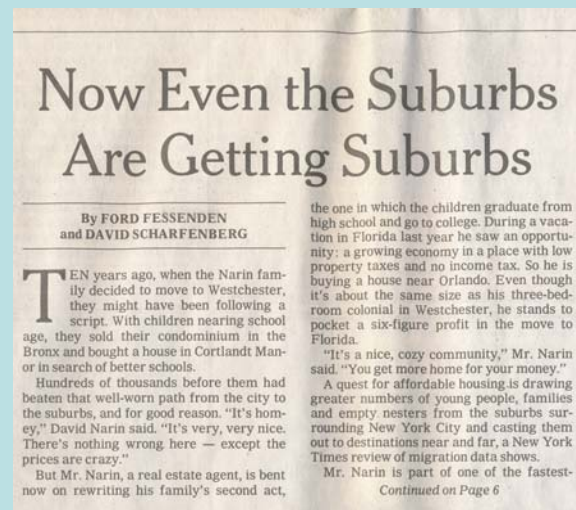
- > “Manhattan remains the region’s undisputed employment center...”
(Federal Reserve Bank, October 2005)

- Travel to non-Manhattan CBD destinations will grow

- > Growth in non-Manhattan CBD’s

- LIC
- Downtown Brooklyn
- White Plains
- Nassau Hub
- Stamford
- Greenwich
- Newark

- > Growth in reverse commuting on commuter services and NYCT



Where is the Region Heading?

■ Past travel trends will continue and intensify

- Intra-suburban travel will grow
 - > Non-Manhattan travel (which is twice the size of Manhattan travel) will grow
- Longer trips
 - > Housing prices
- More non-peak trips
 - > Service economy
 - > Commuter trips are 1/5 to 1/7 of all daily trips
- Less “Monday-Friday” travel
 - > Aging population and workforce
 - > Service economy
 - > Technology

Housing through the roof
New York's rising fortunes were captured this week in a wealth of facts and figures about the city's universal source of pride, pleasure and pain: housing.
First, the Real Estate Board reported that the market for co-ops, condos and houses has been on fire in Brooklyn as buyers have flocked to the borough. Then, the city's most comprehensive survey revealed

New Homes Near a Planned Train Stop

By LISA PREVOST

BRIDGEVILLE
ABOUT 20 years ago, Kerry O'Sullivan bought a 3,300-square-foot home on Brentwood Avenue, one of the many carriage houses built with residential housing that sprang off the Kings Highway East corridor. Mr. O'Sullivan, then a corporate manager dabbling in real estate investment, fig-



Varda, the sales director. "Values of other areas in town have almost topped out."
According to data compiled by Mark Markert, who presides at sales of Wilton Manors Real Estate in Roseton, the average price of single-family homes in the neighborhood around the Metro Center station East 23rd Street (Interstate 4) has risen 20.4 percent since 2007 to \$258,000. Meanwhile, the average price about 2 percent, to \$235,000.

CENSUS LOOKING FOR A WAY OUT

High prices drive people north

GRAPHIC COURTESY OF THE SPRINGFIELD REGIONAL DEVELOPMENT AUTHORITY

Regional Strategic Review

■ Possible Implications for MTA

- **Increased overall demand:** more Manhattan rail infrastructure, new partnerships
- **Increased off peak demand:** maintenance impacts
- **Increased demand outside Manhattan:** network infill, more rolling stock & support facilities
- **Increased immigration:** changes in communications
- **Longer commutation trips:** network extensions and enhancements
- **Aging workforce:** more escalators, elevators, paratransit

Regional Strategic Review

- **Agency activities ongoing and planned**
 - **NYCT Strategic Investments:** Subway signaling; subway system capacity evaluation
 - **LIRR Strategic Investments:** Main Line corridor improvements, planning for new mid-Suffolk yard
 - **MNR Strategic Investments:** Harlem Line third track; new geographic markets
 - **B&T:** Capacity evaluation
 - **LIB:** Route enhancements to meet historic ridership growth

Regional Strategic Review

- **New York City's Planning Process for 2030**
 - Planning to accommodate over 9 million people
 - Neighborhood based approach
 - Coordinating with MTA

Regional Strategic Review

▪ Evaluate risks and opportunities

- Protect core investments
- Assess capacity
- Define new/changing markets
- Develop capital and operating strategies; Weigh foreseeable resources

▪ Update planning tools

- New regional travel survey
- New forecasts and regional review
- Updated travel models

▪ Identify new investments

Next Steps

