

Looking Ahead

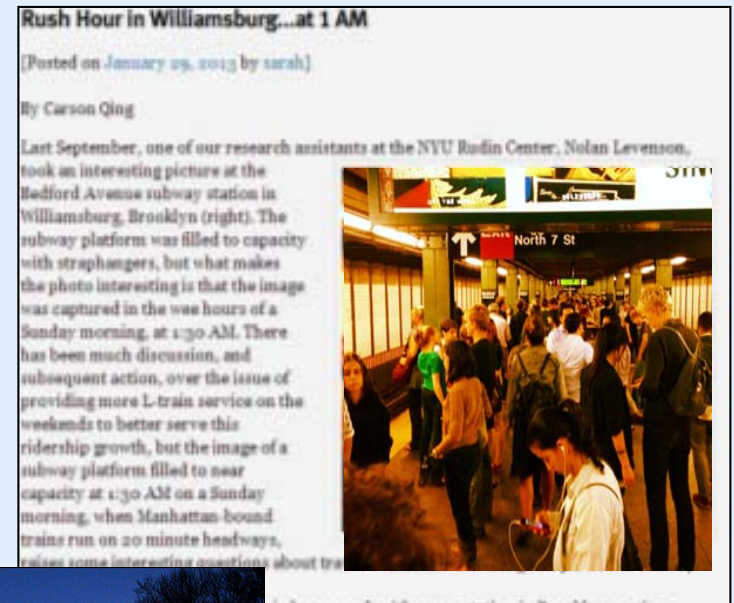
A Context for the Next Twenty Year
Needs Assessment

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



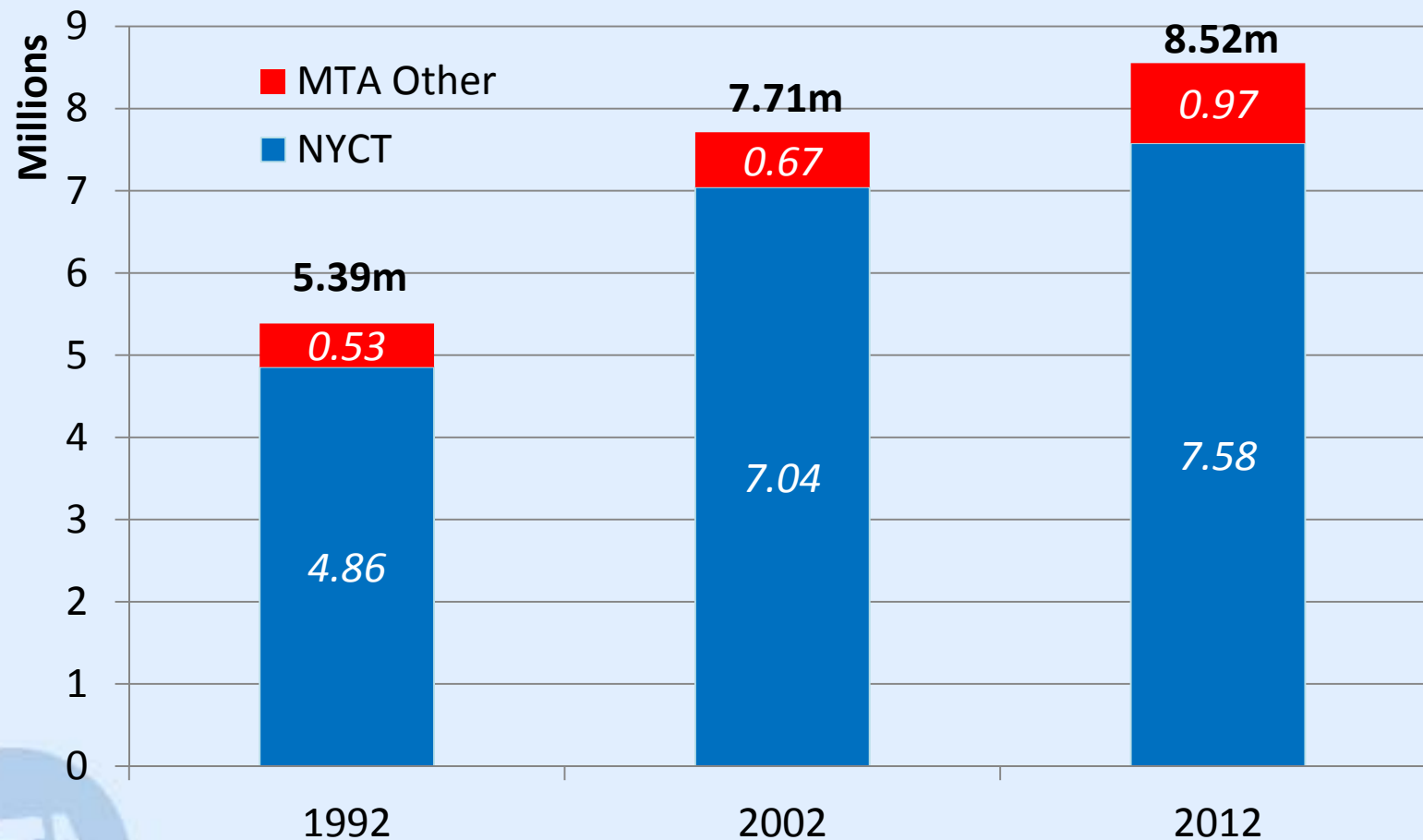
Travel Demand is Changing

- 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

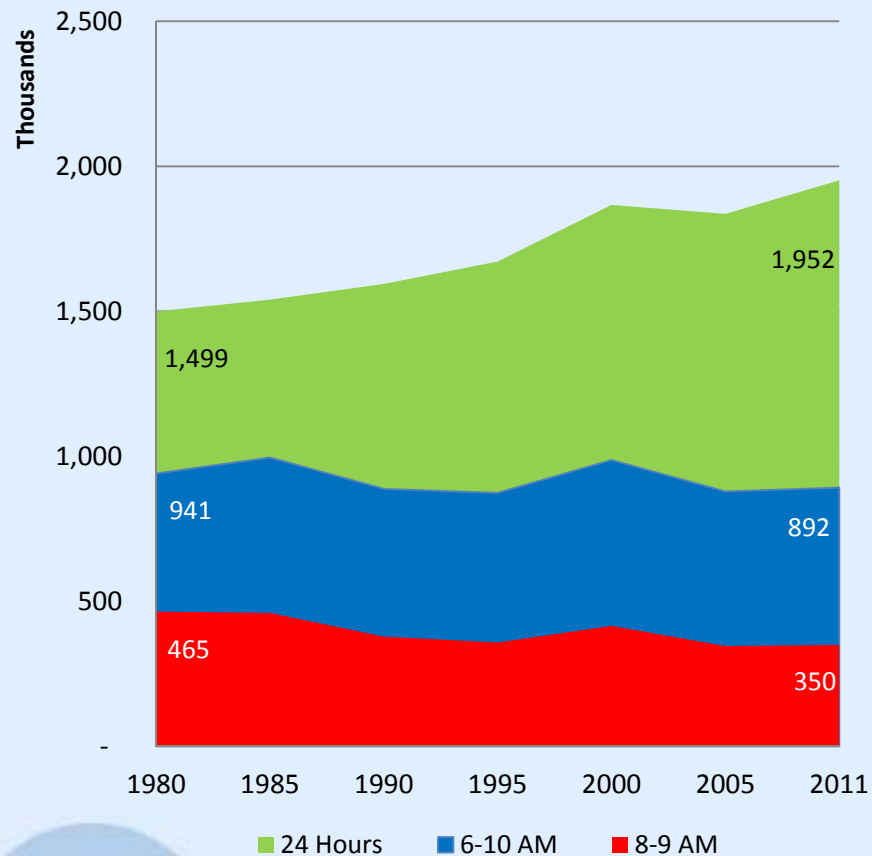
Average Weekday Paid Rides



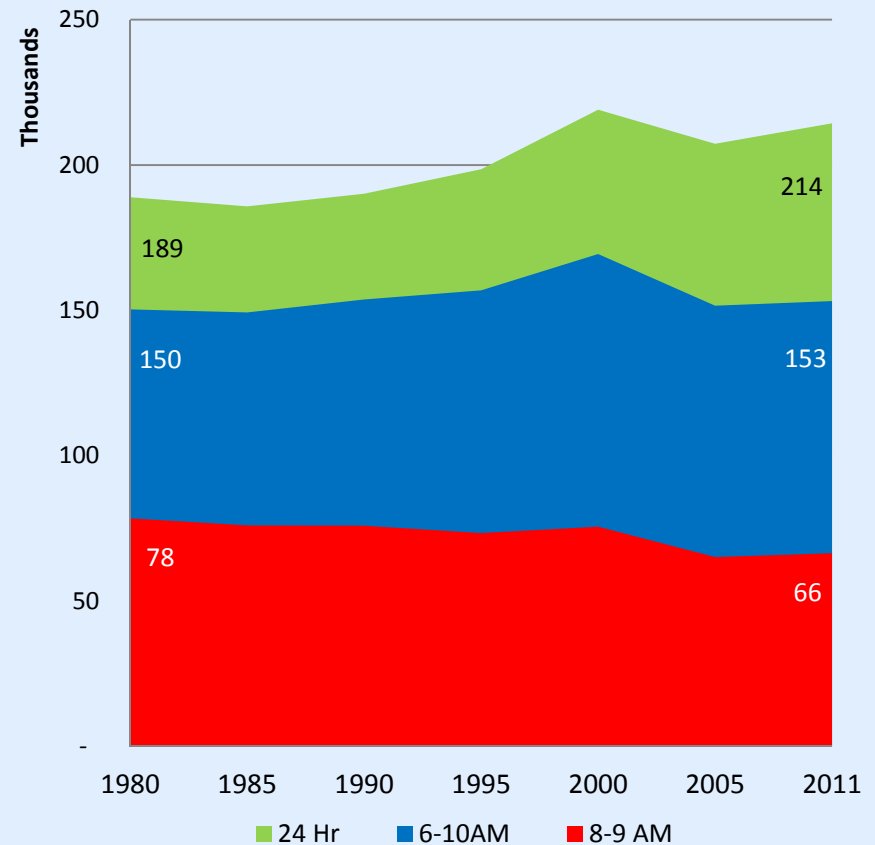
Source: MTA Annual Reports; excludes MTA B&T Crossings

Peak Hour Transit Use to CBD is Flattening

Subway Arrivals



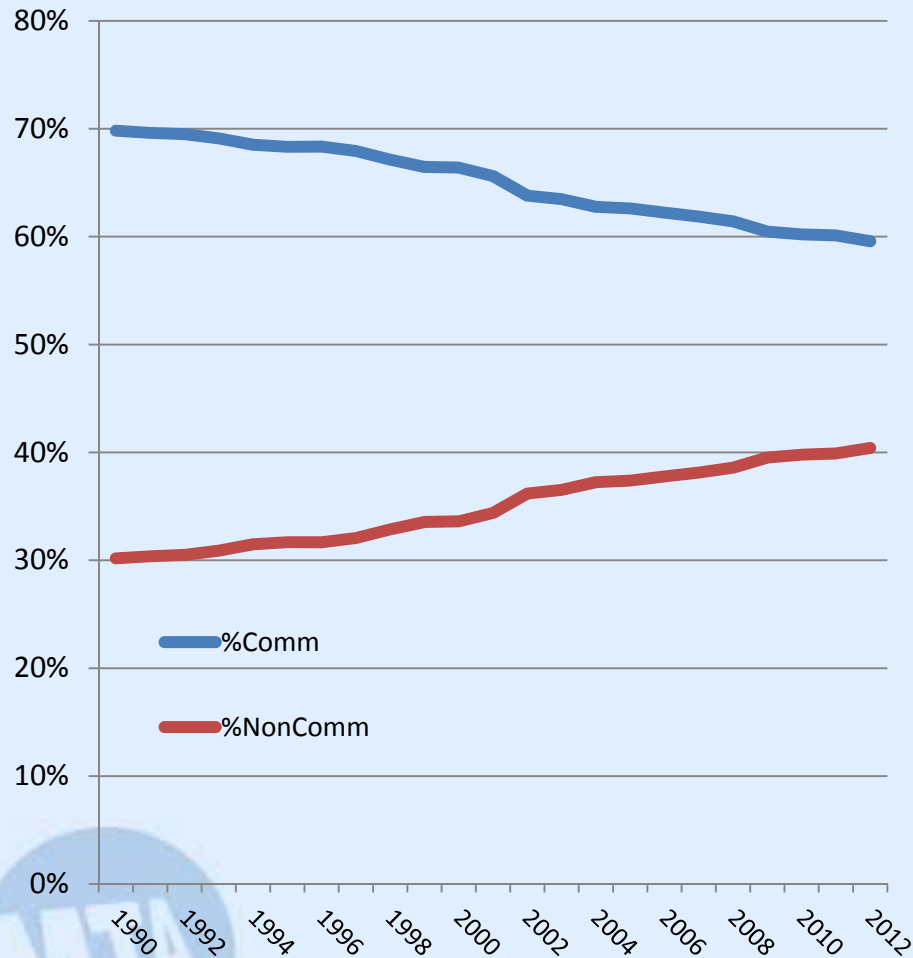
LIRR & MNR Arrivals



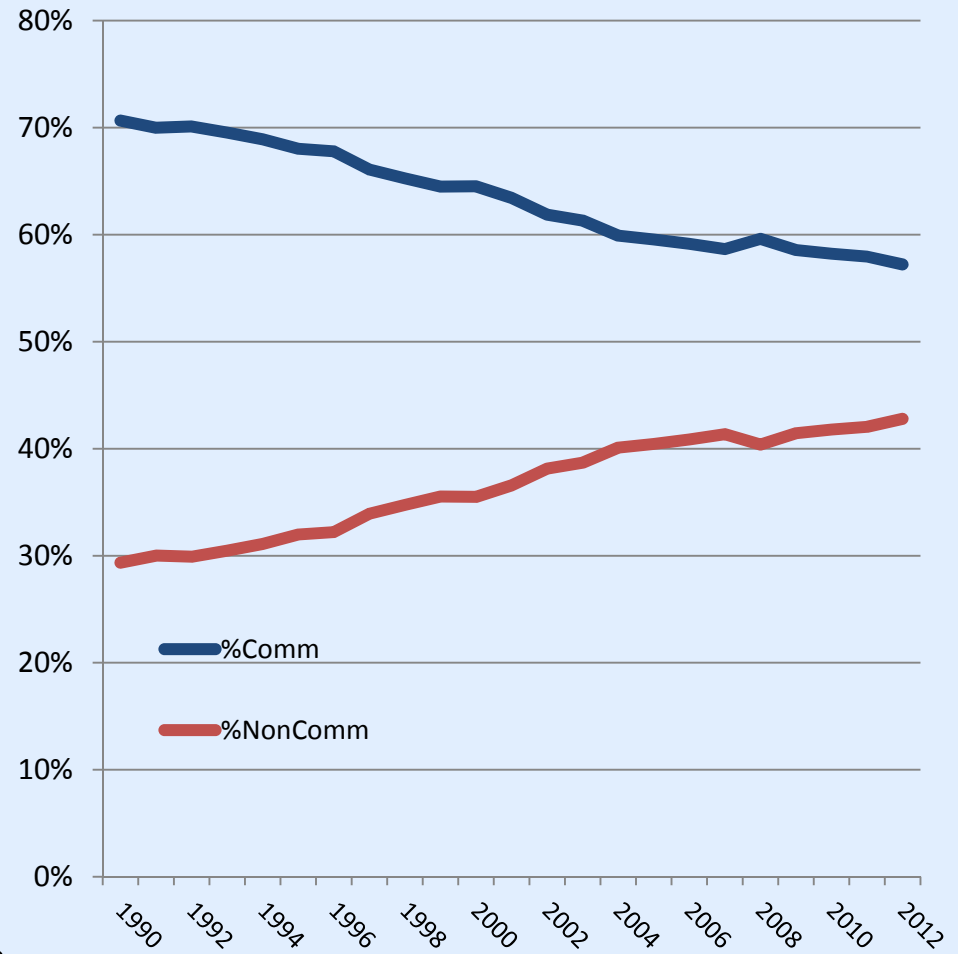
Source: NYMTC Hub-Bound data

“Commutation” Ticket Sales Trending Down, While “Non-Commutation” Tickets Sales Growing

MNR



LIRR

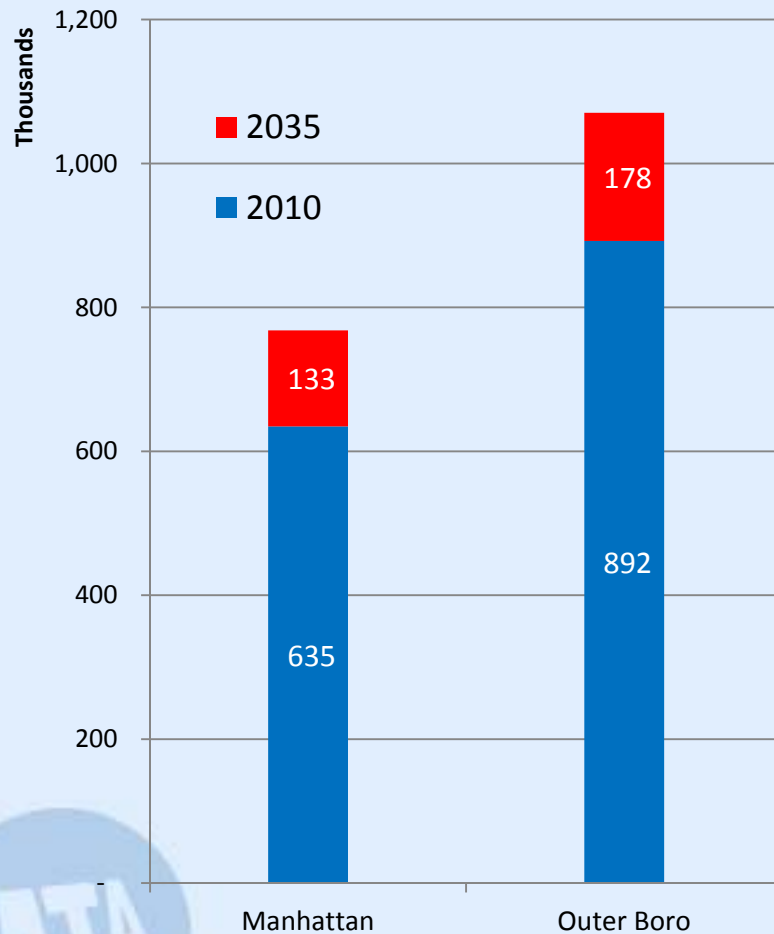


Source: MNR and LIRR 2012 Reports

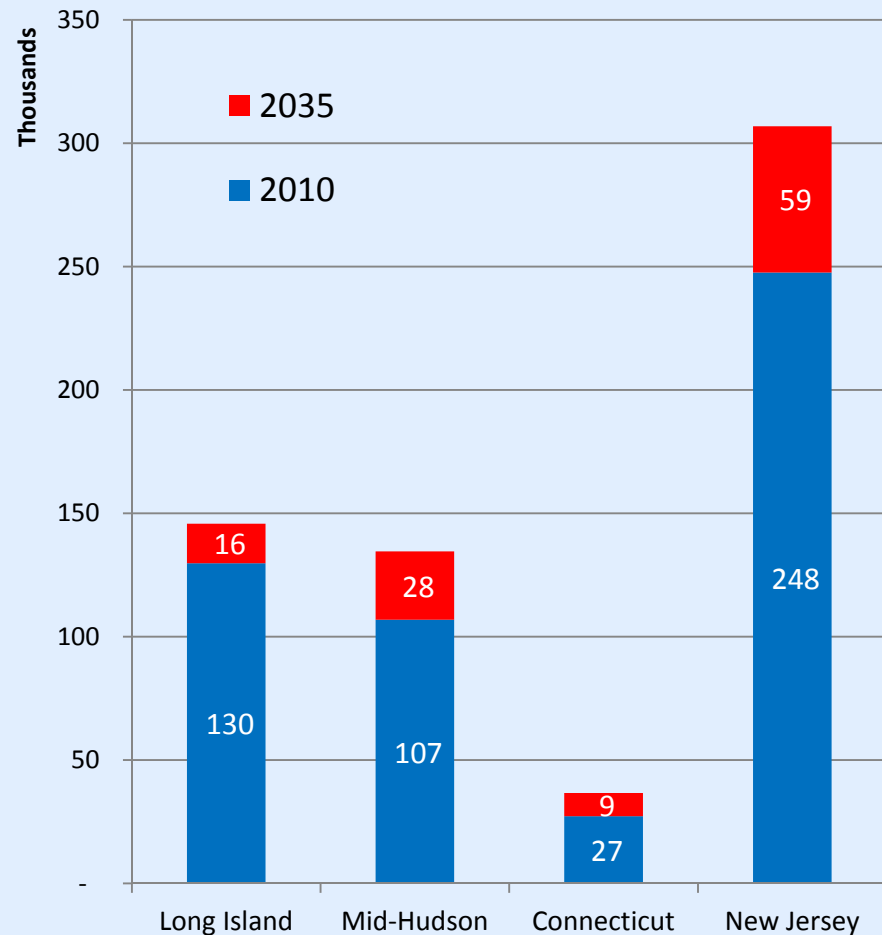
Potential Growth in Work Trips to Manhattan

2010 and 2035 Increment, All Modes, by Residence of Workers

NYC Residents



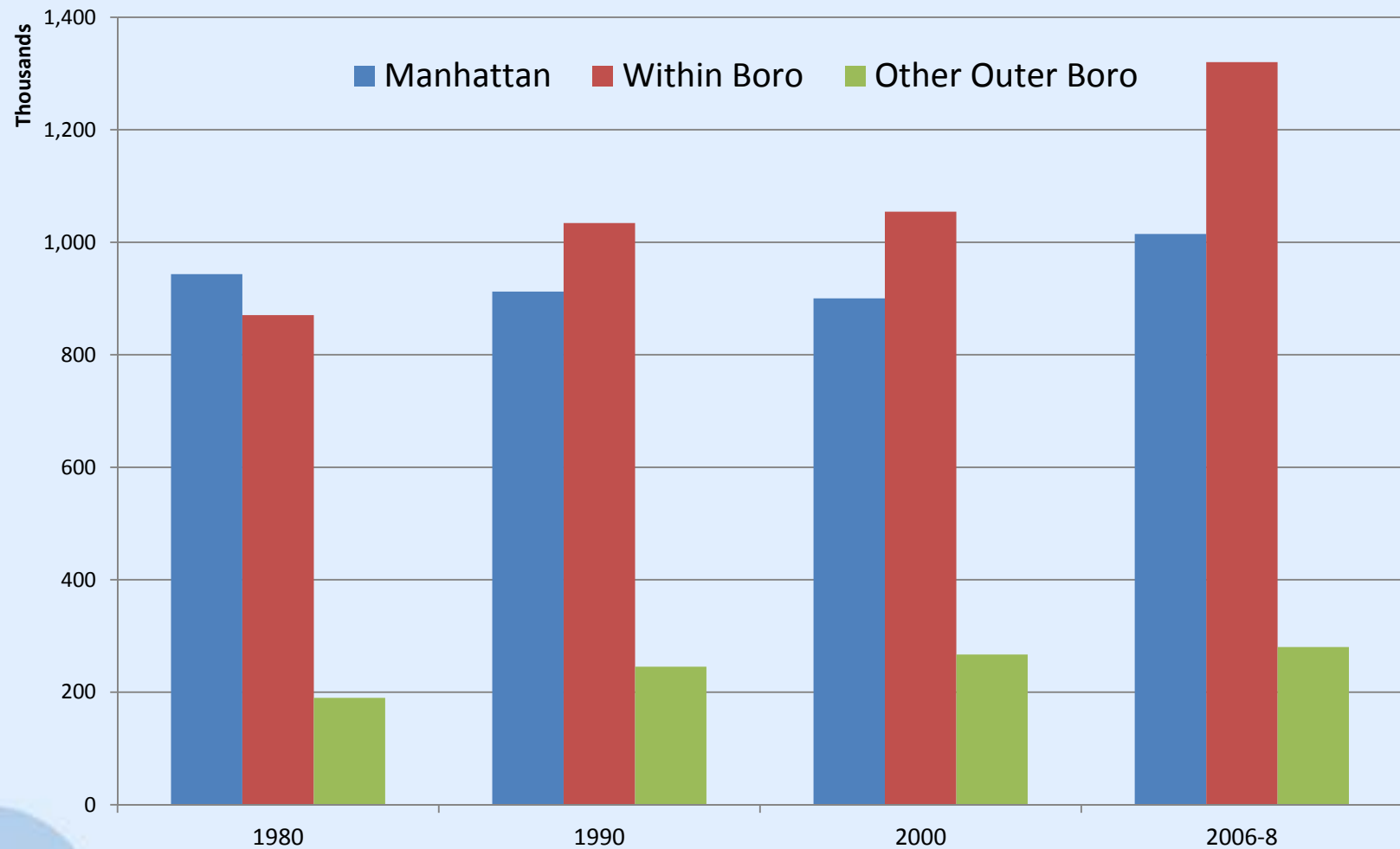
Suburban Residents



Source: 2010-2035 MTA forecasts

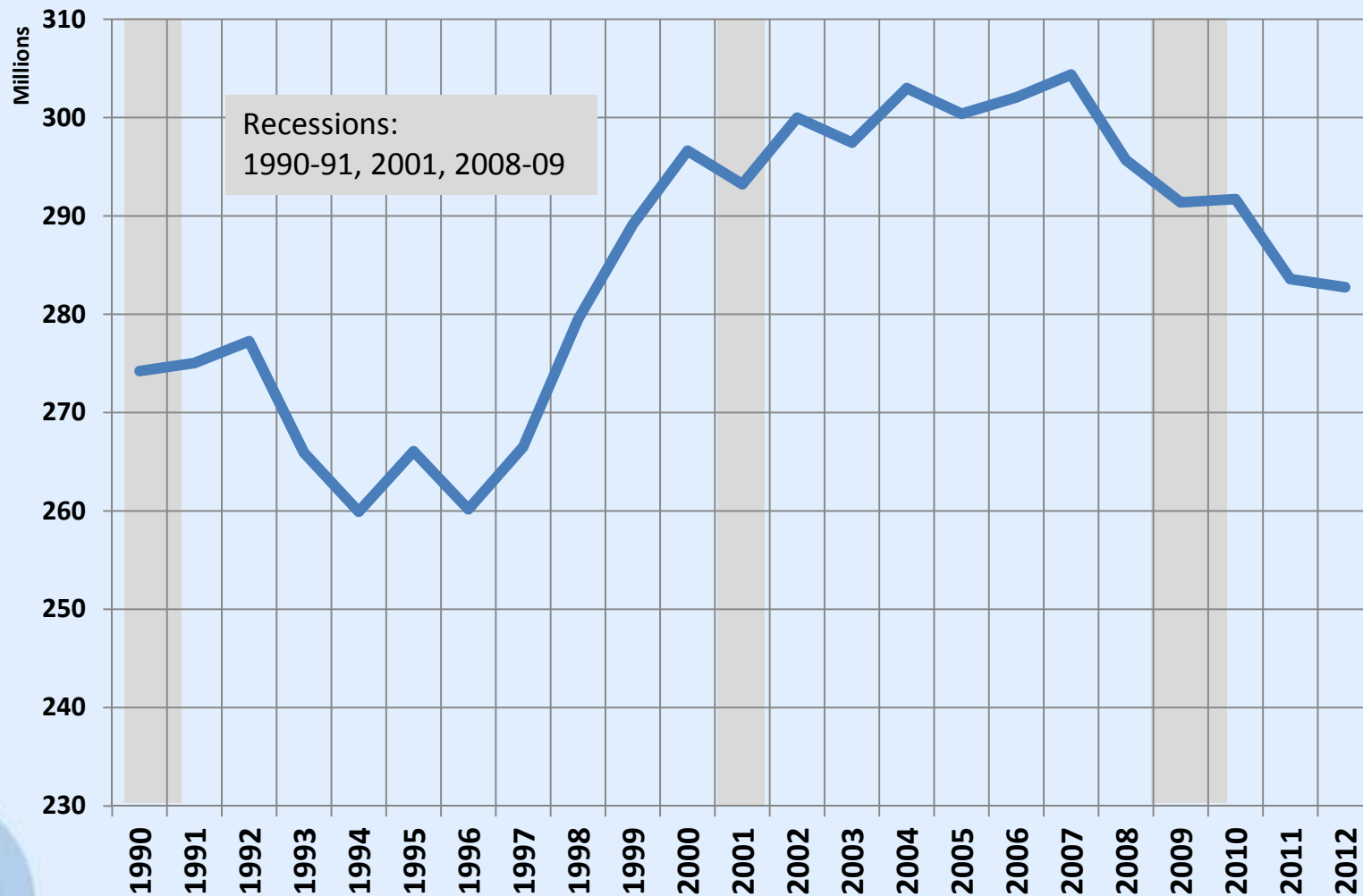
Destinations of Outer Borough Workers

All Modes



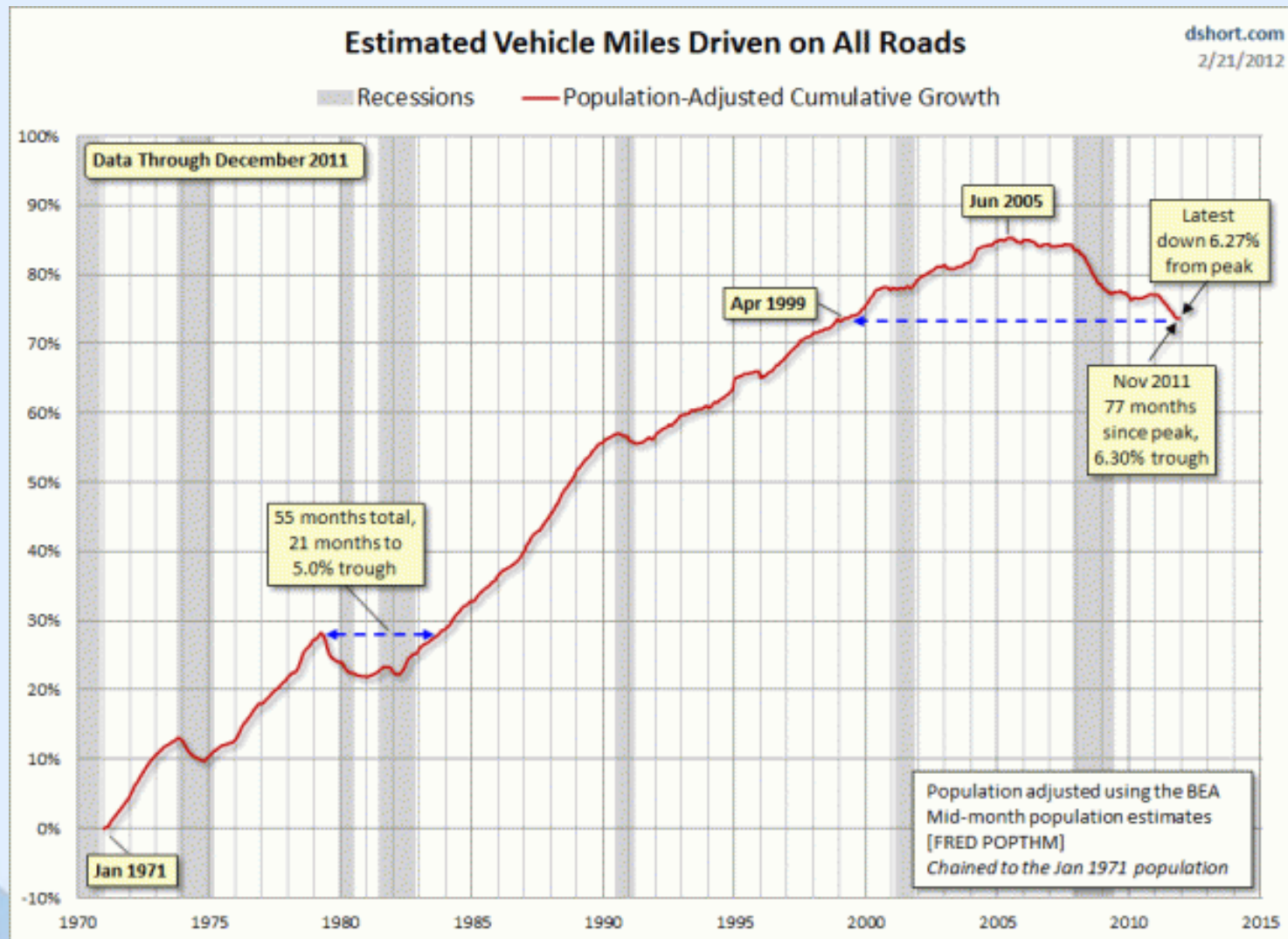
Source: Census JTW Data, selected years, all modes

Annual Crossings for MTA Bridges & Tunnels Trending Down Since 2007



Source: MTA B&T data

Nationwide Auto Usage is Dropping

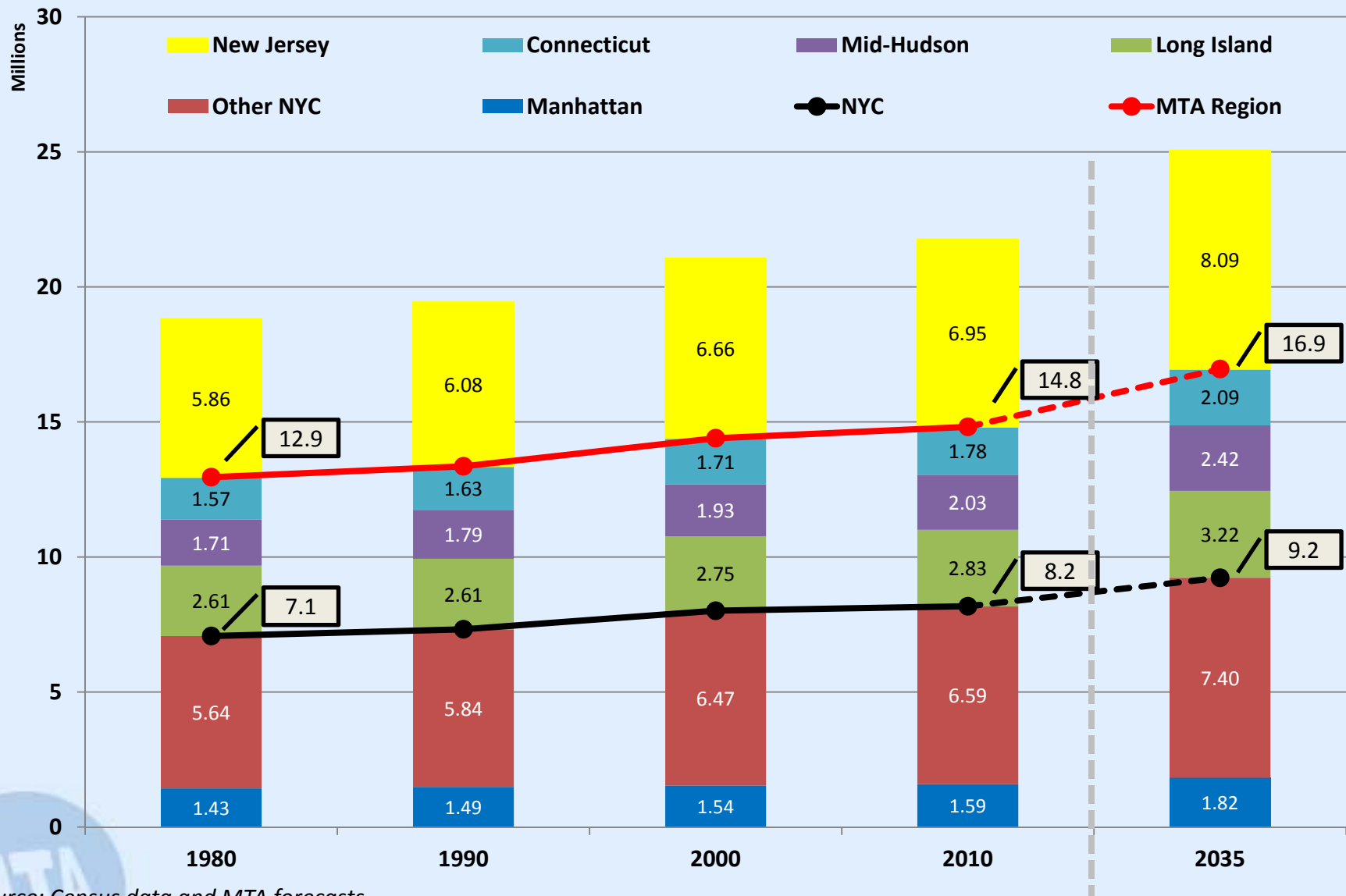


Key Factors Affecting Regional Travel Changes

- 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

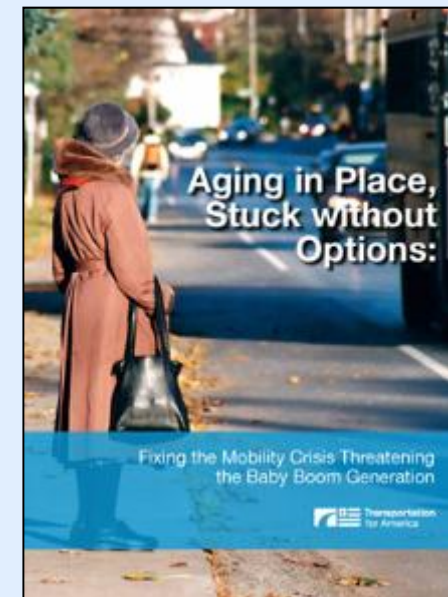
The Millennials (born after 1980)

- 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

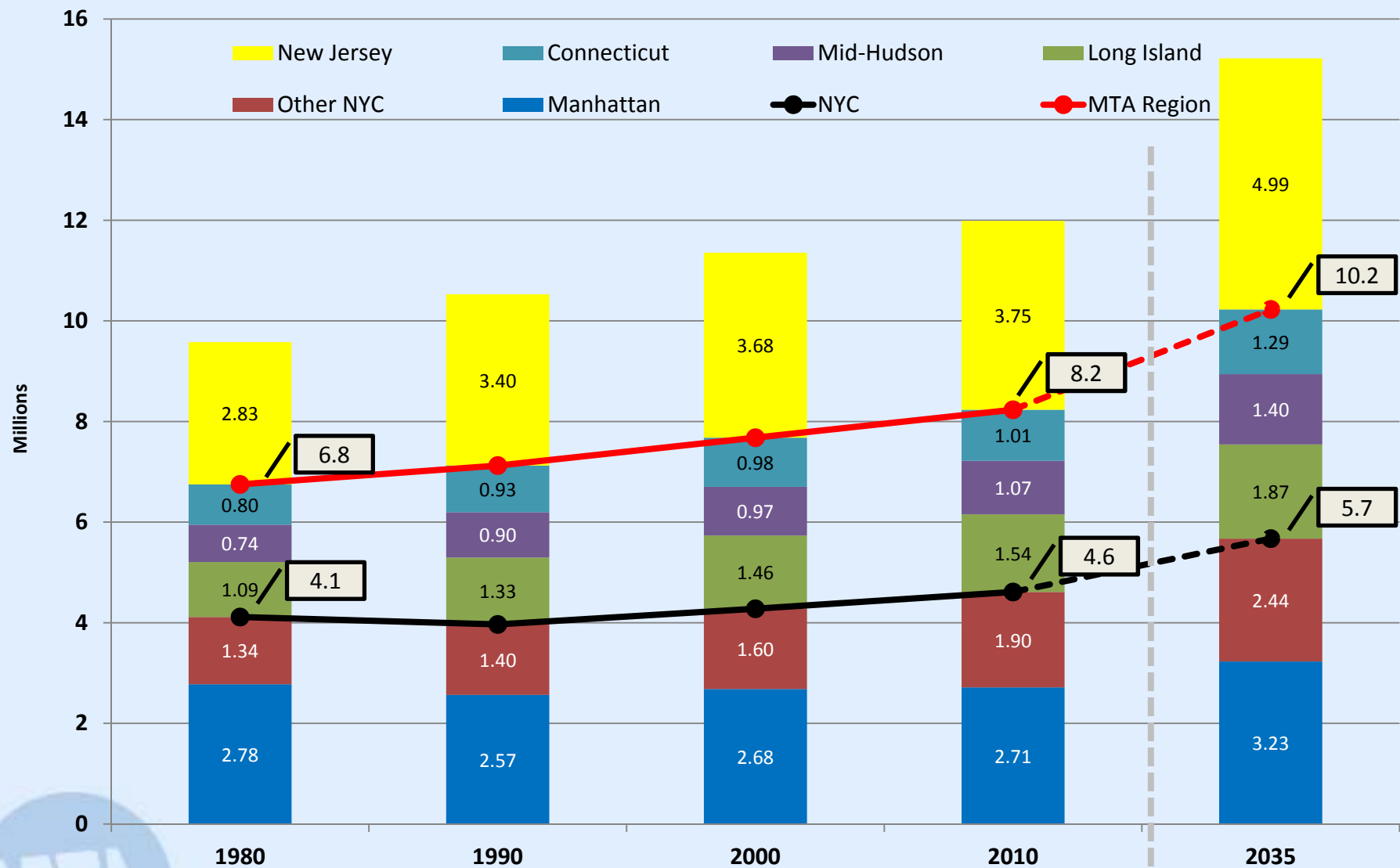


The Boomers (born 1946-1964)

- 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



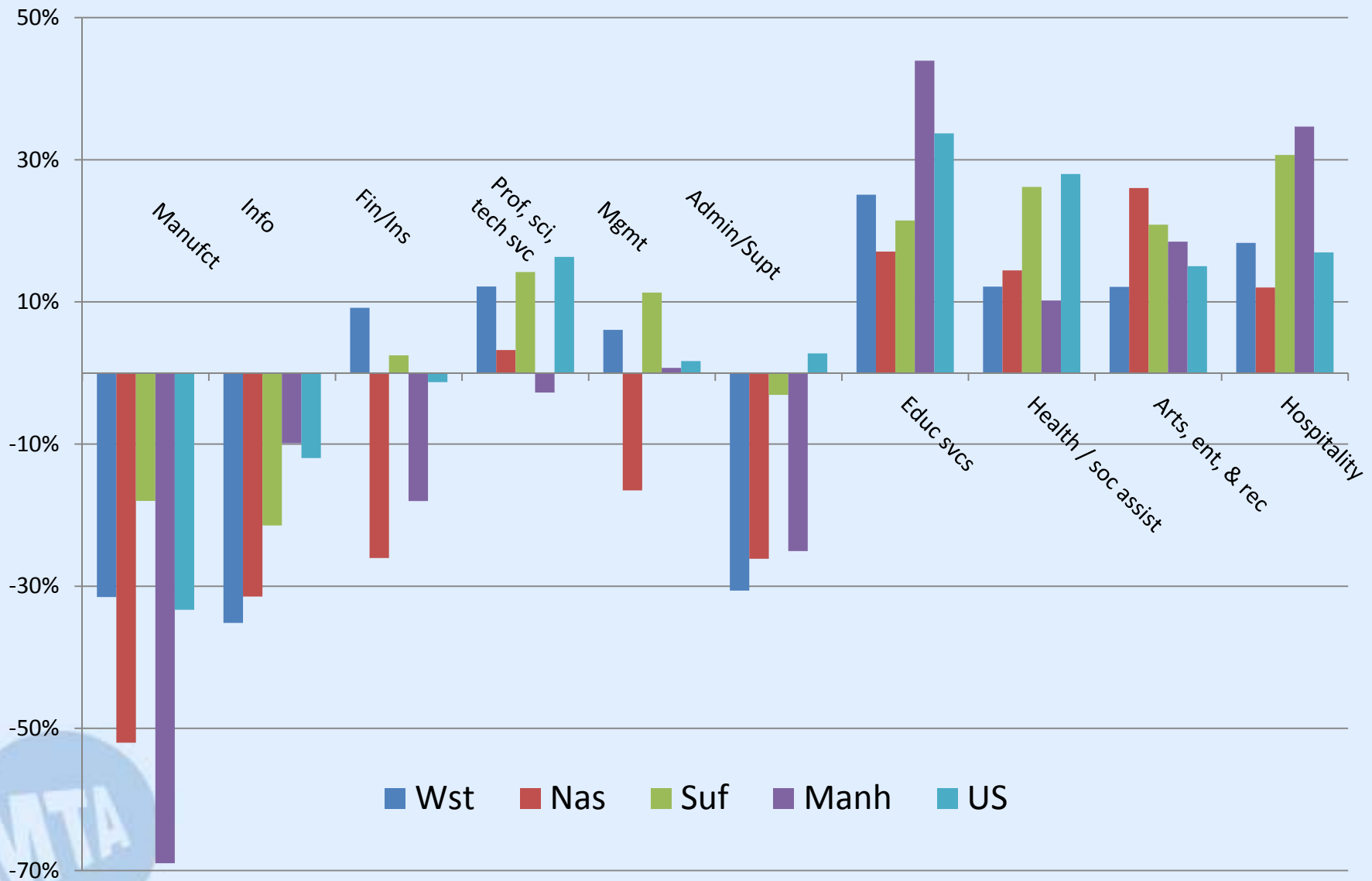
Continued Employment Growth in the Region



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

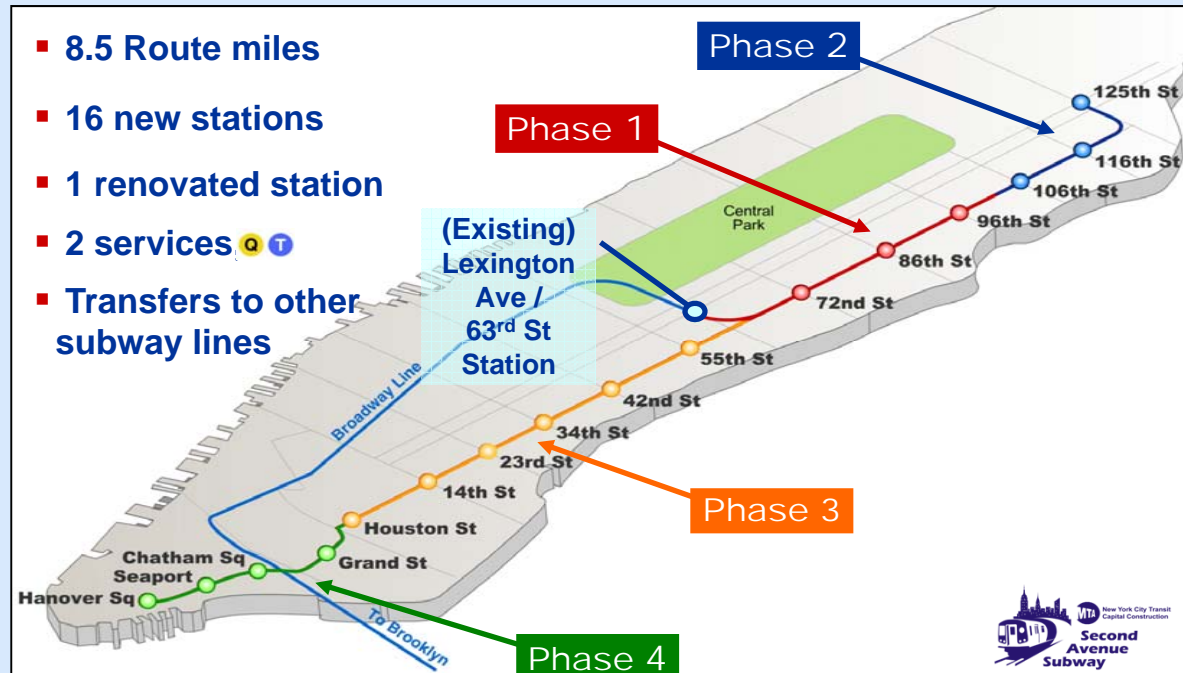
- Prevent capacity and reliability backslide, maintain SOGR/NR
- Complete projects addressing longstanding problems
 - Build full-length Second Avenue Subway
- Possible strategies to address current trends and support future growth:
 - Overcome subway capacity obstacles
 - Optimize the transit, commuter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



Complete Full-Length 2nd Ave Subway

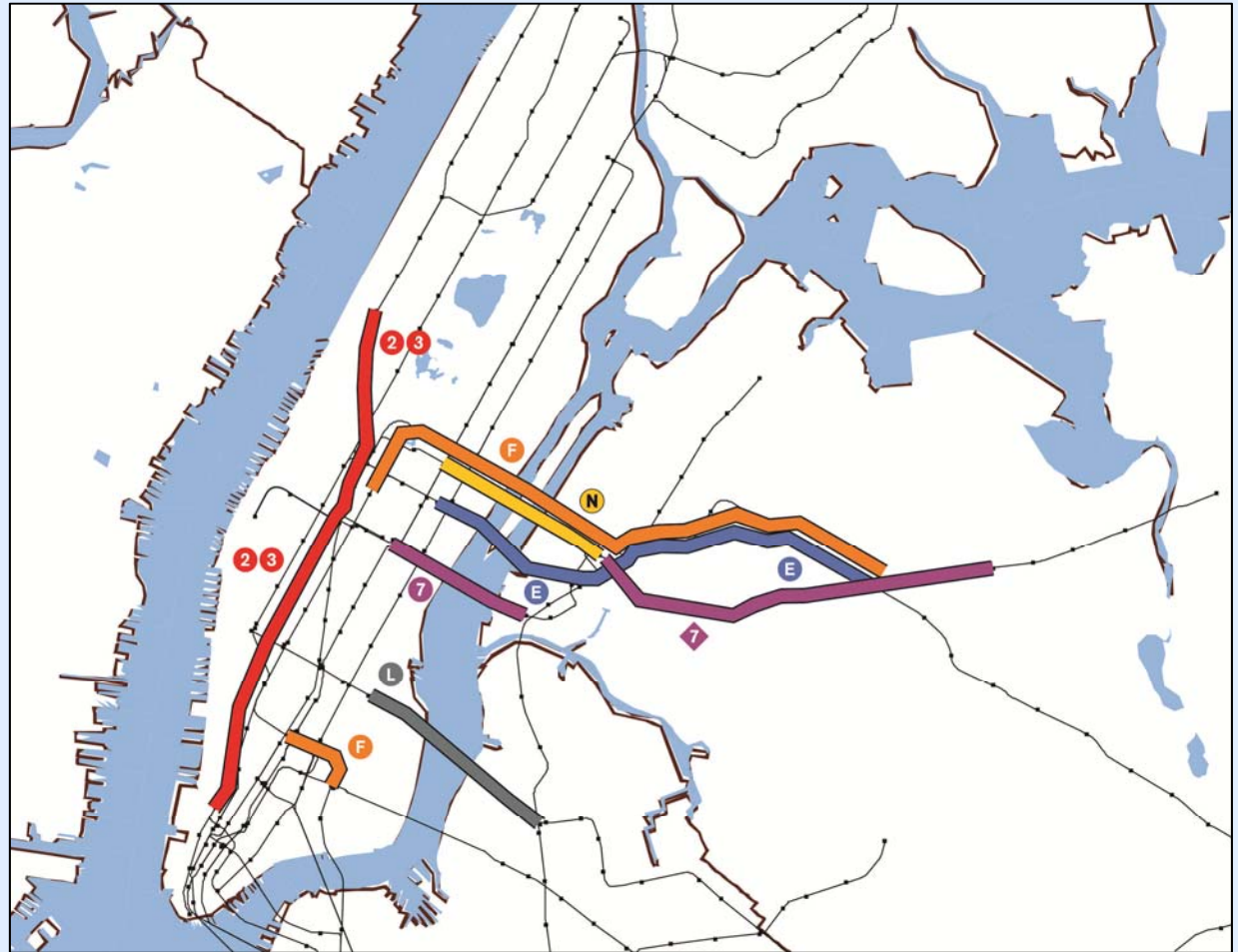
Addresses Longstanding Problems and Continued Growth

- 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.*



Overcome Subway Capacity Obstacles

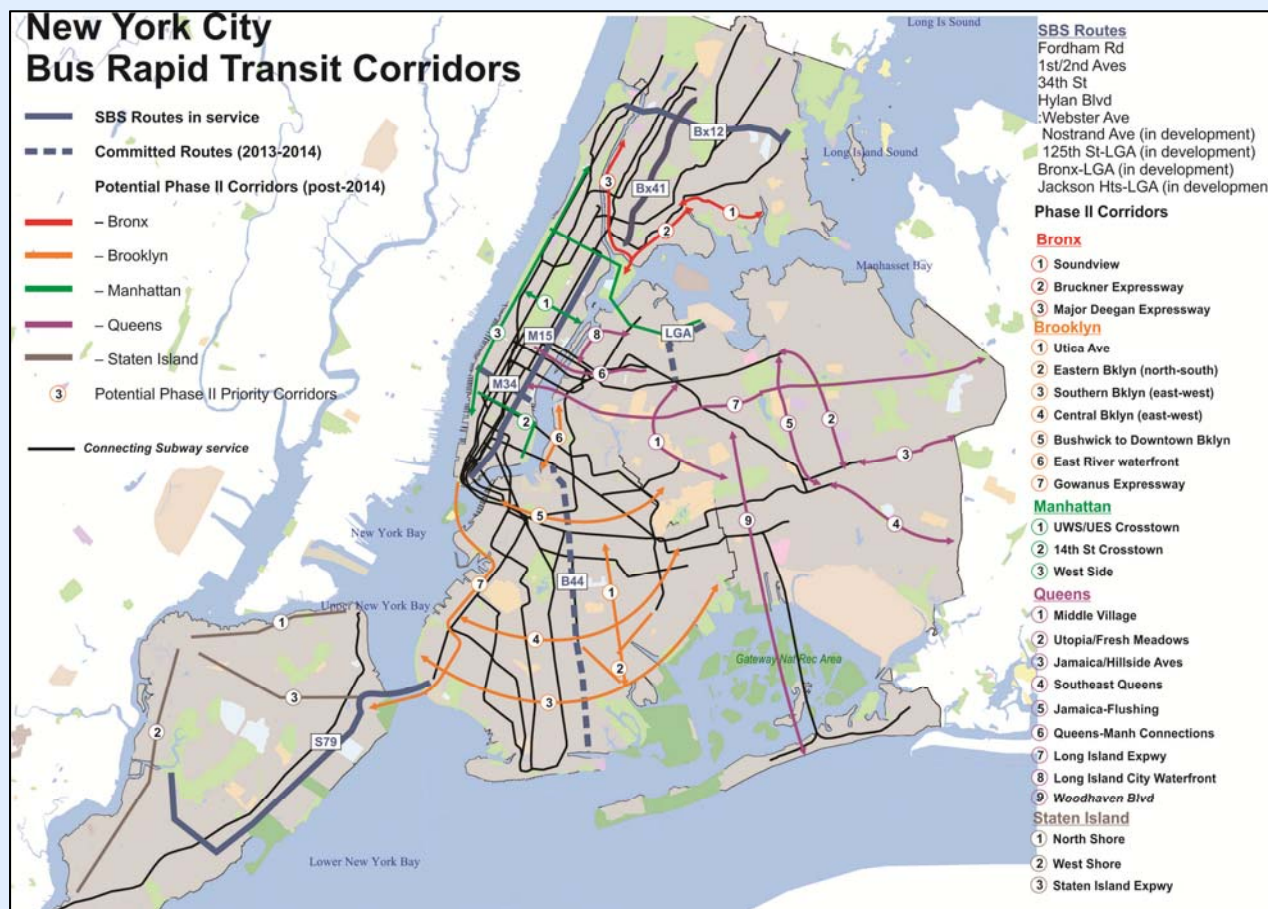
- Develop network improvements to address future congestion points, e.g.:
 - CBTC expansion
 - Nostrand Junction
 - Corridor capacity studies
- New entrances to address access at key stations



2035 Capacity Needs assuming committed network: ESA, full length SAS and 7-Line

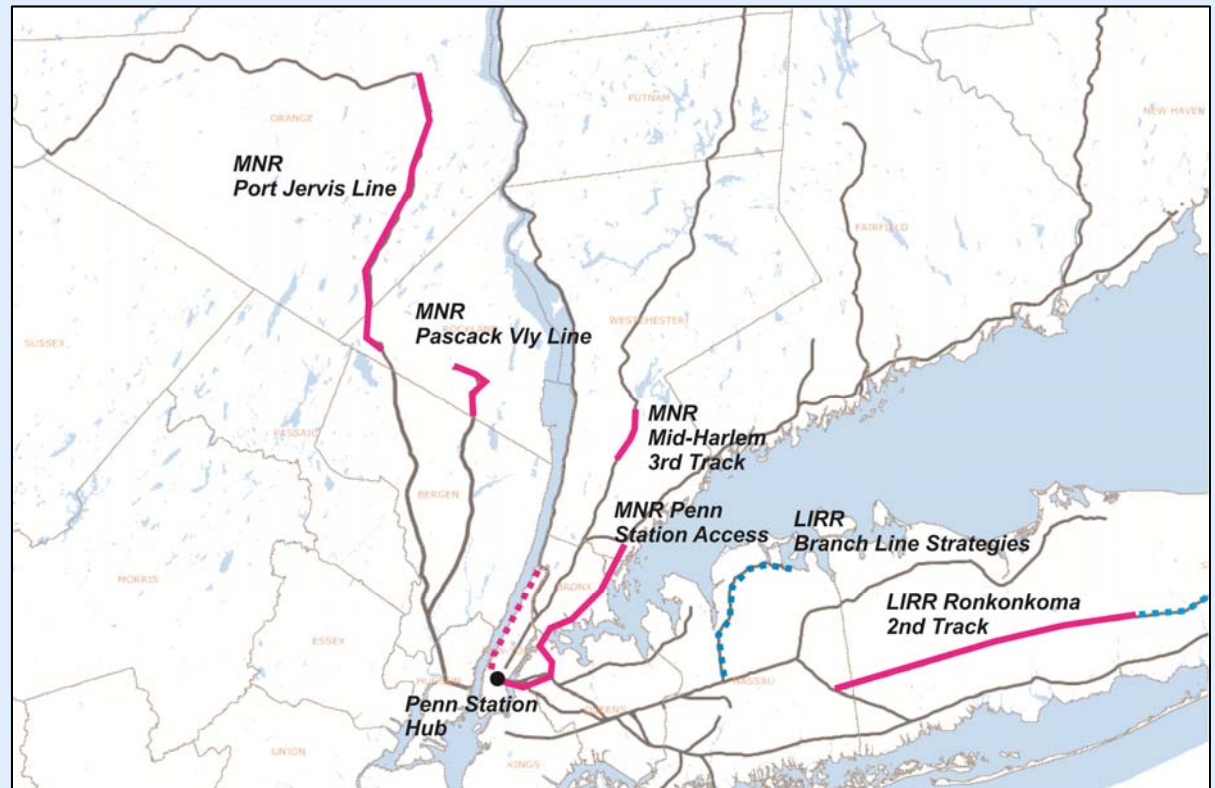
Optimize the Subway and Bus Network

- 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?



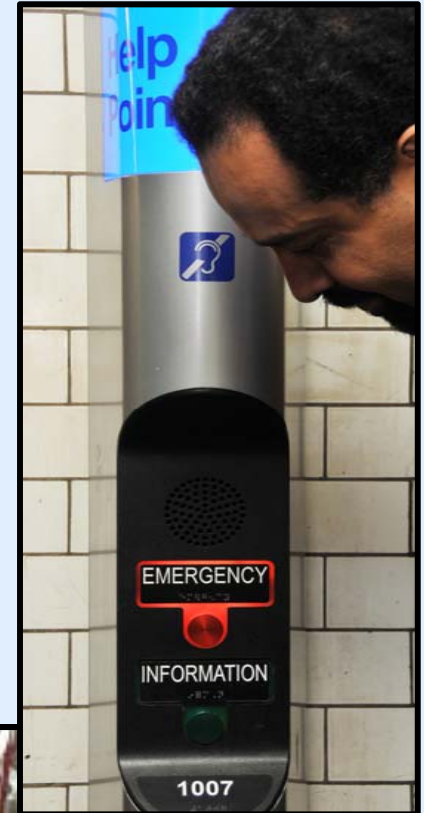
Optimize the Rail Network and Build New Markets

- 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



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NEW YORK

R train's Montague St. tunnel could close for Sandy fixes for 14 months

If the R train's Montague St. tunnel closes for more than a year to fix Superstorm Sandy damage, it will mean longer and more crowded commutes for riders who will have to make additional transfers and squeeze into already packed trains on other lines. Switch, signal and other equipment in the tunnel have been causing more problems than anywhere else in the system.



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

