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Objectives

• Explore new trends in development for office, retail and residential uses in urban areas

• Examine trends in changing development patterns and densities

• Review current response to these new trends related to transportation infrastructure

• Evaluate and plan for what our industry/community response should be to these new trends
Where Have We Been?

- Dense urban areas
- Exploration of the West
- Growth of the western cities
- Suburbanization
- Sprawl
- New Urbanism
Typically populated by newly arrived immigrants to the U.S.

- Horses
- Trains
- Trolleys
- Canals
- Ships
• Pioneers forming agriculturally focused communities
• Horses
• Wagons
• Trains
• The beginning of exploitation of vast resources including timber, minerals, agricultural production and other raw commodities.
Exploration of the West
• Commodity Hubs
• Support of Local Mercantile businesses
• Improved transportation and communications to the outposts
• Electrification
• Water resources development
Growth of the Western Cities
• Proliferation of single family homes
• Advent of the Auto
• Self Sufficient Communities with a central business district
• Phone (land line)
• “A chicken in every pot and a car in every garage”
• Development of Edge Cities
• Higher speed transit and commuter rail
• Reliance on the auto (multi auto households)
• Fax machines, FedEx, UPS, DHL, USPS next day
• Air Quality issues realized
New Urbanism

- Smart Growth, New Community Design, Neo-traditional design etc.
- Focus on multi-modal accessibility
- Sustainability/Environmental stewardship
- Home computers, internet, cell phones, cable and satellite communications
Where are we Headed?

- Demographic Changes
- Changes in Development Patterns
- Transportation Changes/Evolution
Demographic Changes

- Older population
- Young professionals
- Empty nesters
- Solopenures
- Cultural Diversity
- Demand for Modal Choices
Changes in Development Patterns

- Re-Densification
- Livable Centers
- Mixed Uses
- Refocus on Transit
- Walk able, bike able communities
- Megalopolis
Relocate to Areas with Excellent Public Transportation
Transportation Changes / Evolution

- Transportation Demand Management (TDM)
- Transportation Systems Management (TSM)
- Parking Management
- Transit Oriented Development (TOD)
- Vehicle Technology
- Transit Advancements
What Do We Face as an Industry?

- Denser Urban Environments
- Different Work Environments
- Different Retail Experiences
- Changes in Transportation
• Lower auto ownership
• Higher Transit ridership
• Mixed Uses for live/work/play environments
• More multi-modal opportunities
• Escapees from the city
Vehicle-Miles Traveled Per Capita
Willingness to Give Up Auto Ownership as Cost Not Justified by Usage

SOURCE: RCLCO Consumer Research
Denser Urban Environments
• Satellite Offices
• Work Form Home
• Virtual Offices
• Shared work spaces
• Community work spaces (collaboration spaces)
Different Retail Experiences

- Big – Boxalypse
- Corner stores and support retail
- Show rooms
- On line shopping
- Front door delivery
• Multi-modalism
• Multi-modal hubs
• Proliferation of transit in different forms/technologies
• Transportation Systems Evolution (complete streets, super streets)
• Commuter/high speed rail
• Take advantage of technology and implement TDM and TSM techniques across all modes

• Emphasize Shared use Facilities (roads, sidewalks, parking)

• Take advantage of transit oriented development and become more multi-modal in approach to solutions

• Recognize needs of different users and respond appropriately in providing transportation solutions
Gasoline Sales Versus Price Per Gallon

U.S. Total Gasoline Sales Versus Price Per Gallon

Sales data to September 15, 2012
Price data to November 15, 2012

Source: Energy Information Administration
*US Regular All Formulations Gas Price

Price per Gallon

x1000 Gallons per Day

Estimated Vehicle Miles Driven and Gasoline Prices

Population adjusted using the BLS Civilian Noninstitutional Population Age 16 and Over [FRED CNP16OV] Chained to the Jan 1971 population

Miles Driven Through September 2012
Gasoline Price Through November 2012

Estimated Vehicle Miles Driven and Gasoline Prices
Estimated Vehicle Miles Driven on All Roads

- Data Through September 2012
- Population-Adjusted Cumulative Growth
- Current Level

- Jan 1971
- Apr 1998
- Jun 2005

55 months total, 21 months to 5.0% trough

Latest down 7.32% from peak 87 months later

Population adjusted using the BEA Mid-month population estimates [FRED POPTHM]
Chained to the Jan 1971 population

Campaign

Created by dshort.com
November 2012
Estimated Vehicle Miles Driven on All Roads
Monthly Unemployment Rate and the Employment-Population Ratio Age 16 and Over

Data through November

Mar 1951 58.1%
Dec 1977
58.7%
7.7%
Estimated Vehicle Miles Driven on All Roads

Data Through September 2012

Population adjusted using the BLS Civilian Noninstitutional Population Age 16 and Over [PRED CNP16OV] Chained to the Jan 1971 population

Latest down 8.80% from peak 87 months later

Estimated Vehicle Miles Driven on All Roads