BACKGROUND MATERIAL:

System Performance Working Group Report

Northeastern Illinois Transit Task Force

January 27, 2014

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The information in this package is included to illustrate a number of the key points in the System Performance Working Group January 27 report to the Northeastern Illinois Public Transit Task Force.

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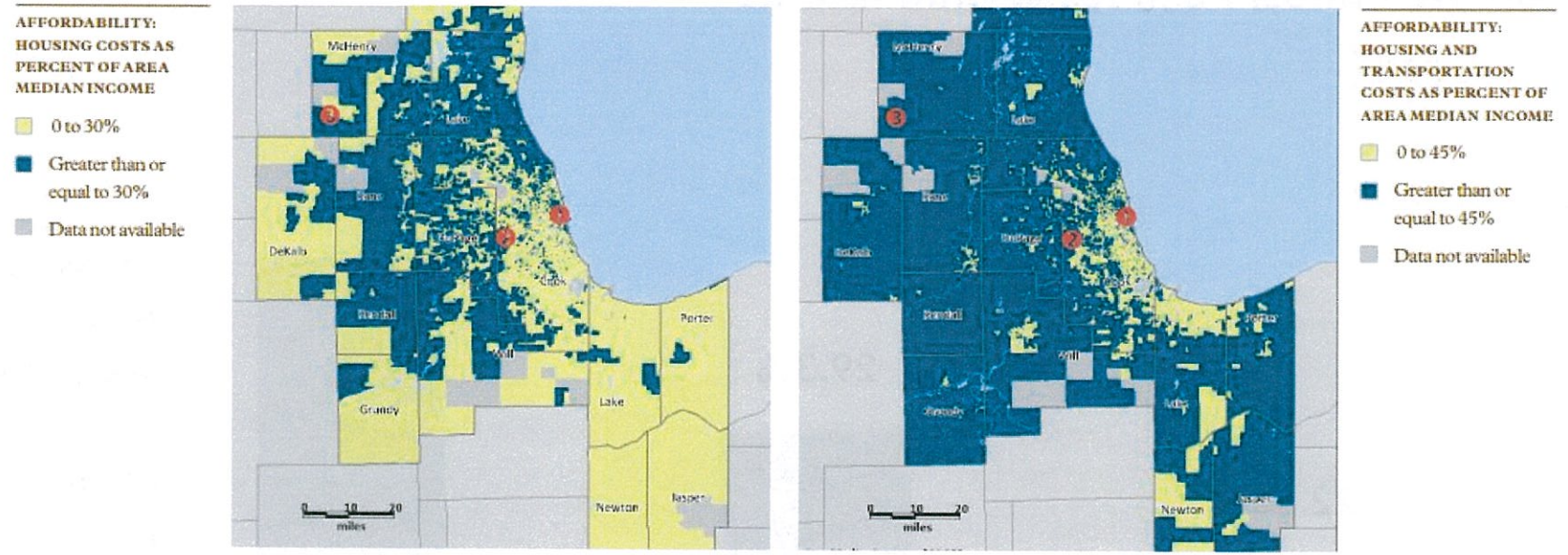
Transit Lowers Transportation Costs for Households in the Chicago Region



Neighborhood	Housing Costs	Transportation Costs	H+T Costs
❶ **Montrose CTA station in Ravenswood neighborhood**	28.09%	14.94%	43.04%
❷ **Brookfield Metra station in Brookfield**	27.67%	21.97%	49.64%
❸ **State and Rte. 176 in Marengo**	27.40%	26.36%	53.76%

Neighborhood Average	Ravenswood	Brookfield	Marengo
Autos per Household	1.09	1.74	1.99
Household VMT	12,150	16,980	24,438
Commuters Using Transit	42.32%	7.30%	0.98%
Residential Density	22.43 HH/Res. Acre	6.01 HH/Res. Acre	3.22 HH/Res. Acre
Monthly Transportation Costs	$751	$1,104	$1,324

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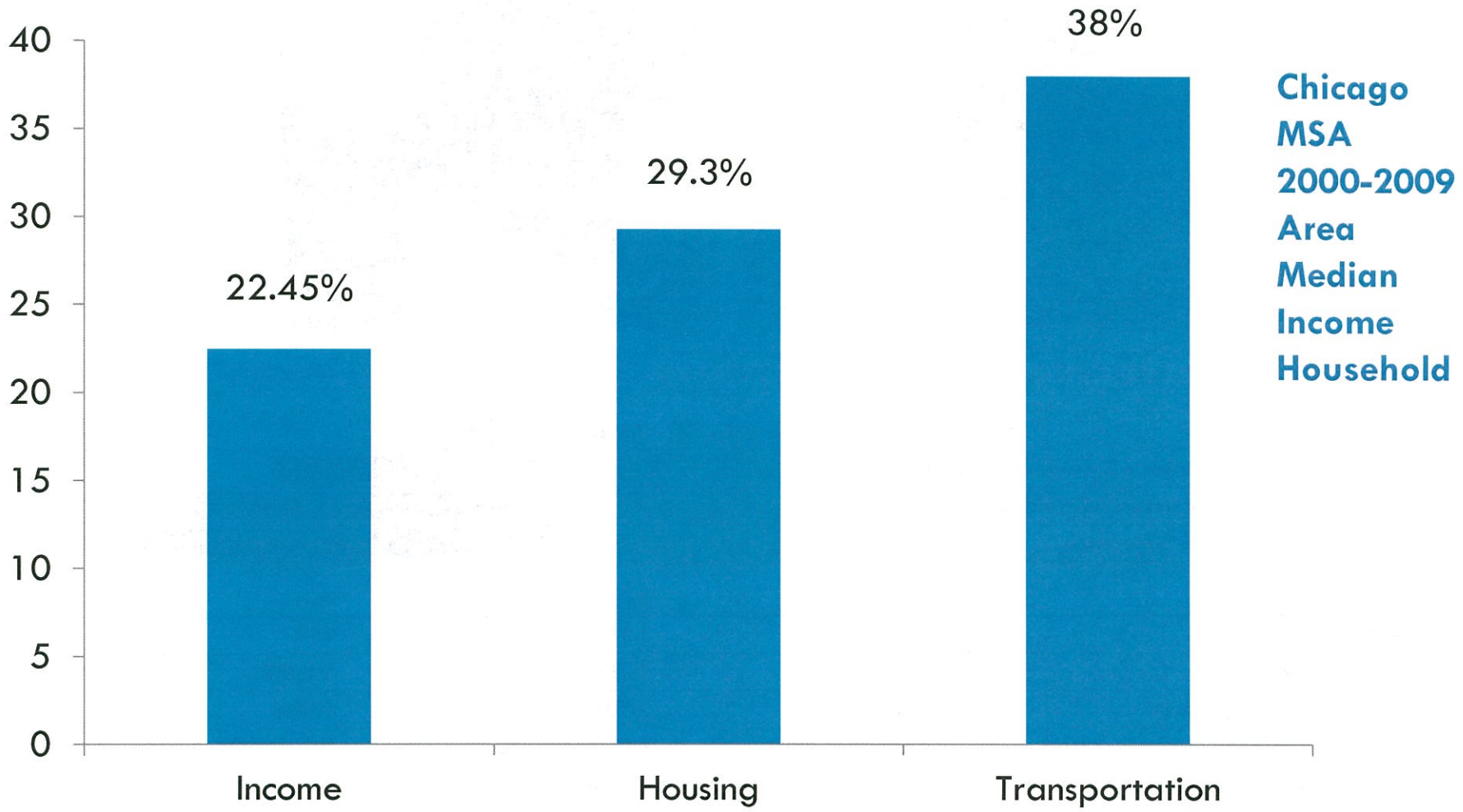
Source: H+T Affordability Index, Center for Neighborhood Technology

Between 2000 and 2009, the typical regional household transportation cost rose almost 70% faster than income



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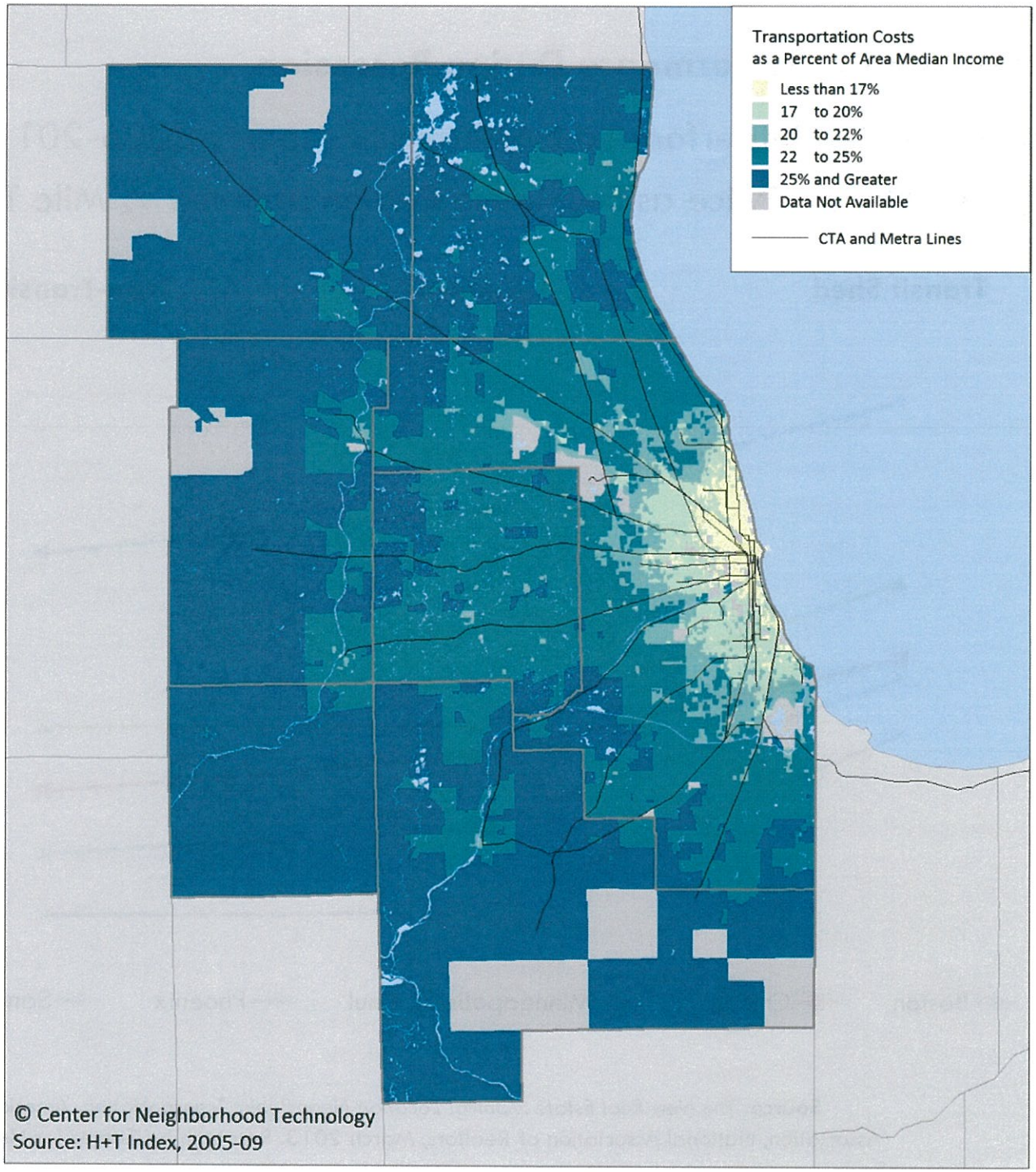
Source: H+T Affordability Index, Center for Neighborhood Technology


Transportation Costs
as a Percent of Area Median Income
Less than 17%
17 to 20%
20 to 22%
22 to 25%
25% and Greater
Data Not Available
CTA and Metra Lines
© Center for Neighborhood Technology
Source: H+T Index, 2005-09

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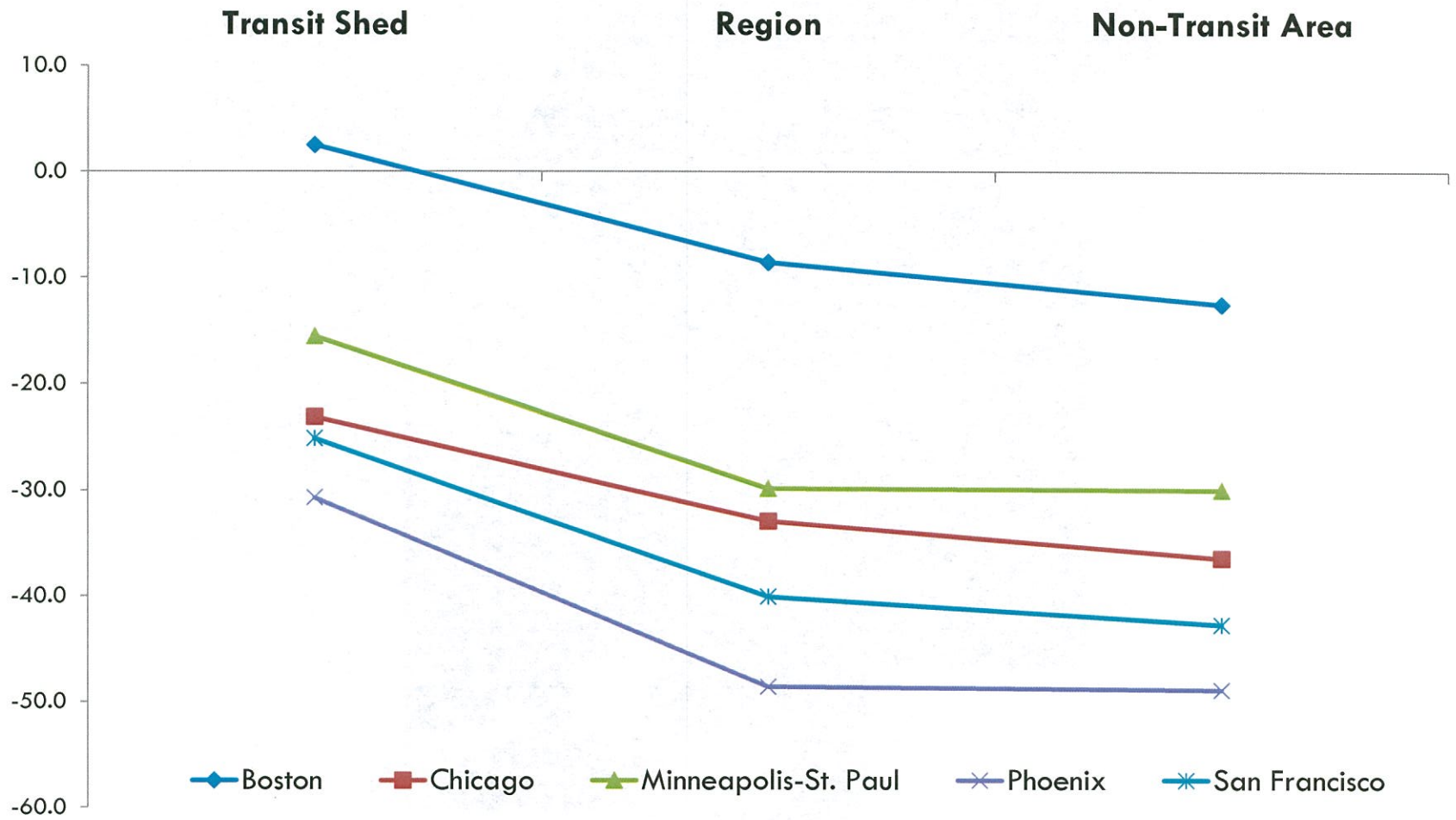
Transit Zone Property Performance During Recession

Transit Zone Property Outperformed Non-Transit Property 2006-2011

Values Dropped Nearly Twice as Fast in the Region as in the ½ Mile Transit Shed



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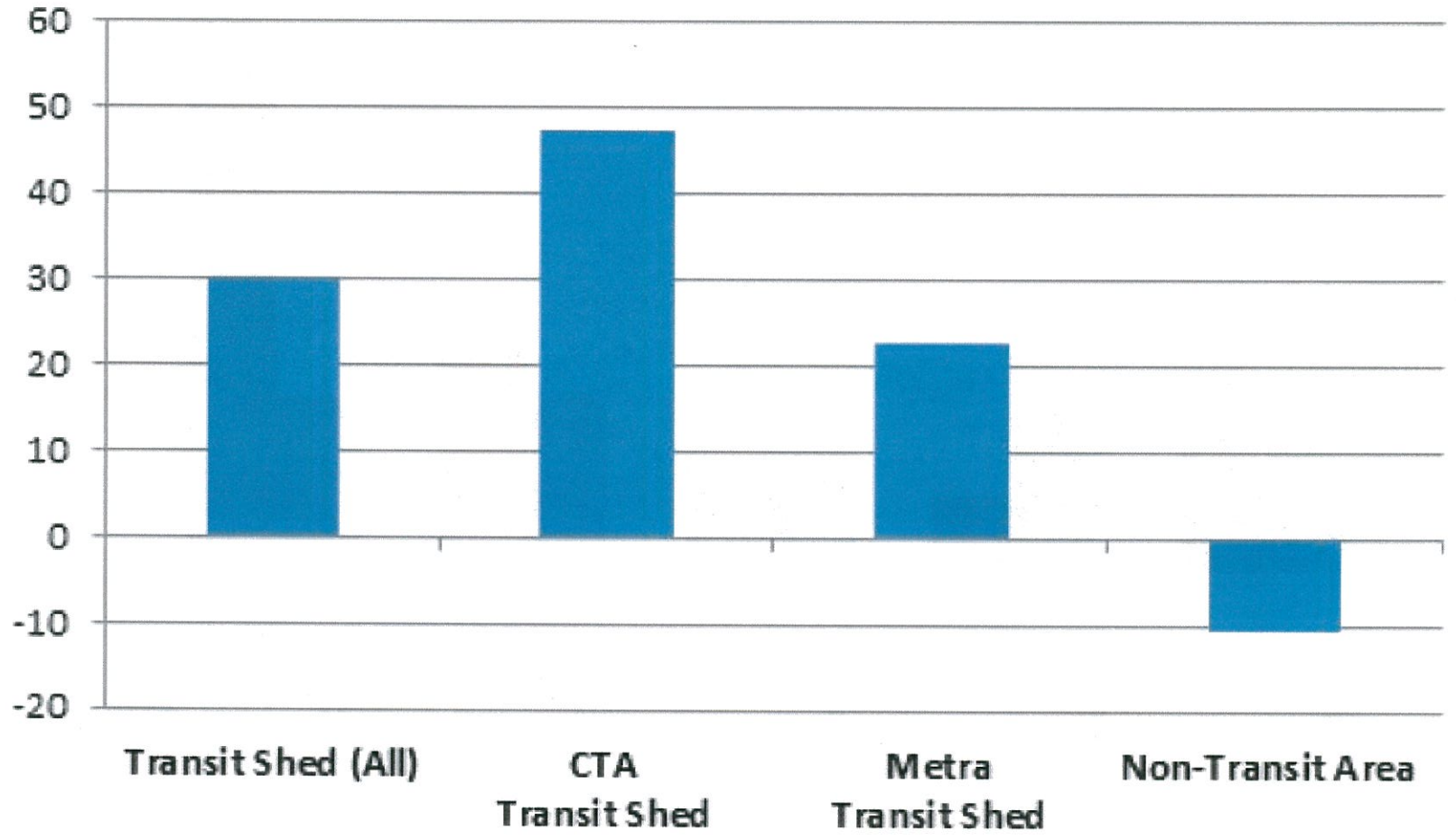
Source: *The New Real Estate Mantra: Location Near Public Transportation.* American Public Transportation Association, National Association of Realtors, March 2013. Research by Center for Neighborhood Technology.

Chicago Transit Zone Property Performance

Percent change (relative to the region) in average residential sales prices in Chicago, 2006-11



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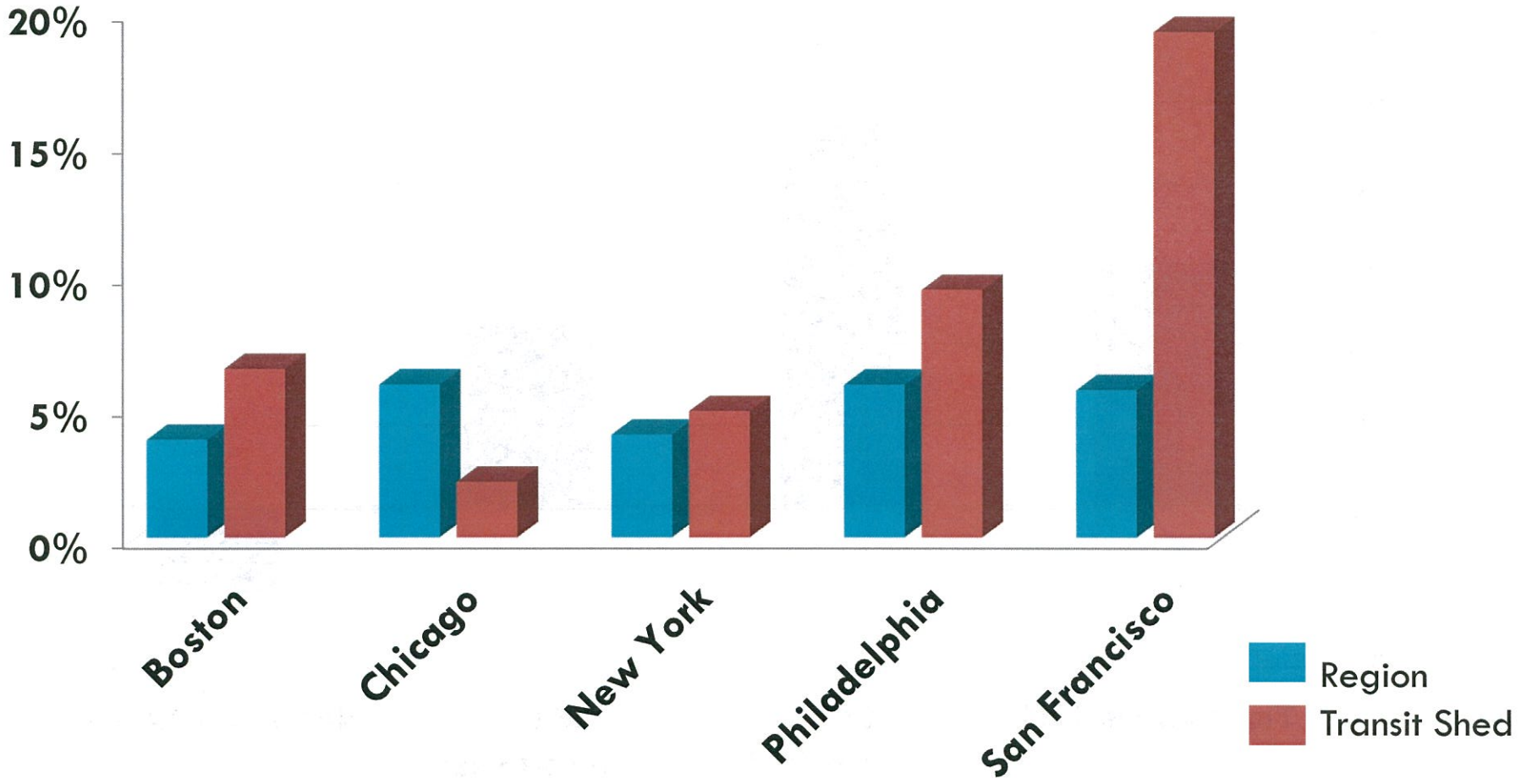
Source: *The New Real Estate Mantra: Location Near Public Transportation.* American Public Transportation Association, National Association of Realtors, March 2013. Research by Center for Neighborhood Technology.

Chicago Underperforming in Growth Linked to Transit

Percent change total households, 2000-10



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Source: *Transit Oriented Development in the Chicago Region: Efficient and Resilient Communities for the 21st Century*, Center for Neighborhood Technology, 2013.

Chicago region did not rank in top 20 for commercial/ multifamily in ULI/Price Waterhouse Coopers 2014 Report

Development market increasingly favoring mixed use and transit-oriented development

EXHIBIT 3-1

Investment Prospects for Commercial/Multifamily Properties by Market

generally good | fair | generally poor

1	Washington, D.C.	6.93
2	Austin	6.92
3	San Francisco	6.92
4	New York City	6.85
5	Boston	6.60
6	Seattle	6.60
7	San Jose	6.53
8	Houston	6.46
9	Los Angeles	6.30
10	San Diego	6.17
11	Denver	6.16
12	Dallas/Fort Worth	6.10
13	Northern New Jersey	6.10
14	Orange County, CA	6.01
15	Raleigh/Durham	5.96
16	San Antonio	5.83
17	Miami	5.81
18	Portland, OR	5.81
19	Westchester, NY/Fairfield, CT	5.74
20	Charlotte	5.58
21	Chicago	5.57
22	Honolulu/Hawaii	5.47
23	Phoenix	5.45
24	Philadelphia	5.44
25	Baltimore	5.44
26	Minneapolis/St. Paul	5.38
27	Nashville	5.32
28	Inland Empire, CA	5.30
29	Orlando	5.19
30	Salt Lake City	5.17
31	Pittsburgh	5.16
32	Virginia Beach/Norfolk	4.93
33	Tampa/St. Petersburg	4.79
34	Indianapolis	4.76
35	Kansas City	4.73
36	Atlanta	4.65
37	Oklahoma City	4.61
38	New Orleans	4.54
39	St. Louis	4.48
40	Jacksonville	4.48
41	Albuquerque	4.43
42	Milwaukee	4.33
43	Memphis	4.22
44	Tucson	4.21
45	Providence	4.20
46	Sacramento	4.20
47	Columbus	4.03
48	Cincinnati	3.97
49	Las Vegas	3.91
50	Cleveland	3.48
51	Detroit	2.88

Source: *Emerging Trends in Real Estate 2012* survey.

EXHIBIT 3-2

Development Prospects for Commercial/Multifamily Properties by Market

generally good | fair | generally poor

1	Washington, D.C.	6.41
2	New York City	6.16
3	San Francisco	6.16
4	Austin	6.04
5	San Jose	5.86
6	Houston	5.81
7	Seattle	5.81
8	Boston	5.68
9	Dallas/Fort Worth	5.42
10	Los Angeles	5.27
11	Denver	5.23
12	Westchester, NY/Fairfield, CT	5.19
13	San Diego	5.18
14	San Antonio	5.09
15	Raleigh/Durham	5.07
16	Northern New Jersey	5.01
17	Orange County, CA	4.92
18	Nashville	4.91
19	Portland, OR	4.87
20	Salt Lake City	4.71
21	Charlotte	4.66
22	Baltimore	4.54
23	Minneapolis/St. Paul	4.54
24	Honolulu/Hawaii	4.39
25	Chicago	4.31
26	Miami	4.22
27	Inland Empire, CA	4.22
28	Philadelphia	4.21
29	Pittsburgh	4.15
30	Orlando	4.08
31	Virginia Beach/Norfolk	4.04
32	Oklahoma City	3.92
33	Indianapolis	3.91
34	Albuquerque	3.90
35	Tampa/St. Petersburg	3.86
36	Kansas City	3.80
37	New Orleans	3.65
38	Milwaukee	3.62
39	Memphis	3.58
40	Providence	3.49
41	Jacksonville	3.48
42	Tucson	3.40
43	Phoenix	3.39
44	St. Louis	3.31
45	Atlanta	3.30
46	Columbus	3.26
47	Cincinnati	3.20
48	Sacramento	3.08
49	Cleveland	2.77
50	Las Vegas	2.48
51	Detroit	2.26

Source: *Emerging Trends in Real Estate 2012* survey.

EXHIBIT 3-3

For-Sale Homebuilding Prospects

generally good | fair | generally poor

1	Washington, D.C.	5.99
2	Austin	5.76
3	New York City	5.51
4	San Francisco	5.40
5	Houston	5.31
6	San Jose	5.27
7	Seattle	5.21
8	Dallas/Fort Worth	5.19
9	San Antonio	5.14
10	Boston	5.05
11	Westchester, NY/Fairfield, CT	4.91
12	Northern New Jersey	4.68
13	San Diego	4.64
14	Orange County, CA	4.58
15	Raleigh/Durham	4.54
16	Denver	4.51
17	Los Angeles	4.50
18	Portland, OR	4.41
19	Salt Lake City	4.37
20	Nashville	4.29
21	Honolulu/Hawaii	4.29
22	Baltimore	3.99
23	Philadelphia	3.96
24	Charlotte	3.92
25	Orlando	3.87
26	Minneapolis/St. Paul	3.87
27	Oklahoma City	3.86
28	Chicago	3.75
29	Miami	3.75
30	Pittsburgh	3.72
31	Virginia Beach/Norfolk	3.61
32	Indianapolis	3.53
33	Kansas City	3.49
34	Providence	3.37
35	Milwaukee	3.35
36	Inland Empire, CA	3.35
37	Jacksonville	3.34
38	Memphis	3.32
39	St. Louis	3.27
40	Tampa/St. Petersburg	3.26
41	Albuquerque	3.24
42	Tucson	3.19
43	New Orleans	3.17
44	Phoenix	3.03
45	Cincinnati	3.00
46	Columbus	2.94
47	Atlanta	2.93
48	Sacramento	2.69
49	Cleveland	2.46
50	Las Vegas	2.37
51	Detroit	2.02

Source: *Emerging Trends in Real Estate 2012* survey.

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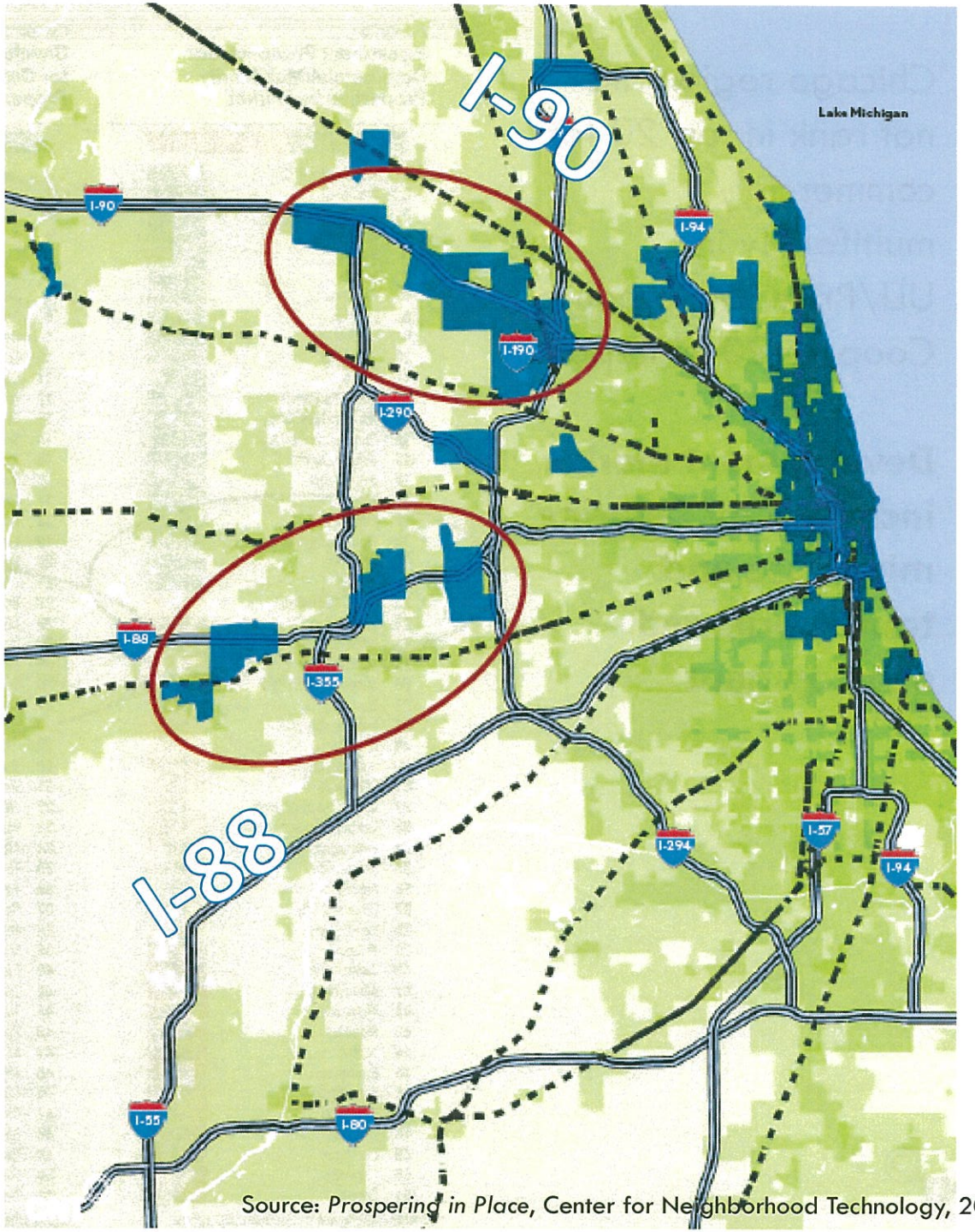
Employment-Oriented Transit

Four of top five job centers (270,000 jobs) lack significant transit service:

- O'Hare/NW Suburbs
- Oak Brook
- Lombard
- Naperville



Source: *Prospering in Place*, Center for Neighborhood Technology, 2012

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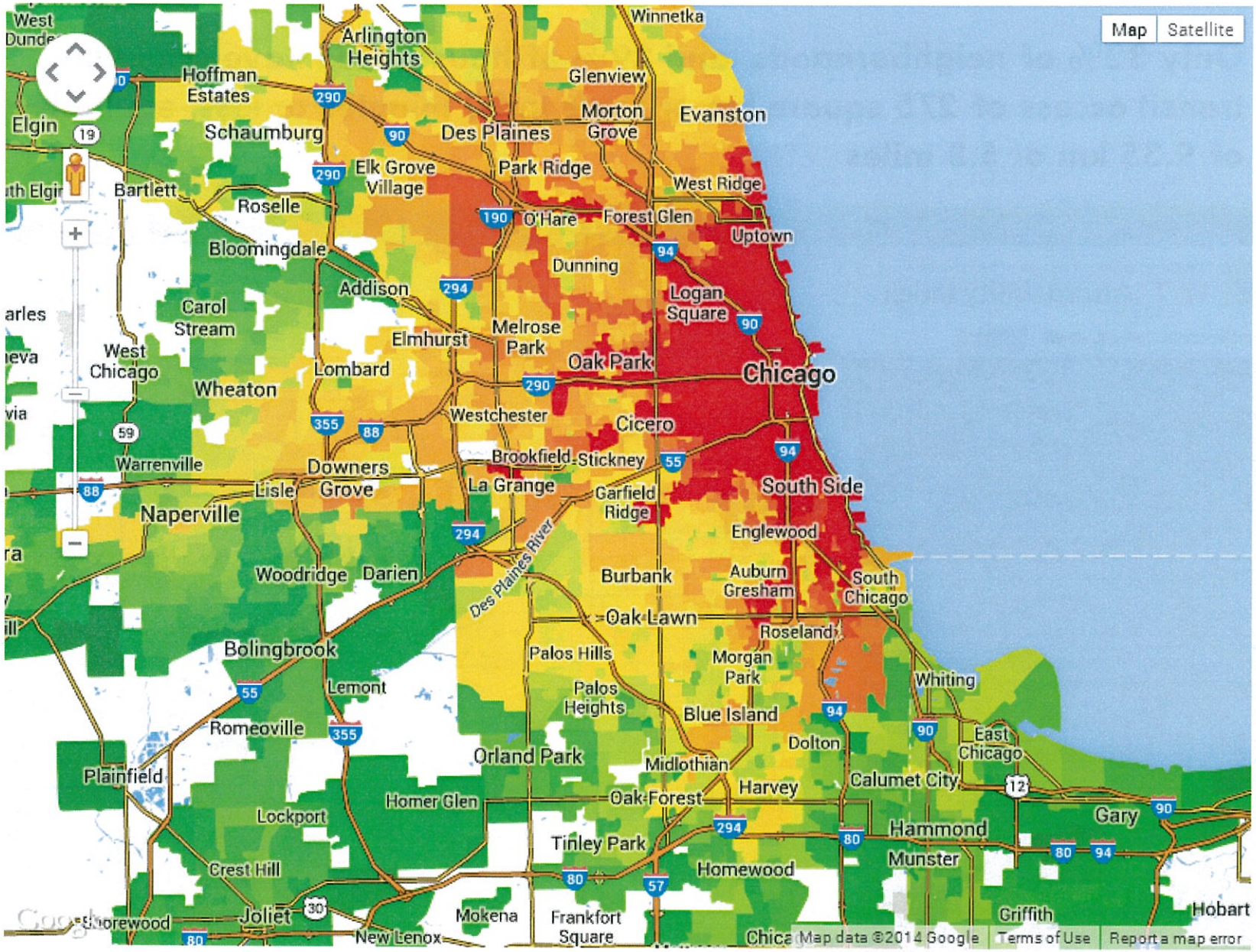

Jobs within TAS: Jobs Accessible within a 30 Minute Transit Trip

0 — 500,000

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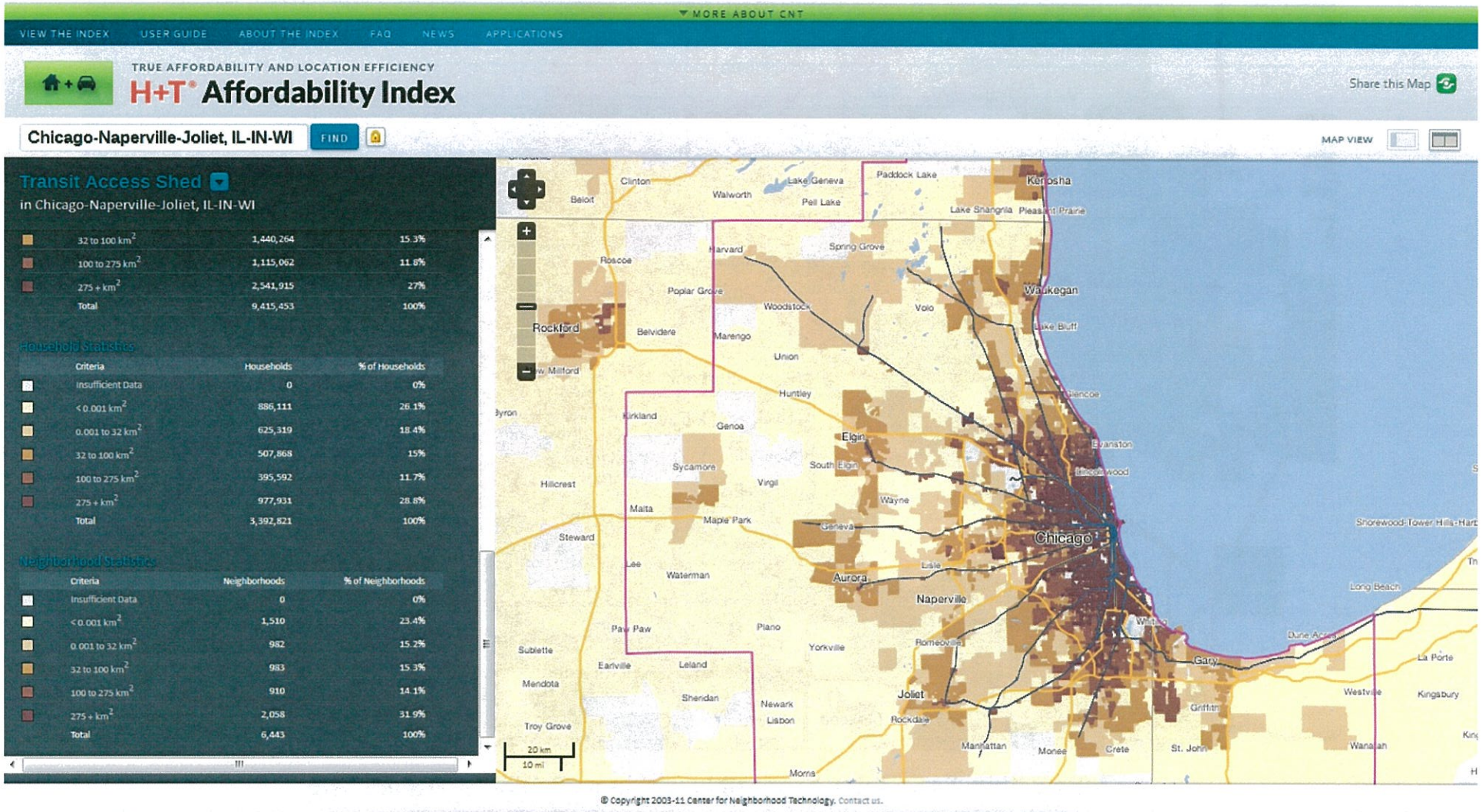
Source: CNT analysis of transit data for Chicago region

Only 32% of neighborhoods and 29% of households have scheduled transit access of 275 square km or more in 30 minutes or less, equivalent of 9.35 km or 5.8 miles



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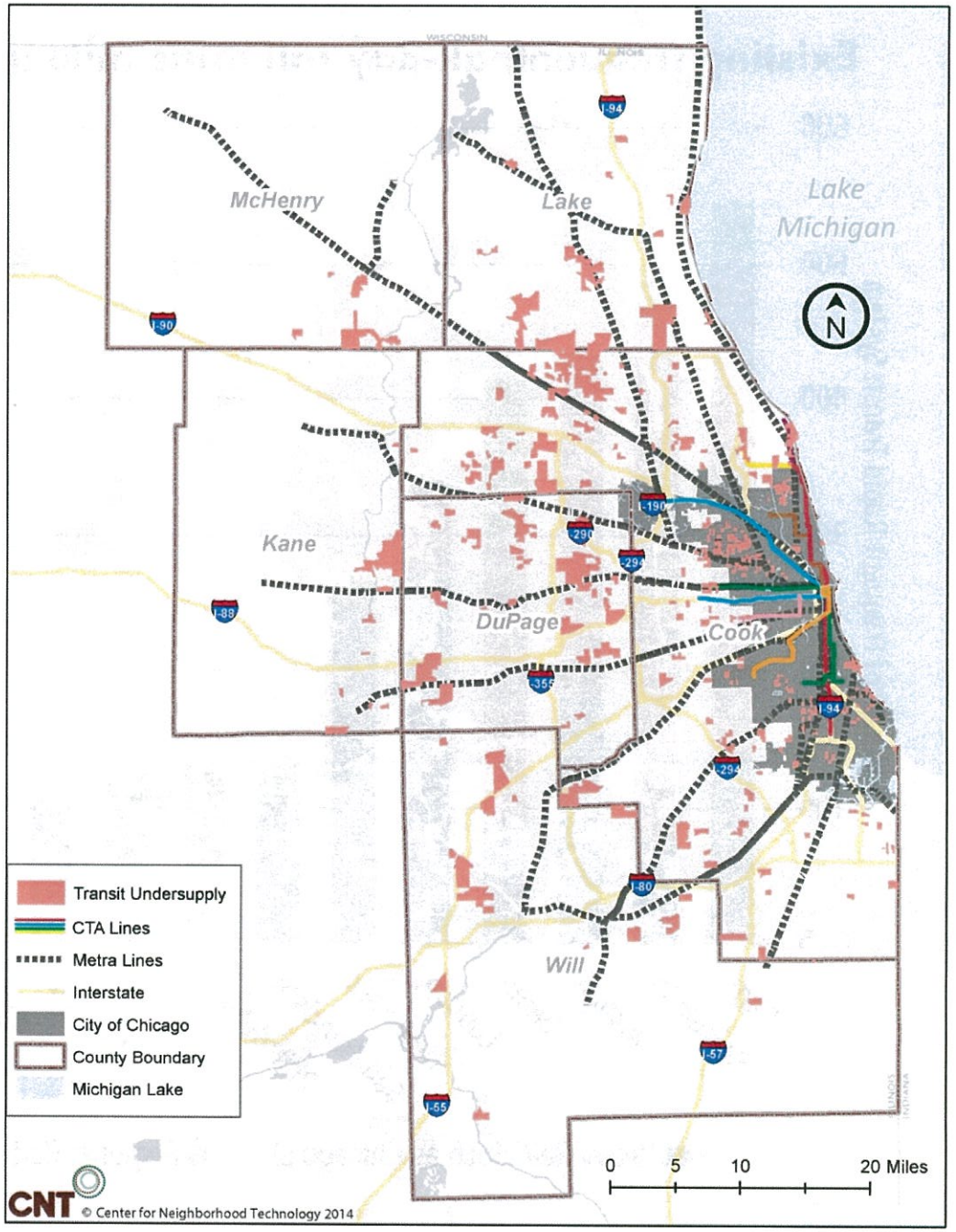
Source: H+T Affordability Index, Center for Neighborhood Technology

Areas Most in Need Of More Transit

This map compares transit demand and transit supply to identify those census block groups, throughout the region, whose demand for transit most exceeds the current supply of transit they are receiving.

The 20% of block groups with the greatest transit undersupply are shown in red.



Data Sources: ACS Five Year Data, LEHD, GTFS, CMAP Travel Model 2010

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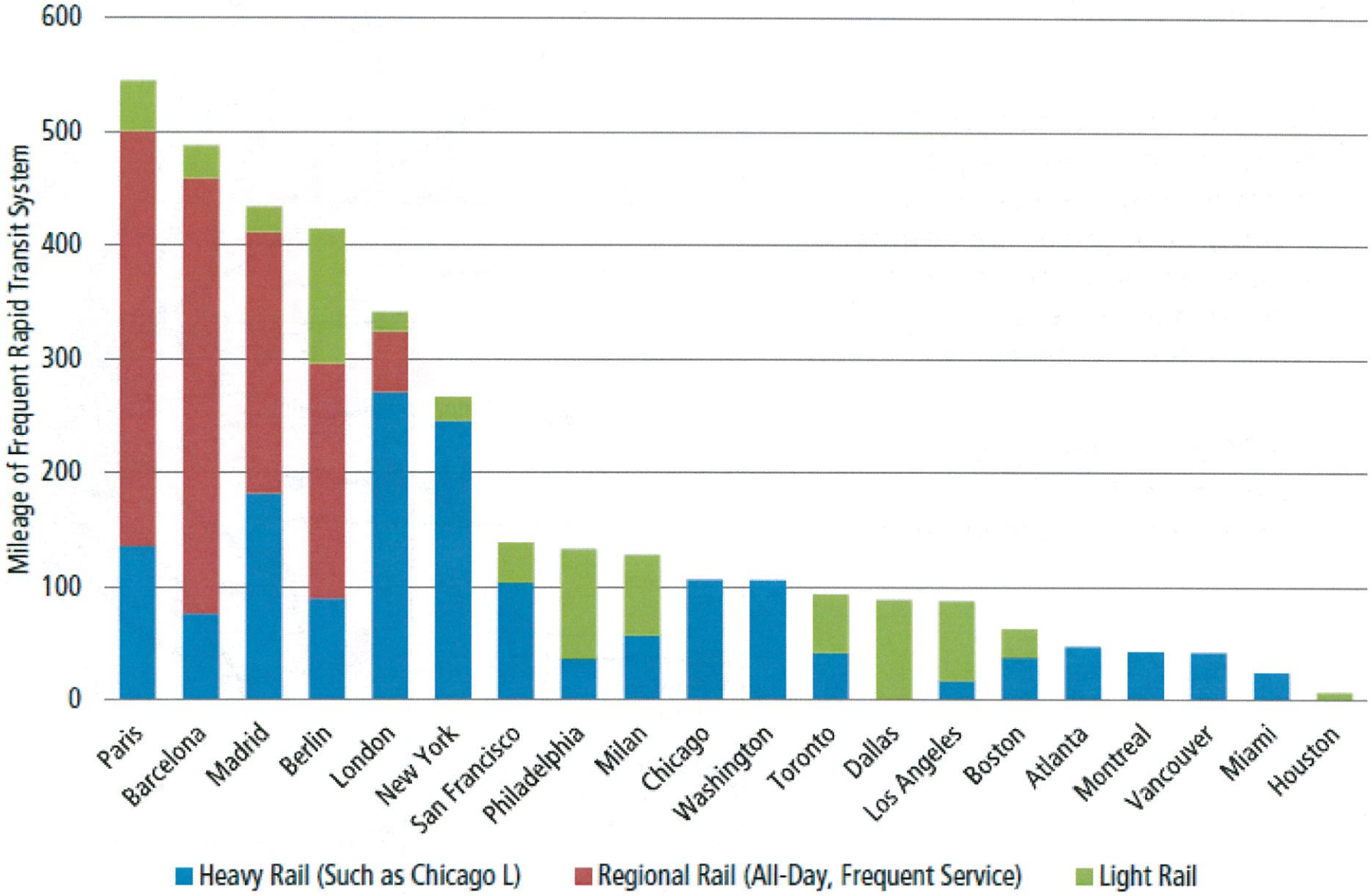
Existing frequent, all-day rail route mileage



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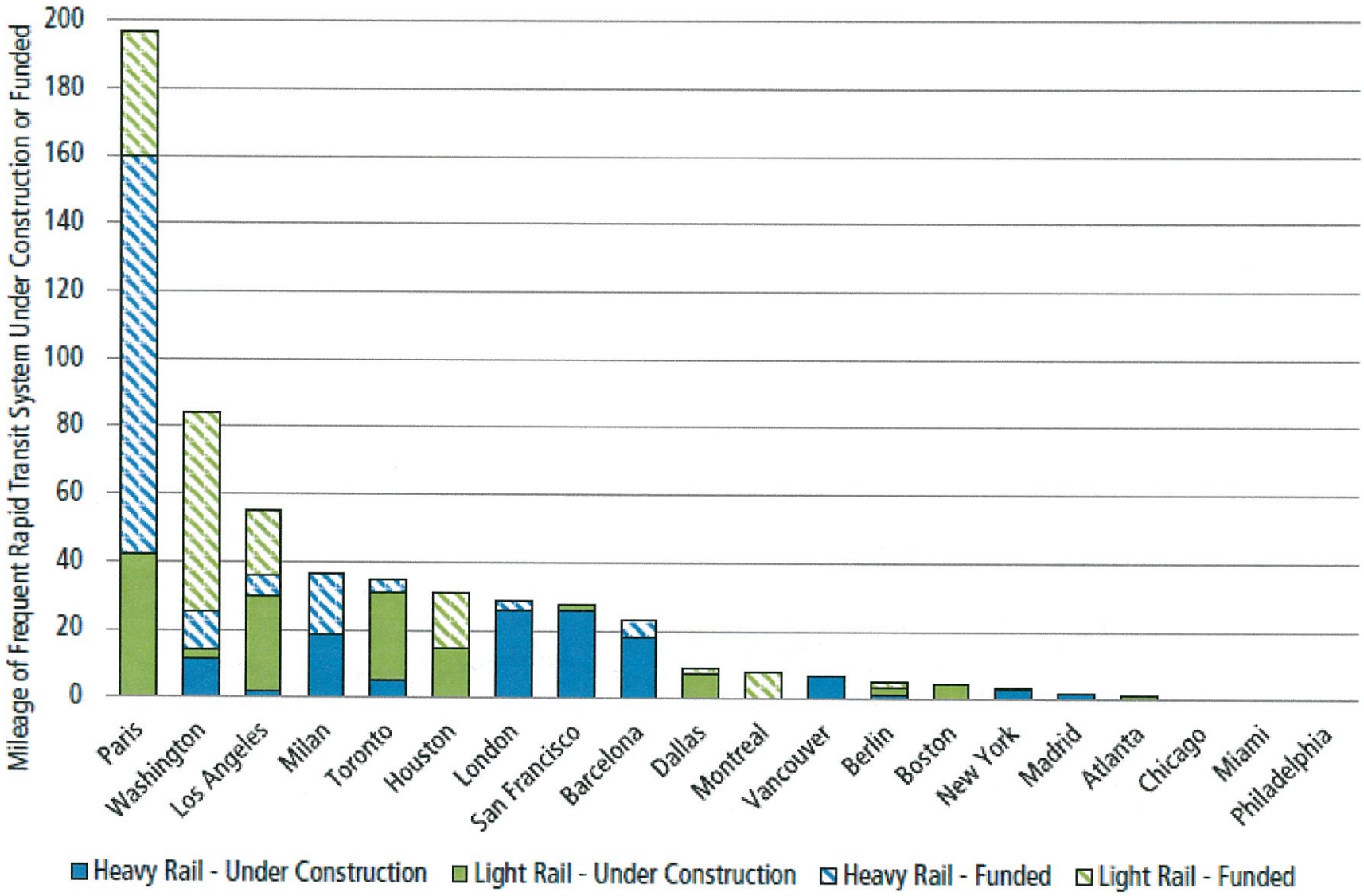
Source: *Transit Agencies Databook: The Public Transportation Network in Northeastern Illinois,* Metropolitan Planning Council, December 2013

Under construction or planned frequent, all-day new rail route mileage



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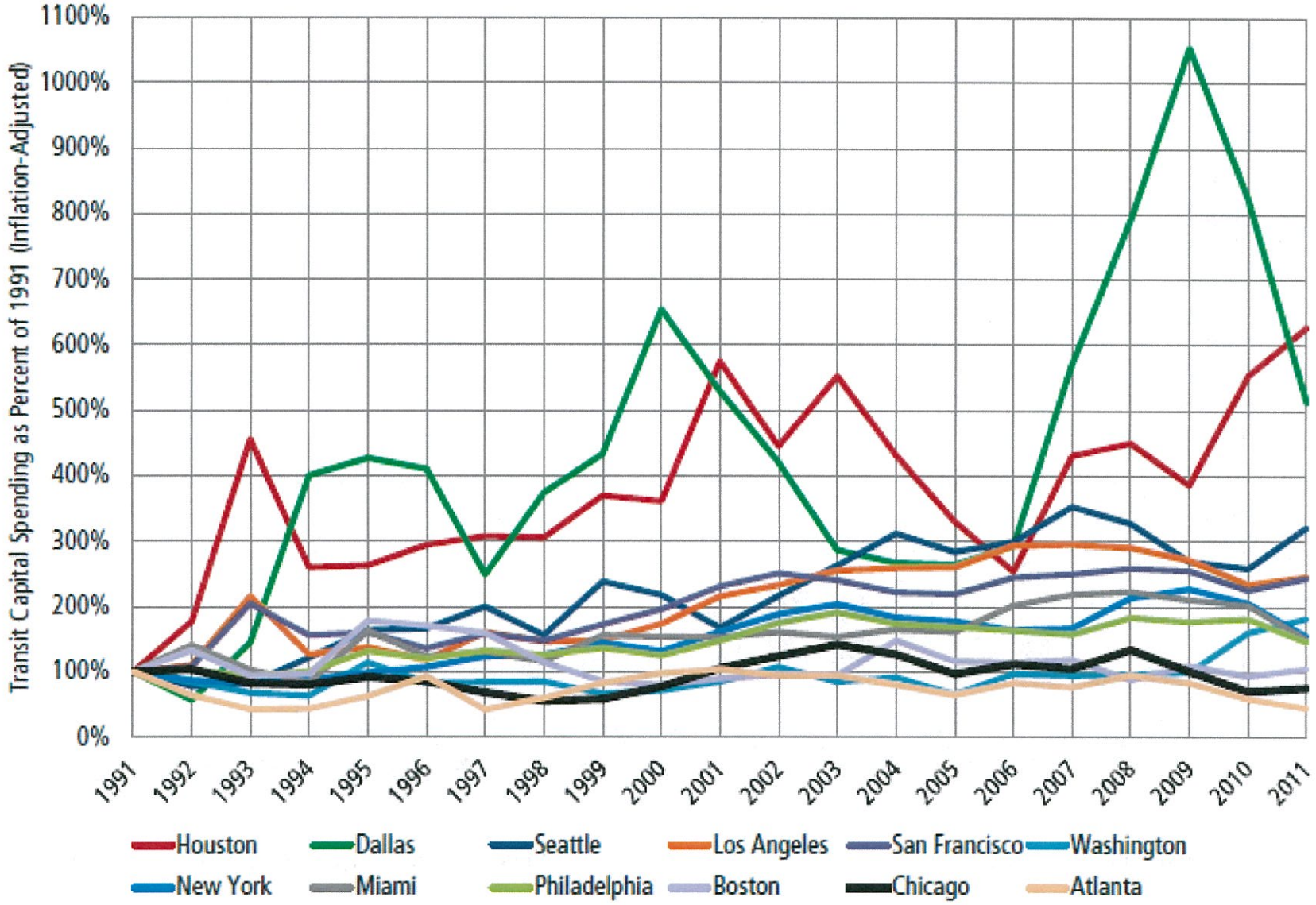
Source: *Transit Agencies Databook: The Public Transportation Network in Northeastern Illinois,* Metropolitan Planning Council, December 2013

Change in total transit capital spending by region, 1991-2011



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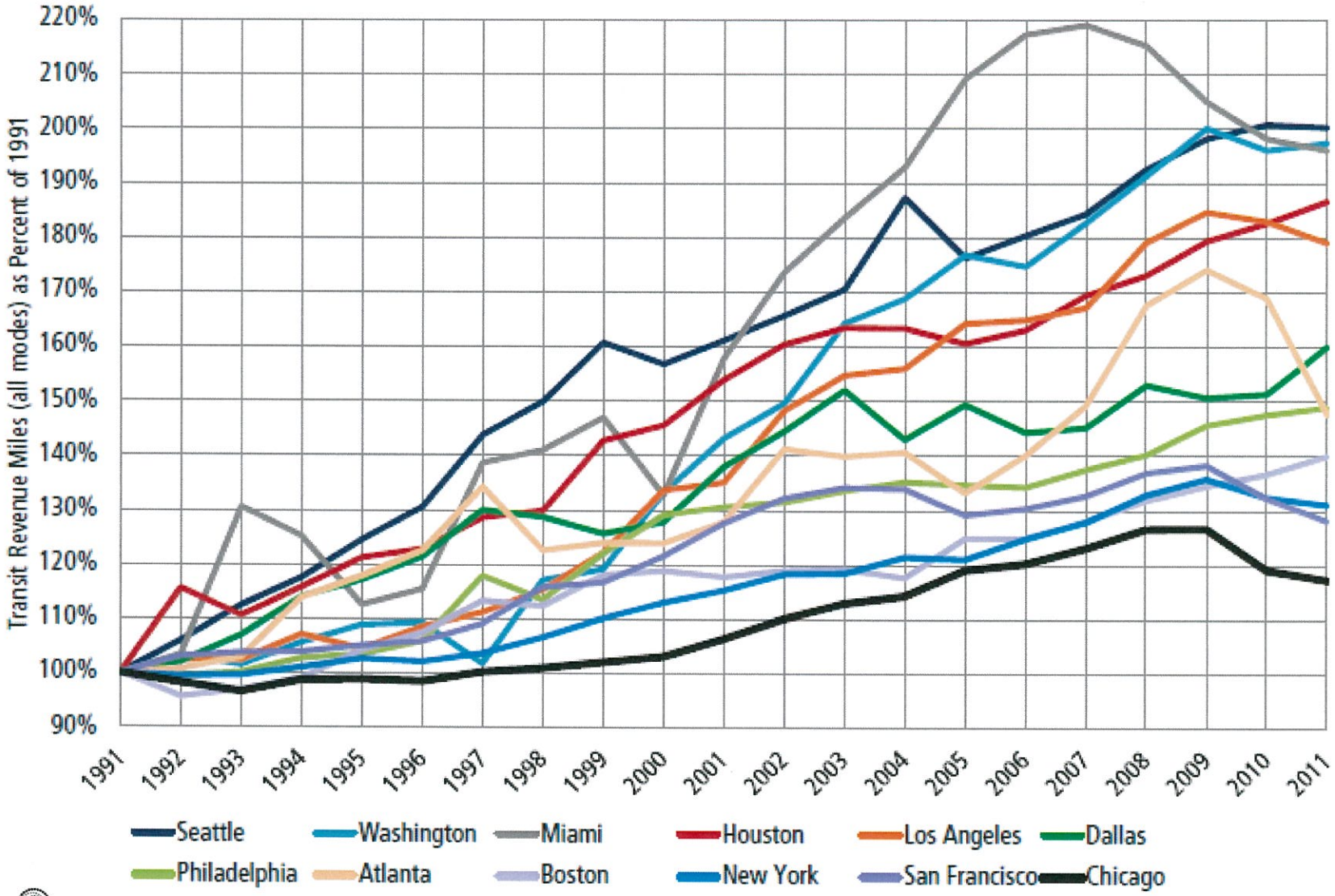
Source: *Transit Agencies Databook: The Public Transportation Network in Northeastern Illinois,* Metropolitan Planning Council, December 2013

Change in transit service revenue miles by region, 1991-2011 (all modes, all agencies)



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Source: *Transit Agencies Databook: The Public Transportation Network in Northeastern Illinois,* Metropolitan Planning Council, December 2013