MEETING 3

December 10, 2014
Agenda

☐ Where We Are Going
☐ Impact-Likelihood Voting Results
☐ Structuring Forces
☐ Breakout Groups
  ☐ What are the potential outcomes?
  ☐ What challenges and opportunities will arise in the region?
  ☐ What action steps can the region take to prepare for this driving force?
  ☐ **Voting:** Which types of transportation investments will be most important as a result of the force?

☐ Meeting Recap
Where are We Going

- DVRPC Working Groups
  - Goods Movement Task Force
  - Environmental Justice Working Group
  - Healthy Communities Working Group
  - Regional Community & Economic Development Forum
- DVRPC 50th Anniversary Survey
- Choices & Voices v3.0
- Written Report
- 2045 Long-Range Plan
Enduring Urbanism

Photo: Lucian Perkins/For The Washington Post

Image: Michael Falco for the NY Times

Photo: www.phys.org

Image: WikiTrends
Real-Time Mobility

Photo: Ridescout

Photo: www.frontporchdenver.com/ride-your-b-cycle-on-down-to-the-front-porch/

Photo: www.wikipedia.org

Photo: www.triadstrategies.typepad.com/
When it Rains it Pours
The Pennsylvania Energy Boom

Photo: Flickr user PRR 6755

Photo: Treehugger.com

Photo: Kellie McGinn/Philadelphia Energy Solutions

Photo: Flickr user PRR 6755
The Free-Agent Economy
Background Forces & Assumptions

- Partisan Paralysis
- Intelligent Infrastructure
- Connected Vehicles
- Increasing Chronic Health Conditions
- Aging Population
- Panama Canal Widening
- Growing Demand for Same-Day Delivery
- Improving Freight Logistics
  - Efficiency
  - Redundancy
- Urban School Quality Driving Family Location
- More Immigration
- Declining Water Quality

30-Year Forecasts

<table>
<thead>
<tr>
<th>Baseline Assumptions</th>
<th>US</th>
<th>Region</th>
</tr>
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<tbody>
<tr>
<td>Annual Population Growth</td>
<td>0.7%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Annual Employment Growth</td>
<td>0.9%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Vehicle VMT</td>
<td>0.8%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Truck VMT</td>
<td>1.4%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Annual Gasoline Cost</td>
<td>-0.3%</td>
<td>N/A</td>
</tr>
<tr>
<td>Annual GDP Growth</td>
<td>2.5%</td>
<td>*</td>
</tr>
<tr>
<td>Disposable Income / Capita</td>
<td>1.8%</td>
<td>*</td>
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</tbody>
</table>

* Greater Philadelphia expected to slightly trail U.S. (Source: IHS Global Insight).
Source: FWHA, IHS Global Insight, and DVRPC
Most Beneficial Investments

- **Global Marketplace**
- **Naftastique**
- **One World Order**
- **Technology Savior**

- N-S Interstates
- E-W Interstates
- NHS Highways
- Freight Connectors
- Class I Rail
- Local Rail
- Sea Ports
- Airports
Least Beneficial Investments

- N-S Interstates
- E-W Interstates
- NHS Highways
- Freight Connectors
- Class I Rail
- Local Rail
- Sea Ports
- Airports

Legend:
- Global Marketplace
- Naftastique
- One World Order
- Technology Savior
Robust Investments

- N-S Interstates
- E-W Interstates
- NHS Highways
- Freight Connectors
- Class I Rail
- Local Rail
- Sea Ports
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Legend:
- Global Marketplace
- One World Order
- Naftastique
- Technology Savior
Robust Investments

Global Marketplace
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- Global Marketplace
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[Diagram showing various investments with bars representing different categories and colors indicating different scenarios.]
Robust Investments
Contingent Investments

N-S Interstates | E-W Interstates | NHS Highways | Freight Connectors | Class I Rail | Local Rail | Sea Ports | Airports

- Global Marketplace
- One World Order
- Naftastique
- Technology Savior
Contingent Investments

N-S Interstates  E-W Interstates  NHS Highways  Freight Connectors  Class I Rail  Local Rail  Sea Ports  Airports

Global Marketplace  One World Order  Naftastique  Technology Savior