America Moves
Transportation and Public Policy in the U.S.
1 Situating the American Economy
2 Transportation’s Role
3 Moving America
4 Where Policy Fails
5 Syncing Policy and Markets
Situating the American Economy
More Jobs

7.8 million
jobs needed post-recession

Better Jobs

81m 107m
poor or near poor 2000-2010

More Accessible Jobs

46%
suburban share of poor, 1990
Growing Service Specialties

Source: Brookings analysis of BLS OES data
<table>
<thead>
<tr>
<th>Year</th>
<th>A Structural Change to the Federal Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>57.4% mandatory spending</td>
</tr>
<tr>
<td></td>
<td>6.3% interest</td>
</tr>
<tr>
<td></td>
<td>36.3% discretionary spending</td>
</tr>
<tr>
<td>2023</td>
<td>61.6% mandatory spending</td>
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<tr>
<td></td>
<td>14.4% interest</td>
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<tr>
<td></td>
<td>24.0% discretionary spending</td>
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</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>2012</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure</td>
<td></td>
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<tr>
<td>Education</td>
<td></td>
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<tr>
<td>Housing</td>
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<tr>
<td>Defense R&amp;D</td>
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</tbody>
</table>
Metro area map

Click on a metro area to view its performance ranks for the time period you choose below

Select a time period

Select an indicator

Amount recovered (peak-to-current)

Overall performance

Key national performance metrics

Recent changes in employment, unemployment, output, and house prices

<table>
<thead>
<tr>
<th></th>
<th>2013Q2</th>
<th>2013Q1</th>
<th>2012Q4</th>
<th>2012Q3</th>
<th>2012Q2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment growth</td>
<td></td>
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<td></td>
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<tr>
<td>from the previous quarter</td>
<td></td>
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</tr>
<tr>
<td>2013Q2</td>
<td>+0.3%</td>
<td>+0.4%</td>
<td>+0.5%</td>
<td>+0.3%</td>
<td>+0.4%</td>
</tr>
<tr>
<td>Unemployment rate</td>
<td></td>
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<tr>
<td>last month of each quarter, seasonally adjusted</td>
<td></td>
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<tr>
<td>2013Q2</td>
<td>7.6%</td>
<td>7.6%</td>
<td>7.8%</td>
<td>7.8%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Output (GDP) growth</td>
<td></td>
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<tr>
<td>from the previous quarter, inflation-adjusted</td>
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<tr>
<td>2013Q2</td>
<td>+0.4%</td>
<td>+0.6%</td>
<td>+1.1%</td>
<td>+0.2%</td>
<td>+0.3%</td>
</tr>
<tr>
<td>Housing price growth</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>from the previous quarter, inflation-adjusted</td>
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<tr>
<td>2013Q2</td>
<td>+0.8%</td>
<td>+0.4%</td>
<td>+0.4%</td>
<td>+0.6%</td>
<td>-0.6%</td>
</tr>
</tbody>
</table>
Metro area map
Click on a metro area to view its performance ranks for the time period you choose below
Select a time period: Amount recovered (peak-to-current)  Select an indicator: Overall performance

Las Vegas, NV
Performance between the pre-recession peak and the current quarter
100th overall (100th last quarter)  Go to detailed profile >>

Employment
- 95th: Peak quarter: Q2 2007  Change, peak-to-current: -9.0%

Unemployment
- 100th: Peak (lowest rate) quarter: Q3 2006  Change, peak-to-current: +5.5 pts.

Output (GDP)
- 96th: Peak quarter: Q2 2007  Change, peak-to-current: -8.4%

House prices
- 99th: Peak quarter: Q4 2006  Change, peak-to-current: -59.8%

Show national summary data for these indicators >>
Source: Brookings Institution, via Washington Post image
Transportation’s Role
Transportation unleashes economic activity

Enables Regions to Trade Goods
Connects Workers to Opportunity
Let's People Enjoy Life!
Moving America
The automobile dominates local travel …

VMT (billions of miles)

Source: Brookings Institution
… While other modes gain travel share

- 1 million additional transit commuters, 2000 - 2012
- 61% increase in bicycle commuting, 2000 - 2012
- 4.4% work from home, 2012
- 4.5% 1-year increase in light rail ridership
- 27 city bike share systems
- 50% increase from 1990

Source: Brookings Institution
Las Vegas

Share of Jobs Accessible by Transit

- Less than 15%
- 15% to 35%
- 35% to 50%
- 50% to 65%
- Over 65%
55% growth in Amtrak passengers, ‘97 – ‘12

83% share of passengers on short haul routes

Source: Brookings analysis of Amtrak data
International aviation grew rapidly

**Growth Since 1990**

- Orange line: International Aviation
- Blue line: Domestic Aviation
- Gray line: Real GDP
- Purple line: Population

Source: Brookings Analysis of Sabre data; Image courtesy of News Observer
92%
las vegas’ growth in international passengers, 2003 to 2011

Source: Brookings Analysis of Sabre data
Recalibrating national trade

$17.2 trillion
domestic trade market

650% larger
metro trade versus traditional international market

Source: Brookings Institution
Freight Rebounds Post-Recession

Source: Brookings Analysis of BTS Data
Modes specialize in specific trade

**Domestic Value**
- Truck: 67%
- Rail: 17%
- Water: 3%
- Air: 4%
- Multimodal: 1%
- Others: 8%

**International Value**
- Truck: 46%
- Rail: 27%
- Water: 3%
- Air: 3%
- Multimodal: 4%
- Others: 17%

Source: Brookings Analysis
LAS VEGAS FREIGHT PROFILE

$55.5 b
total goods trade, 2010

64
metro rank

INTERNATIONAL SHARE
15%
US Average

10%
Las Vegas

TOP TRADING PARTNERS ($ bil)
1. Los Angeles ........................................ $10.2
2. Phoenix ........................................... $3.6
3. Riverside ........................................ $2.3
4. New York ........................................ $2.2
5. China ........................................... $2.0
6. Chicago .......................................... $1.2
7. Salt Lake City .................................. $1.0
8. San Diego ....................................... $0.8
9. Seattle ........................................... $0.8
10. Mexico .......................................... $0.8

55.5 b total goods trade, 2010
64 metro rank
Where Policy Fails
FY 2014 Projected Estimates for End-of-Month Cash Balances (as of 1/31/2014) ¹/²/³/  
Highway Account of the Highway Trust Fund (Includes FHWA, FMCSA & NHTSA)
<table>
<thead>
<tr>
<th>Federal</th>
<th>State</th>
<th>Local</th>
<th>Private</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Image of Federal Infrastructure" /></td>
<td><img src="image2.png" alt="Image of State Infrastructure" /></td>
<td><img src="image3.png" alt="Image of Local Infrastructure" /></td>
<td><img src="image4.png" alt="Image of Private Infrastructure" /></td>
</tr>
</tbody>
</table>
$47 m
Operating Performance, Short Haul Routes

-$614 m
Operating Performance, Long Haul Routes

Source: Brookings analysis of Amtrak data
<table>
<thead>
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<th>Federal</th>
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<th>Local</th>
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</tr>
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<tbody>
<tr>
<td><strong>Germany</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Canada</strong></td>
<td></td>
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<tr>
<td><strong>United Kingdom</strong></td>
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</tr>
</tbody>
</table>

- Competitive International Gateways
- Building Australia Fund
- User Pays
- PPPs
- Future Funding
- Transformer our Cities
- Renewable Energy
- National Broadband
- Water
- Support smart infrastructure development
- Indigenous Communities
- Energy
- Support reform and investment initiatives for a national energy market and renewable energy
- Reform and Invest
- Strategy for Australia’s Indigenous Infrastructure
- Super
- Govt Investment
State-Consolidated VMT Projections

Source: SSTI
<table>
<thead>
<tr>
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<th>State</th>
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</tr>
</thead>
</table>

- **Federal**: Federal highways are managed by the U.S. Department of Transportation. They are the primary roads that connect cities and states.
- **State**: State highways are managed by state governments. They connect cities within a state and are important for regional transportation.
- **Local**: Local roads are managed by local governments. They are essential for connecting neighborhoods and providing access to schools, hospitals, and other community services.
- **Private**: Private roads are not owned or operated by government entities. They are typically owned by individuals or private companies and are used for access to properties or for transportation within private developments.

![SPEED LIMIT 85](image)

![Map of road network](image)
Transit Coverage

Federal
- Low Income: 89%
- Middle Income: 70%
- High Income: 53%

State

Local

Private

Jobs Accessible by Transit

Low Skill
- Low Income: 26%
- Middle Income: 27%
- High Income: 33%

Source: Brookings Institution
LocalState

43 percent
jobs more than 10 miles from the CBD

Source: Brookings Institution

55 percent
share of households living in poverty located in suburbs

Source: Brookings Institution
<table>
<thead>
<tr>
<th>Federal</th>
<th>State</th>
<th>Local</th>
<th>Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,600,000,000,000</td>
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<td></td>
</tr>
<tr>
<td>$170,000,000</td>
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</tr>
</tbody>
</table>
Change in GHG Emissions
1990 to 2010

- Federal: 74%
- State: 20%
- Local: 19%
- Private: -4%

Source: Brookings analysis of federal data
Syncing Policy and Markets
Federal Policy

Reauthorize with Purpose
Bring a Market Approach
Establish a National Freight Strategy

Water Resources
Surface Transport

Private Financing Office
America Fast Forward Bonds
Los Angeles Measure R

- Passed in 2008, a half-cent increase for 30 years, scheduled to raise $40 billion
- Dramatic fixed-route transit investments, plus bus operation and highway capital
- Attempting to leverage guaranteed funding to accelerate construction
Washington DC Metro Value Capture

- Created a public-private partnership to build an infill, heavy rail stop
- Generated significant office and residential investment in a downtrodden, core neighborhood
- Now the fastest-growing Metro stop in the system
US DOT / HUD
Affordability Portal

- Worked with nonprofit researchers to develop tool, which includes neighborhood comparisons

- Provides a statistical offset to the more expensive housing in denser neighborhoods
What industries do you want to grow?

Recognize the federal government won’t save you

Use transport to promote long-term economic health
America Moves
Transportation and Public Policy in the U.S.