



Homes on Track

Building Thriving Communities
Around Transit

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Our region



REGION AT A GLANCE

3

States

31

Counties

782

Municipalities

23 million

Residents

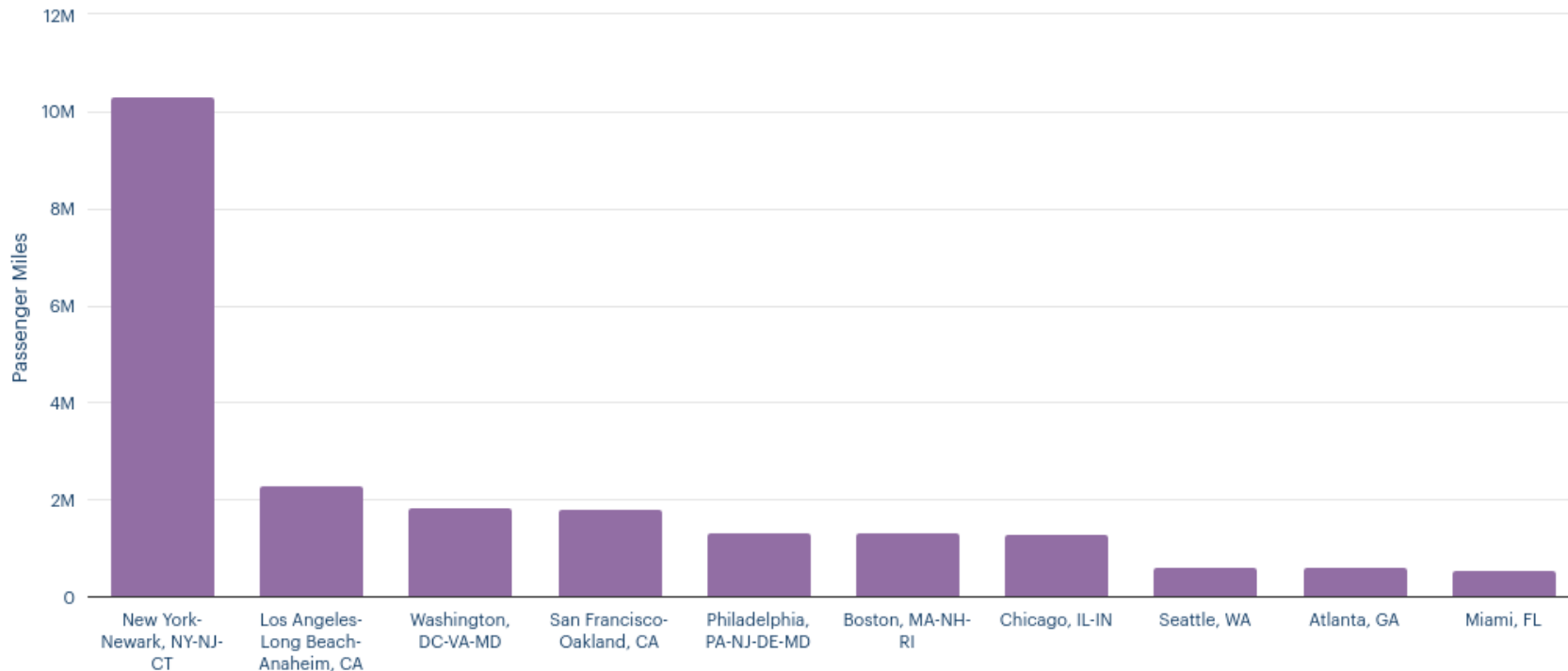
13 thousand

Square Miles

Most extensive transit network in the U.S.

Transit Passenger Miles in 2020 by Urbanized Area

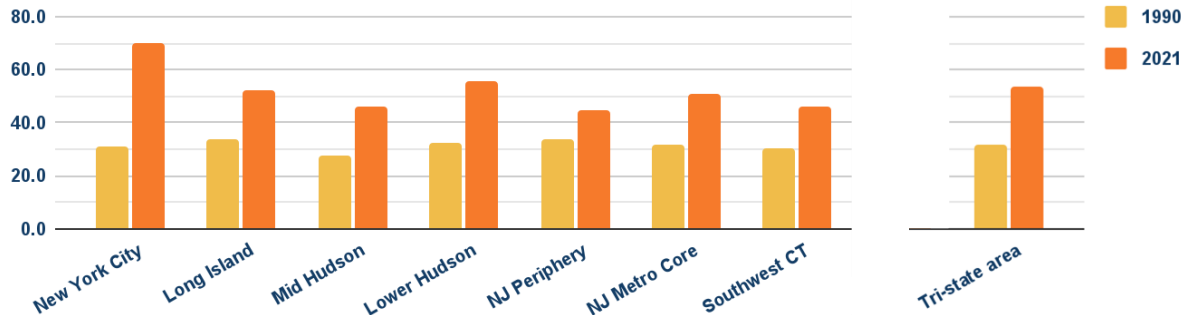
American Public Transportation, 2022 Public Transportation Fact Book



**More
households
across the
region are
burdened
by housing
costs**

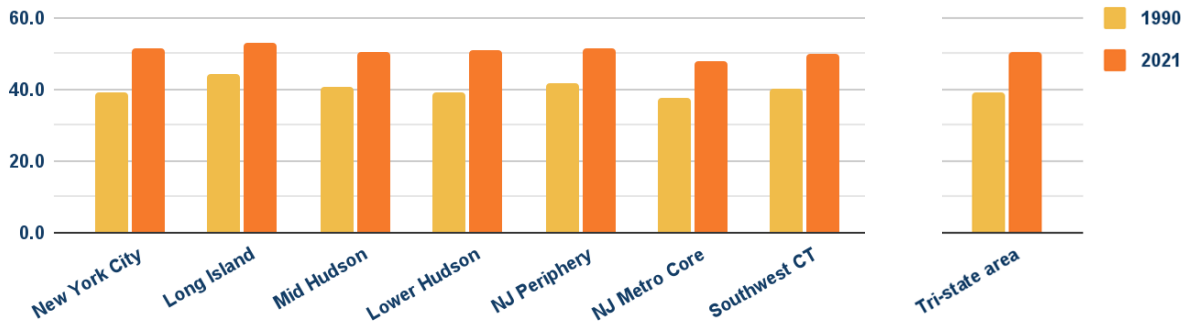
Share of Cost Burdened Owner Occupied Units (with Mortgage)

RPA Analysis based on Decennial Census and American Community Survey



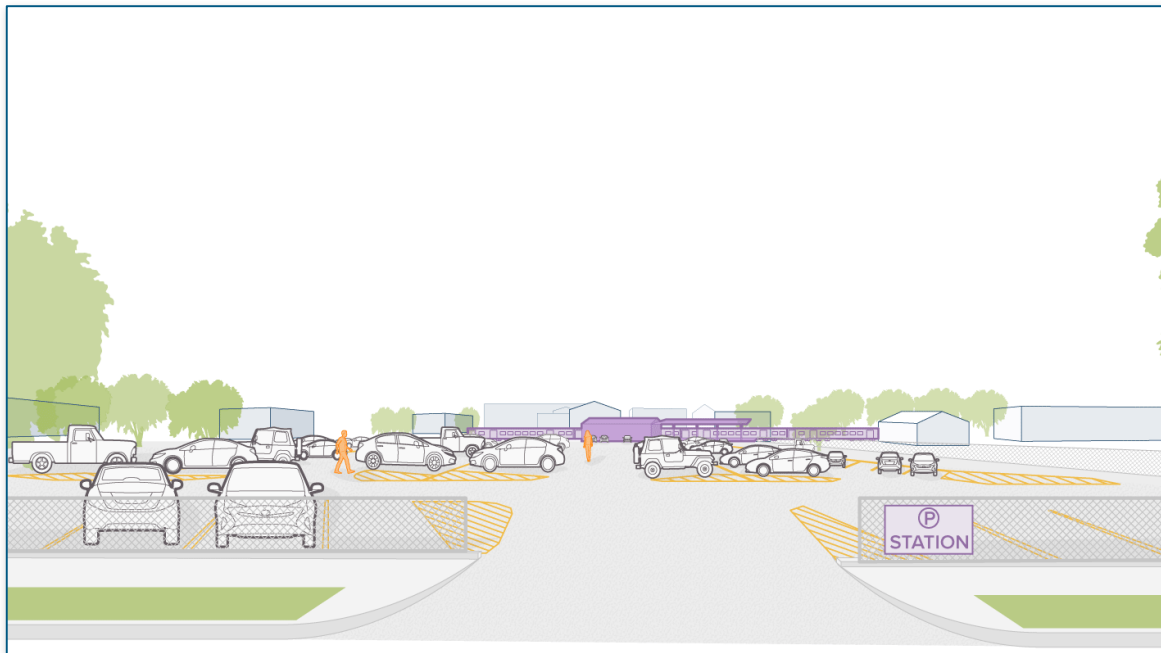
Share of Cost Burdened Renter Occupied Units

RPA Analysis based on Decennial Census and American Community Survey



Rethinking Underutilized Land

Stations in NY and NJ are surrounded by approximately 74,000 acres of underutilized land, including vacant and unbuilt lot cover.



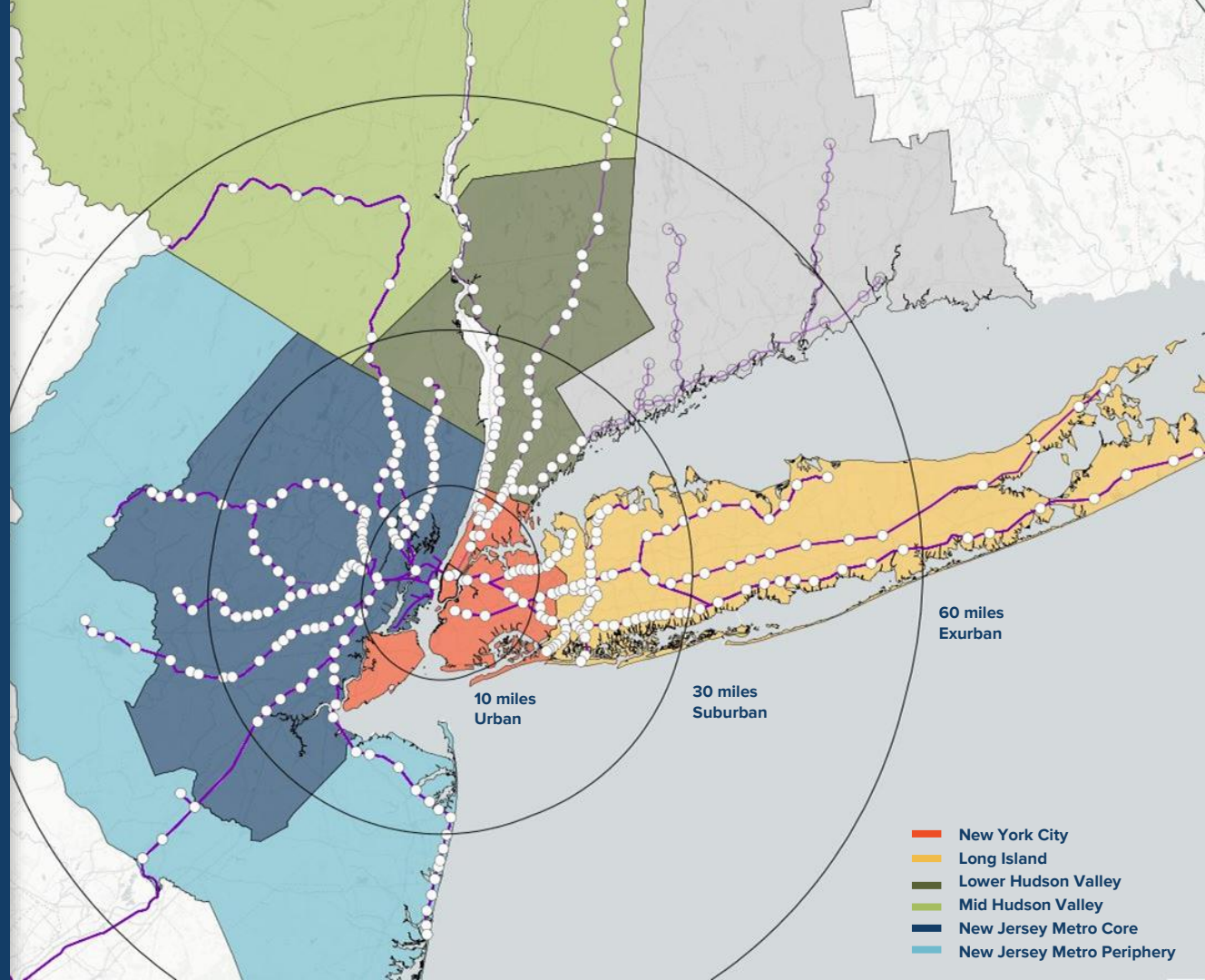
Reduced parking minimums and right-sizing parking can free up valuable space to create housing near transit.

TOD Opportunity Analysis



Study Area

Commuter Rail Stations in NY & NJ



What leads to successful TOD?

Transit Orientation

Built Form

- Residential Density (DU/Acre)
- Land Use Diversity (Shannon Index)

Mobility

- Transit Accessible Jobs (Multimodal 45 min)
- Pedestrian Friendly (Walking Time to Station)

Environment

- Sewer Infrastructure (Households served)
- Low Flood Risk (FEMA Floodplains)

Underutilized Land

Underutilized Parcels**

- Vacant land (Acres of land)
- Unbuilt lot area (Acres of land)

Growth Rates (projected 2040)

- Population Growth

**Small sized and oddly shaped parcels were excluded from the estimate

Indicators Initially Examined

Land use & Housing

Residential Density (DU/Acre)

Dwelling Units (DU) by Housing Type (Single Family, Middle Density, Multifamily)

Land use (area devoted to residential, retail/commercial, office, industrial, vacant land, surface parking, brownfields)

Shannon Index (to summarize land use mix diversity)

Lot Coverage (unbuilt area)

TOD Multi Family Friendliness (zoning index from the Untapped Potential study)

Mobility

Travel Time to CBD

Access to Employment (number of jobs within 45 mins of travel time)

Last mile connections (Bus stops)

Transit Frequency (Rail and Bus Headways)

Walk Access to Rail Station (Parcels within 5-10 min walk distance)

Walk Score TM

Vehicular miles traveled per household

Environment

Sewer Infrastructure (households with access)

Fema 100 year floodplain
2050 floodplain

Socio-Demographic

Race and Ethnic Composition

Household Income (income below \$35,000 and above \$100,000)

Household Composition (population in labor force commuting by mode of transport, population above 65 years of age, average number of residents)

Population and Job Growth Rate (2040 Scenario A High Growth Low Dispersion)

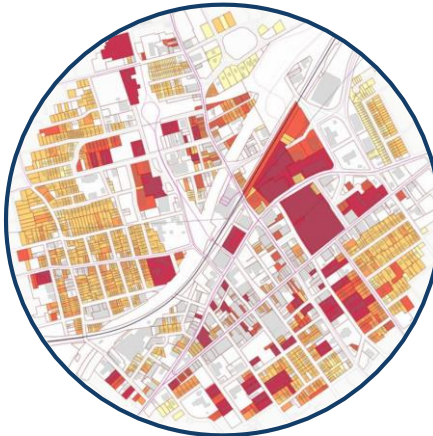
Parcel Level Analysis



Average Walk Time to Station



Land Use Mix (Diversity)



Residential Units per Acre



Acres of Vacant & Unbuilt Land

Transit Orientation Score

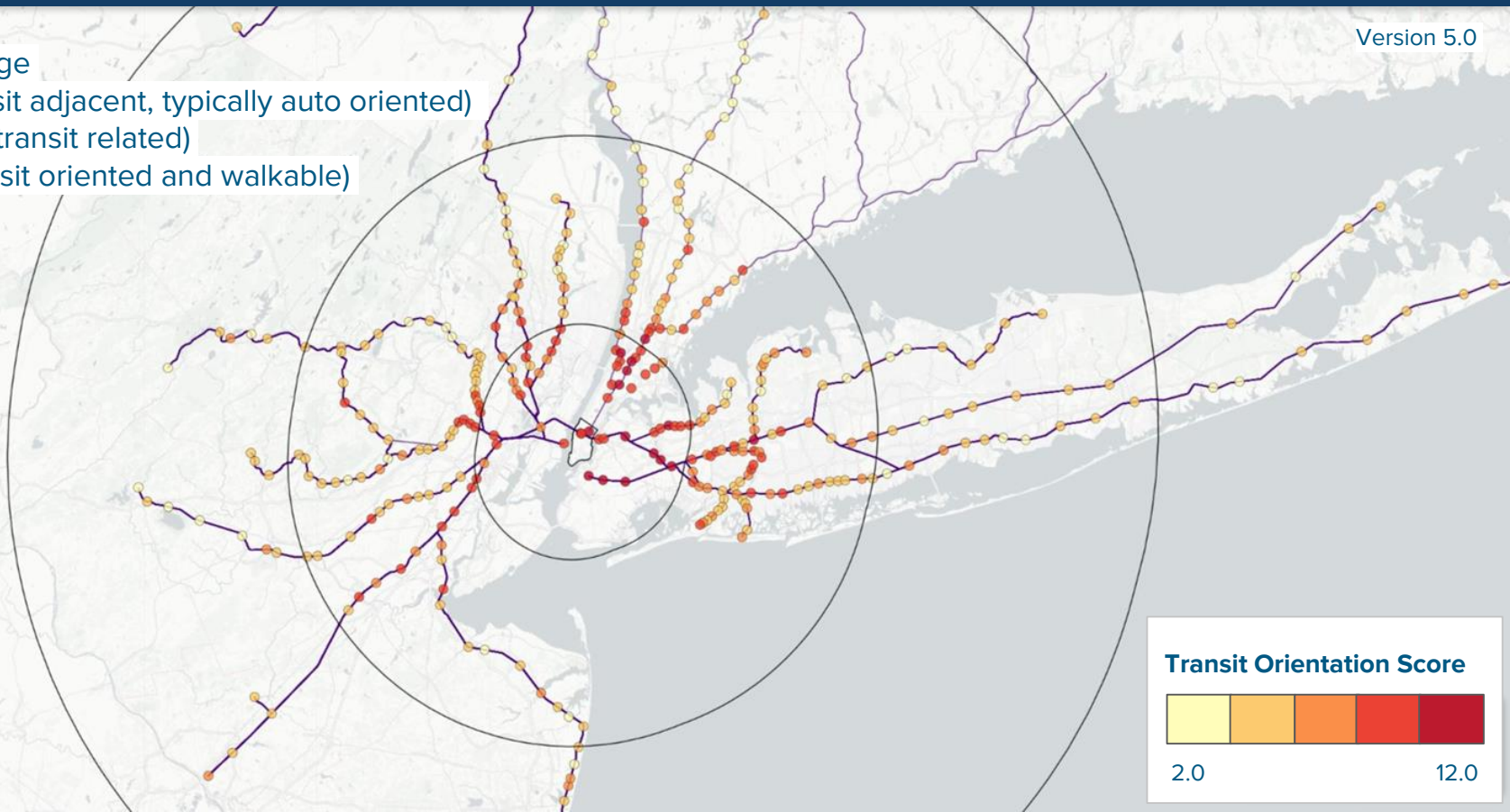
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Score range

Low (transit adjacent, typically auto oriented)

Medium (transit related)

High (transit oriented and walkable)



Transit Orientation Score

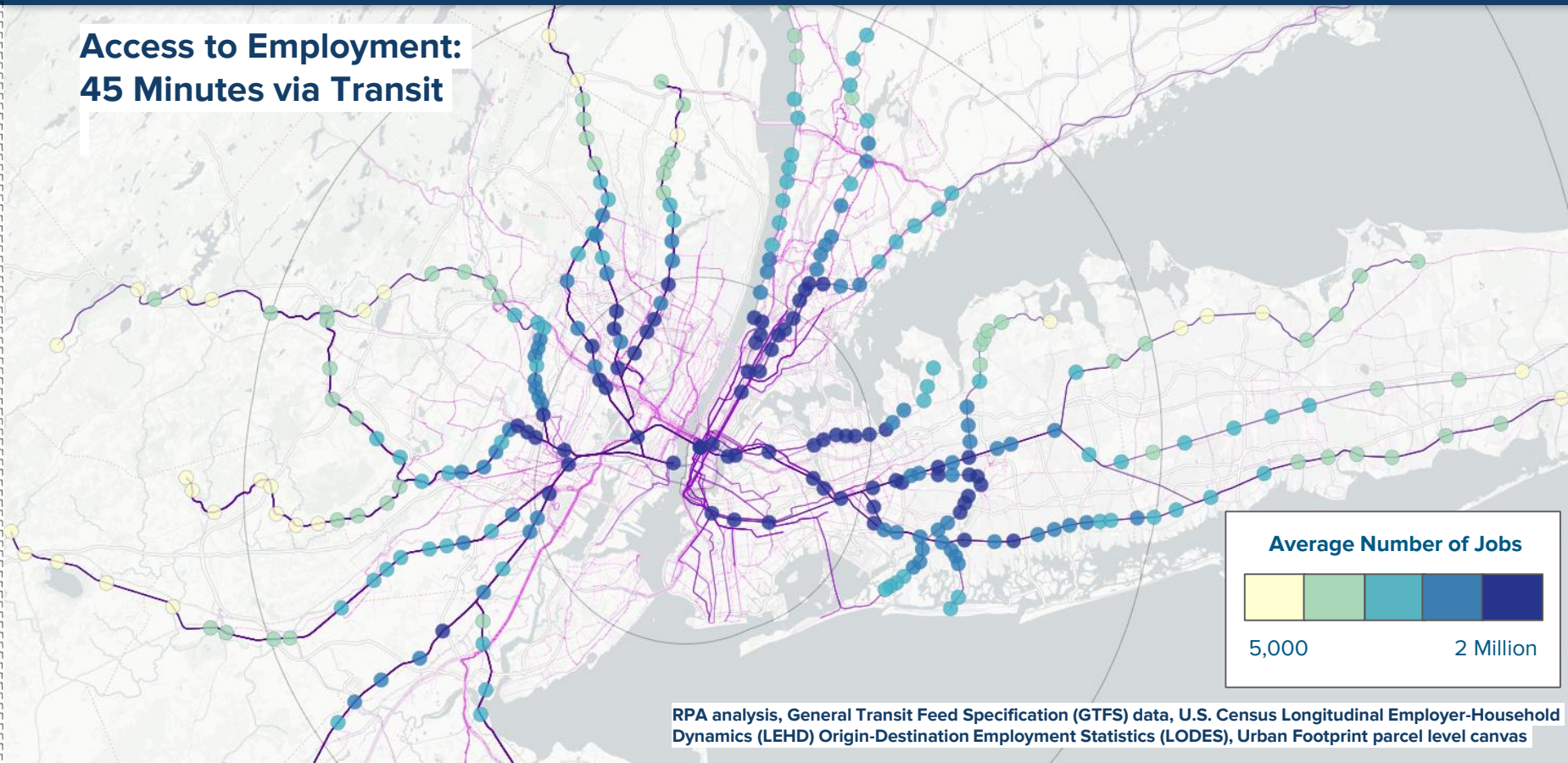


2.0

12.0

Regional Level Analysis

**Access to Employment:
45 Minutes via Transit**



RPA analysis, General Transit Feed Specification (GTFS) data, U.S. Census Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES), Urban Footprint parcel level canvas

Underutilized Land Score

Version 5.0

Score range

Low (limited development options)

Medium (emerging demand)

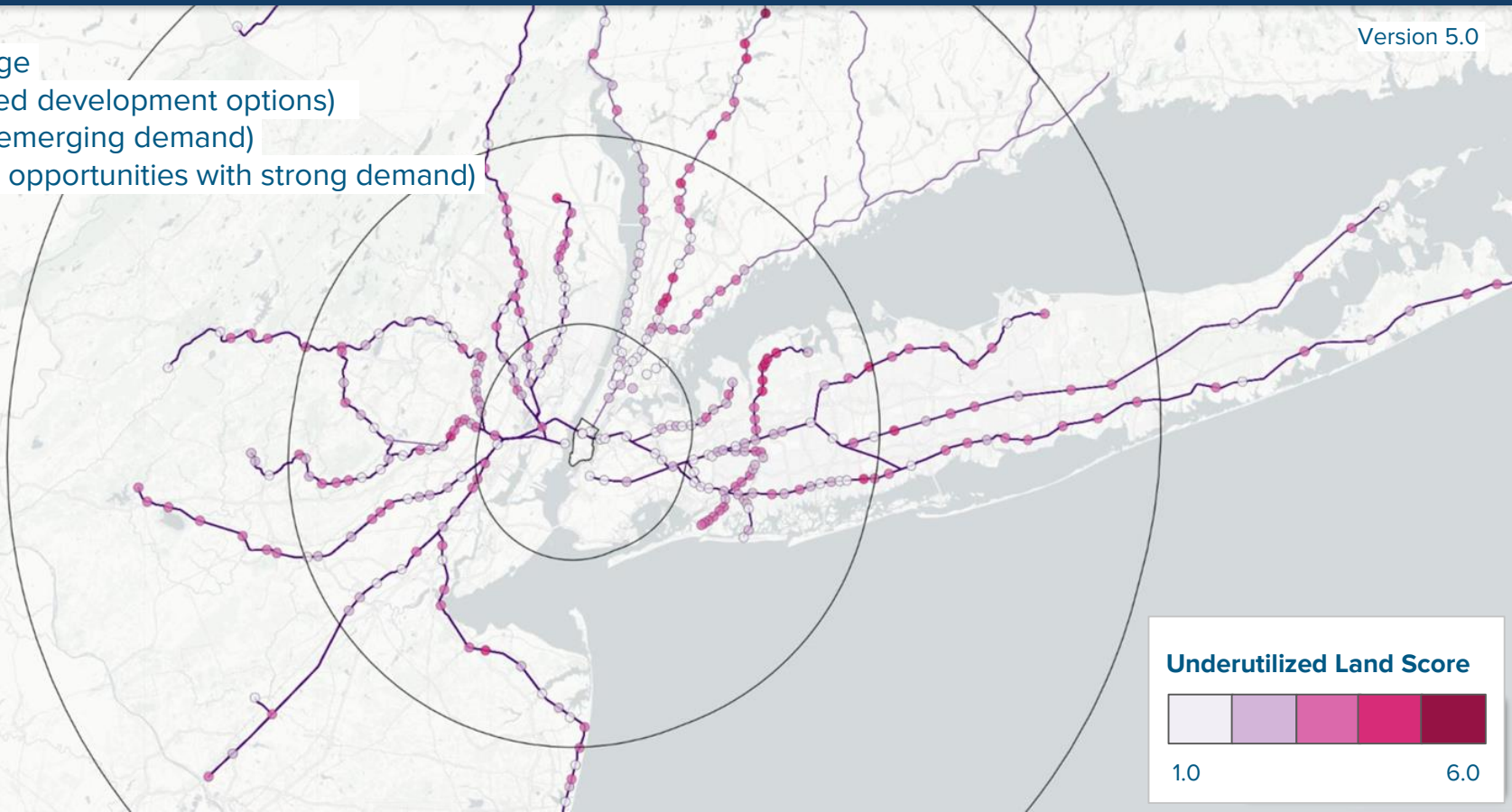
High (infill opportunities with strong demand)

Underutilized Land Score



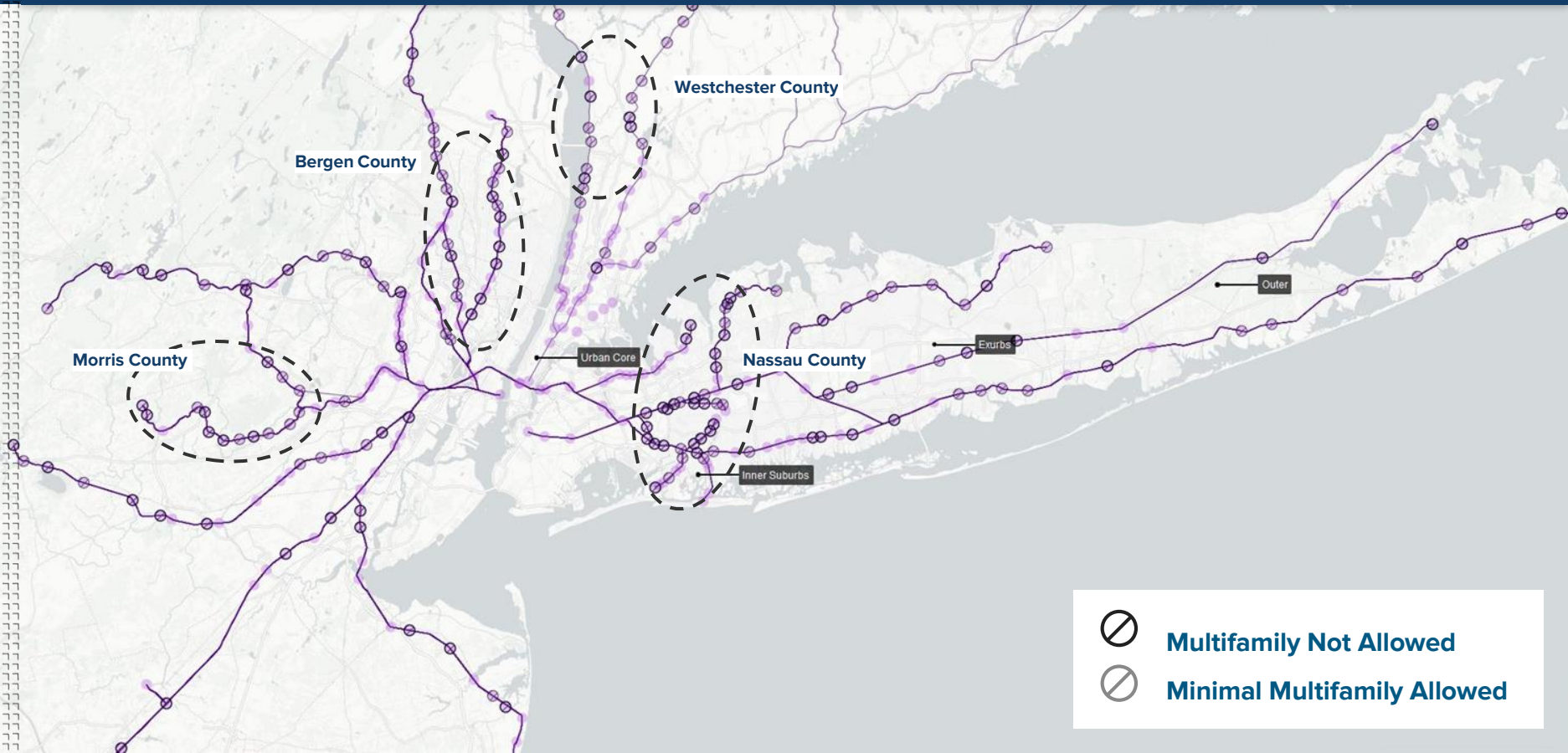
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Key Findings

TOD is Highly Restricted by Zoning



TOD Opportunity

Near term: Ripe for TOD

Mid term: Emerging

Long term: Lower priority

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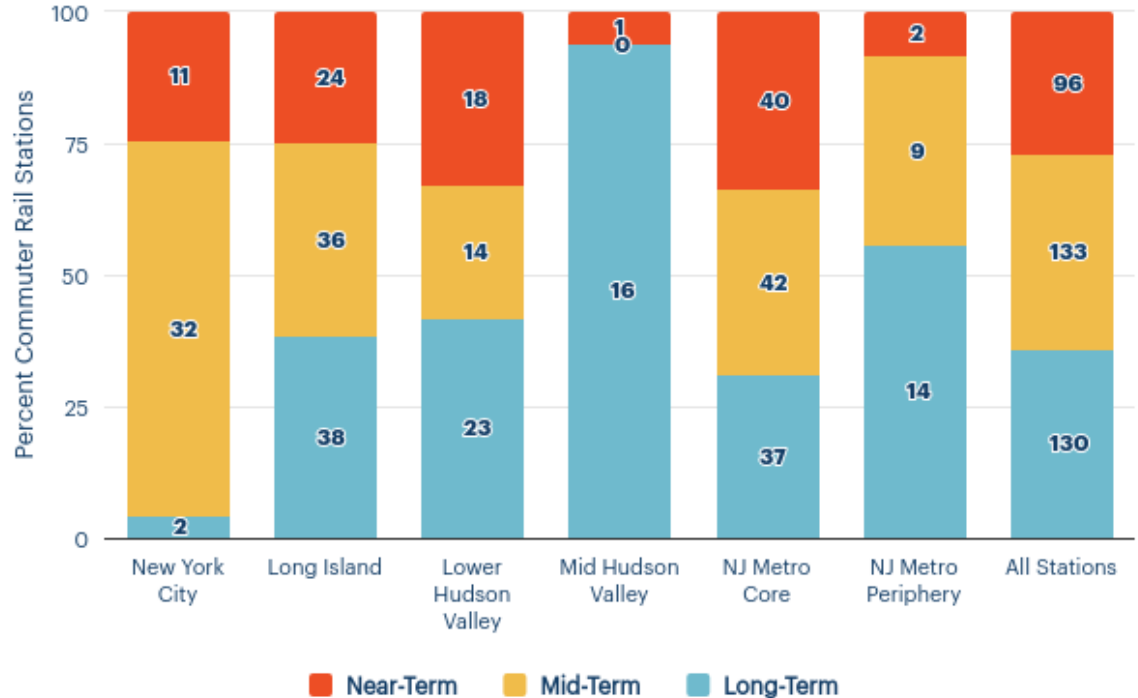
TOD Opportunity

	Near Term	Mid Term	Long Term
Description	Already have physical and mobility attributes for successful TOD	Have most mobility attributes but lack either physical characteristics or sufficient development capacity	Have significant amounts of underutilized land but lack key mobility or physical features
Typical Investments Needed	<ul style="list-style-type: none">● Plazas● Streetscape improvements● Signage	<ul style="list-style-type: none">● New streets● Pedestrian rail crossings● Station improvement	Large-Scale Infrastructure Investments <ul style="list-style-type: none">● Robust transit modes● Structured parking facilities● Sewers● Flood protection● Redesigned stations
Typical Regulatory Investments	<ul style="list-style-type: none">● Updated zoning codes● Higher densities● Reduced parking minimums● Accelerated permitting	<ul style="list-style-type: none">● Extensive zoning changes to allow multi-family and mixed-use at appropriate densities	<ul style="list-style-type: none">● Master planning● Extensive zoning changes

Near Term Opportunities are largely concentrated in the urban core and inner suburbs

TOD Types by Subregion

Commuter Rail Stations in New York and New Jersey



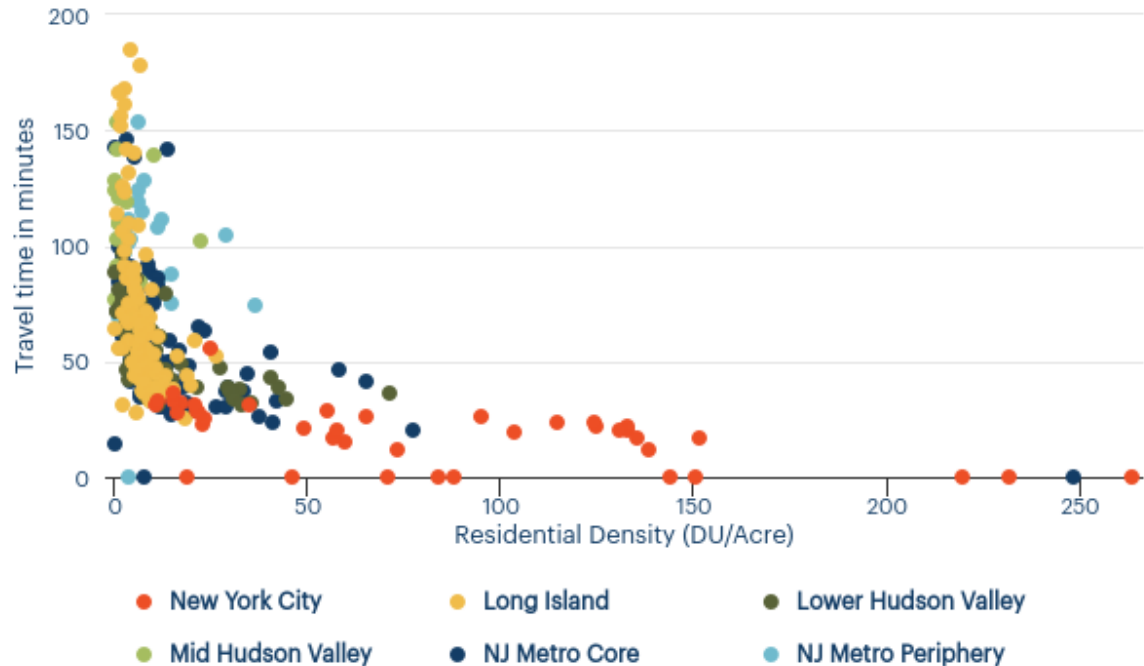
RPA analysis based on station area characteristics: built form, mobility, environmental, and underutilized land

TOD in the Region

Residential density around stations quickly increases with shorter travel to the CBD but levels out after one hour or more

Relation between Residential Density and Travel time to CBD

Commuter Rail Stations in New York and New Jersey



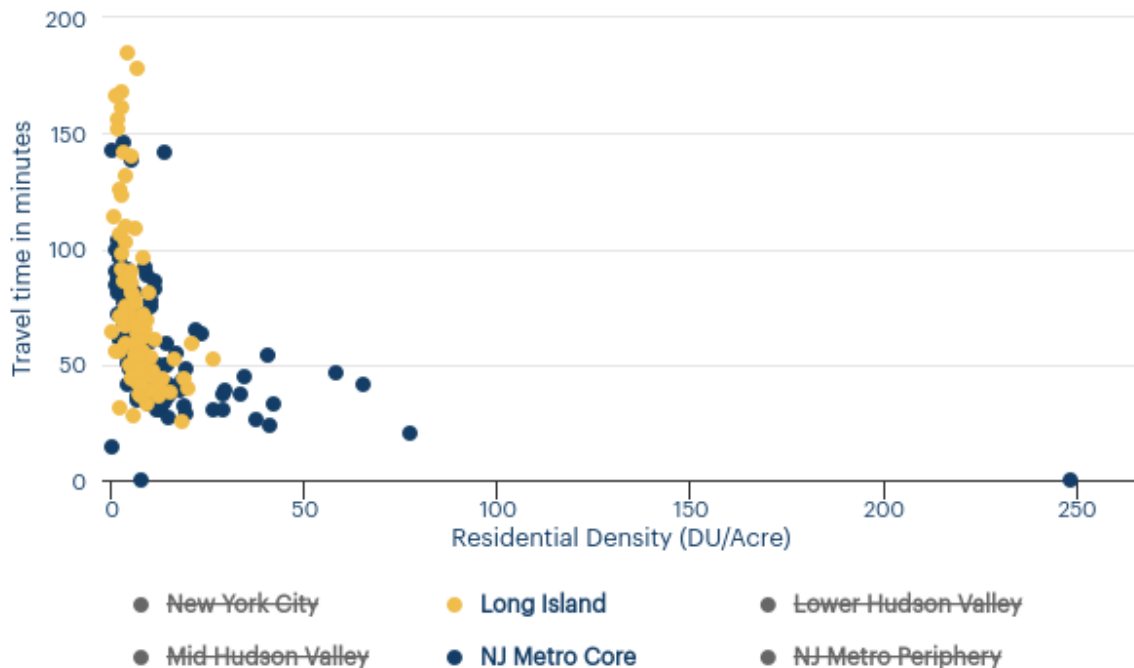
RPA Analysis, General Transit Feed Specification (GTFS), CoreLogic, U.S. Decennial Census data, Urban Footprint parcel level canvas.

TOD in the Region

Compared to New Jersey, residential densities around Long Island stations remain low regardless of their proximity to the CBD or number of jobs

Relation between Residential Density and Travel time to CBD

Commuter Rail Stations in New York and New Jersey



RPA Analysis, General Transit Feed Specification (GTFS), CoreLogic, U.S. Decennial Census data, Urban Footprint parcel level canvas.

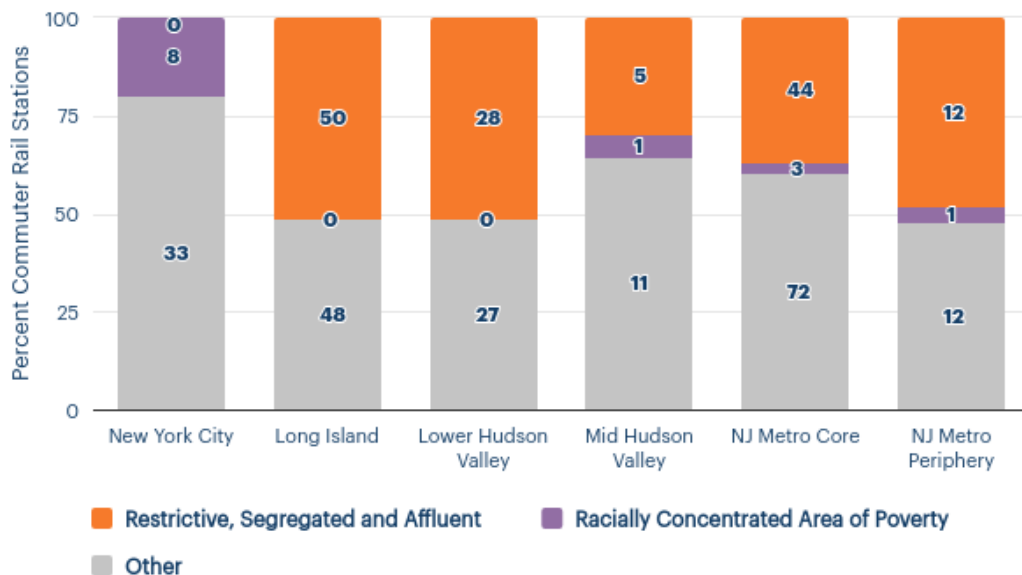
Equitable TOD

Two groups of stations based on Sociodemographic characteristics:

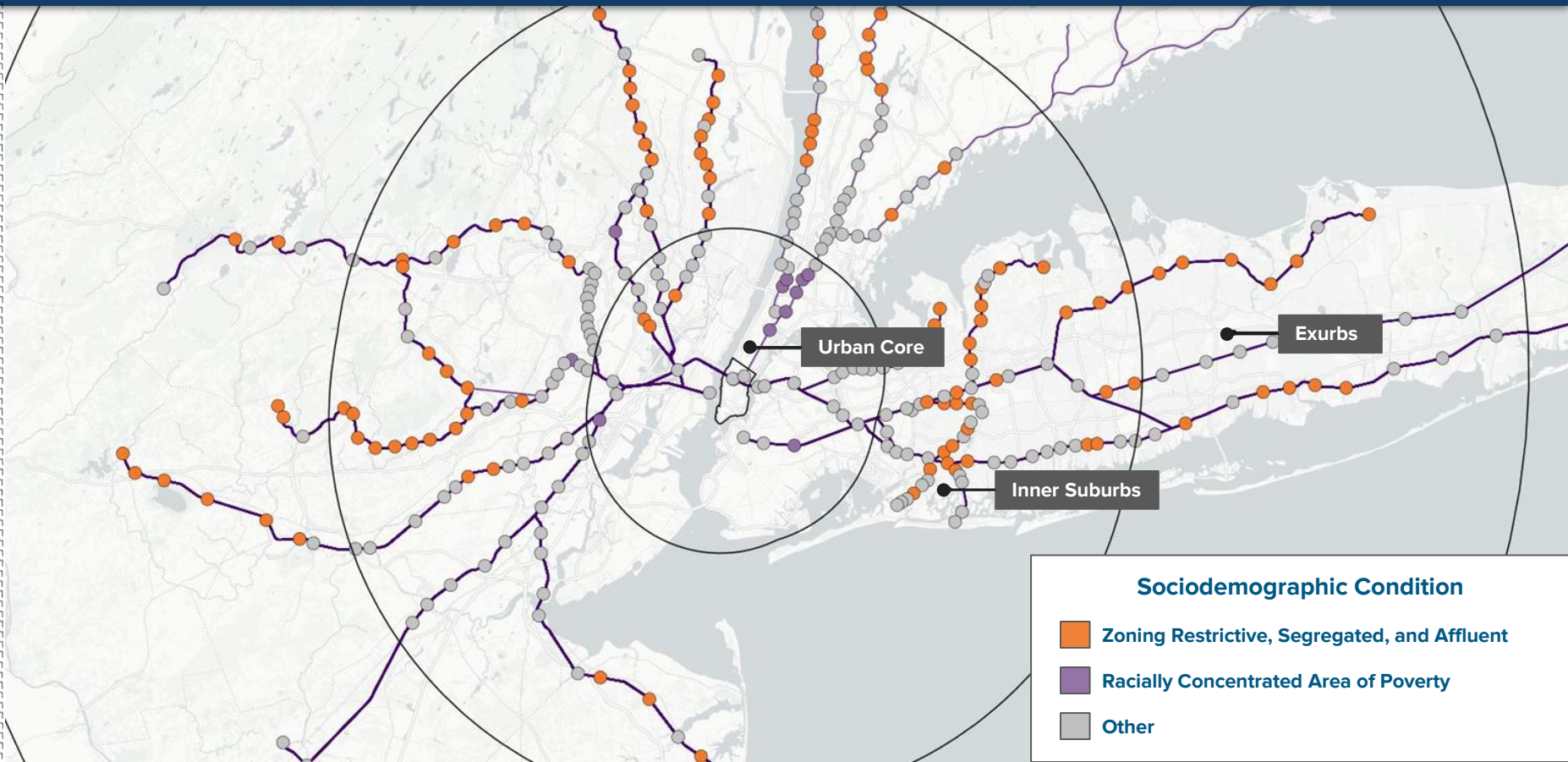
- Restrictive, segregated, and affluent neighborhoods
- Racially or ethnically concentrated areas of poverty

Stations by Socio-demographic Condition and Subregion

Commuter Rail Stations in New York and New Jersey



Equitable TOD



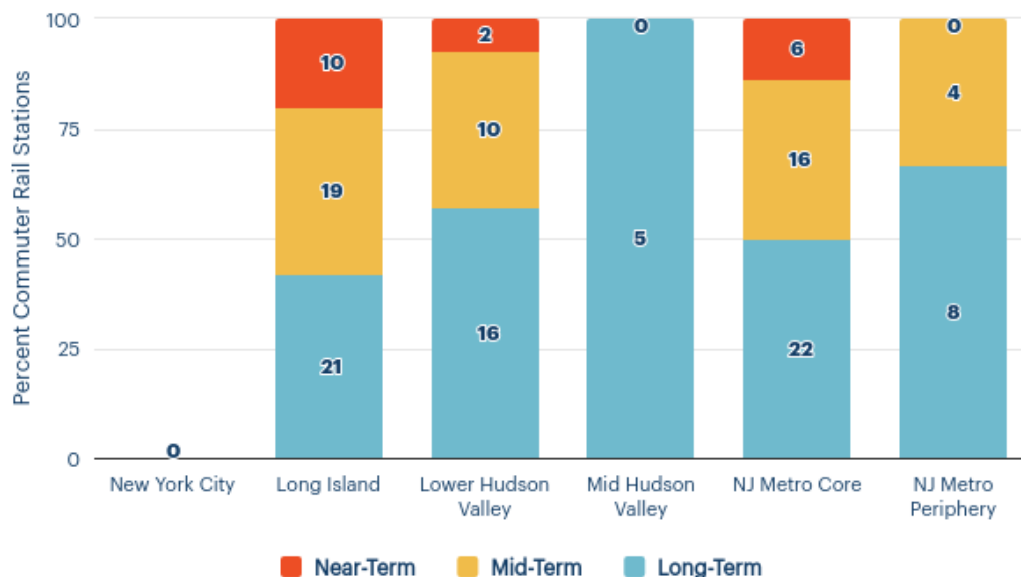
Restrictive, Segregated, and Affluent Stations

Near-Term and **Mid-Term** stations classified as **restrictive, segregated, and affluent** are largely concentrated in the inner suburbs.

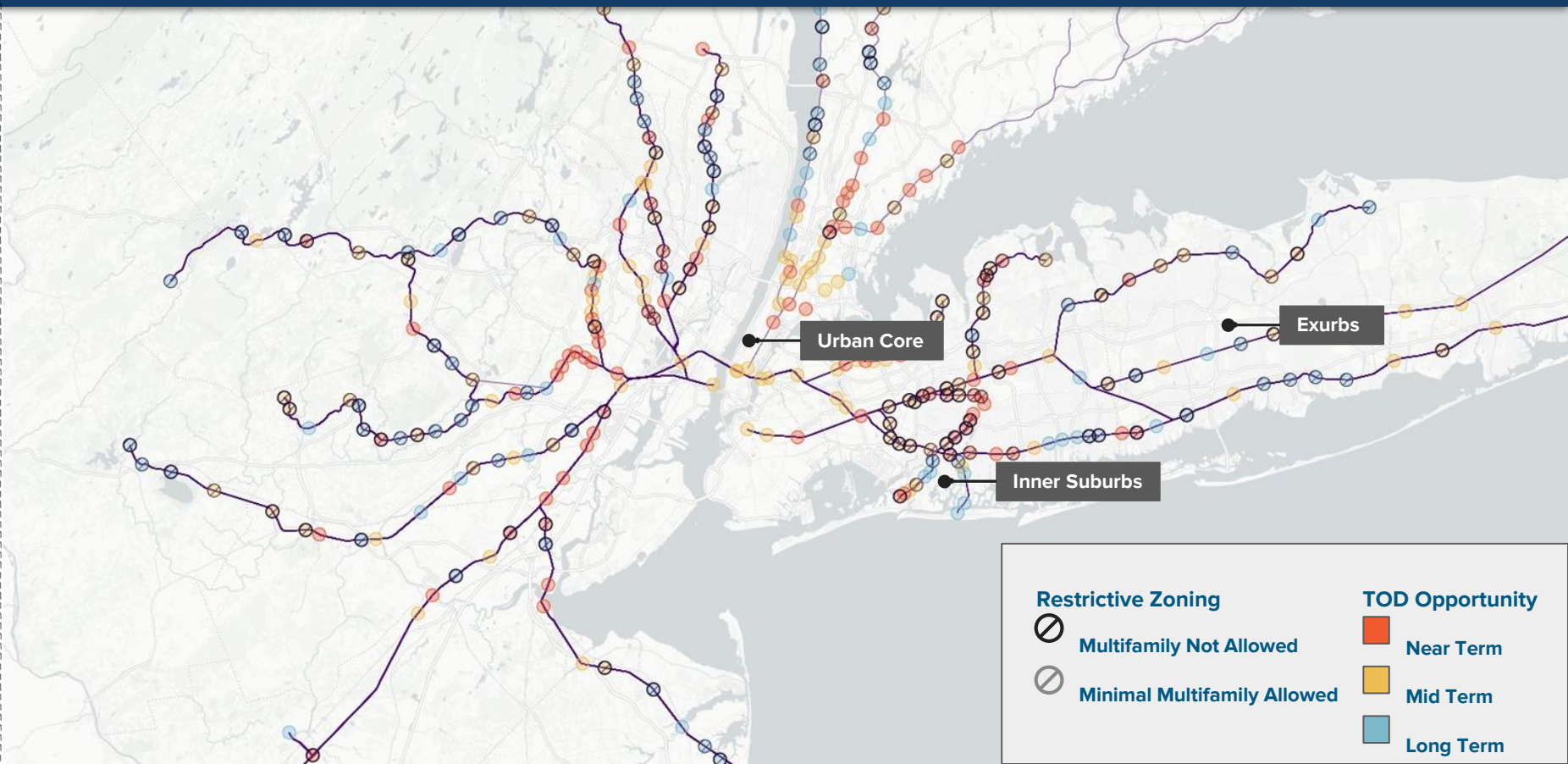
In Long Island and NJ Metro Core, the majority of restrictive, segregated, and affluent stations are considered **Near-Term** and **Mid-Term** locations (59% and 53% respectively).

Restrictive, Segregated and Affluent Stations by Types & Subregion

Commuter Rail Stations in New York and New Jersey



Restrictive, Segregated, and Affluent Stations



Policy Opportunities



State Programs & Legislation

New York State

Localized Efforts

- Place based TOD planning
- First & Last Mile Toolkit

Funding Programs

- Pro-Housing Community Program
- Downtown Redevelopment Initiative (DRI)
- New York Forward Program

New Jersey

Transit Village

- Currently 35 designated Transit Villages
- TOD Technical assistance and grants

Affordable Housing Obligations

- Mount Laurel Codified
- Extra Credit for TOD Units

Parking Bill

- Reducing parking minimums across transit hubs

Connecticut

Work Live Ride Bill

- Office of Responsible Growth (liaison between state and local governments)
- State funds to towns that opt to create transit-oriented communities

**Questions?
Comments?**

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