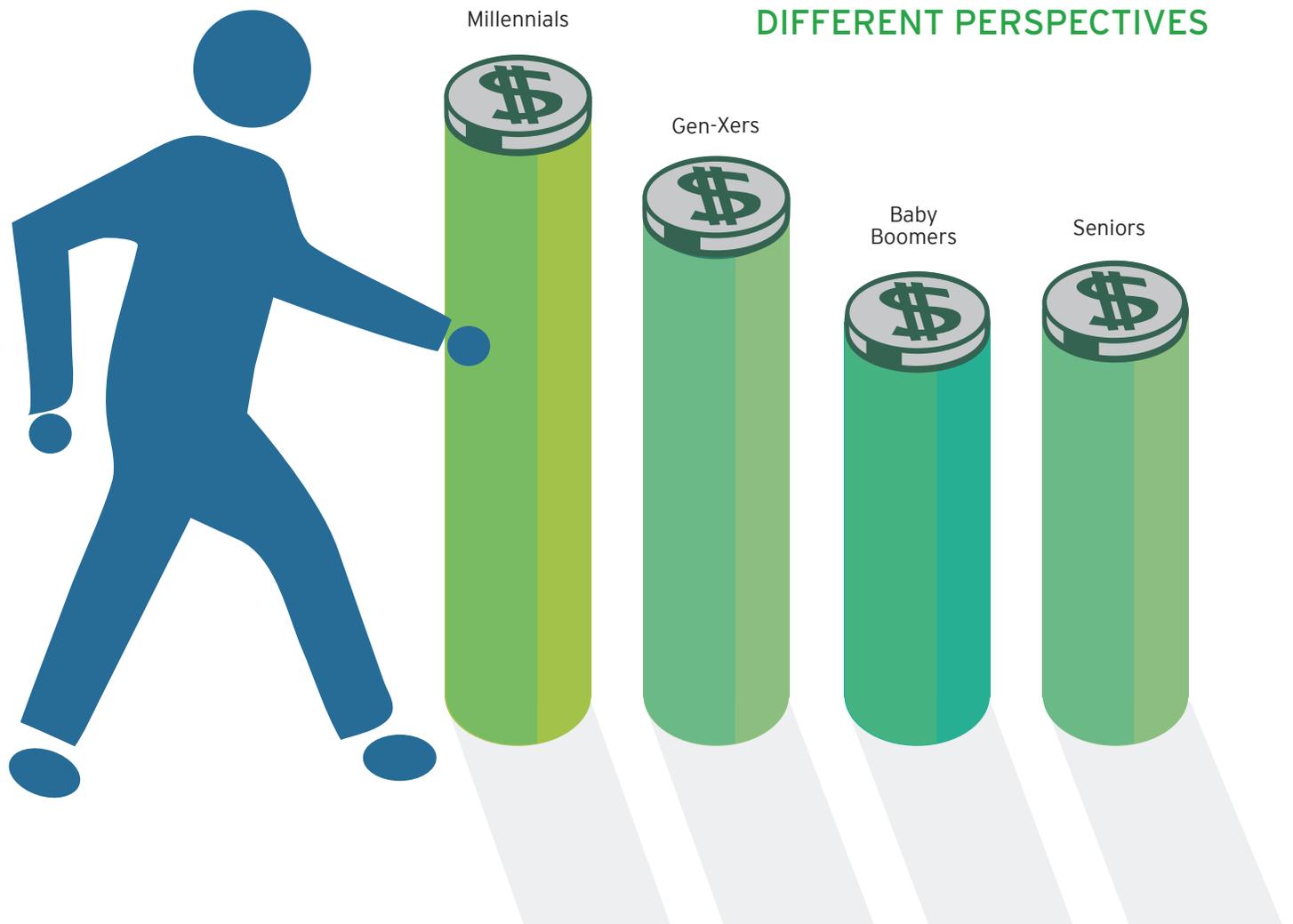




America **THINKS** 2016 Survey Compilation

AMERICANS' VIEWS ON U.S. TRANSPORTATION



Identifying concerns, evaluating potential solutions and understanding different perspectives to help create innovative approaches needed for America's infrastructure.

Americans widely accepted the value and importance of adequate funding to enable maintenance and expansion of our transportation infrastructure. With this realization comes the recognition that federal gas taxes—the traditional source of funding—are unable to meet this critical need. Election Day 2016, demonstrated that Americans realized other funding streams are needed by approving 22 ballot initiatives that will provide \$203 billion in funding extensions and new revenue for state and local transportation projects. While substantial, this is not nearly enough to address the overall need.

As new funding options are proposed and examined, significant differences in viewpoints have emerged, and in many cases these are based on demographic factors such as age. Americans also are reexamining the basis of decisions about where they live, work and play, and how that impacts their transportation preferences. Most importantly, Americans understand that funding our transportation infrastructure is critical to job creation, economic viability, mobility and safety.

As various concerns and solutions are evaluated, HNTB Corporation continues to encourage dialogue and discussion among industry professionals, elected and appointed officials and the general public by asking "What do you think?" as part of its America THINKS survey series.

In 2016, HNTB conducted three national surveys that studied issues associated with funding and mobility, transit oriented development, congestion and tolling. The results are compiled within this document.

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Unless otherwise noted, these experts can comment on trends affecting all modes of transportation. For more expert bios and additional information, visit news.hntb.com.

2016 America THINKS Survey Results

TABLE OF CONTENTS

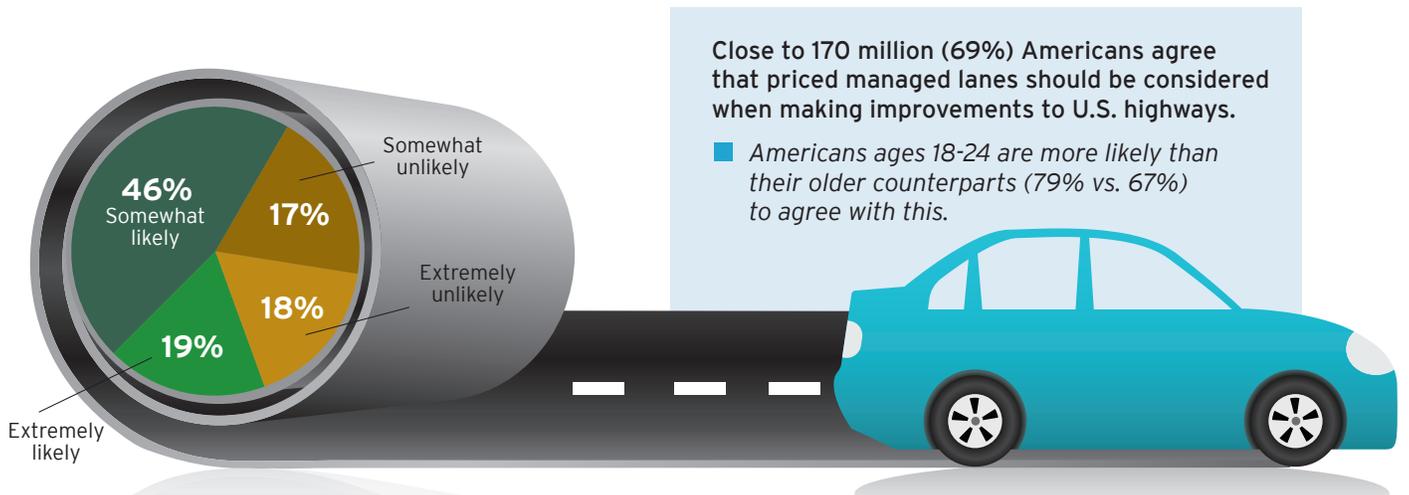
Americans say road usage fees best way to pay for transportation infrastructure (April).....	5
Americans overwhelmingly favor changes in land use and zoning regulations that encourage transit oriented development (May)	7
Highway congestion drives support for tolls (September)	9

AMERICANS SAY ROAD USAGE FEES BEST WAY TO PAY FOR TRANSPORTATION INFRASTRUCTURE

There is growing recognition that new revenue generating alternatives such as road usage fees including vehicle miles traveled, mileage-based user fees and priced managed lanes are needed to help pay the costs of maintaining and building our transportation infrastructure. This demonstrates Americans understand a fundamental shift in funding infrastructure is taking place. Yet the use of traditional approaches such as federal gasoline taxes, property and sales taxes remain.

PAYING FOR INFRASTRUCTURE

Nearly 160 million Americans (65 percent) would be likely to support a vehicle miles traveled system or mileage-based user fee to help fund transportation needs, a significant increase from 2014 when 50 percent of the nation would be supportive of this. And, almost 170 million (69 percent) Americans agree that priced managed lanes should also be considered for this purpose.



TAXES VERSUS FEES

Overall, more than half (55 percent) of Americans would rather pay higher taxes to maintain and build local roads, bridge and tunnels over the next ten years.

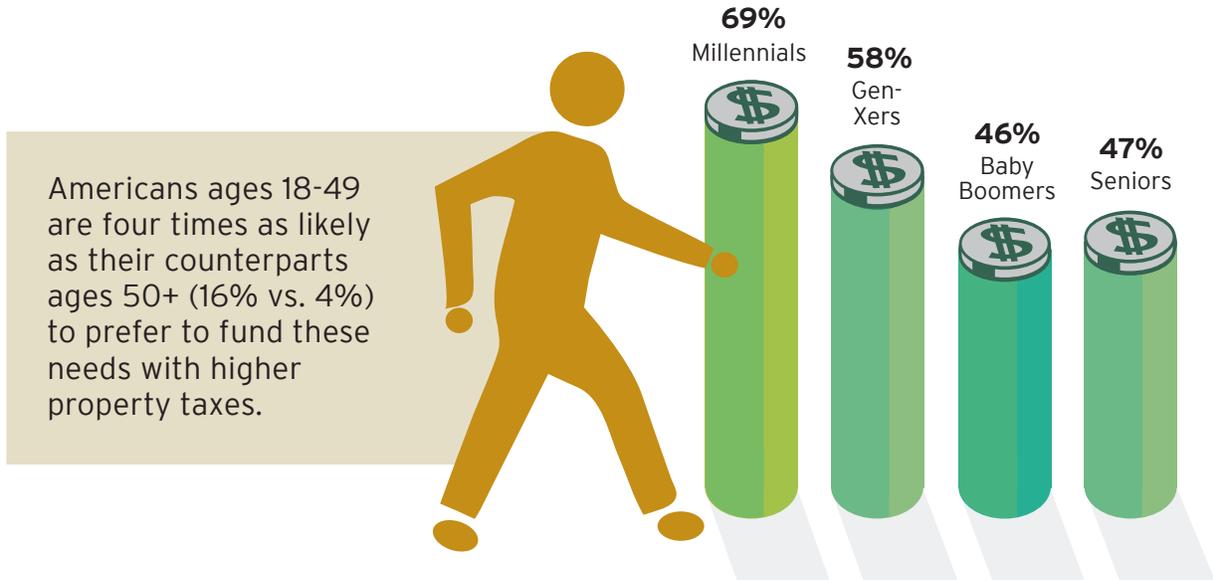
How would you prefer to pay to maintain and build local roads, bridges, and tunnels over the next 10 years?



Millennials (68%) are more likely than gen-Xers (58%), baby boomers (43%) or seniors (51%) to prefer to pay increased taxes than user fees that are in place of gas tax to maintain and build these transportation infrastructures. And more millennials (25%) and gen-Xers (21%) than baby boomers (14%) would opt to pay for this with higher sales taxes.

DIFFERENT PERSPECTIVES

Generational differences between millennials and generation X-ers versus baby boomers and seniors are beginning to emerge in how best to fund infrastructure costs over the next ten years.



OBTAINABLE CONNECTED TECHNOLOGY IS A MUST FOR CAR CONSUMERS

Two-thirds (67 percent) of Americans who plan to buy or lease a vehicle feel the availability and affordability of connected vehicle technologies are important. Among millennials and generation X-ers, 73 percent agree this technology is important versus 58 percent of older Americans.

How important would the availability and affordability of connected vehicles be when leasing or purchasing your next vehicle?*



HNTB's America THINKS Transportation Mobility 2016 survey was conducted by Kelton Global among 1,002 nationally representative Americans ages 18 and over between March 14 and March 22, 2016. The margin of error is +/- 3.1 percent. For more information, visit www.hntb.com or contact David Fridling (917) 438-0900, dfridling@hntb.com

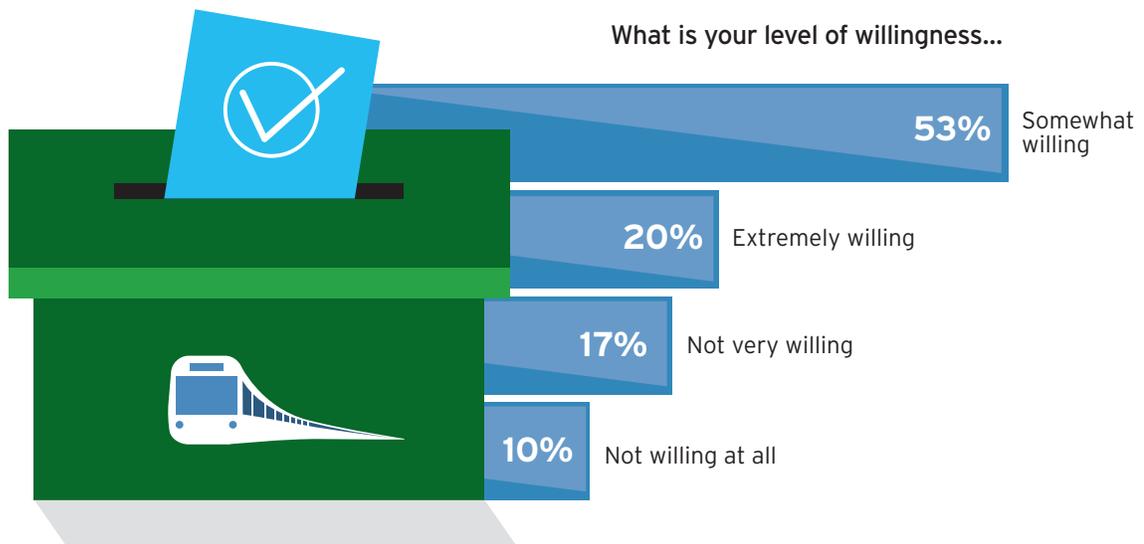
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VALUE OF INTEGRATING LIFESTYLE AND MOBILITY RECOGNIZED

Americans increasingly support transit oriented development. They value the opportunity to more fully integrate lifestyle with mobility options, and they are rethinking priorities when deciding where to live and how to travel for work and play. Evidence of this trend includes support for changes in land use and zoning regulations in their communities and a willingness to pay more for mortgages or rent to live near transit stations, along with a growing desire to live near transit stations.

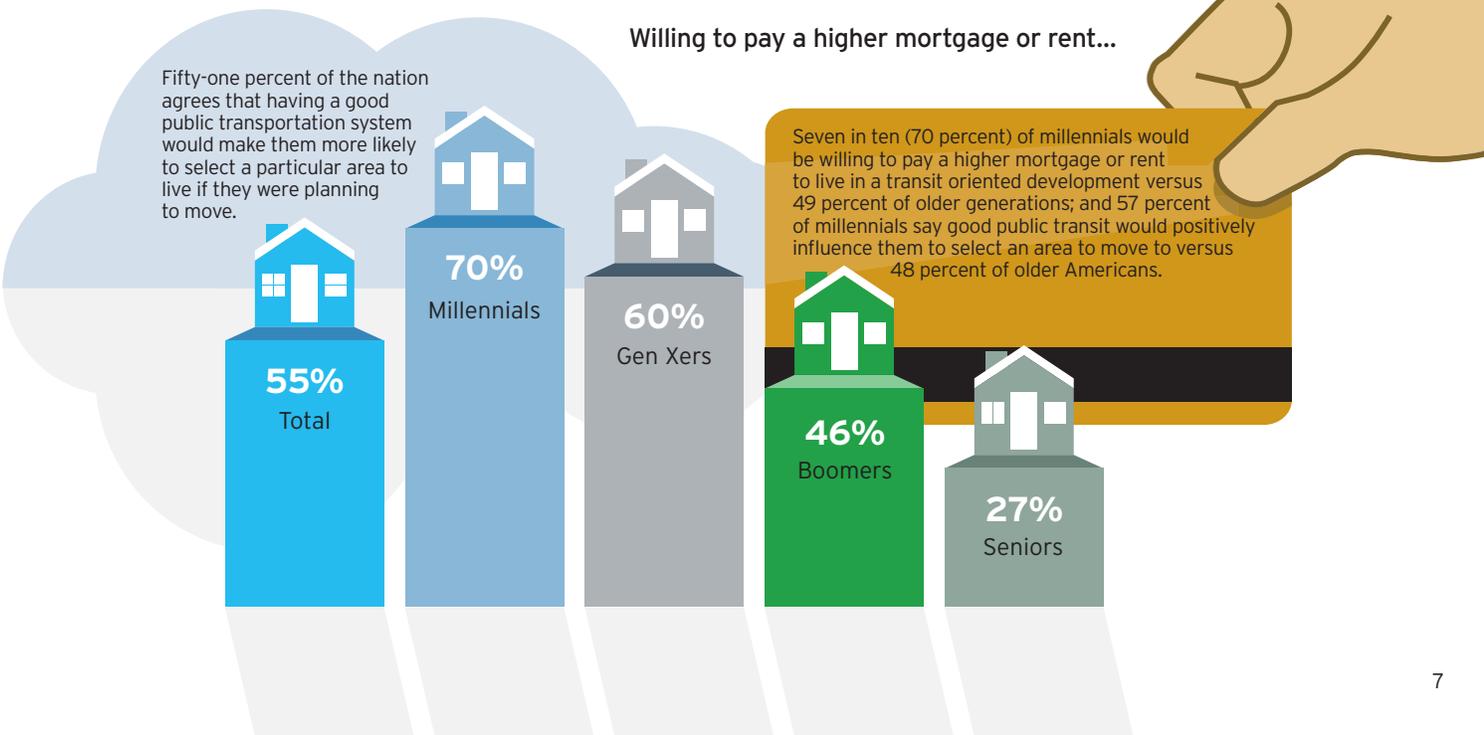
AMERICANS SUPPORT TRANSIT ORIENTED DEVELOPMENT

The desire for convenient transportation is why nearly three in four (73 percent) of Americans would support changing land use or zoning regulations in their communities to encourage transit oriented development.



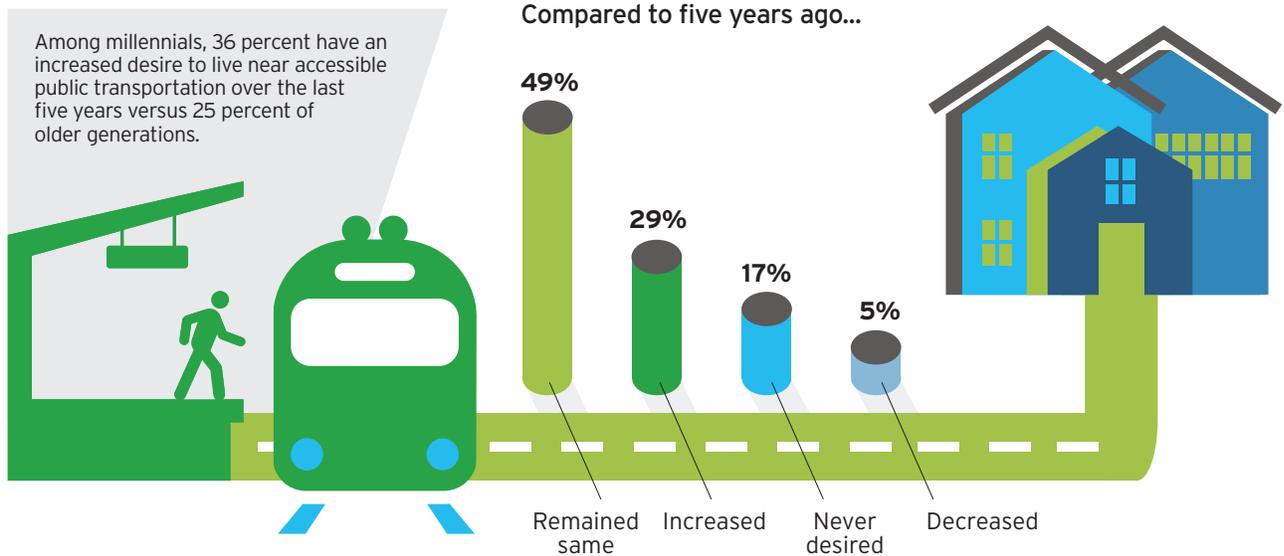
WILLING TO PAY FOR PROXIMITY

More than half (55 percent) of Americans would be willing to pay a higher mortgage or rent to live in an area where they could get to places for work and play without using a vehicle.



GROWING DESIRE TO LIVE NEAR PUBLIC TRANSPORTATION

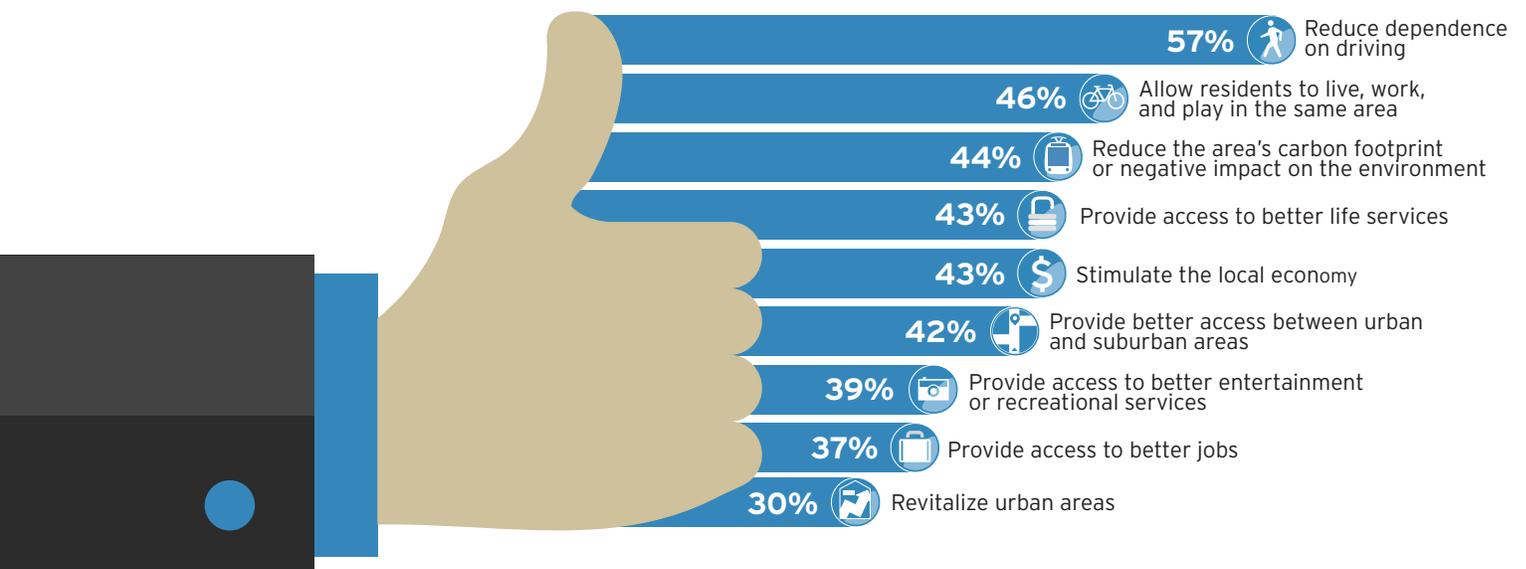
The desire to live near public transportation has increased in the last five years among 29 percent of Americans.



BENEFITS OF TRANSIT ORIENTED DEVELOPMENT

Americans believe transit oriented development provides an array of benefits ranging from lifestyle to environmental to economic.

Which of the following do you think would be true...



HNTB's America THINKS "Transit Oriented Development in America" survey polled a random nationwide sample of 1,002 Americans between April 6 and April 13, 2016. It was conducted by Kelton Global, which used an e-mail invitation and online survey. Quotas were set to ensure reliable and accurate representation of the entire U.S. population ages 18 and over. The margin of error is +/-3.1 percent. For more information, visit www.hntb.com or contact David Fridling (917) 438-0900, dfridling@hntb.com

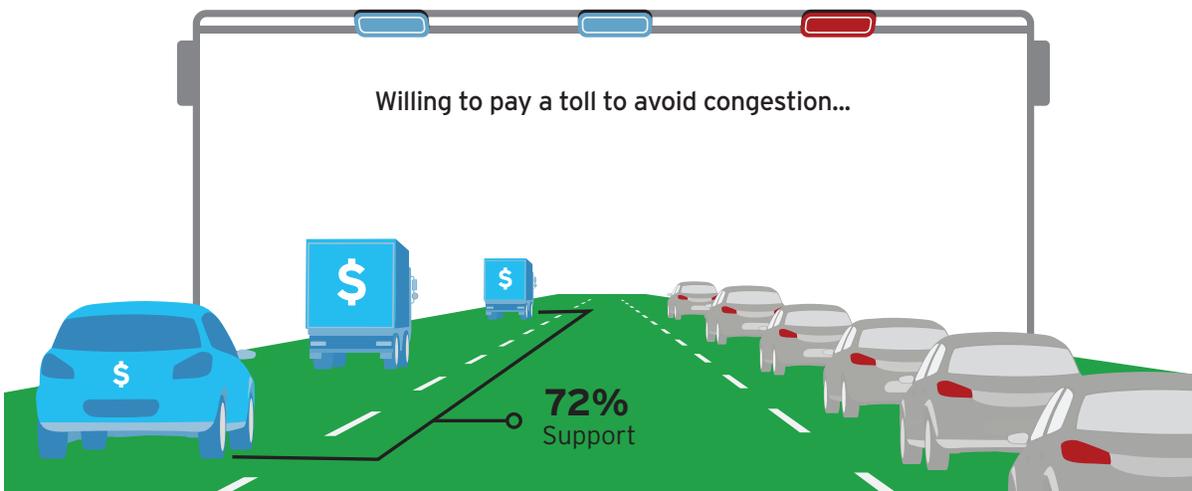
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HIGHWAY CONGESTION DRIVES SUPPORT FOR TOLLS

From too many cars on the road to older infrastructure in need of reconstruction, driving on highways and interstates creates many challenges when trying to get from one place to the next. To help ease these pain points, many Americans say they are willing to pay tolls to help maintain the nation's roads and highways, guarantee trip time and improve their mobility. The findings of a new HNTB survey demonstrate Americans support tolls to pay for needed transportation infrastructure projects and understand that doing so provides direct benefits.

AMERICANS BELIEVE TOLLS COULD HELP REDUCE CONGESTION

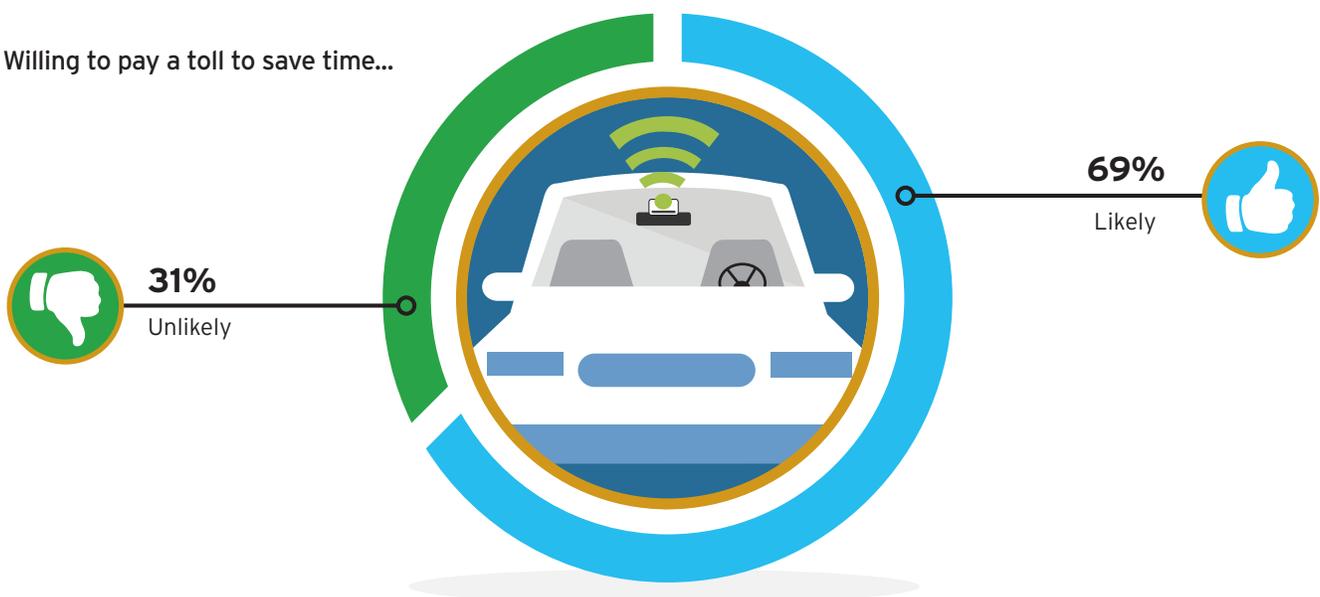
With Americans facing daily congestion on highways, nearly three in four (72 percent) would support tolls to fund needed transportation projects that could reduce their time stuck in traffic, if there are inadequate funds from other sources.



PAY A TOLL TO SAVE TIME

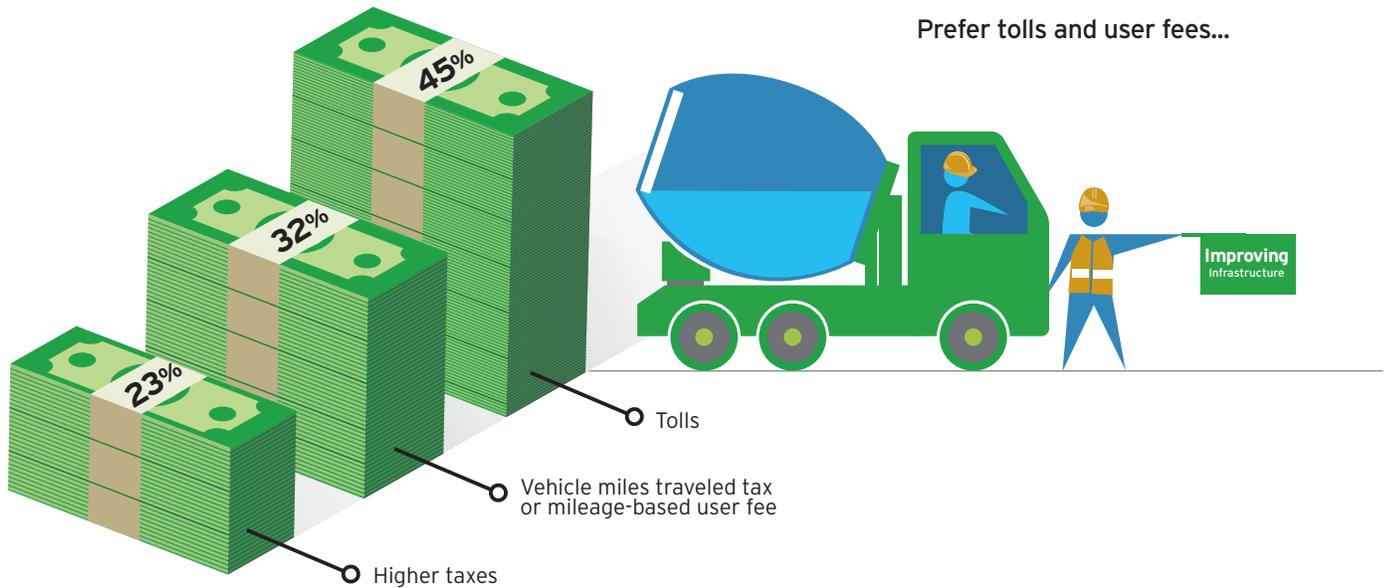
Frustrated with congestion, Americans would likely use a tolled highway over a free alternative if they knew it could save time and avoid being stuck in traffic.

Willing to pay a toll to save time...



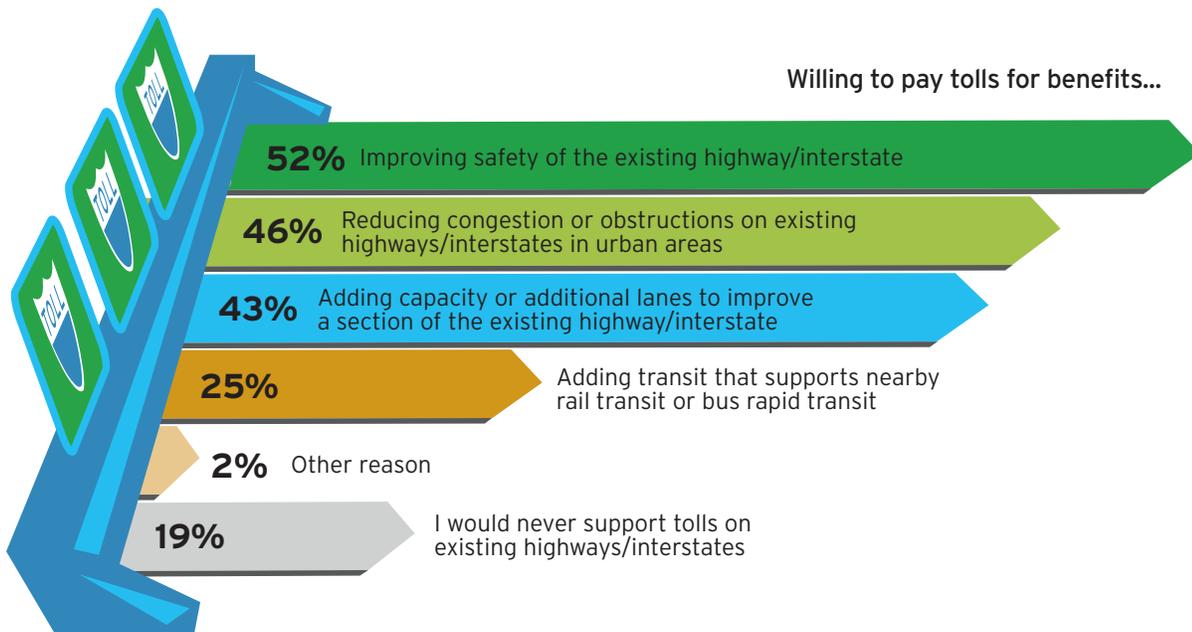
TOLLS AND MILEAGE-BASED USER FEES, OR HIGHER TAXES

Most Americans say they prefer tolls and mileage-based user fees, not higher taxes, as the way to fund needed infrastructure over the next ten years.



PAYING A TOLL OFFERS BENEFITS

Almost three in five (61 percent) Americans have driven on a tolled facility in the past year. And 81 percent of these consumers have at least one reason why they would support tolls on existing highways.



HNTB's America THINKS: "Tolling 2016" survey polled a random nationwide sample of 1,022 Americans between July 21 and July 28, 2016. It was conducted by Kelton Global, which used an e-mail invitation and online survey. Quotas were set to ensure reliable and accurate representation of the entire U.S. population ages 18 and over. The margin of error is +/-3.1 percent. For more information, visit www.hntb.com or contact David Fridling (917) 438-0900, dfridling@hntb.com.

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Additional resources

American Public Transportation Association

www.apta.com

American Association of State Highway and Transportation Officials

www.transportation.org

Intelligent Transportation Society of America

www.itsa.org

The American Road & Transportation Builders Association

www.artba.org

International Bridge, Tunnel and Turnpike Association

www.ibtta.org

Federal Highway Administration

www.fhwa.dot.gov

Voices for Public Transit

www.voicesforpublictransit.org

For more information on the America THINKS survey series, visit www.hntb.com/AmericaTHINKS or contact David Fridling, (917) 438-0900, dfridling@hntb.com.



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