



# America **THINKS** 2015: Compilation Americans' views on U.S. transportation



# Understanding the needs, recognizing the challenges and delivering innovative solutions for America's infrastructure

Americans have come to appreciate the often conflicting challenges created by increased demand on existing infrastructure that for years has not received adequate investment. They understand that emerging demands on an already over-burdened transportation network affect us all, and express a desire for improvements that will contribute to increased safety and convenience.

Understanding the value of pinpointing specific concerns and identifying potential solutions, HNTB Corporation encourages 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 2015, HNTB conducted multiple national and regional surveys about transit, emerging technologies, transportation investment and more. 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](http://news.hntb.com).*

# 2015 America THINKS Survey Results

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**PUBLIC TRANSPORTATION USAGE AT HIGH LEVELS – CAN BE EVEN HIGHER WITH SERVICE IMPROVEMENTS AND ADDED AMENITIES.**

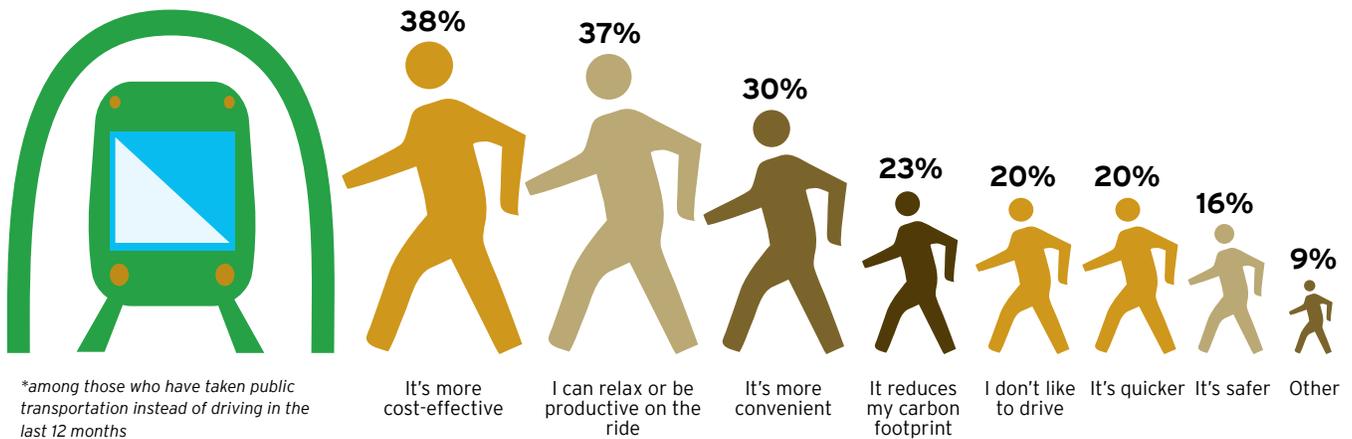
Today, two-thirds of Americans are using public transportation because they believe it provides benefits not available when driving. While public transportation use is at high levels, more people can be encouraged to ride if they are provided with service improvements and added amenities.

A new America THINKS survey by HNTB Corporation, a national infrastructure solutions firm, explores why Americans are using public transportation, what they like and don't like, and offers public transportation agencies some of their ideas that could increase ridership.

**WHY I LIKE THE RIDE**

Americans who use public transportation instead of driving appreciate the benefits they are able to enjoy, including more cost effective mobility, the opportunity to be productive while they are en route, and added convenience.

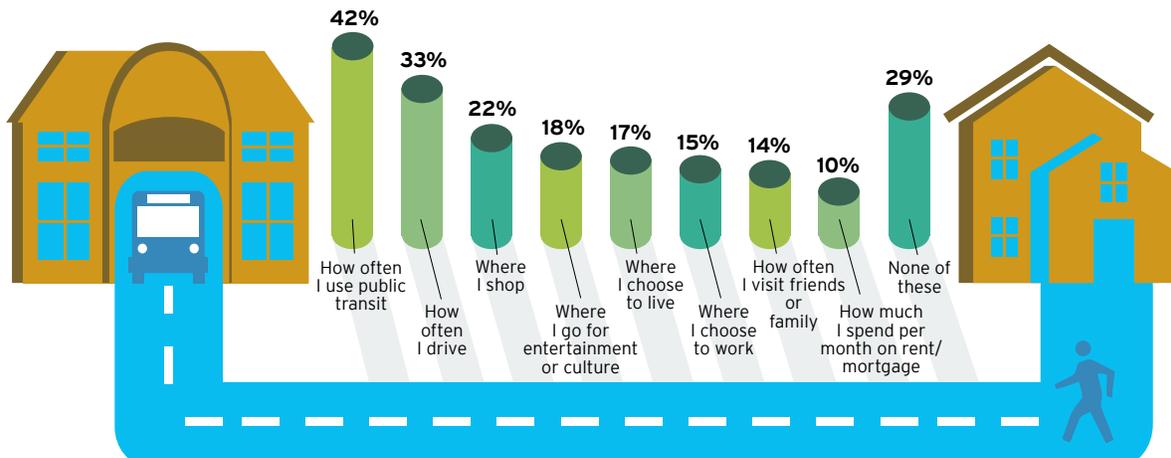
In the last 12 months, I've taken public transportation instead of driving because...\*



**LOCATION, LOCATION, LOCATION**

Living in close proximity to public transportation stations significantly affects the day-to-day decisions Americans make on how to get around as well as many other aspects of their lives such as where to shop, live and work.

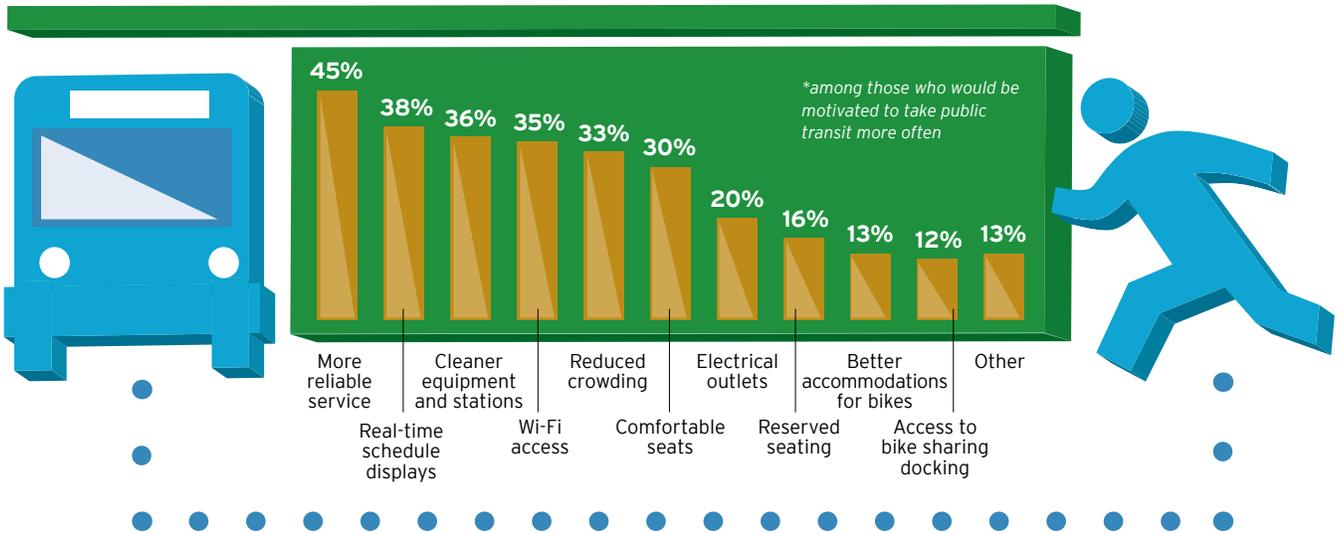
A public transportation station being in close proximity would impact...



## WHAT'S IN IT FOR ME?

More than 158 million Americans are now using public transportation, yet four in five (80 percent) say they could be motivated to use it even more.

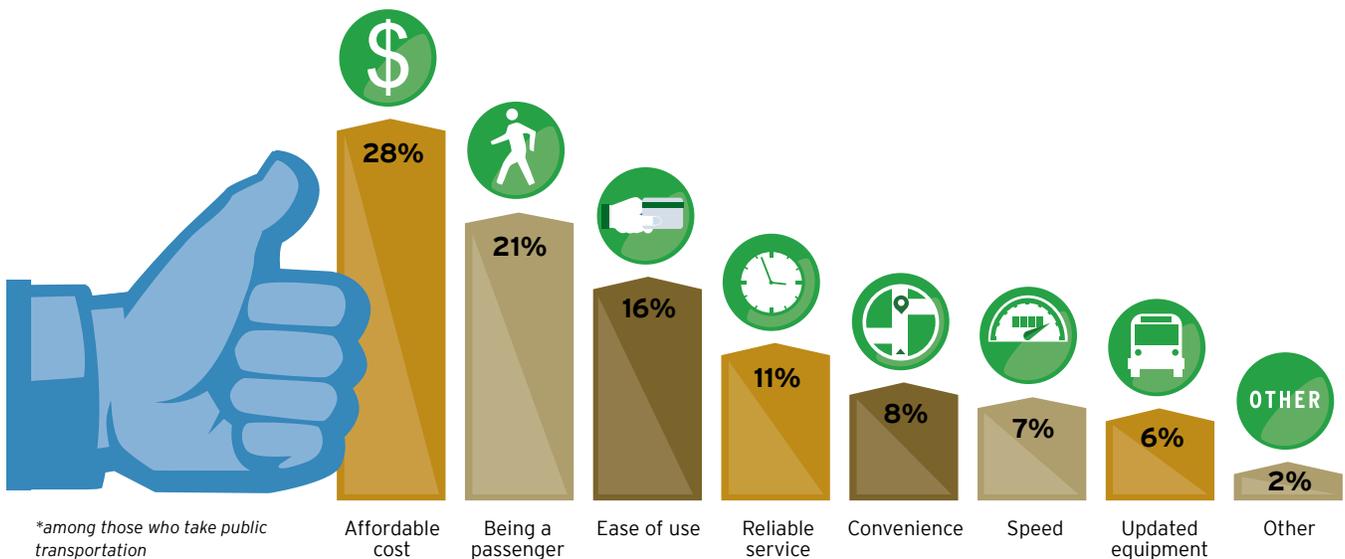
What would motivate you to take public transit more often?\*



## IT'S THE BEST THING

Americans who take public transportation like it because of the affordable cost, being a passenger and the ease of use.

The best thing about public transportation is ...\*



HNTB's America THINKS 2015 public transit survey polled a random nationwide sample of 1,002 Americans between September 15 and September 25. It was conducted by Kelton, 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](http://www.hntb.com) or contact David Fridling (917) 438-0900, [dfridling@hntb.com](mailto:dfridling@hntb.com)

## CHICAGO'S LOVE OF PUBLIC TRANSIT SHOWS SUPPORT FOR TRANSFORMATIVE INVESTMENTS

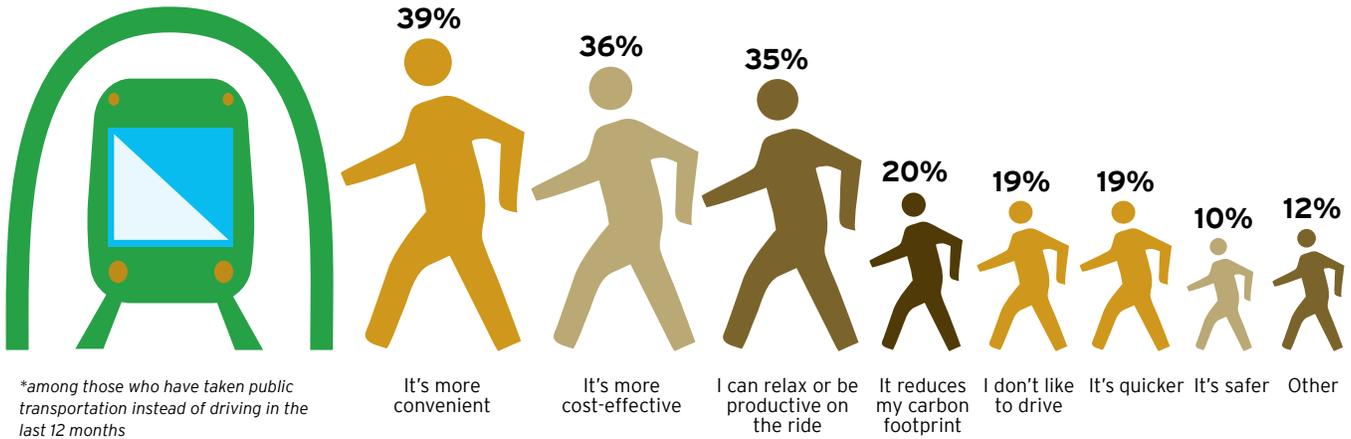
Today, more than three-quarters of Chicagoans are using public transportation. While public transportation use is at high levels, Chicagoans could be encouraged to ride even more.

A new America THINKS survey by HNTB Corporation, a national infrastructure solutions firm, explores why Chicagoans are using public transportation and why they like it, and offers public transportation agencies some of their ideas that could increase ridership.

### WHY I LIKE THE RIDE

Americans who use public transportation instead of driving appreciate the benefits they are able to enjoy, including more cost effective mobility, the opportunity to be productive while they are en route and added convenience.

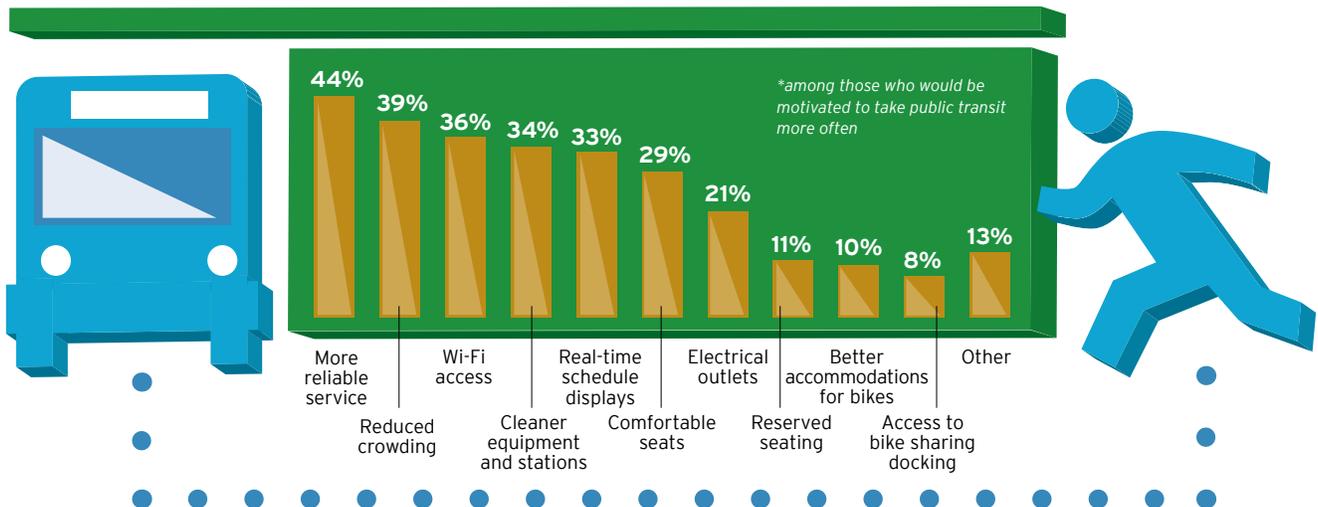
In the last 12 months, I've taken public transportation instead of driving because...\*



### SUPPORT FOR TRANSFORMATIVE INVESTMENTS

More than four in five Chicagoans (82 percent) say they could be motivated to increase their use of public transportation with changes in service, added amenities, updated facilities and more.

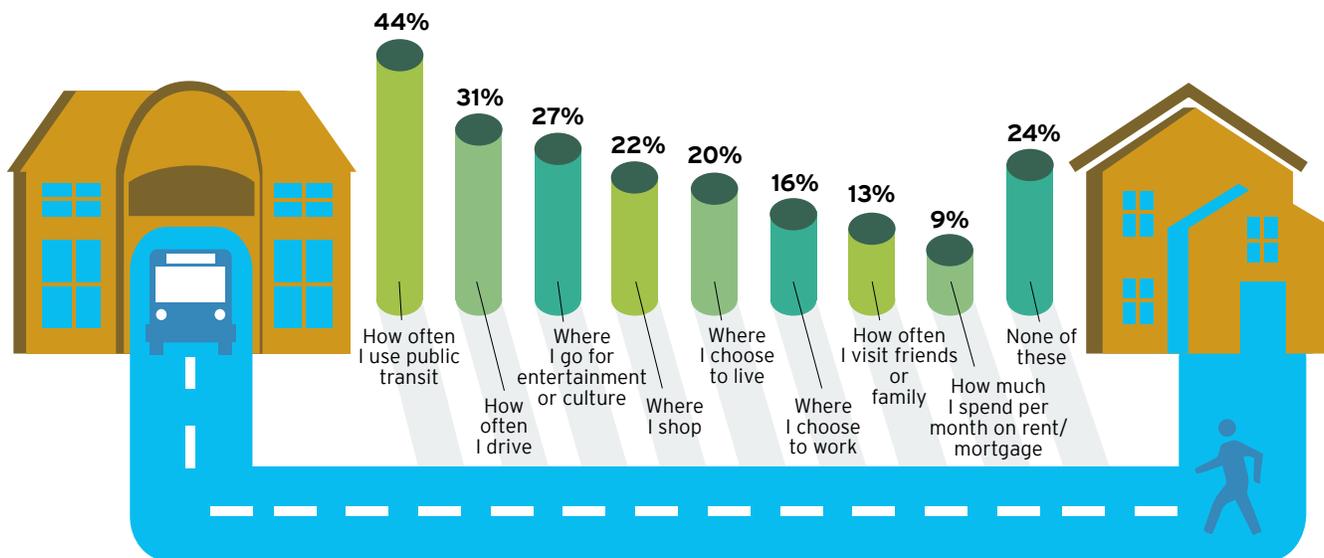
What would motivate you to take public transit more often?\*



## LOCATION, LOCATION, LOCATION

Living in close proximity to public transportation stations significantly affects the day-to-day decisions Chicagoans make on how to get around as well as many other aspects of their lives such as where to shop, live and work.

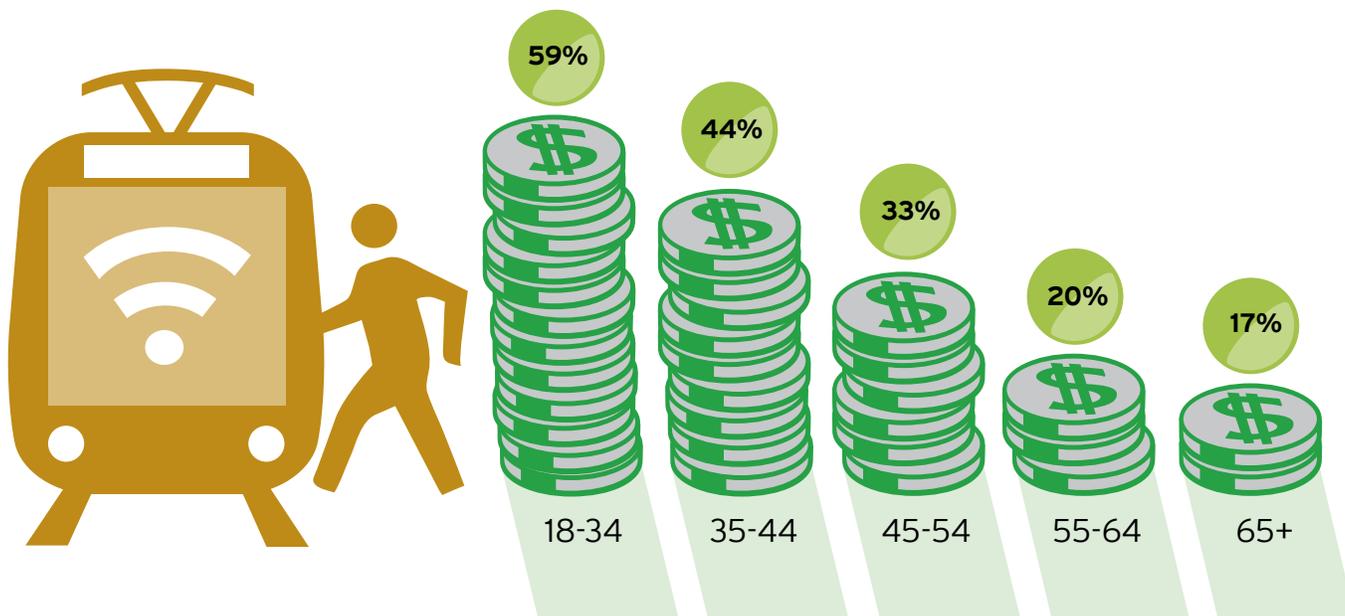
A public transportation station being in close proximity would impact...



## CONVENIENCE IS KING

Chicagoans are eager for the public transportation they use to continue to improve and make their lives more convenient...and they are willing to pay for that convenience.

Chicagoans who would pay to ensure online connectivity if Wi-Fi was available on public transit, by age:



HNTB's America THINKS 2015 public transit Chicago survey was conducted by Kelton Global between Sept. 15 and 25, among 1,000 Chicago residents ages 18 and over, using an e-mail invitation and online survey. The margin of error is +/- 3.1 percent. For more information, visit [www.hntb.com](http://www.hntb.com) or contact Sara Prem (816) 527-2258, [sprem@hntb.com](mailto:sprem@hntb.com).

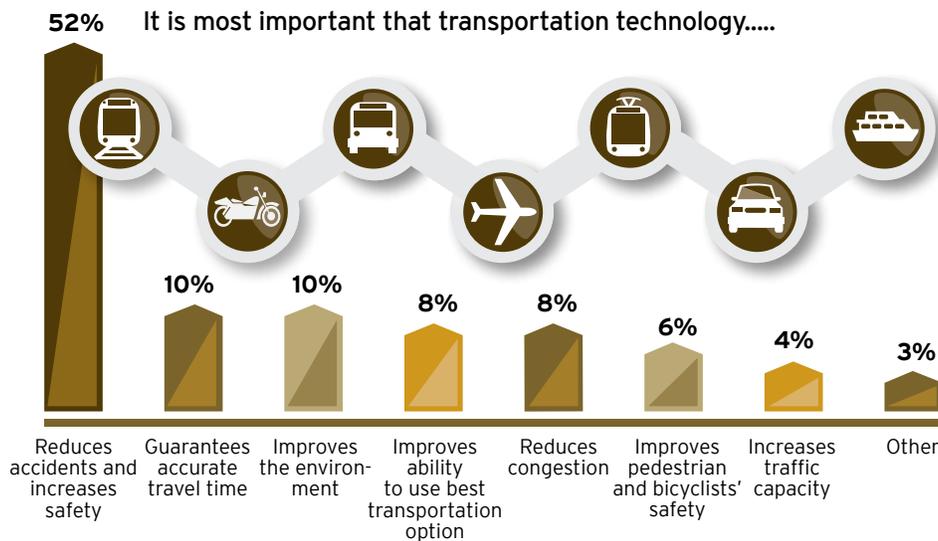
## TECHNOLOGY-DRIVEN TRANSPORTATION INNOVATION – DEMAND FOR SAFETY, CONCERN FOR PERSONAL PRIVACY

New developments in transportation technology are impacting expectations of Americans on many levels. Technologies are now offering an array of information about traffic congestion, routing options and more, yet Americans across the nation have one common desire for transportation technology: safety.

A new America THINKS survey by HNTB, a national infrastructure solutions firm explores public beliefs about these new technologies - what they should be providing and the potential concerns these very technologies also create.

### SAFETY FIRST

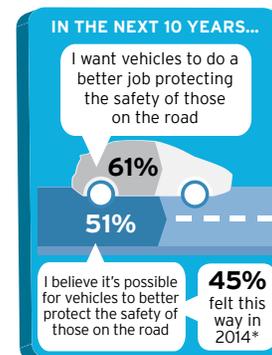
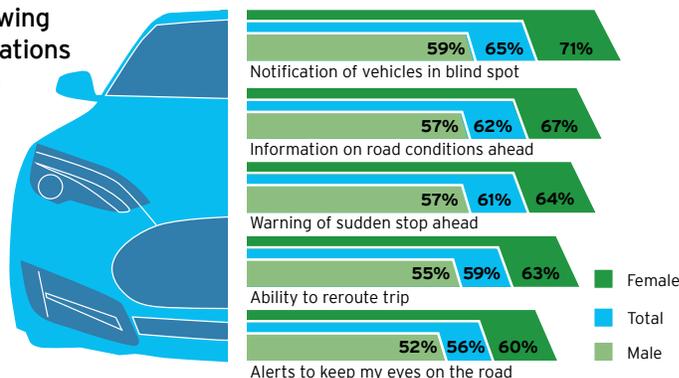
Most Americans are eager for technology enhancements that will improve their transportation safety, either as drivers or passengers. The majority of Americans believe the most important function of technology is to reduce accidents or make conditions safer. People are far less likely to prioritize their personal convenience.



### INFORMATION AND SAFETY

For many Americans, transportation safety and information are closely tied. They are eager for technology on board their vehicles to provide an array of information about road conditions. Interestingly, more women than men desire these features in their cars. Americans are increasingly optimistic they will see these advancements within the next ten years.

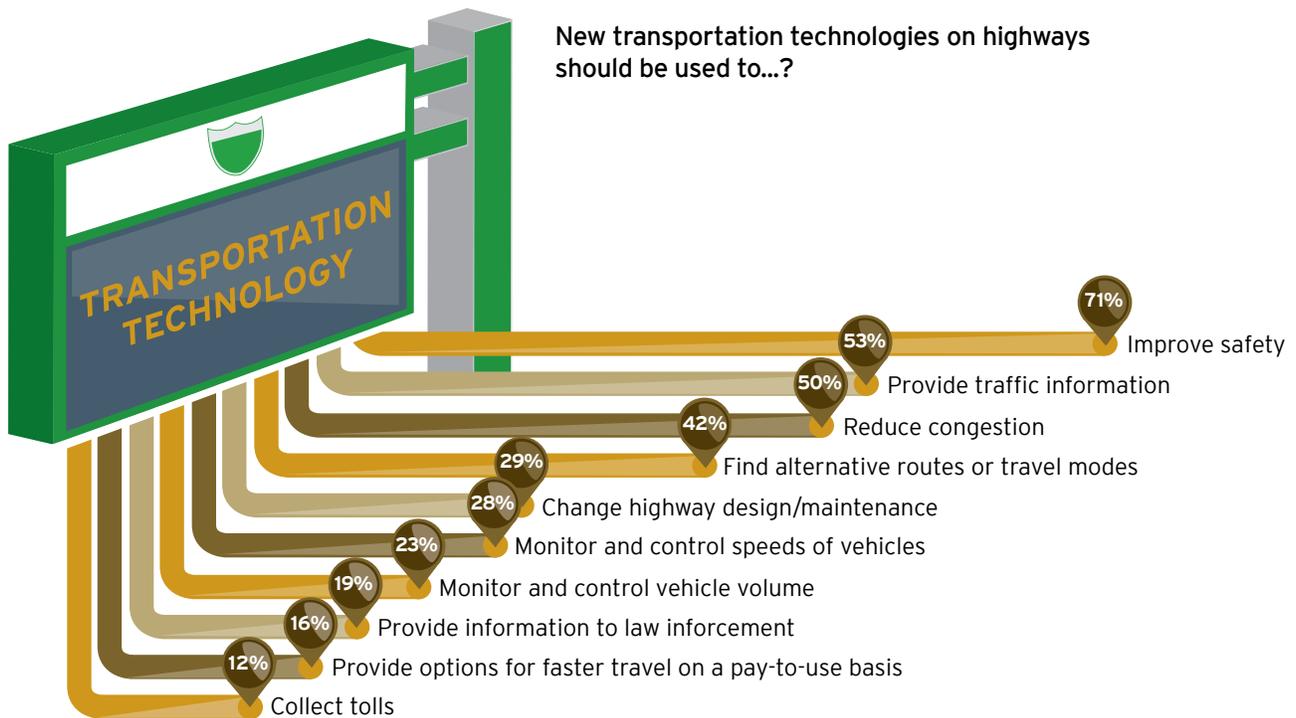
Which of the following technology applications would you want in your vehicle?



\*America THINKS conducted in June 2014 among 1,042 nationally representative Americans ages 18 and over

## USING TECHNOLOGY

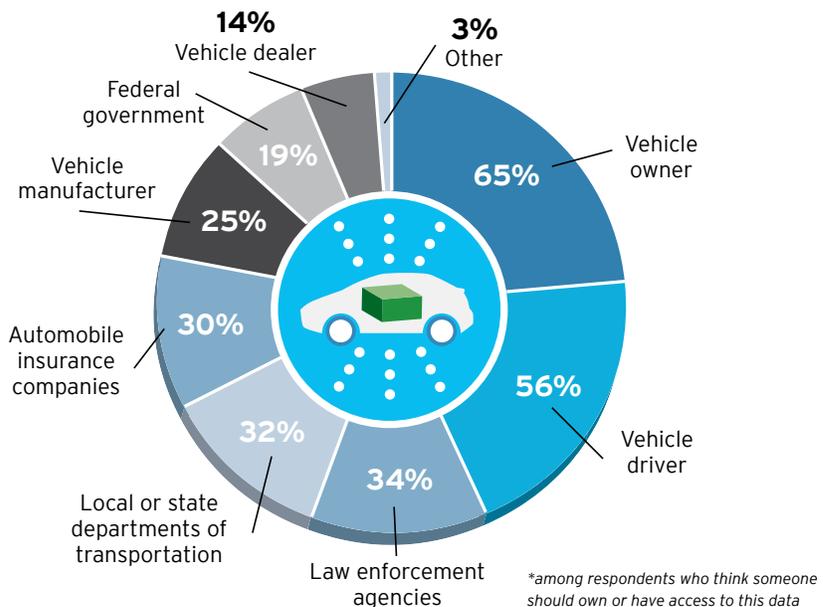
Americans are eager for advancements that create more informed travelers. In fact, people want to see technology that will improve safety, provide information about road conditions, and help reduce road congestion.



## WHO WANTS TO KNOW?

While connected vehicles have the potential to generate a great deal of data and information, Americans are hesitant to share. However, they indicate a willingness to re-evaluate their privacy concerns if they feel the data and information positively impacts their safety or budgets.

**Access to the data generated by connected vehicles should be given to....?**



HNTB's America THINKS 2015 transportation technology survey polled a random nationwide sample of 1,007 Americans between June 29 and July 13. It was conducted by Kelton, 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](http://www.hntb.com) or contact David Fridling (917) 438-0900, [dfridling@hntb.com](mailto:dfridling@hntb.com)

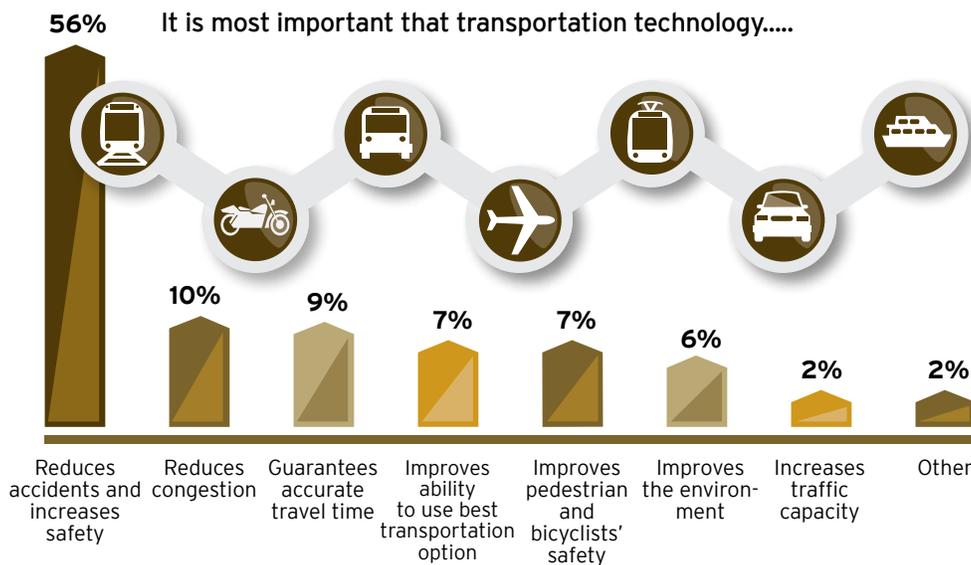
## TECHNOLOGY-DRIVEN TRANSPORTATION INNOVATION – DEMAND FOR SAFETY, CONCERN FOR PERSONAL PRIVACY

New developments in transportation technology are impacting expectations of Americans on many levels. Technologies are now offering an array of information about traffic congestion, routing options and more. Central Floridians have one common desire for transportation technology: safety.

A new survey by HNTB, a national infrastructure solutions firm with offices throughout Florida, explores public beliefs about these new technologies and what they should provide.

### SAFETY FIRST

Most central Floridians are eager for technology enhancements that will improve their transportation safety, either as drivers or passengers. The majority of them believe the most important function of technology is to reduce accidents or make conditions safer. People are far less likely to prioritize their personal convenience.



### INFORMATION AND SAFETY

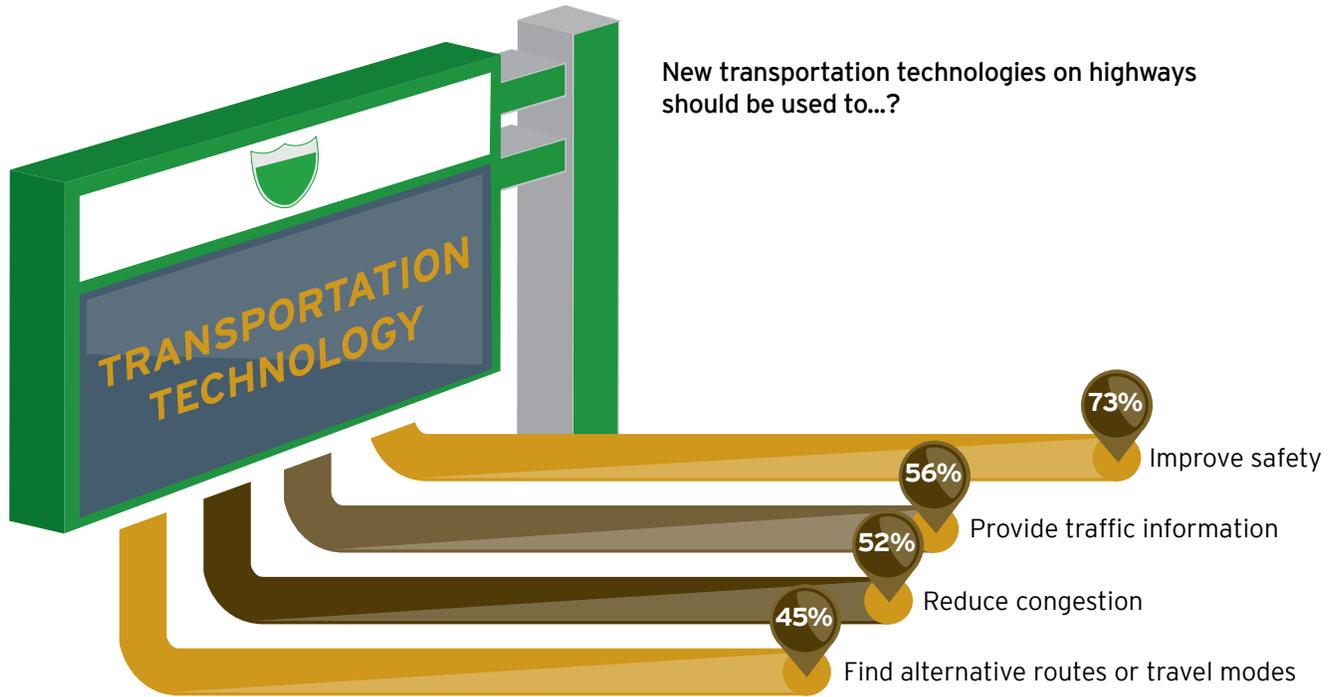
For many central Floridians, transportation safety and information are closely tied. People are eager for technology on board their vehicles to provide an array of information about road conditions. Americans are increasingly optimistic they will see these advancements within the next ten years.

Which of the following technology applications would you want in your vehicle?



## USING TECHNOLOGY

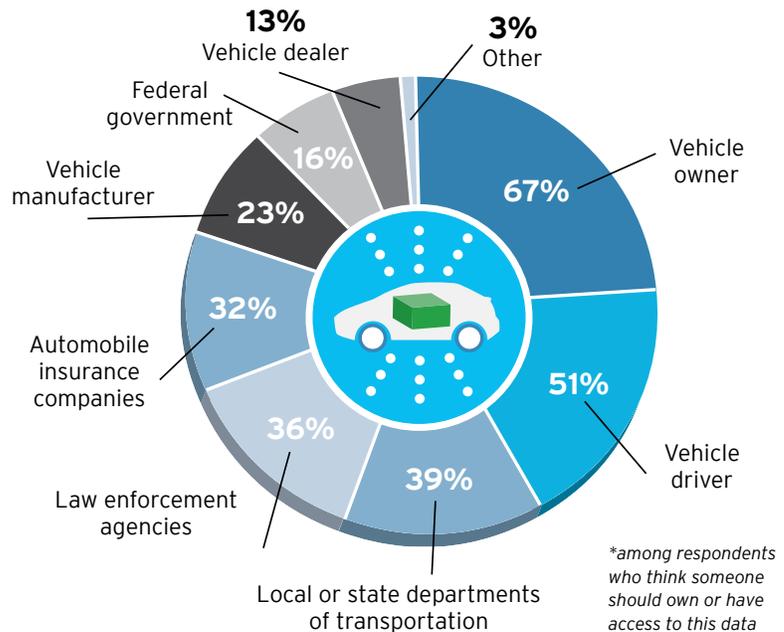
Central Floridians are eager for advancements that create more informed travelers. In fact, people want to see technology that will improve safety, provide information about road conditions, and help reduce road congestion.



## WHO WANTS TO KNOW?

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**Access to the data generated by connected vehicles should be given to....?**



HNTB's America THINKS 2015 transportation technology survey polled a random nationwide sample of 815 Central Florida residents between June 29 and July 13. It was conducted by Kelton, 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 +/- 3.4 percent. For more information, visit [www.hntb.com](http://www.hntb.com) or contact Lydia Steinberg (816) 527-2324, [ldsteinberg@hntb.com](mailto:ldsteinberg@hntb.com).

## CONNECTIVITY AND EFFICIENCY UPGRADES WOULD SPUR MORE DRIVERS TO CHOOSE TRANSIT

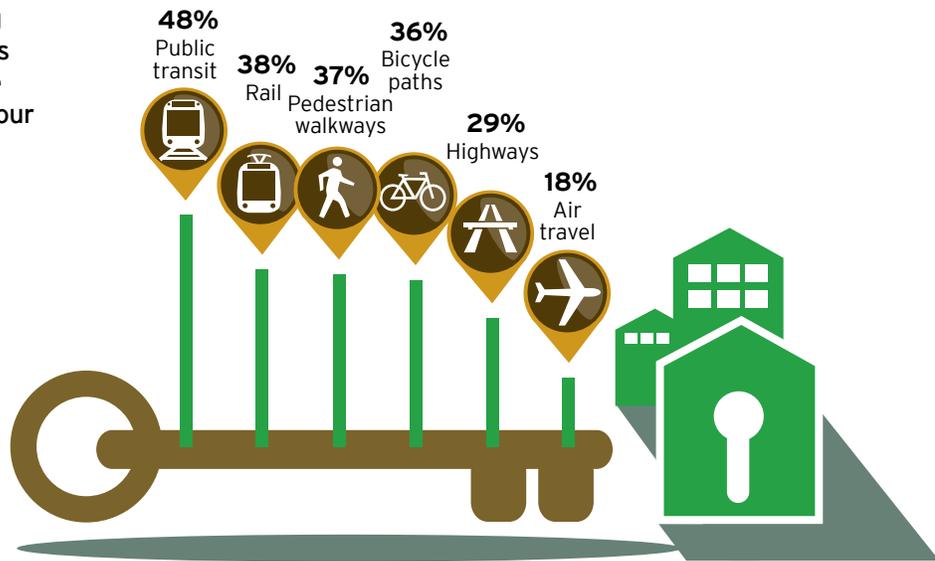
Most residents seek improvements and a more seamless transportation experience

HNTB Corporation's latest America THINKS survey asked residents of the region - including Los Angeles, San Bernardino, Orange, Riverside, San Diego, Ventura, Santa Barbara and Imperial counties - for their opinions on its entire transportation infrastructure.

### MOBILE ACCESSIBILITY

Southern California residents want a more accessible and efficient transportation system. More than 4 in 5 (84 percent) would like to have greater access to local transportation options. Many desire better access to public transit (48 percent) and rails (38 percent).

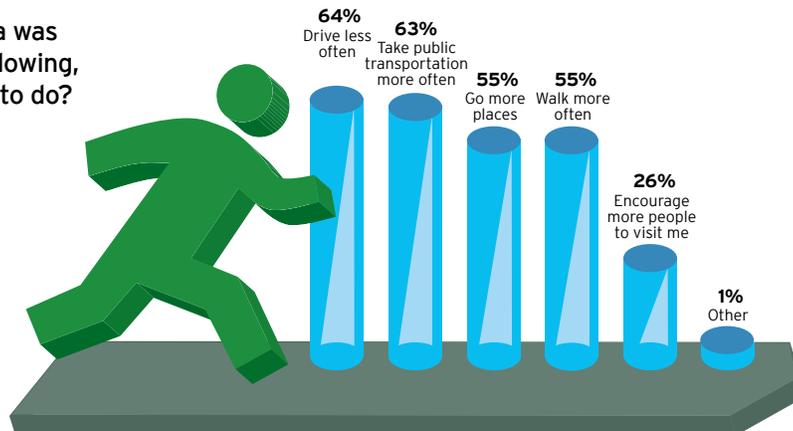
Which of the following transportation choices would you like to have greater access to in your community?



### SWITCHING GEARS

Seamless local mobility would result in nearly 9 in 10 (87 percent) Southern Californians changing their transportation behaviors. Nearly two-thirds (64 percent) would reduce their driving, some would hop onto public transportation (63 percent) or walk (55 percent) more often. And 26 percent would even encourage more people to visit.

If the mobility in your area was seamless, which of the following, if any, would you be likely to do? I would...

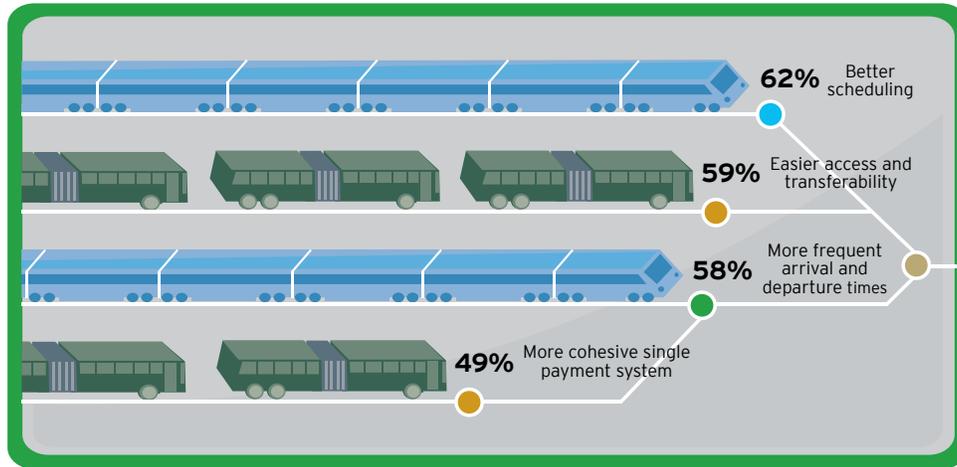


\*among respondents who would change their actions if local mobility was seamless

## ALL TOGETHER NOW

More than 8 in 10 (83 percent) Southern California residents think local modes of transportation need to be improved in order to work together in a more efficient way.

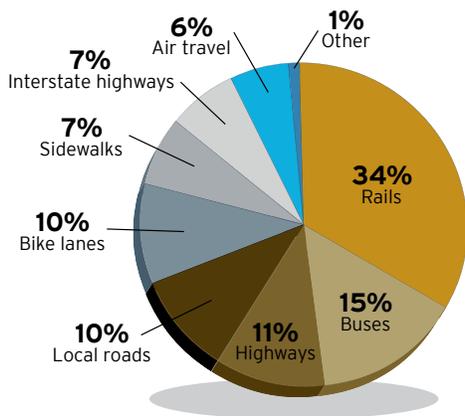
Which of the following, if any, need to be improved to make the various modes of transportation in your area work together in a more efficient way?



## WORTH THE MONEY

Three in 4 (75 percent) Southern Californians would fork over their own money to have a better travel experience. More than one-third (34 percent) of this group would be most willing to spend more to use rails for this reason, while buses come in second (15 percent).

Which of the following modes of transportation in your local area, if any, would you be most willing to pay more for if you knew it would improve your travel experience?

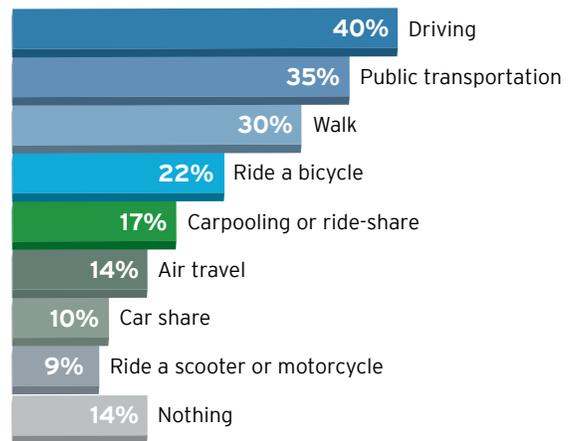


*\*among those Southern Californians who think something needs to be improved to make various modes of transportation in their area work together more efficiently*

## FUTURE TRAVELS

Many Southern California residents believe they will be driving vehicles (40 percent) and riding public transportation (35 percent) more in the next five years. Some think by 2020 they also will be walking (30 percent) and riding bikes (22 percent) more to their destinations.

When thinking about the next five years, which of the following, if any, do you think you will do more of in order to get places?



HNTB's Southern California transportation survey was completed May 4-11, 2015, among 1,037 Americans who live in Southern California, including Los Angeles, San Bernardino, Orange, Riverside, San Diego, Ventura, Santa Barbara and Imperial counties, using an email invitation and online survey. It was conducted by Kelton, which set quotas to ensure reliable and accurate representation of total Southern California population ages 18 and over. The margin of error is +/- 3 percent. For more information, visit [www.hntb.com](http://www.hntb.com) or contact Brian Cox, (816) 527-2056, [brcox@hntb.com](mailto:brcox@hntb.com).

## BUILDING THE ROAD TO WORK

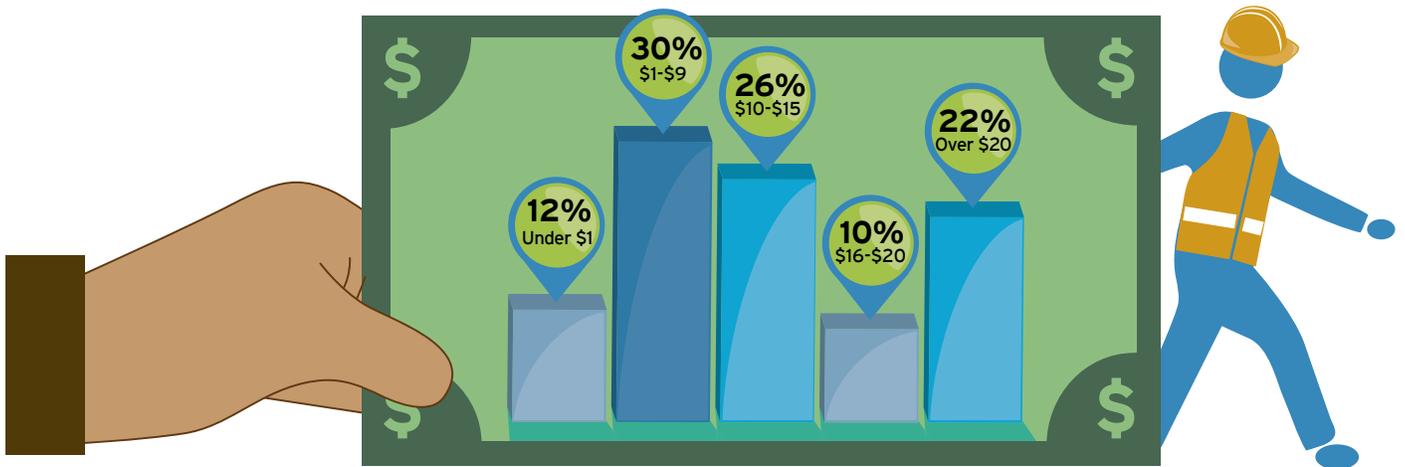
Millions of Americans see investing in transportation infrastructure as paving the way to an improved U.S. economy

A national America THINKS survey from infrastructure firm HNTB examines the public's views on the value funding infrastructure provides in creating construction jobs and helping drive economic development.

### JOB SUPPORT

Four in 5 (80 percent) Americans would shell out money if it went directly toward creating thousands of jobs in the United States. These people would be willing to put an average of \$11 each month toward the cause. Nearly 1 in 4 would spend more than \$20 a month to make this happen.

If the money went directly toward creating thousands of jobs in U.S., I would spend....\*



\*among the 4 in 5 respondents willing to spend money if it went directly toward creating thousands of jobs in U.S.

### ENDING EMPLOYMENT

What's more, many Americans would invest their own money toward creating construction jobs. More than 9 in 10 (91 percent) Americans ages 18-24 would invest \$2.50 each week versus 73 percent of those ages 25+.

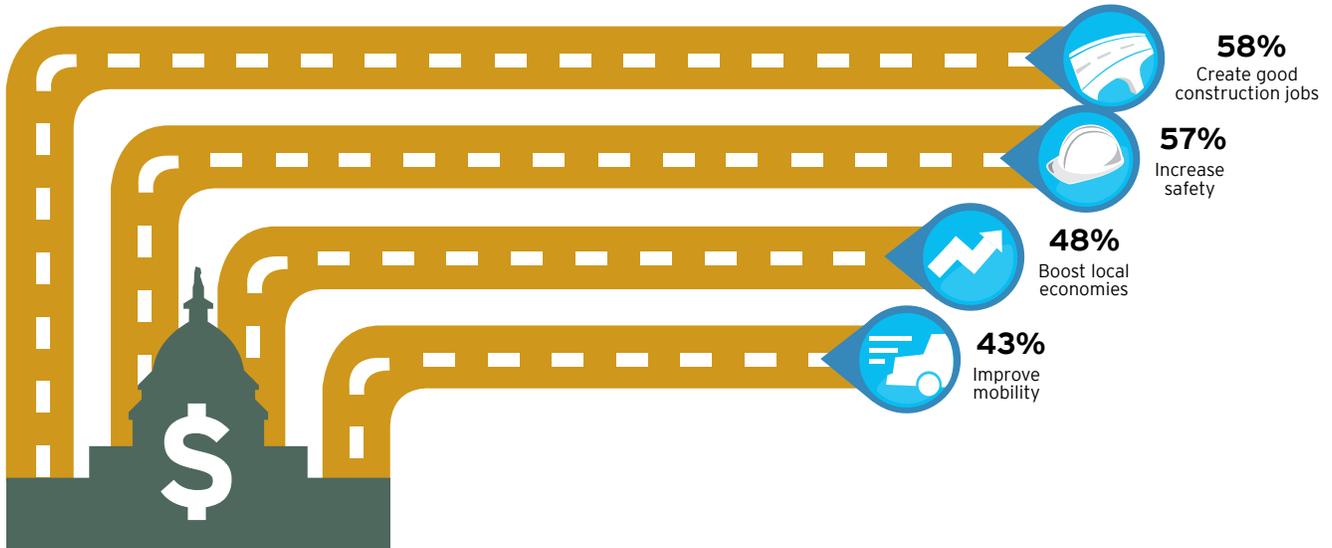
Three-quarters (75%) of the nation would be willing to pay \$2.50 a week to put 400,000 Americans to work in full-time construction jobs with benefits.



## GENERATING BENEFITS

Many Americans see infrastructure investment as having multiple benefits, including not only the creation of good construction jobs (58 percent), but increased safety (57 percent), boosting local economies (48 percent) and improved mobility (43 percent).

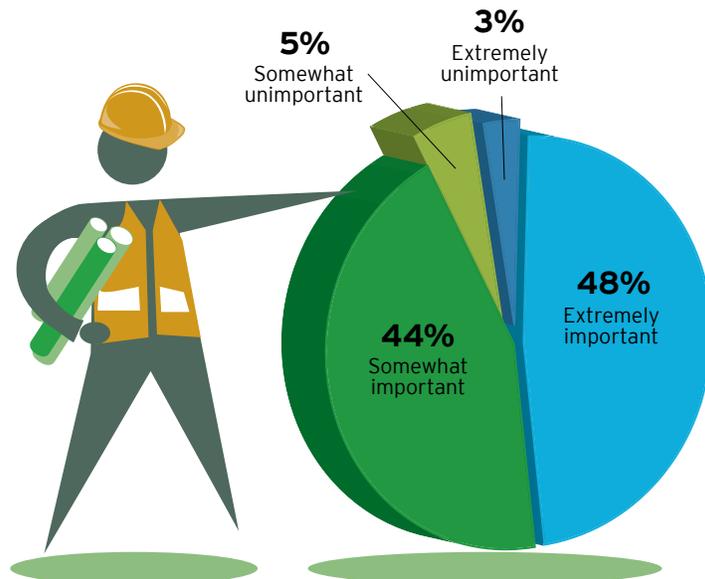
A direct result of the United States investing in transportation infrastructure would be:



## A MUST-HAVE

In fact, more than 9 in 10 (93 percent) Americans agree that it's important for the United States to create construction jobs; nearly half (48 percent) of the nation believes this is extremely crucial.

How important or unimportant is it for the U.S. to create construction jobs?



HNTB's America THINKS transportation and job creation survey polled a random nationwide sample of 1,013 Americans March 23-27, 2015. It was conducted by Kelton, which used an e-mail invitation and online survey. Quotas were set to ensure reliable and accurate representation of the total U.S. population ages 18 and over. The margin of error is +/- 3.1 percent. For more information, visit [www.hntb.com](http://www.hntb.com) or contact David Fridling (917) 438-0900, [dfridling@hntb.com](mailto:dfridling@hntb.com)

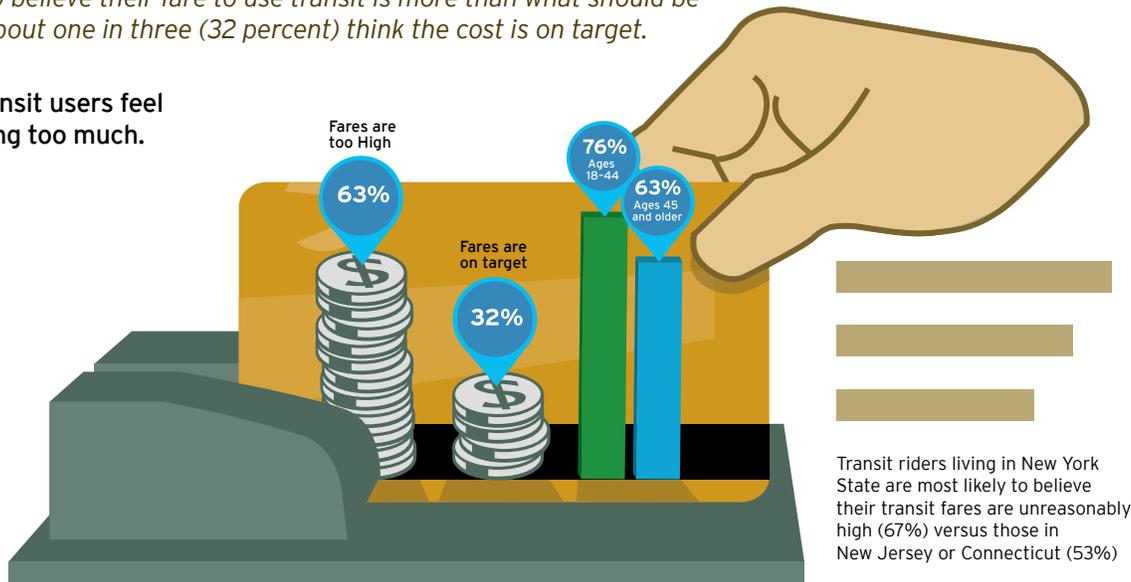
## TRI-STATE TRANSIT CONSUMERS BELIEVE THEIR FARES ARE UNFAIR

The tri-state New York City region's transit network requires significant funds to maintain its ability to serve its current customers. In addition, demand for transit in the region is increasing as is the need for expanded service to enable transit's ability to meet future expectations. The findings of a new HNTB commissioned survey finds residents in this region rely heavily on transit. The survey also finds many commuters believe their transit fares are designed to provide profit for transit systems.

### HIGH PRICE TAG

Most local transit users already feel they are paying too much. Over three in five (63 percent) believe their fare to use transit is more than what should be charged. Only about one in three (32 percent) think the cost is on target.

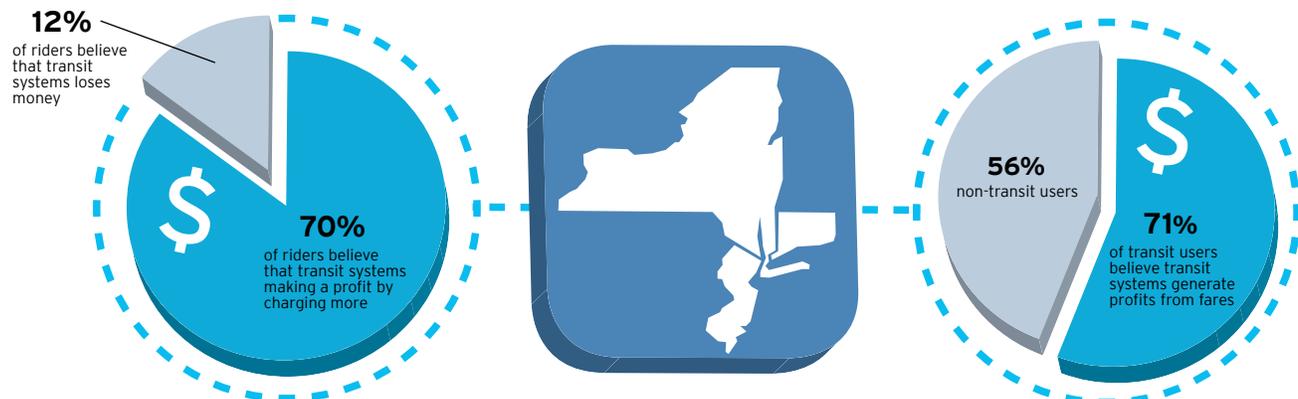
Most local transit users feel they are paying too much.



### PROFITS?

With so many tri-state residents thinking they are paying more than what is needed, transit users are disillusioned. There seems to be a sense that transit agencies are simply using transit fares to gather significant amounts of money. Among all tri-state residents, 70 percent believe transit systems make a profit by charging more than the ride actually costs, while 12 percent think the system loses money because fares don't cover expenses. Among transit users, 71 percent believe transit systems make a profit by charging more than the ride costs, while less than three in five (56 percent) of non-transit users express the same feelings.

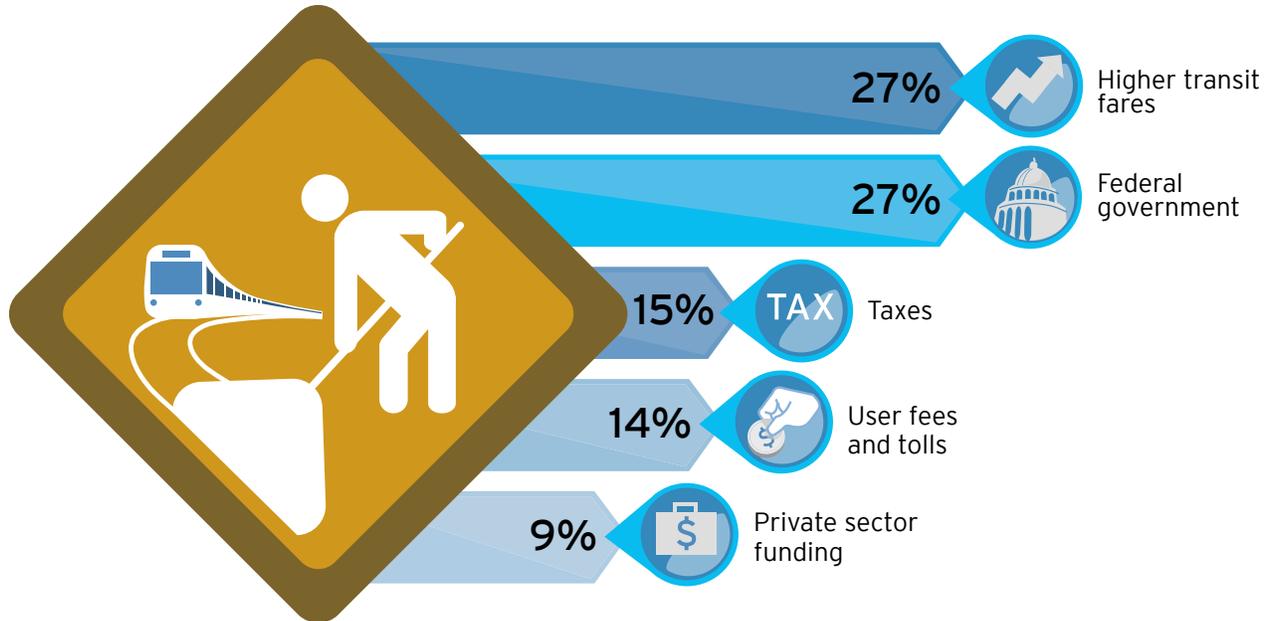
Tri-state residents are disillusioned by the money transit systems are gathering.



## MAINTAINING AND IMPROVING TRANSIT

There are widely diverging views on how to pay for the maintenance and improvement of transit systems to maintain current service levels and to accommodate increased ridership.

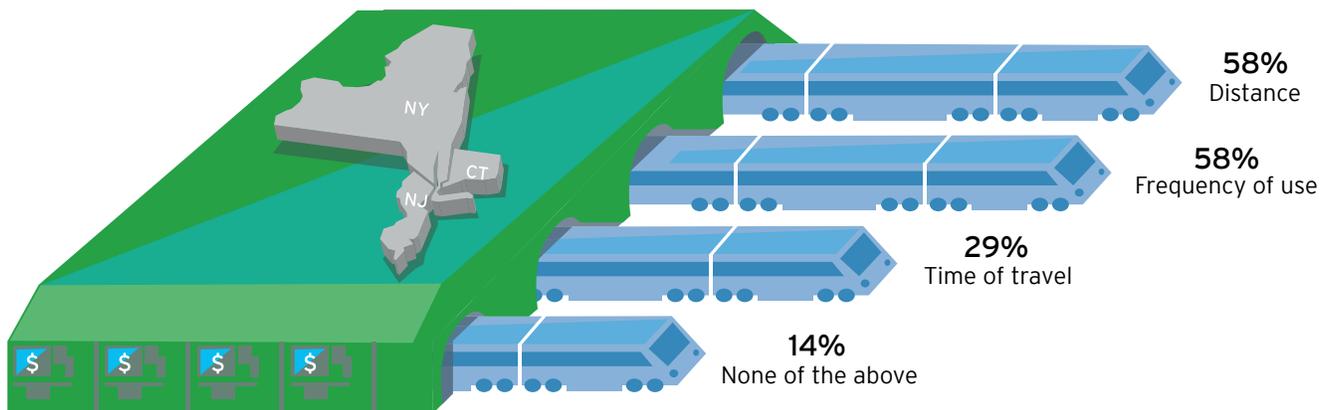
Where should funding come from?



## FAIR WAY TO PAY FARES

A flat fare in the New York City subway system will take riders anywhere the system reaches, any time of day or night compared to fares in many major metropolitan areas in the United States that are based on a formula that includes distance traveled and the time of day the travel occurs.

A majority of tri-state residents believe fares based on distance and frequency of use are fair.



HNTB Corporation's latest survey, America THINKS: Metropolitan New York City Transit Fare Myths and Realities, was conducted between January 5 and January 23, 2015 among 1,033 Americans aged 18 and over, in the New York City and immediately surrounding area, for their opinions on the region's transit network. This regional study is part of HNTB's America THINKS survey series, an on-going national study of critical transportation infrastructure issues.

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## Additional resources

**American Public Transportation Association**

[www.apta.com](http://www.apta.com)

**American Association of State Highway and Transportation Officials**

[www.transportation.org](http://www.transportation.org)

**Intelligent Transportation Society of America**

[www.itsa.org](http://www.itsa.org)

**The American Road & Transportation Builders Association**

[www.artba.org](http://www.artba.org)

**International Bridge, Tunnel and Turnpike Association**

[www.ibtta.org](http://www.ibtta.org)

For more information on the America THINKS survey series, visit [www.hntb.com/Newsroom/Media-Kits/America-THINKS-surveys-\(1\)](http://www.hntb.com/Newsroom/Media-Kits/America-THINKS-surveys-(1)) or contact David Fridling, (917) 438-0900, [dfridling@hntb.com](mailto:dfridling@hntb.com) with questions, comments or suggestions on future survey topics.

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