

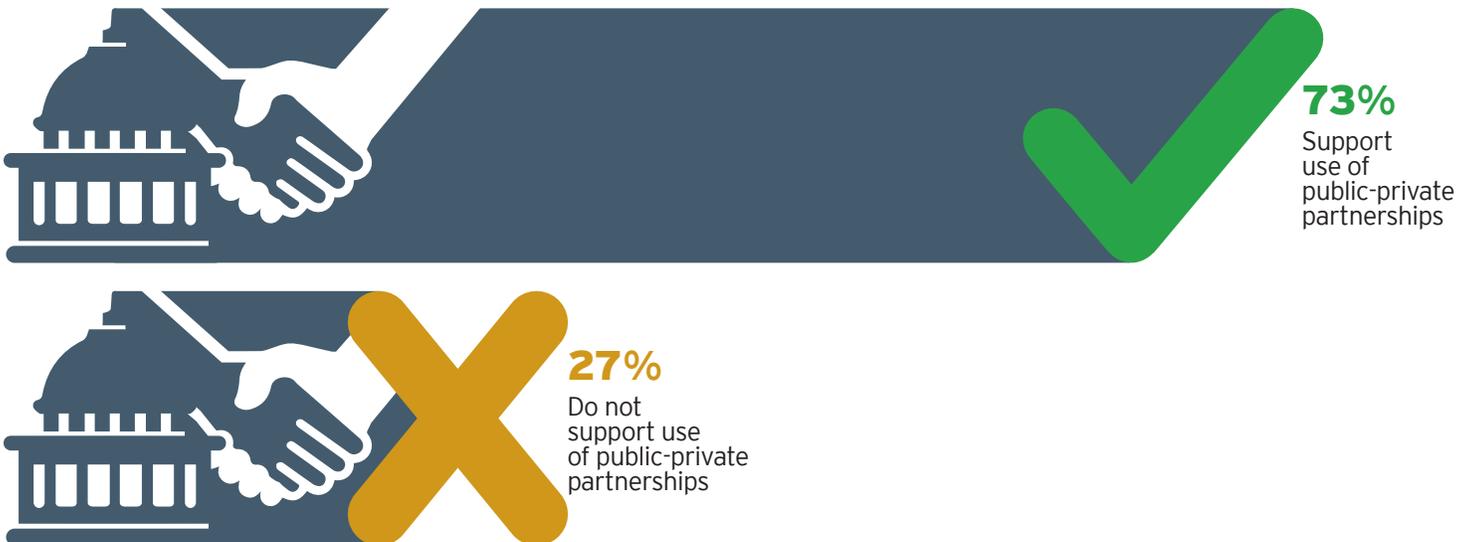
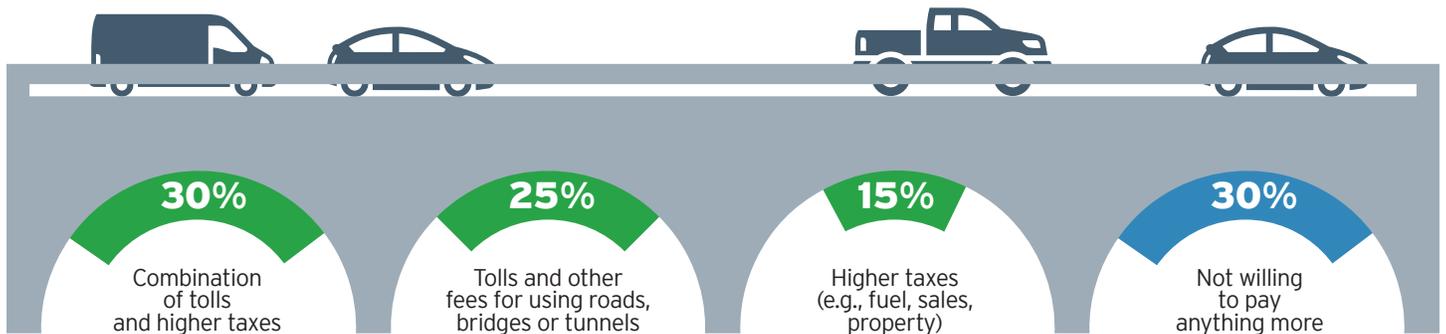


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## America THINKS 2017 Survey Compilation

### AMERICANS' VIEWS ON U.S. TRANSPORTATION ISSUES

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# Creating innovative approaches to solve America's critical transportation infrastructure issues require an in-depth understanding of concerns and priorities.

Americans recognize the value and benefits of mobility and understand the direct relationship of infrastructure to our economic and social well-being. While a consensus is emerging about the need to invest in our transportation infrastructure, there is continuing debate about where to find funding for those investments and how to prioritize spending. With funding at the federal level continuing to remain scarce, Americans around the nation are taking matters into their own hands by approving state and local ballot initiatives to create mechanisms that generate needed revenue for transportation projects.

Every day, we read, see and hear about the need for and benefits of infrastructure investment. Americans want airport terminals that meet the challenges and needs of air travel as well as offer a stress-free travel experience. They see how smart investments in transit and rail infrastructure can increase comfort, efficiency and speed of our rail systems and do so with added safety. We learn about new emerging technologies that will make our streets and highways safer, and innovations to increase capacity of existing highways while reducing the chokehold of dangerous and wasteful congestion.

There is increased appreciation for the use of alternative financing methods, modern construction techniques and technologies that make the most of investment resources to build iconic new bridges that are stronger and more resilient than ever before. Americans increasingly realize the benefits of dedicated express lanes in reducing congestion, the use of tolling technologies that promote smooth travel and highway safety while automating the entire revenue management process; and new state and local taxes that are dedicated by law for infrastructure investment only.

As these concerns emerge and evolve, HNTB Corporation will continue to encourage dialogue and discussion among industry professionals, elected and appointed officials, and the American people by asking "What do you think?" as part of its award-winning America **THINKS** survey series.

During 2017, HNTB conducted four national (and one regional) public opinion surveys examining issues associated with the passenger experience of air travelers at airport terminals; benefits of public transportation; roadway safety and congestion; and growing need for infrastructure funding.

For more information about the findings of these surveys, contact David Fridling, [dfridling@hntb.com](mailto:dfridling@hntb.com).

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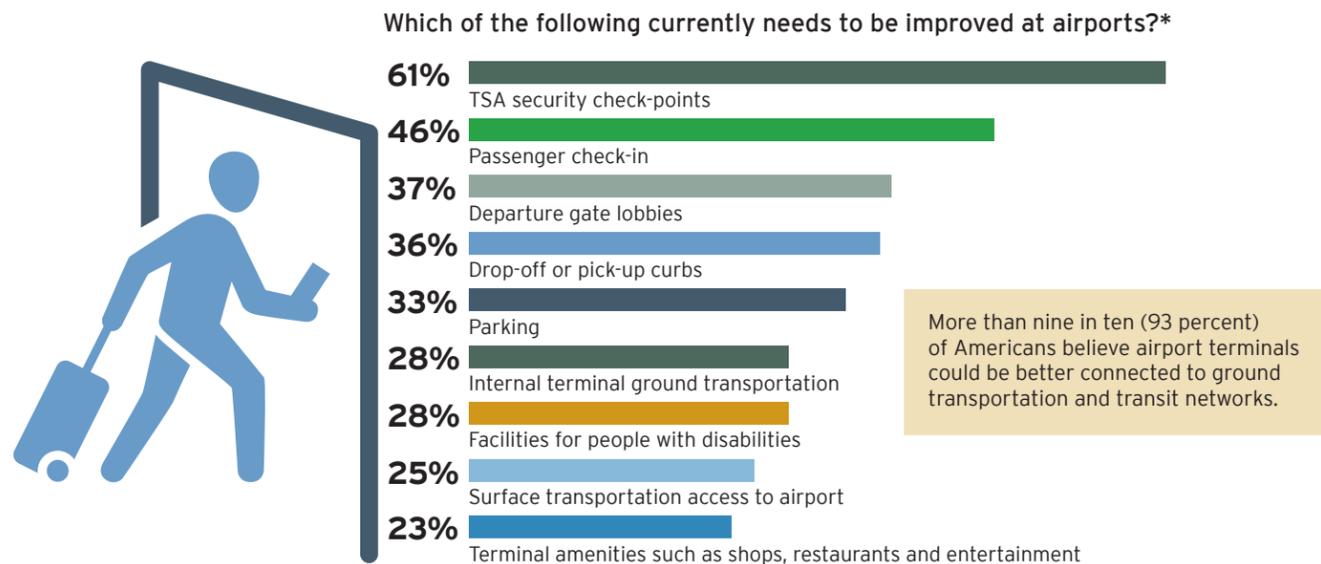
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**WHEN IT COMES TO AIR TRAVEL, WAITING IN LINE IS CHIEF COMPLAINT**

Before ever boarding an aircraft, securely fastening seatbelts and ensuring tray tables are in the fully upright and locked position, Americans are concerned about their ability just to get to, and around, airports. The importance of good connections to ground and transit networks, adequate and convenient parking, ease of access to drop-off/pick-up curbs and amenities in the terminal are increasingly cited by Americans as impacting their air travel experience. The findings of a new HNTB America THINKS survey provide new insights into what air travelers want airport authorities to consider when investing and improving their facilities.

**IMPROVEMENTS WANTED**

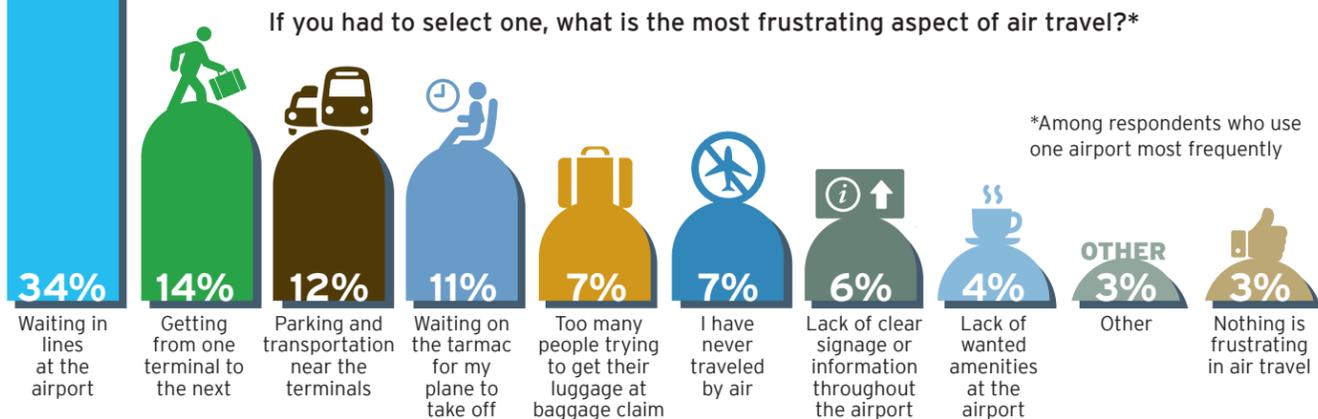
Many Americans feel enhancements are needed to improve the quality of their airport experiences. While security checkpoints continue to be seen as necessary (and bothersome), there are many other opportunities to create a positive impact for travelers.



\*Among respondents who say something needs to be improved at airports.

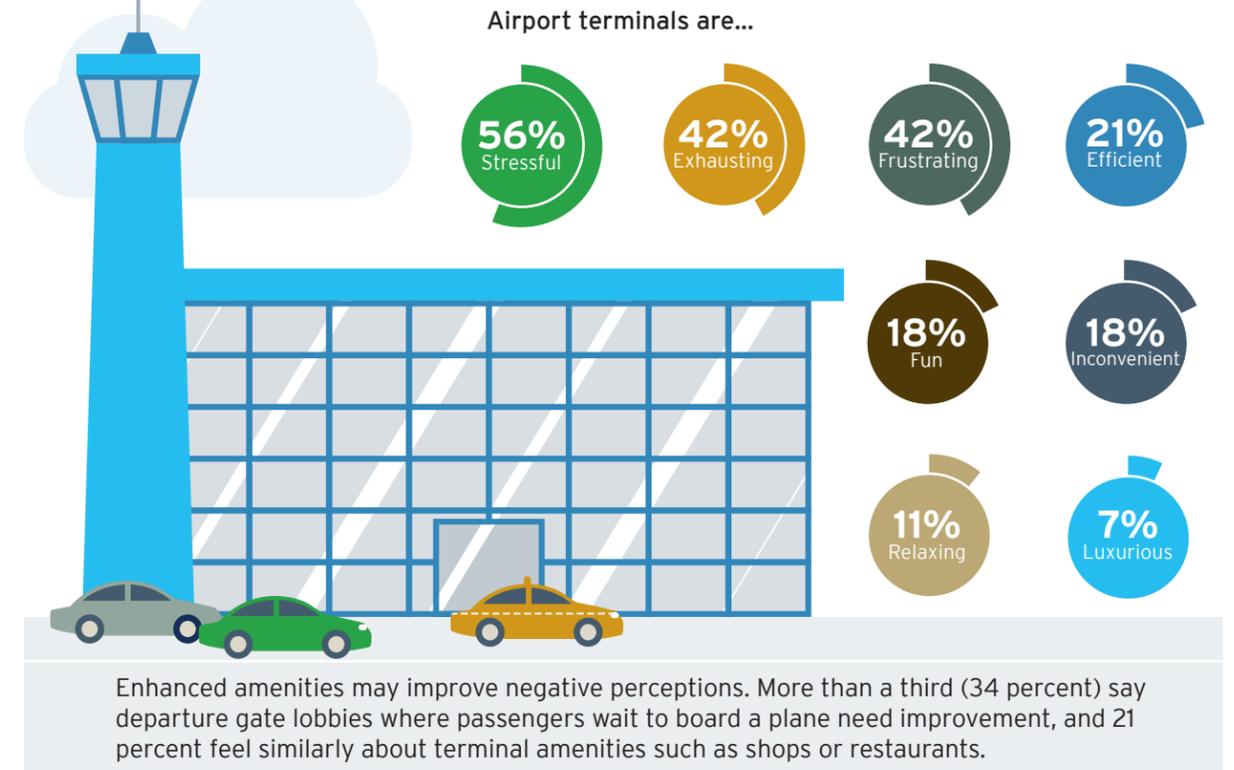
**MINIMIZE FRUSTRATIONS**

More than one in four (28 percent) of American air travelers feel waiting in lines is the most unsatisfying aspect of their experience. In addition, 29 percent of Americans believe airports do not have an efficient design when it comes to parking structures, pick up curbs and ground transportation.



**TERMINAL EXPERIENCE**

Most Americans do not look forward to their time at the airport.



**TECHNOLOGY MAY BE THE ANSWER**

Air travelers believe new technologies can provide more comfort in the terminal.

Which of the following types of technology do you think would greatly benefit you as an air traveler and improve your travel experience?



The HNTB Survey, "Airport Terminals - 2017" was conducted between Dec. 1-8, 2016 among 1,054 nationally representative Americans ages 18 and over, using an email invitation and an online survey. Quotas are set to ensure a reliable representation of the U.S. population 18 and over. The margin of error of +/- 3.1%. 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)

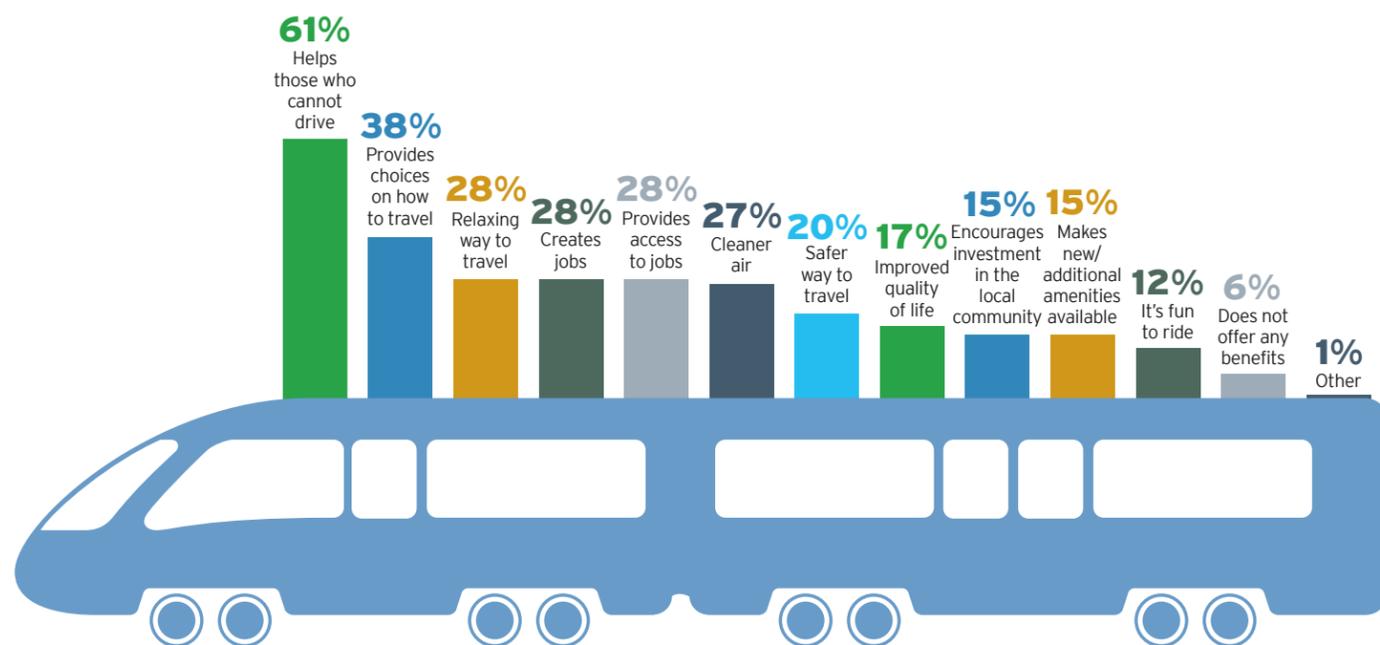
### AMERICANS RECOGNIZE THE BENEFITS OF PUBLIC TRANSPORTATION

Americans today view public transportation in a new and broader context than ever before. Public transportation doesn't just provide simple mobility – it gives people the opportunity to select various travel options. Public transportation also provides other benefits such as contributing to economic growth, stronger business opportunities, and a better quality of life.

#### PUBLIC TRANSPORTATION OFFERS A WIDE ARRAY OF BENEFITS

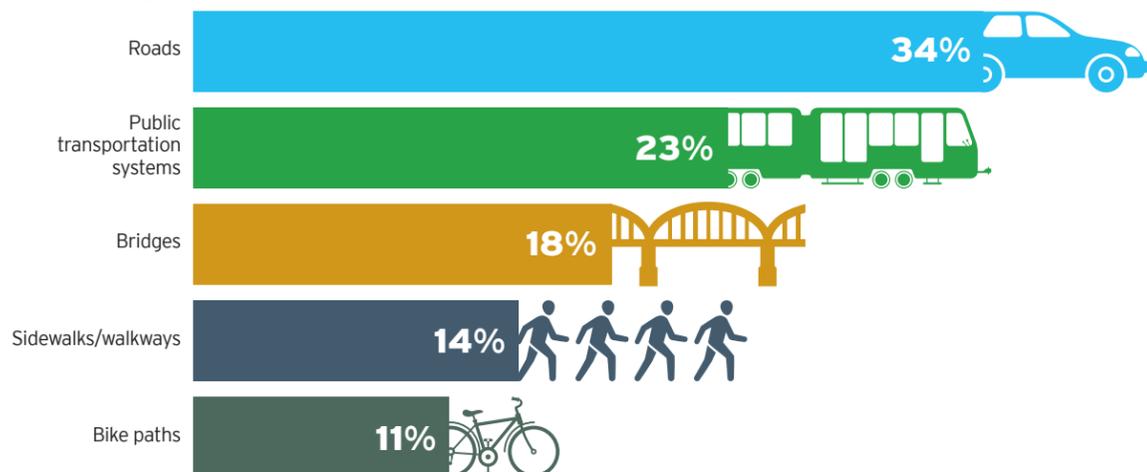
Almost nine of every ten Americans (88 percent) feel public transportation systems offer specific benefits to the areas they serve.

What benefits does public transportation offer (among those with access):



#### IF YOU WERE IN CHARGE

How would you divide spending of available funds to make improvements to transportation infrastructure?



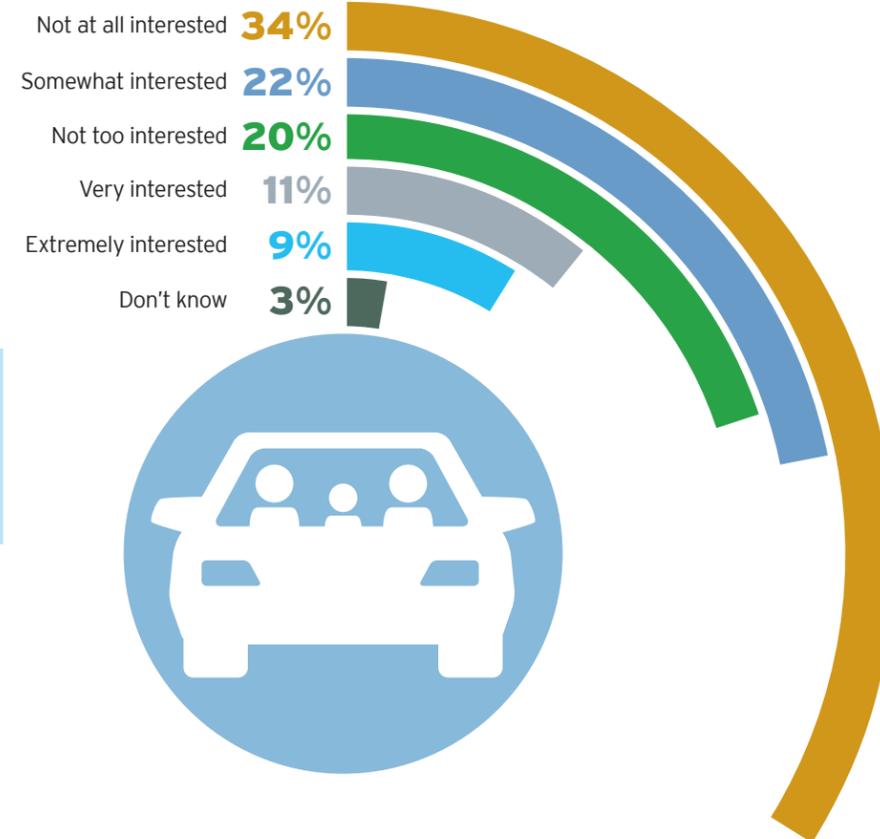
#### IF YOU WERE IN CHARGE

How would you divide spending of available funds for components of your local public transit system?



#### RIDE-SHARING

How interested would you be in using some form of ride-sharing to get to or from a public transportation service in the future?\*



Among millennials, 63 percent would be interested in using ride-sharing to get to or from a public transportation service, versus 28 percent among those 35 and older

\* Total who have access to public transportation.

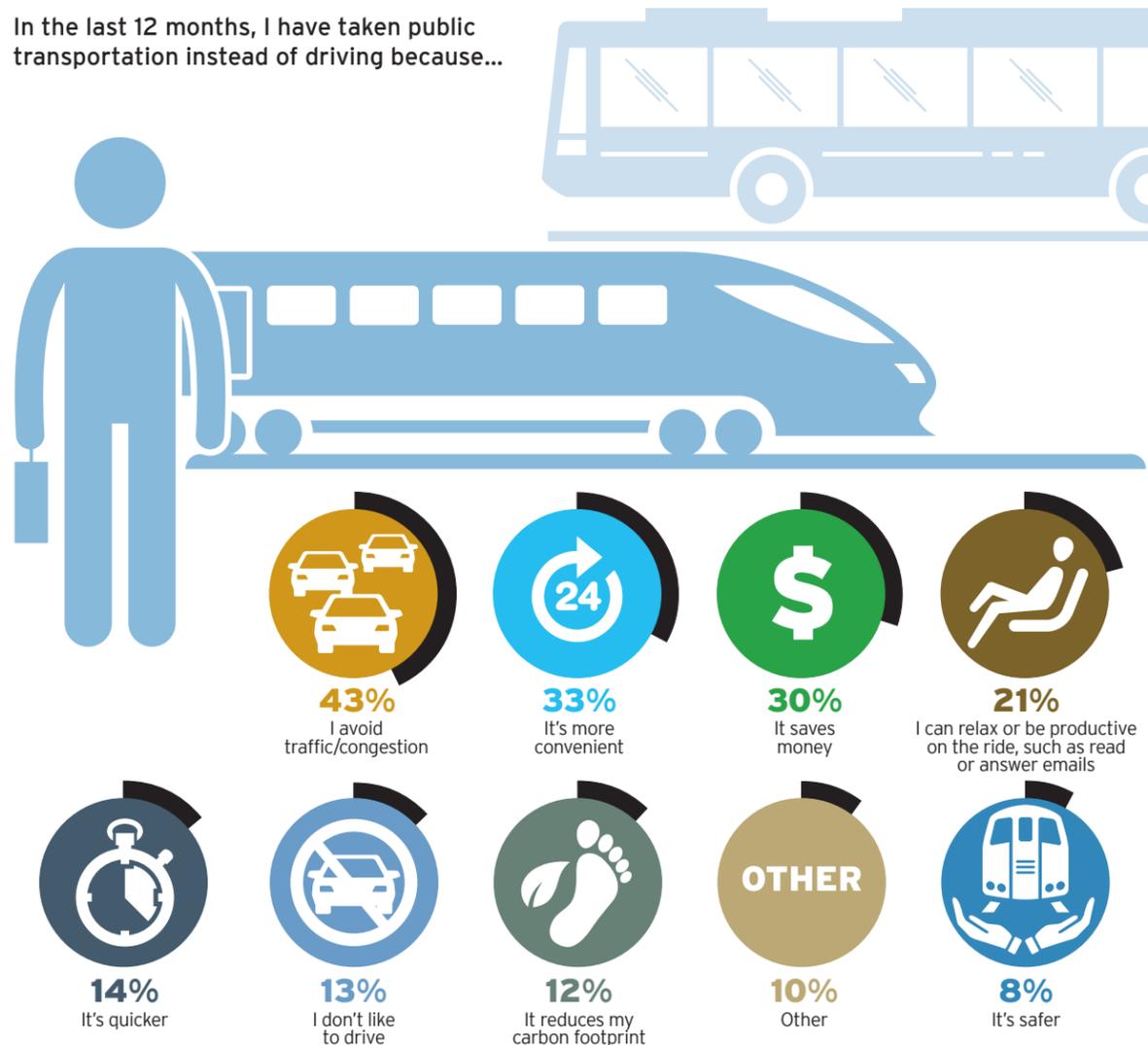
HNTB's America THINKS "Public Transportation-2017" survey polled a random nationwide sample of 1034 Americans between March 10 and March 13, 2017. It was conducted by Russell Research, which used an email invitation and online survey. Quotas were set to ensure a reliable representation of the entire U.S. population ages 18 and over. The margin of error is +/- 3.0 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)  
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**CONGESTION, CONVENIENCE AND COST DRIVE USE OF PUBLIC TRANSPORTATION IN PHILADELPHIA REGION**

Public transportation, and especially rail transit, is integral to people living in the metropolitan area. They rely on it for choice of mobility options and convenient access for travel within Philadelphia and to and from the suburbs. With access to public transportation as an alternative, residents can avoid traffic congestion and save money.

**IN THE REGION, PUBLIC TRANSPORTATION IS THE MOBILITY OPTION OF CHOICE**

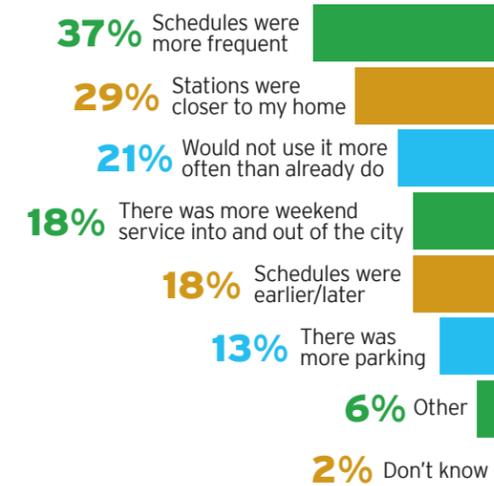
In the last 12 months, I have taken public transportation instead of driving because...



Public transportation impacts millennials more than any other segment of Philadelphia's regional population. It affects decisions about where they choose to live (72 percent) and willingness to pay a higher rent or mortgage (68 percent). In the past five years, interest in living near public transportation has increased 52 percent among the region's millennials.

**WHILE USAGE OF PUBLIC TRANSPORTATION IN GREATER PHILADELPHIA IS RELATIVELY HIGH, PEOPLE COULD BE ENCOURAGED TO USE IT MORE FREQUENTLY**

Seventy-six percent of people in the Philadelphia region would use public transportation more often if ...



Almost 9 in ten millennials (87 percent) expressed an interest in using a ride-sharing service to travel to and from their homes to public transportation services versus 56 percent of all respondents.

HNTB's America THINKS "Public Transportation in the Philadelphia Region-2017" survey was conducted between March 24 and March 27, 2017. It polled a random sample of 1068 adults from Bucks, Chester, Delaware, Montgomery and Philadelphia counties in Pennsylvania, and Burlington and Camden counties in New Jersey. It was conducted by Russell Research, which used an email invitation to an online survey. Quotas were set to ensure reliable representation of the Philadelphia region's population ages 18 and over. The margin of error is +/- 3.0 percent.

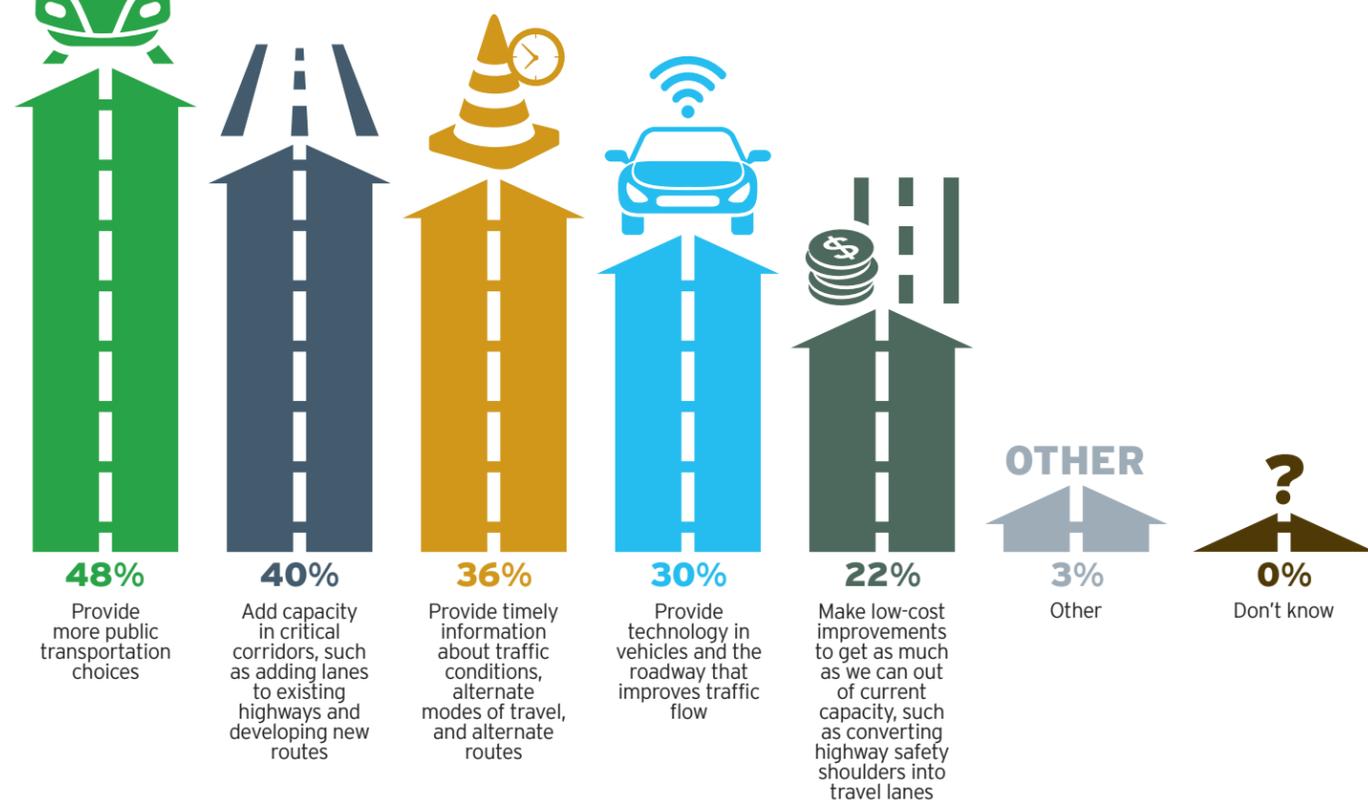
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**AMERICANS ARE CONCERNED THAT DELAYED REPAIRS TO ROADS AND BRIDGES AFFECTING TRAVEL SAFETY AND CONGESTION**

U.S. traffic deaths have increased 14 percent in the past two years. Americans recognize our crumbling highway and bridge infrastructure contributes to highway fatalities and congestion. They also recognize that congestion impacts to highway safety. Our transportation priorities, Americans believe, must address these issues with solutions that are available today, and can help reduce this urgent national concern.

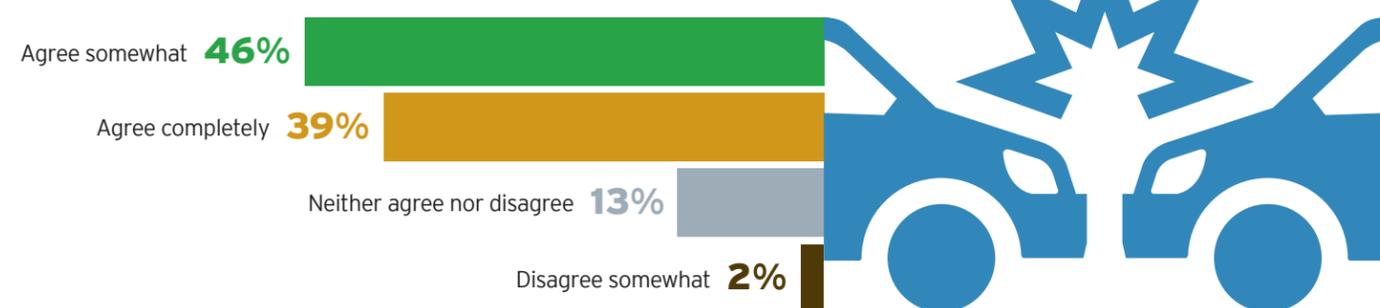
*More than nine in 10 Americans believe maintaining our existing highway and bridge infrastructure is extremely or very important to improve safety and reduce congestion.*

What is the most important priority for our surface transportation network?

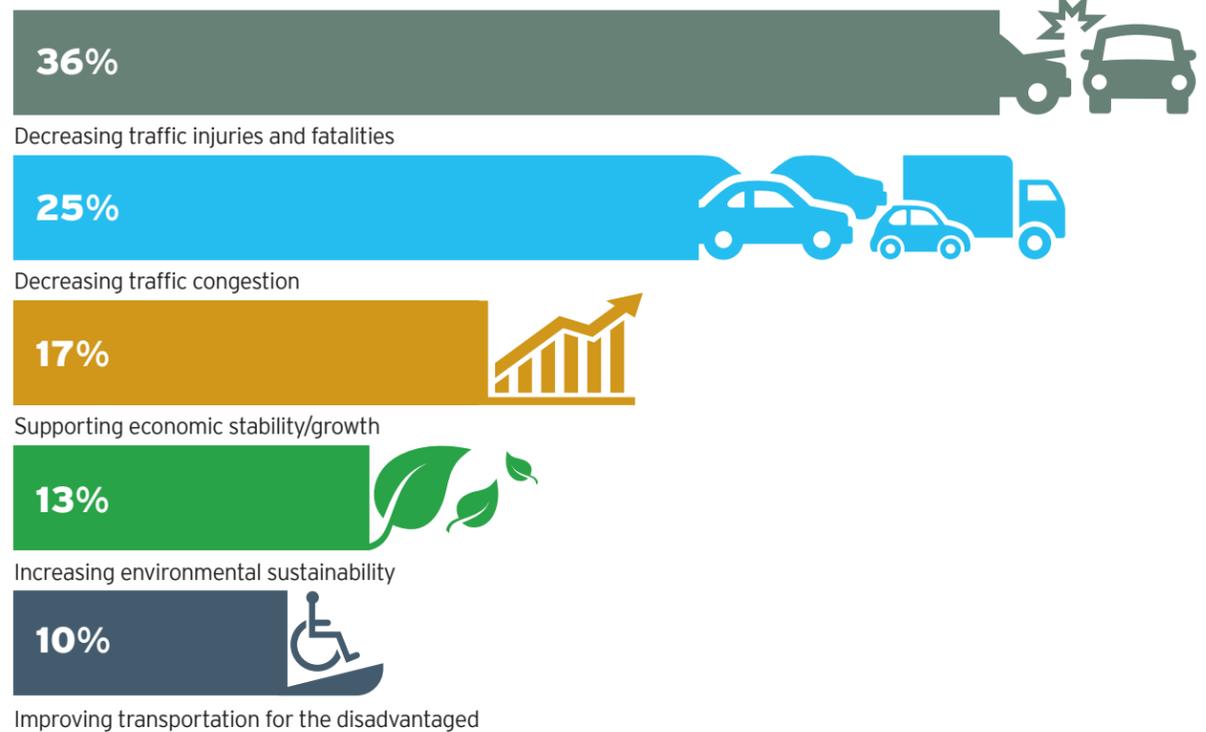


*More than eight in 10 Americans believe increased traffic congestion directly contributes to highway fatalities.*

How strongly do you agree or disagree that congestion contributes to increased traffic accidents and fatalities?

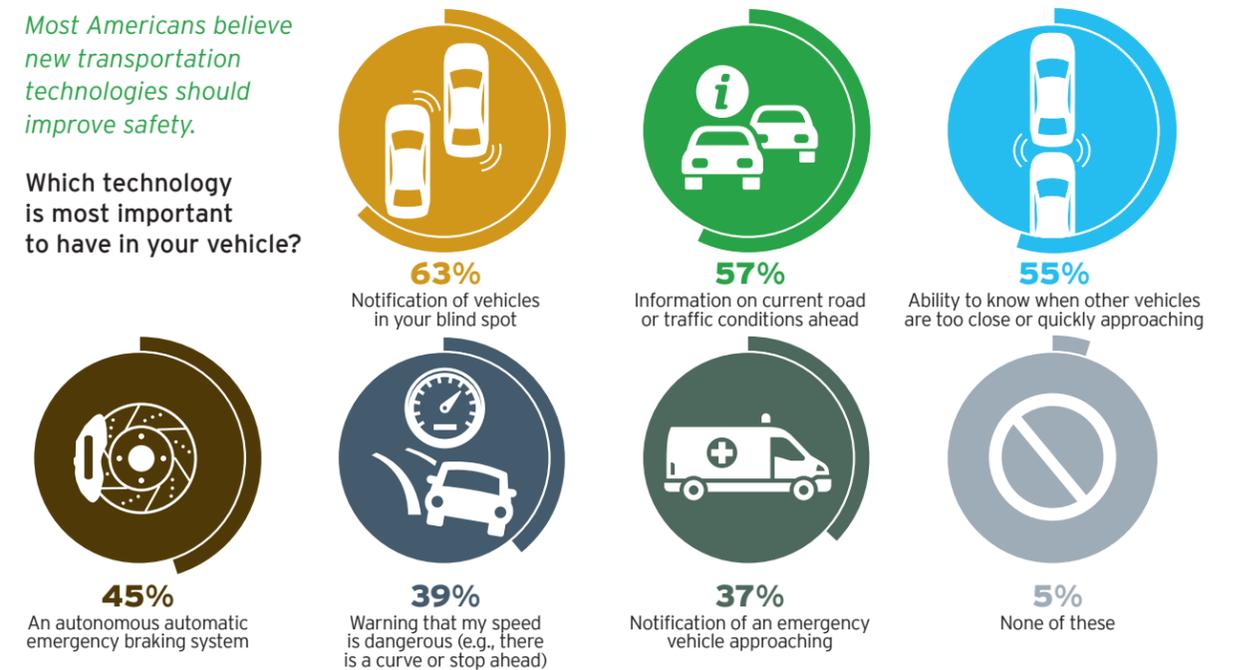


*Americans have specific ideas for surface transportation priorities.*



*Most Americans believe new transportation technologies should improve safety.*

Which technology is most important to have in your vehicle?



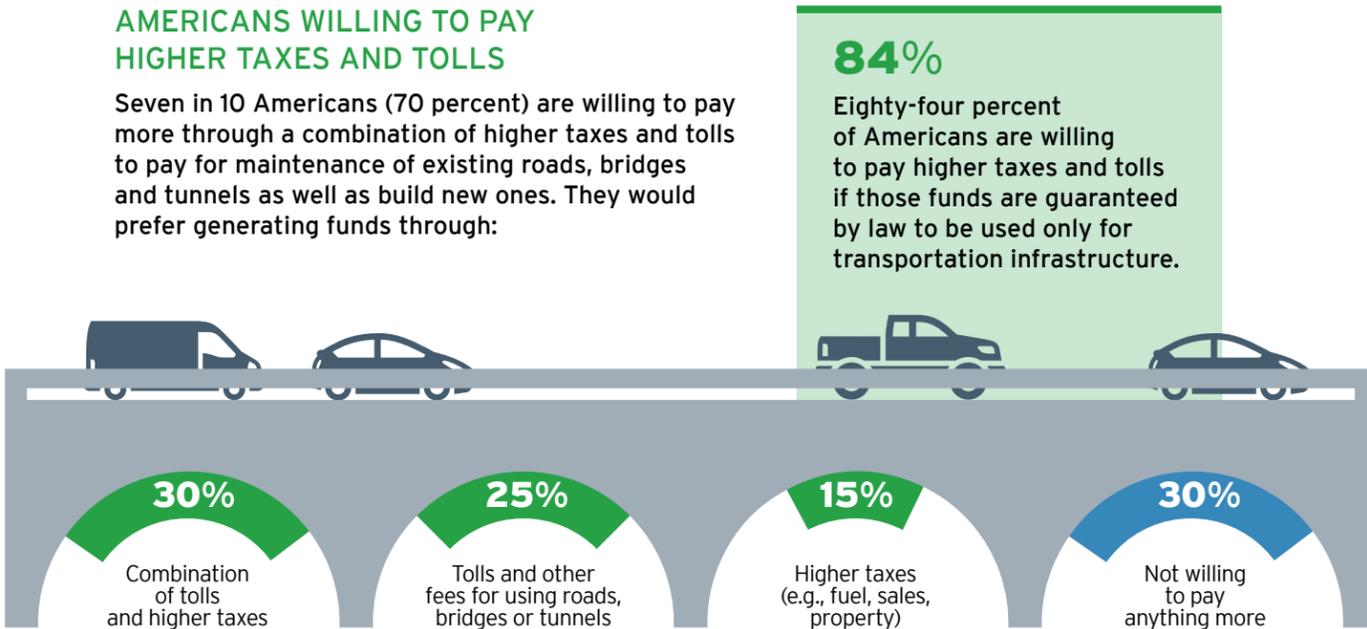
HNTB's America THINKS: "Roadway Safety and Congestion - 2017" survey polled a random nationwide sample of 1,182 Americans, ages 18 and older, between April 7 and April 10, 2017. It was conducted by Russell Research, which used an email invitation and online survey. Quotas were set to ensure reliable representation of the entire U.S. population ages 18 and over. The margin of error is +/- 2.9 percent. © 2017 HNTB Companies. All rights reserved. Reproduction in whole or in part without written permission is prohibited. HC331 05/17

**AMERICANS WILLING TO PAY MORE TO REBUILD AND GROW TRANSPORTATION INFRASTRUCTURE**

With lawmakers continuing to search for solutions to fund and finance our nation's transportation infrastructure, Americans have definitive views on how that funding should be generated. People in this country also have strong views on who should be responsible for maintaining and building our nation's transportation network.

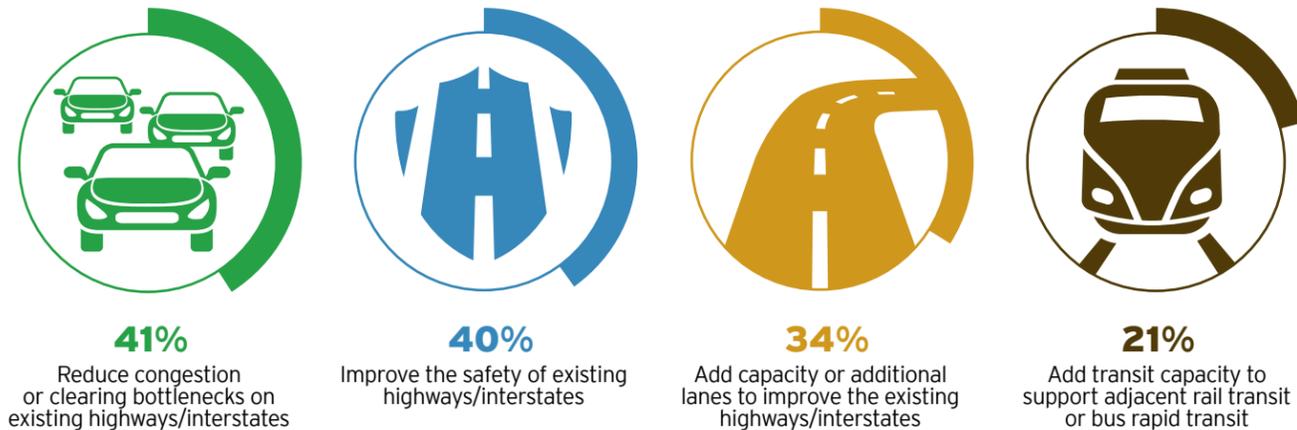
**AMERICANS WILLING TO PAY HIGHER TAXES AND TOLLS**

Seven in 10 Americans (70 percent) are willing to pay more through a combination of higher taxes and tolls to pay for maintenance of existing roads, bridges and tunnels as well as build new ones. They would prefer generating funds through:



**REDUCED CONGESTION AND IMPROVED SAFETY TOP REASONS TO TOLL EXISTING HIGHWAYS AND INTERSTATES**

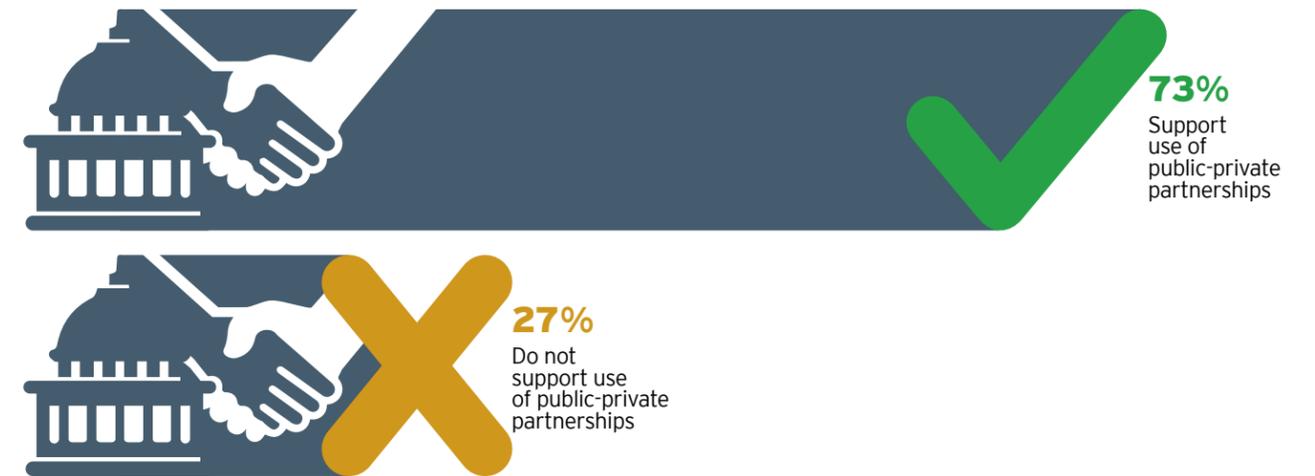
Eight in 10 Americans (80 percent) would support tolls on existing highways and interstates if the funds are directed to specific uses. Americans willing to pay higher taxes and tolls believe those funds should be used to:



**20%** Twenty percent of Americans would never support tolls on existing highways/interstates.

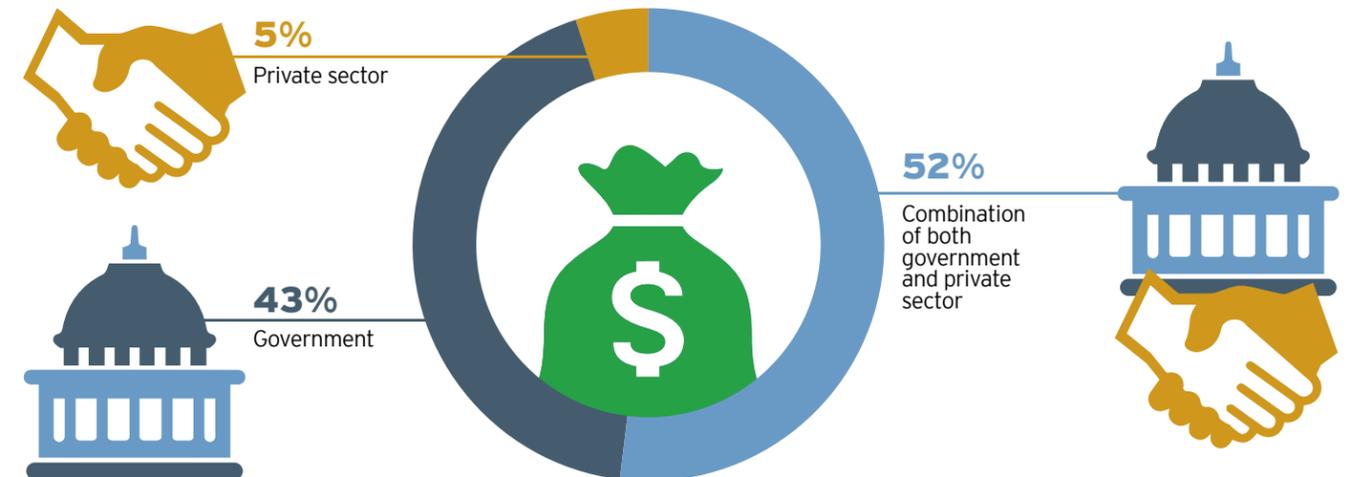
**PUBLIC-PRIVATE PARTNERSHIPS HAVE STRONG SUPPORT**

More than seven in 10 Americans support the use of public-private partnerships as a way to maintain existing and build new infrastructure, and they believe responsibility for the nation's transportation infrastructure should be shared between the government and private sector.



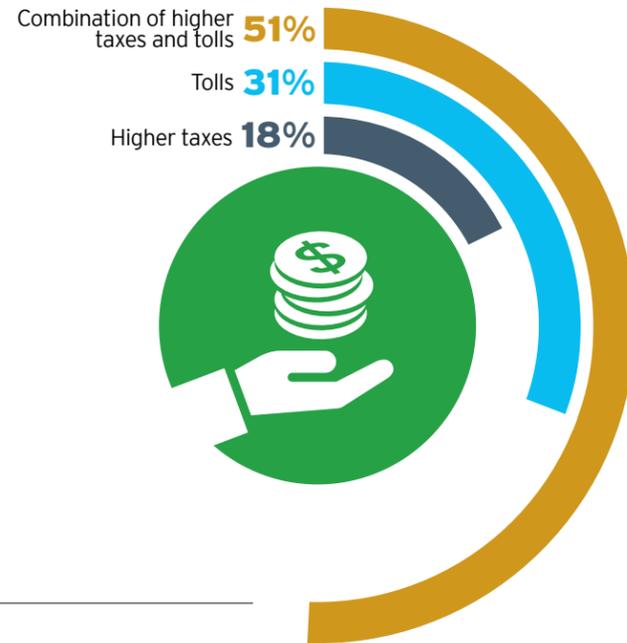
**FUNDING FOR TRANSPORTATION INFRASTRUCTURE SHOULD BE SHARED BY GOVERNMENT AND THE PRIVATE SECTOR**

A majority of Americans (52 percent) believe the responsibility for funding to maintain and build transportation infrastructure should be shared by government and the private sector.



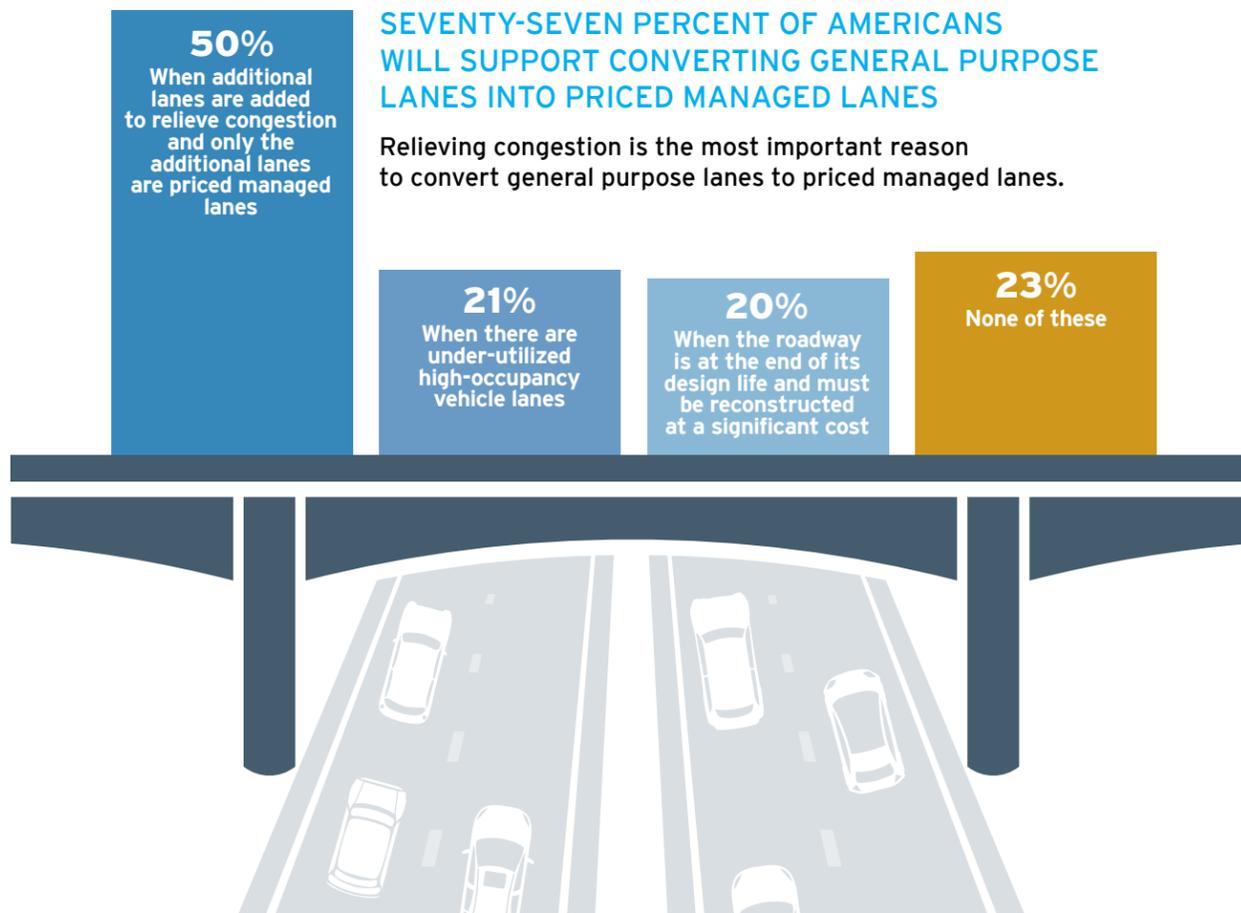
**REPAY PRIVATE INVESTORS USING HIGHER TAXES AND TOLLS**

A majority of Americans believe the combination of tolls and increased taxes should be used to pay for private-sector investment into the nation's infrastructure.



**SEVENTY-SEVEN PERCENT OF AMERICANS WILL SUPPORT CONVERTING GENERAL PURPOSE LANES INTO PRICED MANAGED LANES**

Relieving congestion is the most important reason to convert general purpose lanes to priced managed lanes.



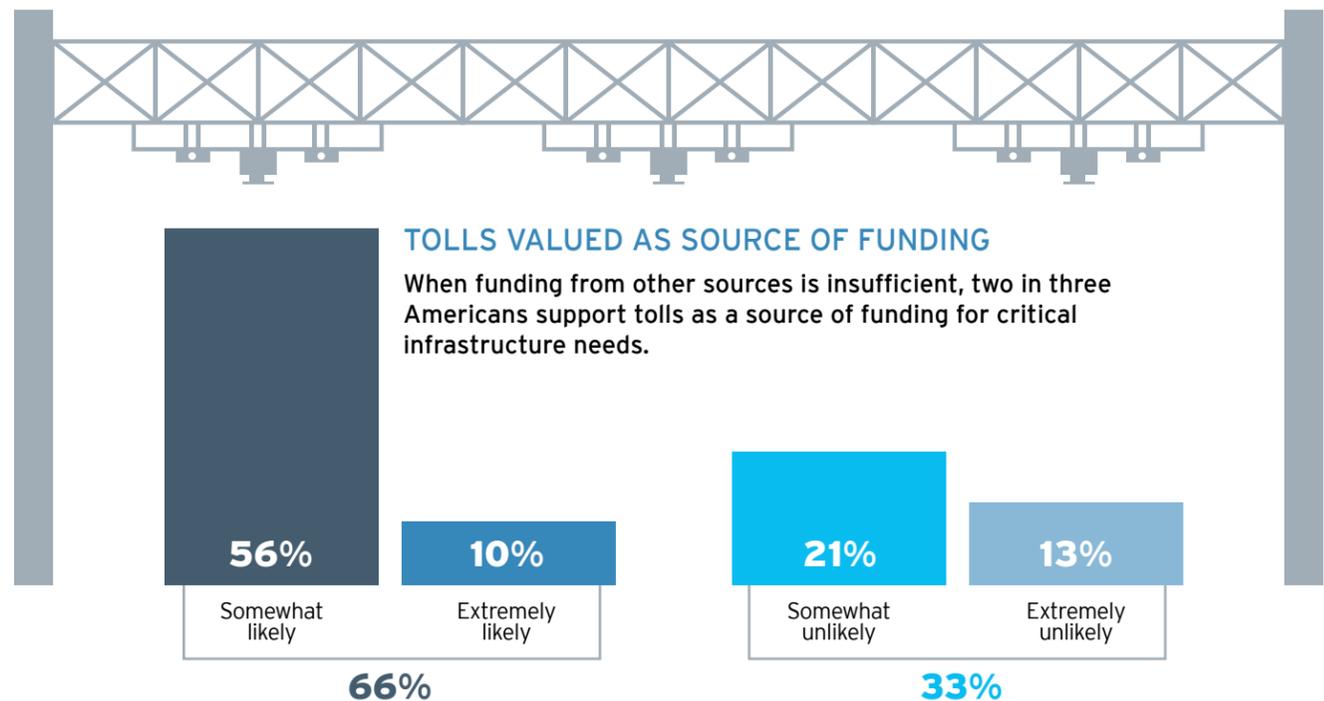
**AMERICANS AGREE PRICED MANAGED LANES CAN FUND HIGHWAY IMPROVEMENTS**

Seventy percent of Americans believe priced managed lanes should be considered when making improvements to the nation's highways.



**TOLLS VALUED AS SOURCE OF FUNDING**

When funding from other sources is insufficient, two in three Americans support tolls as a source of funding for critical infrastructure needs.



HNTB's America THINKS survey "Paying for Infrastructure - 2017" polled a random nationwide sample of 1,027 Americans, ages 18 and older, between July 14 and July 16, 2017. It was conducted by Russell Research, using an email invitation and online survey. Quotas were set to ensure reliable 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).

## 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)

**Federal Highway Administration**

[www.fhwa.dot.gov](http://www.fhwa.dot.gov)

**Voices for Public Transit**

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

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



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