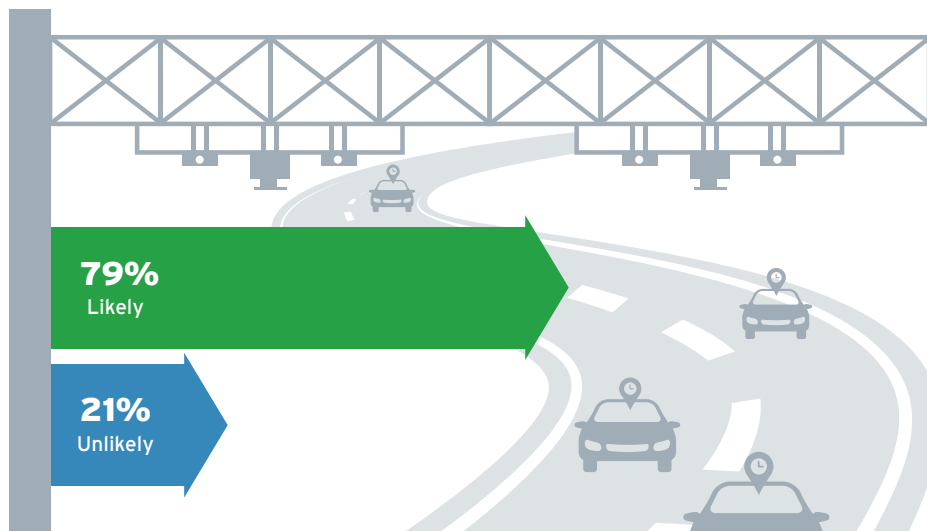




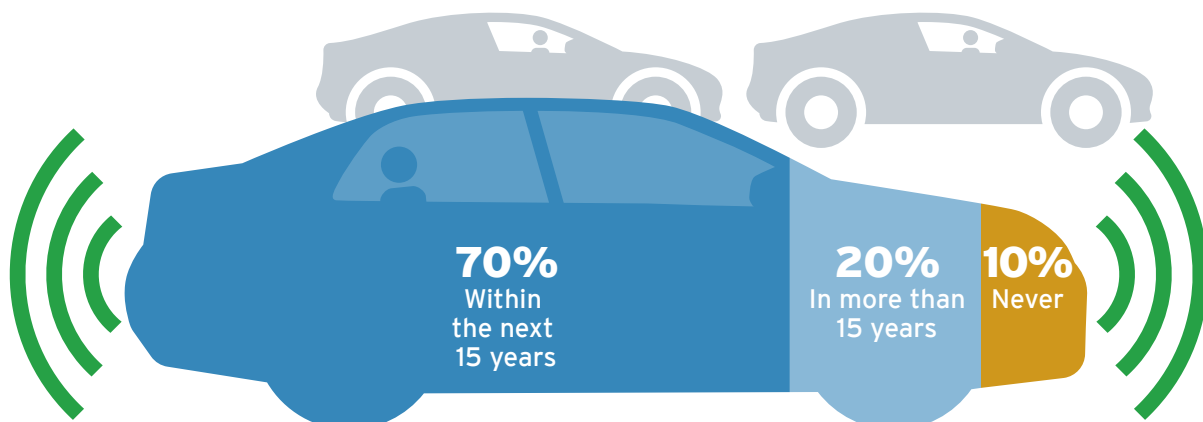
America **THINKS** 2018 Survey Compilation

AMERICANS' VIEWS ON U.S. TRANSPORTATION ISSUES

AMERICANS ARE WILLING TO PAY TOLLS TO AVOID CONGESTION AND HAVE PREDICTABLE TRAVEL TIMES, EVEN WHEN FREE ALTERNATIVES ARE AVAILABLE.



AUTONOMOUS VEHICLES ARE COMING OUR WAY



Understanding Americans' concerns and priorities about critical transportation infrastructure challenges leads to innovative solutions.

Americans value mobility and understand that a high-quality, reliable and sustainable transportation system is needed for economic prosperity and a desirable quality of life. There is consensus about the need to invest in our transportation infrastructure along with the willingness to fund that investment through higher taxes and tolls. However, a consistent long-term source of funding continues to be a source of debate among Congress. With funding at the federal level continuing to remain scarce, Americans and their elected officials 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.

Traditional methods of travel we use today – car, train, bus, air – are evolving and changing; however, the need for reliable and sustainable funding sources for infrastructure repair and creation remains an ongoing challenge. For example, while Americans still prefer to use private automobiles for travel to and from airports, the use of ride-sharing services for these trips is rapidly growing, with significant impacts on airport operators. Most Americans believe automated vehicles will become commonplace on our streets and highways within 15 years and recognize the potential benefits these vehicles offer. Great value is placed on our public transportation system, and people believe government should play a role in funding these options. Americans continue to believe traffic congestion is increasing and are willing to pay higher taxes and tolls if they are assured those funds will be used to improve mobility.

As we learn more about these concerns, HNTB Corporation will continue to encourage 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 2018, HNTB conducted four national public opinion surveys (and one regional survey) examining issues associated with how people travel to and from airports; the advent and potential impacts of automated vehicles; the importance Americans place on public transportation and their views on governments’ role in funding this option; and increasing frustration with roadway congestion and potential sources of funding to help improve mobility.

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2018 America **THINKS** Survey Results

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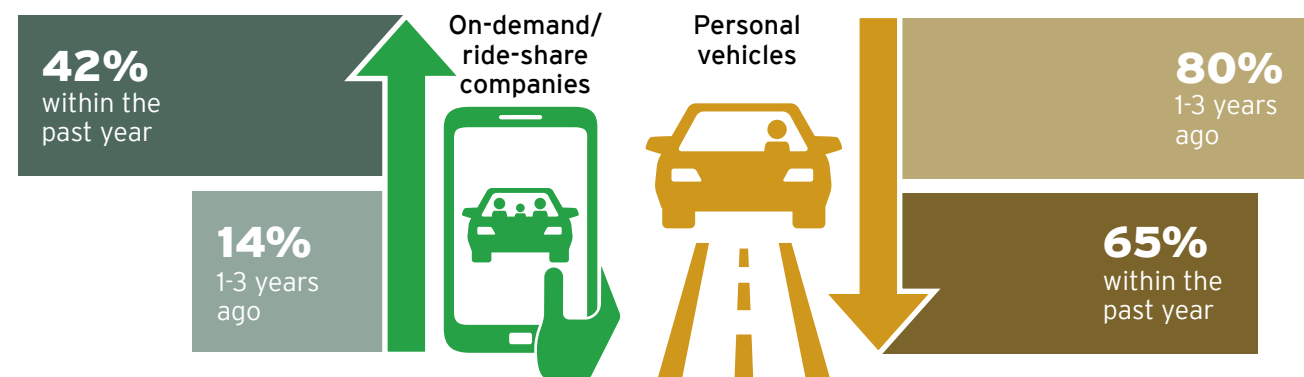
Continued frustration with increasing congestion has Americans willing to pay higher tolls and taxes for infrastructure improvements (October)..... 13

RIDE-SHARING SERVICES INCREASINGLY USED FOR ACCESS TO AIRPORTS; EXPERIENCE AT AIRPORT TERMINALS SHOWING IMPROVEMENT

Whether air travel is for business or pleasure, before ever boarding an airplane, the journey begins with the trip to the airport and the airport terminal experience. While multiple travel options are available in many parts of the country, American air travelers still prefer to begin their trip in a personal vehicle. However, the findings of a new HNTB America THINKS national survey identifies a rapidly emerging trend toward the use of ride-sharing services for that travel. The survey also found that within the past year, air travelers believe their travel experience has significantly improved.

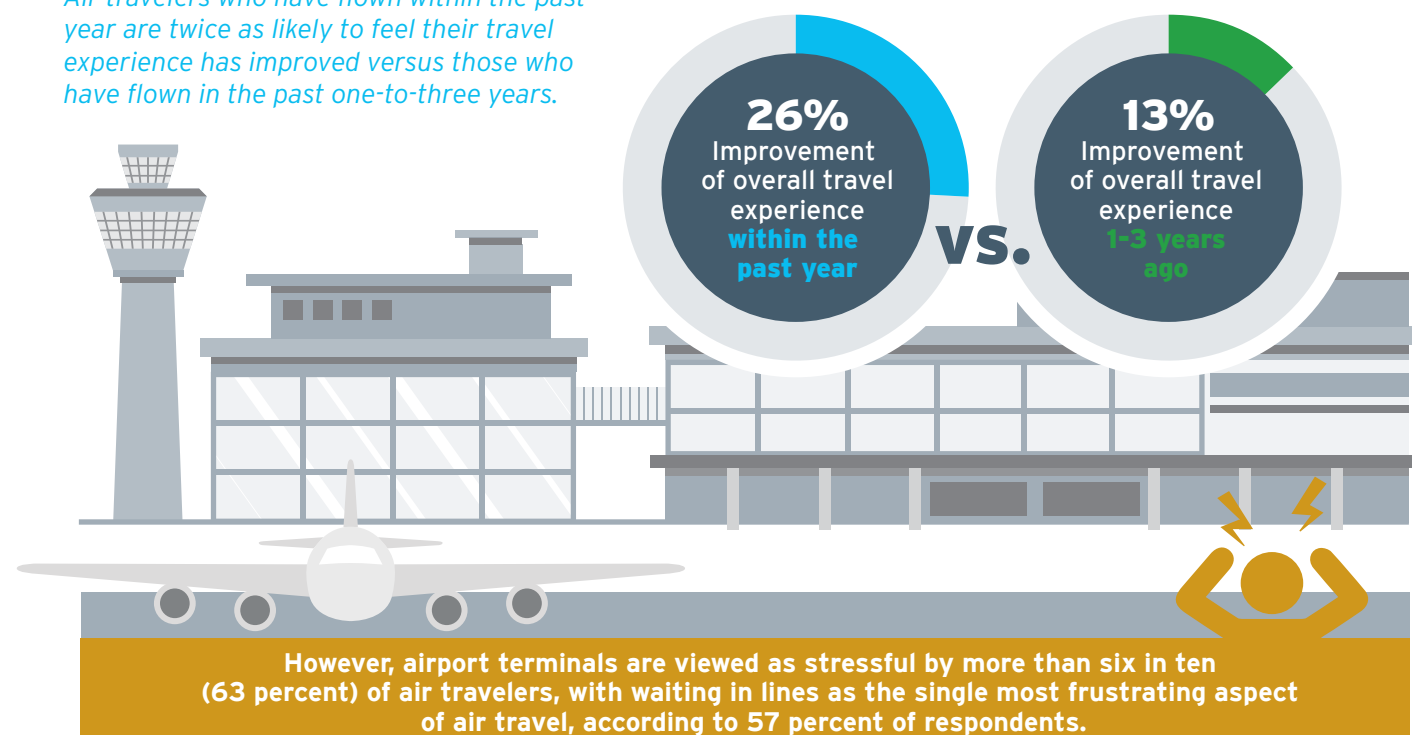
RAPIDLY INCREASING PREFERENCE FOR USE OF RIDE-SHARING SERVICES

Within the past year, the use of ride-sharing services has tripled. And among those who use ride-sharing, there is a significant decrease in the use of personal vehicles.



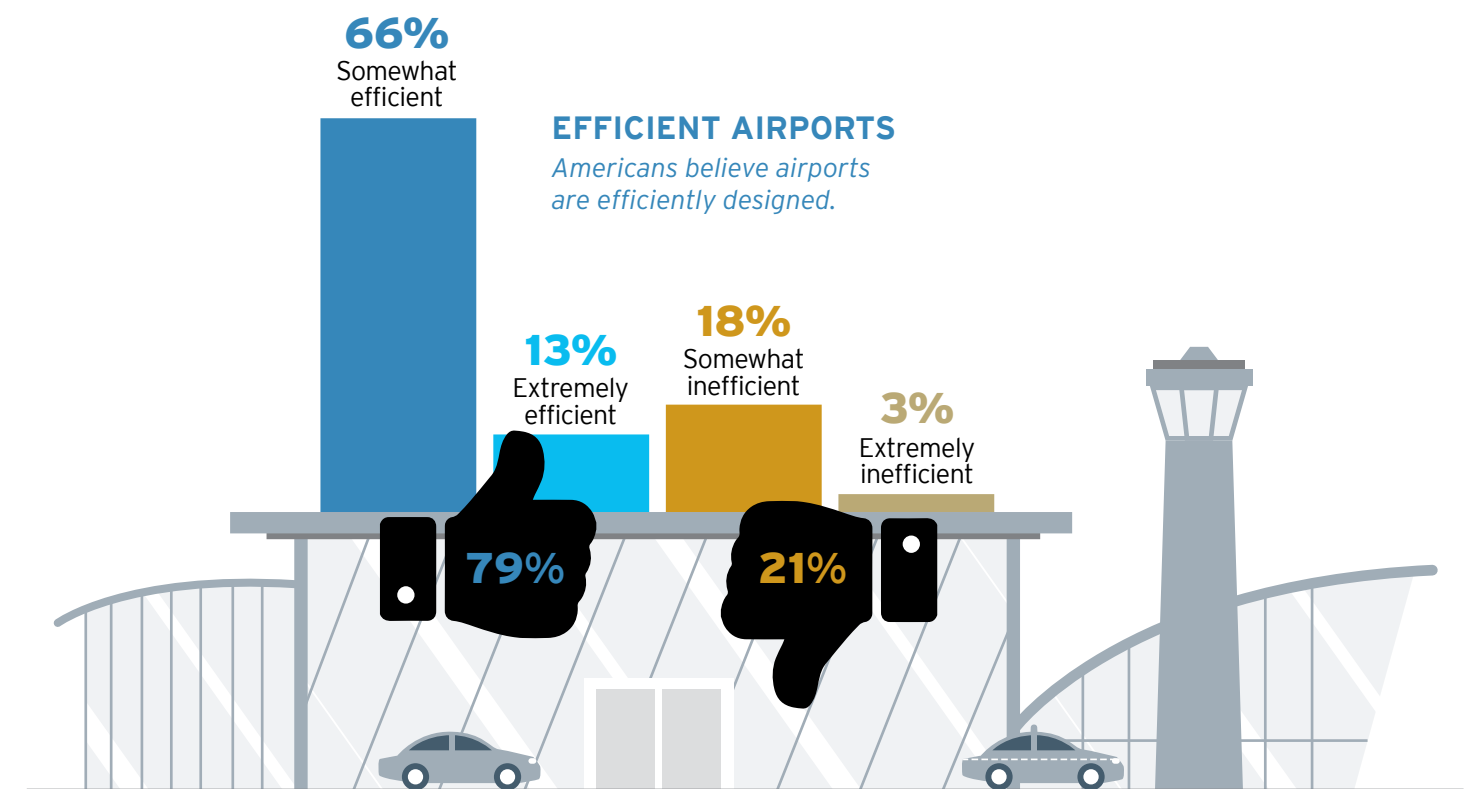
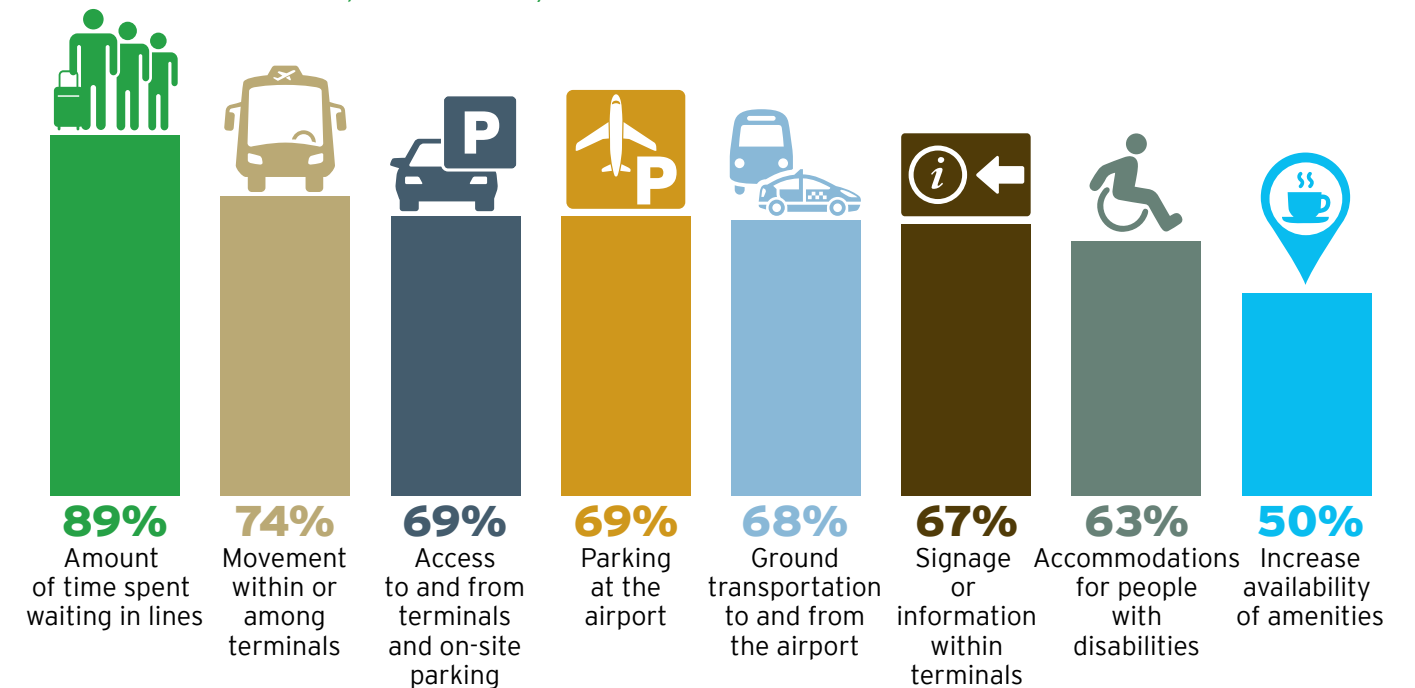
THE AIRPORT EXPERIENCE IS IMPROVING

Air travelers who have flown within the past year are twice as likely to feel their travel experience has improved versus those who have flown in the past one-to-three years.



MORE IMPROVEMENTS TO THE AIRPORT EXPERIENCE ARE DESIRED

Air travelers know the improvements they want to see.



HNTB's America THINKS survey, "Airport Terminals - 2018" polled a random nationwide sample of 1,020 Americans, ages 18+ between March 2 and March 6, 2018. 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 +/- 3.8 percent.

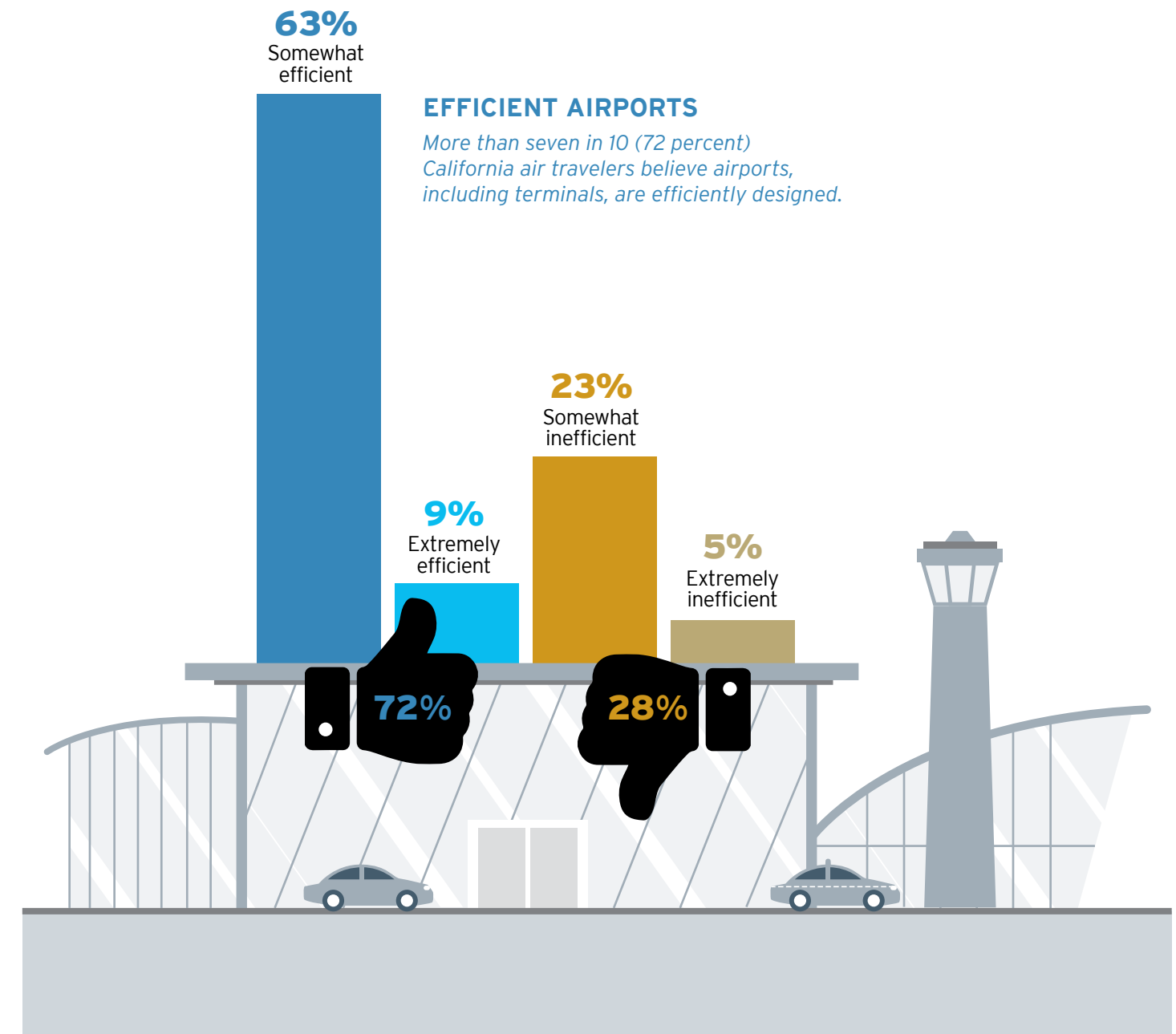
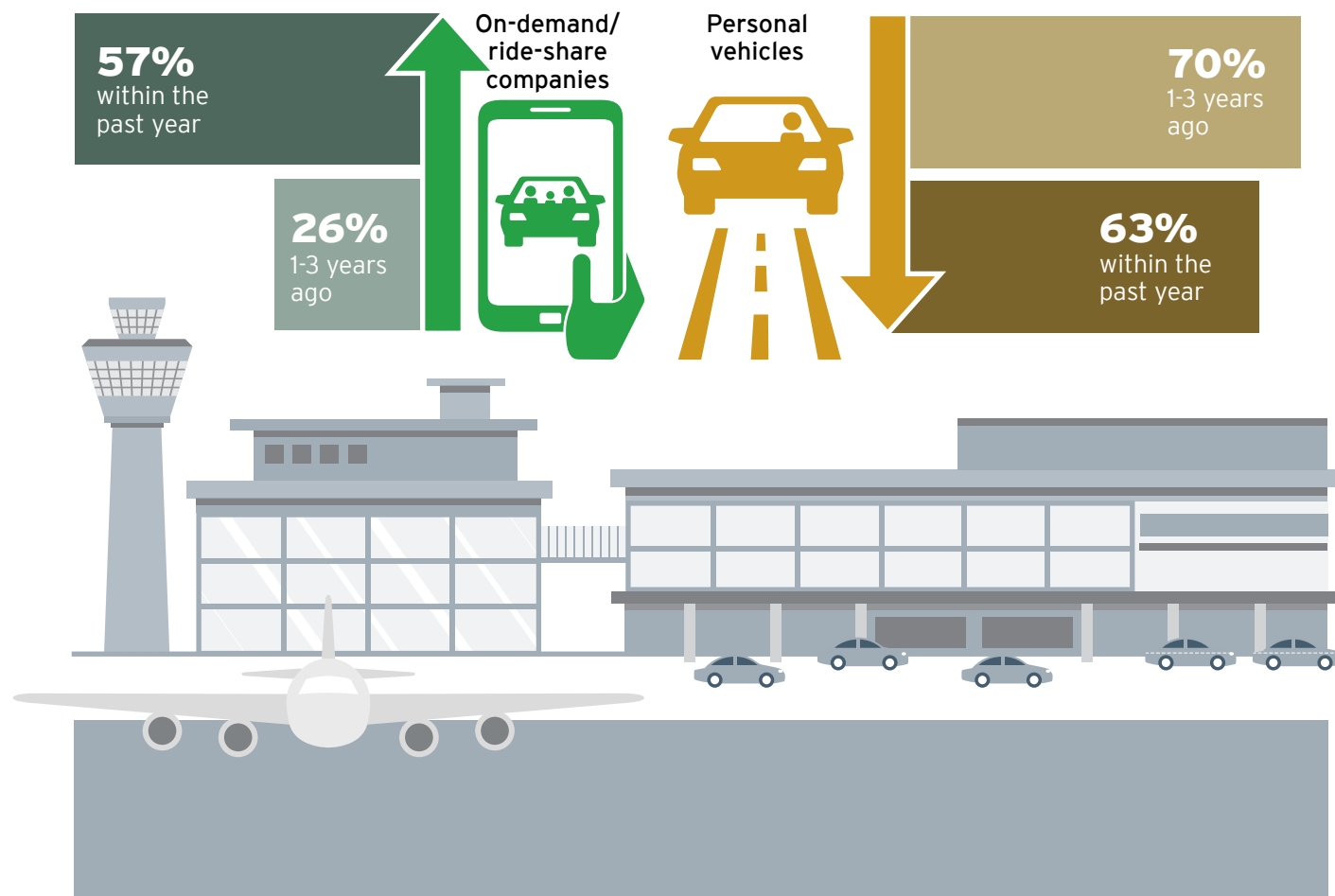
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RIDE-SHARING SERVICES INCREASINGLY USED FOR ACCESS TO AIRPORTS

Whether air travel is for business or pleasure, before ever boarding an airplane, the journey begins with the trip to the airport and the airport terminal experience. While multiple travel options are available, air travelers in California still prefer to begin their trip in a personal vehicle. However, the findings of a new HNTB America THINKS survey of California air travelers identifies a rapidly emerging trend toward the use of ride-sharing services for that travel. The survey also found that Californians feel their airports operate efficiently.

RAPIDLY INCREASING PREFERENCE FOR USE OF RIDE-SHARING SERVICES

Within the past year, the use of ride-sharing services has more than doubled. And among those who use ride-sharing, there is a significant decrease in the use of personal vehicles.



HNTB's America THINKS survey, "Airport Terminals in California - 2018" polled a random nationwide sample of 515 Californians, ages 18+ between March 9 and March 13, 2018. It was conducted by Russell Research using an email-invitation and online survey. The margin of error is +/- 4.3 percent.

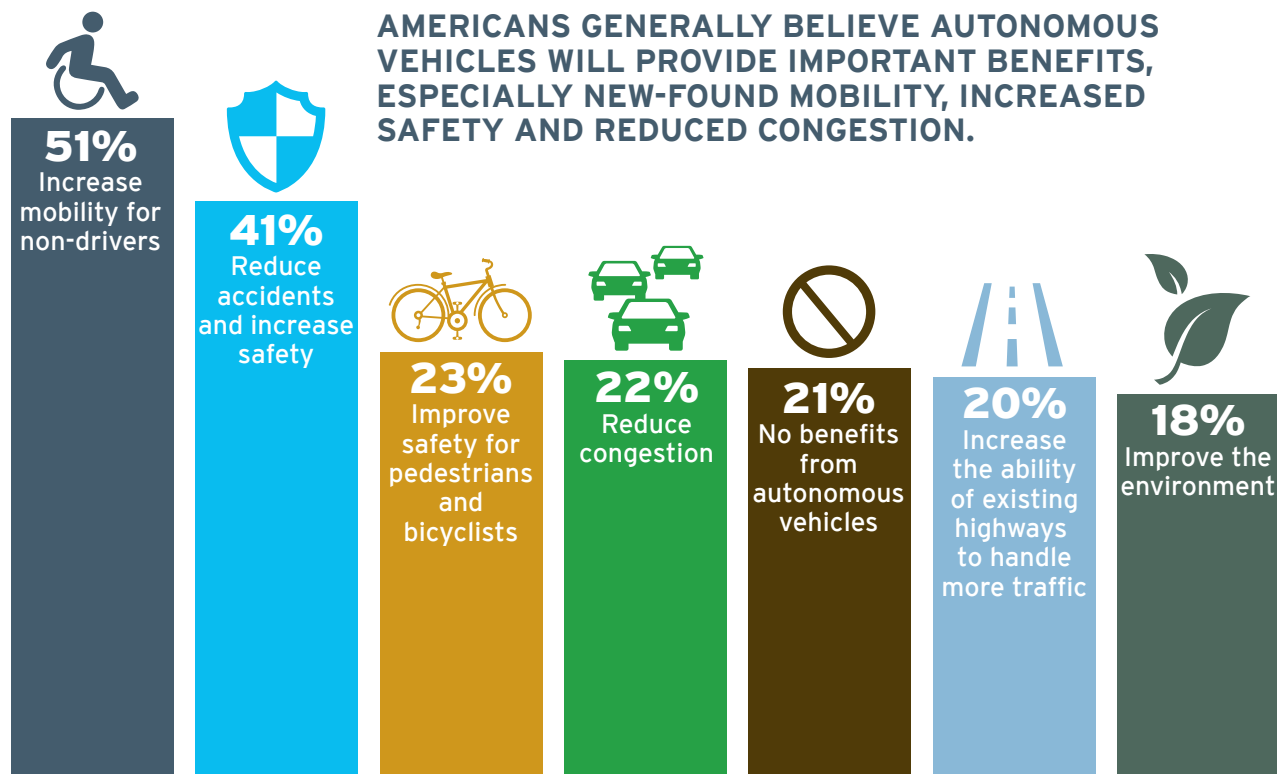
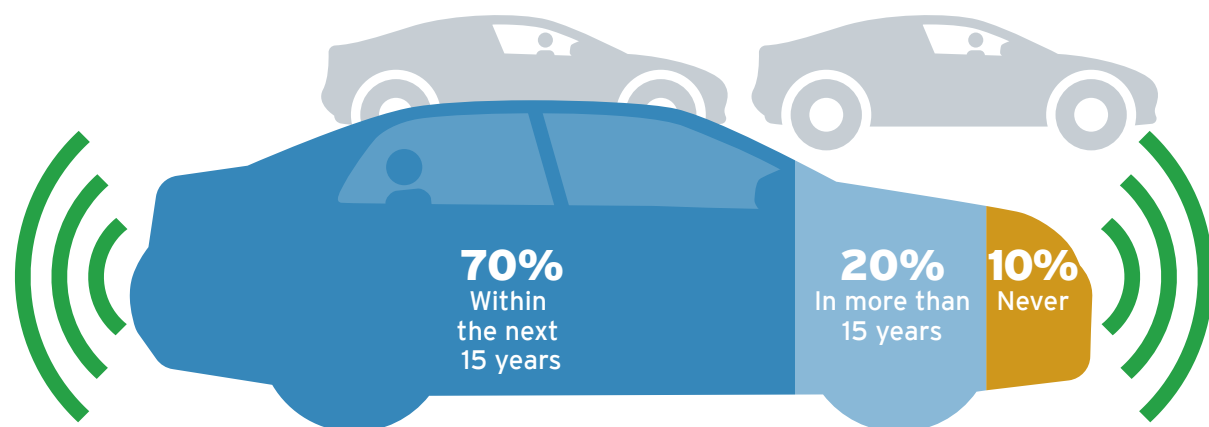
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AMERICANS EXPECT SELF-DRIVING VEHICLES TO BE COMMONPLACE WITHIN 15 YEARS

Within the next 15 years, autonomous vehicles will routinely travel American streets and highways, according to the findings of the latest HNTB America THINKS national public opinion survey. The survey also identifies expected benefits and uses of these vehicles, and further highlights the importance of new, advanced infrastructure that must be implemented to make this technology a reality.

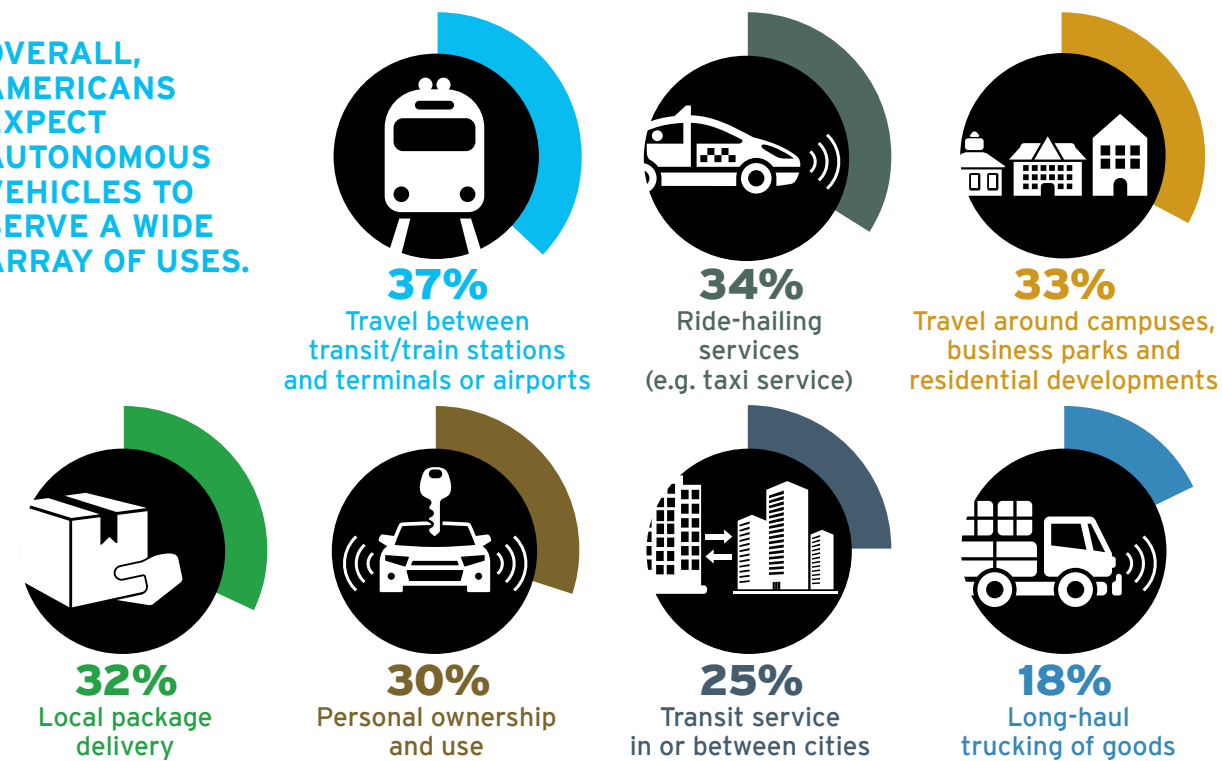
AUTONOMOUS VEHICLES ARE COMING OUR WAY

Seven in 10 Americans expect self-driving vehicles in the foreseeable future.



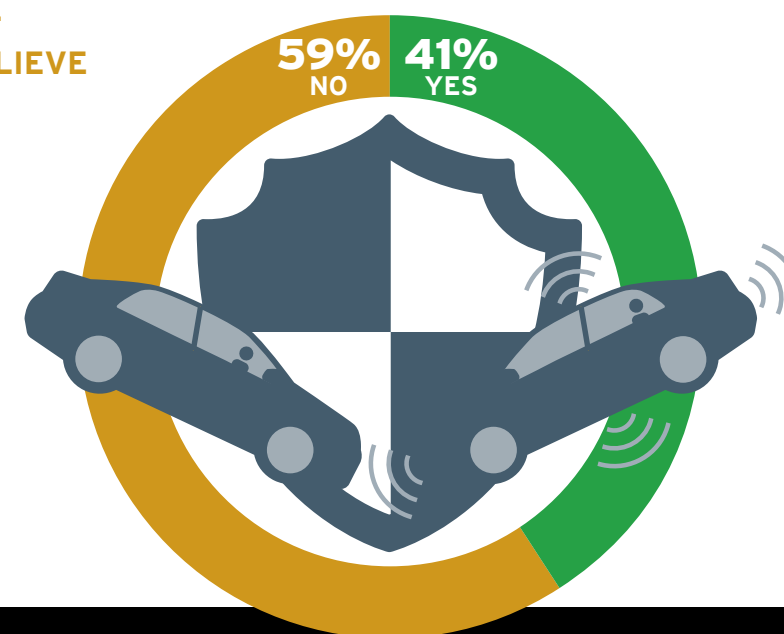
Millennials have different expectations with reduced accidents and increased safety (**49 percent**), improved safety for pedestrians and bicyclists (**33 percent**), and reduced congestion (**27 percent**) to be among the most significant benefits of autonomous vehicles.

OVERALL, AMERICANS EXPECT AUTONOMOUS VEHICLES TO SERVE A WIDE ARRAY OF USES.



Compared to other age groups, seniors believe the most important uses of autonomous vehicles will be for first-/last-mile travel (**52 percent**), mobility within defined areas (**46 percent**) and local package delivery (**46 percent**).

A MAJORITY OF AMERICANS BELIEVE AUTONOMOUS VEHICLES ARE NOT AS SAFE AS VEHICLES OPERATED BY PEOPLE.



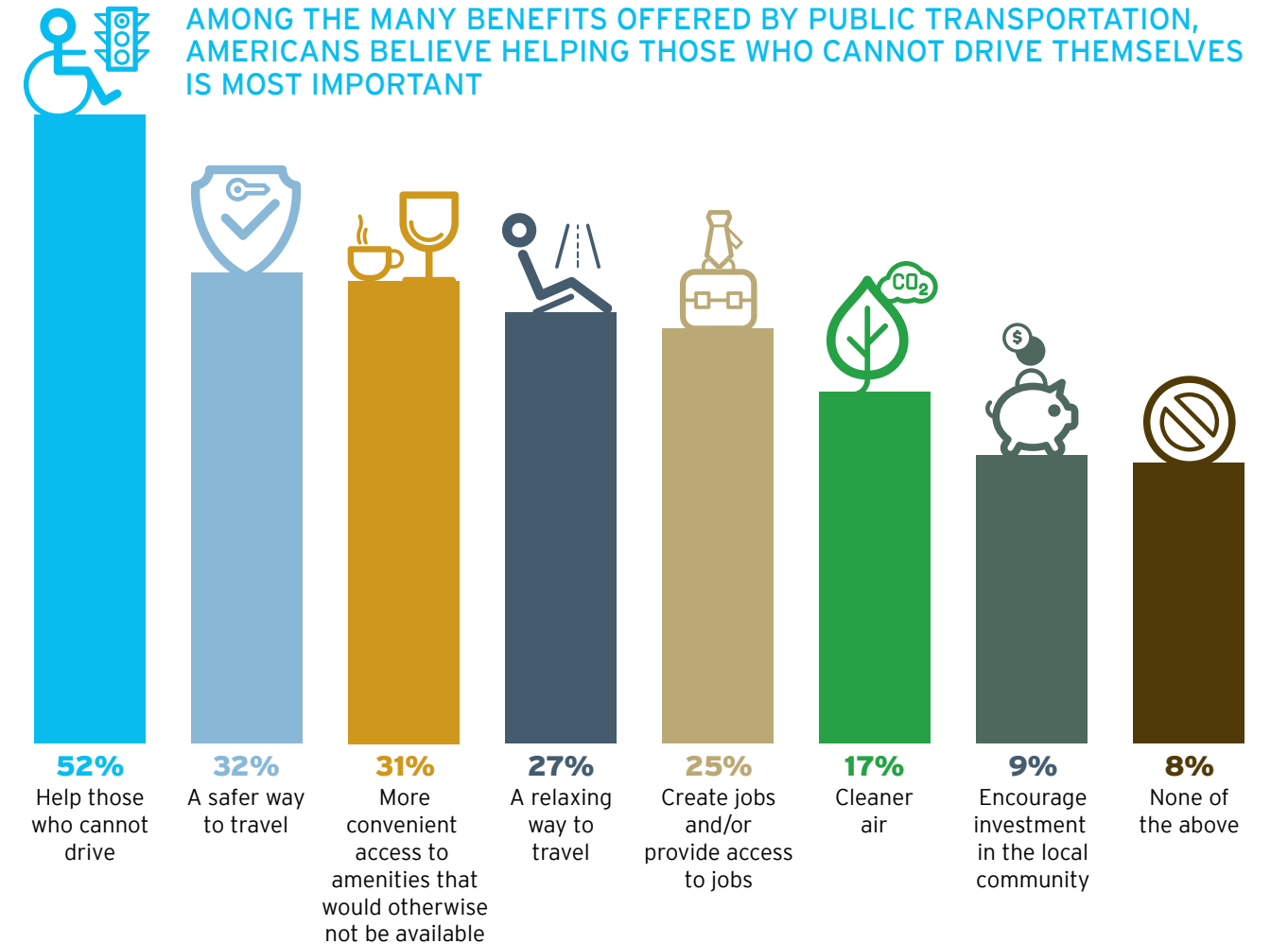
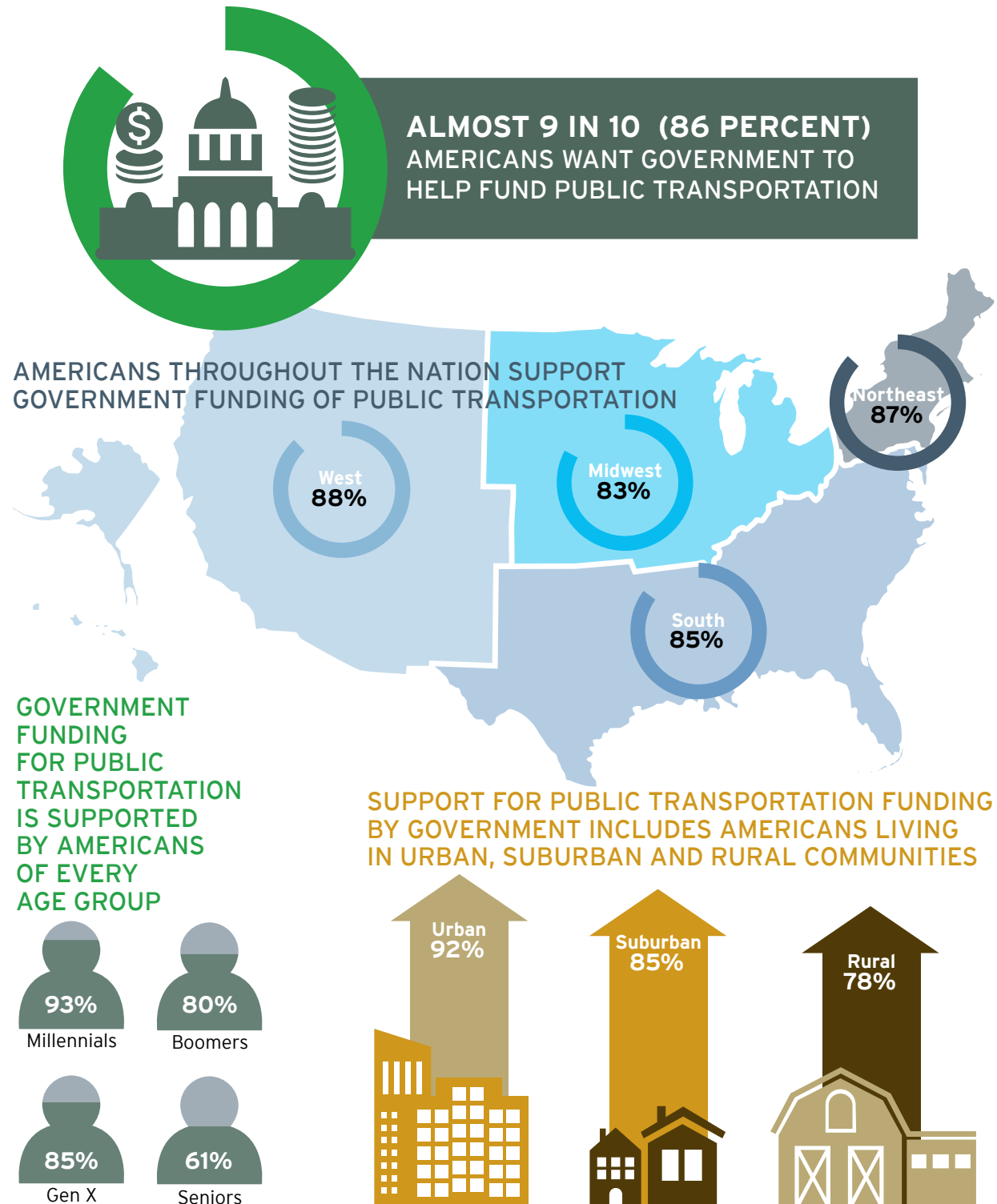
Millennials disagree with every other age group, with **54 percent** who believe self-driving vehicles are safer.

HNTB's America THINKS survey, *The Road to Autonomous Vehicles - 2018* polled a random nationwide sample of 1,010 adults 18 years of age or older from April 27 through April 30, 2018. 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.

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AMERICANS WANT GOVERNMENT SUPPORT FOR FUNDING PUBLIC TRANSPORTATION

Overwhelmingly, Americans believe the government should help fund public transportation. In fact, according to HNTB Corporation's newest America THINKS survey, this support extends across every region of the nation, every type of community and every age group. The HNTB survey also found that among the benefits provided by public transportation, the most important is helping those who cannot drive.

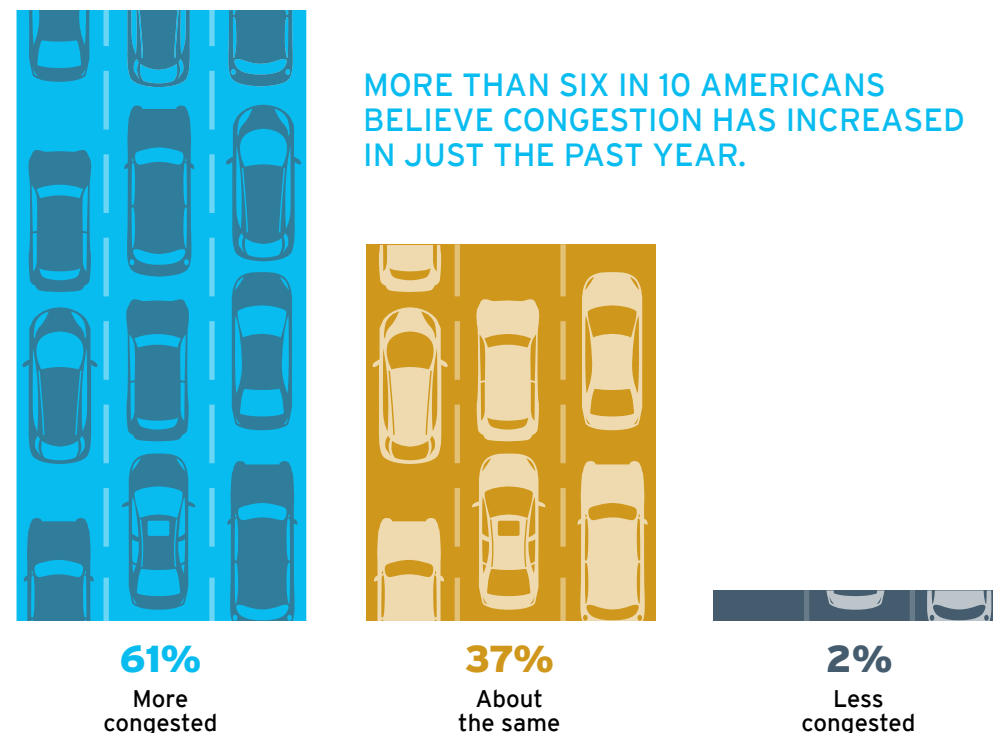


HNTB's America THINKS Public Transportation in the U.S. - 2018 survey polled a random nationwide sample of 1,019 Americans, ages 18 and older, between August 10 and August 13, 2018. Quotas were set to ensure reliable representation of the entire U.S. population ages 18 and over. The margin of error is +/- 3.1 percent.

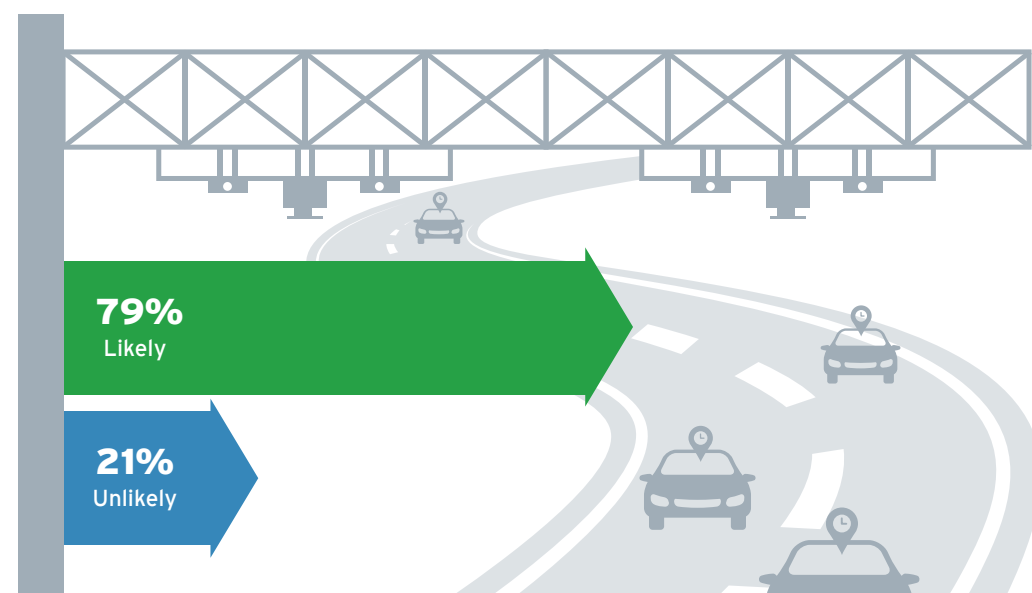
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FRUSTRATED WITH INCREASING CONGESTION, AMERICANS ARE WILLING TO PAY HIGHER TAXES AND TOLLS TO FUND INFRASTRUCTURE IMPROVEMENTS

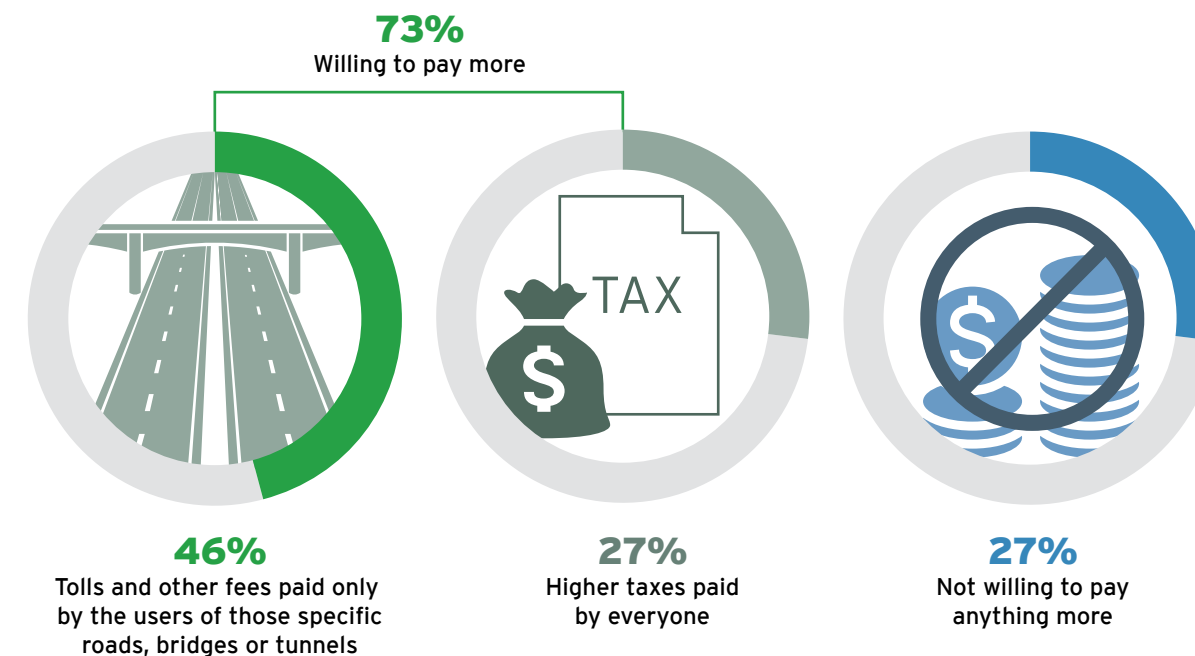
Congestion on America's roads and highways continues to grow. In fact, according to the latest HNTB Corporation America THINKS public opinion survey, Americans report congestion is noticeably worse today than just one year ago. They know improvements to our transportation infrastructure will help reduce congestion. They know funding is needed to pay for those improvements. And, they are willing to pay higher taxes and tolls to build and maintain a high quality, reliable and sustainable transportation system.



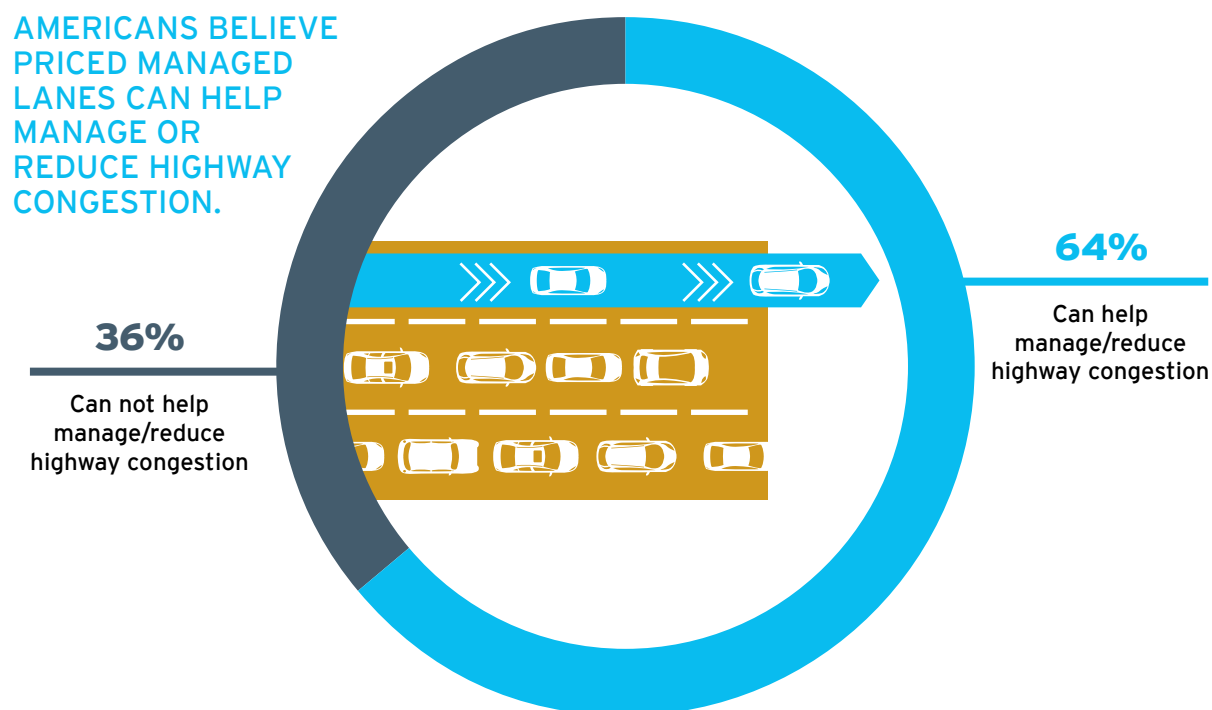
AMERICANS ARE WILLING TO PAY TOLLS TO AVOID CONGESTION AND HAVE PREDICTABLE TRAVEL TIMES, EVEN WHEN FREE ALTERNATIVES ARE AVAILABLE.



TO GET THE TRANSPORTATION SYSTEM THEY NEED AND WANT, AMERICANS ARE WILLING TO PAY HIGHER TAXES AND TOLLS FOR INFRASTRUCTURE IMPROVEMENTS.



AMERICANS BELIEVE PRICED MANAGED LANES CAN HELP MANAGE OR REDUCE HIGHWAY CONGESTION.



HNTB's America THINKS survey, Funding Congestion Solutions – 2018, polled a random nationwide sample of 1,011 Americans, ages 18 and older, between September 14 and September 16, 2018. 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.

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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



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