

CROSS AT THE ROADS

**2014 AIRSAGE ANNUAL
TRANSPORTATION
INDUSTRY SURVEY**

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The power of where and when

LETTER FROM THE CEO

Dear Transportation Professional:

Welcome to the second annual review of the transportation industry.

If we ever wondered whether or not to make this survey an annual event, the overwhelming response to last year's inaugural survey certainly answered the question.

Put simply, people in the industry were very interested in how others used technology, what issues they faced and their priorities.

We're excited once again to have the opportunity to shine a spotlight on the industry and the professionals in it.

This year we not only measured change year-over-year in the industry by asking the same questions as last year, but also explored some new areas.

For the first time, we report on issues broken down by different types of government agencies – local, state and federal – and look at respondents' professional roles. Every year, we hope to expand this survey to provide an even more complete picture of the industry and its people.

What the 2014 survey shows, even more strongly than last year's, is how much people in our industry care about what they do. We're visionaries, imagining every aspect of the future: where and how we live, how we get from place to place, and how we as professionals can anticipate and shape a better, "greener" future.

As professionals, we all want to see vibrant, livable communities served by efficient, eco-friendly transportation systems. We want to make it easy for people to be good stewards of our natural resources and still be able to work, learn, play and travel the way we want.

We were again struck by the openness, honesty, and willingness to share from transportation professionals at every level. Hundreds of people shared, not only their opinions, but insights, predictions and analysis that not only benefitted this survey, but will help advance the industry as a whole.

Speaking of benefits, we continued a practice that began last year. We asked you to choose a charity to support, and this year you voted to support the Institute of Transportation Engineers once again. Thanks to you, AirSage will make a contribution for each completed survey.

Once again, thank you for taking the time to respond to our annual survey and to share your thoughts and opinions. Together, we can continue to improve an industry that touches so many lives every day.

Thank you,

Cy Smith
Founder and CEO
AirSage



Cy Smith
Founder and CEO

HELLO, ME

TRANSPORTATION PROFESSIONALS LOOK AT THEMSELVES

Welcome to the second annual in-depth look at the transportation industry and the professionals in it.

This year we received three times the responses from 2013, giving us even greater insights into the future of transportation as seen through the eyes of both private-sector and government professionals.

We also broke out different types of government employees, rather than reporting as a group. Among survey participants, we noticed far more respondents work for local or state governments than for the federal government.

Those professionals, as it turned out, were likely to be older: Younger people gravitated towards private companies and non-profits, while the majority of older respondents tended to be government employees.

For many respondents, their feelings about technology, housing, social media, innovation in their organizations, and the future of transportation can be summed up in the comments of one transportation planner:

"The transportation industry is going to radically change in the next decade."

Please take a look at some of those predictions, as well as other fascinating insights into the industry we're all proud to share.

One note: Due to rounding, and in some cases the option of choosing multiple answers, responses may not add up to 100%.

ABOUT LAST YEAR...

This is an industry with no shortage of opinions. Since we had no idea how last year's survey, the first of its kind, would be received, we were thrilled to receive the following feedback:

"Very interesting and thought-provoking, especially for those of us over 55."

"I'll participate next year. Thanks for the great info and format!"

"Excellent snapshot of current thought trends in the industry. THANK YOU for framing questions in a fresh, provocative way. I would be happy to participate in next year's survey."

"Nice job!"

"Great survey, look forward to participating next year."

"Great survey. Interesting findings. Great graphics! I would like to participate in the next survey. Thanks!"

"Most interesting and timely."

"Very nicely presented. Thank you."

"The AirSage Transportation Survey offers unparalleled insight into the current state of transportation industry thinking and its evolutionary path envisioned by trade professionals. It uncovers some interesting findings that show different perspectives on transportation and how the field is changing. As the industry tries to navigate the current fiscal crisis, this survey will help illuminate the path forward for the decision-makers in both the public and private sectors."

- Andy Palanisamy, Founder & Editor,
TransportGooru.com

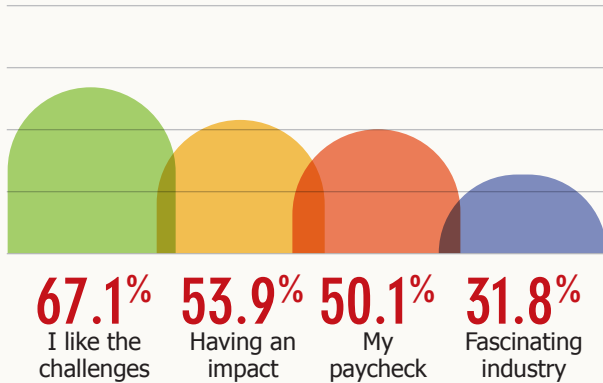
WHAT GETS YOU GOING?

Money remained only the third most important reason to go to work. Tackling daily challenges is still the number-one reason to get out of bed in the morning. **Having an impact on people's lives**, a new choice this year, was a distant second. Federal workers in particular were driven by the impact they have on people's lives, with a whopping 85.7% naming it their top motivation. Oh, and a note to stat hounds: last year respondents were limited to one response; this year they could choose up to three.

(BESIDES CAFFEINE)

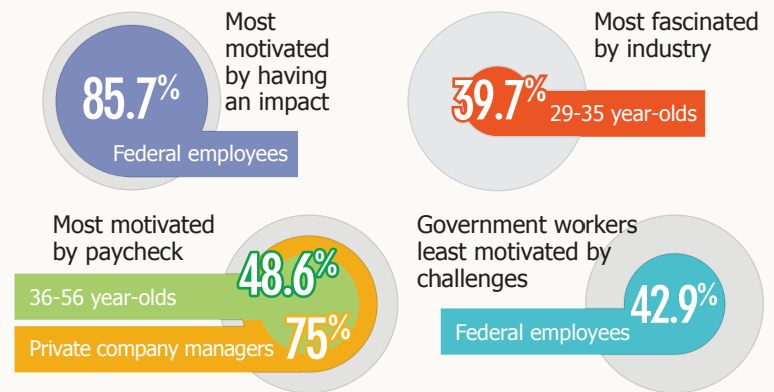
YOU NEVER BACK DOWN FROM A CHALLENGE...

What motivates transportation people to go to work



BECAUSE YOU'RE FROM THE GOV'T AND YOU'RE HERE TO HELP.

Differences in motivation by age and employer



25.5%

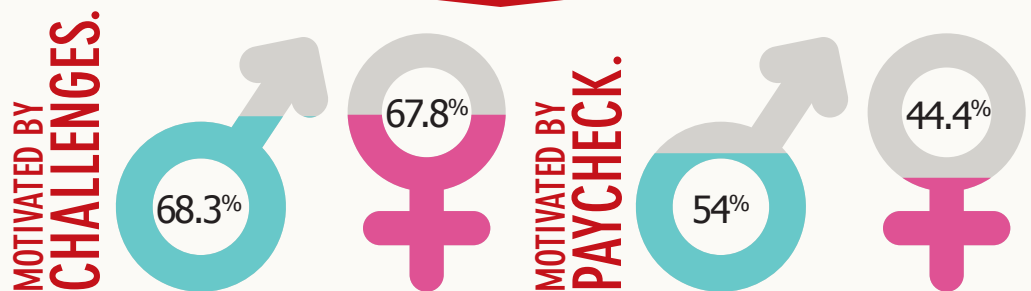
NO LOVE LOST

Think your co-workers love you? Only 25.5% named "I enjoy my co-workers" as a motivating factor.

"Having an impact on the environment and the field."

BOB ACCEPTS THE CHALLENGE OF BRINGING HOME THE BACON.

Differences in motivation by gender



"I've fallen into it via career change - have not been able to find a way out!"

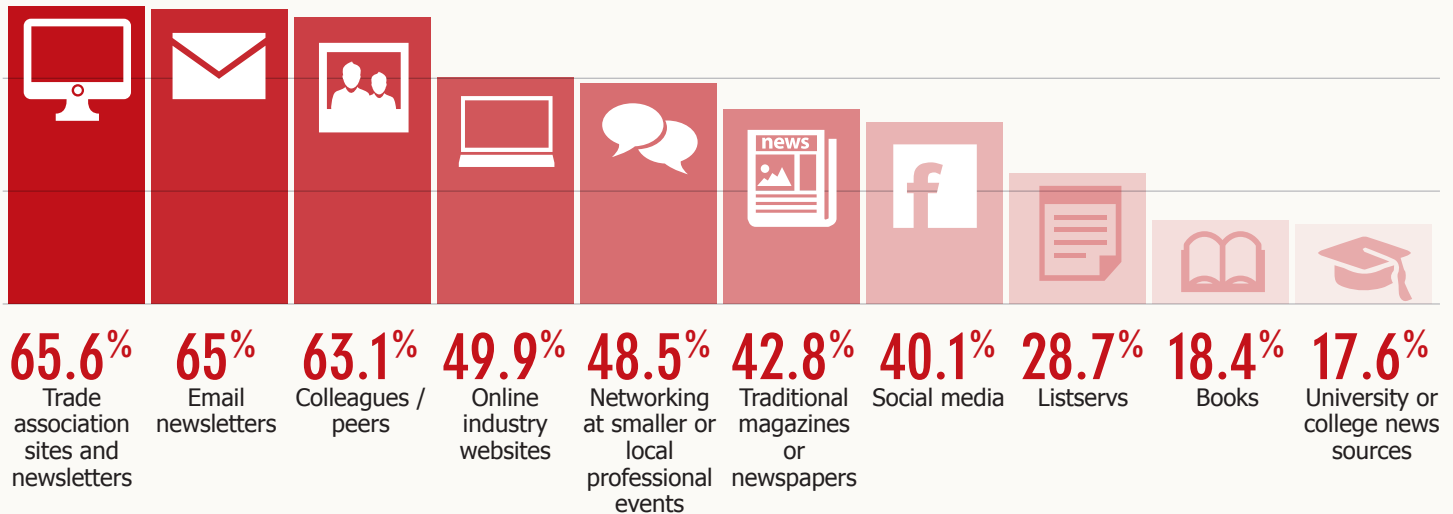
HOW YOU KNOW WHAT YOU KNOW



Trade association websites and newsletters kept their number-one ranking as information sources from last year, but there was quite a shuffle in the rest of the list. **You're listening to colleagues and peers more** and reading traditional magazines and newspapers less. Social media remains important, more so for women (51.7% use it) and younger people (63.9%).

YOU PREFER TO GET NEWS FROM TRADE SITES AND NEWSLETTERS, BUT YOU LIKE PEOPLE, TOO.

Primary sources of industry information



WOMEN ARE SOCIAL, MEN LIKE WEBSITES, AND OLD HANDS CAN'T DO WITHOUT EMAIL.

Differences in information sources by age, gender and experience



67%
Women favor colleagues/peers



68.8%
Men favor trade association sites/newsletters and email newsletters

28⁺
YEARS OLD

63.9% Favor social media



13⁺
YEARS EXPERIENCE

72.4% Favor email newsletters

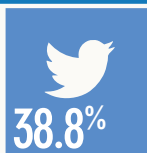
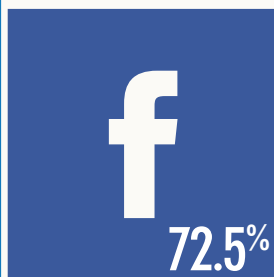
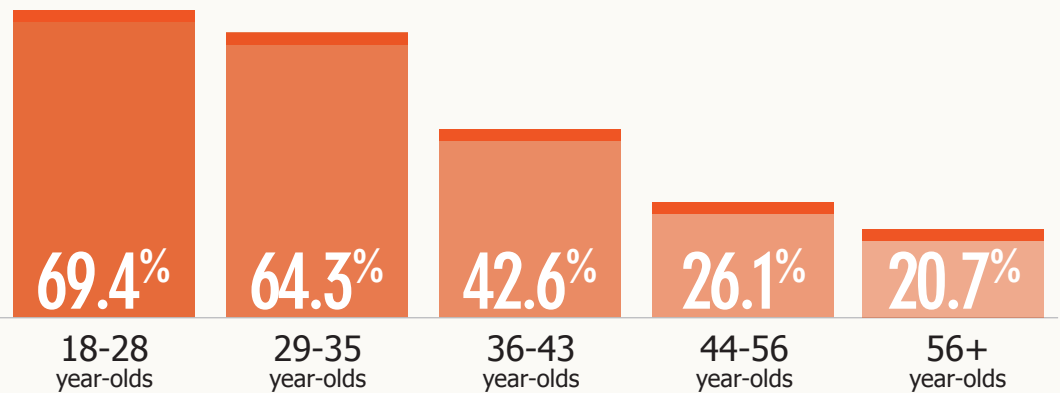


LINK, POKE & TWEET

Compared to 2013, you still like social media, especially if you're younger. No surprise there. And you're certainly a more active virtual social butterfly if you're female. Students are all over Facebook, so apparently there's more to it than cat pictures. Some of you, though, have short attention spans: **4% of respondents say they use Snapchat for professional information sharing.** We'd love to know how.

YOU CAN'T LIVE WITHOUT YOUR DAILY DOSE (IF YOU'RE YOUNG).

How many respondents use social media at least once a day



YOU'RE JUST AS SOCIAL AS YOU WERE LAST YEAR.

What social media they use

In fact, feel free to share these results right now on the following networks:

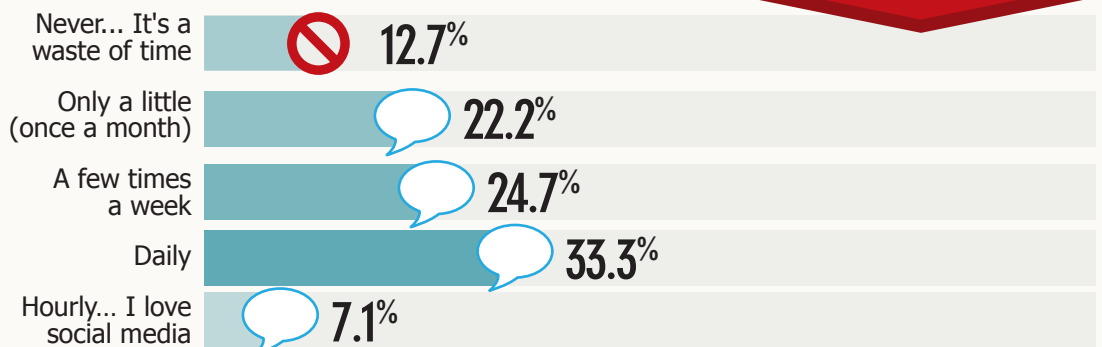


DON'T TWEET ME, BRO

Men leave Twitter to the women, and the over-36 crowd doesn't tweet much.

BUT SOME OF YOU SHUN IT.

How often they use social media



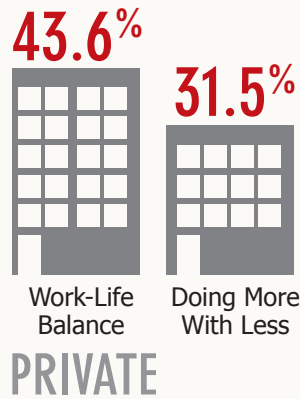
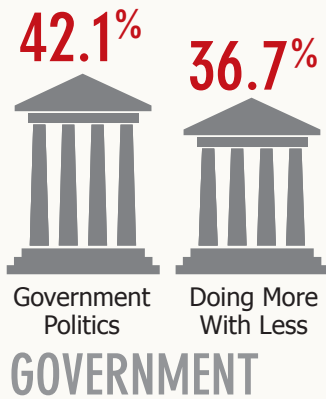
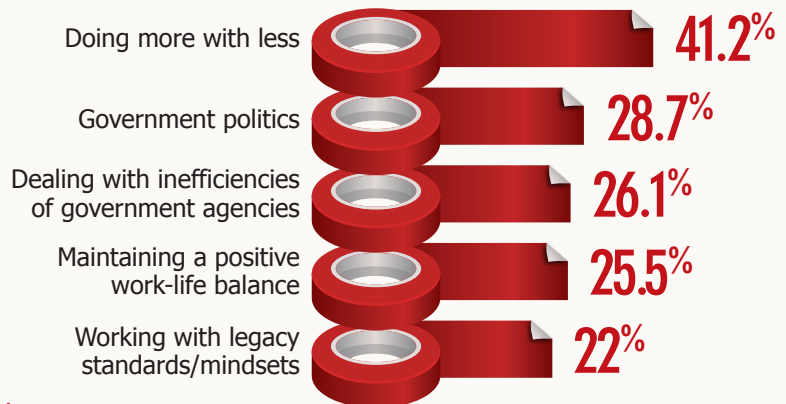
RISING TO THE CHALLENGE

The more things change, the more they stay the same: transportation professionals struggle to do more with less, just as they did last year.

Dealing with government politics and government agencies challenges everyone, both in government and private industry, as does balancing work and the rest of life. Government employees, though, worry less about developing new business.

YOU'D LIKE MORE RESOURCES, LESS RED TAPE AND A POSITIVE WORK-LIFE BALANCE.

Top challenges at work



GOVERNMENT POLITICS ARE A BIG DEAL (ESPECIALLY IF YOU'RE IN GOVERNMENT).

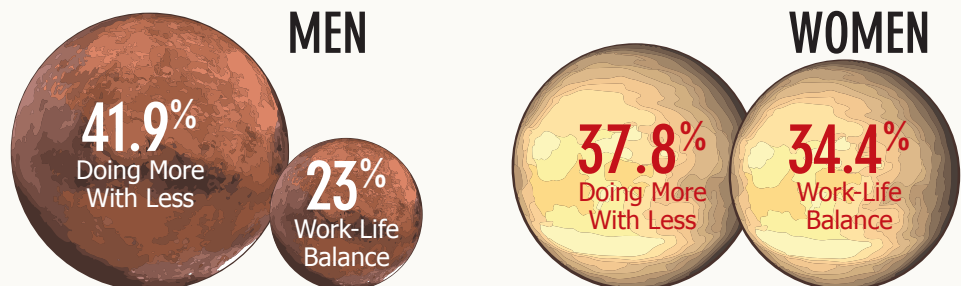
Top challenges for government vs. private industry

"ISN'T IT ALWAYS LIKE THIS?"

Professionals with less than five years of experience don't see "doing more with less" as a problem, probably because that's all they've ever known.

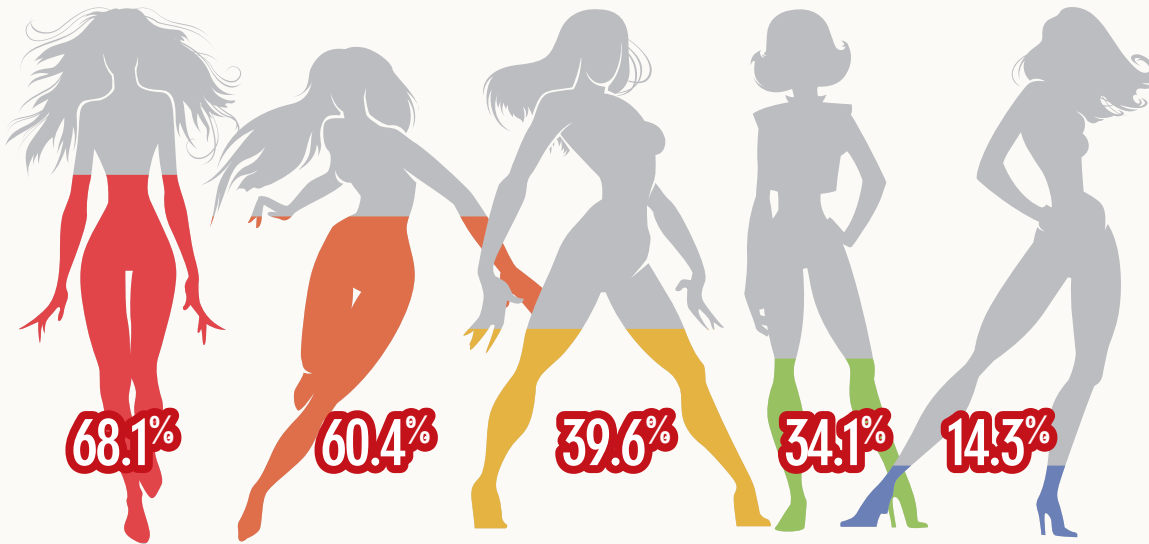
MAYBE IT ISN'T SO VENUS AND MARS.

Top challenges for men vs. women



WOMEN IN TRANSPORTATION

Women still **face the lack of female role models in the upper echelons**, as well as the glass ceiling. Unequal pay is a challenge in private industry, and chauvinism affects the public and private sectors. Will that change as more women and younger people join the industry? One would hope.



ROLE WITH IT

Younger women are particularly hungry for role models: 80% of women under 35 find the lack of women in upper management frustrating.

Male dominated/
few female role
models

"Glass ceiling"/
hidden challenges

Unequal pay

Chauvinism/
overt issues

No gender
challenges

THERE ARE STILL CHALLENGES ONLY WOMEN FACE.

Top challenges for women

"Inappropriate comments by males at the workplace are common."

AND THEY HAVE PLENTY TO SAY ABOUT IT.

Comments

"There is no clear path for combining motherhood and work."

"There's a struggle between being a professional and a mother (especially pregnancy)."

"You are still looked at as a secretary."

"There aren't great differences at the lower levels, but it's harder for women to get to the top of the heap."

"Women are kept in the 'pink collar' positions."



INNOVATIVE?

SOMETIMES

YOU'RE NOT GENERALLY WILD AND CRAZY...

How traditional or cutting edge professionals are

3.5%
Proven methods

8.8%
Need to see valid evidence for something new

64.2%
Combination of tried-and-true and innovative options

22%
Cutting edge, out of the box

The middle of the road holds even more allure, with an increase of nine percentage points in organizations that are sometimes traditional, sometimes progressive, and an increase in individuals who favor that combo as well. **Thinking out of the box tumbled in popularity** from last year, though 29-35 year-olds were one-third more likely to consider themselves cutting edge. As you might imagine, private companies (26.4%) and non-profits (28.6%) feel they're more cutting edge than their government (18.9%) and educational (13.0%) counterparts.

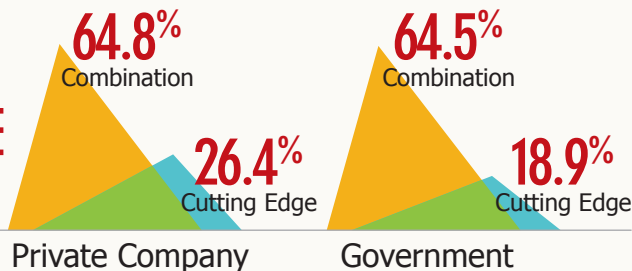
THOUGH YOU MIGHT BE IF YOU'RE YOUNGER...

Breakdown by age

MOST CUTTING EDGE:	29-35 YEAR OLDS	
LEAST CUTTING EDGE:	44-56 YEAR OLDS	
MOST WANTING EVIDENCE:	36-43 YEAR OLDS	

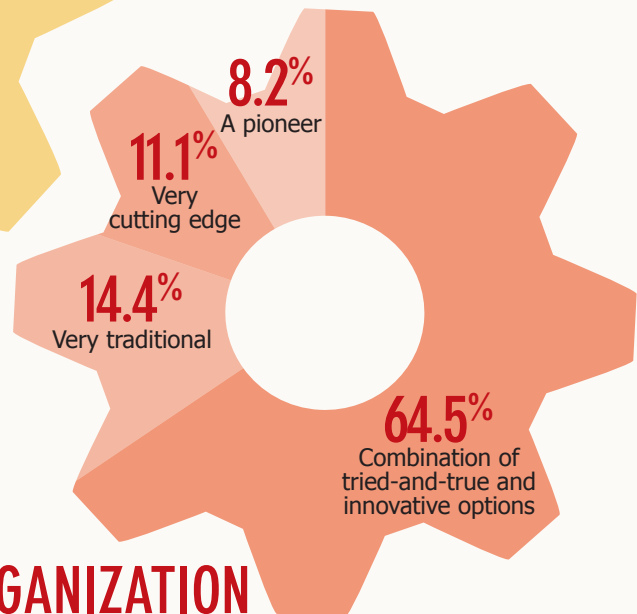
UNLESS YOU WORK FOR THE GOVERNMENT.

Breakdown by type of business



YOUR ORGANIZATION FEELS THE SAME WAY.

Innovation of organization



WHO'S OUT OF THE BOX?

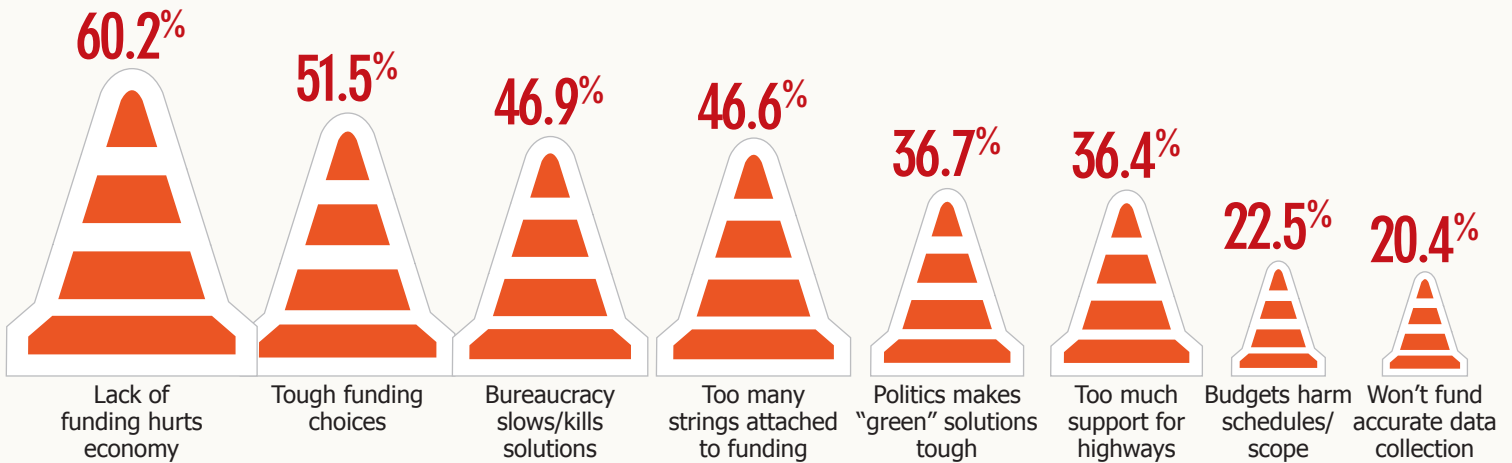
In private companies, transportation planners (47.4%) and managers (37.5%) see themselves as the most cutting edge.

POLICIES & POLITICS

When it comes to stimulus, there's wide **agreement that a lack of government funding for transportation hurts the economy.** Everyone recognizes that government has to make tough choices, but all too often those choices come with strings attached.

FUNDING AND BUREAUCRACY ARE REAL ROAD BLOCKS...

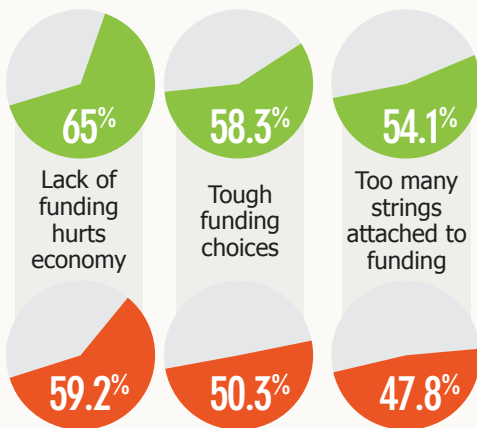
The effects of government policies and politics



NO MATTER WHO YOU WORK FOR...

Breakdown by type of business

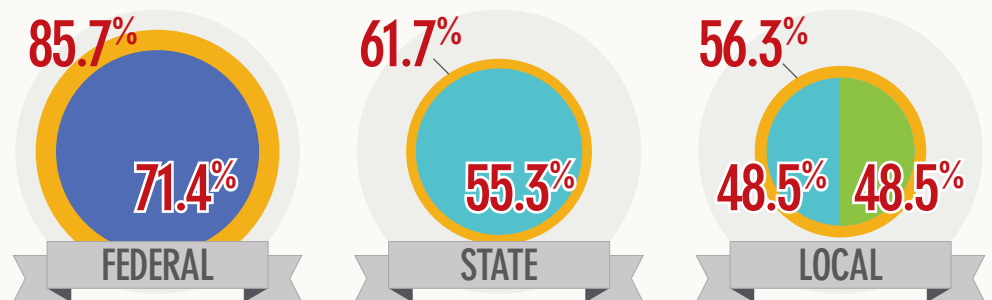
PRIVATE COMPANY



GOVERNMENT

THOUGH THAT DEPENDS UPON YOUR AGENCY.

Breakdown by type of government agency



- Lack of funding hurts economy
- Bureaucracy slows or kills solutions
- Tough funding choices
- Too many strings attached to funding

"&@\$&#!!"



ROAD RAGE

Local/regional agency employees (44.7%) are much more likely to accuse government of favoring highways than state employees (19.2%).

TECHNOLOGY

TRANSFORMING THE INDUSTRY

No one embraces new technology and the big data it can provide unconditionally, but enthusiasm for technology almost exactly mirrors the age of the transportation professional. This certainly isn't shocking news. What is a surprise is how many in the **industry struggle to balance data collection with privacy issues.** Even the government workers don't want to be Big Brother.



YOU HAVE TO GROW UP WITH NEW TECHNOLOGY TO EMBRACE IT...

Attitudes towards new technology

	Very skeptical	Leery	Will sometimes use	Strongly prefer
UNDER 29	0.6%	1.3%	14.3%	83.8%
29-35	0.6%	0.6%	38.8%	60%
36-43	0.6%	9.2%	69.9%	20.3%
44-56	4.1%	39.1%	48.6%	8.2%
57+	26.4%	38.7%	28.9%	6%

THOUGH LOTS OF FOLKS ARE WILLING TO GIVE IT A CHANCE...

18-28
YEAR OLDS

"Most company senior engineers at my company don't understand big data, so they're skeptical when they see inconsistencies or massive raw data."

"In our industry, I think all age groups look for more data."

29-35
YEAR OLDS

44-56
YEAR OLDS

"Technology developments are moving WAY faster than our acceptance and use of technology."

"Of course there are Luddites among older engineers, but in today's world you need to use technology."

56+
YEAR OLDS

AND MOST SEE IT AS THE FUTURE.



"We're seeing a transformation with big data. Soon with automated vehicles we'll have mega data, and no one seems to understand just how huge that will be."

"There is certainly a lot more data for much cheaper with new technology. The challenge is to manage the data and know its limitations."

"The real-time data can help identify specific travel patterns in a way that allows more immediate adaptation of programs for alternative commutes."

"I believe we have better control over the quality of the data in the traditional methods."



I'D LIKE TO SEE...

Will the car continue to dominate transportation planning, or will other ways of moving (and living) take over? **Government workers want to see new public policies and priorities**, including an adoption of strategies that have been proven elsewhere.

(GOVERNMENT)

YOU HAVE A WISH LIST...



THIS FUTURE IS ALL OVER THE MAP

- ✓ Professionals over 44 favor new taxation policies, while the under-35 set and women would most like to see more bicycle, pedestrian and transit projects.
- ✓ Federal planners want faster and cheaper access to data, while the state employees favor different taxation policies.

- 59.8% Tax policies that would fund transportation projects more
- 54.4% More bicycle, pedestrian and transit projects
- 54.4% Visionary government that supports innovative transportation
- 47.9% Reduced infrastructure costs utilizing more efficient transportation
- 46.2% U.S. to emulate other countries' successes
- 45.6% Faster and cheaper access to data for better planning decisions
- 45% High-speed rail (and other new forms of transportation)

AND AN OPINION.

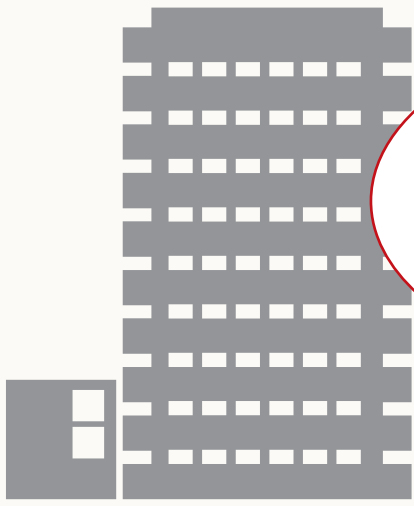
"A sustainable transportation funding policy at the federal level."

"I think we have a long way to go since people are mistrustful of automated vehicles and developers seem to be building just for the rich."

"A recognition that transportation infrastructure is the backbone upon which our entire society is built."

"By fits and starts, I do believe some progress is being made."

"Mostly we act as if the car will and should continue to dominate the discussions."



I'D LIKE TO SEE...

Private company transportation professionals live and die by funding and government policies, and many would like to see changes in that area. Not surprisingly, many also commented on the frustrations of dealing with government red tape.

(PRIVATE SECTOR)

YOU HAVE A VISION...



55.2%

Visionary government that supports innovative transportation

53.6% 51.2%

Tax policies that would fund transportation projects more

More bicycle, pedestrian and transit projects

50.4%

Faster and cheaper access to data for better planning decisions

48%

More efficient and effective ways to work with the government

44.8%

Reduced infrastructure costs utilizing more efficient transportation

40%

High-speed rail (and other new forms of transportation)



RAILING AGAINST ROADS

Private company managers overwhelmingly (75%) would like to see more high-speed rail and other new forms of transportation in the future.

AND A STRONG OPINION.

"Produce a transportation system that actually addresses basic transportation/mobility needs of the public."

"More focus on operations than on capital infrastructure in order to provide smarter, leaner, cheaper transit."

"Less government red tape to get needed projects constructed."

"Transportation funding policies that keep up with needs."

THE TRANSPORTATION CRYSTAL BALL

Everyone agrees that change is necessary and inevitable, but not everyone agrees on what that change should be. Some want a radical redesign, some want a combination of old and new thinking, and some want to expand what we already have. Most, though, agree with the private company employee who said, **“The transportation industry is going to radically change in the next decade.”**

54%

Optimize existing transit and add new options

62.5%

Connect transportation planning and land/use development more tightly

56.5%

Dense neighborhood clusters connected by transit and multi-use roads

41%

Optimize existing transportation systems; don't build new



23.5%

Redesign transportation to allow for smart, automated vehicles

Expand road networks, provide more bus and bicycle lanes

20.3%

9.5%

Expand current roads; people prefer the traditional suburban neighborhood.

**YOU SEE MANY
POSSIBLE FUTURES...**

AND REALLY WANT TO TALK ABOUT THEM.

“Redesign existing streets for shared use.”
—Local/regional gov’t employee

“The industry should adapt to changing societal views and demands for transportation.”
—Private company employee

“Teach people about options and skills to make more effective use of the existing systems.”
—State gov’t employee

“Local funding of transit systems based upon LOCAL desires not federal mandates.”
—Private company employee

BETTING THE HOUSE



The way people live, especially in urban areas, seems to bring out the cynicism—or is that realism?—among transportation professionals. **What the future of housing should be, and what you felt it probably will be, didn't really match up.** Some feel that the transportation industry should lead the way, while others believe in giving the people what they want.

THERE'S HOPE, AND THEN THERE'S REALITY.

What SHOULD vs. what WILL happen with housing

WILL vs. 2013		WILL vs. SHOULD	SHOULD vs. 2013	
18%	-13%	Traditional, single-family homes in a suburban development will continue to dominate at a high majority	7%	-5%
32%	+19%	Dense, medium- to high-rise, mixed-use residences will be more common	37%	+10%
19%	+6%	Low-rise, mixed-use-, or row-house developments in transit-oriented neighborhoods will become the norm	39%	+9%
32%	-11%	Single-family homes will continue to be built, but they will be smaller in size on smaller lots, and will be oriented around more community features	17%	-14%

AND THERE ARE PLENTY OF OPINIONS ABOUT BOTH.

"Of the four cities you cited, one of them stands out as quite different from the others. Kind of biases the question."

"This will be based on land use policies adopted by the different areas; Atlanta and Portland, for instance, will continue to develop quite differently."

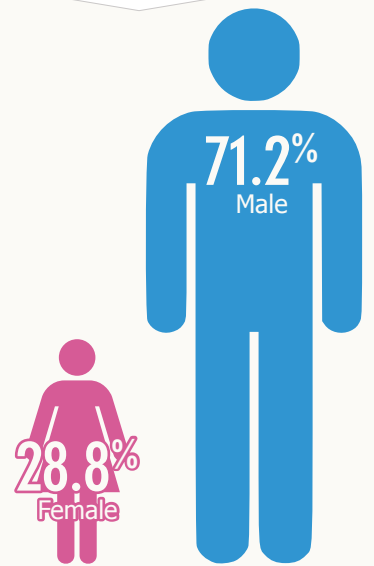
"I think people should be allowed to live in any style they want."

"Actually I think there will be a mix of trends depending upon community characteristics (urban/suburban/rural)."

"Industry and transportation should lead the way rather than housing. You build it, and the people will come."

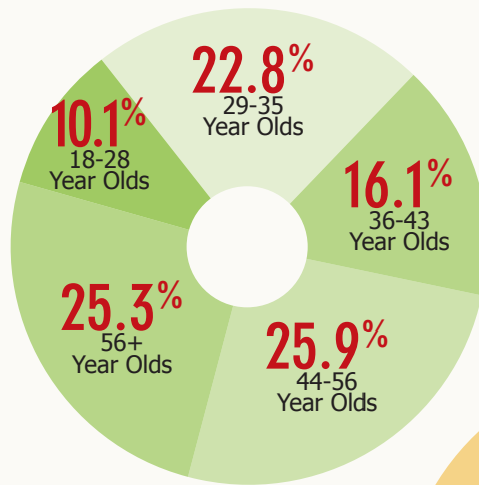
WHO TOLD US

Everyone from long-term veterans to college students and interns



MORE MEN IN THE INDUSTRY (AND THE SURVEY).

THIS IS AN ALL-AGES SHOW.



NO EXPERIENCE REQUIRED. (BUT MANY VETERANS PITCHED IN.)

56.4%
13+ Years

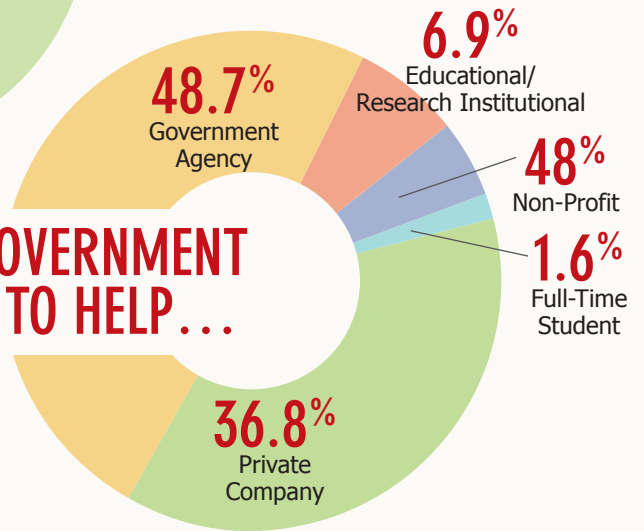
22.5%
6-12 Years

10.9%
3-5 Years

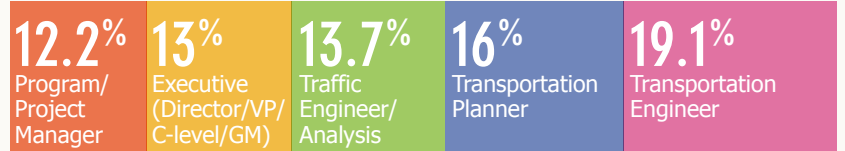
7.9%
1-2 Years

2.4%
New:
In school/
internship

THE GOVERNMENT CAME TO HELP...



AS DID ALL TYPES OF PRIVATE-SECTOR PROFESSIONALS.



CAN WE COUNT ON YOU NEXT YEAR?

The more you participate, the better this survey will reflect everyone in the industry. This year we had three times as many participants as last year. Can we get a similar boost next year?

As you know, more data is always a good thing (if it's good data). Please email us at productteam@airsage.com to join the list for next year's survey, and then watch your email next spring for your survey invitation.

All surveys are anonymous, and more participants will better represent the entire industry. Is there a question you'd like to see asked next year? Or do you have feedback? Please get in touch by [clicking here](#).

LAST YEAR'S SURVEY

If you'd like to see the 2013 survey, it's yours with [just one click](#).

A LITTLE ABOUT AIRSAGE

Founded in 2000, AirSage pioneered the use of anonymous, rich data from wireless devices to help predict time-of-day traffic patterns. Today, AirSage provides accurate population and location analytics for:

- Transportation and transit
- Travel and tourism
- Consumer and market research

AirSage has the widest coverage of any real-time location-based service provider in the country. We collect and analyze real-time mobile signals to produce more than fifteen billion anonymous locations every day. By turning every mobile device (cell phones, tablets, PDAs, etc.) into a mobile data sensor, AirSage provides unmatched scale and accuracy, while fully protecting user privacy.

Private businesses, government agencies and other organizations can use this aggregated information to model, evaluate and analyze the location, movement and flow of people and assets.



**FEEL FREE TO SHARE
THESE RESULTS RIGHT
NOW ON THE FOLLOWING
NETWORKS:**

