

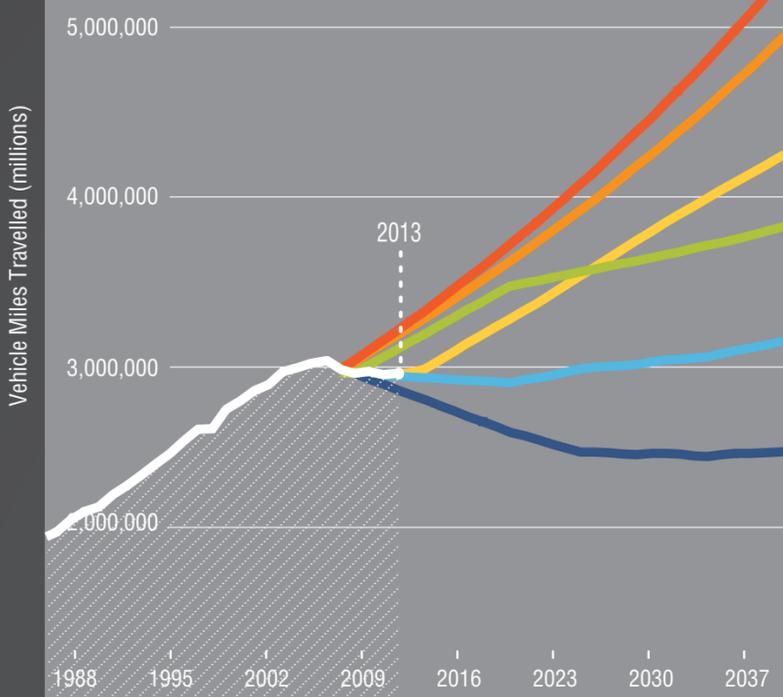
# MILLENNIALS ARE DRIVING LESS THAN PREVIOUS GENERATIONS

After a 60 year boom, driving is on the decline in the U.S. and no likely scenario shows it returning to previous levels of growth.

So why are our leaders relying on outdated assumptions to shape our transportation policies?

## THE FUTURE OF DRIVING

### SCENARIOS OF FUTURE VEHICLE MILES TRAVELED (VMT)



### GOVERNMENT SEES: A CAR-DEPENDENT FUTURE

The U.S. government's official forecasts envision an increase of 44% to 67% in miles driven by 2040—a return to steady increases in annual driving.

- “Conditions & Performance,” US Dept. of Transportation 2010
- “Paying Our Way,” Ntl. Surface Transportation Infrastructure Financing Comm. 2009
- “Annual Energy Outlook 2013,” U.S. Energy Information Administration
- Actual vehicle miles traveled

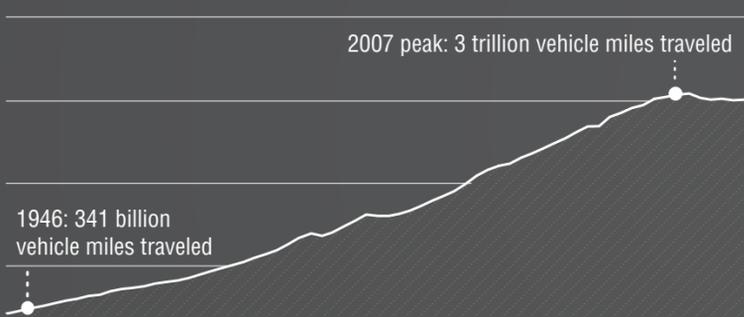


### RECENT TRENDS SUGGEST: A NEW DIRECTION

Using the latest data, we developed three possible scenarios for the future of driving. Americans are **already driving less**, and will likely continue to drive less than was predicted just a few years ago.

- BACK TO THE FUTURE SCENARIO:** the recent decline in driving is just a blip that will revert to peak levels and grow with population.
- ENDURING SHIFT SCENARIO:** the recent decline in driving represents a real change and today's habits will continue into the future.
- ONGOING DECLINE SCENARIO:** the recent decline in driving is the beginning of a deeper change in transportation patterns.

## THE DRIVING BOOM



While our scenarios represent three very different futures, all three would put future driving well below recent government forecasts.

## FORCES BEHIND THE DRIVING BOOM: 1946-2004

- Low gas prices made driving inexpensive enough for almost anyone.
- The explosion of suburbia brought rapid increases in long commutes.
- Women newly entered the labor force and became commuters.
- The Baby Boom led to a surge of people of peak driving age from the 1980s through the mid-2000s.

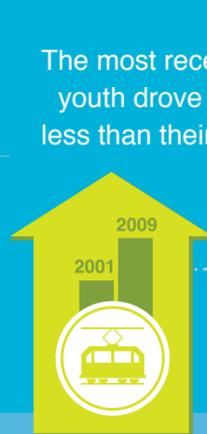
## WHY THE DRIVING BOOM IS OVER

- The Baby Boomers are retiring, bringing an end to their commuting days.
- Millennials are demonstrating new habits and a preference for a walkable lifestyle.
- Rising gas prices have made driving more expensive.
- While the decline began before the recession, the economy has contributed to reduced driving.
- The internet and mobile technologies have made driving less necessary and possibly less attractive compared to alternatives.

## MILLENNIALS CHANGE THE LANDSCAPE

As the Baby Boomers retire, the future of driving will depend on the Millennials. So far, the Millennials are driving significantly less than previous generations.

The most recent data shows that youth drove almost one-quarter less than their counterparts eight years earlier.



At the same time, their number of miles traveled per capita on public transit rose 40%.



Millennials are twice as likely as older Americans to want to live in urban, walkable neighborhoods.

Millennials have embraced new technologies that reduce the need for driving, including online shopping, connecting socially online, and using apps for public transit schedules and routes.

## A NEW DIRECTION FOR TRANSPORTATION

The decline in driving presents exciting opportunities for the future.

- Less Traffic:** As driving has declined, so has congestion and time spent stuck in traffic.
- Public Transit:** Moving funding away from highways enables new investment in public transit and routes for biking and walking.
- Oil Independence:** Gas use is at a ten-year low, and foreign oil imports are at their lowest level since 1995.
- Clean Air:** A reduction in gas use means less smog and less global warming pollution.