

The background of the slide features two flags waving. On the left is the United States flag, and on the right is the German flag. The text is overlaid on this background.

THE US AND GERMANY

Moving In The Same Direction?

Roy Kienitz

June 2012



The World's Concept Of The American Dream



The German Version?



**But when everyone lives this way
it takes up a lot of space**

Everything gets farther apart ... So we buy more cars





Because one car is no longer enough

We know where this leads



What began as a choice became a necessity



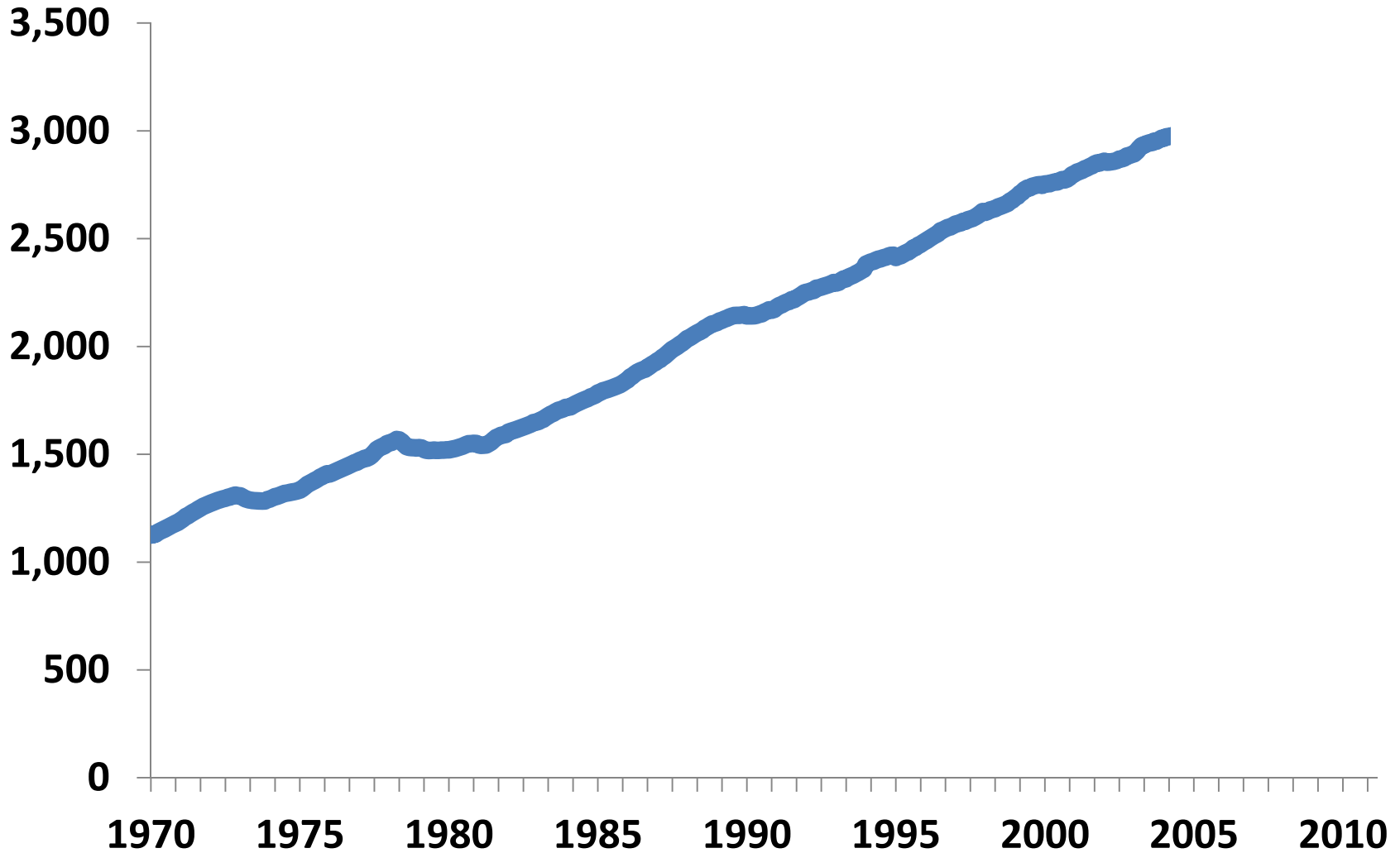
Europe Has A Different Image



But it wasn't always that way

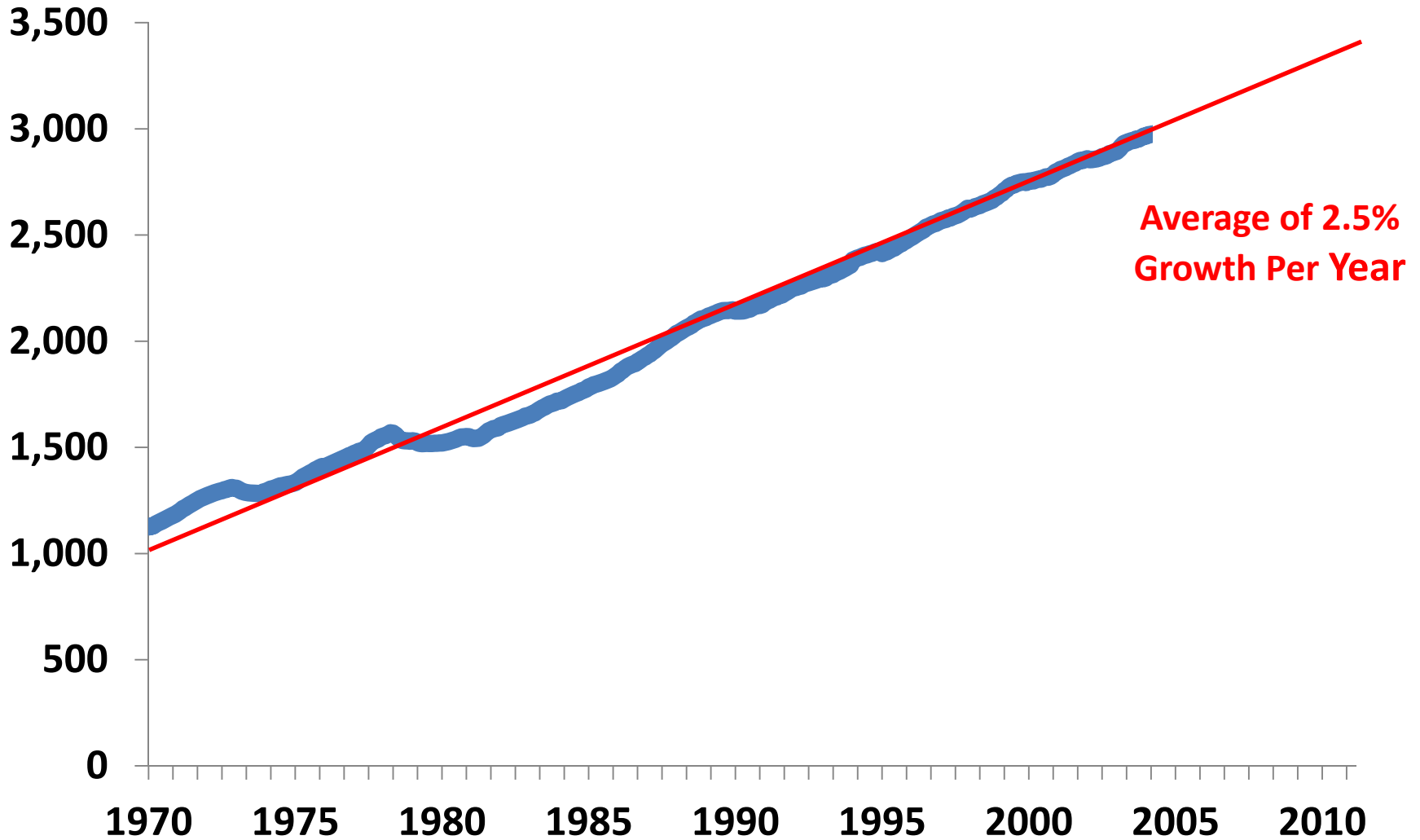
Driving In the United States, 1970 to 2004

(Billions of Miles Per Year)



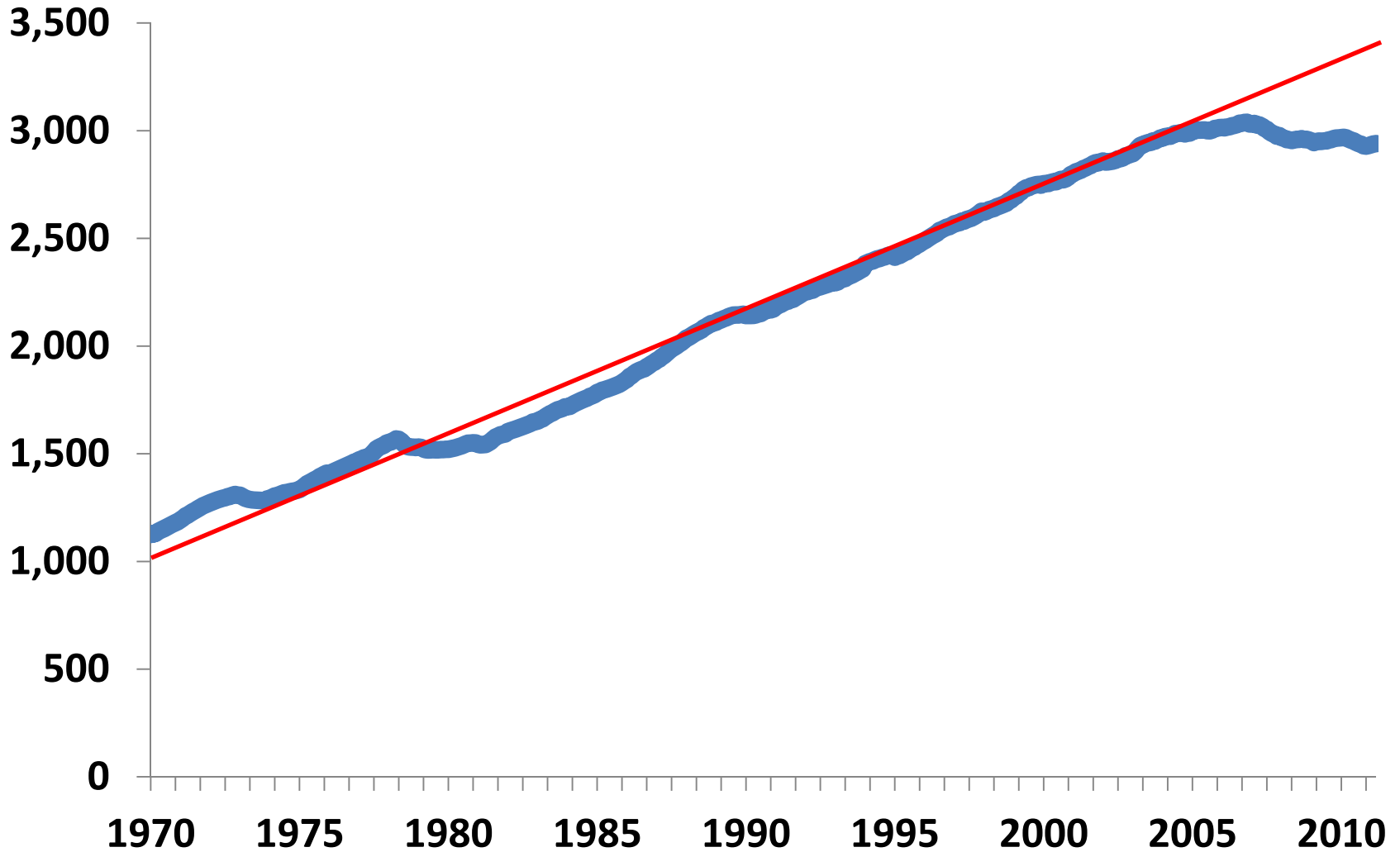
Driving In the United States, 1970 to 2004

(Billions of Miles Per Year)



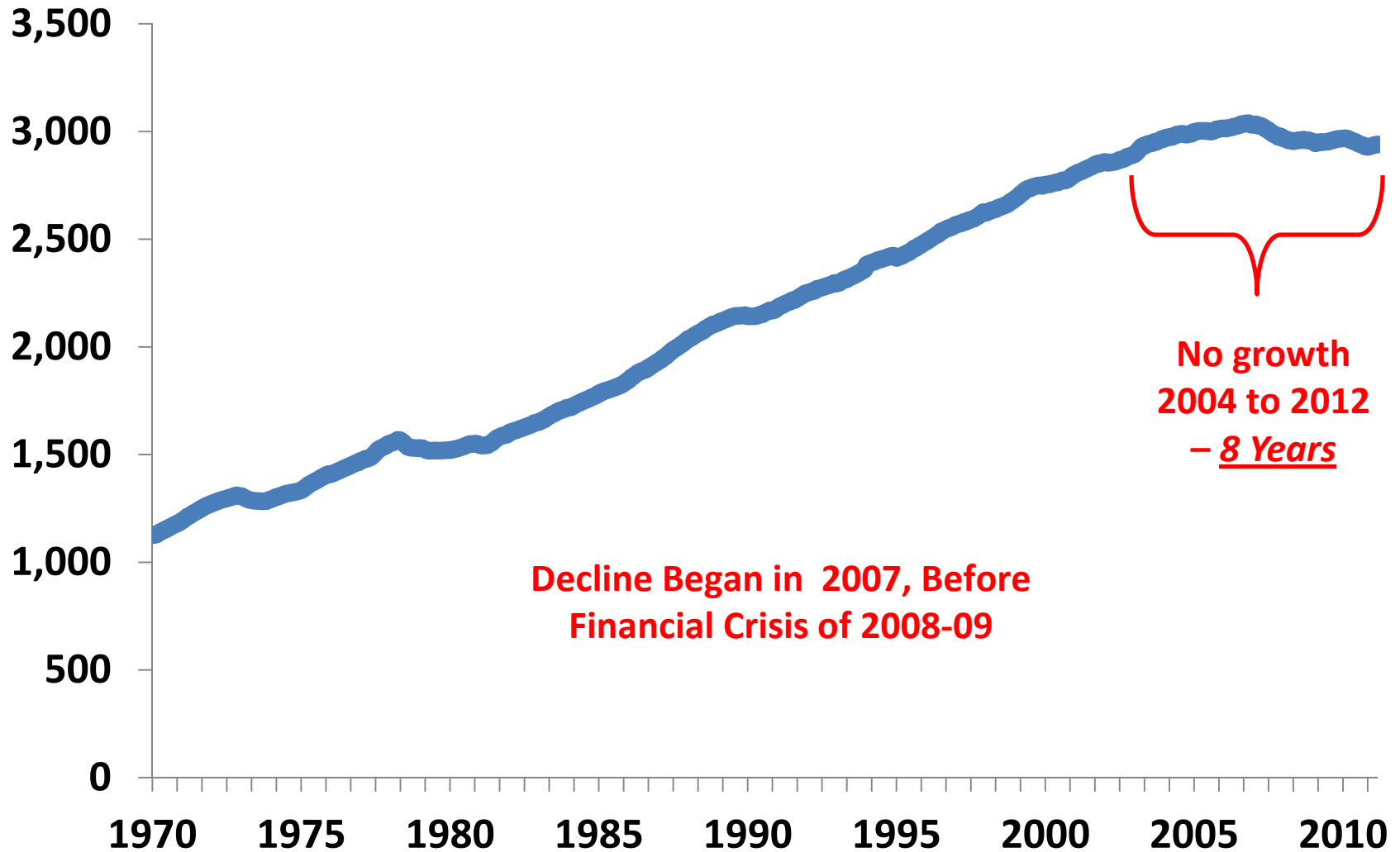
Driving In the United States, 1970 to 2012

(Billions of Miles Per Year)

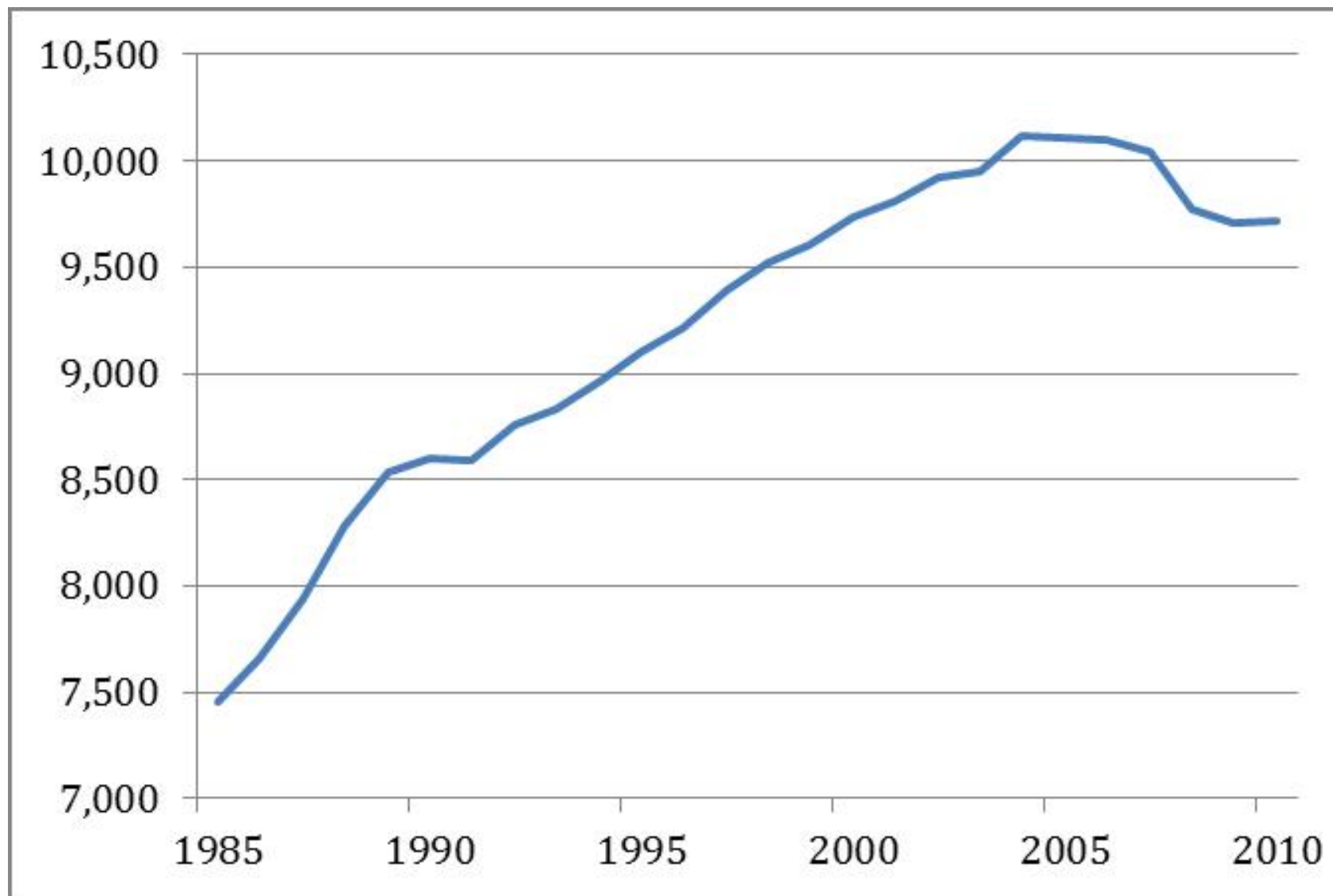


Driving In the United States, 1970 to 2012

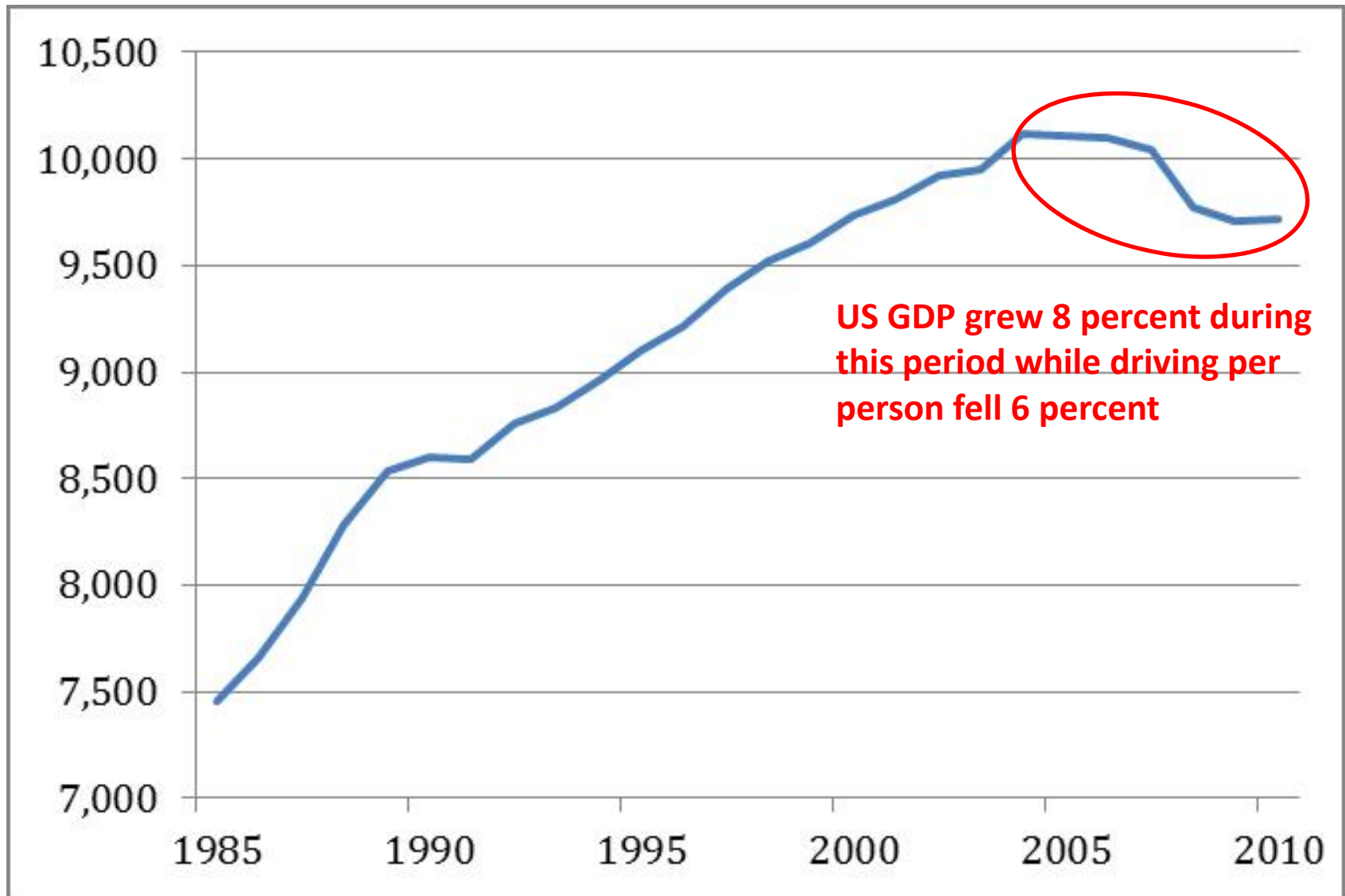
(Billions of Miles Per Year)



US Driving Per Person, 1985- 2011

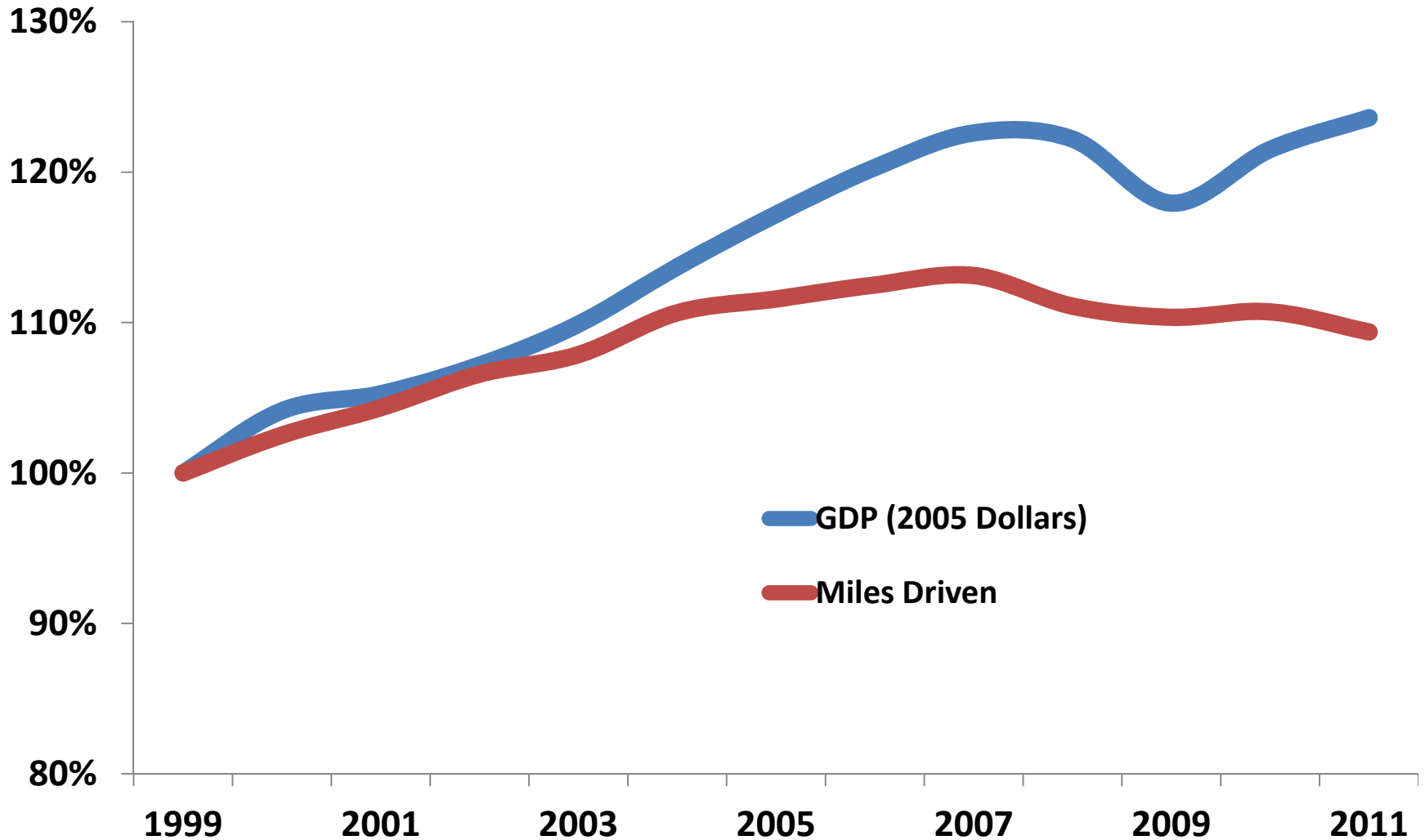


US Driving Per Person, 1985- 2011

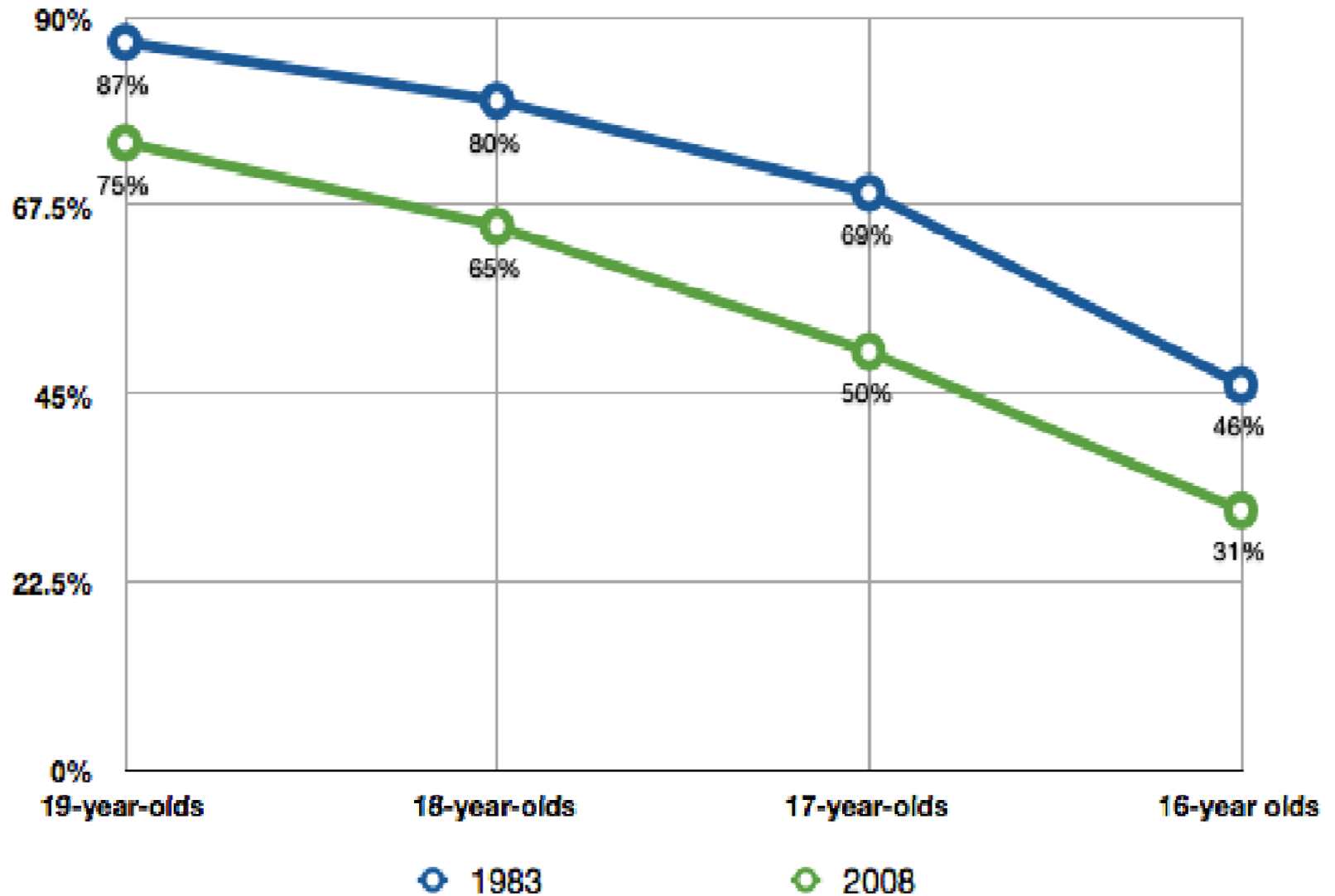


ECONOMIC GROWTH AND DRIVING, 1999 - 2011

(GDP in constant 2005 Dollars, VMT in miles driven, 1999 = 100)



Percentage of US teenagers with driver's license

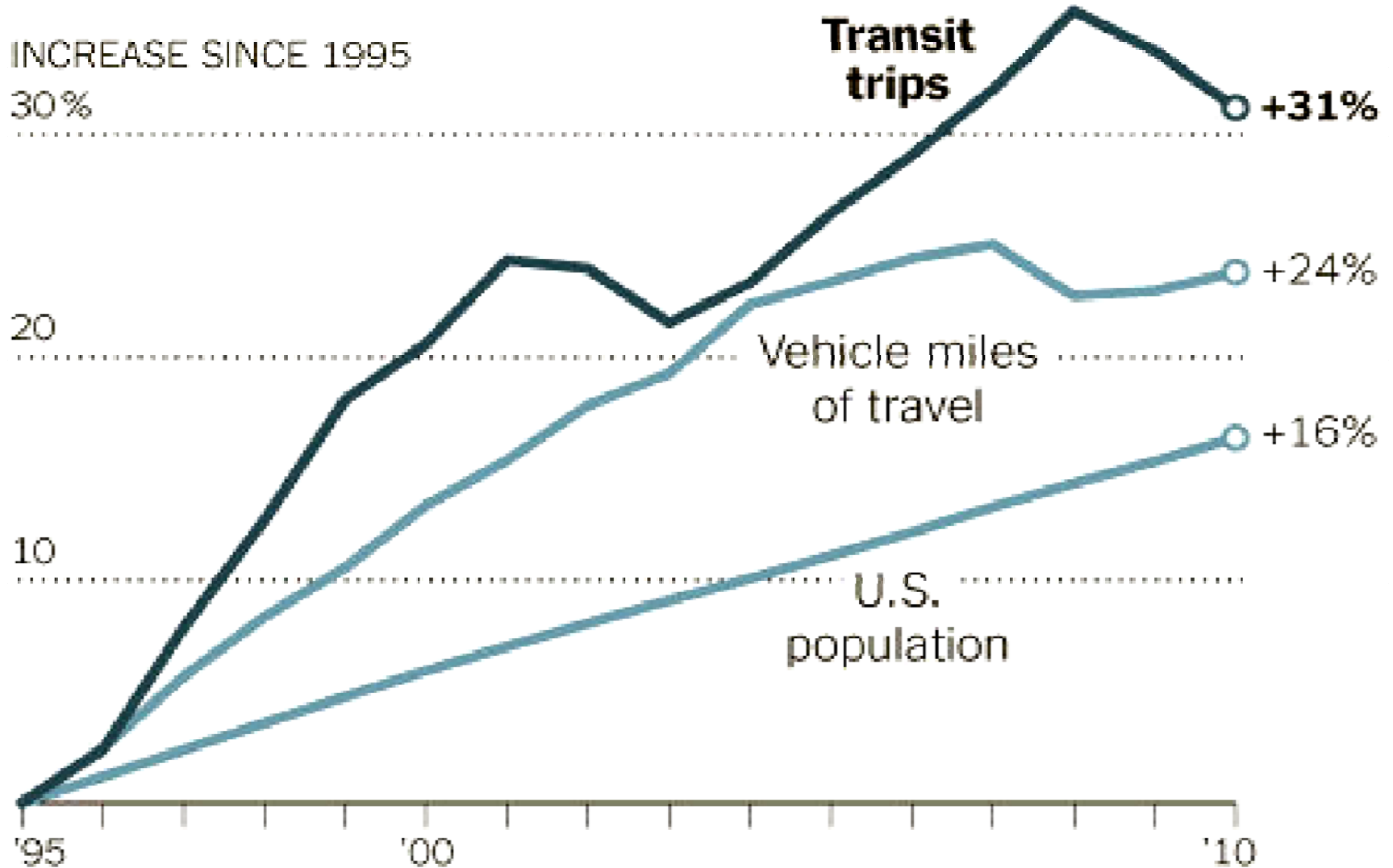




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Strong Growth of Mass Transit



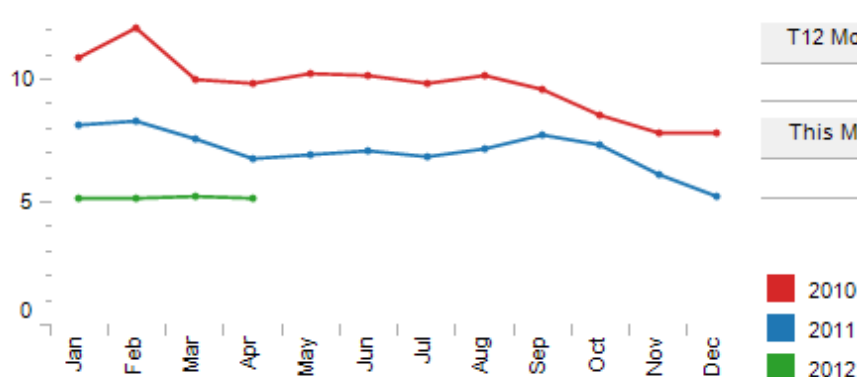


INRIX Index United States

Show Top

Trailing 12 months from

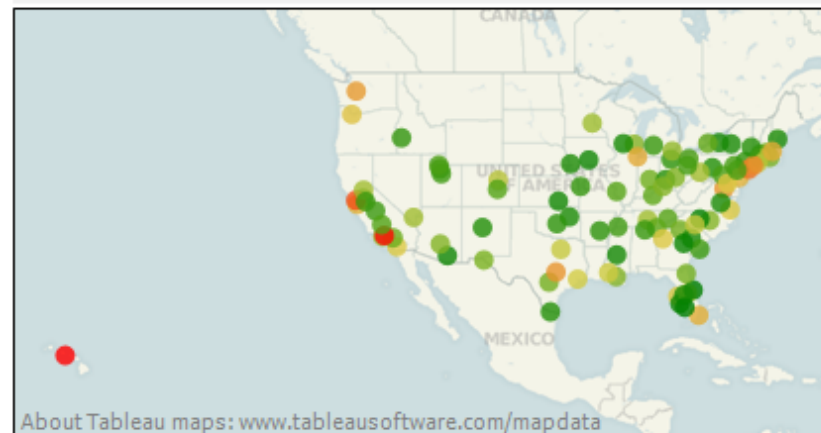
INRIX Index, United States: Monthly Trend



T12 Months	T12 Prior Year	% Growth
6.2	8.7	-28.5%
This Month	This Month LY	% Growth
5.1	6.7	-23.8%

Metro	Rank	T12 Months	This Month	This Month LY
Honolulu	1	24.0	21.3	27.4
Los Angeles	2	23.8	21.0	23.4
San Francisco	3	20.1	17.0	17.8
New York	4	18.1	15.4	18.4
Bridgeport	5	16.4	13.8	16.4
Austin	6	15.2	16.5	15.9
Washington D.C.	7	15.1	12.9	16.4
Seattle	8	14.9	11.9	13.4
Chicago	9	13.3	10.3	13.2
Boston	10	13.0	10.2	13.8
Miami	11	12.8	11.2	14.3

All Metros: Trailing 12 months from April, 2012



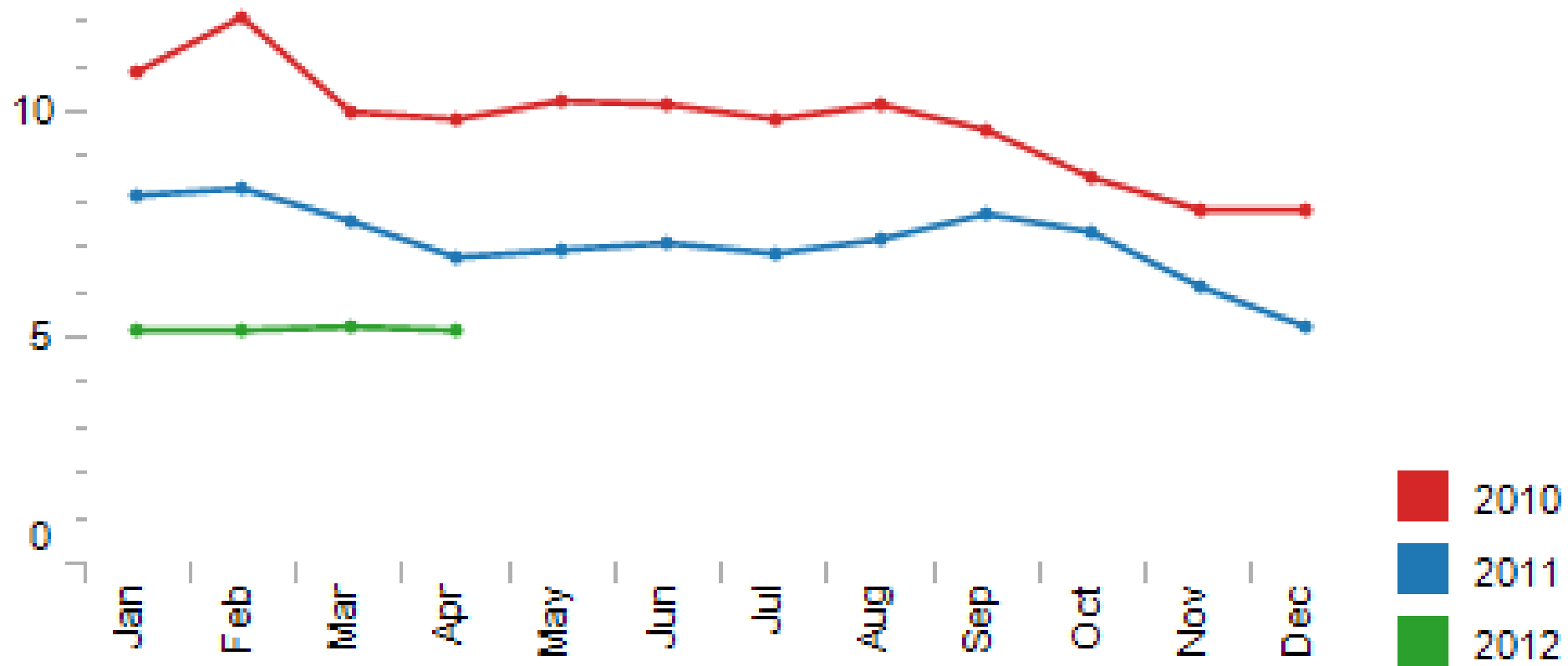
Biggest Movers: YTD vs. Last Year

Fort Myers	1	13%
El Paso	2	1%
San Jose	3	-2%
Austin	4	-3%
Houston	5	-3%
San Francisco	6	-9%
Seattle	7	-11%
San Diego	8	-11%
Baton Rouge	9	-12%
Los Angeles	10	-13%
Tampa	11	-16%
New Orleans	12	-16%

Biggest Movers: Current Month vs. Last Year

Minneapolis	1	46.0%
Melbourne	2	12.3%
San Jose	3	11.2%
New Orleans	4	8.1%
Austin	5	3.6%
Houston	6	3.4%
El Paso	7	1.3%
San Diego	8	0.9%
San Francisco	9	-4.3%
Albany	10	-4.3%
Denver	11	-6.1%
Columbia	12	-6.1%

INRIX Index, United States: Monthly Trend



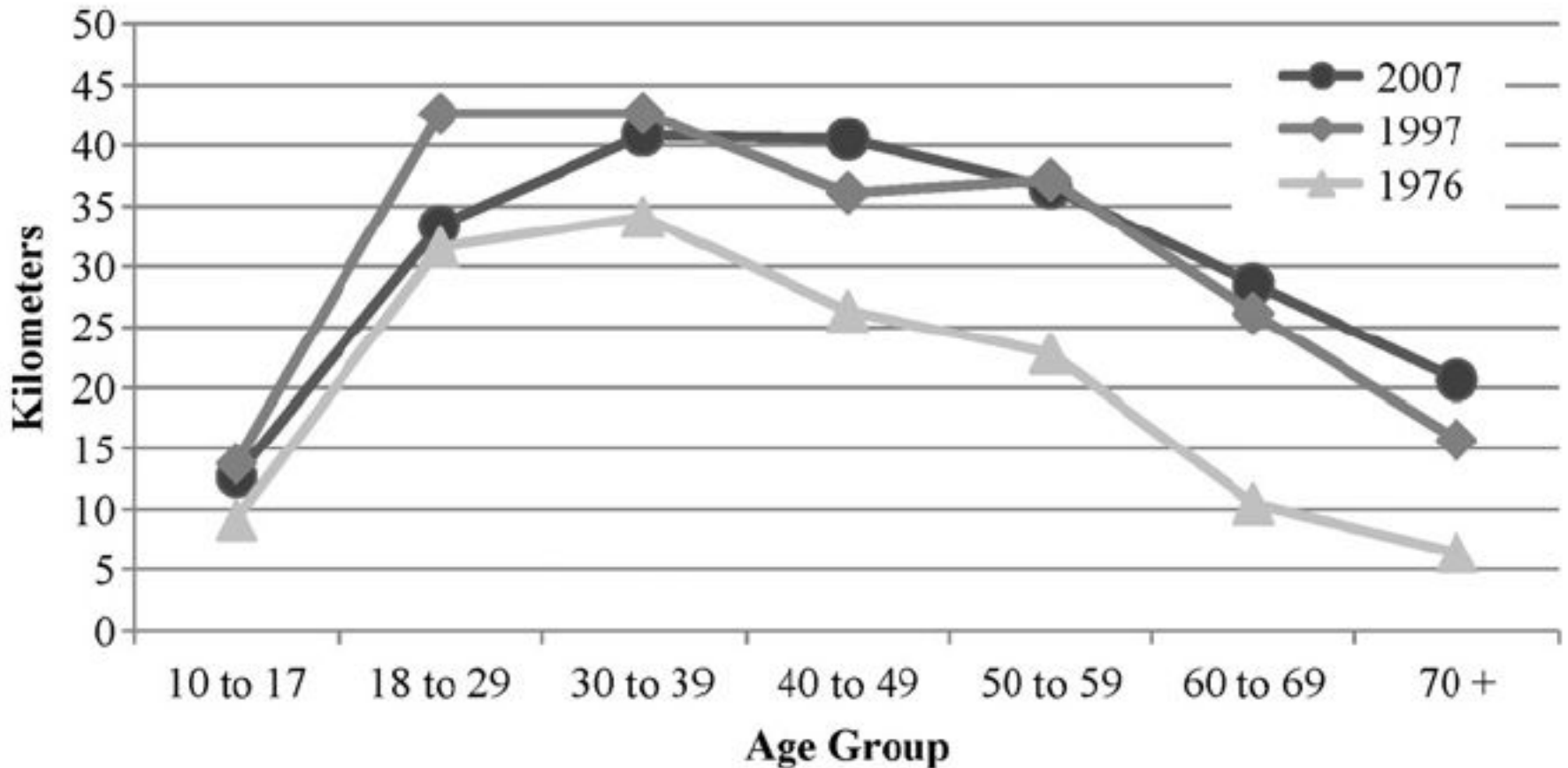
Young Americans Aren't the Only Ones Driving Much Less Than Their Parents

ERIC JAFFE JUN 04, 2012 14 COMMENTS

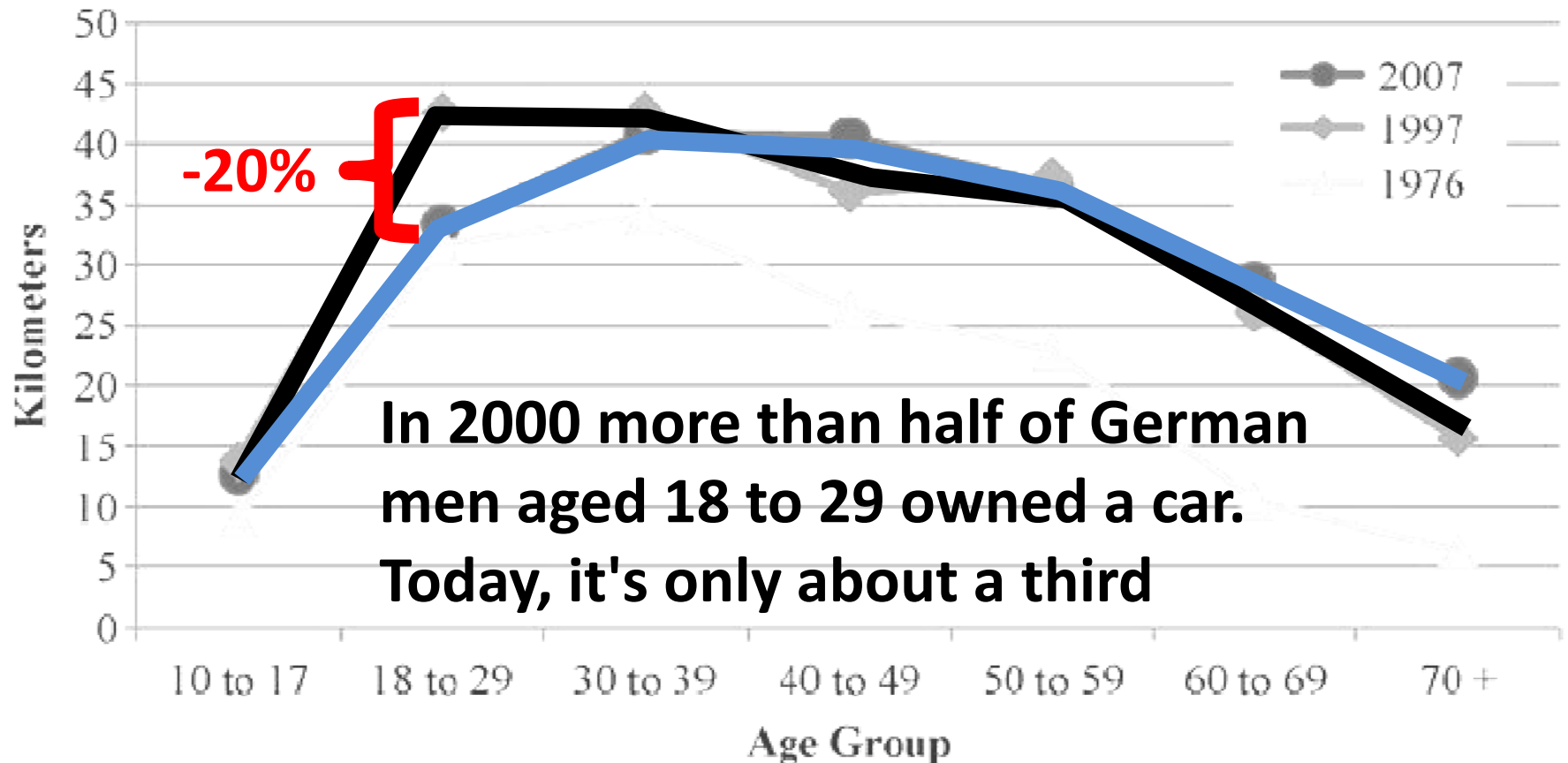


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Driving Behavior In Germany By Age Group (Km per day)

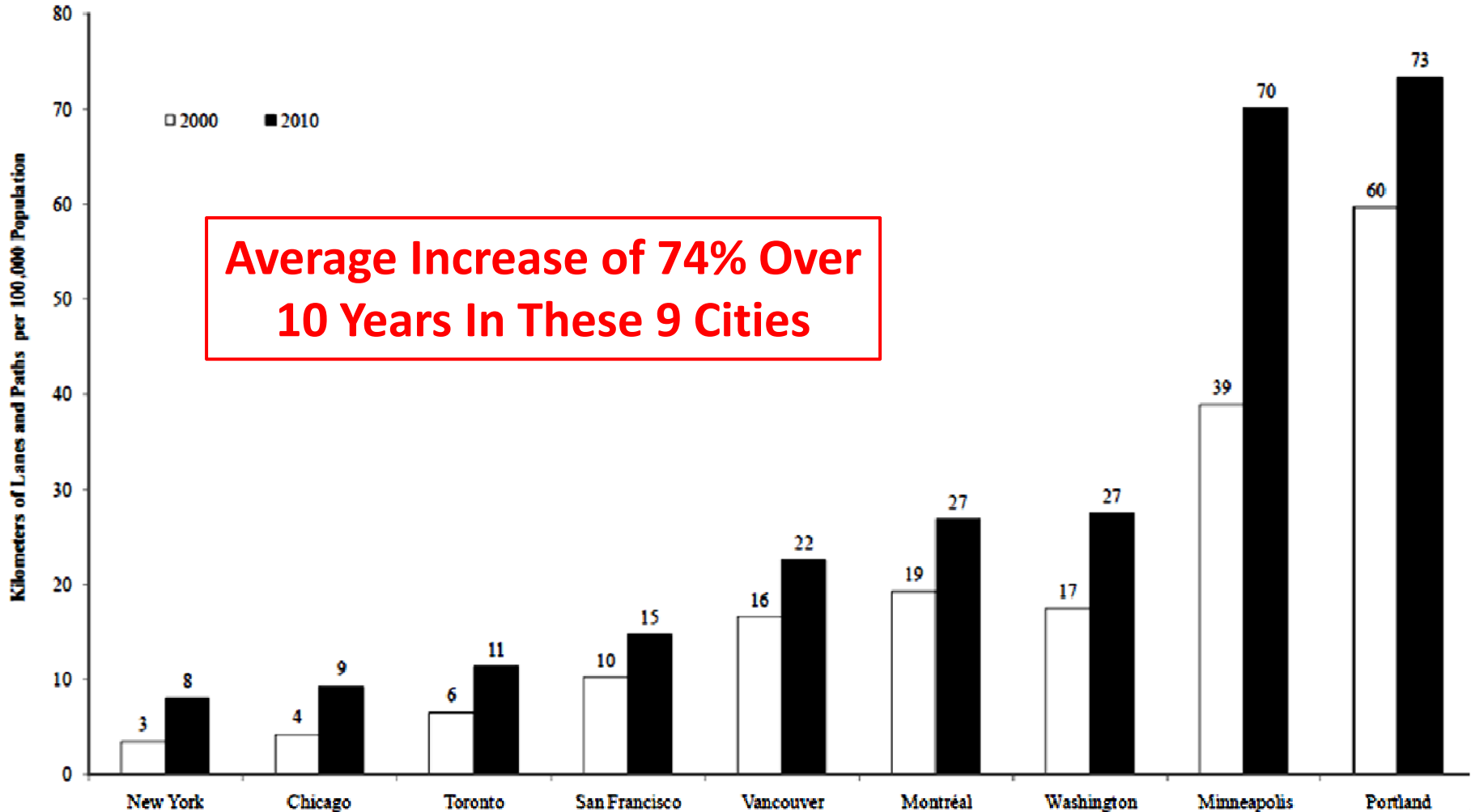


Driving Behavior In Germany By Age Group (Km per day)



More Bicycle Lanes Are Being Built

*Miles of Protected Bikeway Per 100,000 Residents,
9 U.S. & Canadian Cities, 2000 and 2010*





New models are emerging ...

stadtmobil

carsharing



200,000 members, 5600 cars



What's Next?

The image features two flags waving against a grey background. On the left is the United States flag, showing its characteristic stars and stripes. On the right is the German flag, with its horizontal stripes of black, red, and gold. The text 'THANK YOU' is centered over the flags in a white, bold, sans-serif font.

THANK YOU