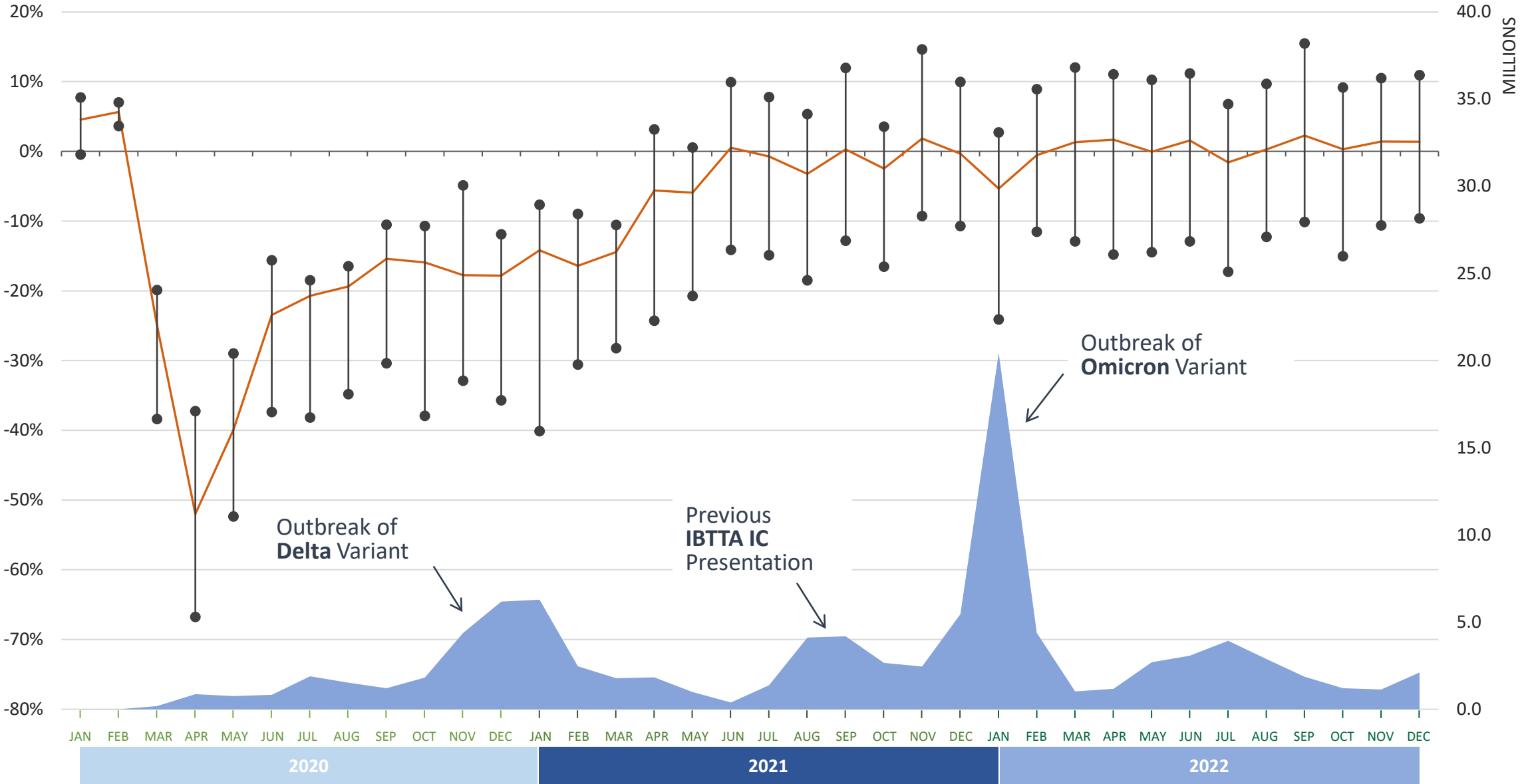


Global Outlook

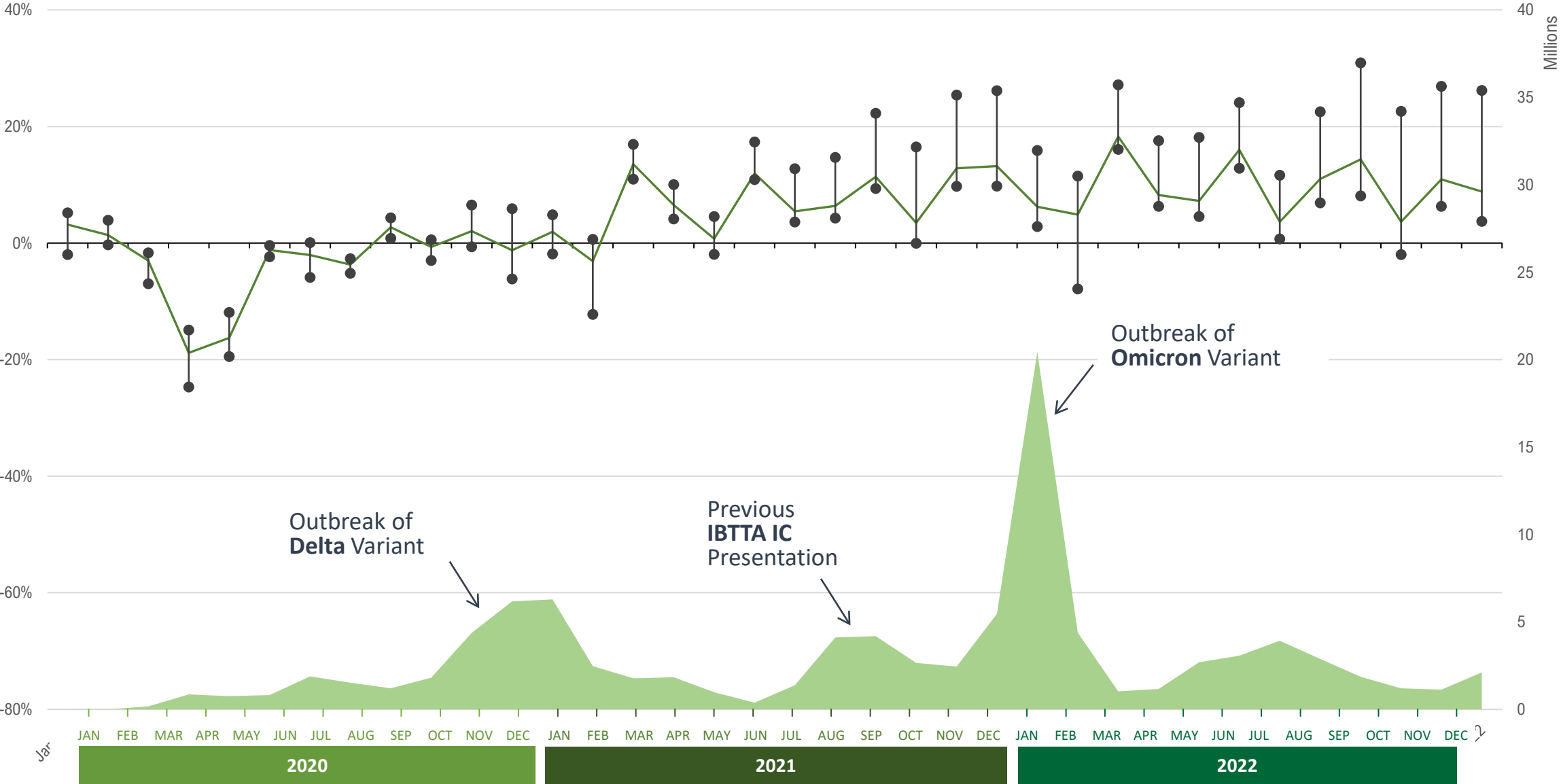
Forecasting Post-Pandemic
Toll Revenues



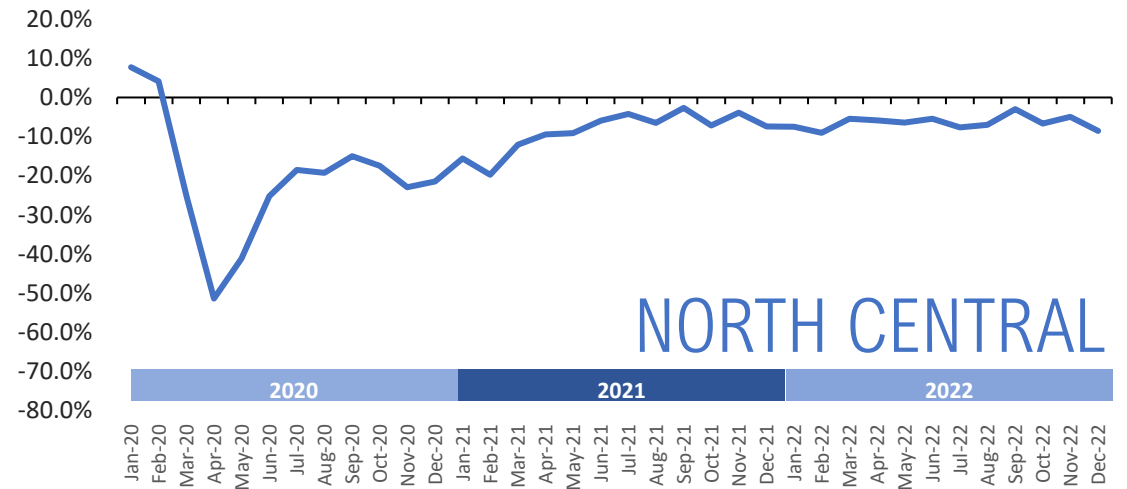
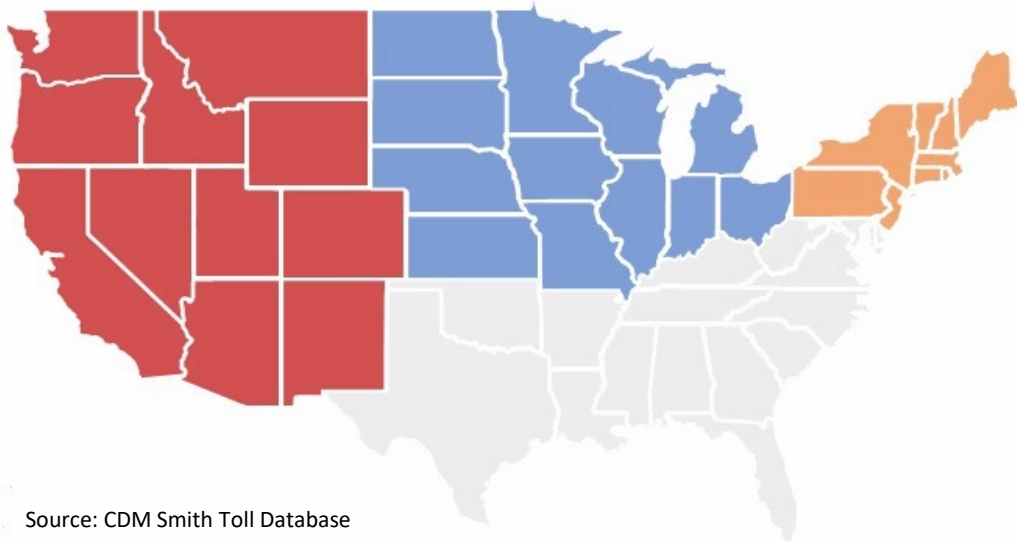
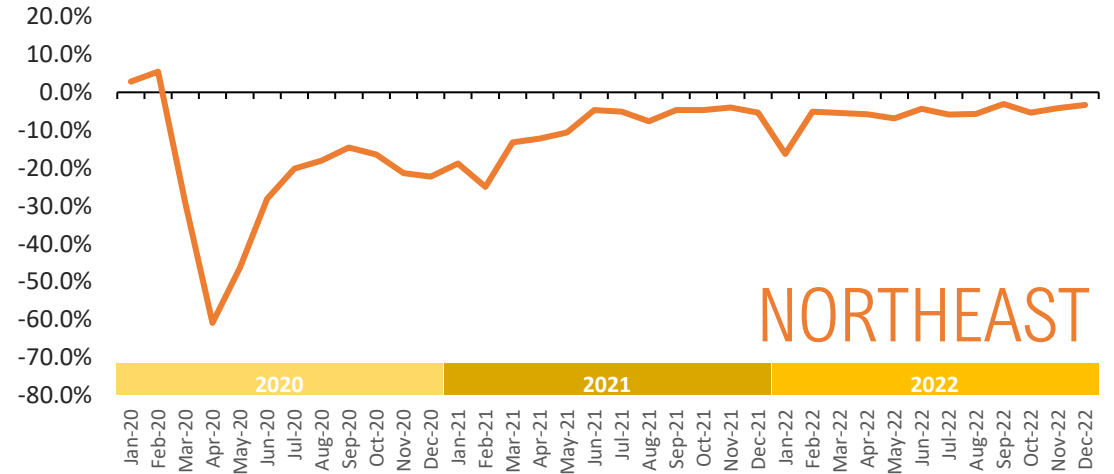
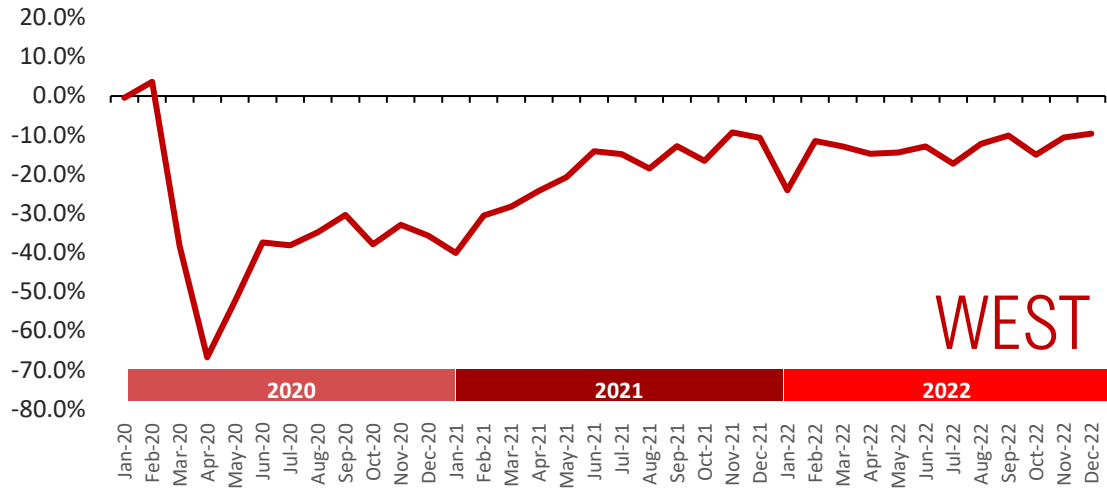
U.S. NATIONAL TOLL TRANSACTION PERFORMANCE



NATIONAL COMMERCIAL TOLL TRANSACTION PERFORMANCE

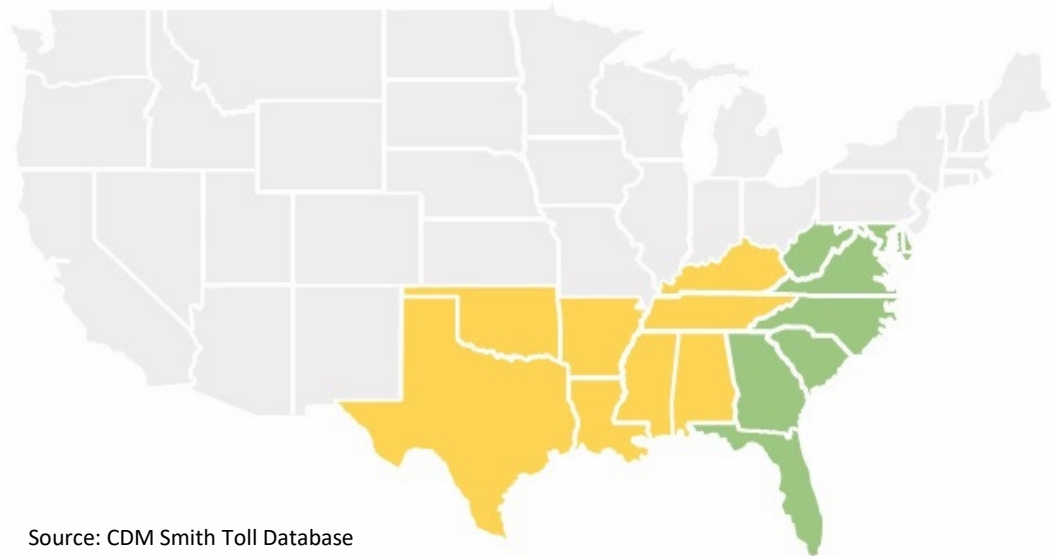
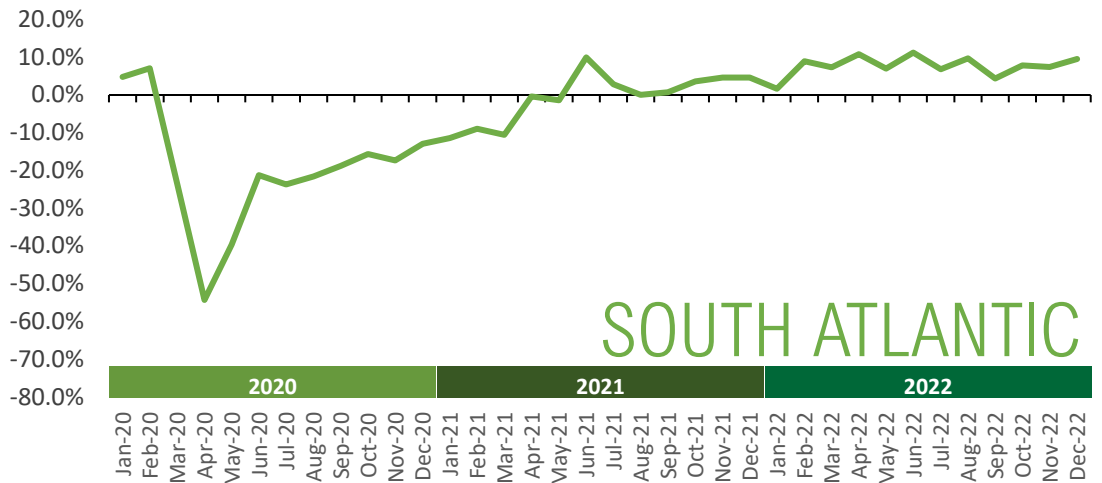
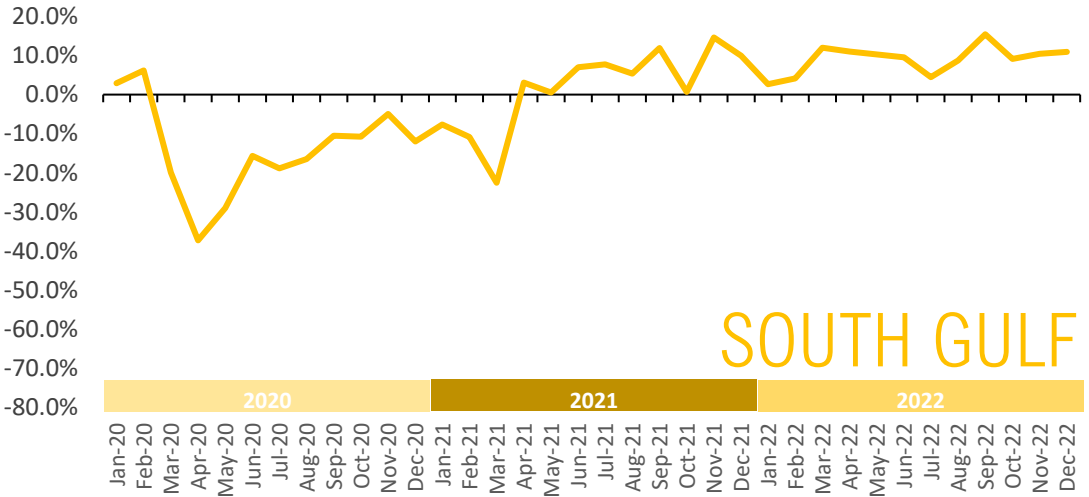


PERFORMANCE BY REGION



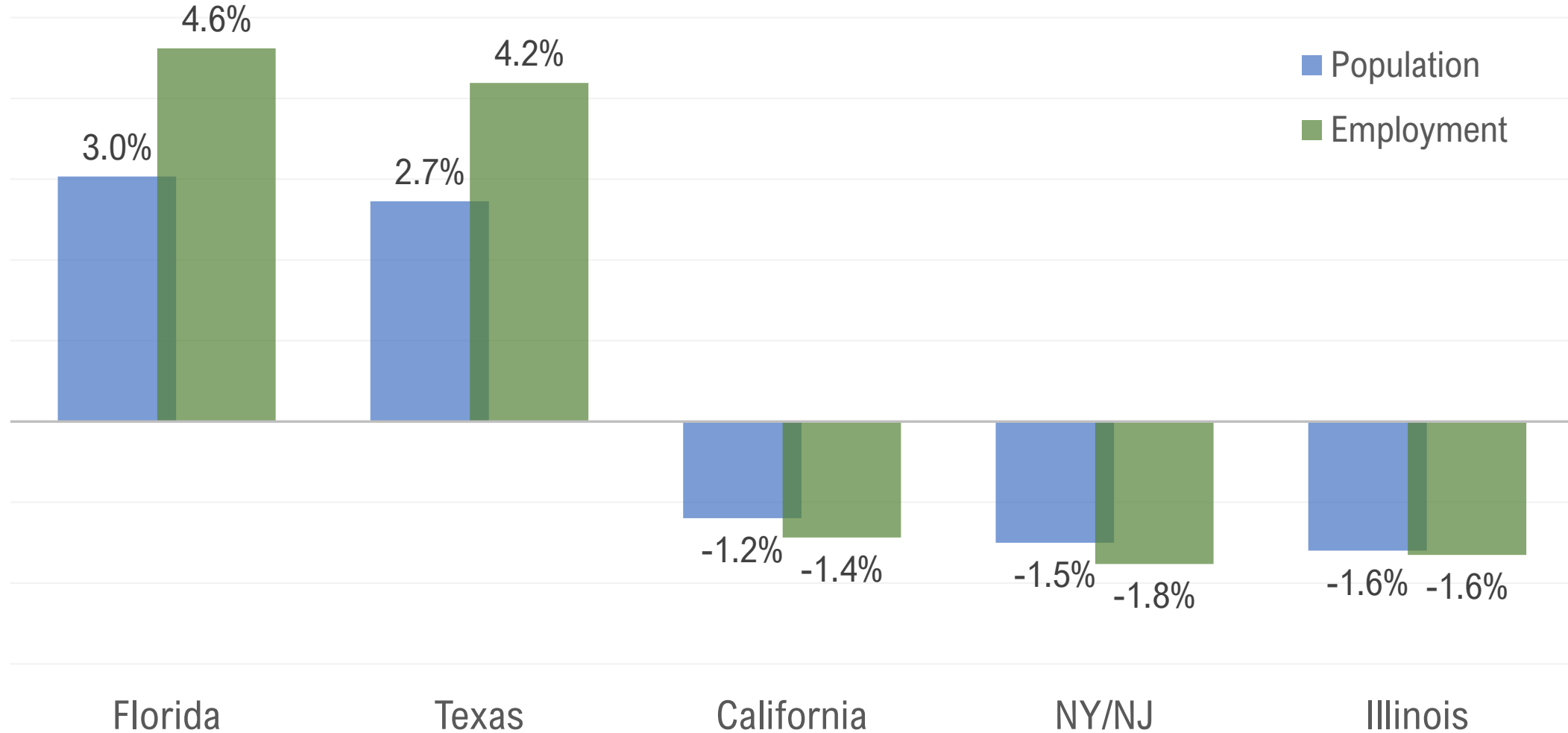
Source: CDM Smith Toll Database

PERFORMANCE BY REGION



Source: CDM Smith Toll Database

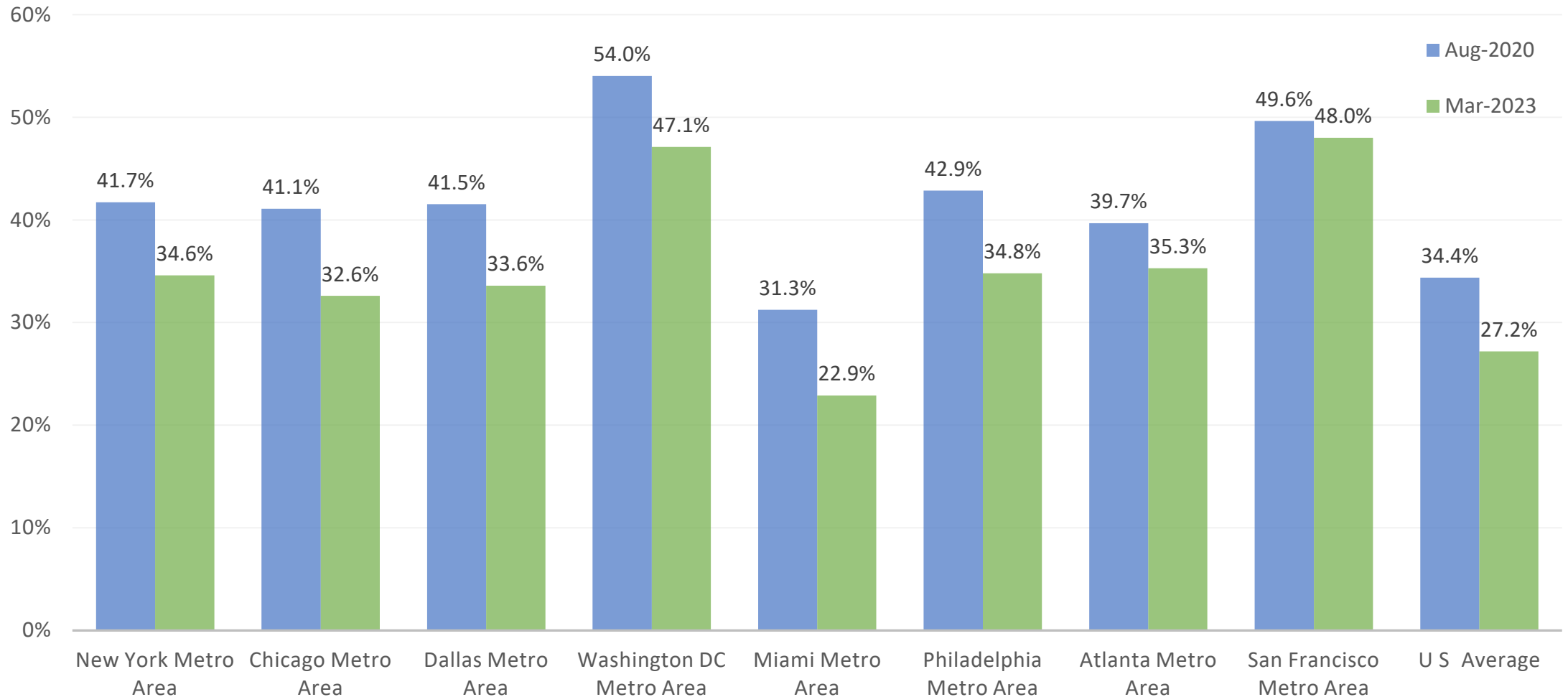
POPULATION & EMPLOYMENT GROWTH



Source: U.S. Census, Bureau of Labor Statistics

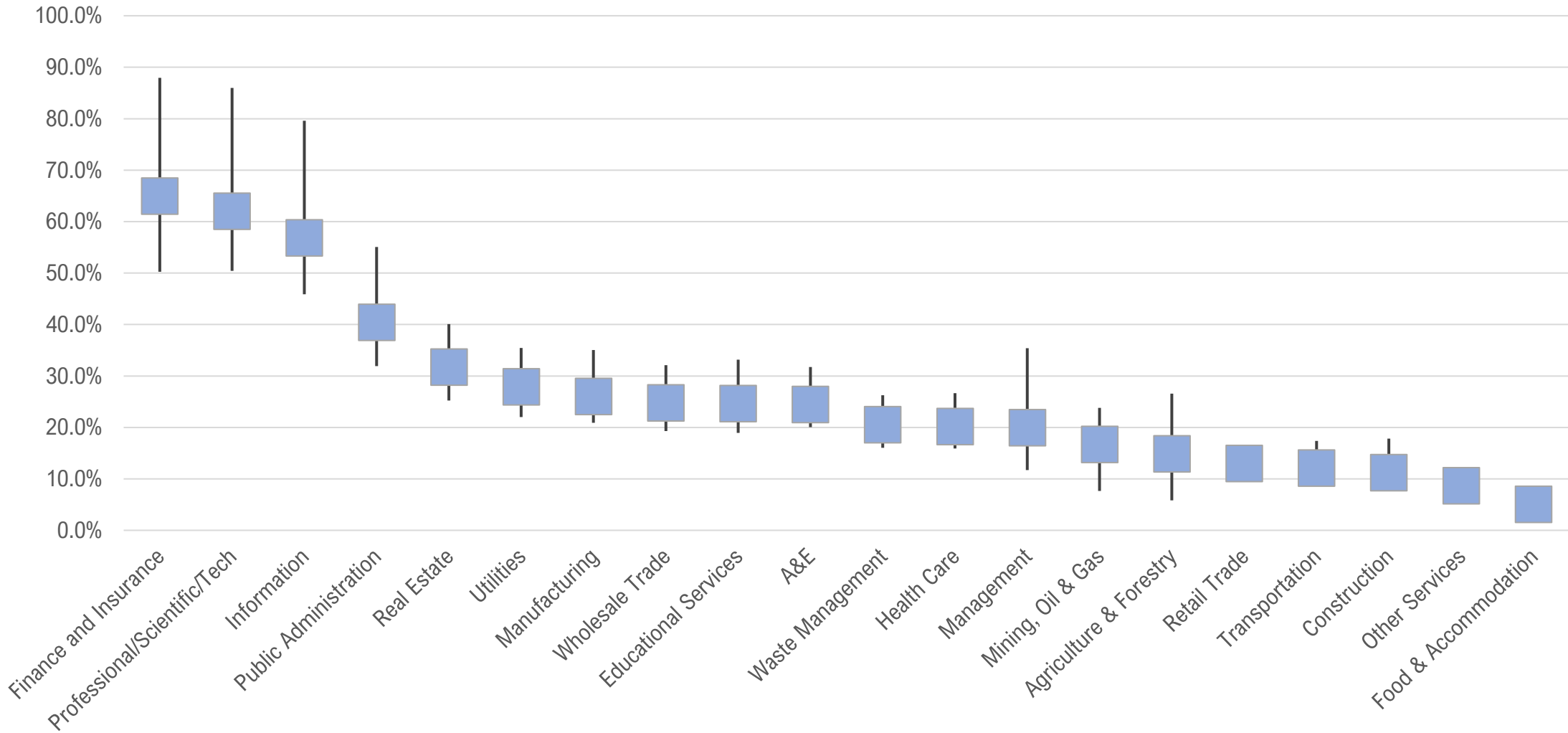
WORK FROM HOME IS “STICKY”

Reporting At Least One Day Worked Remotely



Source: U.S. Census Household Pulse Survey, Week 13 and Week 53

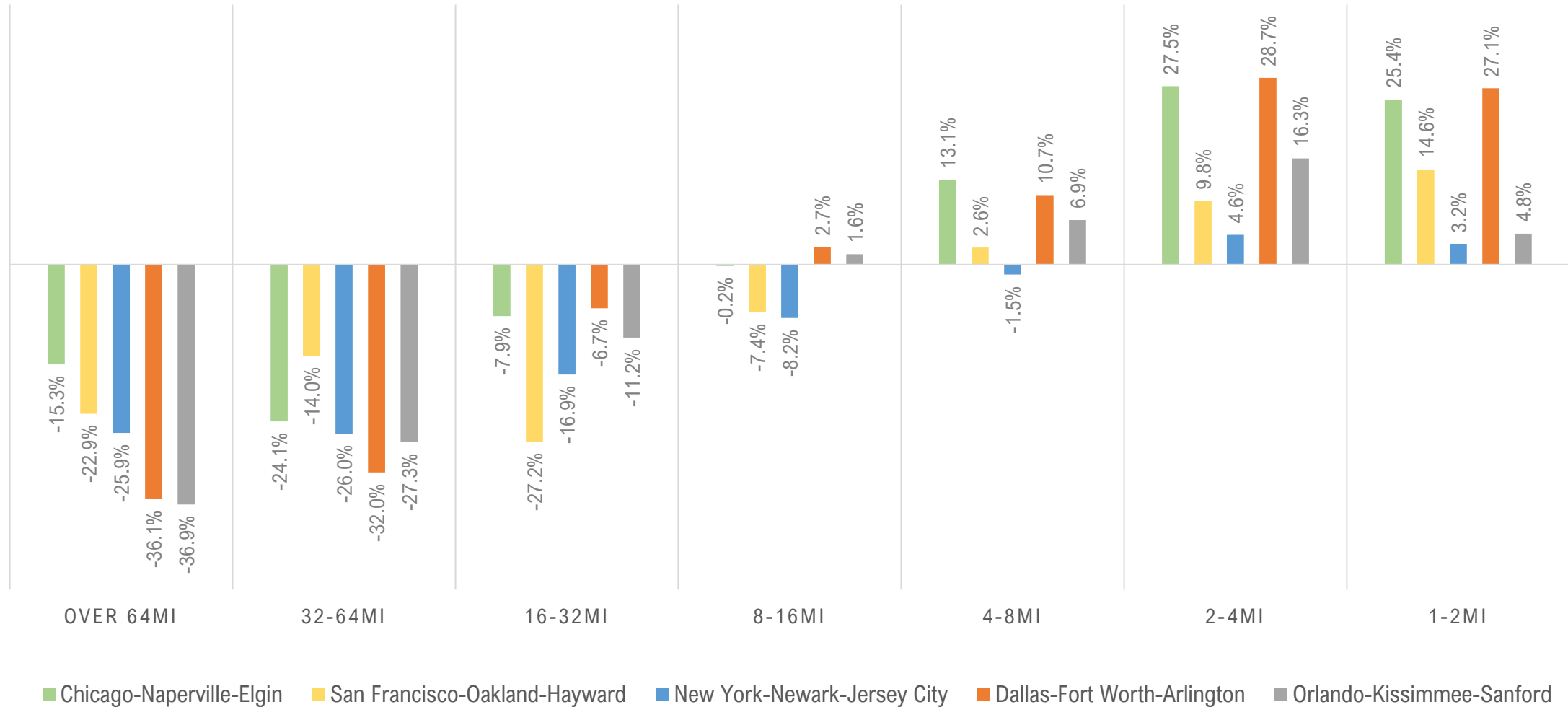
PROPENSITY TO TELECOMMUTE BY INDUSTRY



Source: Replica Places data retrieved Apr-2023, Cities over 500k

TRIP LENGTH DISTRIBUTION

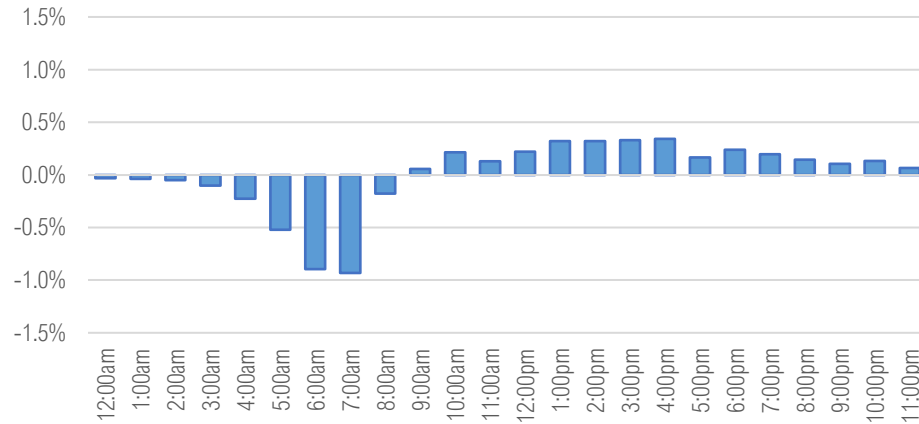
Trending Towards Shorter Trips



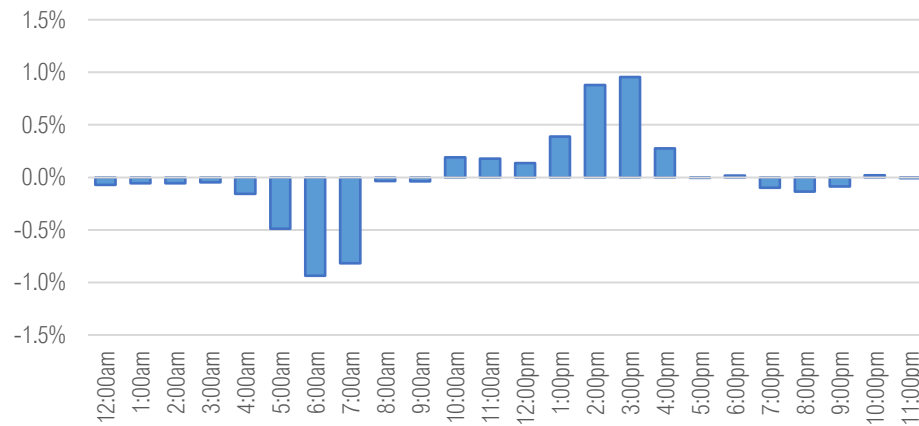
Source: Replica Places data retrieved Apr-2023

TIME OF DAY TRIP DISTRIBUTION

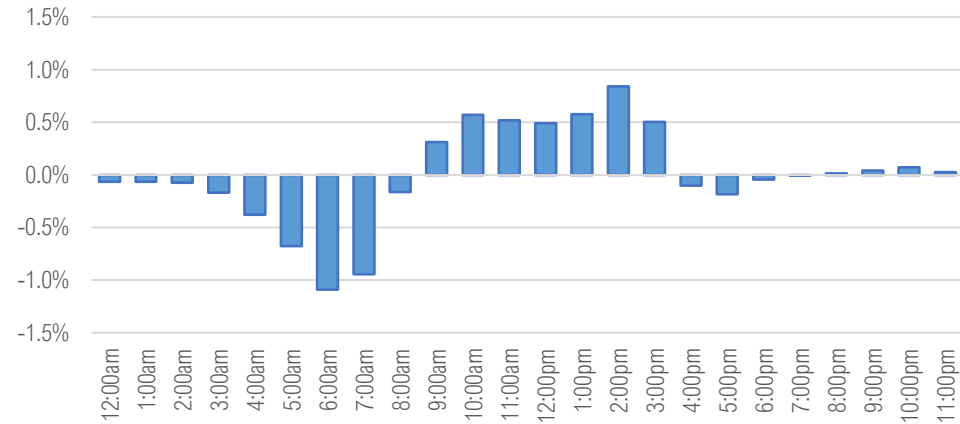
Change In Daily Share for Combined Statistical Area



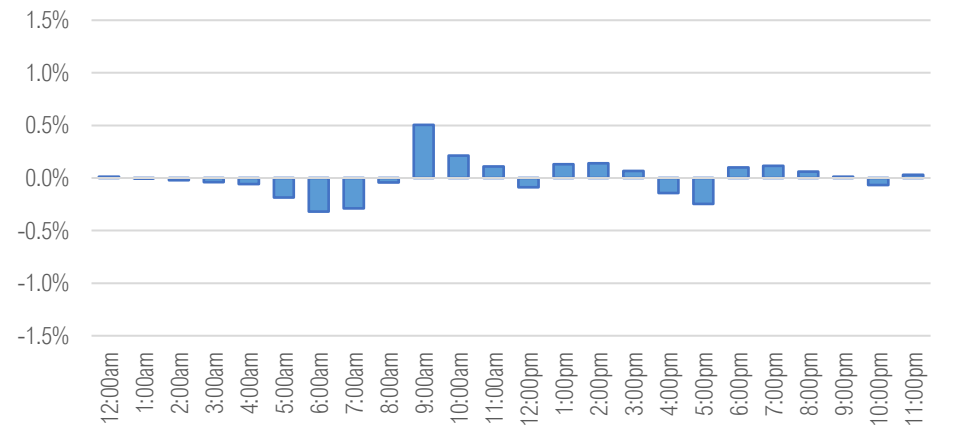
DALLAS-FORT WORTH-ARLINGTON



SAN FRANCISCO-OAKLAND-HAYWARD



CHICAGO-NAPERVILLE-ELGIN

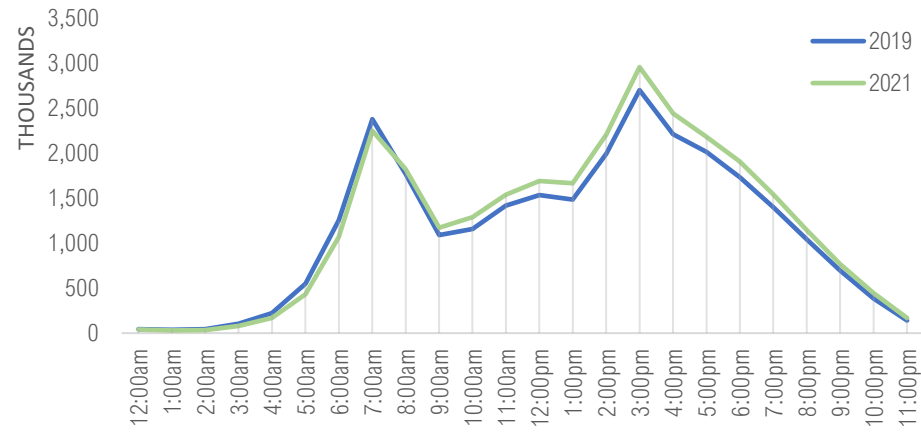


ORLANDO-KISSIMMEE-SANFORD

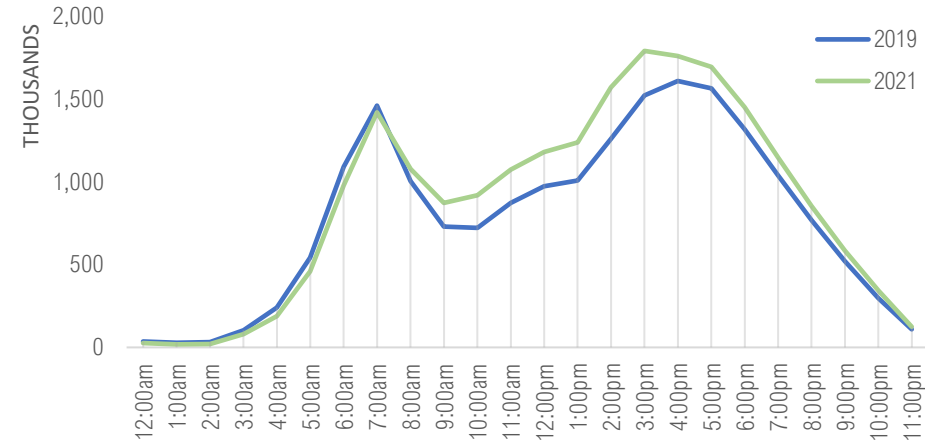
Source: Replica Places data retrieved Apr-2023

TIME OF DAY TRIP DISTRIBUTION

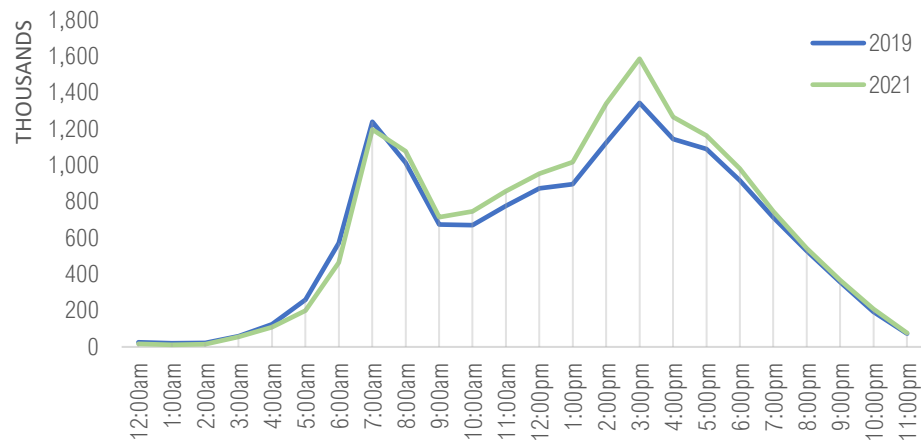
Total Trips for Combined Statistical Area



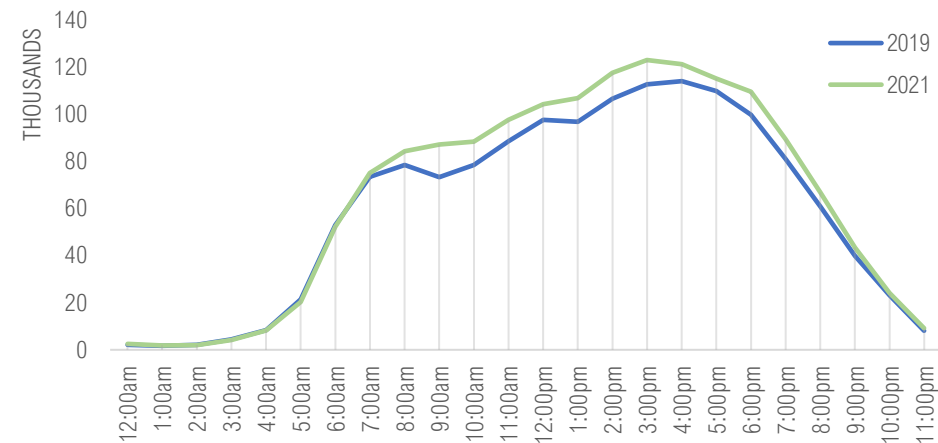
DALLAS-FORT WORTH-ARLINGTON



CHICAGO-NAPERVILLE-ELGIN



SAN FRANCISCO-OAKLAND-HAYWARD



ORLANDO-KISSIMMEE-SANFORD

KEY TAKEAWAYS

Managing Change

What has changed?

- Lost/slow growth
- Shorter trips and peak spreading
- Commercial traffic buffering revenues
- Work from home is here to stay... for now

What should we do?

- Re-benchmark and forecast
- Be aware of exposure to risk of economic slowdown/recession
- Look at your data
- Watch for changes land use

UNDERSTANDING CHANGE

Data sources used today

- American Time Use Survey (US Census)
- Household Pulse Survey (US Census)
- U.S. Bureau of Labor Statistics
- Google COVID-19 Mobility Reports
- WFH Research
- Replica
- CDM Smith Databases

