

**FINAL DRAFT (July 18, 2003)**

**ORLANDO-ORANGE COUNTY  
EXPRESSWAY AUTHORITY:**

**BI-ANNUAL SURVEY  
OF EXPRESSWAY  
USERS AND NON-USERS**

**JULY, 2003**

# SURVEY OF EXPRESSWAY USERS AND NON-USERS (2003)

## HIGHLIGHTS

### Purpose

- This study examines the opinions of: (1) residential users of the Expressway who have E-PASS (called “E-PASS users”); (2) residential users of the Expressway who do not have E-PASS (“cash users”); (3) residents who do not use the Expressway (“Non-customers”); and (4) business users who have E-PASS (“business users”). E-PASS is a device that electronically registers toll charges as vehicles with such devices pass through toll lanes. This survey compares results with the previous surveys conducted in 1997, 1999 and 2001.
- The survey of E-PASS users and business users are based on a random sample of registered users. The survey of cash-users is based on a random sample of Orange County residents, and the survey of non-customers is based on a random sample of Orange County and Seminole County residents. Comparison with the 1997 cash user and non-customer surveys should be made with caution as the 1997 surveys narrowly targeted respondents along the toll road corridors.

### Usage

- Half of all E-PASS users, 50.7%, make *less than* five trips per week on the toll roads. Such infrequent use has steadily increased in recent years (47.3% in 2001, 39.4% in 1999 and 27.1% in 1997).
- More cash users are infrequent users of the toll roads. In 2003, 82.4% made less than five trips per week, compared with 74.5% in 2001, 74.0% in 1999 and 52.7% in 1997. On average, cash users make 3.8 trips per week, compared to 6.7 trips among E-PASS users.
- E-PASS users and cash users describe a broad range of purposes for which they use the toll road system. Most use it for commuting to work, on the job travel, errands and

special events. The percentage of E-PASS users who use the toll road for commuting to work remains constant (35.2% in 2003). However, as a percentage of all uses, more E-PASS users people now use the Expressway system for *errands* (23.3%) rather than for commuting 17.8%.

- Among business users, 64.5% use the toll roads more than 26 times per week, and 90.7% agree or strongly agree that their companies depend on the toll roads for getting around Central Florida.
- 29.6% of E-PASS users and 37.3% of cash users state that they avoided using the toll roads in the last three months (resp. 32.8% and 41.5% in 2001). The most common reason given for avoiding the toll roads is to save money (respectively, 48.2% and 43.3%). Other reasons include too much traffic (resp. 15.3% and 19.3%) and roads not going where users need them to go (resp. 10.6% and 7.7%).
- 74.8% of non-customers stated that there was nothing the Expressway could do to encourage them to use the Expressway. Of these, about half said that they have no need for them, that these roads don't go where they go, or that they don't drive enough. 15.0% suggested making the tolls cheaper or eliminating them might encourage them to use the Expressway.

## Roadway

- Respondents overwhelmingly believe that the toll roads are faster than other roads. 95.3% of E-PASS users agree or strongly agree with this statement, as do 92.8% of cash users, and 97.1% of business users. This is consistent with previous years. Although respondents overwhelmingly state the toll roads are faster than other roads, the percentage of E-PASS users who *strongly* agree with that the toll roads are faster has dropped from 55.1% in 1997 to 31.8% in 2003, as has the percentage of cash users (20.4% in 2003 versus 45.9% in 1997).
- Respondents state that the roadways are well maintained. 95.6% of E-PASS users agree or strongly agree that the roads are well maintained, as do 93.3% of cash users and 92.9% of business users. Also, a majority of respondents state that the toll roads do not need *more* landscaping.
- Satisfaction with signage continues to be high. 88.4% of E-PASS users agree or strongly agree that the toll roads have adequate signage, as do 91.7% of cash users and 95.8% of business users.
- 90.5% of cash users agree or strongly agree that toll booth employees are courteous.

## Safety

- Respondents feel that the Expressway is safe to use. 72.2% of E-PASS users agree or strongly agree that the road is safer to use, as do 69.4% of cash users and 79.4% of business users. These results are consistent with past years.
- 68.0% of E-PASS users and 60.3% of cash users agree that enough police officers patrol the Expressway (similar to 2001). 87.2% of E-PASS users and 81.7% of cash users state that they know that the Florida Highway Patrol (FHP) patrols the Expressway. 76.8% of E-PASS users and 78.1% of cash users feel that such patrols make the Expressway safer.
- 51.5% of E-PASS users are familiar with the Roadranger program, and 68.0% state having Roadrangers makes travel on the Expressway safer. Among cash users, 42.3% are familiar with the Roadranger program, and 53.4% state that Roadrangers make travel on the Expressway safer. Although very few E-PASS users and cash users have ever been helped on the Expressway (resp. 6.7% and 7.9%), more than half report having seen motorists helped by a Roadranger (resp. 68.0% and 53.4%).
- 46.3% of E-PASS users, 34.2% of cash users and 44.7% of business users state that people travel at safe speeds in the E-PASS lanes. 58.4% of business users state that large trucks should be required to go through the E-PASS lanes at slower speeds than smaller vehicles.

## **E-PASS**

- 97.7% of E-PASS users are satisfied with their E-PASS, as are 96.5% of business users. These responses are quite similar to previous years.
- 67.7% of E-PASS users are aware that they need to replace their batteries from time to time in their E-PASS device, and 38.4% are that they can do so for free.
- 63.8% of E-PASS users are aware that they receive a discount for frequent Expressway use, but only 14.7% state that such a discount causes them to use the Expressway more often. 33.30% of cash users are aware of a discount for frequent use among those with an E-PASS device.
- As in past years, the E-PASS service center employees draw high marks for their customer service. 45.6% of E-PASS users report having ever called the service center (similar to past years), and of these, 80.0% report getting through in a timely manner (up from 73.0% in 2001), 88.1% had their questions answered to their satisfaction (up from 77.5% in 2001) and 90.3% state that the person on the phone was courteous (up from 74.2% in 2001). Overall, 90.3% of such callers are satisfied or very satisfied with the service that they received (up from 80.9% in 2001). Among business users, 56.0% state that customer service centers should be located in other areas.

- Among cash users, 95.2% have heard of the E-PASS toll collection device prior to the survey. The most common way for cash users to first learn about E-PASS is by word of mouth (33.9%) and television ads (32.9%). Having first heard about E-PASS through television ads greatly increased since 2001 (19.4%), which is attributed to increased use of television advertising in recent years.
- The most frequent reason for not getting E-PASS among cash users is that respondents do not use the toll roads that much (62.7%, up from 53.3% in 2001 and 48.5% in 1999). 62.0% of cash users state that they would get the E-PASS transponder if it was free. 61.5% state that tolls would have to be increased by at least 25 cents for them to switch to E-PASS, though 16.2% would switch if the differential was 5 cents.
- Among E-PASS users, 57.1% would like to get free coupons for discounts at selected retail, restaurant, electronic and other stores, though only 6.9% would want to receive them if they cost \$1 extra. Among cash users, 36.3% are interested in getting E-PASS if it included monthly coupons for discounts at selected retail, restaurant, electronic and other stores.

## Communications

- Among E-PASS users, 75.4% have seen or heard advertising for the Expressway or E-PASS, as have 74.6% of cash users, 69.1% of non-customers and 87.2% of business users. In 2003, all groups reported that the most common way of having heard such advertising was through television (respectively, 55.4%, 61.6%, 77.9% and 50.3%). Radio (resp. 15.0%, 12.1%, 7.8% and 20.4%) and billboards (resp. 19.6%, 14.3%, 6.6% and 15.9%) are the second and third most common methods.
- Among E-PASS users, 71.4% report having received the Expressway Navigator and, among these, 75.9% read it, 73.1% find the information useful, and 61.7% state that their overall opinion of the Expressway Navigator is “excellent” or “very good.”
- 81.5% of E-PASS users receive e-mail, compared with 60.1% of cash users. Among E-PASS users who receive e-mail, 67.1% prefer to receive the Expressway Navigator by mail, 20.2% prefer to receive it by e-mail, and 40.8% state that they would read the Expressway navigator if they received it by e-mail.
- 43.0% cash users would like to receive information about the toll roads, and 36.1% would read it if sent by e-mail.
- 31.5% of E-PASS users have visited the Expressway’s website (up from 11.7% in 1999), compared with 10.0% of cash users (up from 2.0% in 1999), 5.0% of non-customers (7.8% in 2001), and 48.2% of business users (4.5% in 1999). Among business users, 65.9% state that it is important or very important that they can access

their E-PASS statement through the web, 62.4% that they can check their account balance on the web, 68.8% that they can update their account information on the web, 52.5% that they can view their account activity as it occurs, and 34.7% that they can monitor traffic conditions in real time.

- Only 36.7% of E-PASS users and 25.9% of cash users (up from 14.8% in 2001) correctly identify that the Expressway Authority owns and operates these toll roads (up from, respectively, 29.8% and 14.8% in 2001).

## Policy

- Among E-PASS users, 38.4% prefer to fund new road projects by tolls, 22.9% by taxes and 38.6% don't know. Less support for tolls exists now than in 2001, when 51.0% of E-PASS users preferred tolls, 29.8% preferred taxes and 19.3% didn't know. It is possible that the present debate surrounding the present Orange County transportation tax referendum currently affects opinions on this matter. Among cash users, the current respective percentages are 31.6%, 58.0% and 10.5% (in 2001: 31.3%, 61.8% and 7.0%), among non-customers 15.7%, 47.6% and 36.7% (in 2001: 26.8%, 44.5% and 28.8%), and among business users 51.8%, 15.6% and 32.6% (in 2001: 70.8%, 26.2% and 3.8%).
- Among E-PASS users, 28.8% are willing to pay a higher toll to avoid congestions and delays, 64.3% are not willing, and 6.9% don't know. Among cash users, these respective percentages are 31.6%, 58.0% and 10.5%.
- Strong support exists for ticketing toll violators. Among E-PASS users, 84.5% support ticketing toll violators, as do 84.1% of cash users and 87.2% of business users. This level of support is similar to that of previous years, but growing among cash users (81.8% in 2001, 72.7% in 1999 and 65.3% in 1997).
- Only 15.8% of E-PASS users are interested in receiving, as part of their E-PASS, a separate electronic card that could be used for selected purchases (such as parking or retail) that would be automatically billed to their E-PASS account.

## Summary of Major Trends:

- Residential users of the Expressway are increasingly infrequent users. Now, 50.7% of E-PASS users and 84.2% of cash users make *less than* five (5) trips weekly. About one-third of E-PASS users use the Expressway for commuting, but as a percentage of all uses, more E-PASS users now use the toll roads for running errands. The Expressway has clearly become a multi-purpose highway system.

- E-PASS users, cash users and business users have increased their use of Expressway's website. Visiting the website among E-PASS users increased to 31.5% in 2003, up from 29.3% in 2001 and 11.7% in 1999. Among business users, visiting the website increased to 48.2% in 2003, from 20.8% in 2001 and 4.5% in 1999.
- The primary reason for cash users to not get E-PASS, that they do not use the roads enough, increased to 62.7% in 2003 (up from 53.3% in 2001 and 48.5% in 1999).
- The household income gap between E-PASS and cash users is substantial and has grown. In 2003, 76.0% of households with E-PASS and 44.7% of households with cash users had incomes over \$45,000. Thus, 31.3% more households with incomes over \$45,000 had E-PASS. In 2001, the difference was 25.9%, and in 1999, 20.2%.
- Respondents are increasingly seen advertising for the Expressway Authority of E-PASS. 75.4% of E-PASS users have now seen advertising (59.0% in 2001 and 63.0% in 1999), 74.6% of cash users (62.5% in 2001 and 52.9% in 1999), 69.8% of non-customers (74.0% in 2001 and 58.0% in 1999), and 87.2% of business users (63.5% in 2001 and 59.1% in 1999).
- Increasingly, respondents who saw advertising did so on television. 55.4% of E-PASS users who have seen or heard advertising did so on television (18.7% in 2001, and 33.2% in 1999), as did 77.9% of non-customers (28.2% in 2001 and 55.7% in 1999). Among cash users, the percentage of those who first heard of E-PASS through television increased to 32.9% in 2003, from 19.4% in 2001.
- Among E-PASS users, support for tolls dropped to 38.4% (from 51.0% in 2001), and those who don't know increased to 38.6% (from 19.3% in 2001). Among cash users, support for tolls dropped to 39.9% (from 55.5% in 2001), and those who don't know increased to 42.8% (from 28.3%). Among business users support dropped to 51.8% (from 70.8%), and those who don't know increased to 32.6% from 3.8%. Support for tolls among non-customers remained unchanged.

## METHODS

The purpose of this survey is to assess the opinions relating to the quality and safety of roads that make up the Expressway, satisfaction with E-PASS and E-PASS services, toll services, advertising and various other issues. This information is gathered from four study populations: (1) residential users of the Expressway who have E-PASS (so-called “E-PASS users”); (2) residential users of the Expressway who do not have E-PASS (“cash users”); (3) residents who do not use the Expressway (“non-customers”), and (4) business users who have E-PASS (“business users”). Most survey items address This research was conducted by Pecora & Pecora, Inc. of Winter Park, Florida, and Dr. Evan Berman. Interviewing was conducted by DataMarq, Inc. of St. Louis (MO).

This research project builds on earlier surveys conducted in 1997, 1999 and 2001, and allows for comparing many items. The above mentioned purposes are similar to those of these past surveys and, as before, phone interviews were used to collect data. In this study, E-PASS users were interviewed between April 29 and June 6, 2003, business users were interviewed between June 4 and June 16, 2003, and cash users and non-customers were interviewed between May 21 and June 20, 2003. Cash and non-customers were randomly selected from listed, residential (household) phone numbers. Cash users were randomly selected from household phone numbers in Orange County, whereas non-customers were randomly selected from household phone numbers in the geographic area defined by Orange County and Seminole County. E-PASS and business users were randomly selected from a list of current customers supplied by the Expressway Authority. As in the 2001 survey, business users were interviewed that have more than 25 full time employees and are E-PASS customers. Business surveys conducted in 1997 and 1999 involved businesses of any size. Business users were identified from E-PASS accounts that have at least three transponders.

A new feature in this survey (compared with past surveys) is the incorporation of a few open-ended questions in the above surveys. Responses to these open-ended questions are provided in their entirety in this report (see Appendix). We also provided complete transcripts of “other” responses that are part of closed-ended questions. The approximate number of phone calls for each of our survey efforts are shown below (along with the so-called “final call dispositions”), including a description of the calling protocols. The right column includes calls made to both cash users and non-customers. Residential households were called, and those that where either cash users or non-customers were eligible to participate. A total of 421 cash user and 401 non-customer surveys were completed (for a total of 822, shown below):

	<b>Residential E-PASS</b>	<b>Business</b>	<b>Cash &amp; Non-users</b>
Number of calls made	14,008	1,767	54,173
Different phone numbers	5,077	920	13,415
<i>Ineligible phone numbers:</i>			
Business or government office	81	0	83
Disconnected, fax/modem, no service, busy tone	267	195	1,101
No answer	829	11	1,173
No eligible respondent	170	255	1,923
No dial tone	65	14	41
<i>Total ineligible</i>	<i>1412</i>	<i>475</i>	<i>4,321</i>
<i>Potentially eligible phone numbers:</i>			
Answering machine	2,412	95	6,337
Refused to participate	251	43	1,355
Incomplete (early termination)	165	4	72
Call back	413	161	285
Language barrier	17	1	223
Complete	407	141	822
<i>Total</i>	<i>3,665</i>	<i>445</i>	<i>9,094</i>
<i>Response rate among those we spoke with:</i>			
	<i>32.4%</i>	<i>40.3%</i>	<i>29.8%</i>

Calling protocols included calling each phone number that resulted in an “answering machine” or “no answer” up to a maximum of at least four times in order to obtain a live respondent, and many of these numbers were dialed more than four times. Some respondents asked to be called back later. Phone numbers reported as “call backs” are those which we did not reach on a subsequent attempt, often because we had already completed the requisite number of surveys. Ineligible surveys among cash users and non-customers include E-PASS users and those under 18 years who are ineligible to participate. The number of “answering machines” shown above includes privacy managers. The response rate is calculated among potentially eligible respondents those with whom we spoke. For the E-PASS survey, this is calculated as  $407/(3,665-2,412)=32.4\%$ . The other responses rates are calculated similarly.

The sampling error for 400 completed surveys is about 4.9%. This means that, on repeated sampling, the results of this survey will be replicated in 95% of such replication efforts with a margin of no more than plus or minus 4.9%.

## RESULTS

### A. Profile of Respondents

Respondents of the E-PASS survey all have E-PASS accounts, and their geographic profile is consistent with that of all E-PASS account holders; 47.8% live in Orange County, 17.7% live in Seminole County and 34.5% live in other counties. Respondents of the cash users' survey used the toll roads in the Orlando area in the last six months and do not have E-PASS accounts; they are drawn from Orange County households (100.0%). Non-customer respondents have not used the toll roads in the past three months and do not have E-PASS accounts; they are drawn from Orange County (57.4%) and Seminole County (42.6%). Among business E-PASS respondents, 47.5% are located in Orange County, 31.9% in Seminole County and 20.6% in other counties.

The 2003 results show a continuing trend of increased, *infrequent* use of the Expressway among E-PASS users; those who use the toll roads fewer than five times weekly are now 50.7%. This is up from 47.3% in 201, 39.4% in 1999, and 27.1% in 1997. *Half of all E-PASS users use the toll roads less than five times per week.*

A majority of E-PASS users has college degrees (53.9%), and 76.0% have household incomes over \$45,000. Among cash users, 39.7% have college degrees and 44.7% of households with cash users had incomes over \$45,000. Among non-customers, 28.2% have a college degree and 37.4% have household incomes over \$45,000. The household income gap between E-PASS and cash users is substantial and has grown. In 2003, 44.7% of households with cash users had incomes over \$45,000, compared to 76.0% of E-PASS users. Thus,  $(76.0\% - 44.7\% =) 31.3\%$  more households with incomes over \$45,000 had E-PASS. In 2001, this difference was  $(70.9\% - 45.0\% =) 25.9\%$  (from tables below), and in 1999,  $(79.2\% - 59.0\% =) 20.2\%$ . Income and education levels are similar for cash users and non-customers between the 2003 and 2001 surveys.

Most business respondents (95.0%) operate more than five vehicles, and 91.8% of businesses have more than five vehicles that are equipped with an E-PASS. 64.5% of businesses use the toll roads more than 26 times weekly. Comparisons with the 1999 and 1997 business surveys should not be made, because these businesses employ at least 25 full-time employees. Half of all business have 50 full-time employees in the sample.

#### Summary:

<b>2003 findings:</b>	<b>E-PASS</b>	<b>Cash Users</b>	<b>Non-Customers</b>
Use $\geq 5$ weekly	49.3%	17.6%	n/a
$\geq \$45,000$ (household)	76.0%	44.7%	37.4%
College degree	53.9%	39.7%	28.2%
2 or more cars	85.5%	68.8%	58.7%

<b>2001 findings:</b>	<b>E-PASS</b>	<b>Cash Users</b>	<b>Non-Customers</b>
Use $\geq$ 5 weekly	52.7 %	25.5 %	n/a
$\geq$ \$45,000 (household)	70.9 %	45.0 %	41.5 %
College degree	53.2 %	37.3 %	27.7 %

<b>1999 findings:</b>	<b>E-PASS</b>	<b>Cash Users</b>	<b>Non-Customers</b>
Use $\geq$ 5 weekly	60.6 %	26.0 %	n/a
$\geq$ \$45,000 (household)	79.2 %	59.0 %	41.2 %
College degree	59.9 %	42.5 %	36.1 %

## B. Results

**Roads.** As in past years, respondents continue to be very satisfied with the toll roads, though in some instances less strongly so than in previous years. In this context, it should be noted that levels of dissatisfaction remain extremely low.

*Fast.* Respondents still believe the toll roads are faster than other roads. For example, 95.3% of E-PASS users agree or strongly agree with this statement, as do 92.8% of cash users, and 97.1% of business users. These percentages are quite similar to past years; the respective results in 2001 are 92.1%, 94.1% and 94.6%, which is within sampling errors. However, among those who only *strongly agree* a decline is noticeable: respectively 31.8% of E-PASS users strongly believe that the toll roads are faster in 2003, compared with 40.3% in 2001, 60.6% in 1999 and 68.3% in 1997. The respective findings among cash users are 20.4% (2003), 24.8% (2001), 32.4% (1999) and 45.9% (1997), and among business users: 31.9% (2003), 32.6% (2001), 44.1% (1999) and 66.3% (2003). The percentage of respondents who disagree or strongly disagree with the statement that the toll roads are faster remains low for all survey groups, respectively, 2.9% (E-PASS users), 5.5% (cash users) and 2.0% (business users).

*Maintenance.* Respondents agree that the roads are well maintained. 95.6% of E-PASS users agree or strongly agree that the toll roads are well maintained, as do 93.3% of cash users and 92.9% of business users. While these results are comparable to those of 2001 and 1999, a drop occurred among E-PASS users who *strongly agree* with this statement: respectively 17.0% (2003), 25.5% (2001), 31.3% (1999), 26.7% (1997). The percentage of cash users and business users who strongly agree with this statement is 12.1% and 18.4%, which are comparable to 2001 (respectively, 13.5% and 16.9%). It should be noted that few respondents state that the toll roads need more landscaping: respectively, only 19.5% (E-PASS users), 24.0% (cash users), and 14.2% (business users) agree or strongly with this statement.

*Signage.* Satisfaction with signage continues to be high. 88.4% of E-PASS users agree or strongly agree that the toll roads have adequate signage, as do 91.7% of cash users and 95.8% of business users. Respectively, 8.1%, 7.4% and 7.1% *strongly agree* with these

statements, which is less than in 1999 (resp. 19.8%, 9.5% and 10.1%). It should be noted that satisfaction with signage greatly increased between 1997 and 1999. Whereas in 1997 only 35.7% of E-PASS users agreed or strongly agreed that the signage was adequate, in 1999, 85.8% felt this way; This sharp increase was also found among cash users and business users, and has since remained at about current levels.

*Purpose of Using Toll Roads.* E-PASS users continue to describe a broad, and increasing range of purposes for which they use the toll roads. As a percentage of all uses, using E-PASS for commuting to work continues to *decrease*: 17.8% (2003), 24.1% (2001), 29.2% (1999) and 53.7% (1997). Indeed, as a share of all purposes, more users identify errands (23.3%, 2003) which, for first time *exceeds* the use of toll roads for commuting among E-PASS users (17.8% in 2001). However, as the table below shows, the decrease in the relative importance of commuting is a statistical artifact of other uses increasing: indeed, the total number of responses to all of these items increased from 556 in 2001, to 806 in 2003. Specifically, as shown below, the percentage of respondents who use the toll roads for commuting remained about constant at about 35%, but vacation and special event uses show significant increases. In this regard, it should be noted that both the 2003 and 2001 surveys were conducted in periods that included holidays. Note that the shift towards non-commuting purposes is consistent with the lower frequency of weekly use.

Percent of respondents who identified the following purposes:

	2003	2001
Commuting to work .....	35.2%	33.5 %
On the job travel .....	20.0	32.5
Errands .....	46.1	24.8
School .....	10.6	9.6
Vacation .....	24.9	4.8
Special Events .....	32.8	13.6
Other .....	28.6	21.6
N=	406	400
Number of purposes identified=	806	556

Frequently mentioned “other” purposes of using the Expressway are going to the airport, shopping, doctor visits, and visiting friends or family. E-PASS and cash users do not vary much in identifying such other purposes.

Among business users, 90.7% agree or strongly agree that their companies depend on the toll roads for getting around Central Florida.

*Frequency of Use.* As mentioned above, an increasing number of E-PASS users use the toll roads *less* than 5 times per week: 50.7% (2003), up from 47.3% (2001), 39.4% (1999), and 27.1% (1997). Most cash users also use the toll roads infrequently: 82.4% (2003), 74.5% (2001), and 74.0% (1999) and 52.7% (1997) use it less than five times per week. On average, E-PASS users use the toll roads 6.7 times per week, cash users, 3.8 per week (estimated means). Business users are frequent users, however, and few use it

less than 5 times per week: only 6.4% (2003) and 8.5% (2001). Prior surveys included small businesses, and among all business in prior years infrequent use was higher: 23.2% (1999) and 15.3% (1997).

*Toll Road Avoidance.* E-PASS and cash users were asked if they had avoided using the toll roads in the last three months. 29.6% of E-PASS users stated that they had avoided using the toll roads, and 37.3% of cash users indicated avoidance (similar as in past years). The most common reason given for avoiding the toll roads is to save money (respectively, 48.2% and 43.3%), which is down from 1999 (respectively, 60.6% and 58.7%). The most frequent other reason is “too much traffic on the toll roads” (resp. 15.3% and 19.3%).

Below are some selected “other” reasons for avoiding the Expressway (taken from E-PASS and cash users’ surveys):

*From E-PASS survey:*

Bugs on Lake Jessup  
Forgot my E-PASS  
E-PASS not working  
Traffic accident

*From cash users’ survey:*

Didn’t have the correct change  
Short distance not worth the money  
Avoid during rush hour  
Car accident

We also asked non-customers why they don’t use the toll road system. 40.9% state that it doesn’t go where they need it to go, 20.0% state that it is too expensive, and 18.9% provided other reasons. Some of these “other” reasons are shown below:

*From non-customers’ survey:*

Children got toll running incidents that went against my license  
Doesn’t drive that much anymore  
Convenient alternate routes are available  
Older driver, doesn’t like fast moving traffic  
Unhappy that we are still paying tolls for roads that have been paid off

*Toll Booth Employees.* Among cash users, 90.5% agree or strongly agree that toll booth employees are courteous, compared to 92.0% in 2001 and 81.5% in 1999.

**Safety. Overall Perceptions.** 72.2% of E-PASS users agree or strongly agree that the road is safer to use, as do 69.4% of cash users and 79.4% of business users. This result is lower for E-PASS users than in 2001, (81.3%), but similar to that in 1999 (74.8%) and somewhat lower than in 1997 (79.3%). The result of cash users is similar to past years (66.6% in 2001, 62.9% in 1999 and 63.1% in 1997), as is that of business users (76.1% in 2001, 73.6% in 1999), albeit somewhat higher in 1997 (86.9%). The percentage of respondents who *strongly agree* that the toll roads are safer to use is down among E-PASS users: 9.3% in 2003, and 27.5% in 2001 and 17.8% in 1999. It is possible that this drop reflects the opening up of new toll roads in West Orange County, attracting new drivers, as well as re-construction work on mainline toll plazas.

*Florida Highway Patrol.* In 2003, 68.0% of E-PASS users and 60.3% of cash users agree that enough police officers patrol the Expressway. These findings are similar to those of 2001 (resp. 65.0% and 63.8%). This year, we asked additional questions about this effort, as well as about the new Roadranger program (below). 87.2% of E-PASS users state that they know that the Florida Highway Patrol (FHP) patrols the Expressway, as do 81.7% of cash users. 76.8% of E-PASS users feel that such patrols make the Expressway safer, as do 78.1% of cash users (this percentage does not vary much according to whether respondents know that that FHP patrols the Expressway: among E-PASS users who do know that FHP patrols, 77.4% feel it makes it safer, versus 75.0% among those who did not know this).

*Roadrangers.* Among E-PASS users, 51.5% are familiar with the Roadranger program, and 68.0% state that Roadrangers make travel on the Expressway safer. Among E-PASS users who are familiar with this program, 89.0% state that it makes such travel safer. Among cash users, 42.3% are familiar with the Roadranger program, and 53.4% state that Roadrangers make travel on the Expressway safer. Among cash users who are familiar with this program, 88.8% state that it makes such travel safer. Although very few E-PASS users and cash users have ever been helped on the Expressway (resp. 6.7% and 7.9%), more than half report having seen motorists helped by a Roadranger (resp. 68.0% and 53.4%).

*Safe Speed Through Toll Booths.* In 2003, 46.3% of E-PASS users believe that people travel at safe speeds in the E-PASS lanes, (53.0% in 2001, 43.7% in 1999 and 63.2% in 1997), as do 44.7% of business users (50.0% in 2001, 42.0% in 1999 and 61.7% in 1997). Among cash users, only 34.2% agree that people travel at safe speeds through the E-PASS lanes (26.0% in 2001, 31.0% in 1999 and 43.8% in 1997). Among business users, 44.7% state that people travel through E-PASS lanes at safe speeds (50.0% in 2001, 42.0% in 1999 and 61.7% in 1997). 58.9% of business users state that large trucks should be required to drive through E-PASS lanes at slower speeds than smaller vehicles (63.3% in 2001).

**E-PASS. Overall Satisfaction.** 97.7% of E-PASS users are satisfied or very satisfied with their E-PASS (87.8% in 2001, 96.6% in 1999 and 96.0% in 1997). Similarly, many business users are also satisfied or very satisfied: 96.5% (2003), 93.9% (2001), 94.7% (1999) and 97.2% (1997). The minor dip in satisfaction among E-PASS users in 2001 may be attributed to the introduction of new windshield E-PASS device during the period of that study. In 2003, 95.6% of E-PASS users are aware that they can use their E-PASS statewide, and 75.6% are satisfied or very satisfied with their E-PASS on roads that have SunPASS (17.5% don't know)

*Service Center.* As in past years, the E-PASS service center employees draw high marks for their customer service. 45.6% report having ever called the service center (similar to past years: 47.6% in 2001, 48.7% in 1999 and 41.2% in 1997). Of those who did call, 80.0% report getting through in a timely manner (up from 73.0% in 2001), 88.1% had their questions answered to their satisfaction (up from 77.5% in 2001) and 90.3% state that the person on the phone was courteous (up from 74.2% in 2001). Overall, 90.3% of

such callers are satisfied or very satisfied with the service that they received (up from 80.9% in 2001). Among business users, 56.0% state that customer service centers should be located in other areas.

*Batteries.* 67.7% of E-PASS users are aware that they need to replace their batteries from time to time in their E-PASS device, and 38.4% are that they can do so for free.

*Discounts.* 63.8% of E-PASS users are aware that they receive a discount for frequent Expressway use (59.3% in 2001 and 79.0% in 1999), though only 14.7% state that such a discount causes them to use the Expressway more often. 33.30% of Cash users are aware of a discount for frequent use among those with an E-PASS device.

*Cash User Interest in E-PASS.* As in prior years, most cash users, 95.2%, have heard of the E-PASS toll collection device prior to the survey (87.0% in 2001, 92.9% in 1999 and 95.4% in 1997). The most common way for cash users to first learn about E-PASS is by word of mouth (33.9%) and television ads (32.9%). All other forms are much less common, such as literature at toll booth (7.0%), newspaper (7.0%), road sign (5.5%) and radio ad (4.0%). Hearing first about E-PASS through television ads greatly increased since 2001 (19.4%), which is attributed to increased use of television advertising in recent years.

In 2003, 20.9% of cash users state that they intend to sign up for E-PASS soon (22.2% in 2001, 23.5% in 1999 and 23.5% in 1997). The most frequent reason for not getting E-PASS is that respondents do not use the toll roads that much (62.7%, up from 53.3% in 2001 and 48.5% in 1999). Other reasons are highly diverse, and some are shown below:

*From cash users' survey:*

- \$25.00 start up fee
- I like to stop at places on the road
- I'm moving away
- Don't have credit card
- I use my parent's SunPASS
- I know the back roads
- Queen of procrastination
- Just moved here

In a separate question, 62.0% of cash users state that they would get the E-PASS transponder if it was free. Also, if tolls were increased for customers who pay cash, 47.3% would consider getting an E-PASS. 61.5% state that tolls would have to be increased by at least 25 cents for them to switch to E-PASS, though 16.2% would switch if the differential was 5 cents.

In an open-ended question, 59.6% stated that there was nothing the Expressway could do to encourage them to get them an E-PASS or that they didn't use the roads enough. However, 14.3% identified that getting the transponder for free would help, and 8.8% identified cheaper rates and discounts. Below are some specific suggestions for getting cash users to get an E-PASS:

*From cash users' survey:*

- Discount regardless of usage
- Ability to open an account without a credit card
- Give transponders for free
- A transponder that didn't have to go on the windshield
- Make transponder useable on roads in other parts of the country
- Two or three months of free tolls
- Add service centers at local stores or shopping malls

In a similar open-ended question, 74.8% of non-customers stated that there was nothing the Expressway could do to encourage them to use the Expressway, and 15.0% suggested making the tolls cheaper or eliminating them. Some specific suggestions (or, reasons why non-customers don't use the roads) from this survey are:

*From non-customers' survey:*

- Eliminate the tolls
- Roads don't go where I need them to go
- Lower the fees or tolls
- Not at my age
- Don't have a need for them

*Coupons with E-PASS?* Among E-PASS users, 57.1% would like to get free coupons for discounts at selected retail, restaurant, electronic and other stores, though only 6.9% would want to receive them if they cost \$1 extra. Among E-PASS users that would like to receive free coupons, 87.5% indicate that they would like to use them in restaurants, 46.1% would like to use them in retail stores, 28.4% for electronics, and 34.9% indicate a broad range of other purchases, notably for groceries, as well as movies and gas purchases. Among cash users, 36.3% are interested in getting E-PASS if it included monthly coupons for discounts at selected retail, restaurant, electronic and other stores, and 27.6% would be interested in getting E-PASS if it included monthly coupons for E-PASS users had to pay a modest amount, such as \$1 a month.

**Communications. Advertising.** Among E-PASS users, 75.4% have seen or heard advertising for the Expressway or E-PASS (up from 59.0% in 2001, 63.0% in 1999). Likewise, 74.6% of cash users have seen or heard advertising (up from 62.5% in 2001 and 52.9% in 1999), 69.1% of non-customers (74.0% in 2001 and 58.0% in 1999) and 87.2% of business users (up from 63.5% in 2001 and 59.1% in 1999). In 2003, all groups reported that the most common way of having heard such advertising was through television (respectively, 55.4%, 61.6%, 77.9% and 50.3%). Radio (resp. 15.0%, 12.1%, 7.8% and 20.4%) and billboards (resp. 19.6%, 14.3%, 6.6% and 15.9%) are the second and third most common methods.

*Expressway Navigator.* Among E-PASS users, 71.4% report having received the Expressway navigator and, among these, 75.9% read it, 73.1% finds that information useful, and 61.7% state that their overall opinion of the Expressway Navigator is "excellent" or "very good."

*E-Mail.* 81.5% of E-PASS users receive e-mail, as do 60.1% of cash users. Among E-PASS users who receive e-mail, 67.1% prefer to receive the Expressway Navigator by mail, 20.2% prefer to receive it by e-mail, and 40.8% state that they would read the Expressway navigator if they received it by e-mail. *43.0% cash users would like to receive information about the toll roads, and 36.1% would read it if sent by e-mail.*

*Website.* 31.5% of E-PASS users have visited the Expressway's website (up from 11.7% in 1999), as have 10.0% of cash users (up from 2.0% in 1999), 5.0% of non-customers (7.8% in 2001) and 48.2% of business users (4.5% in 1999). Among business users, 65.9% state that it is important or very important that they can access their E-PASS statement through the web, 62.4% that they can check their account balance on the web, 68.8% that they can update their account information on the web, 52.5% that they can view their account activity as it occurs, and 34.7% that they can monitor traffic conditions in real time.

*Familiarity.* As in past years, E-PASS users remain uncertain about who owns and operate the toll roads. Only 36.7% of E-PASS users (up from 29.8% in 2001) and 25.9% of cash users (up from 14.8% in 2001) correctly identify that the Expressway Authority owns and operates these toll roads. Among E-PASS users, 26.6% identify the Florida Department of Transportation, 7.4% Orange County, and 25.1% don't know. Among cash users, 25.9% identify the Expressway authority, 9.4% the Florida Department of Transportation, 12.3% Orange County, and 43.6% don't know. Among non-customers, 12.2% identify the Expressway authority, 23.2% the Florida Department of Transportation, 5.7% Orange County, and 55.1% don't know.

**Policy.** *Tax or Tolls?* Among E-PASS users, 38.4% prefer to fund new road projects by tolls, 22.9% by taxes and 38.6% don't know. Less support for tolls exists than in 2001, when 51.0% of E-PASS users preferred tolls, 29.8% prefer taxes and 19.3% didn't. It is possible that the present debate surrounding the present Orange County transportation tax referendum currently affects opinions on this matter. Among cash users, the current respective percentages are 31.6%, 58.0% and 10.5% (in 2001: 31.3%, 61.8% and 7.0%), and among non-customers 15.7%, 47.6% and 36.7% (in 2001: 26.8%, 44.5% and 28.8%)

*Congestion or Higher Tolls?* Among E-PASS users, 28.8% are willing to pay a higher toll to avoid congestions and delays, 64.3% are not willing, and 6.9% don't know (in 2001: 30.8%, 59.0% and 10.3%). Among cash users, these respective percentages are 31.6%, 58.0% and 10.5% (in 2001: 31.3%, 61.8% and 7.0%).

*Ticketing Toll Violators.* Strong support exists for ticketing toll violators. Among E-PASS users, 84.5% support ticketing toll violators, as do 84.1% of cash users and 87.2% of business users. This level of support is similar to that of previous years, but growing among cash users (81.8% in 2001, 72.7% in 1999 and 65.3% in 1997).

*Smart Cards.* Only 15.8% of E-PASS users are interested in receiving, as part of their E-PASS, a separate electronic card that could be used for selected purchases (such as parking or retail) that would be automatically billed to their E-PASS account.

## E-PASS USER SURVEY: 2003 survey.

Number of respondents shown for 2003 survey. Comparison with 1999 and 1997 results shown as possible. See 1997, 1999 and 2001 report for details about those studies.

### General

1. Have you used the toll roads in the Orlando area during the last six months? (n=406)

	2003	2001	1999	1997
Yes .....	100.0%	100.0 %	100.0%	100.0%
No.....	0.0	0.0	0.0	0.0

2. Do you have an E-PASS on your car? (n=406)

	2003	2001	1999	1997
Yes .....	100.0%	100.0 %	100.0%	100.0%
No.....	0.0	0.0	0.0	0.0

3. Who owns and operates the toll roads? Interviewer: do not read answers, choose one answer, only (n=406)

	2003	2001	1999	1997
Orange County Government ..	7.4%	16.8 %	20.5 %	8.3 %
Florida Dep't of Transportation*	26.6	18.5	10.3	8.8
Private Company.....	0.3	2.3	1.3	2.9
Private Investors .....	0.2	1.0	1.3	1.8
Expressway Authority.....	36.7	29.8	41.0	42.3
Other. ....	3.4	7.8	7.5	1.8
Don't Know. ....	25.1	24.3	18.3	34.0

\*) Includes "State" responses (20.4%)

4. How familiar are you with the Expressway Authority? (n=406)

	2003	2001	1999	1997
Very Familiar .....	4.2%	6.8 %	3.5%	3.4%
Familiar .....	9.4	10.3	14.5	16.9
Somewhat Familiar. ....	38.4	32.5	7.8	22.1
Not Familiar. ....	48.0	50.5	44.3	57.7

## 5. What is the zip code of the place where you live? (n=406)

	2003	2001	1999
Orange.....	47.8%	48.8 %	62.3 %
Seminole.....	17.7	20.0	25.3
Other.....	34.5	31.3	12.5

Note: 1999 question asked for zip code, and analyst classified response. The 2001 and 2003 sampling frame are based on an analysis of E-PASS records.

## 6. How often do you use the toll road system in an average week? (n=406)

	2003	2001	1999	1997
Less than 5 times.....	50.7%	47.3 %	39.4 %	27.1 %
5-10 times.....	27.3	29.8	32.2	46.5
11-15 times.....	13.5	11.8	17.1	21.6
16-25 times.....	4.9	7.3	7.3	4.7
More than 26 times .....	3.4	4.0	3.0	0.0

## 7. For what purposes do you normally use the Expressway system? list options, multiple responses allowed. (n=406, 804 responses provided)

	2003	2001	1999	1997
Commuting to work .....	17.8%	24.1 %	29.2 %	53.7 %
On the job travel .....	10.1	22.7	18.2	21.1
Errands.....	23.3	17.8	20.2	15.7
School .....	5.4	6.8	5.5	2.0
Vacation .....	12.6	3.4	7.0	0.7
Special Events.....	16.6	9.7	10.4	4.5
Other .....	14.3	15.5	9.5	2.2

In 2001, 556 responses provided.

See "other" responses following last question on this survey

## 8. In the last three months, have you ever avoided using the toll roads? (n=406)

	2003	2001	1999	1997
Yes .....	29.6%	32.8 %	29.3 %	21.8 %
No.....	70.4	67.3	70.7	78.2

## 8a. If yes, why? (list options. n=120, 170 responses).

	2003	2001	1999	1997
To save money.....	48.2%	42.6 %	60.6 %	68.3 %
Long waits at toll booths. ....	5.9	13.5	5.6	6.9

Not convenient .....	7.6	14.2	5.0	11.9
Too much traffic on the toll roads	15.3	9.5	12.0	5.9
Toll road doesn't go where I need to go.....	10.6	16.2	4.3	n/a
Other reason .....	12.4	4.1	12.7	6.9

In 2001, n=131, 148 responses provided.

See "other" responses following last question on this survey

9. Do you strongly agree, agree, disagree or strongly disagree that.....

9a. ...the toll roads are faster than other roads (n=406)

	2003	2001	1999	1997
Strongly Agree .....	31.8%	40.3 %	48.3 %	55.1 %
Agree.....	63.5	51.8	48.5	44.8
No Opinion.....	1.7	2.8	1.3	0.0
Disagree. ....	2.7	4.5	2.0	0.0
Strongly Disagree. ....	0.2	0.8	0.0	0.0

9b. ...the toll roads are cleaner than other roads. (n=406)

	2003	2001	1999	1997
Strongly Agree .....	18.7%	21.8 %	26.5 %	26.7 %
Agree.....	69.2	58.5	58.8	58.6
No Opinion.....	7.4	13.5	10.6	12.6
Disagree. ....	4.4	5.8	4.3	2.1
Strongly Disagree. ....	0.2	0.5	0.0	0.0

9c. ...the toll roads are well maintained. (n=406)

	2003	2001	1999	1997
Strongly Agree.....	17.0%	25.5 %	31.3 %	26.7 %
Agree.....	78.6	65.5	64.5	71.5
No Opinion.....	0.2	5.8	1.8	4.1
Disagree. ....	3.7	3.3	2.0	2.6
Strongly Disagree .....	0.5	0.0	0.5	0.0

9d. ...the toll roads are safer to use. (n=406)

	2003	2001	1999	1997
Strongly Agree .....	9.9%	27.5 %	17.8 %	10.1 %
Agree.....	62.3	53.8	57.0	69.2
No Opinion.....	13.5	10.3	10.8	15.0
Disagree .....	13.8	7.0	14.3	5.4

Strongly Disagree. ....	0.5	1.5	0.3	0.3
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9e. ...the toll roads need to have more landscaping (n=406)

	2003	2001	1999	1997
Strongly Agree.....	3.0	14.3 %	3.5 %	2.6 %
Agree.....	16.5	20.5	17.5	21.8
No Opinion.....	15.5	13.5	17.4	47.2
Disagree. ....	61.6	48.5	57.3	27.2
Strongly Disagree .....	3.4	3.3	4.5	1.3

9f. the toll roads have adequate signage (n=406)

	2003	2001	1999	1997
Strongly Agree.....	8.1%	19.8 %	19.0 %	5.5 %
Agree.....	80.3	64.0	66.8	30.2
No Opinion.....	1.5	5.3	1.5	15.2
Disagree .....	9.6	8.0	11.3	45.2
Strongly Disagree .....	0.5	3.0	1.5	3.7

## E-PASS

10. Have you received the Expressway Navigator newsletter? (n=406)

	2003	2001	1999
Yes .....	71.4%	57.8 %	59.8 %
No.....	20.9	32.3	29.6
Don't Know/ Can't Say .....	7.6	10.0	10.6

If yes,

10a. Did you read the Expressway Navigator newsletter? (n=290)

	2003	2001	1999
Yes .....	75.9%	75.3 %	40.5 %
No.....	23.8	23.8	33.9
Don't Know/ Can't Say .....	0.3	0.9	25.6

10b. Information contained in the Expressway Navigator is useful to me. (n=290)

	2003	2001	1999
Strongly Agree .....	10.3%	33.0 %	7.9 %
Agree.....	62.8	27.7	28.9
No Opinion.....	16.2	21.2	50.0

Disagree .....	9.7	10.8	12.3
Strongly Disagree .....	1.0	8.2	0.9

10c. What is your overall opinion of the Expressway Navigator?(n=290)

	2003	2001	1999
Excellent.....	14.5%	24.2	6.1 %
Very Good... ..	47.2	47.6	20.9
Average .....	36.2	22.1	62.6
Poor.....	2.1	6.1	10.4

11. Do you receive e-mail? (n=406)

	2003
Yes.....	81.5%
No .....	18.2
Don't Know.....	0.2

If Yes,

11a. Do you prefer to prefer to receive the Expressway Navigator by mail or by e-mail? (n=331)

	2003
Mail.....	67.1%
E-Mail .....	20.2
Both.....	3.0
Neither .....	8.5
No Opinion.....	1.2

11b. If the Expressway Navigator was to you sent by e-mail, would you read it? (n=331)

	2003
Yes .....	40.8%
No.....	52.3
Don't Know. ....	6.9

12. Have you ever called the service center? (n=406)

	2003	2001	1999	1997
Yes. ....	45.6%	47.6 %	48.7 %	41.2 %
No.....	54.4	52.4	51.3	58.8

If Yes...

12a. Did you get through in a timely manner, yes or no? (n=185)

	2003	2001	1999	1997
Yes .....	80.0%	73.0 %	81.5 %	89.0 %
No.....	13.5	24.7	18.5	11.0
DK.....	6.5	2.2		

12b. Were your questions answered to your satisfaction? (n=185)

	2003	2001	1999	1997
Yes .....	88.1%	77.5 %	93.8 %	94.4 %
No.....	10.8	18.0	6.2	5.6
DK.....	1.1	4.5		

12c. Was the person on the phone courteous? (n=185)

	2003	2001	1999	1997*
Yes .....	90.3%	74.2 %	89.3 %	94.4 %
No.....	5.9	23.6	10.7	5.6
DK.....	3.8	2.2		

\*) the item in 1997 is "was the person polite?"

12d. Overall, are you very satisfied, satisfied, dissatisfied or very dissatisfied with the service you received? (n=185)

	2003	2001	1999	1997
Very Satisfied .....	38.4%	41.6 %	39.3 %	27.2 %
Satisfied. ....	51.9	39.3	52.2	67.9
No Opinion.....	1.6	9.0	1.1	0.0
Dissatisfied.....	5.9	5.6	5.1	4.3
Very Dissatisfied.....	2.2	4.5	2.2	0.5

13. Overall, how satisfied are you with the E-PASS? (n=406)

	2003	2001	1999	1997
Very Satisfied .....	53.9%	58.0 %	73.0 %	34.9 %
Satisfied. ....	43.8	29.8	23.6	61.1
No Opinion.....	0.5	5.3	0.6	1.6
Dissatisfied.....	1.7	6.4	2.8	1.1
Very Dissatisfied.....	0.0	0.5	0.0	1.4

14. Are you aware that you can use your E-PASS Statewide? (n=406)

	2003
Yes.....	95.6%
No .....	3.9
Don't' Know/Can't Say .....	0.5

15. How satisfied are you with your E-PASS on roads that only have SunPASS? (n=406)

	2003
Very Satisfied .....	18.2%
Satisfied. ....	57.4
No Opinion. ....	17.5
Dissatisfied. ....	5.9
Very Dissatisfied .....	1.0

16. Have you visited the Expressway Authority website? (n=406)

	2003	2001	1999
Yes.....	31.5%	29.3 %	11.7 %
No.....	68.5	70.7	88.3

Note: This item in 1999 based on a small sample.

17. Would you like to receive, as part of having E-PASS, coupons for discounts at selected retail, restaurant, electronics and other stores? (n=406)

	2003
Yes.....	57.1%
No.....	39.2
DK .....	3.7

If "Yes":

18. For what type of purchases would you like to receive coupons? [ Do not read, check all that apply, ask for multiple responses ] (n=232, 478 responses)

	2003
a. restaurants .....	44.8%
b. retail .....	22.8
c. electronics .....	14.4

d. other, please state: \_\_\_\_\_ ..... 18.0

*See "other" responses following last question on this survey*

19. Would you like to receive such coupons for discounts at selected retail, restaurant, electronics and other stores, if you had to pay a modest amount extra, such as \$1 per month? (n=406)

	2003
Yes.....	6.9%
No.....	87.9
DK.....	5.2

## Safety

20. Are you familiar with the Roadranger program? (n=406)

	2003
Yes.....	51.5%
No.....	48.3
Don't' Know/Can't Say .....	0.2

If Yes,

20a. Have you ever been helped by a Roadranger on the Expressway? (n=209)

	2003
Yes.....	6.7%
No.....	93.3
Don't Know/Can't Say.	0.0

21. Have you seen motorists being helped by a Roadranger on the Expressway? (n=406)

	2003
Yes.....	60.1%
No.....	36.7
Don't' Know/Can't Say .....	3.2

22. Do you feel that Roadrangers make travel on the Expressway safer? (n=406)

2003

Yes.....	68.0%
No.....	10.1
Don't' Know/Can't Say .....	21.9

23. Do you think that enough police officers patrol the Expressway? (n=406)

	2003	2001	1999	1997*
Yes.....	68.0%	65.0 %	78.6 %	86.6 %
No.....	10.1	26.5	21.6	13.4
DK.....	21.9	8.5		

\*) in 1997, "do you think law enforcement on the Expressway is sufficient?"

24. Did you know that the Florida Highway Patrol patrols the Expressway? (n=406)

	2003
Yes.....	87.2%
No.....	10.8
Don't' Know/Can't Say .....	2.0

25. Do you feel that patrols by the Florida Highway Patrol make travel on the Expressway safer? (n=406)

	2003
Yes.....	76.8%
No.....	15.3
Don't' Know/Can't Say .....	7.9

26. Do people travel at safe speeds in the E-PASS lanes? (n=406)

	2003	2001	1999	1997
Yes.....	46.3%	53.0 %	43.7 %	63.2 %
No.....	49.6	43.0	56.3	36.8
DK.....	4.2	4.0		

## Toll Enforcement

27 . Do you believe police should issue tickets to toll violators? (n=406)

	2003	2001	1999	1997
Yes.....	84.5%	74.5 %	82.7 %	81.0 %

No.....	10.8	17.8	17.3	19.0
DK.....	4.7	7.8		

**Policy Issues**

28. Have you seen or heard any advertising for the Expressway Authority or E-PASS?  
(n=406)

	2003	2001	1999
Yes.....	75.4%	59.0 %	63.0 %
No.....	24.6	41.0	37.0

28a. If yes, where did you see or hear the advertising? (select all that apply.  
[ do not read, ask for multiple answers ] (n=306, 433responses )

	2003	2001	1999
Television .....	55.4%	18.7 %	33.2 %
Radio .....	15.0	27.0	21.2
Movie Theatre .....	0.2	11.2	2.2
Newspaper/magazine.....	6.3	12.7	11.1
Toll Booth.....	2.3	7.9	6.8
Direct Mail .....	1.1	10.5	15.3
Billboard.....	19.6	12.1	N/A

In 2001, n=236, 315 responses.

29. Are you aware that E-PASS customers receive a discount if they use the Expressway frequently? (n=406)

	2003	2001	1999
Yes.....	63.8%	59.3 %	79.0 %
No.....	36.2	40.7	21.0

If yes,

28. Does this discount increase your use of the Expressway? (n=259)

	2003
Yes .....	14.7%
No.....	85.3
Don't Know/Can't say	0.0

30. Are you interested in receiving, as part of your E-PASS, a separate electronic card that could be used for selected purchases such as parking or retail? Purchases using that card would be automatically billed to your E-PASS account. (n=406)

	2003
Yes.....	15.8%
No.....	79.1
DK .....	5.2

31. Would you be willing to pay a higher toll to avoid congestion and traffic delays? (n=406)

	2003	2001	1999
Yes.....	28.8%	30.8 %	28.5 %
No.....	64.3	59.0	62.8
Don't Know/Can't Say .....	6.9	10.3	8.8

32. Would you prefer to fund new road by (choose one, only): (n=406)

	2003	2001	1999
Raising Taxes.....	22.9	29.8 %	34.0 %
Paying Tolls .....	38.4	51.0	66.0
Don't Know/Can't Say .....	38.6*	19.3	

In 2003, includes 17.2% unsolicited "neither" responses (recorded by interviewers)

33. Are you aware that from time to time you need to replace the battery in your E-PASS transponder? (n=406)

	2003
Yes.....	67.7%
No .....	31.8
Don't' Know/Can't Say .....	0.5

34. Are you aware that you can replace the battery in your E-PASS transponder for free when it is time to do so? (n=406)

	2003
Yes.....	38.4%
No .....	61.3
Don't' Know/Can't Say .....	0.2

## Demographics

35. What is your gender? (n=406)

	2003	2001	1999	1997
Male .....	47.8%	53.3 %	51.0 %	46.3 %
Female.....	52.2	46.8	49.0	53.7

36. What is your education? (n=397)

	2003	2001	1999	1997
Some High School. ....	0.8%	2.9 %	3.3 %	2.5
Finished High School.....	14.6	15.5	10.3	11.4
Some college.....	30.7	28.4	26.6	25.3
Finished college .....	35.8	38.7	37.6	48.8
Graduate School.....	18.1	14.5	22.3	12.0

37. How many cars do you have in your household? (n=401)

	2003
1.....	14.5%
2.....	54.6
3 or more. ....	30.9

38. What is your age? (n=399)

	2003	2001	1999	1997
18-25 .....	8.3%	13.5 %	11.1 %	12.4
26-35. ....	14.3	26.5	24.6	23.2
36-45. ....	25.3	24.3	30.5	33.5
46-55. ....	23.6	21.5	19.2	22.4
56-65. ....	16.5	12.4	12.6	3.5
Over 65 years .....	12.0	1.7	2.1	4.9

39. What was your total household income last year? (n=259)

	2003	2001	1999	1997
Under \$15,000 .....	1.5%	4.0 %	5.0 %	2.7 %
\$15,000-\$24,999.....	4.2	5.3	4.3	7.4
\$25,000-\$34,999.....	5.0	9.3	5.3	9.6
\$35,000-\$44,999.....	13.1	10.5	6.3	10.4

\$45,000-\$54,999.....	11.6	14.2	14.8	20.1
\$55,000-\$64,999.....	10.8	8.1	14.2	20.6
\$65,000-\$74,999.....	5.4	9.3	50.2*	29.1*
over \$75,000.....	48.2	39.3		

\*)Includes over \$65,000

## Open-Ended Responses:

### 7. *For what purposes do you normally use the Expressway system?*

“Other” responses shown:

Airport (23)  
 Airport Or Shopping  
 Airport Or To Return To Other Home  
 Airport Or Visit  
 Airport, To The Turnpike  
 Church (2)  
 Doctor's Visit, To Go To Credit Union, Recreational  
 Doctor Visits  
 Doctors Appointments  
 For Business  
 For Fun  
 For Pleasure.  
 Go To Marina  
 Going Downtown  
 Going In And Out Of Orlando  
 Going Shopping  
 Going To Mall  
 Going To Orlando  
 I Just Get On It When I'm Going Some Where  
 I Sell Real Estate I'm On The Road All The Time  
 If They Need To Go To Stanford  
 Leisure  
 Medical, Visiting Relatives  
 Music Lessons  
 Organizational Type Work  
 Orlando Hospital Or Visiting  
 Personal  
 Pleasure (2)  
 Pleasure/To Go See My Family  
 Recreation  
 Recreation Travel  
 She Visit UCF Area  
 Shopping (7)  
 Shopping Or Visiting  
 Shopping, Airport Or Disney World  
 Social Business  
 To And From The Airports, Also Themes Parks  
 To Avoid I-4 Travel  
 To Get To One Place To Another  
 To Go Home And Back From School  
 To Go To Church In Orlando  
 To Go To Doctor, Shopping And To Go To Hospital  
 To Pre School

To Reach Airport Or Orlando  
 To Save Time  
 To Travel To The Airport Or Doctor Appointments  
 To Visit My Daughter  
 Traveling To The Doctor Or Hospital  
 Trips To Airport  
 Visit (2)  
 Visit County In Orange And Seminole County  
 Visit Family  
 Visit Friends (2)  
 Visiting (15)  
 Visiting / Disney  
 Visiting Family (5)  
 Visiting Friends (2)  
 Visiting Girlfriend  
 Visiting In Winter Springs  
 Visiting My Mom  
 Visiting Relatives (3)  
 Volunteer Work  
 Weekends Only

**8. In the last three months, have you ever avoided using the toll roads? If Yes, Why?)**

“Other” responses shown:

Bugs On Lake Jessup  
 Car Accidents Make Me Avoid The Toll Roads  
 Change Of Scenery  
 E-Pass Was Not Functioning  
 Easier On Regular Roads In Evening  
 Forgot E-Pass & Cash Or Just No Access Ramp At Needed Road (Good Homes Rd)  
 He Thinks It's To Expensive  
 I Could Get Same Place In Same Amount Of Time As The Toll Roads, Less Traffic  
 I Pay A Toll To Get In And Out And Don't Like It  
 If She Didn't Have The E-Pass With Her Or Any Money  
 Just To Expensive  
 No Change, So I Had To Get Off And Then Back On  
 Now Retired, Not In A Hurry, Why Spend The Money  
 Only In Case Of An Accident  
 Only Late At Night When There Is No Traffic On Other Roads  
 Other Routes Are Equally Convenient  
 Too Slow In The E-Pass Lanes  
 Traffic Accident Or Obstruction On Toll Road  
 When Fiancée Has My E-Pass  
 When My E-Pass Funds Are Depleted  
 When The Machines Don't Work

**18. For what type of purchases would you like to receive coupons?**

“Other” responses shown:

Airline  
 Attractions (2)  
 Automotive  
 Automotive Services  
 Automotive Supplies  
 Baby Stuff  
 Blockbuster  
 Bookstores  
 Bookstores, Home Depots And Lowe's, Grocery Stores  
 Car Wash, Car Maintenance, Oil Changes  
 Clothing  
 Clothing Stores, Gas Stations  
 Coupons On E-Pass  
 Discount For E-Pass  
 Discount On Theme Parks  
 Discount Rather Than 2 For 1 So That Singles Can Use At Restaurants  
 Dry Cleaners  
 Entertainment-movies  
 Entertainment (2)  
 Entertainment Like Theaters, Groceries, Gas  
 Entertainment: Movies And Restaurants, Also Theme Parks  
 For The House, Landscaping, Automotive Or Food  
 Gas  
 Gasoline  
 Gasoline, Amusement Parks  
 Gasoline, Prescription Drugs  
 Golf  
 Golf Courses  
 Golf Equipment  
 Groceries And Free Gas  
 Groceries, Auto Or Mechanical, Utilities Or Phone  
 Groceries, Gas (2)  
 Grocery (15)  
 Grocery And Hotels In Orlando  
 Grocery Coupons And Expressway Coupons, Also Travel Coupons  
 Grocery Discounts, Movie,  
 Grocery Stores And Movies  
 Grocery Stores Home Depot  
 Grocery Stores, Service Stations, Movie Theatre  
 Grocery Stores, Theme Parks (Restaurants And Other Food And Stores In The Park)  
 Home Depot  
 Home Depot, Gas Coupons, E-Pass Coupons, Pool Cleaning Coupons  
 Home Depot, Wal-Mart  
 Hotels & Motels (3)  
 Hotels And Theme Parks  
 House Hold Products  
 Lawn Equipment  
 Local Mall  
 Movie And Live Theaters

Movie Passes  
Movie Rentals, Book Stores  
Movie Theaters  
Movies  
Office Supplies And Import Stores: And Lowe's And Home Depot  
Pet Food Coupons  
Produce  
Recreation  
Restaurants Along The Turnpike: Theme Parks  
Service Station  
Special Events  
Sports  
Supermarkets  
Theater, Events  
Theme Parks (2)  
Theme Parks Or Groceries  
Woman's Shoe And Grocery Store

# CASH USERS SURVEY

Number of respondents shown for 2003 survey. Comparisons with 2001, 1999 and 1997 results shown as possible. Note: 1997 survey area limited to the 408 and 417 corridors. The 2003 and 2001 survey Orange County cash users, only.

## General

1. Have you used the toll roads in the Orlando area during the last six months? (if no, go to non-customer survey) (n=421)

	2003	2001	1999	1997
Yes.....	100.0%	96.3 %	100.0 %	100.0 %
No.....	0.0	3.8	0.0	0.0

2. (If yes to #1) Do you have an E-PASS on your car? (n=421)

	2003	2001	1999	1997
Yes.....	0.0%	0.3 %	0.0 %	0.0 %
No.....	100.0	99.8	100.0	100.0

3. Who owns and operates the toll roads? (n=374) Interviewer: do not read answers, choose one answer, only

	2003	2001	1999	1997
Orange County Government..	12.3%	24.3 %	23.4 %	4.7 %
Florida Dep't of Transportation.	9.4	15.8	17.1	20.2
Private Company.....	2.1	1.0	1.5	4.2
Private Investors .....	0.8	0.8	0.5	8.7
Expressway Authority.....	25.9	14.8	15.6	33.7
Other. ....	5.9	5.5	12.4	2.5
Don't Know .....	43.6	38.0	30.0	25.9

4. How familiar are you with the Expressway Authority? (n=421)

	2003	2001	1999	1997
Very Familiar .....	3.1%	4.3 %	4.1 %	0.8 %
Familiar .....	8.1	7.8	10.0	6.5
Somewhat Familiar. ....	25.7	24.5	24.4	24.6
Not Familiar. ....	63.2	63.3	61.5	68.1

## 5. What is the zip code of the place where you live? (n=421)

	2003	2001	1999
Orange .....	100.0%	97.0 %	74.6 %
Seminole.....	0.0	1.0	20.9
Other .....	0.0	2.0	4.5

## 6. How often do you use the toll road system in an average week? (n=421)

	2003	2001	1999	1997
Less than 5 times.....	82.4%	74.5 %	74.0 %	52.7 %
5-10 times .....	11.9	15.8	17.2	35.5
11-15 times. ....	4.3	3.4	5.2	8.6
16-25 times. ....	0.5	4.8	2.3	2.7
More than 26 times .....	1.0	1.8	1.3	0.5

## 7. For what purposes do you normally use the Expressway system? (list options, multiple responses allowed. n=421, 598 responses)

	2003	2001	1999
Commuting to work .....	13.4%	16.9 %	19.3 %
On the job travel .....	7.2	9.4	11.9
Errands.....	22.7	22.3	16.9
School .....	1.3	6.0	3.7
Vacation .....	10.3	3.6	8.4
Special Events.....	20.8	21.5	20.0
Other .....	24.2	20.3	19.9

*See "other" responses following last question on this survey*

## 8. In the last three months, have you ever avoided using the toll roads? (n=421)

	2003	2001	1999	1997
Yes .....	37.3%	41.5 %	42.8 %	74.3 %
No. ....	62.7	58.5	57.2	25.7

## 8a. If yes, why? (list options, n=157, 233 responses).

	2003	2001	1999	1997
To save money .....	43.3%	43.4 %	58.7 %	85.0 %
Long waits at toll booths.....	8.2	14.3	7.6	1.0
Not convenient.....	5.1	12.3	8.5	6.7
Too much traffic .....	19.3	18.9	10.4	4.8

Toll road doesn't go where I need to go .....	7.7	4.5	3.3	n/a
Other .....	16.3	6.4	11.4	2.6

See "other" responses following last question on this survey

9. Do you strongly agree, agree, disagree or strongly disagree that.....

a. ...the toll roads are faster than other roads (n=421)

	2003	2001	1999	1997
Strongly Agree .....	20.4%	24.8 %	32.4 %	45.9 %
Agree .....	72.4	69.3	59.0	48.9
No Opinion.....	1.7	1.0	2.2	3.9
Disagree. ....	5.5	4.8	6.1	1.0
Strongly Disagree. ....	0.0	0.3	0.2	0.2

b ...the toll roads are cleaner than other roads. (n=421)

	2003	2001	1999	1997
Strongly Agree .....	12.4%	12.8 %	17.1 %	8.6
Agree .....	71.3	69.3	63.9	61.7
No Opinion.....	9.0	9.3	9.3	24.1
Disagree. ....	7.1	8.5	9.8	5.2
Strongly Disagree. ....	0.2	0.3	0.0	0.5

c. ...the toll roads are well maintained. (n=421)

	2003	2001	1999	1997
Strongly Agree.....	12.1%	13.5 %	19.0 %	10.1 %
Agree.....	81.2	80.3	71.7	77.3
No Opinion.....	2.1	2.5	2.9	10.1
Disagree. ....	1.3	3.8	6.1	2.0
Strongly Disagree .....	0.2	0.0	0.2	0.5

d. ...the toll booth employees are courteous. (n=421)

	2003	2001	1999	1997
Strongly Agree .....	12.8%	19.5 %	15.1 %	7.9 %
Agree.....	77.7	72.5	66.3	57.7
No Opinion.....	4.5	3.0	7.3	19.1
Disagree .....	4.8	4.3	10.0	13.6
Strongly Disagree. ....	0.2	0.8	1.2	1.7

\*) the 1997 survey item is: "the employees are polite"

e ...the toll roads are safer to use. (n=421)

	2003	2001	1999	1997
Strongly Agree .....	7.4%	8.3 %	10.7 %	7.3 %
Agree.....	62.0	58.3	52.2	55.8
No Opinion.....	14.5	14.5	14.1	26.3
Disagree .....	15.4	17.8	21.2	10.0
Strongly Disagree. ....	0.7	1.3	1.7	0.8

f. ...the toll roads need to have more landscaping. (n=421)

	2003	2001	1999	1997
Strongly Agree.....	3.1%	25.8	2.4 %	4.7
Agree.....	20.9	31.5	19.0	24.7
No Opinion.....	16.2	21.3	17.8	38.4
Disagree. ....	55.6	11.3	54.9	26.2
Strongly Disagree .....	4.3	10.3	5.9	6.0

g. the toll roads have adequate signage (n=421)

	2003	2001	1999	1997
Strongly Agree.....	7.4%	9.5 %	17.3 %	13.9 %
Agree.....	84.3	77.8	68.8	48.5
No Opinion.....	1.0	2.5	2.0	18.4
Disagree .....	6.9	9.0	10.7	17.9
Strongly Disagree .....	0.5	1.3	1.2	1.2

## E-PASS

10. Have you heard about the E-PASS electronic toll collections system before today?  
(n=421)

	2003	2001	1999	1997
Yes.....	95.2%	87.0 %	92.9 %	95.4 %
No.....	4.8	13.0	7.1	4.6

10a. If yes, how did you first learn about the E-PASS? (pick one answer. n=401)

	2003	2001	1999	1997
Literature at toll booth .....	7.0%	3.1 %	11.8 %	7.5 %
Newspaper ad.....	7.0	10.6	11.6	8.3
Radio ad .....	4.0	2.6	4.0	3.6
Television ad.....	32.9	19.4	16.9	n/a
Direct mail .....	0.2	0.9	4.0	4.1
Word of mouth.....	33.9	36.3	31.1	40.9

Employer.....	1.7	4.2	4.5	4.9
E-PASS Service Center .....	1.2	0.0	0.9	1.6
Sign on road .....	5.5	12.9	8.1	21.9
Other .....	6.5	10.3	7.1	7.3

*See "other" responses following last question on this survey*

11. Do people travel at safe speeds in the E-PASS lanes? (n=421)

	2003	2001	1999	1997
Yes.....	34.2%	26.0 %	31.0 %	43.8
No.....	65.8	74.0	69.0	56.2

12. Do you intend to sign up for E-PASS soon? (n=421)

	2003	2001	1999	1997
Yes .....	20.9%	22.2 %	23.5 %	23.5 %
No.....	79.1	77.8	76.5	76.5

13. What is the your primary reason for not getting E-PASS (choose one, only. do not read. n=421):

	2003	2001	1999	1997*
Prefer to pay cash.....	2.4%	4.3 %	7.7 %	14.4 %
Too much trouble to get, it is inconvenient, or not enough time to get .....	3.6	11.8	16.4	41.7**
Don't use the toll roads that much	62.7	53.3	48.5	17.8
E-PASS costs extra/Expensive ....	5.7	13.5	4.8	n/a
I don't mind waiting to pay tolls ..	0.5	0.8	1.8	1.8
I don't want anyone to have a record of my travels .....	1.2	0.8	0.5	3.1
I can't get a receipt at the time of my transaction.....	0.0	0.8	0.5	6.3
Other .....	24.0	15.0	19.8	14.7

\*) in 1997, "why have you not chosen to sign up for E-PASS?" (chose one, only)

\*\*\*) recorded as separate items in 1997

*See "other" responses following last question on this survey*

14. If the E-PASS transponder was free, would you get an E-PASS? (n=421)

	2003
Yes.....	62.0%
No .....	30.9

Don't Know/Can't Say .....	7.1
----------------------------	-----

15. Would you be interested in getting E-PASS if it included monthly coupons for discounts at selected retail, restaurant, electronics and other stores? (n=421)

	2003
Yes.....	36.3
No.....	60.1
Don't Know/Can't Say .....	3.6

16. Would you be interested in getting E-PASS if it included monthly coupons for which you had to pay a modest amount, such as \$1 per month? Again, the coupons could be used for discounts at selected retail, restaurant, electronics and other stores? (n=421)

	2003
Yes.....	27.6%
No.....	67.7
Don't Know/Can't Say .....	4.8

17. Would you like to receive information about the toll roads? (n=421)

	2003
Yes.....	43.0%
No .....	55.3
Don't Know/Can't Say .....	1.7

18. If such information was sent to you by e-mail, would you read it? (n=421)

	2003
Yes.....	36.1%
No .....	63.2
Don't Know/Can't Say .....	0.7

19. Do you receive e-mail? (n=421)

	2003
Yes.....	60.1%
No .....	39.9

20. Have you visited the Expressway Authority website? (n=421)

	2003	2001	1999
Yes.....	10.0%	n/a	2.0 %
No.....	90.0	n/a	98.0

## Safety

21. Are you familiar with the Roadranger program? (n=421)

	2003
Yes.....	42.3%
No.....	57.7

If Yes,

21a. Have you ever been helped by a Roadranger on the Expressway? (n=178)

	2003
Yes.....	7.9%
No.....	91.6
Don't' Know/Can't Say .	0.6

22. Have you seen motorists being helped by a Roadranger on the Expressway? (n=421)

	2003
Yes.....	53.4%
No.....	45.8
Don't' Know/Can't Say .....	0.7

23. Do you feel that Roadrangers make travel on the Expressway safer? (n=421)

	2003
Yes.....	65.1%
No.....	16.6
Don't' Know/Can't Say .....	18.3

24. Do you think that enough police officers patrol the Expressway? (n=421)

	2003	2001	1999	1997
Yes .....	60.3%	63.8 %	70.7 %	85.4 %
No.....	24.0	24.0	29.3	14.6
DK.....	15.7	12.3		

\*) in 1997, "do you think law enforcement on the

Expressway is sufficient?"

25. Did you know that the Florida Highway Patrol patrols the Expressway? (n=421)

	2003
Yes.....	81.7%
No.....	16.9
Don't Know/Can't Say .....	1.4

26. Do you feel that patrols by the Florida Highway Patrol make travel on the Expressway safer? (n=421)

	2003
Yes.....	78.1
No.....	15.7
Don't Know/Can't Say .....	6.2

## Toll Enforcement

27. Do you believe police should issue tickets to toll violators? (n=421)

	2003	2001	1999	1997
Yes .....	84.1%	81.8 %	72.7 %	65.3 %
No.....	10.0	11.8	27.3	34.7
DK.....	5.9	6.5		

## Policy Issues

28. Have you seen or heard any advertising for the Expressway Authority or E-PASS? (n=421)

	2003	2001	1999
Yes.....	74.6%	62.5 %	52.9 %
No.....	25.4	37.5	47.1

If yes, 26a. Where did you see or hear the advertising? (select all that apply.  
314 respondents, 419 responses) [ do not read, ask for multiple answers ]

	2003	2001	1999
Television.....	61.6%	44.3 %	50.6 %
Radio.....	12.1	11.7	24.9
Movie Theatre.....	0.2	1.9	1.3

Newspaper/magazine.....	6.0	16.3	.0
Toll Booth.....	4.0	8.0	.9
Direct Mail.....	1.6	5.7	.3
Billboard.....	14.3	12.1	N/A

Note: in 2001, 250 respondents and 264 responses.

29. Are you aware that E-PASS customers receive a discount if they use the Expressway frequently? (n=421)

	2003	2001	1999
Yes.....	33.0%	39.0 %	42.0 %
No.....	67.0	61.0	58.0

30. Would you be willing to pay a higher toll to avoid congestion and traffic delays? (n=421)

	2003	2001	1999
Yes.....	31.6%	31.3 %	30.2 %
No.....	58.0	61.8	64.1
Don't Know/ Can't Say .....	10.5	7.0	5.5

31. Would you prefer to fund new road projects by (choose one, only. n=421):

	2003	2001	1999
Raising Taxes.....	17.3%	16.3 %	20.2 %
Tolls.....	39.9	55.5	58.5
Can't Say, Don't Know .....	42.8	28.3	21.2

32. If tolls were increased for customers who pay cash, would you consider getting E-PASS? (n=421)

	2003	2001
Yes.....	47.3%	57.0 %
No.....	44.7	31.5
Don't Know/ Can't Say/Depends* ....	8.1	11.5

\*) includes "depends on how much more expensive they became."

33. How much would cash tolls have to be increased for you to switch to E-PASS? Please complete the following sentence: (n=421)

"I would get E-PASS if a 50 cent toll was increased:

	2003	2001
5 cents.....	16.2%	14.0 %
10 cents .....	7.1	6.8
15 cents .....	4.5	3.3
20 cents.....	2.1	2.0
25 cents .....	8.6	7.0
More than 25 cents.....	61.5	67.0

34. Is there anything that the Expressway can do to encourage you to get an E-PASS transponder? [ OPEN –ENDED RESPONSE ] [ NEW FOR 2003 ] (n=421)

No, Nothing (unspecific)	182
Don't use the roads enough	69
Transponder for free	60
Cheaper, lower rates, discount, coupons	37
Easier to get E-PASS, need info	15
Tolls free	3
Plan to get E-PASS soon	7
Other	48

*See all responses following last question on this survey*

35. Is there anything else that the Expressway can do to encourage you to get an E-PASS transponder? [ NEW FOR 2003 ] (n=421)

Note to interviewer: This second question is especially important for respondents who state in response to the first open-ended question “make tolls free” and such.

No, Nothing (unspecific)	332
Don't use the roads enough	16
Transponder for free	12
Cheaper, lower rates, discount, coupons	21
Easier to get E-PASS, need info	6
Tolls free	2
Plan to get E-PASS soon	3
Other	31

*See all responses following last question on this survey*

## Demographics

36. What is your gender? (n=419)

	2003	2001	1999	1997
Male .....	44.6%	43.0 %	48.8 %	54.6 %
Female.....	55.4	57.0	51.2	45.4

## 37. What is your education? (n=411)

	2003	2001	1999	1997
Some High School .....	4.1%	5.4 %	4.1 %	1.3 %
Finished High School.....	25.4	24.7	18.1	10.0
Some College.....	28.5	32.7	35.2	47.3
Finished College .....	26.6	30.9	29.6	34.2
Graduate School.....	13.1	6.4	12.9	7.2

## 38. How many cars do you have in your household? (n=413)

	2003
1.....	31.2%
2.....	45.3
3 or more .....	23.5

## 39. What is your age? (n=410)

	2003	2001	1999	1997
18-25 .....	12.7%	18.1 %	20.1 %	38.3 %
26-35 .....	13.4	24.2	25.5	34.7
36-45 .....	20.5	29.1	22.6	17.4
46-55 .....	18.8	0.0	15.7	7.0
56-65 .....	15.4	14.1	8.4	2.6
Over 65 years .....	19.3	14.4	7.7	0.0

## 40. What was your total household income last year? (n=284)

	2003	2001	1999	1997
Under \$15,000 .....	6.3%	5.0%	5.6 %	15.3 %
\$15,000-\$24,999.....	15.5	15.7	10.7	13.4
\$25,000-\$34,999.....	17.3	16.7	13.7	24.7
\$35,000-\$44,999.....	16.2	17.6	10.9	16.3
\$45,000-\$54,999.....	13.7	12.9	17.3	13.9
\$55,000-\$64,999.....	7.4	7.9	11.6	6.6
\$65,000-\$74,999.....	4.9	5.3	30.1*	9.7 *
Over \$75,000.....	18.7	18.9		

\*) includes over \$65,000

## Open-Ended Responses:

### 7. *For what purposes do you normally use the Expressway system?*

“Other” responses shown:

Airport (4)  
 Airport And Downtown  
 Airport In Sanford  
 Doctor Appointments And Just To Go To The Other Side Of Town  
 Doctor Visits (7)  
 Doctor Visits, Visiting Family And Friends  
 Driving Parents, To Avoid Traffic Congestion  
 Emergencies Only Because You Can Go 80 MPH  
 Family In Coco Beach  
 Family Visits (3)  
 Family Visits In Fort Lauderdale  
 For Pleasure  
 For Speed To Go From One Point To Another  
 General Travel  
 Go To Meetings  
 Go To The Doctor  
 Go Visit On The Other End Of Town  
 Going Across Town  
 Going Shopping  
 Going To Airport From In-Laws  
 Going To Beach  
 Going To Coast  
 Going To Hospital In Gainesville And To Orlando Int'l Airport  
 Going To Tampa To Visit Or To The West Coast  
 Going To The Airport  
 Going to the Airport Or Coast  
 Going To The Beach  
 Going Visit Someone Or Going To Doctor Appointment  
 I Can Go Faster To Anyplace On Them  
 I Take it To Drop My Son Off Then I Take It To Work  
 I Use It To Go To Church  
 I Use The Toll To Go To Atlanta  
 I Use To Go Mail Box  
 If I'm In A Hurry  
 If I'm In Hurry I Don't Want To Go In Traffic  
 Job Interviews  
 Just Cruising  
 Just For Pleasure To Go Shopping  
 Just Go Downtown  
 Just Going Across Town To Visit Friend  
 Just In A Emergency  
 Just To Get Across Quickly  
 Just To Get Downtown

Just To Get Somewhere Faster  
 Just To Get To Where I'm Going, Mostly Recreational  
 Just To Go To The Bank  
 Just To Reduce The Traffic  
 Just Visiting  
 Lots Of Fishing To Brevard County And Family In Tampa And Ocala  
 Meet Friends In Orlando  
 On Business  
 Only To Beat The Traffic Lights  
 Only Uses Toll Roads When Going To The Airport  
 Only When I Go To The Airport  
 Personal Reasons  
 Quickest Way To Get To Relatives In Claremont  
 Recreation (2)  
 Retired Just Looking To See What I Can See  
 Same Time  
 Shopping (3)  
 Take My Children Places / Work / Wife To Hospital  
 The Airport Trips  
 To And From The Bicycle Paths  
 To Avoid Heavy Traffic  
 To Avoid Traffic  
 To Avoid Traffic On Regular Roads Like Colonial Dr  
 To Avoid Traffic Tie-ups  
 To Beat The Traffic  
 To Disney World, Conventions Or To Take Shortcuts  
 To Downtown Orlando To Visit Relatives  
 To Get Across Town  
 To Get Onto Turnpike & I-4  
 To Get To Downtown Orlando Or Disney Or Mall, Airport  
 To Get To Other Roads I Use  
 To Get To The Beach  
 To Get To The Other Side Of Town More Quickly  
 To Get To The Other Side Of Town.  
 To Get To West County  
 To Get To Where I'm Going Quick And Fast  
 To Go Fishing At The Beach  
 To Go See Friends  
 To Go Shopping  
 To Go To Church  
 To Go To Kissimmee  
 To Go To The Beach, The Airport And Visit To Tampa  
 To Go Up To Birksville  
 To Go Visit Relative  
 To Visit Children  
 To Visit Grandchild  
 To Visit Relatives (9)  
 Travel To Tampa To Visit Relatives  
 Trip To Hospital  
 Visit A Friend

Visit Family (3)  
 Visit Family In Other Counties  
 Visit Family Members  
 Visit Friends (5)  
 Visit Friends Or Relatives  
 Visit Grandparents  
 Visit Her Mom And To Go To The Airport  
 Visit My Friends And When I Go To The Airport  
 Visiting (5)  
 Visiting A Friend  
 Visiting Daughter  
 Visiting Family & Friends  
 Visiting In-laws  
 Visiting My Sister  
 When I'm In A Hurry And 50 Is Too Slow  
 When I'm Running Late  
 When I Go To The Other Side Of Town To Visit A friend Or Family  
 When I Need To Get Downtown In A Hurry  
 When Visiting Family  
 Whenever It Is Convenient

**8a. In the last three months, have you ever avoided using the toll roads? If Yes, why?**

“Other” responses shown:

Also When There Are Accidents  
 And Because I Was Not In A Hurry  
 Avoids Delays Caused By Accidents  
 Can't Exit The Toll Road When It's Busy  
 Depends If I Have Change Available  
 Did Not Have Change  
 Did Not Have Exact Change  
 Did Not Have Sufficient Change For The Toll  
 Didn't Feel Like The Short Distance I Had To Travel Was Worth The Money  
 Didn't Have Correct Change  
 Don't Drive That Much, I Only Use If I Have Too  
 Don't Like Paying For Roads That Never Get Fixed Or Paid For  
 Hate to Pay Money Like That  
 Have Plenty Of Time Now That I'm Semi-Retired, Won't Use The 417 (Too Expensive)  
 I-4 Is More Convenient And Good Access To Home  
 I Don't Carry Cash Normally  
 I Hate To Put All My Change In There  
 If I'm Running Late To Work I Use It, If Not I Go Around To Avoid The Tolls  
 If I Have Time I'll Avoid Using The Toll Roads  
 If I See An Accident  
 It Is Scary, You Can Fly Like An Airplane And Go 80 MPH  
 Just Didn't Go That Way  
 No Exact Change  
 Normally Don't Carry Cash, I Use My Debit Card  
 On 408 Between Cimarron Cole Plaza And Rosalind Too Much Congestion In Morning

Only During A Car Accident  
 Only If You Hear Of Car Accident  
 Only When Pulling A Trailer  
 Problems With Dean Exit Toll, Malfunction Causing Unwarranted Citations  
 Put Somebody In The Booth, Bill Changer  
 Safety, Speed Of Traffic  
 They Don't Have Toll Taker At The .25 Booth  
 To Enjoy The Scenery, Also Avoid Using The Expressway During Rush Hour  
 Too Expensive  
 Too Expensive And Some Times They Don't Work Well  
 When I Am Out Of Change  
 When I Have No Change In My Pocket  
 When I Have The Time Not To Use The Tolls

**10a. Have you ever heard about the E-PASS electronic toll collections system before today? If Yes, how did you first learn about E-PASS?**

“Other” responses shown:

A Friend Has It  
 Advertisement On TV  
 Advertising 3 Years Ago, Don't Recall Which Medium  
 Common Sense  
 Do Not Remember  
 Doesn't Remember  
 Don't Remember  
 Expressway Authority Signs On Highways  
 Going Thru The Change Booth  
 I Had One In The Past  
 I Saw It In Use  
 I Used To Have It (2)  
 My Son Has It  
 Newspaper Article (2)  
 No Idea  
 No Idea, It's Been So Long  
 On My Job  
 Radio Advertisement  
 Radio or TV, I Don't Remember Which  
 Sign At Toll Booth  
 Through My Son's Company  
 Too Long Ago To Remember  
 TV News  
 Unable To Recall, Many Years Ago

**13. What is your primary reason for not getting E-PASS?**

“Other” responses shown:

\$25.00 Start Up Fee

Almost All Others Do Not Observe The Speed Limit And It's Not Safe  
 Because He Does Not Have A Credit Card  
 Because I Do Not Use It That Often  
 Because I Don't Use So Much  
 Because I Don't Use Toll Roads That Much  
 Because I Have To Pay For The Transponder  
 Because I Rarely Use Toll Roads  
 Because They Have Ripped Me Off In The Past, No One Will Help Me Police  
 Cost Of Transponder, If All Cars In Household Were Allowed To Have E-Pass  
 Currently Changing Jobs, If Route To New Job Follows Toll Roads Will Get E-Pass  
 Did Not Keep Their Word, It Was To Be Free After It Was Paid For  
 Didn't Have The Necessary Funds, But Has Not Refinanced Yet  
 Disabled  
 Do Not Use Road Often Enough  
 Does Not Travel The Roads Often Enough  
 Doesn't Use It Enough  
 Doesn't Want Hassle Of Maintaining An Account Or Another End Of The Month Bill  
 Don't Believe In Using My Credit Card For This, I Don't Use Toll Roads Enough  
 Don't Know Where To Get One  
 Don't Like To Give Out Credit Card Info  
 Don't Need To Use The Toll Roads  
 Don't Use The Roads Enough  
 Don't Use Toll Roads Enough  
 Don't Want To Use A Credit Card To Pay For It  
 Effect It Will Have On The Job Market That One Less Person Will Not Have A Job  
 Financial Reasons, Unemployed  
 Going To Be Moving Out Of Country  
 Hasn't Needed To Use The Roads Enough Yet  
 Have 2 Cars Transferable? Expense Vs Usage, Other Roads More Convenient  
 Haven't Gotten Around To It Yet  
 Haven't Received Anything From Exp Authority, Haven't Had Time To Do On My Own  
 He Does Not Give His Credit Card Number To Anyone  
 He Is New To The Area  
 He Would Like To Be Charged Only When He Uses It  
 His Company Has An E-Pass For Him  
 I'm Moving Away  
 I Already Had An E-Pass  
 I Can Go Through E-Pass Lanes With The Pass We Have Now  
 I Don't Have Any Need For E-Pass  
 I Don't Like Computers To Take Care Of My Business  
 I Don't Travel That Much On The Toll Ways  
 I Don't Use It On A Daily Bases  
 I Don't Use Roads Enough  
 I Don't Use The Roads That Much  
 I Don't Want Money To Be Taken Out By Anybody From Account But Me  
 I Have Heard A Lot About Overcharging On Credit Cards For E-Pass  
 I Like To Stop At Other Places On Other Roads  
 I Use My Parents Sun-Pass  
 If There Is Another Special On The Transponder I May Get It  
 In The Process Of Moving

Infrequent Road Usage  
 Is No Discount And The E-Pass Lanes Are Too Long, The Change Lanes Are Far  
 Is Not That Familiar With The Area  
 It's Just Another Bill To Pay, Retiring Soon, Trying To Eliminate All Debt  
 It Is Very Unsafe, To Many Potential Accidents  
 Just Don't Feel The Need For It  
 Just Don't Need It, Gets Through The Tolls Just Happily Without It  
 Just Has Not Taken The Time To Get A E-Pass  
 Just Here For A Couple Of Months A Year  
 Just Lazy  
 Just Moved Here  
 Just Moved Here & Don't Know Anything About It  
 Just Moved Into Florida  
 Just Never Thought About Getting An E-Pass  
 Just Slow About Things  
 Lack Of Funds, No Checking Account  
 Lack Of Info And Interest  
 Lines Are Too Long  
 Missed The Last Promotion (For 2 Free Transponders)  
 Moving Out Of The State In 2 Weeks  
 My Friend Had Trouble With Charges That He Didn't Incur Using It  
 Never Use, I'm Not A Commuter  
 New To The Area And Not Familiar Enough With The Program  
 No Need Right Now  
 Not Going To Be Staying In The Area That Much Longer  
 Not Good In VA, DC, MD, OH, NJ, NY, PA Where We Travel A Lot  
 Not In As Much Of A Hurry, Feel Certain Sections Are Overpriced  
 Original Intent Was To Remove Toll Booths Once The Roads Were Paid, Like Lotto  
 Procrastination  
 Procrastinator  
 Queen Of Procrastination  
 Safety Reasons  
 She Knows All The Back Roads  
 So I Can Get Rid My Loose Change, So I Don't Have That Monthly Bill  
 There Is A Statement Fee And I Heard On News E-Pass Over-Charges On Toll Usage  
 They Need To Give User A Better Discount  
 Think It's Way Of Keeping Tabs On Everyone, Big Brother Is Watching  
 Toll Lanes Are Too High Speed  
 Toll Roads Out Of Way  
 Too Busy (3)  
 Too Hard To Keep Track Of Amount Of Money Left On E-Pass (Previous EPass Holder)  
 Too Many Other Things To Do  
 Transponder Costs \$25  
 Use It Strictly For Transporting Cars For Dealers  
 Waiting For Transponders To Be Free  
 We Are Retired People  
 We Just Don't Have A Reason To Get One  
 We Just Moved Here In January

**34. Is there anything that the Expressway can do to encourage you to get an E-PASS transponder?**

All responses shown:

*Analyzed by first response:*

No, Nothing (unspecific)	182
Don't use the roads enough	69
Transponder for free	60
Cheaper, lower rates, discount, coupons	37
Easier to get E-PASS, need info	15
Tolls free	3
Plan to get E-PASS soon	7
Other	48

A Discount Regardless Of Usage

A Major Way To Avoid I-4 To Make Travel Faster From Downtown Orlando, Current Route Is Very Dangerous, Too Much Traffic And Too High Speed Without Control

Ability To Open An Account With Out Using A Credit Card, Up Until This Call Thought He Needed A Credit Card

Both A Free Transponder And Increased Road Usage

Can't Think Of Anything Just Now

Cannot Think Of Anything At This Time (2)

Coupons, Free Transponder

Discount For Usage

Discount On Tolls

Discounts On Daily Round-Trip

Discounts On Monthly Bills

Don't Know, Not Really

Don't Know, Probably Not As We Aren't That Close To A Toll Road, Consequently We Don't Use It That Much

Don't Make I-4 Into Toll Road

Don't Think So

Don't Think So, Don't Travel That Much

Don't Use The Tolls Roads That Much

Don't Use Toll Roads That Much, Don't Use Tolls Anymore To Go To Work

Drop The Tolls (2)

Ease Of Getting An E-Pass Would Have To Be Increased, Do It By Mail Or Be Able To Buy At An Array Of Different Stores Or Kiosk On Impulse

Eliminate Toll Recording Errors, Billing Errors And Make Transponder Free

Free Transponder (10)

Free Transponder With \$40,00 Credit

Free Transponders

Get Me A Job

Give 10% Discount Instead Of Just 5% For E-Pass

Give A Discount

Give A Good Discount & A Free Transponder

Give Good Discounts,

Give Him A Discount Or Have The Transponder Be Free  
 Give Me Transponder Free  
 Give Roads For Free  
 Give The Transponder To Me For Free  
 Give Transponder Away Free  
 Give Transponder Free (2)  
 Give Transponder To Me Free, Just Like The One I Have From New Jersey  
 Give Transponders Away Free  
 Great Idea For A Multi Use, Pre-Paid Card Just For The Expressways  
 Had One, Didn't Use Very Often Due To Road Construction, Now We Don't Need It  
 Have A Trooper Sit At The E-Pass Lanes & Give People Going Over 25 A Ticket  
 Have More Of A Discount Which Would Lessen Payout For Toll Booth Employees  
 He Had One, Just Needs To Come To The Service Center To Make A Payment  
 He Plans To Get An E-Pass Soon  
 I Am Planning To Come To The Service Center Soon For One  
 I Didn't Think So  
 I Don't Know Offhand  
 I Don't Know What It Would Be  
 I Don't Know, I Am Not The Kind Of Person To Be Swayed  
 I Don't Use It Enough To Have One  
 I Guess Build More Roads That Went More Places  
 I Would Have To Use The Roads More  
 If I Could Use E-Pass Out Of State  
 If I Had A Job That Made Me Use It, I Would  
 If I Had More Information About Where And How To Get The E-Pass I Might Consider It  
 If I Lived Closer To Toll Roads  
 If I Traveled These Roads More Often I Would Get One  
 If I Used The Roads More Often,  
 If I Used The Transponder More Often, Then I Would Get One  
 If I Were Sent The Information In The Mail To Fill Out And It Was Free  
 If It Was Cheaper (2)  
 If It Was On A Different Location Beside The Windshield  
 If It Wasn't So Expensive I Would Get One  
 If My Employer Paid For It  
 If The Payment Situation Were Handled Differently, If Billed At End Of Month  
 If The Transponder Was Free I Would Consider It,  
 If The Transponders Were Free (3)  
 If The Transponders Were Free I Would Consider It  
 If There Was A 33% Or Better Discount Because It Is Extra Work To Maintain The  
 Account And Also Because It Is Not Tax Deductible  
 If There was a Different Type Of Transponder That Did Not Have to Go On The  
 Windshield  
 If There Was A Savings Over Cash Involved  
 If There Was Some Way For The Statement To Determine Whether I Used It For Business  
 Or Pleasure  
 If There Were Across The Board Discounts, Not Based On Usage  
 If There Were Some Sort Of Special Deal At First To Get Into It  
 If They Didn't Charge The \$50 Down Payment  
 If They Sent Me Information  
 If They Were Free Again I Might Consider Getting One

If Transponder Was Free (2)  
 If Transponder Was Free Or Discounted  
 If Transponders Were Free (2)  
 If Transponders Were Free And If I Used The Toll Roads More Often  
 If You Can Get Through Faster  
 If You Could Have Our Own Special Lane For E-Pass Only  
 Increase Of Road Frequency  
 Interstate Usage To New Jersey  
 It's Just A Matter Of Me Going To Do It  
 Just Charge A One Toll Payment To Get In And Then Be Able To Go As Far As You  
     Need To Go  
 Like I Said I Only Use The Expressway A Couple Of Times A Month  
 Lower Prices  
 Lower The Cost  
 Lower The Cost Of The Transponder  
 Lower The Cost Or Make It Free  
 Lower The Costs Of It  
 Lower The Fee For A Transponder  
 Lower The Price On Toll Roads  
 Lower The Toll Prices  
 Lower The Tolls (2)  
 Lower Tolls, Free Transponder And A Map For Everybody Who Wants One  
 Mail Info To The Home So That People Knows What It Is And How Much They Charge  
 Make It Easier To Get  
 Make It Free (17)  
 Make It Free Or Lower The Tolls  
 Make It Free, Make Deposit Amount Less  
 Make It Really Cheap  
 Make It Universal Or More Compatible With Mid-Atlantic And Northeastern Toll Roads  
 Make The Entrances More Accessible, Make Transponders Free  
 Make The Transponder Free  
 Make Them Free (2)  
 More Information About Them  
 Need More Information Concerning E-Pass, If It Would Save Me Money  
 No (103)  
 No At This Time  
 No Because I Don't Trust Them  
 No Because I Don't Use It  
 No because I Don't Use Roads That Often  
 No Because I Don't Use That Much When I Go Up North They Don't Go That Way  
 No Charge For The Transponder, E-Pass Should Be Cheaper Regardless Of The Number  
     Times You Use It  
 No He Has Not Use For It  
 No I'm Moving  
 No I'm Retired Don't Travel The Toll Roads That Much  
 No I Can't Afford It  
 No I Do Not Travel The Roads That Much To Get E-Pass  
 No I Don't Have Any Use For It  
 No I Don't Need To Use The Toll Roads  
 No I Don't Think So I Don't Use Toll Roads That Much

No I Don't Think So, Do You  
 No Idea  
 No Ma'am  
 No Not At This Time (2)  
 No Not Now  
 No Not Really (2)  
 No Not Really I Don't Use Roads That Much  
 No Not Really, I Don't Use The Toll Roads That Much  
 No Not That I Know Of  
 No Nothing  
 No Really (3)  
 No Really, Don't Do Much Driving, Usually Go With The Children  
 No, Don't Use The Toll Roads That Much  
 No, If The Tolls Are Increased, Will Avoid Using The Toll Roads  
 No, Absolutely Nothing  
 No, Because Don't Have That Much Need For It  
 No, Because I Don't Use The Roads Enough  
 No, Because I Don't Use The Roads Often Enough  
 No, Because I Just Don't Use The Toll Roads Enough  
 No, Because I Understood That When The East West Was Paid For, That The Tolls  
     Would Come Down, And So Far Not Even A Reduction In Tolls  
 No, Because The Pass We Have Is Sufficient  
 No, Because We Simply Don't Use The Roads Enough  
 No, Do Not Use The Toll Roads That Much  
 No, Does Not Use The Toll Roads That Much  
 No, Don't Guess, Does not use them that often That Often  
 No, Don't Have Time To Get Transponder And Don't Trust Them With Information On  
     Credit Card Or Billing  
 No, Don't Really Use Tolls Roads Much, In Process Of Getting Another Car Soon  
 No, Don't Think So  
 No, Don't Think So, Don't Use Toll Roads That Much  
 No, Don't Travel That Much  
 No, Don't Travel The Roads That Much  
 No, Don't Use It  
 No, Don't Use The Roads That Much  
 No, Don't Use The Toll Roads That Much (2)  
 No, Don't Use Toll Roads That Much  
 No, Don't Want People Having Records Of Transactions  
 No, Has To Re-up Again  
 No, Have No Need For It  
 No, I'm Moving  
 No, I Do Not Use The Toll Roads Enough To Warrant Getting An E-Pass  
 No, I Don't Believe So  
 No, I Don't Have A Need For It  
 No, I Don't Like The Way They Speed  
 No, I Don't Use It Enough (2)  
 No, I Just Don't Use It  
 No, I Think The Tolls Are Too High Per Mile, Open The Toll Roads For 90-days And See  
     What Happens To Interstate 4  
 No, I Would Have To Change Jobs

No, If I Need One I'd Get One, Simply Don't Use It Enough To Do That  
 No, It Was Suppose To Be Free, Don't Lie Anymore  
 No, Just Don't Use It That Often  
 No, Just Don't Use The Roads Enough  
 No, Just Don't Use The Toll Roads Enough  
 No, Just Don't Use Toll Roads That Frequent  
 No, Just Help People With Disabilities  
 No, Just Needs To Get His New Job  
 No, Not At The Moment  
 No, Not At This Time  
 No, Not Me  
 No, Not Really (3)  
 No, Not Really I Just Don't Want To Pay The Money  
 No, Not Really/ Does Use The Toll Roads That Much  
 No, Not Right Know  
 No, Not Today  
 No, Nothing At All  
 No, Nothing I Don't Use The Roads That Much  
 No, Only If It Was Free  
 No, Only More Familiarity And Increased Usage On My Part  
 No, Really Don't Use The Road That Much Just Now  
 No, She Does Not Use The Expressway Enough  
 No, The East West Toll Should Have Been Already Paid Off  
 No, They Said The Road Would Be Free Within 20 Years, And That Is Not So, Not Now  
     Free Or Well Maintained In The City (Where It Is All Concrete And Very Rough)  
 None (12)  
 Nope (5)  
 Nope, I Don't Use Them Enough  
 Not At The Time  
 Not At This Moment (2)  
 Not At This Point Because I Just Don't Use The Toll Roads Enough  
 Not At This Time  
 Not At This Time, Just Don't Use It  
 Not Enough Info About Initial Costs, Need More Info, & Free Transponder, Build One  
     Big Toll Terminal Like On University Instead Of Individual Toll Booth Access  
     Lanes In Order To Maintain Speed  
 Not Now Because Usage Is Very Infrequent, If Usage Increases, Discounts Would Make  
     A Difference  
 Not Really (3)  
 Not Really, Don't Drive That Much Anymore  
 Not Really, Don't Use The Toll Roads That Much  
 Not Really, I Just Don't Have A Need For It Right Now  
 Not Really, It's A Matter Of Frequency  
 Not Really, My Job Is On I-4  
 Not Right Now  
 Not That I Can Think Of  
 Not That I Know Of At This Time  
 Nothing (4)  
 Nothing At All  
 Nothing I Can Think Of

Nothing More  
 Nothing Other Than Raising The Cash Tolls  
 Nothing That Wasn't Already Mentioned,  
 Nothing, Because I Just Don't Use The Toll Roads Enough  
 Nothing, Don't Use The Toll Roads Enough To Be Rational - Increase Convenience Of  
 Getting Them, Increasing The Information About Availability  
 Offer Discount, Stop Closing Lanes, Lower Costs For Expressway, Add More Access,  
 Exit Ramps (Such As Turnpike 417), Put A Big Sign Up In Front Of Toll Booths  
 Stating Not An Info Booth (Stops Traffic For To Long When Directions Are  
 Asked)  
 Offer Free Or Reduced Rate For 2nd Transponder (One Per Household) Being Able To  
 Use E-Pass More Universally With Other States Particularly North East States  
 Offer The Transponder To Me Free  
 Probably Not (2)  
 Probably Not Due To Frequency Of Use Of The Expressway  
 Probably Not, But If I Were Given A Good Reason I Would  
 Put A Service Center In A Wal-Mart Open 24/7  
 Put Toll Booths Everywhere  
 Reduce Tolls  
 Right Now I Don't Think So Because I Don't Have A Need  
 Right Now/ Just Don't Have The Money  
 See Me E-mail About The E-Pass  
 She May In The Future  
 Take The "Extra" Money Expand And Improve The Existing Roads  
 They Should Advertise Where E-Pass Is Sold At, I Understand There Are Only A Couple  
 Of Spots, Not Enough Places To Purchase It  
 This Call Is Giving Her Info  
 This Conversation  
 To Make It Less Congested  
 Two Or Three Months Of Free Tolls  
 Um, I Just Don't Think I'm A Good Enough Candidate  
 Um, Not Really At This Time  
 We Are Currently In The Process Of Considering Getting An E-Pass  
 We Will Probably Get One Sooner Or Later  
 Well No Not Right Now  
 Well, I Don't Know  
 Well, If The Locations Were Better So That I Could Go Get One  
 Yes He Has An Application To Fill Out And Mail In  
 Yes Offer A Discount For People Who Have It  
 Yes, As Soon As I Can Get To It  
 Yes, Drop The Price \$20 For The Transponder  
 Yes, If I Can Get Transponder For Free  
 Yes, Send Me Info

***35. Is there anything else that the Expressway can do to encourage you to get an E-PASS transponder?***

All responses shown:

*Analyzed by first response:*

No, Nothing (unspecific)	332
Don't use the roads enough	16
Transponder for free	12
Cheaper, lower rates, discount, coupons	21
Easier to get E-PASS, need info	6
Tolls free	2
Plan to get E-PASS soon	3
Other	31

A Really, Good Discount  
 Can't Think Of Anything  
 Can't Think Of One Now  
 Clean Up I-4  
 Coupons, Bigger Discount  
 Discount On The Toll  
 Discounts (2)  
 Don't Be So Greedy  
 Don't Know, Not Really  
 Don't Think So  
 Don't Ticket People Who Do Pay, Make It More Efficient  
 Don't Use Toll Roads That Much To Have E-Pass  
 Eliminate Entrance And Exit Tolls  
 Free Coupon Thingies, Make It More Convenient, Add Service Centers At Local Stores,  
 Shopping Malls  
 Free One-Month Trial Plus Free Transponder  
 Free Tolls  
 Free Transponder  
 Free Transponders (2)  
 Get A Discount  
 Get Consultants From Georgia  
 Get E-Pass At A Local Post Office  
 Get The Application In  
 Give Away Free  
 Give My Husband A Break On Cash For Frequent Users  
 Give Transponder For Free  
 Good Discounts.  
 Good Rates For Senior Citizens  
 I'm Only Here For Three More Months  
 I Can't Think Of Anything Right Now  
 I Don't Know  
 I Don't Know, But They Sure Are Pushy  
 I Wouldn't Get It Because We Don't Need It  
 If Accessible By Mail Or Internet Or Something  
 If Got A Reasonable Discount For Using Toll Roads  
 If I Could Mail In Payments Instead of Using My Credit Cards  
 If I Had A Reason To Get It, I Would Get A Transponder  
 If I Traveled It More Often I Would  
 If I Used The Roads Every Day  
 If It Were More Convenient, Closer To My Neighborhood, To Get One

If They Gave You Lower Rates  
 If They Would Make The Investment A Bit More Realistic, If You Didn't Have To Invest  
 So Much Initially And Maintain Such A Significant Amount In The System  
 If Transponder Was Free  
 If Web Site Were Easier To Negotiate  
 If, It Weren't So Expensive Initially  
 It Should Be Cheaper To Open Accounts, A Machine To Give Change For \$1 Bills, The  
 Machine Could Give Back .50, Or Have Attendant On Duty  
 Just Don't Use It  
 Lower Price  
 Lower Rate For Frequent Users & Multi-Car Households  
 Mail Info  
 Make It At A Downtown Or City Hall Promotion  
 Make It Cheaper For The Elderly  
 Make Transponder Free  
 More Of A Discount On Tolls For Frequent Users  
 Need Own Lane So You Won't Be Held Up By Non-E-Pass Users  
 No (222)  
 No Annual Fee  
 No I do Not Trust Them  
 No I Don't Think So  
 No Ma'am  
 No More  
 No Not At All (3)  
 No Not At This Time Not At All  
 No Not Really (2)  
 No Nothing  
 No Nothing At All  
 No Nothing I Don't Need It  
 No Nothing Un Less I'd Change Jobs  
 No Thank You  
 No That's Fine  
 No That Would Be It  
 No, Because You Can Pay And Sometimes The Machines Don't Acknowledge It, And It  
 Won't Turn Green, Then You Pay Again And The Buzzer Goes Off, It's Too Much Of A  
 Pain  
 No, But I'll Pay Whenever I Do Use It  
 No, Can't Do Nothing For Me  
 No, Does Not Use The Toll Roads That Much  
 No, Don't Travel That Much  
 No, Don't Travel When The Roads Are That Crowded  
 No, Don't Use The Roads That Much  
 No, Frequency Of Usage Is Very Low  
 No, Give Me Some Discounts For Disney  
 No, I Can't Say That There Is, I Don't Use Toll Roads That Much  
 No, I Don't Think So  
 No, I Don't Think There Should Be Any Charge At All  
 No, I Don't Use It  
 No, I Have No Need For It  
 No, If They Mail It To His Home

No, Maybe More Information About It, Tell Me about The Prices And Things Like That  
 No, No Way  
 No, Not At This Point  
 No, Not At This Time  
 No, Not Now  
 No, Not Really (2)  
 No, Nothing  
 No, Nothing At All (3)  
 No, That's About It  
 No, The Sooner They Take Off The Tolls The Better We Will Be  
 No, They Have And Use 5 Cars And Not Sure Which One(s) To Put Transponder In  
 No, We've Considered The Options, If We Don't Have The Change Then We Shouldn't Be On It  
 No, We Are Retired  
 No, When The Tolls Were Initiated, They Told Us That The Tolls Would Be Eliminated After The Roads Were Paid For And Are Unequally Distributed: \$1.25 For 6-8 Miles From Airport To Exit 24  
 None (16)  
 Nope (6)  
 Not A Thing  
 Not At All  
 Not At This Moment (2)  
 Not At This Time  
 Not Charging For Transponders, Or At Least Only Charge Deposit Like In Virginia, If I Have To Pay For Transponder, I Will Not Get E-Pass As Matter Of Principle  
 Not For Me  
 Not One  
 Not Really (3)  
 Not Really, The Lines Are Not That Long At The Toll Booth / Would Have To Be Cheaper For Me To Use It  
 Not Really, They Are Already Going To Get One  
 Not That I Can Think Of  
 Nothing (29)  
 Nothing At All (2)  
 Nothing Else  
 Nothing Else Comes To Mind (2)  
 Nothing I Can Think Of  
 Offer It To Me Free  
 Oh, I Don't Think So  
 Only If Billed Once A Month  
 Put Toll Takers At Every Booth  
 Reduce The Wait In The E-Pass Lanes  
 Safer Lanes, Lower The Speed  
 Same As Above  
 Send Information To New State Residents To Educate And Inform Of What Options Are Available, Service Center Locations, Etc  
 Slow Down Traffic At The Booths  
 Some Other Discount Or Something Like That  
 Stopping Doesn't Bother Me, It's The Money

Take Some Of The Tolls Out, There's Too Many Tolls, They Make Plenty Of Money  
With Tourism  
That's About It  
Toll Control, Don't Raise Them Too High  
Toll Fees Are Hard To Be Collected Through Her Work  
Too Dangerous  
Um, No That's All  
Would Only Use It A Couple Times A Month, Don't Need It  
Yes, Free Transponder And Lower Tolls  
Yes, Later On We Will Get One  
Yes, Will Get One Soon Already (2)

# NON-CUSTOMER SURVEY

2003: OC and Seminole County surveying areas.

Number of respondents shown for 2003 survey. Comparison with 2001, 1999 and 1997 results shown as possible. Note: 2003 and 2001 surveys of Orange County and Seminole County residents, proportional to demographic distribution.

## General

1..Have you used the toll roads in the Orlando area during the last six months? (if no, continue) (n=401)

	2003	2001	1999	1997
Yes.....	0.0%	0.0 %	0.0 %	0.0 %
No.....	100.0	100.0	100.0	100.0

2. Do you drive a car? (n=401)

	2003	2001	1999
Yes .....	100.0%	100.0 %	100.0 %
No.....	0.0	0.0	0.0
Don't Know/ Can't Say .....	0.0	0.0	0.0

If NO or DON'T KNOW, thank the respondent and terminate the interview now. If YES, continue below.

3. What is the zip code of the place where you live? (n=399)

	2003	2001	1999
Orange.....	57.4%	53.9 %	82.0 %
Seminole .....	42.6	42.4	14.0
Other .....	0.0	3.8	4.0

4. Who owns and operates the toll roads? (choose one, only. n=401). Interviewer: do not read answers, choose one answer, only

	2003	2001	1999
Orange County Government .....	5.7%	11.8 %	43.1 %
Florida Dep't of Transportation. <sup>1</sup>	23.2	18.0	18.5
Private Company.....	0.7	9.3	1.5
Private Investors .....	0.2	1.0	0.0

Expressway Authority.....	12.2	32.0	20.0
Other. ....	2.7	7.0	16.9
Don't Know .....	55.1	21.0	

1) includes "state" responses (19.2%)

5. How familiar are you with the Expressway Authority? (n=401)

	2003	2001	1999	1997
Very Familiar .....	1.7%	12.0 %	5.0 %	4.4 %
Familiar .....	3.5	13.5	8.0	4.4
Somewhat Familiar. ....	20.9	39.3	20.0	26.7
Not Familiar. ....	73.8	35.3	67.0	64.4

6. Why do you not use the toll road system? (list options, multiple responses allowed. n=401, 529 responses).

	2003	2001	1999	1997
Doesn't go where I need to go....	40.9%	27.9 %	53.4 %	33.0 %
I don't know where it goes .....	8.0	17.9	14.0	n/a
Too expensive .....	20.0	15.7	12.3	47.7
Too much traffic .....	9.6	15.9	1.7	1.1
Unsafe .....	2.7	9.1	2.7	2.3
Other .....	18.9	13.5	15.8	15.9

In 2001, 400 respondents and 452 responses.

See "other" responses following last question on this survey

7. Toll roads are a good way to get around, but I don't have a need for their use.(n=401)

	2003	2001
Strongly Agree. ....	14.2%	41.0 %
Agree .....	71.3	32.0
No Opinion. ....	7.5	14.3
Disagree.....	6.7	3.8
Strongly Disagree .....	0.2	9.0

8. Have you seen or heard any advertising for the Expressway Authority or E-PASS? (n=401)

	2003	2001	1999
Yes.....	69.1%	74.0 %	58.0 %
No.....	30.9	26.0	42.0

8a. If Yes, where did you see or hear the advertising? (check all that apply. n=277, 321 responses) [ do not read, ask for multiple answers ]

	2003	2001	1999
Television.....	77.9%	28.2 %	55.7 %
Radio .....	7.8	20.7	14.8
Movie Theatre.....	0.0	18.6	1.6
Newspaper/magazine .....	5.0	16.4	13.1
Toll Booth.....	1.2	5.7	9.8
Direct Mail.....	1.5	7.7	4.9
Billboard .....	6.6	2.7	N/A

9. Would you prefer to fund new road projects by: (choose one, only): (n=401)

	2003	2001	1999
Raising Taxes.....	15.7%	26.8 %	16.0 %
Paying Tolls.....	47.6	44.5	64.0
Can't Say.....	36.7	28.8	20.0

10. Have you visited the Expressway Authority website? (n=401)

	2003	2001
Yes.....	5.0%	7.8 %
No.....	95.0	92.3

11. Is there anything that the Expressway can do to encourage you to use the Expressway?  
[ OPEN –ENDED RESPONSE ] [ NEW FOR 2003 ] (n=401)

No need for them, don't go where I need them to go, Don't drive that much	133
Nothing	167
Cheaper, discount, eliminate tolls	60
Free transponder	0
Other	41

*See all responses following last question on this survey*

12. Is there anything else that the Expressway can do to encourage you to use the Expressway? [ NEW FOR 2003 ]

Note to interviewer: This second question is especially important for respondents who state in response to the first open-ended question “make tolls free” and such.

No need for them, don't go where I need them to go, Don't drive that much	32
Nothing	325
Cheaper, discount, eliminate tolls	23
Free transponder	0
Other	21

*See all responses following last question on this survey*

## Demographics

13. What is your gender? (n=399)

	2003	2001	1999	1997
Male.....	36.3%	38.2 %	37.0 %	42.0 %
Female .....	63.7	61.8	63.0	58.0

14. What is your education? (n=386)

	2003	2001	1999	1997
Some High School .....	6.0%	6.0 %	6.2 %	0.0%
Finished High School.....	33.4	37.3	19.6	17.6
Some College .....	32.4	28.9	38.1	52.9
Finished College .....	18.1	19.3	26.8	22.4
Graduate School.....	10.1	8.4	9.3	7.1

15. How many cars do you have in your household? (n=390)

	2003
1 .....	40.5%
2 .....	41.3
3 or more .....	18.2

16. What is your age? (n=385)

	2003	2001	1999	1997
18-25 .....	8.1%	7.2 %	15.3 %	31.7 %
26-35 .....	11.7	34.4	25.5	23.2

36-45 .....	18.4	33.6	22.4	14.6
46-55 .....	13.2	16.8	10.2	15.9
56-65 .....	16.9	8.0	8.2	9.8
Over 65 years .....	31.7	0.0	18.4	4.9

17. What was your total household income last year? (n=247)

	2003	2001	1999	1997
Under \$15,000.....	4.7%	11.4 %	16.2 %	19.7 %
\$15,000-\$24,999 .....	23.1	16.3	14.7	21.1
\$25,000-\$34,999 .....	19.0	19.5	17.6	22.4
\$35,000-\$44,999 .....	13.0	11.4	10.3	17.1
\$45,000-\$54,999 .....	15.0	12.2	14.7	9.2
\$55,000-\$64,999 .....	4.5	29.3	10.3	6.6
\$65,000-\$74,999 .....	5.3	0.0	16.2*	3.9*
Over \$75,000.....	12.6	0.0		

\*) includes over \$65,000

## Open-Ended Responses:

### 6. *Why do you not use the toll road system?*

Other responses shown:

No need for it, doesn't go where I need them to go	38
Doesn't drive that much (anymore)	26
Bad traffic on toll roads	6
Other roads just as good	5
Other*	24

\*) includes "roads should have been paid off by now"

Being Delayed At The Booths  
 Better Management Of Traffic Patterns On North South Routes  
 Children Got Toll Running Incidents, Didn't Tell Me, Went Against My License  
 Convenient Alternate Routes Are Available  
 Do Not Work In That Direction  
 Does Not Believe That We Need To Pay For The Tolls Roads, We Just Keep Paying  
 Does Not Drive That Much Anymore  
 Doesn't Drive Much  
 Doesn't Drive That Much (2)  
 Doesn't Go Anywhere  
 Doesn't Go Where The Toll Roads Go  
 Doesn't Like the Idea Of Paying When We Already Pay Taxes  
 Don't Drive Much  
 Don't Get Out As Much As I Used To  
 Don't Go To Orlando  
 Don't Have A Reason To Use The Toll Road  
 Don't Have Any Reason To Use It  
 Don't Have The Need To Travel The Toll Roads  
 Don't Need To Use Toll Roads Any Longer  
 Don't Travel Anywhere There Is A Toll Road, Maybe Once A Year  
 Don't Travel Much  
 Don't Travel Out Of Town  
 Don't Travel That Much  
 Don't Travel That Much Anymore  
 Don't Travel That Much Where I Need To Use The Toll Roads  
 Don't Understand I-4  
 Don't Use Them  
 Double Taxation  
 Going Blind, I Don't Drive To Much Anymore  
 Hard To Get On And Off  
 Have Not Been Out On The Road That Much Yet/ Just Got My License  
 He Does Not Drive That Much Anymore  
 He Does Not Use The Tolls Roads, He Is In His 80's  
 He Only Drives To The Doctor And Grocery Store, He Is 85 Yrs Old

I'm Thinking About Getting It  
 I Am To Old To Be Up On That Kind Of Stuff  
 I Can Get To Where I Need Without It  
 I Do Not Want To Pay For Something I Don't Need  
 I Don't Drive That Far  
 I Don't Drive That Much Any More, Only When I Have To Go To Doctor, Just Locally  
 I Don't Go That Direction  
 I Don't Go That Way  
 I Don't Go Very Far From Home  
 I Don't Go Where It Goes  
 I Don't Have Need To Use The Tolls Roads  
 I Don't Need To  
 I Don't Travel That Much Out Town  
 I Don't Use it, I Don't Get On Highway  
 I Don't Want Give Them Any More Money, It's Suppose To Be Free By Now  
 I Have No Need To Get On The Highway  
 I Have No Reason (2)  
 I Just Don't Go Anyone  
 I Just Go To The Airport Once In While  
 I Just Stay Within The Local Area  
 I Only Go To Store And Doctor  
 I Use The Toll Roads When I'm Going Out Town  
 I Work Close To Where I Live, No Need To Use Toll Roads  
 Initial Period For Toll Collection Exceeded Initial Time Promised, Ticked Off  
 It's Easier For Me To Take The Aloma Road Than The Toll Road  
 Just Drives Locally  
 Just Travels Locally  
 Like To Take My Time, Pace On The Expressway Is Too Fast, Good For Long Trips  
 Live Here For 37+ Years And I Know All The Back Roads  
 Live Right Off I-4  
 Lives Close To The Job  
 Never In The Area, Only In The Area 3-4 Days A Week, Lives In Venezuela  
 No Reason To Use Them  
 Not Familiar With The Area Yet  
 Not Near Toll Roads  
 Not Working, So I Don't Need To Go That Far  
 Older Driver, Does Not Like Heavy Or Fast Moving Traffic  
 Only Go 5 Miles A Week, So It's Not Needed  
 Only Local Driving, No Need For Tolls Roads  
 Only Use The Tolls Roads When Necessary  
 People Speed Through The E-Pass, And I Don't Like It  
 Personal Belief That Roads Paid For Out Of Taxes, No Tolls Should Bond Retire  
 Problem With Leg, Can't Drive Too Far  
 Recent Medical Problems and Restricted Driving So I Don't Go Very Far  
 Retired And I Don't Travel Anymore  
 Retired, Can Take The Long Way  
 Retired, Don't Go Out Much Anymore  
 Senior Citizen Only Drives Locally  
 She Can Get Where She Wants To Go Without Using The Tolls Roads  
 She Does Use Them

She Is 75 Yrs Old And Does Not Travel That Much  
 She Is The Least Experience Driver  
 Standardize The Rate Because He Doesn't Know How Much He Is Going To Have To Pay  
 The Area I Travel Does Not Have To Be Toll Roads  
 There Are None That Go The Way I Go  
 Tolls Are Not Being Distributed Properly & State Is Not Handling Funds Properly  
 Travel Locally Only  
 Unhappy That We're Still Paying Tolls After It Has Paid For Itself By Now  
 Was Sick And Just Quit Driving That Far  
 We Have No Place To Go That Requires The Toll Roads  
 We Pay Taxes So Why Should We Have To Pay More To Drive On A Street  
 Where I Go I Don't Need To Get On The Expressway  
 Why Pay Extra To Use Roads  
 Work Is Close To Home, Don't Have To Get On Any Highway To Go To Work

**11. Is there anything that the Expressway can do to encourage you to use the Expressway?**

All responses shown:

*Analyzed by first response:*

No need for them, don't go where I need them to go, Don't drive that much	133
Nothing	167
Cheaper, discount, eliminate tolls	60
Free transponder	0
Other*	41

\*) includes "roads should have been paid off by now"

Build An Expressway From My House To School  
 Build Them Where I Am Moving  
 Can't Think Of Anything, Irritated By Previous Driver License Action Against Me  
 Cheapen The Price  
 Does Not Think So Unless She Needs To Use It  
 Don't Do Much Driving, 80 Yrs Of Age  
 Don't Drive That Much At All  
 Don't Go That Far From Home  
 Don't Know What That Could Be, Traffic Loads Will Be The Same  
 Don't Know, Not Sure  
 Don't Really Know  
 Don't Think So  
 Don't Think So At This Time  
 Don't Travel That At All, Only Locally  
 Don't Use Them, Useless to me  
 Drop The Cost Of Usage  
 Drop The Price Down A Little Bit For Tolls  
 Eliminate The Tolls  
 Get Me Free E-Pass Or Discount

Get Rid Of The Tolls plus They Are Also Dangerous  
 Have No Need To Travel The Expressway  
 Have No Need To Travel The Toll Roads  
 I'd Use It If I Had A Use For It  
 I Always Kind Of Thought If They Stop Making Us Pay Tolls That Would Alleviate I-4  
 Congestion  
 I Am A House Wife And Don't Need To Use It, I Do Use The Florida Turnpike At All  
 I Couldn't Say  
 I Don't Have No Reason To Drive On Those Roads  
 I Don't Like The Expressway Because Of All Of The Traffic  
 I Don't Need To Use Expressway. Costs Too Much Money  
 I Don't Need To Use Them  
 I Don't Think I'll Ever Use Those Roads  
 I Don't Think So, I Will Use It If I Go That Way  
 I Don't Think So. I Don't Think They Could Create A Need For It  
 I Doubt It  
 I Just Don't Go Anywhere That The Toll Road Goes, Everyplace I Go Is Close To Home,  
 I Would Use The Toll Roads To Get Some Place Faster, If They Went Where I  
 Needed To Go  
 I Use Every Day But I Don't Want to Get E-Pass  
 I Would Like Them To Name Them (Toll Ways) Instead Of Using A Bunch Of Numbers.  
 I Would Use It If I Had A Need For It  
 If Go To Our Property On The Other Side Town  
 If I'm Going That Way I'll Use It  
 If I Did I'd Be Wasting Money  
 If I Have To Go Out Of Town Like Tampa I Would Use The Toll Roads, Or If I Had A  
 Long Distance To Go, Would Not Use It For Local, To Expensive  
 If It Went To Different Area That I Want To Go To  
 If Some Place I Have To Go  
 In My Case, No  
 It Does Not Go Anywhere I Need To Use It  
 Just Don't Need To Use The Roads Any Longer, Work Is Close By Home  
 Just Don't Use It, Has Everything Close To The House  
 Just Drives Locally, No Need For Toll Roads  
 Knock Down The Tolls To A Reasonably Rate  
 Like I Said I Don't Go In That Direction  
 Lower Costs For Use  
 Lower Or Eliminate The Tolls  
 Lower Price  
 Lower Prices  
 Lower Prices Reduce Toll Booths  
 Lower The Fees  
 Lower The Prices  
 Lower The Rates Or Let The State Take Over  
 Lower The Toll  
 Lower The Toll Rates (2)  
 Lower The Tolls (9)  
 Lower The Tolls, 408 Change .75 To .50 And In All Cases \$1 Is Too Much Like On 417  
 Lower The Tolls, .75 To .50  
 Lower Tolls

Lower Tolls Or Do Away With Them Altogether  
 Lower Tolls, If She Goes To Visit Her Son In Melbourne She Has To Go Thru 3 Toll  
 Booths, Too Expensive  
 Make It Easier To Get Tokens Or Change  
 Make Lower Tolls  
 Make More Toll ways For Alternative To Go To Places, It Will Also Lessen Traffic  
 Make One Going The Way I Need  
 Maybe Make It So I Know Where I Need To Go If I Were To Use It, I Have Ridden With  
 Others While Using It, Better Signs, If I Were To Need It, Which I Do Not Would  
 Be Nice.  
 Maybe Send Me A Map  
 Move Me Where I Can Use Them  
 No (108)  
 No At All  
 No At This Time  
 No Because I Don't Have To Use It For Work  
 No Because I Don't Need To Get On It  
 No Because I Don't Use Them That Much  
 No Don't Go Where Need To Go  
 No I-4 Goes Where I Need To and That's All That Matters To Me  
 No I Do Not Have To Go That Way  
 No I Don't Do That Much Traveling  
 No I Don't Go On That Side Of Town That Much  
 No I Don't Go That Way  
 No I Don't Have A Reason To Get On The Toll Roads I'm Retired  
 No I Don't Have Any Reason To Get On  
 No I Don't Need It  
 No I Don't Need Them I Live Near My Work  
 No I Don't Travel That Way  
 No I Don't Use The Toll Roads  
 No I Don't Use Them Cause I'm Getting Up In Age  
 No I Have No Reason I'm Retired  
 No Kind Of Way  
 No Ma'am (3)  
 No Need For Expressway  
 No Need For Them For Them  
 No Need To Get On Toll Roads, Only Reason To Get On Toll Road Is To Go To The  
 Beach  
 No Not All  
 No Not At All  
 No Not Really (4)  
 No Not Until They Finish 429  
 No Nothing At All  
 No Reason, Take The Toll Off  
 No She Does Not Like The Speed Of The Traffic  
 No She Does Not Live Near The Expressway  
 No She Just Not Use Them, Only If She Goes On A Trip  
 No She Only Use The Tolls To Go To The Airports  
 No She Only Uses The Expressway About Twice Per Year  
 No They Don't Go Where I Go

No, Because I Just Don't Use The Roads Enough  
 No, At This Time  
 No, Because I'm Scared To Drive On It  
 No, Because I Have Everything Too Close Here  
 No, Because I Just Don't Travel Enough  
 No, Because I Just Don't Travel In That Direction  
 No, Because I Just Don't Travel It Often Enough  
 No, Because I No Longer Have To Go That Way  
 No, Because It's Not Where I Need To Go, We Live Very Close To Work  
 No, But If Business Was Expanded I Would Use Expressways  
 No, Cannot Think Of Anything  
 No, Destinations I Go To Don't Require It  
 No, Don't Drive On The Tolls Roads, Always Traveling With The Children  
 No, Don't Drive That Much, Too Old  
 No, Don't Have To Travel That Way  
 No, Don't Need It.  
 No, Don't Need To Travel That Much  
 No, Don't Travel That Far  
 No, Don't Use Them, Don't Need Them  
 No, Guess Not, Just Don't Have A Need  
 No, Have No Need  
 No, He Is Retired And Doesn't Need To Use It, It Is Not Convenient, There Should Be No  
     Tolls On The East-West Expressway Because It Has Now Been Paid For, It Has  
     Been For 30 Years  
 No, I Don't Go That Way (2)  
 No, I Don't Have Ant Need For Them  
 No, I Don't Need It.  
 No, I Don't Think So  
 No, I Don't Use The Roads Often Enough  
 No, I Just Don't Want To Go Near The Area  
 No, I Really Don't Travel That Much On The Toll Roads  
 No, I Will Only Use It For Longer Trips, Which Are Infrequent, Don't Need For Most  
     Local Trips  
 No, If I Was In the Area More I Would Use Them.  
 No, If I Were Going That Way  
 No, If They Made Me 20-Years Younger Then I Would Be All Over The Map  
 No, It's Just My Age  
 No, It's Just Too Expensive And I Would Rather Not Spend The Money  
 No, It's Too Expensive.  
 No, It Doesn't Go Where I Need It  
 No, Just Don't Need  
 No, Just Don't Travel That Much  
 No, Just Don't Use The Toll Roads That Much, Only For Airport  
 No, Lower Tolls  
 No, Need To Go That Way No Business In Orlando  
 No, No  
 No, None Whatsoever, Situation Has Deteriorated In Orange County To The Point Of  
     Moving Out Of Town  
 No, Not At All (2)  
 No, Not At All Retired And I Don't Travel That Much

No, Not At My Age  
 No, Not Now  
 No, Not Really  
 No, Not Really, Just Don't Need It  
 No, Not Unless I Had I A Job In Areas Served By The Tolls  
 No, Nothing At All  
 No, Only Travels Locally  
 No, Only Use When Have Too  
 No, Only Uses Tolls Roads When You Need To  
 No, Probably Not  
 No, The Places I Go I Don't Even Go Near The Toll Roads  
 No, The Roads Just Don't Go Where I Need Them To Go  
 No, The Roads Should Already Be Paid For  
 No, There Is Just No Advantage To Me To Use It  
 No, There Is Simply Too Much Traffic And I Don't Feel It's Safe  
 No, They Don't Control Traffic Very Well, Tolls Are Reasonable  
 No, Too Much And Too Fast Traffic  
 No, Too Expensive  
 No, Too Much Traffic / Need More Lanes  
 No, Too Old To Go Beyond 1/2 Mile From Home  
 No, Was Told That The Toll Roads Were To Become Toll-Free At The End Of The 80's  
     When Initial Construction Had Been Paid For, And This Has Yet To Happen  
 No, We're Retired, Have All The Time In The World, Can Avoid The Expressway With  
     No Penalty  
 No, We Just Don't Have A Need For It  
 No, We Just Don't Travel Much Away From Home  
 No, Will Use When She Goes Back To Work  
 No. Don't Drive That Much Anymore  
 None (5)  
 Nope (4)  
 Not At All, I Don't Drive That Far, I'm An Old Lady I Just Drive To Supermarket And  
 Church  
 Not Charge For Tolls  
 Not Much, Because I Don't Travel That Much  
 Not Necessarily  
 Not Now Because I'm Going To School  
 Not Really (6)  
 Not Really "Turn Back Time On My Age"  
 Not Really I Have No Reason  
 Not Really Unless I Move Go To Area That Has More Traffic  
 Not Really, Because I Don't Go Anywhere To Use It  
 Not Really, Don't Have A Need To Use The Toll Roads  
 Not Really, I Don't Like The Coin Receivers Because They Don't Work All The Time  
 Not Really, If I Get A Job That Requires Me To Use It, I Wouldn't Have To Be Coaxed  
 Not Really, It Would Only Apply If It Went To Certain Areas That I Went  
 Not Really, Only Use When Convenient  
 Not Really, Unless They Were Free  
 Not Really, Use It Only When I Have To  
 Not Really. Because I Just Don't Have A Need For It  
 Not That I Know

Not Under The Present Conditions, Spend All Tolls On Road Projects In The County  
 Where They Are Collected, Don't Send Any To Tallahassee And Double Deck I-4  
 Not Unless I Change My Way Of Direction  
 Nothing (4)  
 Nothing At All  
 Nothing At All, Thank You  
 Nothing I Can Think Of At The Moment  
 Nothing Personally, Medical Conditions Restrict My Driving For A While  
 Nothing, I Just Have No Use For Them  
 Only Drives Locally, No Need For The Toll Roads  
 Only If I Had To  
 Only If I Have To Go That Way  
 Only If I Needed It  
 Only Travels Locally  
 Only Uses Tolls Roads If You Have To Travel A Longer Distance  
 Open It Up A Little More Widely To Go To A Vast Array Of Places  
 Probably Not At This Time With My Situation  
 Probably Not Really  
 Probably Will Start Using It, Once I Get More Experience  
 Put Better Signs, Add More Lanes  
 Put More Info For Off And On Exits  
 Quit The Construction For 18 Months, Take The Tolls Out, Should Have Been Stopped  
 Or Reduced Already  
 Reduce Or Eliminate The Toll  
 Reduce The Tolls  
 Remove The Tolls  
 Slow The Speed Down To 30 Miles An Hour For Us Older Folks  
 Standardize The Rates So You Can Know Beforehand How Much It Will Cost  
 Stop Charging Toll  
 Stop Trying To Get Speed Rail In, Pay Off Toll Roads And Let People Use It, They  
 Stopped In Texas, We're Being Ripped Off  
 Take Away Tolls  
 Take Off All Tolls.  
 Take Off The Tolls Charge  
 Take Off The Tolls. Use Taxes To Absorb The Debt Instead Of Tolls  
 Take The Tolls Off  
 Tear Down Those Toll Booths Like They Did In Jacksonville  
 The Greenway Should Not Be A Tolls Road  
 The Roads Don't Go Where I Go  
 The Roads Just Don't Go Where I Need Them To Go  
 There's No Need When Other Roads Go The Same Place With No Tolls  
 They Are Not Where I Go  
 They Don't Go My Way  
 They Don't Go Where I Need To Go  
 Too Expensive  
 Too Expensive, Lower Tolls  
 We Do Use It But Don't Have The E-Pass  
 We Never Travel In The Area Of The Toll Roads, We Never Go That Way  
 Well, At This Point I Don't See Anything Special  
 Well, I Guess If It Were To Be Built To Go Where I Go, I Would Use It

Well, no  
 Well, No  
 Well, Not Really, It's A Great System Though  
 Will Use As Soon As They Become Familiar With The Area  
 Yes Do Away With The Tolls  
 Yes Do Not Have The Tolls  
 Yes I Would Use The Greenway If It Were Not So Expensive  
 Yes If The Tolls Road Would Go Close To His Work  
 Yes If They A Discount For The Tolls  
 Yes If They Lower The Rates For The Tolls Roads  
 Yes Lower The Rates On The Tolls Road They Are To Expensive  
 Yes, Make More People Leave FL

**12. Is there anything else that the Expressway can do to encourage you to use the Expressway?**

All responses shown:

*Analyzed by first response:*

No need for them, don't go where I need them to go, Don't drive that much	32
Nothing	325
Cheaper, discount, eliminate tolls	23
Free transponder	0
Other	21

At This Point No  
 Bring A Limo, Pick Me Up And Drive Me  
 Build Alternative To I-4 Going In East West Direction  
 Convenience Of It Being Accessible In More Than One Place  
 Don't Believe So, I Know All The Back Roads  
 Don't Do Much Driving, 80 Yrs Of Age  
 Don't Know, Not Sure  
 Don't Need To Use Toll Roads In Orlando, Interstates Are More Convenient  
 Don't Put A Toll On I-4  
 Don't Raise The Tolls So Much  
 Don't Think So  
 Don't Use Them  
 Eliminate Some Peak Hour Congestion  
 Extend The Distances For Which Tolls Are Good  
 Get Better People To Work In Toll Plaza  
 Have Some Outs, On I-4 No Where To Go  
 I-4 Is Too Congested Now  
 I Can't Think Of Anything  
 I Don't Believe So, If I Used Them More Maybe  
 I Don't Go That Way  
 I Don't Have Anywhere To Go On Them  
 I Don't Know Where I'd Go I Only Go In Between My Home Or Winter Park, Unless I  
     Had To Go To The Airport

I Don't Think So  
 I Don't Think So I Don't Use Them And I'm Retired  
 I Don't Think So, Too Far Away For Me, Besides That It's Too Expensive, They Do Not  
     Use The Tolls In The Proper Way.  
 I Guess For Me No, Cause My Job Is Next To My House  
 I Guess If It Were Quicker To Get Where I Were Going Using Them, Maybe If It Were  
     Better Advertised Where They Went  
 I Have No Need  
 I Just Don't Go Very Many Places  
 I Live Across The Street From My Job  
 I Would Use It If I Was Passing Through Orlando  
 If Had The Need, If I Worked That Way, I'd Use It  
 If I Had A Job To Get To I Suppose That Would Effect It  
 Increase The Speed Limit  
 Just Don't Need To Use Toll Roads  
 Less Traffic On The Toll Roads  
 Lower Prices  
 Lower The Prices  
 Lower The Rates  
 Lower The Tolls (3)  
 Lower Tolls (2)  
 Make It Free (5)  
 Make It Free, It Should Be Paid Off  
 Make It More Available  
 Make Tolls Cheaper  
 No (244)  
 No I Don't Have Any Reason To Use Them  
 No I Don't Think So  
 No If I Need To Go That Way, I Would Just Pay The Toll  
 No Need For Them  
 No Need To Go That Way  
 No Not At All (4)  
 No Not At This Time  
 No Nothing  
 No Where She Travels The Expressway Does Not Go  
 No, I Can't Think Of Anything  
 No, I Don't Know Anything  
 No, I Don't Think So.  
 No, I Drive As Little As Possible Anymore, Maybe To The Grocery Store  
 No, I Just Don't Have A Need For It  
 No, I Just Don't Use It  
 No, I Tolls Are Way Too High  
 No, I Travel I-4, So The Toll Roads Are Out Of The Way  
 No, I want To Control My Own Bank Account  
 No, If I Needed It, I Would Use It  
 No, It's Out Of My Way  
 No, Make It Free  
 No, No (2)  
 No, Not At This Time  
 No, Not Really (3)

No, That's All  
 No, That It Stop Charging Tolls  
 No, Too Much Traffic  
 None (10)  
 Nope (5)  
 Not At All  
 Not At This Time  
 Not Now  
 Not Off Hand  
 Not Really (4)  
 Not Really And I Have Eye Problems  
 Not Really, Not At This Time  
 Nothing (28)  
 Nothing At All (2)  
 Nothing Else Comes To Mind  
 Nothing That I Can Think At This Time  
 Nothing That I Know Of  
 People Hugging To Close Because Not Enough Lanes, People Drive Too Slow Or Too  
     Fast In Wrong Areas  
 Seldom Have Time To Use It  
 Slow It Down, I'm Old  
 Something To Show Where The Tolls Are And How Much  
 Take Away The Tolls  
 Take Off All The Traffic  
 Take Off The Charge  
 Then Lower The Tolls  
 Too Much Traffic  
 Use Resources More Wisely, For Instance, Why Is There A 4 Or 6 Lane Expressway  
     Overpass Over A 2 Lane County Road? Why Does The State Allow That To  
     Happen? This Is Harmful To Expansion Of State Roads  
 We Would Like To See More Places Where You Can Pick Up A Map So You Know  
     Where To Go, I'm Referring To Apopka Past 50 Up To "Ocoee" Need Maps, I  
     Don't Know Where They (Toll Ways) Go, It's Too Expensive To Just Explore  
     Routes  
 When We Originally Did It, It Was Only Supposed To Last Until Toll Roads Were Paid  
     Off, We Are Still Paying For Them, Remove The Politicians Out Of It  
 Will Use  
 Yes, Make Them More Parallel To I-4

# GENERAL BUSINESS SURVEY

Number of respondents shown for 2003 survey. Comparison with 2001, 1999 and 1997 results shown as possible. See that report for details about that study.

1a. What is your position with the company? (n=141)

	2003	2001
Owner .....	9.9%	12.3 %
CEO .....	0.7	4.6
Manager.....	51.1	43.1
Supervisor.....	8.5	8.5
Employee.....	2.1	7.7
Other .....	27.7	23.8

*See "other" responses following last question on this survey*

1b. How familiar are you with your company's vehicle operations (n=141)

	2003	2001
Very Familiar .....	68.8%	65.4 %
Familiar .....	22.0	27.7
Somewhat Familiar .....	9.2	6.9
Not Familiar .....	0.0	0.0

1c. How many full-time employees does your company have? Full-time is defined as any employee working more than 30 hours per week. Number: \_\_\_\_\_

2003: Median = 50.0, Mean =183.0

2001: Median = 60.0, Mean =345.0

To Interviewer: If less than 25, terminate the interview.

Note: The 2003 and 2001 business surveys require respondents' businesses to have a minimum of 25 employees, but not the 1999 and 1997 surveys. (see item Q5)

2. Who owns and operates the toll roads? (n=141) Interviewer: do not read answers, choose one answer, only

2003	2001	1999
------	------	------

Orange County Government .....	8.5%	11.5 %	30.6 %
Florida Dep't of Transportation..	28.4	19.2	21.5
Private Company.....	0.0	1.5	2.2
Private Investors .....	0.0	0.0	1.2
Expressway Authority.....	27.0	44.6	36.2
Other. ....	17.7	23.1	8.4
Don't Know .....	15.6	0.0	

2a. How familiar are you with the Expressway Authority? (n=141)

	2003	2001	1999	1997
Very Familiar .....	13.5%	20.0 %	6.8 %	1.5 %
Familiar .....	22.0	30.8	18.3	4.0
Somewhat Familiar.....	42.6	33.1	36.1	50.0
Not Familiar .....	22.0	16.2	38.8	44.5

3. What type of business are you in? (n=141)

	2003	2001	1999	1997
Government.....	5.7%	10.8 %	3.8 %	2.3 %
Industrial .....	5.7	13.1	6.8	18.0
Construction.....	38.3	19.2	23.1	16.5
Retail.....	9.2	10.8	13.3	5.0
Professional.....	2.8	14.6	26.3	11.3
Transportation Services .....	9.9	15.4	6.8	n/a
Other .....	28.4	16.2	20.1	58.0

*See "other" responses following last question on this survey*

4. How many vehicles does your company operate? (n=141)

	2003	2001	1999	1997
1-5 .....	5.0%	23.1 %	55.3 %	82.3 %
6-10 .....	19.9	14.6	14.9	16.5
11-15 .....	17.7	8.5	9.9	1.3
16-25 .....	20.6	11.5	4.8	0.0
26-35 .....	12.1	11.5	6.9	0.0
More than 35.....	24.8	30.8	8.3	0.0

5. How many vehicles have the E-PASS? (n=141)

	2003	2001	1999	1997
None.....	0.0%	3.9 %	5.2 %	0.0 %
1-5 .....	9.2	30.2	61.8	89.3

6-10 .....	27.7	21.7	13.3	9.5
11-15 .....	15.6	7.8	6.7	1.3
16-25 .....	23.4	9.3	5.2	0.0
26-35 .....	24.1	10.1	2.6	0.0
More than 35 .....	0.0	17.1	5.2	0.0

6. What is the zip code of the area in which your business is located? (n=141)

	2003	2001	1999
Orange.....	47.5%	54.6 %	62.2 %
Seminole .....	31.9	21.5	22.8
Other .....	20.6	23.8	15.0

Note: 1999 data revised. 1999 question asked for zip code, and analyst classified response. 2001 and 2003 surveys asks respondents the question identified above, and the sampling frames are based on an analysis of E-PASS records. See Methodology.

7. How often does your company use the toll road system in an average week? (n=141)

	2003	2001	1999	1997
Less than 5 .....	6.4%	8.5 %	23.2 %	15.3 %
6-10 .....	2.8	16.3	18.8	41.0
11-15 .....	8.5	8.5	10.3	24.8
16-25 .....	17.7	7.8	13.0	8.5
More than 26.....	64.5	58.9	34.6	10.5

8. From the standpoint of serving your company's needs, do you strongly agree, agree, disagree or strongly disagree that.....

a. ...the toll roads are faster than other roads (n=141)

	2003	2001	1999	1997
Strongly Agree .....	31.9%	32.6 %	44.1 %	66.3 %
Agree.....	65.2	62.0	53.4	29.9
No Opinion.....	0.7	3.1	1.0	n/a
Disagree.....	2.0	2.3	1.3	0.0
Strongly Disagree.....	0.0	0.0	0.3	3.8

b. ...the toll roads are cleaner than other roads. (n=141)

	2003	2001	1999	1997
Strongly Agree .....	22.0%	14.6 %	28.8 %	47.3 %
Agree.....	66.0	72.3	53.9	37.9

No Opinion.....	7.8	8.5	10.8	n/a
Disagree. ....	4.3	3.8	6.3	0.5
Strongly Disagree. ....	0.0	0.8	0.3	2.5

c. ...the toll roads are well maintained. (n=141)

	2003	2001	1999	1997
Strongly Agree.....	18.4%	16.9 %	25.8 %	37.2 %
Agree.....	74.5	79.2	66.9	59.7
No Opinion.....	2.1	1.5	4.3	n/a
Disagree. ....	5.0	1.5	2.0	0.5
Strongly Disagree .....	0.0	0.8	1.0	2.5

d. ...the toll roads are safer to use. (n=141)

	2003	2001	1999	1997
Strongly Agree.....	15.6%	9.2 %	14.0 %	30.4%
Agree.....	63.8	66.9	59.6	56.5
No Opinion.....	12.1	7.7	13.8	n/a
Disagree .....	8.5	14.6	11.5	10.6
Strongly Disagree. ....	0.0	1.5	1.0	2.5

e. ...the toll roads need to have more landscaping. (n=141)

	2003	2001	1999
Strongly Agree.....	4.3%	4.7 %	3.5 %
Agree.....	9.9	15.6	20.1
No Opinion.....	36.2	21.9	26.8
Disagree. ....	47.5	54.7	41.9
Strongly Disagree .....	2.1	3.1	7.8

f. the toll roads have adequate signage (n=141)

	2003	2001	1999	1997
Strongly Agree.....	7.1%	10.1 %	17.0 %	5.1 %
Agree.....	88.7	79.1	73.4	23.0
No Opinion.....	1.4	3.1	1.0	n/a
Disagree .....	2.8	7.8	8.0	48.1
Strongly Disagree .....	0.0	0.0	0.5	23.8

g. our company is willing to pay tolls in order to get where we need to go faster  
(n=141)

2003	2001
------	------

Strongly Agree.....	14.2%	15.0 %
Agree.....	80.9	70.9
No Opinion.....	3.5	3.9
Disagree .....	1.4	8.7
Strongly Disagree .....	0.0	1.6

h. our company depends on the toll roads for getting around Central Florida  
(n=141)

	2003	2001
Strongly Agree .....	18.4%	11.6 %
Agree.....	72.3	69.0
No Opinion.....	1.4	2.3
Disagree .....	7.8	15.5
Strongly Disagree .....	0.0	1.6

9. Have you visited the Expressway Authority website? (n=141)

	2003	2001	1999
Yes.....	48.2%	20.8	4.5 %
No.....	51.8	79.2	95.5

a. Does your company have E-PASS on its vehicles? (n=141)

	2003	2001
Yes.....	100.0%	100.0 %
No .....	0.0	0.0

If YES, Please continue with 9b, below

If NO, Please go to the next question, question 10.

How important are the following web site features to you? Please state whether they are Very Important, Important, Somewhat Important or Not Important.

b. Access to your E-PASS statement (n=141)

	2003	2001
Very Important .....	24.8%	26.5 %
Important. ....	41.1	38.2
Somewhat Important. ....	12.8	17.6
Unimportant.....	16.3	17.6
DK .....	5.0	0.0

c. Ability to check your account balance (n=141)

	2003	2001
Very Important .....	22.7%	24.3 %
Important. ....	39.7	34.0
Somewhat Important. ....	10.6	19.4
Unimportant.....	19.9	18.4
DK .....	7.1	3.9

d. Ability to update your account information (n=141)

	2003	2001
Very Important .....	22.7%	29.8 %
Important. ....	46.1	44.2
Somewhat Important. ....	13.5	14.4
Unimportant.....	12.1	9.6
DK .....	5.7	1.9

e. Ability to view your account activity as it occurs, in real time. (n=141)

	2003	2001
Very Important .....	14.9%	16.5 %
Important. ....	37.6	24.3
Somewhat Important. ....	15.6	25.2
Unimportant.....	23.4	30.1
DK .....	8.5	3.9

f. Ability to monitor traffic conditions as they happen, real time. (n=141)

	2003	2001
Very Important .....	9.2%	26.5 %
Important. ....	25.5	29.4
Somewhat Important. ....	17.7	11.8
Unimportant.....	39.0	27.5
DK .....	8.5	4.9

## TOLL ENFORCEMENT

10. Do you believe police should issue tickets to toll violators? (n=141)

	2003	2001	1999	1997
--	------	------	------	------

Yes .....	87.2%	86.8 %	80.7 %	96.2 %
No.....	7.8	10.9	19.3	3.8
DK.....	5.0	2.3		

## POLICY ISSUES

11. Have you seen or heard any advertising for the Expressway Authority or E-PASS?  
(n=141)

	2003	2001	1999
Yes.....	87.2%	63.5 %	59.1 %
No.....	7.8	36.5	40.9
DK.....	5.0		

11a. If yes, Where did you see or hear the advertising? (n=113,  
157 responses) [ do not read, ask for multiple answers ]

	2003	2001	1999
Television.....	50.3%	39.1 %	44.9 %
Radio.....	20.4	20.7	31.3
Movie Theatre.....	0.0	3.4	2.7
Newspaper/magazine.....	1.9	14.9	9.8
Toll Booth.....	1.3	0.0	5.1
Direct Mail.....	10.2	13.8	6.3
Billboard .....	15.9	8.1	(not asked)

12. Would your company be willing to pay a higher toll to avoid congestion and traffic delays? (n=141)

	2003	2001	1999
Yes .....	32.6%	40.0 %	20.3 %
No.....	44.0	41.5	60.9
Don't Know/Can't Say .....	23.4	18.5	18.8

13. Would you prefer to fund new road projects by (choose one, only. n=126):

	2003	2001	1999
Raising Taxes.....	15.6%	26.2 %	35.1 %
Tolls .....	51.8	70.8	64.9
Don't Know/Can't Say .....	32.6	3.8	

## E-PASS

14. Does your company use E-PASS, the electronic toll collection device? (n=141)

	2003	2001
Yes.....	100.0%	100.0 %
No.....	0.0	0.0
DK/CS.....	0.0	0.0

b. If NO or DK/CS, terminate interview now. If YES, continue.

15. Overall, how satisfied is your company with its E-PASS? (n=141)

	2003	2001	1999	1997
Very Satisfied .....	66.7%	46.2 %	58.1 %	84.3 %
Satisfied .....	29.8	47.7	36.6	12.9
No Opinion.....	1.4	4.6	3.5	0.3
Dissatisfied.....	2.1	0.8	1.5	2.5
Very Dissatisfied.....	0.0	0.8	0.3	0.0

16. Do you think customer service centers should be located in other areas? (n=141)

	2003	2001	1999	1997
Yes .....	56.0%	58.5 %	78.1 %	35.4 %
No.....	44.0	41.5	21.9	64.6

17. Do people travel at safe speeds in the E-PASS lanes? (n=141)

	2003	2001	1999	1997
Yes .....	44.7%	50.0 %	42.0 %	61.7 %
No.....	55.3	50.0	57.9	38.3

18. Should large trucks be required to drive through E-PASS lanes at slower speeds than smaller vehicle? (n=141)

	2003	2001
Yes .....	58.9%	63.3 %
No.....	35.5	30.5
DK/CS.....	5.7	6.3

## Open-Ended Responses:

### *1a. What is your position with the company?*

“Other” responses shown:

Account Administrator  
 Accountant  
 Accounts Payable (2)  
 Administrative Assistant (6)  
 Administrator  
 Administrator Of Operations  
 Assistant Director  
 Asst Controller  
 Book Keeper  
 Comptroller (2)  
 COO  
 Director of Operations (2)  
 Divisional Controller  
 Executive Secretary  
 Fiscal Assistant  
 Human Resource  
 North American Fleet Compliance Administrator  
 Office Administrator  
 Office Manager (3)  
 Safety Coordinator  
 Secretary (2)  
 Senior Buyer  
 Service Coordinator  
 Special Projects Coordinator / Dispatcher  
 Staff Assistant At Support Services  
 Technical Assistant  
 Vice President  
 VP Of Finance

### *3b. What type of business are you in?*

“Other” responses shown:

Advertising  
 Ambulance Services  
 Body Parts For Cars & Trucks  
 Citrus Producing Company  
 Distribution  
 Durable Medical Equipment  
 Educational Institution  
 Electric Utilities (2)

Electrical Distributor  
Engineering  
Florist  
Heating / Air Conditioning  
HVAC  
Landscaping (2)  
Linen Service  
Manufacture Fountains  
Manufacturing  
Meat Wholesale Distributor  
Mfg Cabinet  
Mfg Concrete Steps  
Nestle Ice Cream  
Plumbing Company  
Police Dept  
Printing  
Produce Wholesaler  
Rental  
Service (2)  
Utility Services  
Waste Management  
Wholesale (4)  
Wholesale Distribution (2)  
Wholesale Manufacture  
Wholesale Nursery