



Orlando-Orange County Expressway Authority Customer Opinion Survey

Final Report

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1 EXECUTIVE SUMMARY

1.1 BACKGROUND

This report presents a summary of findings resulting from an opinion survey, that was conducted between June and July 2008, for customers of the Orlando-Orange County Expressway Authority (OOCEA). The results are intended to provide OOCEA with a benchmark of customer satisfaction perceptions as it relates to performance and customer service.

JRD & Associates, Inc. (JRD), an Industrial Engineering and Management Consulting firm with significant expertise and experience in performing customer satisfaction surveys, was engaged by OOCEA to conduct a comprehensive opinion survey for users of the E-PASS electronic tolls payment system.

The major objectives of this project were to:

- Design and develop survey instruments to include questions related to demographics, usage, safety, communication and overall satisfaction, as well as open-ended questions. Surveys were developed in English and Spanish.
- Conduct mail and phone surveys.
- Develop and manage online surveys.
- Prepare and present Draft and Final Reports.
- Develop Power Point Presentation.
- Present survey findings to OOCEA staff and Board.

The survey included the following user categories:

- E-PASS Users (Drivers having E-PASS transponder).
- Cash Users (Drivers who do not have E-PASS but use the toll roads).

OOCEA's database of E-PASS users (approximately 300,000) was used to randomly select 30,000 customers to whom the survey was mailed by OOCEA. Those that were completed and returned by the customers were mailed by OOCEA to JRD for its further processing and summary analysis.

Finally, OOCEA handed out approximately 5,000 surveys, intended for the cash users, at its toll booths. In addition, JRD randomly selected 1,000 individuals from the Orlando Telephone White Pages to conduct a telephone survey. All surveys included a link to a website to respond via Internet if the individuals preferred. All surveys were available in English and Spanish.

1.2 SURVEY FINDINGS

A total of 7,261 surveys were received, resulting in a response rate of 20.2%. This number includes all mail, phone and online surveys. Table 1 depicts the total number of surveys distributed, received and corresponding response rates.

**Table 1
 Total Number of Surveys Received**

Survey Audience	Number of Surveys Distributed	Number Received	Response Rate (%)
E-PASS			
Mail	30,000	6,622	N/A
Phone	N/A	41	N/A
Online	N/A	280	N/A
Sub-total	30,000	6,943	23.1%
Cash			
Toll booths	5,000	291	N/A
Phone	N/A	10	N/A
Online	N/A	15	N/A
Sub-total	5,000	316	6.3%
Total	35,000	7,259	20.2%

Overall Satisfaction

- Overwhelmingly, 91% of E-PASS users are overall satisfied with the E-PASS program (very satisfied - 37%, satisfied - 54%).

Toll Road Usage

- 52% of cash users use toll roads for business-related reasons, compared to only 36% of E-PASS users.
- Almost half of E-PASS users, 47.3%, make less than five trips per week on the toll roads. For cash users, the figure is 32%. This is an indication of residents' awareness of the advantages of the toll roads for non-business-related uses.
- E-PASS users overwhelmingly recognize the positive characteristics of the toll roads regarding speed, cleanliness, maintenance, safety, landscaping and signage by stating that the toll roads are: faster roads (strongly agree - 53%, agree - 42%); cleaner roads (strongly agree - 39%, agree - 45%); well maintained roads (strongly agree - 38%, agree - 50%); safer roads (strongly agree - 30%, agree - 39%); having adequate landscaping (strongly agree - 36%, agree - 50%), and having adequate signage (strongly agree - 36%, agree - 55%).
- The majority (67%) of E-PASS users expressed that the Road Rangers make travel on the toll roads safer, while 64% said law enforcement patrols make travel safer.

59% of cash users feel travel on the toll roads is safer due to the Road Rangers program and 63% said law enforcement patrols make travel safer.

- There does, however, seem to be a lack of public knowledge about both programs. 28% of E-PASS users stated not knowing/can't say on the Road Rangers and 22% on the law enforcement patrols. For cash users, these figures are 37% and 24%, respectively.
- A majority of E-PASS users (52%) are familiar with the discount offered for using the toll roads 40 or more times on a monthly basis; however, 39% don't know about it. For cash users, 25% are aware of the discount offered, while 66% don't know about it.
- 51% of cash users have avoided using the toll roads, of which 65% expressed their main reason for avoiding the toll roads is to save money, while 9% said it is because of long waits at the toll booths and 11% because of too much traffic.
- The survey included a list of reasons for not getting E-PASS. The distribution of responses is as follows (greater than 100% due to rounding):

Prefer to pay cash	13%
Too much trouble	7%
Don't use the toll road too much	22%
Expensive	19%
Don't mind waiting to pay	5%
Don't want anyone to have record of travels	6%
Can't get a receipt	8%
Other	16%
No answer	6%

Expressway Navigator

- 82% of E-PASS users acknowledge receiving the Expressway Navigator, of which 74% feel it is useful (strongly agree - 14%, agree - 60%). Over half of the recipients (55%) would like to continue receiving it by mail, while 24% would prefer receiving it electronically and 10% is not interested in receiving it at all.

E-PASS Services

- A majority of E-PASS users (68%) have contacted the Service Centers. The responses about the service received from a Service Center are generally positive (very satisfied - 24%, satisfied - 52%, dissatisfied - 8%, very dissatisfied - 3%).
- 88% of E-PASS users are aware that from time to time they need to change the battery in the transponder and update their address and license plate information. Users are generally aware that they can receive a free transponder battery when needed (78% stated they knew about it, while 18% said they did not).

- A large percentage of cash users (64%) have heard advertising for the OOCEA or E-PASS. The distribution of the advertising source is as follows: television - 37%, newspaper/magazine - 20%, toll booths - 34%, and Internet - 6%.
- Most cash users (60%) do not know they can use E-PASS to pay for parking at the Orlando airport. This benefit is not enough to convince them to convert to E-PASS, as indicated by 57% of this population.
- Most cash users (69%) would consider getting E-PASS if offered a discount on tolls. The majority (66%) are not aware that they receive a discount if they pay over 40 tolls in a month. However, a majority of cash users (57%) indicated no interest in E-PASS.
- The possibility of receiving free transponders is an enticement for the majority of cash users (64%). At the same time, 39% responded that there are steps the OOCEA can take to encourage cash users to use E-PASS, as referenced in the customer comments.

Road Funding

- A majority of E-PASS users (56%) are unwilling to pay higher tolls, while 26% are, if it will lead to less congestion and traffic delays.
- For funding new roads, E-PASS users chose paying tolls (44.7%) over raising taxes (22.9%), while 26.5% chose not to make a decision over their funding preference. Cash users prefer paying tolls (46.7%) versus raising taxes (14.7%).

1.3 USER COMMENTS

This report includes an Exhibit related to the numerous comments taken from the survey respondents. Exhibit 7 is a grouping of comments, which JRD believes may warrant further research by the OOCEA. The following are some of the suggestions made by survey respondents that stood out as concerns for users.

Toll Plazas

- Review the working schedule of the attendants to ensure that during rush hours all toll booths are attended.

Transponders

- Consider the use of a single transponder to a multi-car family as long as all cars are part of the same account.

Traffic Safety/Efficiency

- Create traffic information signs to warn drivers of upcoming traffic problems.
- Increase the number of E-PASS lanes, where physically possible, to facilitate traffic at toll plazas.

Toll Costs

- Review the toll cost structure and its frequency on the toll roads.
- There is a widely extended perception that the tolls are too high and that their locations are too close one to each other. It would be convenient if it can be shown that the costs are reasonable and within standards.
- Consider the possibility of a different type of discount based on a scale of number of toll uses or type of user, i.e. senior citizens.
- Consider the creation of monthly passes with unlimited uses.
- Consider the indexing of toll costs to CPI.

Citations and Fines

- Review the current procedures to impose citations and fines for drivers who appear to have gone through tolls without paying.
- Consider the development of systems to debit any payment due amount directly from the account to those customers who pay in advance by credit card.

E-PASS Accounting System

- Review system inability to allow transactions (i.e. add funds by phone) on a 24/7 basis.
- Review system inability to provide account balances on a real-time basis.
- Review web-site design degree of user-friendliness.
- Consider accepting credit card payments at cash booths.

Toll Booth Attendants' Attitude

- Review attitude, courtesy and friendliness of booth attendants.

Construction

- Consider posting construction information on the web page.

Service Centers

- Consider having Service Centers working on a 24/7 basis.
- Review attitude, courtesy and training of service center representatives.

2 METHODOLOGY

In order to properly assess customers' perceptions, a sound methodology was developed to ensure that sufficient data was collected via customer surveys. This chapter describes the methodology utilized to develop the findings and recommendations presented in this report.

2.1 SURVEY PARTICIPATION

Surveys were conducted as follows:

1. 30,000 E-PASS users received the survey via mail.
2. 5,000 cash users received the survey, provided by OOCEA staff/contractors, at toll booths.
3. 1,000 phone surveys were conducted.
4. Web-based surveys were posted on the OOCEA website.

2.2 DEVELOPMENT OF SURVEY INSTRUMENTS

Three different survey questionnaires were developed in English and Spanish. The first questionnaire (Exhibits 1 and 2) was created for E-PASS users. This questionnaire was oriented toward determining the customers' perceptions regarding overall satisfaction with the E-PASS program, satisfaction with the Expressway Navigator newsletter, E-PASS Service Centers, E-PASS services, and toll road funding. Additional questions regarding toll road usage and demographics were included.

The second survey questionnaire (Exhibits 3 and 4) was created for cash users. This questionnaire was oriented toward determining these customers' perceptions regarding the advertising for the E-PASS, E-PASS services, primary reasons for not using E-PASS, and road funding. Additional questions regarding toll road usage and demographics were included. In addition, customers who responded to this questionnaire were requested to provide their contact information if they wished to receive a free E-PASS transponder.

The third survey questionnaire (Exhibits 5 and 6) was created for non-users of OOCEA toll roads. This questionnaire was oriented toward determining perceptions regarding the advertising for the E-PASS, primary reasons for not using the toll road system, and road funding. Additional questions regarding toll road usage and demographics were included. Respondents to this questionnaire were requested to provide their contact information if they wished to receive a free E-PASS transponder.

2.3 DATA COLLECTION AND RESPONSES

2.3.1 E-PASS USER SURVEYS

As previously mentioned, 30,000 surveys were mailed to E-PASS users. JRD randomly selected these names from OOCEA's E-PASS customer database by using the random function in Excel. This database consisted of 300,000 names. Once the names were selected, JRD sent the list to AXIS, OOCEA's vendor, which labeled the envelopes, printed out the E-PASS surveys, and mailed them. The completed surveys were returned to OOCEA, which forwarded them to JRD on a weekly basis. Table 2 depicts the total number of E-PASS user surveys received via mail, phone and online (see Table 1).

Table 2
Total Number of E-PASS User Surveys Received

Language	Number of Surveys Received
English	6,798
Spanish	145
Total	6,943

2.3.2 CASH USER SURVEYS

Additionally, 5,000 cash user surveys were distributed based on traffic concentration via the toll booth operators, six hours per day, for five days. The operators distributed the surveys per the methodology depicted in Table 3.

Table 3
Cash User Survey Distribution Methodology

Toll Plaza	Users (Millions)	%	Total Surveys	Surveys per hour (assumes 6 hours)	Surveys per day (assumes 5 days)
Conway	38	16.17%	809	27	162
Pine Hills	25	10.64%	532	18	106
Airport	21	8.94%	447	15	89
John Young	18	7.66%	383	13	77
Boggy Creek	15	6.38%	319	11	64
Bee Line Main	12	5.11%	255	9	51
University	25	10.64%	532	18	106
Curry Ford	21	8.94%	447	15	89
Dean	20	8.51%	426	14	85
Hiwassee	20	8.51%	426	14	85
Forest Lake	11	4.68%	234	8	47
Independence	9	3.83%	191	6	38
Total	235	100.00%	5,000	167	1,000

Table 4 depicts the total number of cash user surveys received via mail, phone and online (see Table 1).

Table 4
Total Number of Cash User Surveys Received

Language	Number of Surveys Received
English	299
Spanish	17
Total	316

2.3.3 PHONE SURVEYS

The project team conducted 1,000 telephone surveys, with the intention of capturing non-users of the toll roads. The phone calls were conducted in English and Spanish (where necessary) from 5:30 pm to 8:00 pm on the following dates:

- July 2, 2008
- July 3, 2008
- July 7, 2008
- July 8, 2008
- July 9, 2008

The names were randomly selected from an Orlando white pages telephone book. Table 5 depicts the distribution of phone calls and responses.

Table 5
Distribution of Phone Calls and Responses

Ineligible Phone Calls	Total Number	Percentage
Business or Government office	6	0.6%
Disconnected, fax, no service, busy tone	274	27.4%
No answer	287	28.7%
No eligible respondent	15	1.5%
No dial tone	1	0.1%
Potentially Eligible Calls		
Answering Machine	192	19.8%
Refused to Participate	87	8.7%
Incomplete (Early Termination)	9	0.9%
Not Available	76	7.6%
Language Barrier	0	0.0%
Complete	53	5.3%
Total	1,000	100%

2.3.4 ONLINE SURVEYS

JRD also conducted surveys online. The JRD team posted the E-PASS and cash user surveys online via the online surveying tool "Survey Monkey." Via the cover letter

attached to the surveys (Exhibit 8), customers were informed they could conduct the survey online by accessing the link provided on OOCEA's website. JRD downloaded the online survey results into an Excel spreadsheet for analysis. Table 6 depicts the total number of online surveys received.

Table 6
Number of Online Surveys Received

Type of Survey	Number of Online Surveys Received
E-PASS English	276*
E-PASS Spanish	4*
Cash User English	14*
Cash User Spanish	1*
Total	295

*Note: These numbers are included in the total numbers of Table 2 and Table 4, respectively.

2.4 DATA ANALYSIS

As JRD began receiving surveys from OOCEA, the team began processing the surveys. This included:

- Opening the surveys.
- Sorting the surveys by type and language.
- Numbering and coding the surveys.

Each survey was labeled with a number and letter to represent how it was received. The significance of this coding is that it enables the team to go back to a specific survey, if any questions arise. The coding consisted of the following:

- M for mail
- P for phone
- O for online
- S for Spanish

As the numbering and coding process was taking place, the JRD team began entering the response to each survey question into Excel spreadsheets. Simultaneous to the data entry, team members were conducting quality control on the data entry. Ten percent (10%) of all surveys entered were sampled for quality. Once the quality control was completed, the project team began the data analysis. This consisted of:

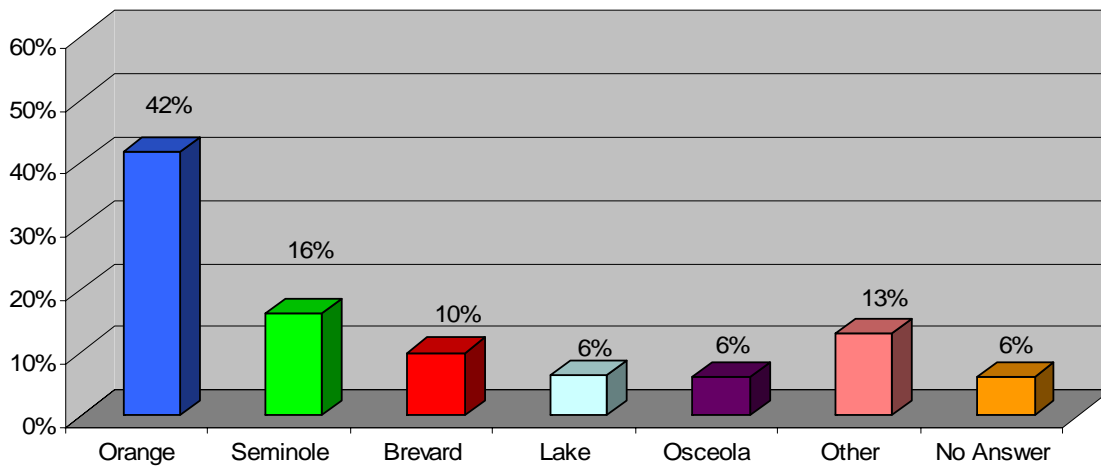
- Formulating the spreadsheets to find totals corresponding to each question in the survey.
- Developing graphs depicting the results.

3 SURVEY RESULTS

3.1 CUSTOMER DEMOGRAPHICS

JRD performed customer surveys and focus groups to gather customers' perceptions regarding the overall satisfaction with the E-PASS program, satisfaction with the Expressway Navigator newsletter, E-PASS Service Centers, E-PASS services, road funding and overall satisfaction. A total of 7,261 surveys were analyzed resulting in the figures represented throughout this report. Figure 1 illustrates that 42% of customers surveyed live in Orange County.

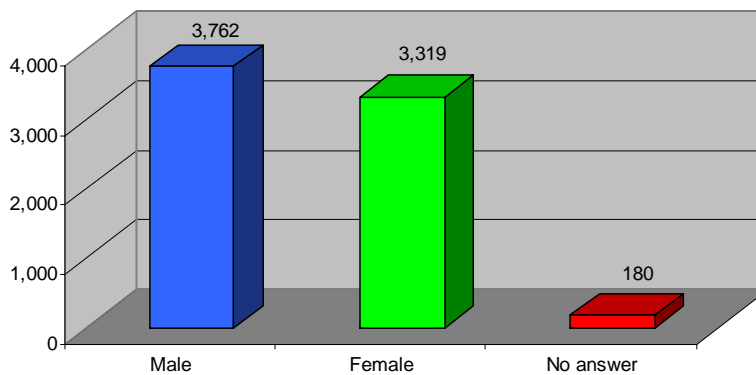
Figure 1
In which county do you live?



Source: JRD & Associates Customer Surveys
Note: Percentages may not add up to 100 due to rounding.

Figure 2 illustrates that 52% of the customers surveyed were male, 46% were female, and the remaining 2% did not respond.

Figure 2
What is your gender?

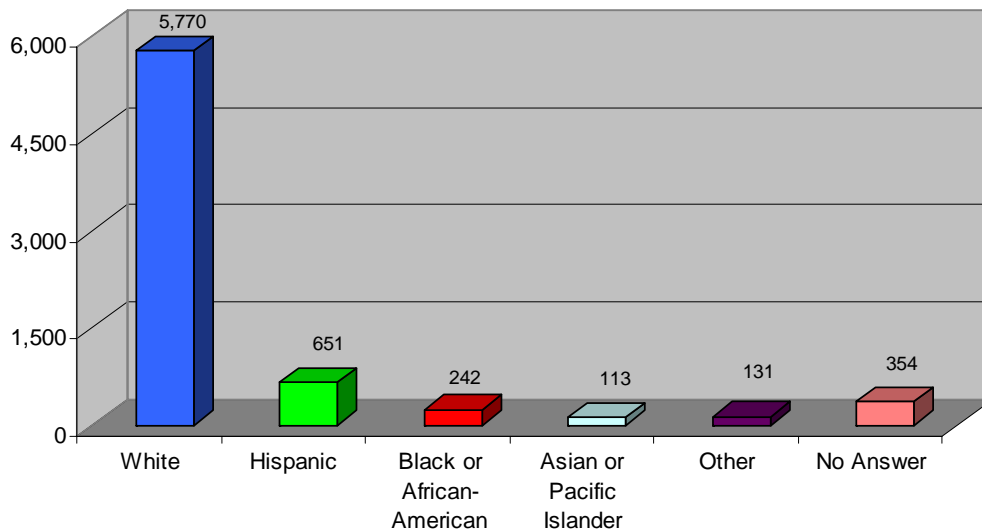


Source: JRD & Associates Customer Surveys

Figure 3 depicts customer racial/ethnic backgrounds. It demonstrates that 80% of the customers surveyed were white, while 13% classified themselves as Hispanic, Black or African-American, Asian or Pacific Islander. However, 2% of customers classified their racial/ethnic background as Other and 5% did not respond.

Figure 3

What is your racial/ethnic background?

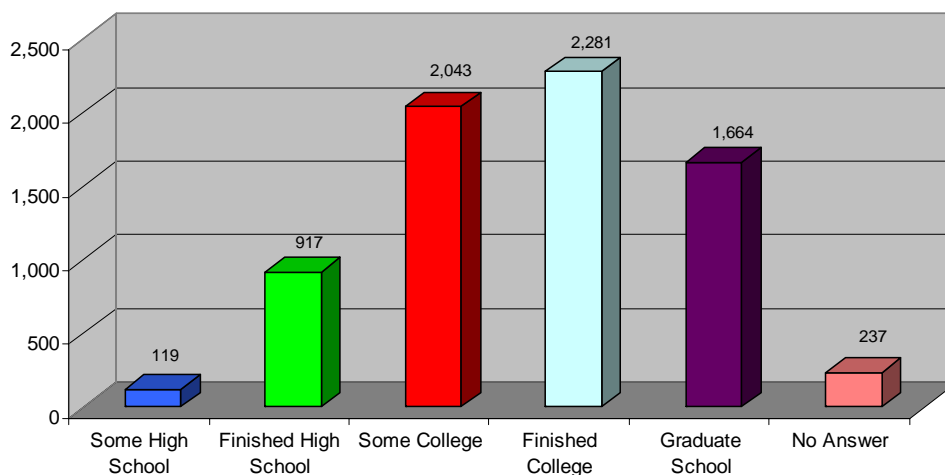


Source: JRD & Associates Customer Surveys

82% of OOCEA customers have a minimum of some level of college education as depicted in Figure 4. As clearly illustrated in the figure, 28% of customers surveyed have completed some level of college education, while 31% have finished college, and 23% have completed graduate school.

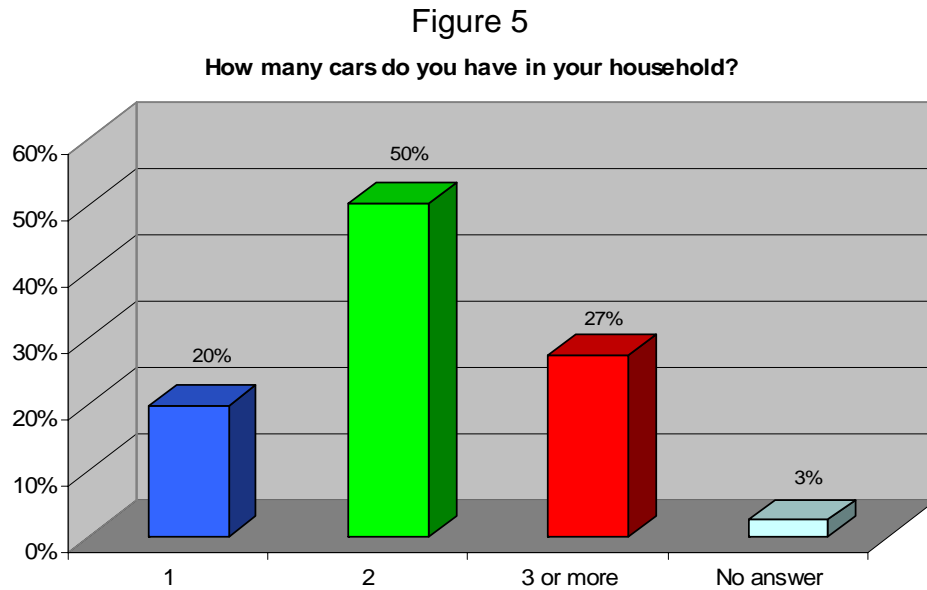
Figure 4

What is your education level?



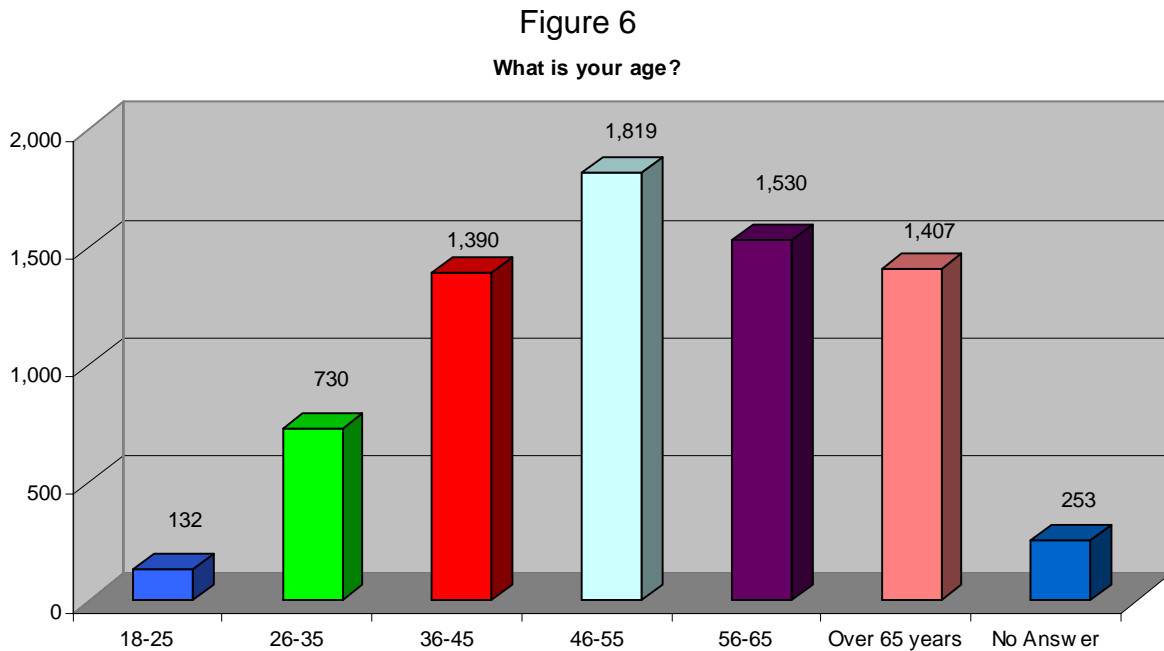
Source: JRD & Associates Customer Surveys

As depicted in Figure 5, 50% of customers surveyed have two cars in their household.



Source: JRD & Associates Customer Surveys

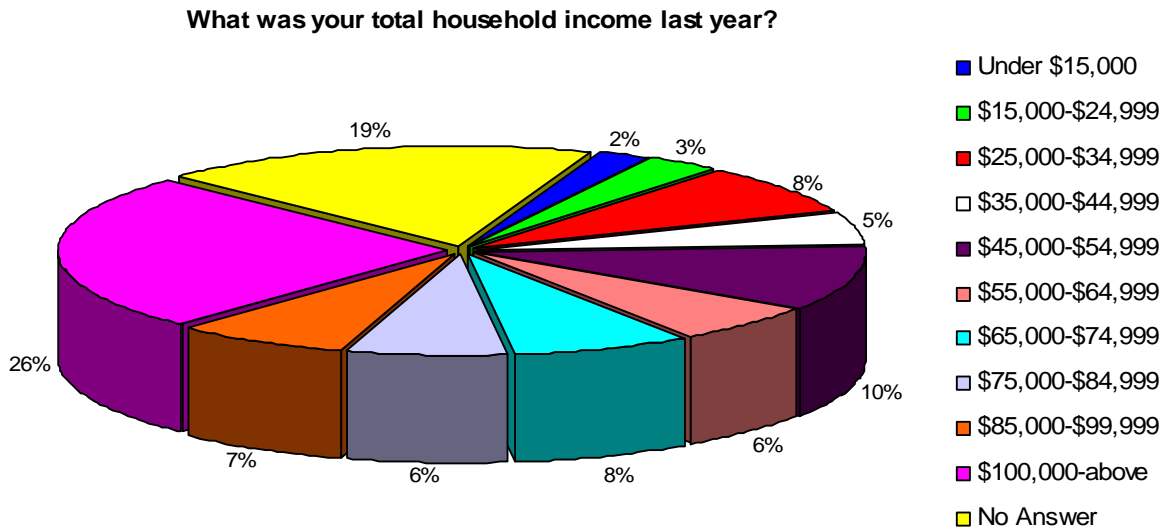
Figure 6 demonstrates that the majority number of customers surveyed for this study are between the ages of 36 and 65, with the highest percentages of customers (25%) belonging to the 46–55 age group.



Source: JRD & Associates Customer Surveys

As illustrated in Figure 7, the household incomes of toll users vary. The greatest percentage of users surveyed (26%) had a total household income of \$100,000 or higher last year.

Figure 7



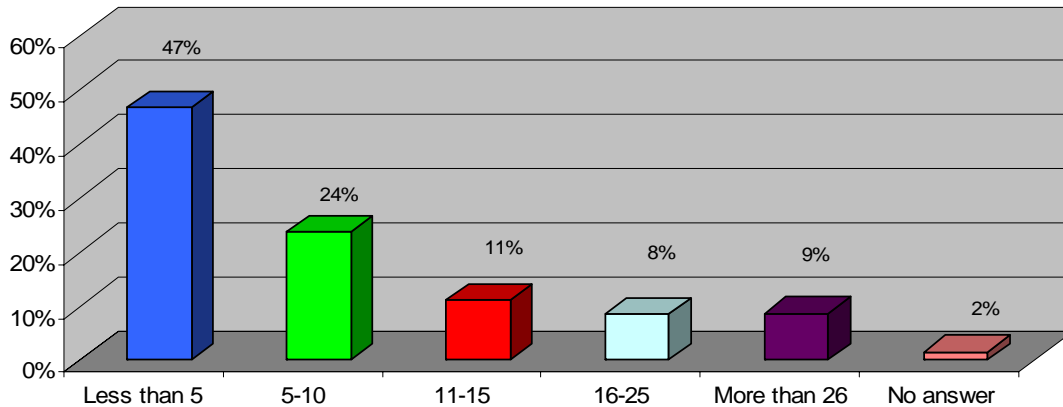
Source: JRD & Associates Customer Surveys

3.2 OVERALL SURVEY RESULTS

Figure 8 depicts the total number of tolls paid in an average week. The majority of the customers surveyed pay less than five tolls per week. Only 9% of the residents pay more than 26 tolls in an average week.

Figure 8

How many tolls do you pay in an average week?

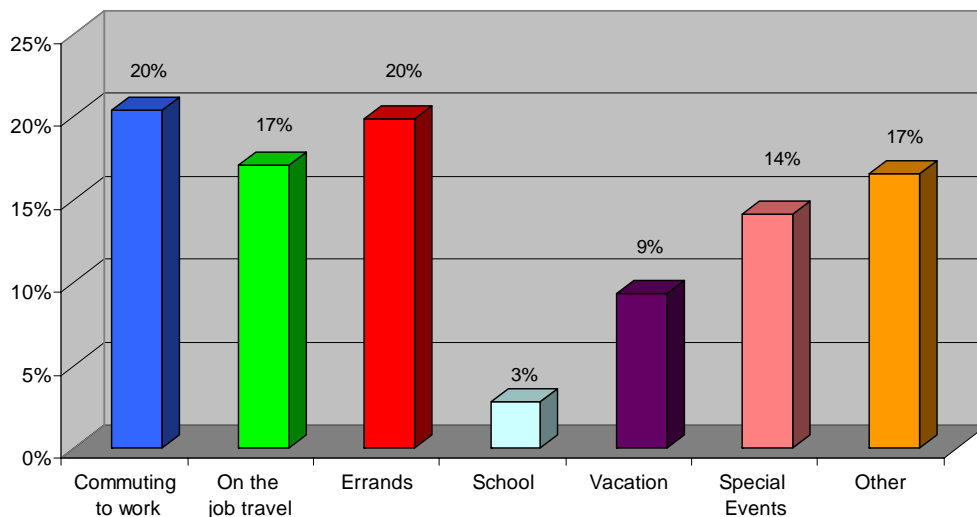


Source: JRD & Associates Customer Surveys
Note: Percentages may not add up to 100 due to rounding.

There are three main reasons why customers use the expressway system, to commute to work, run errands and on the job travel. The expressway system is less often used for vacation or for school. Figure 9 illustrates these uses.

Figure 9

For what purposes do you normally use the expressway system?

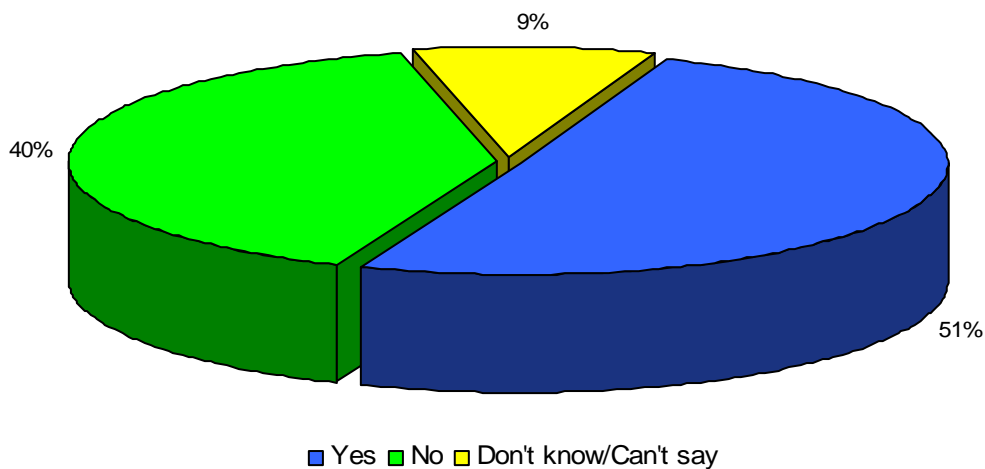


Source: JRD & Associates Customer Surveys

Figure 10 depicts that 40% of all the customers surveyed are not aware that they could receive a discount on tolls if they paid more than 40 tolls per month.

Figure 10

Are you aware that E-PASS customers receive a discount on tolls if they pay tolls more than 40 times per month?



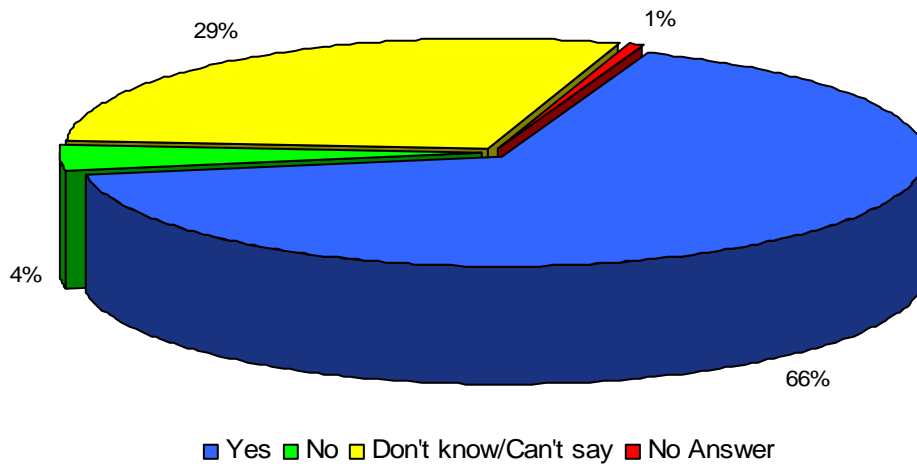
Source: JRD & Associates Customer Surveys

As shown in Figure 11, 66% of customers surveyed felt that Road Rangers make travel on the expressway safer. The following are some positive comments expressed by the customers surveyed:

- I like knowing the Road Rangers are there. Please do not let them be taken away.
- As someone who has broken down several times, I would like to express my appreciation for the Road Rangers. They stopped and checked over my vehicle, offered me water, made sure I was alright and stayed with me until a tow truck arrived. I truly feel safer on the road because of the Road Rangers.
- I think the Road Rangers are wonderful and always so helpful in times of need.
- I would pay more tolls to keep the Road Rangers! They have helped me twice.
- Road Rangers are excellent.
- Road Rangers are Heroes! Keep them. One of the very best uses of taxpayer money. They are a vital part of road safety, very considerate, do all they can to assist people. They should be highly commended for the work they do! I vote to keep road rangers - lifesavers.
- Road Rangers provide excellent service and make travel safer.
- Road rangers are vital to the road system and safety. Please keep them.

Figure 11

Do you feel that Road Rangers make travel on the expressway safer?



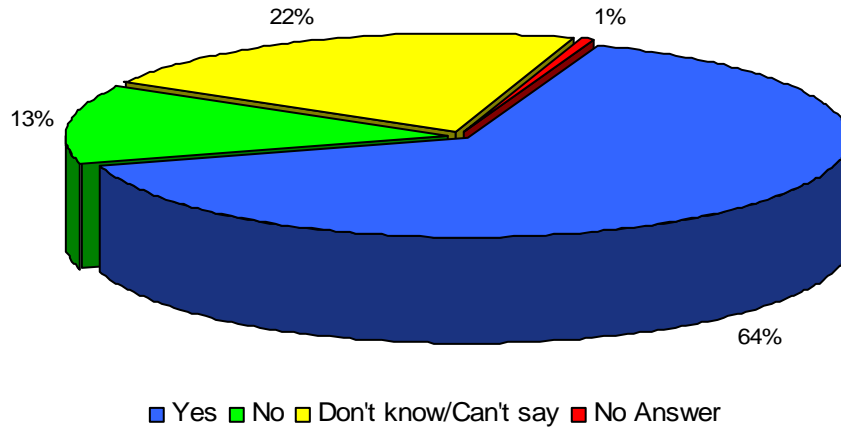
Source: JRD & Associates Customer Surveys

As shown in Figure 12, 64% of customers surveyed felt that patrols by law enforcement make travel on the expressway safer and that more are needed. The customers surveyed expressed the following comments:

- Need more law enforcement on Expressway.
- More patrol by law enforcement.
- Need more police to enforce speed limits!
- Not enough law enforcement.
- Would like to see more patrols.
- I feel so much safer on the expressway. There are not so many speeders who think they own the roadway! More police would not bother me, as I have a 13-year-old teen I would like to see grow up.

Figure 12

Do you feel that patrols by Law Enforcement make travel on the expressway safer?

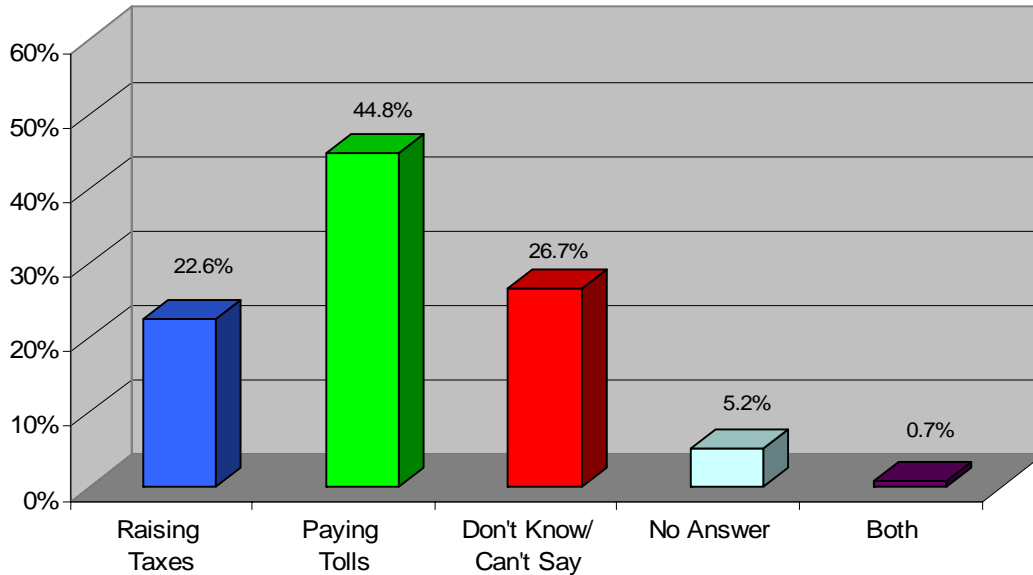


Source: JRD & Associates Customer Surveys

Figure 13 depicts that 45% of customers would rather fund new roads by paying tolls than by raising taxes. Less than one percent of the customers preferred both.

Figure 13

How would you prefer to fund new roads?



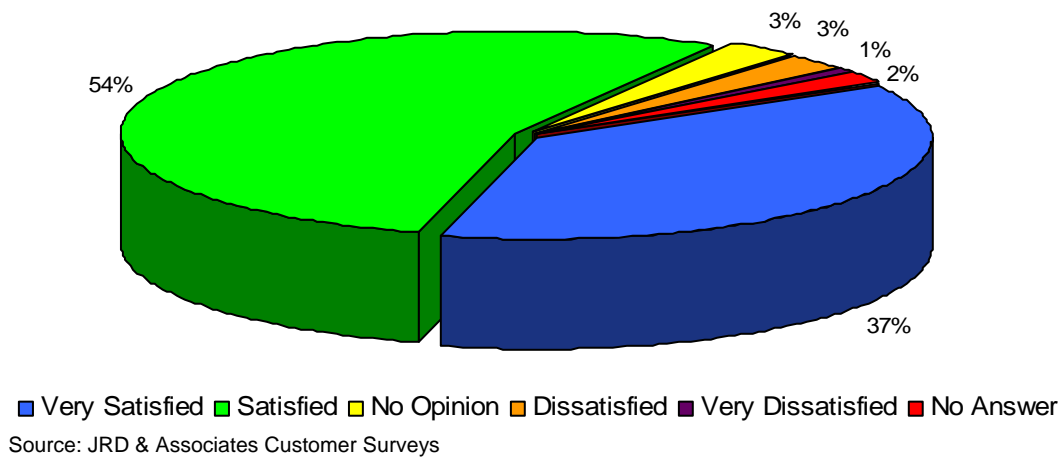
Source: JRD & Associates Customer Surveys

3.3 E-PASS USER SURVEY RESULTS

The survey demonstrated that the 91% of customers are satisfied or very satisfied with the E-PASS program. This is an indication of the success of the E-PASS program.

Figure 14

Overall, how satisfied are you with the E-PASS program?



As is clearly illustrated in Figure 15, 98.4% of customers have used the toll roads within the last six months. This is a good indication that OOCEA toll roads are a vital component of commuters' transportation made in the Orange County area.

Figure 15

Have you used the toll roads in the last 6 months?

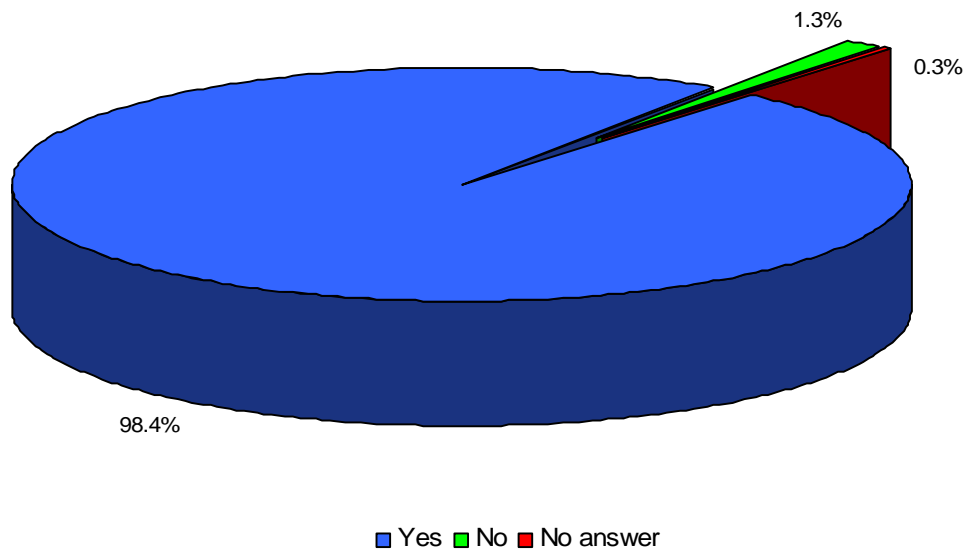
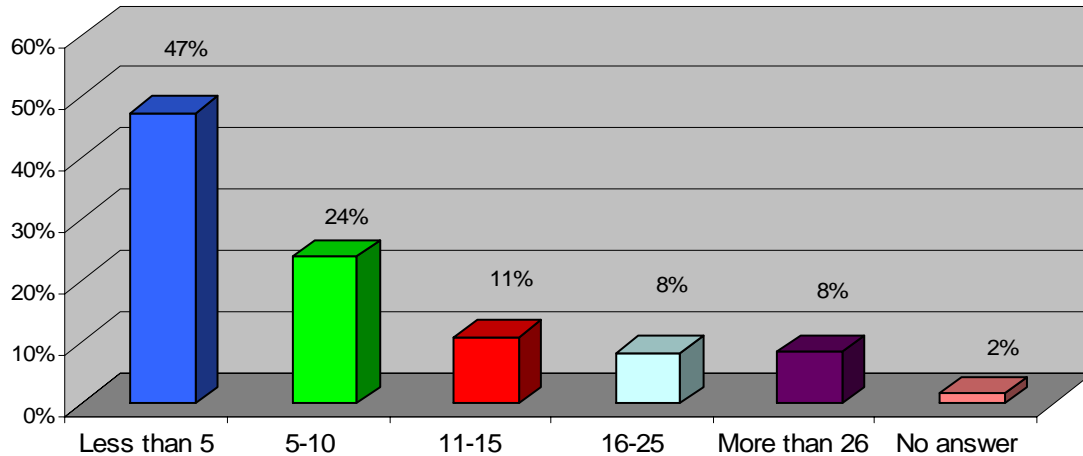


Figure 16 represents the total number of tolls paid in an average week. The majority of E-PASS users surveyed pay less than five tolls per week.

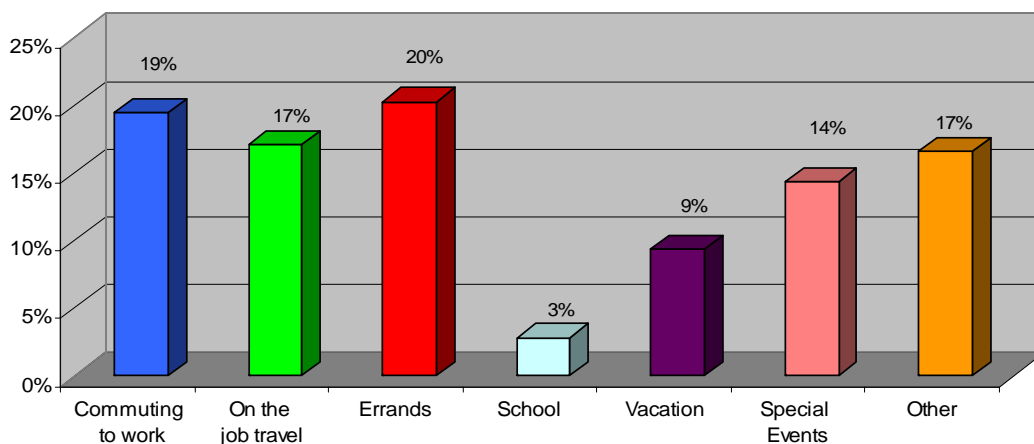
Figure 16
How many tolls do you pay in an average week?



Source: JRD & Associates Customer Surveys

As demonstrated in Figure 17, the majority of E-PASS customers use the expressway system to commute to work, run errands, on the job travel, and for other purposes. As clearly seen, 36% are business related, while the other 20% are used for errands due to the convenience of the toll road system.

Figure 17
For what purposes do you normally use the expressway system?



Source: JRD & Associates Customer Surveys
Note: Percentages may not add up to 100 due to rounding.

According to the survey, 95% of E-PASS users agree or strongly agree that toll roads are faster than non-toll roads (Figure 18). In addition, Figure 19 depicts that 84% of customers believe toll roads are cleaner than other roads, with 88% stating that they believe the toll roads are well maintained (Figure 20).

Figure 18

The toll roads are faster than other roads

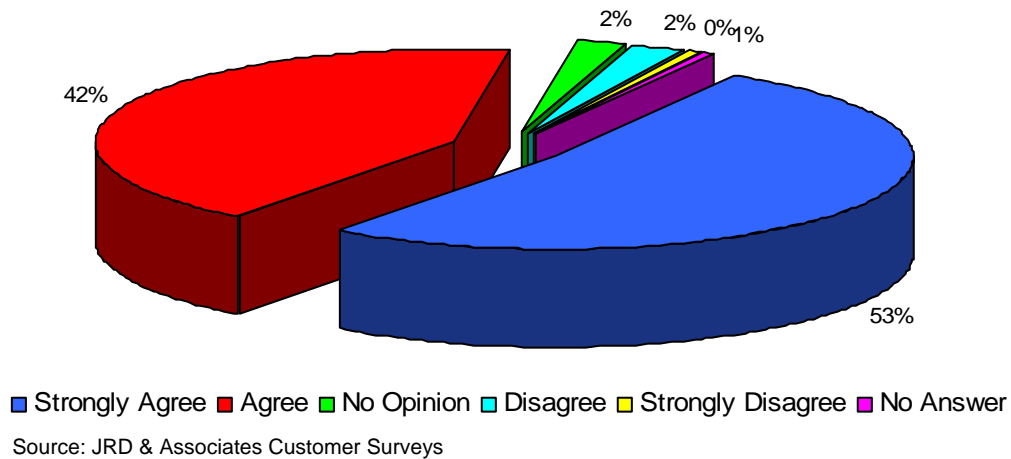


Figure 19

The toll roads are cleaner than other roads

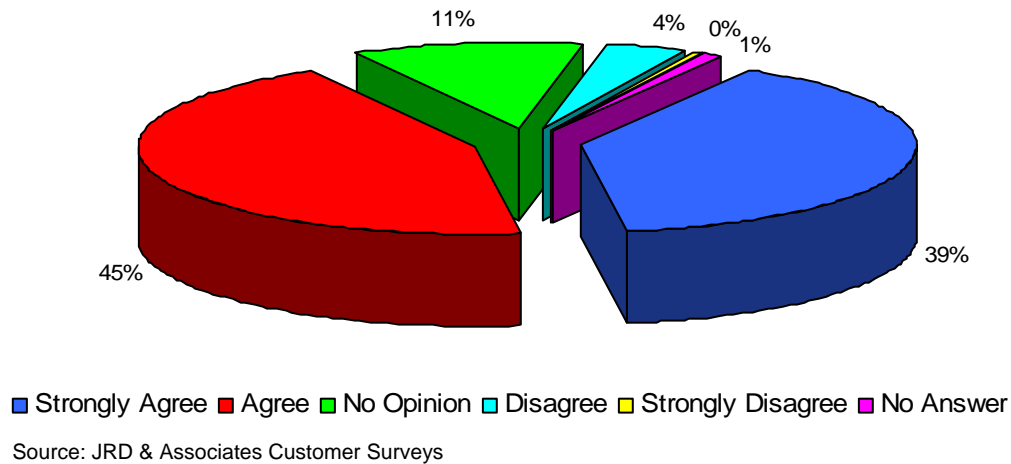
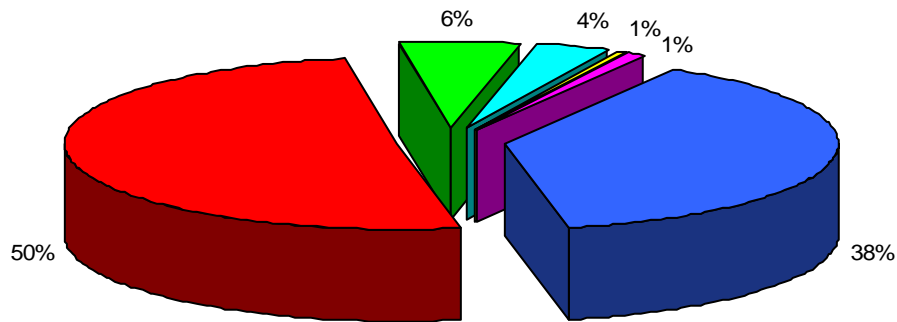


Figure 20

The toll roads are well maintained



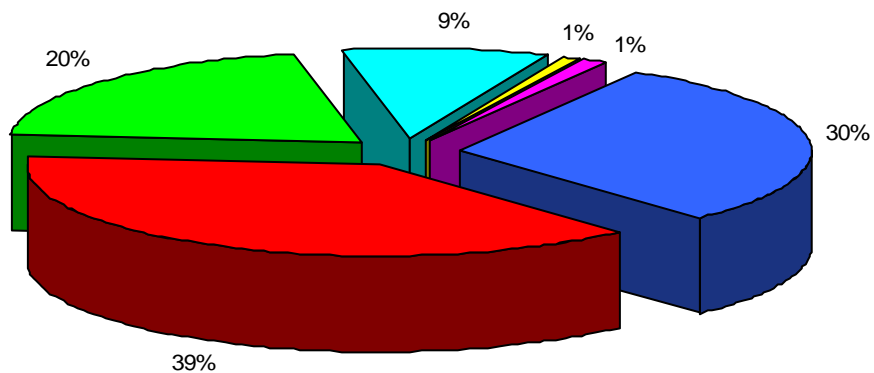
■ Strongly Agree ■ Agree ■ No Opinion ■ Disagree ■ Strongly Disagree ■ No Answer

Source: JRD & Associates Customer Surveys

As illustrated in Figure 21, 69% of E-PASS users feel safer using toll roads instead of non-toll roads.

Figure 21

The toll roads are safer to use



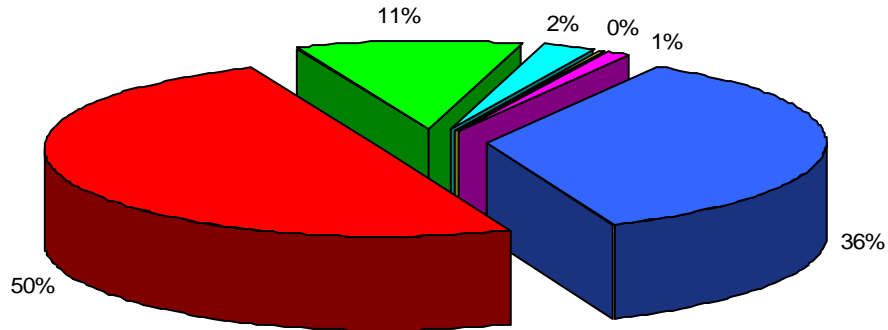
■ Strongly Agree ■ Agree ■ No Opinion ■ Disagree ■ Strongly Disagree ■ No Answer

Source: JRD & Associates Customer Surveys

Figure 22 reveals that most (86%) E-PASS users find toll roads to have adequate landscaping. In addition, as shown in Figure 23, 91% of customers agreed or strongly agreed that toll roads have adequate signage.

Figure 22

The toll roads have adequate landscaping

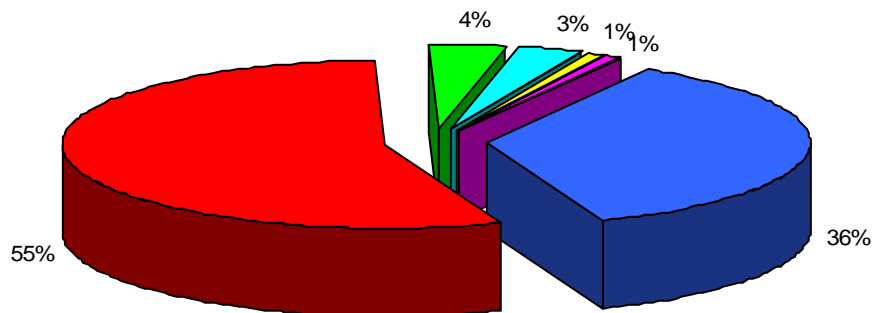


■ Strongly Agree ■ Agree ■ No Opinion ■ Disagree ■ Strongly Disagree ■ No Answer

Source: JRD & Associates Customer Surveys

Figure 23

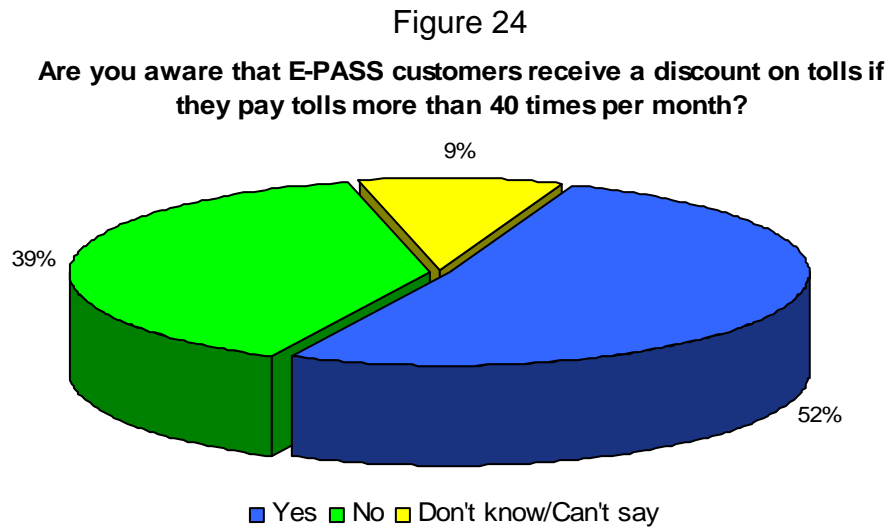
The toll roads have adequate signage



■ Strongly Agree ■ Agree ■ No Opinion ■ Disagree ■ Strongly Disagree ■ No Answer

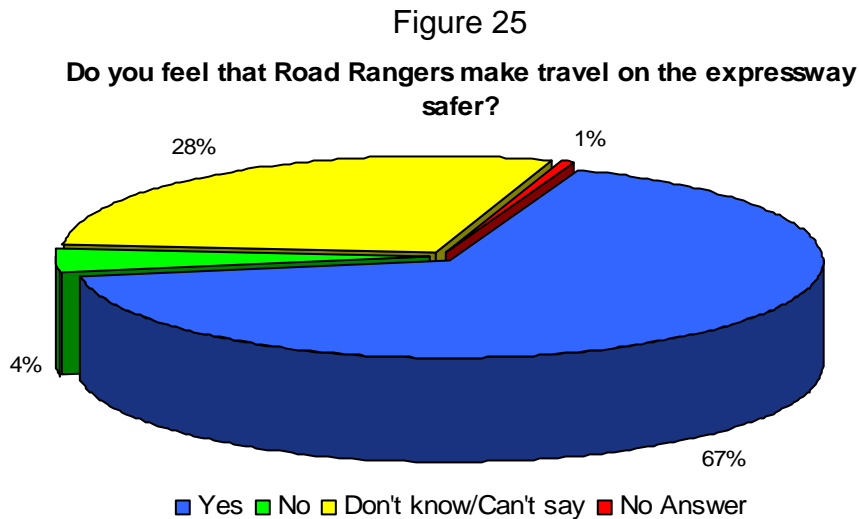
Source: JRD & Associates Customer Surveys

Figure 24 demonstrates that up to 52% of E-PASS users are aware that they can receive a discount.



Source: JRD & Associates Customer Surveys

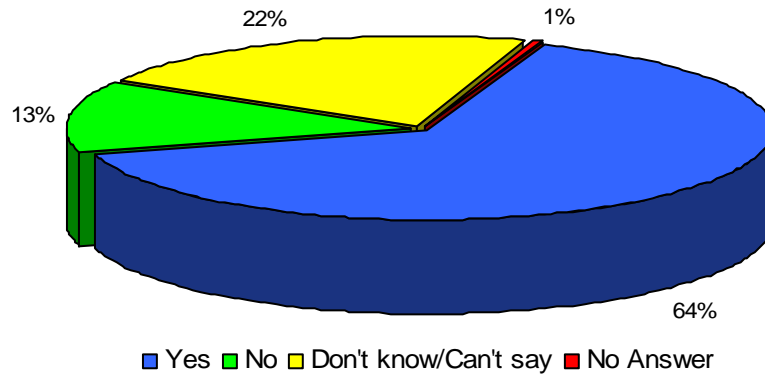
As previously stated, and as illustrated in Figure 25, 67% of E-PASS users believe travelling on the toll roads is safer when Road Rangers are present. Furthermore, 64% feel that law enforcement patrols also make travel safer as displayed in Figure 26.



Source: JRD & Associates Customer Survey

Figure 26

Do you feel that patrols by Law Enforcement make travel on the expressway safer?

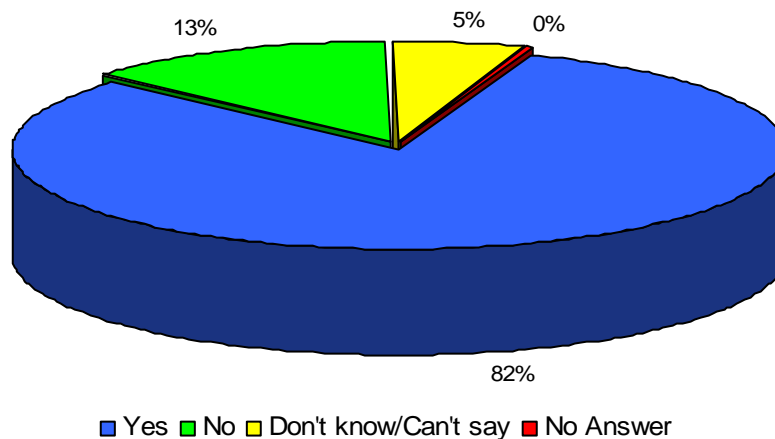


Source: JRD & Associates Customer Surveys

Figure 27 shows that 82% of E-PASS users receive the Expressway Navigator newsletter, while 13% claim they do not. As displayed in Figure 28, 79% of the 82% take the time to read it. Figure 29 illustrates that 74% of E-PASS customers who read the Expressway Navigator newsletter find the information it provides useful to them. Most of these customers (55%) prefer to receive the newsletter through the mail, while 24% stated that they would prefer receiving it through email, as demonstrated in Figure 30. In addition, 10% of the customers expressed their lack of interest in receiving the newsletter.

Figure 27

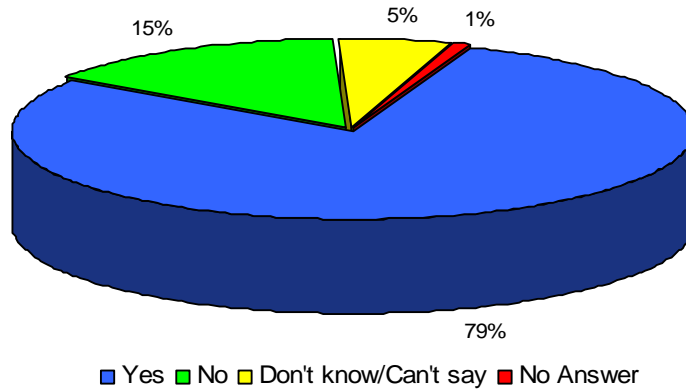
Have you received the Expressway Navigator newsletter?



Source: JRD & Associates Customer Surveys

Figure 28

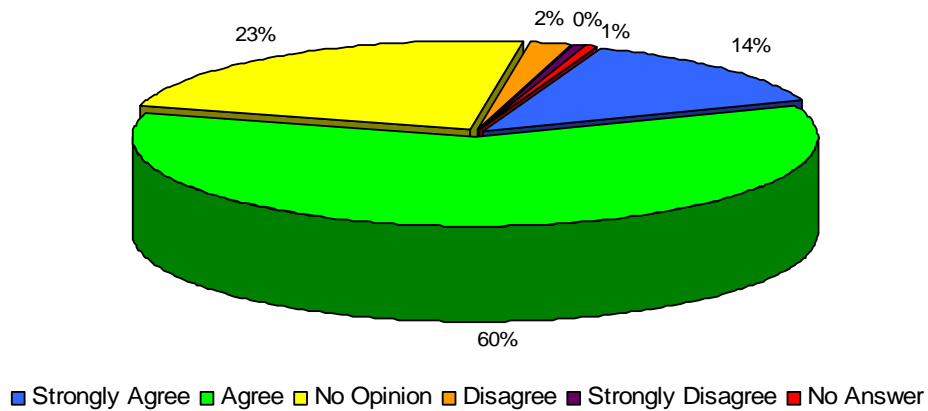
Did you read the Expressway Navigator newsletter



Source: JRD & Associates Customer Surveys

Figure 29

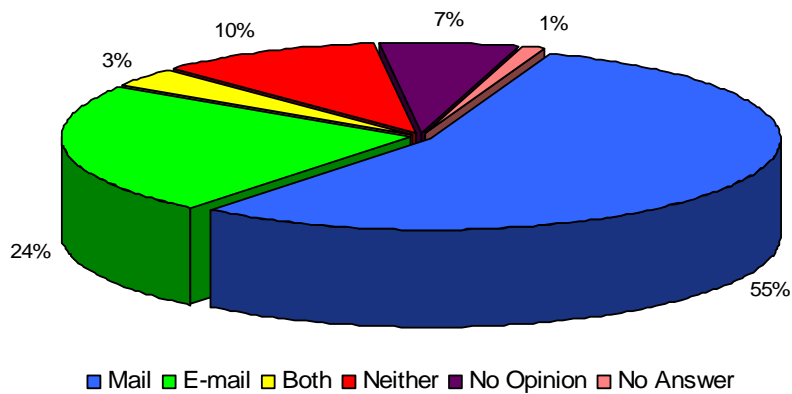
Was the information contained in the Expressway Navigator useful to you?



Source: JRD & Associates Customer Surveys

Figure 30

How would you prefer to receive the Expressway Navigator?

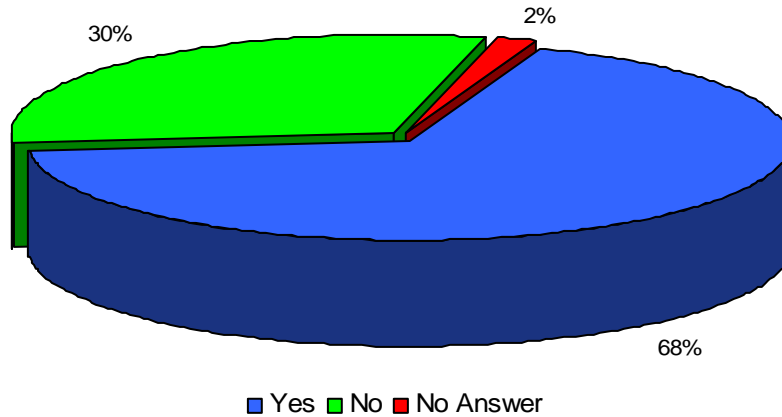


Source: JRD & Associates Customer Surveys

Per Figure 31, 68% of E-PASS users stated that they have contacted an E-PASS service center. Figure 32 illustrates that 76% of them were satisfied or very satisfied with their experience.

Figure 31

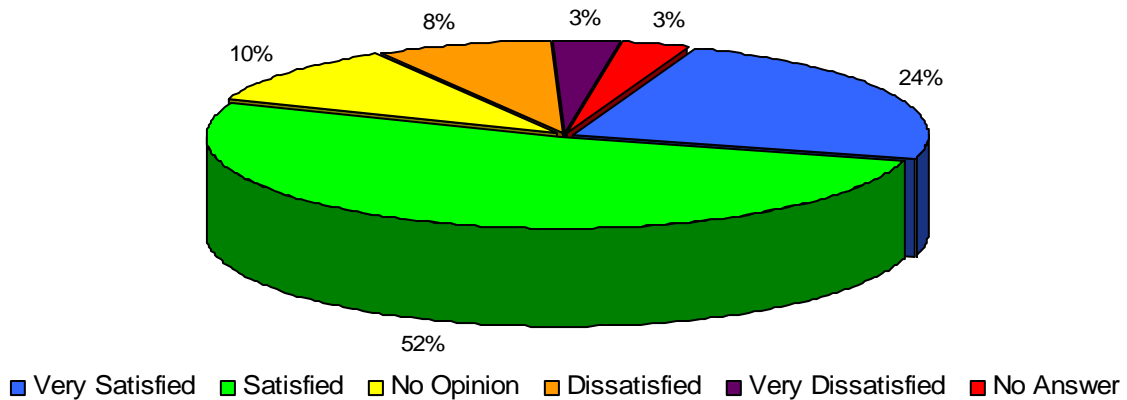
Have you ever called an E-PASS service center?



Source: JRD & Associates Customer Surveys

Figure 32

How satisfied are you with the service you received from an E-PASS Service Center?

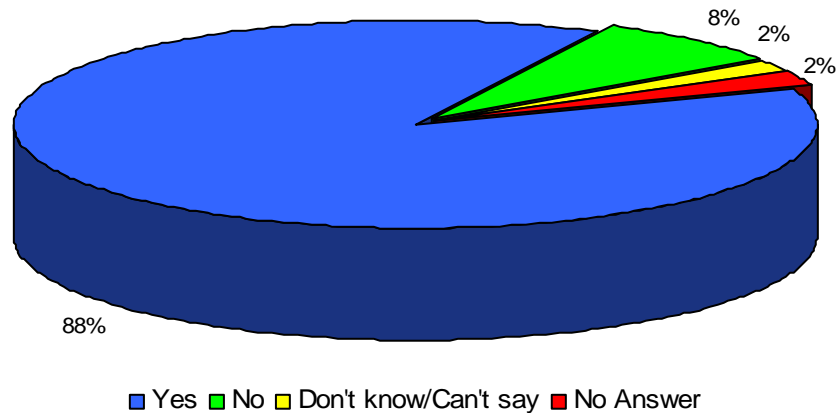


Source: JRD & Associates Customer Surveys

As shown in Figure 33, 88% of E-PASS users claim they know about transponder battery replacement as well as the need to update address and license plate information. In addition, Figure 34 illustrates that the majority (78%) of users are aware that they can replace their transponder battery free of charge.

Figure 33

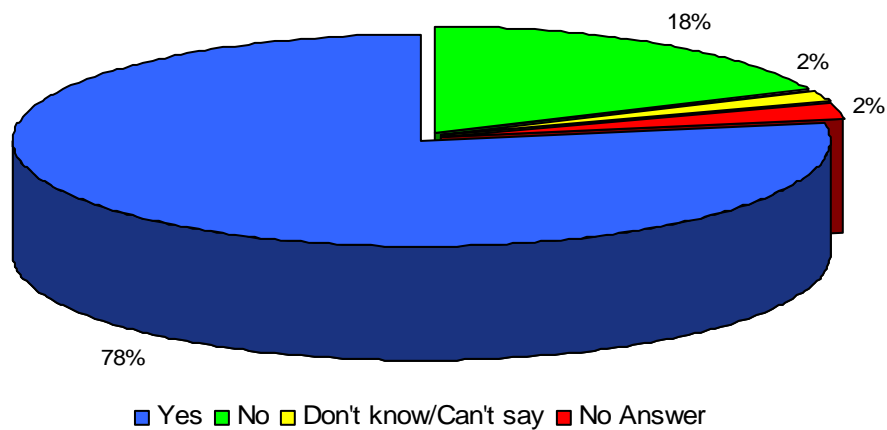
Are you aware that you need to replace the battery and update your address and license plate information in your E-PASS?



Source: JRD & Associates Customer Surveys

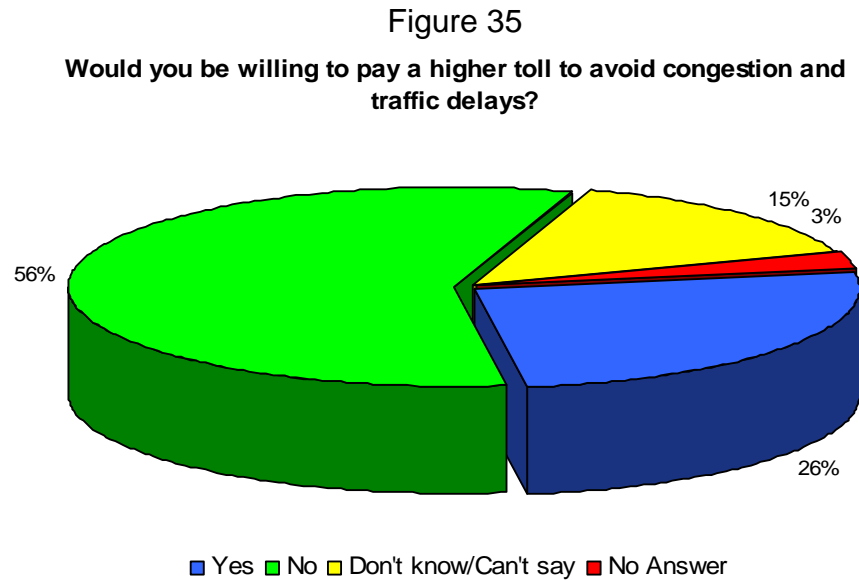
Figure 34

Are you aware that you can replace the battery in your E-PASS transponder for free?



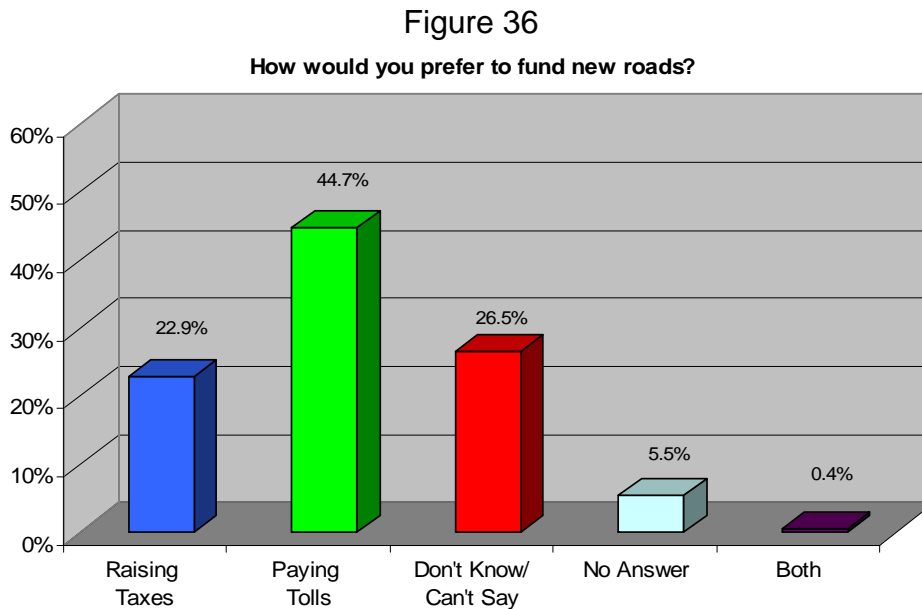
Source: JRD & Associates Customer Surveys

Figure 35 demonstrates that while E-PASS users value toll roads because they experience less traffic, only 26% are willing to pay a higher toll in an effort to avoid traffic.



Source: JRD & Associates Customer Surveys

E-PASS users were also asked how they would prefer to fund new roads. Figure 36 displays that 44.7% believe the best way to fund the construction of new roads is continuing to pay tolls; however 22.9% feel that raising taxes would be the preferred method. This distribution is also evident in customer comments. Although most seem willing to increase tolls or taxes, they express concerns with toll prices upon completion of road construction.



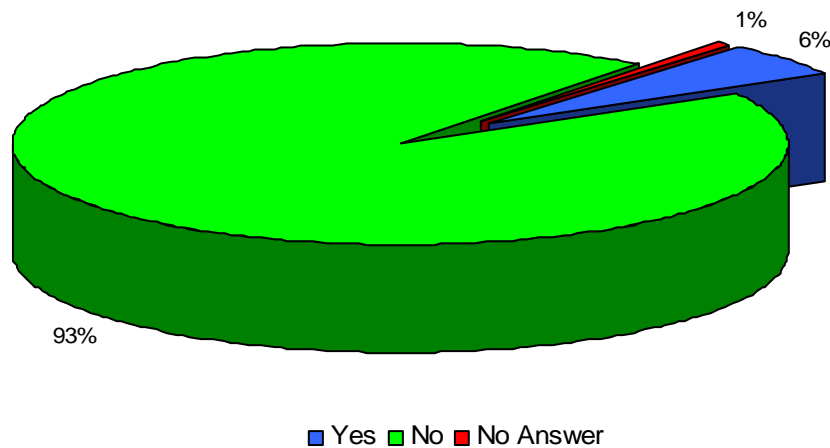
Source: JRD & Associates Customer Surveys

3.4 CASH USER SURVEY RESULTS

As depicted in Figure 37, 93% of cash users expressed that they do not have an E-PASS transponder in their vehicles, while 6% do. Based on customer comments, the 6% are E-PASS users who have experienced problems with the transponders and have decided to pay tolls with cash.

Figure 37

Do you have an E-PASS transponder in your car?

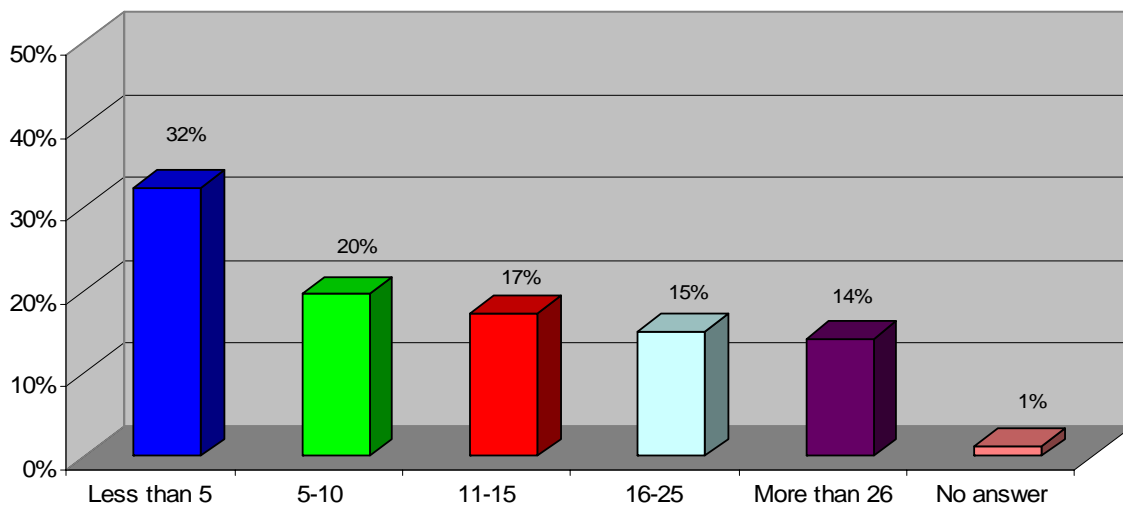


Source: JRD & Associates Customer Surveys

Figure 38 shows that 32% of cash users pay less than five tolls in an average week.

Figure 38

How many tolls do you pay in an average week?

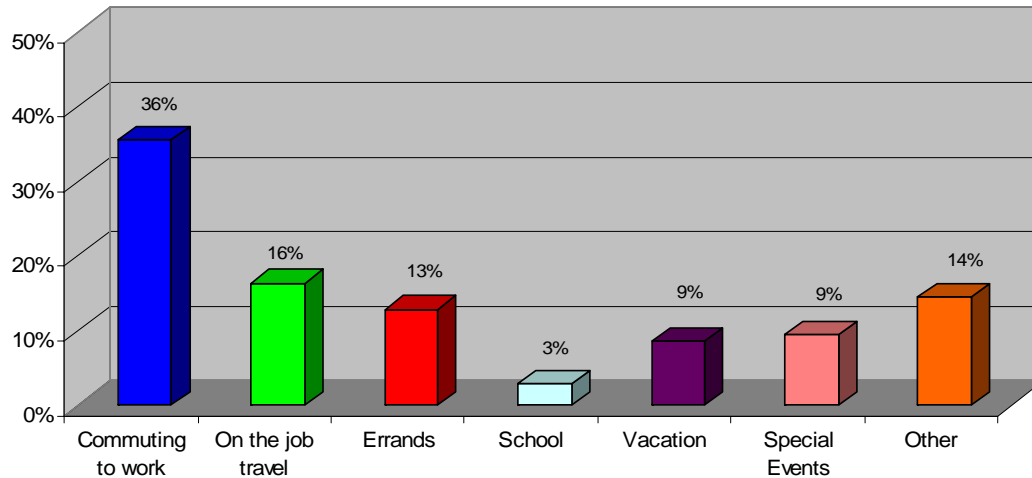


Source: JRD & Associates Customer Surveys
Note: Percentages may not add up to 100 due to rounding.

Figure 39 illustrates that 36% of cash users use the toll roads to commute to work. The roads are mostly used for business purposes (52% of the time). A minority of users use the roads to commute to school (3%).

Figure 39

For what purpose do you normally use the expressway system?

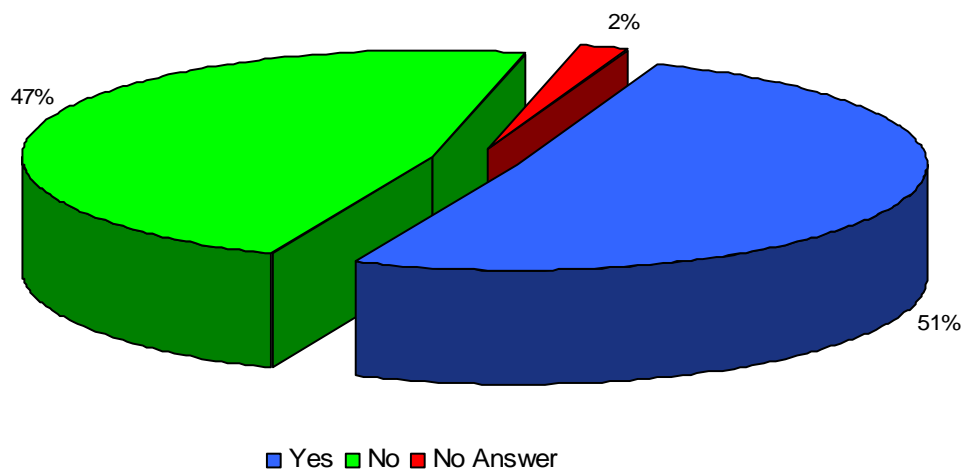


Source: JRD & Associates Customer Surveys

As depicted in Figures 40 and 41 below, 51% of the cash users have avoided using the toll roads in the last 3 months. Their reasons include too much traffic (11%) and long waits at the toll booth (9%). However, the highest percentage of customers (65%), responded that they avoid tolls in an effort to save money.

Figure 40

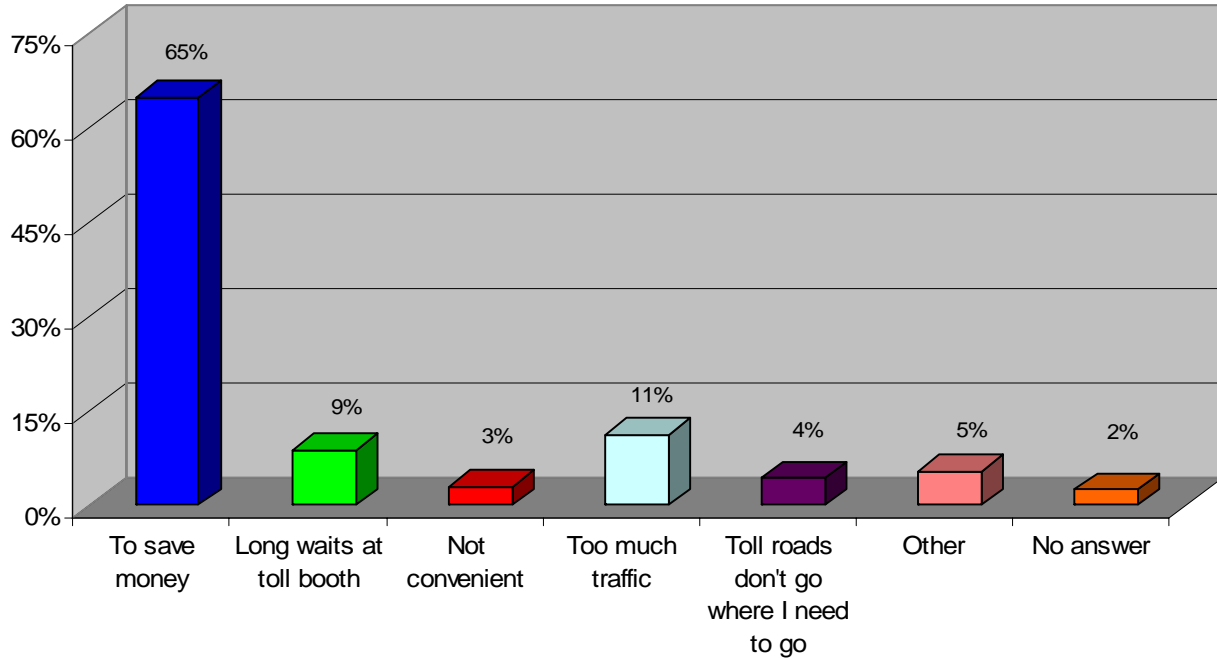
In the last 3 months, have you avoided using the toll roads?



Source: JRD & Associates Customer Surveys

Figure 41

Why did you avoid the tolls?

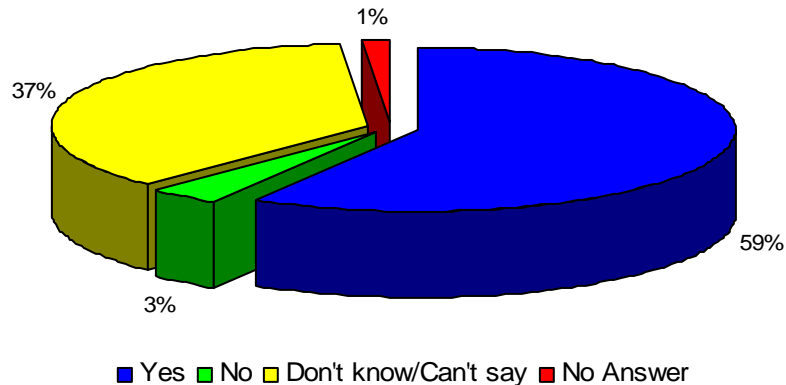


Source: JRD & Associates Customer Surveys
Note: Percentages may not add up to 100 due to rounding.

As shown in Figure 42, 59% of cash users feel that Road Rangers make travel on the toll roads safer. The remaining 41% feel otherwise. Many cash customers (37%) do not know about Road Rangers. This is in stark contrast to E-PASS users.

Figure 42

Do you feel that Road Rangers make travel on the expressway safer?

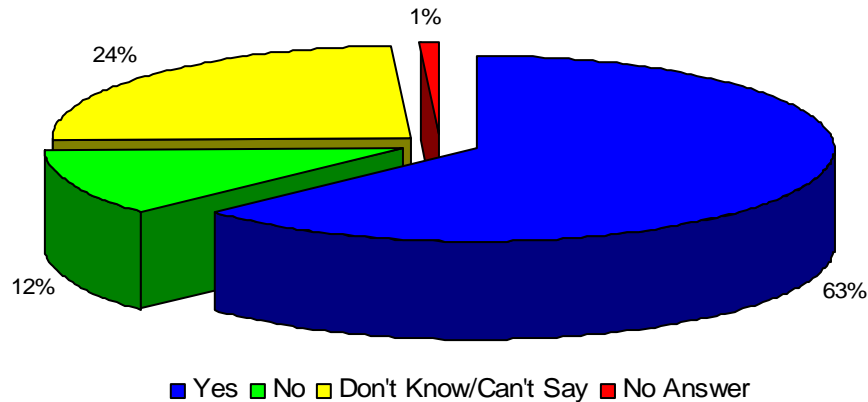


Source: JRD & Associates Customer Surveys

As shown in Figure 43, 63% of cash users feel that patrols by law enforcement make travel on the toll roads safer.

Figure 43

Do you feel that patrols by Law Enforcement make travel on the expressway safer?

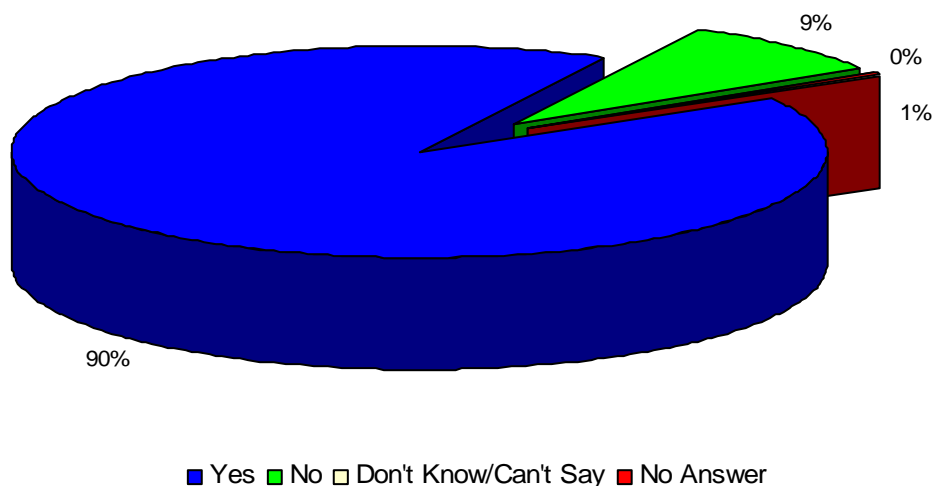


Source: JRD & Associates Customer Surveys

Figure 44 demonstrates that 90% of cash users surveyed had prior knowledge of the E-PASS electronic toll collection system before completing this survey. Figure 45 illustrates that of these customers, 64% have seen and/or heard advertising for OOCEA or E-PASS.

Figure 44

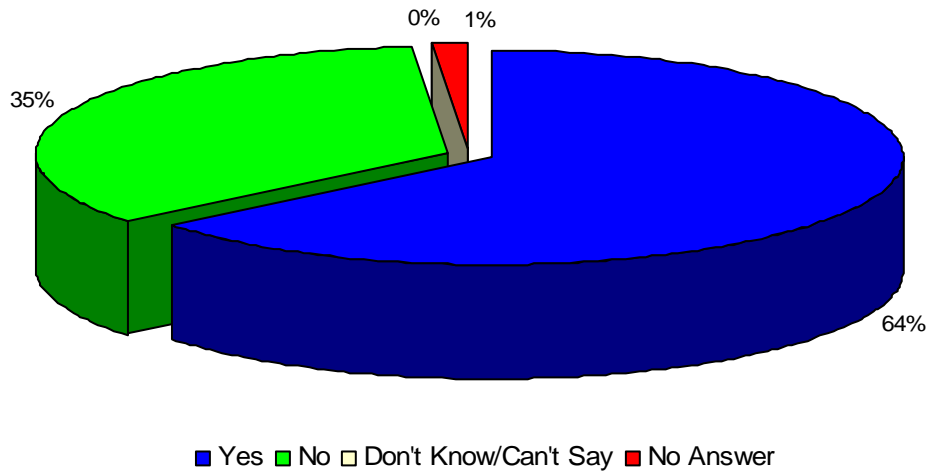
Have you heard about the E-PASS electronic toll collection system before today?



Source: JRD & Associates Customer Surveys

Figure 45

Have you seen or heard any advertising for the Expressway Authority or E-PASS?

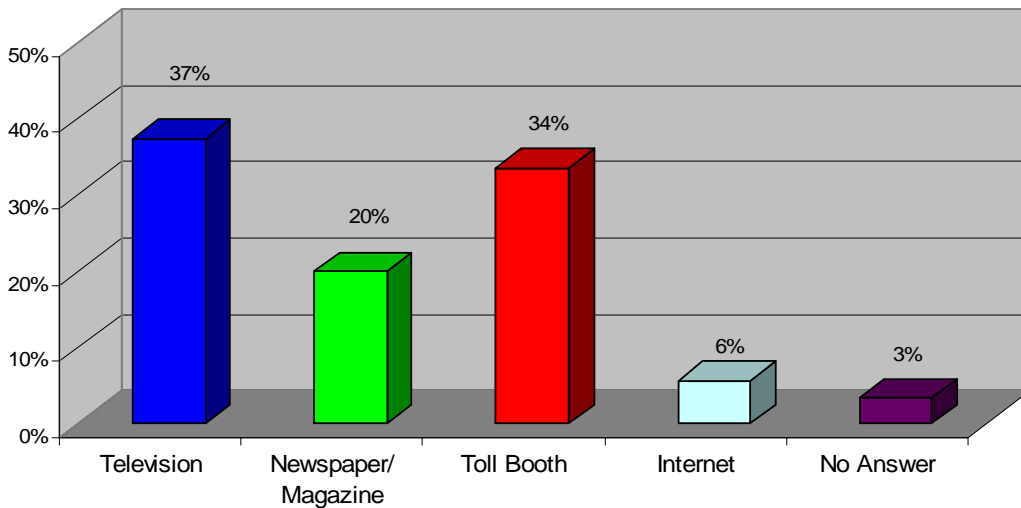


Source: JRD & Associates Customer Surveys

Of the customers who have seen and/or heard advertising for OOCEA, 37% saw advertising about E-PASS through television, while 34% of users did so at a tollbooth, while 20% saw it from local magazines or newspapers.

Figure 46

Where did you see or hear the advertising?

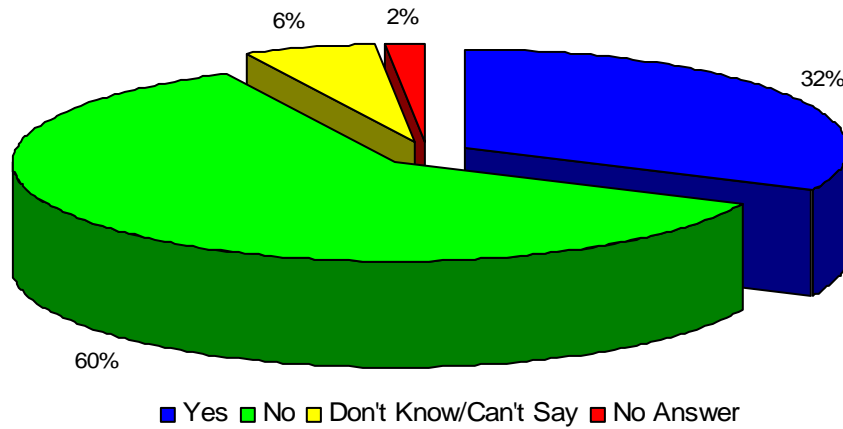


Source: JRD & Associates Customer Surveys

Cash users were asked if they are aware that E-PASS could be used to pay for parking at the local airport. Figure 47 displays that 32% know this information and, as demonstrated in Figure 48, 25% found E-PASS more appealing because of it.

Figure 47

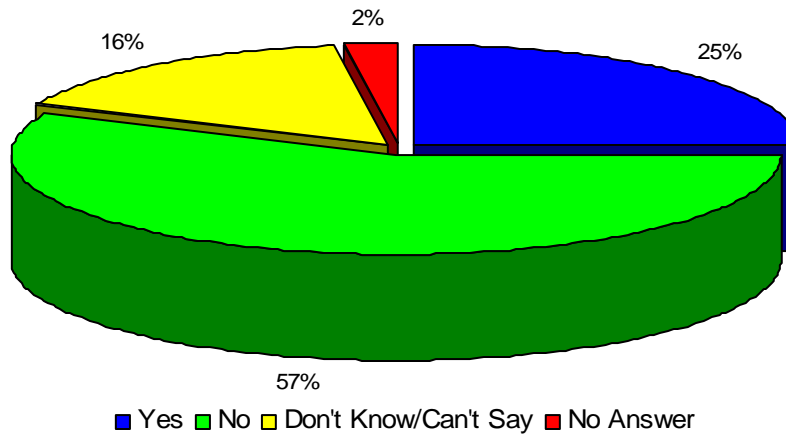
Are you aware that you can use E-PASS to pay for parking at the airport?



Source: JRD & Associates Customer Surveys

Figure 48

Does this make you more interested in converting to E-PASS?

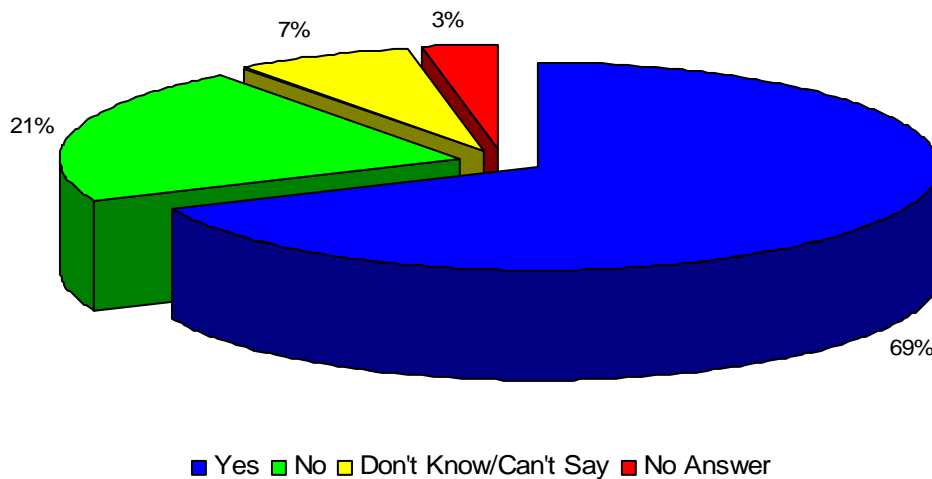


Source: JRD & Associates Customer Surveys

Figure 49 illustrates that 69% of cash users would consider obtaining an E-PASS transponder if it meant reduced tolls. However, 21% are not interested in acquiring a transponder.

Figure 49

If transponder customers paid a lower toll than cash customers, would you consider getting E-PASS?

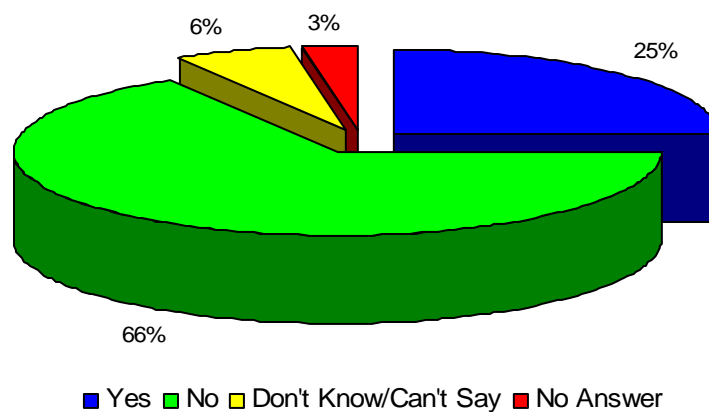


Source: JRD & Associates Customer Surveys

As seen in Figure 50, 66% of cash users expressed that they are unaware that E-PASS customers receive a discount on tolls if they pay more than 40 tolls per month. However, 57% of the customers do not intend to sign up for E-PASS, as depicted in Figure 51.

Figure 50

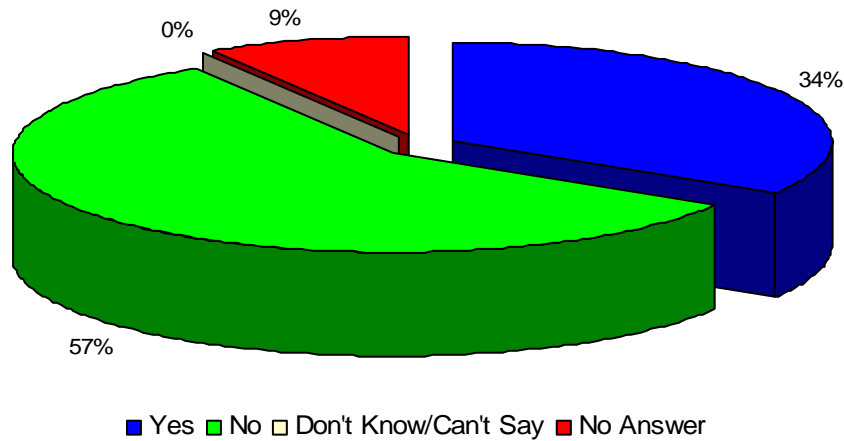
Are you aware that E-PASS customers receive a discount on tolls if they pay tolls more than 40 times per month?



Source: JRD & Associates Customer Surveys

Figure 51

Do you intend to sign up for E-PASS?

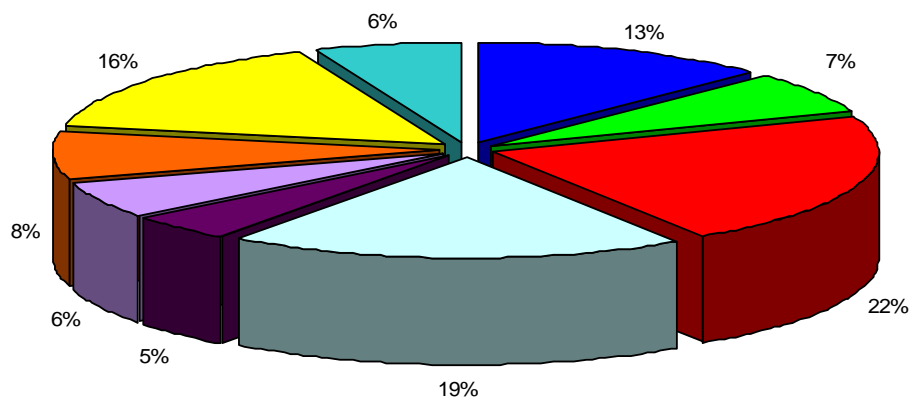


Source: JRD & Associates Customer Surveys

As demonstrated in Figure 52, cash users expressed their primary reasons for deciding against joining the E-PASS program. According to the results, 22% believe that they do not use toll roads frequently enough to make use of the E-PASS program. Another 19% mentioned that the E-PASS is too expensive. In addition to this, 13% stated that they prefer to pay the tolls in cash. However, according to Figure 53, 64% would utilize E-PASS if the E-PASS transponder was made available free of charge.

Figure 52

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

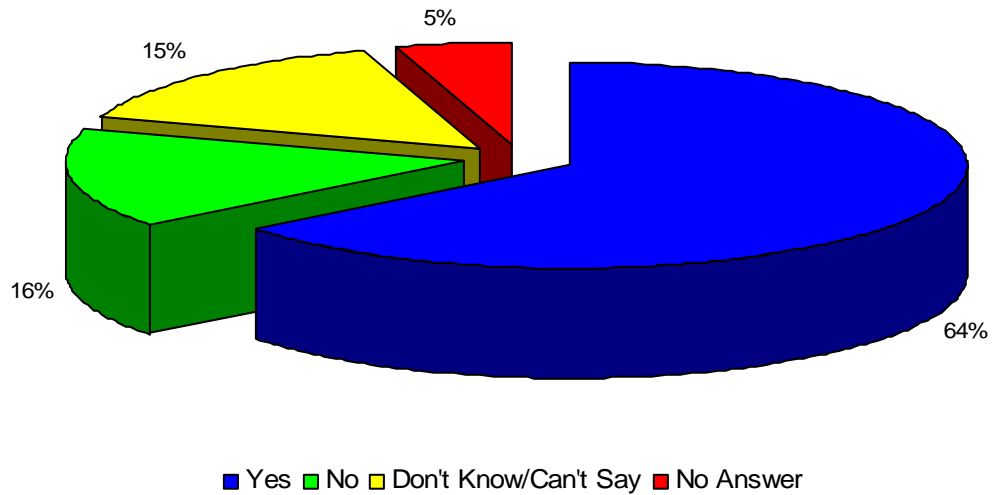


- Prefer to pay cash
- Don't use the toll roads that much
- I don't mind waiting to pay tolls
- I can't get a receipt at the time of my transactions
- No Answer
- Too much trouble to get, it is inconvenient or not enough time to get
- E-PASS costs extra/expensive
- I don't want anyone to have a record of my travels
- Other

Source: JRD & Associates Customer Surveys
Note: Percentages may not add up to 100 due to rounding.

Figure 53

If the E-PASS transponder was free, would you use an E-PASS?

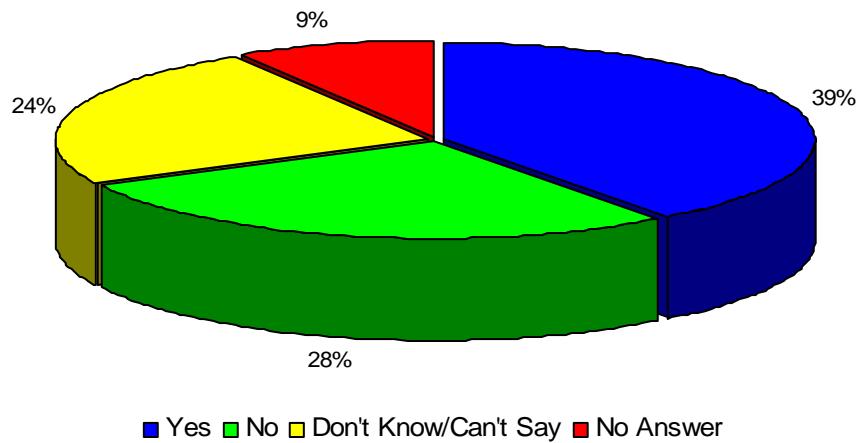


Source: JRD & Associates Customer Surveys

Figure 54 illustrates that 39% of cash users can be persuaded to become E-PASS users. Other data, as previously stated, suggests that users would be more responsive if transponders were free and toll prices were discounted.

Figure 54

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

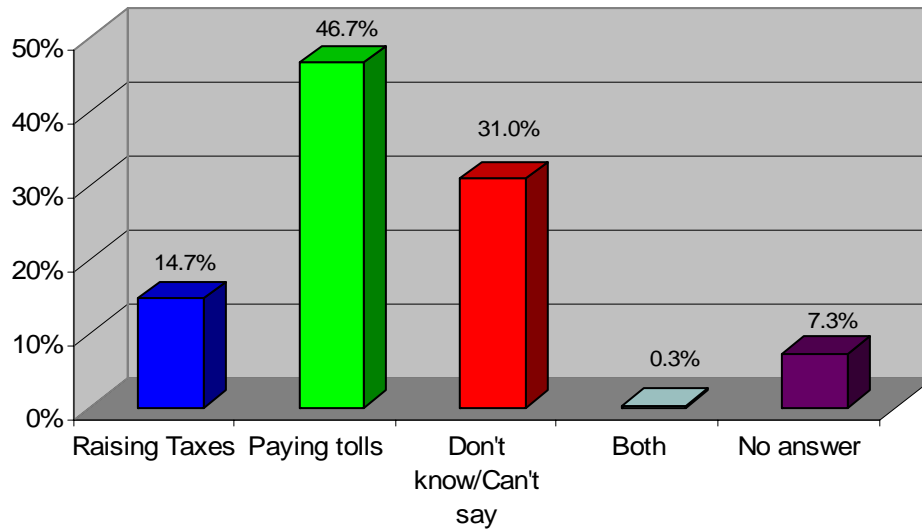


Source: JRD & Associates Customer Surveys

Figure 55 depicts that 46.7% of the customers would rather fund new roads by paying tolls rather than raising taxes. Less than one percent of the customers preferred both.

Figure 55

How would you prefer to fund new roads?



Source: JRD & Associates Customer Survey

EXHIBIT 1 - E-PASS SURVEY IN ENGLISH



E-PASS User Survey

TOLL ROAD USAGE

1. Have you used the toll roads in the Orlando area during the last six months?

Yes No

2. Do you have an E-PASS transponder in your car?

Yes No

3. In which county do you live?

4. How many tolls do you pay in an average week?

Less than 5 5-10 11-15 16-25 More than 26

5. For what purposes do you normally use the Expressway system?

Commuting to work On the job travel Errands School Vacation Special Events Other

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

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
6a. ... the toll roads are faster than other roads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6b. ... the toll roads are cleaner than other roads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6c. ... the toll roads are well maintained	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6d. ... the toll roads are safer to use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6e. ... the toll roads have adequate landscaping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6f. ... the toll roads have adequate signage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Are you aware that E-PASS customers receive a discount on tolls if they pay tolls more than 40 times per month?

Yes No Don't Know/Can't say

8. Do you feel that Road Rangers make travel on the Expressway safer?

Yes No Don't Know/Can't say

9. Do you feel that patrols by Law Enforcement make travel on the Expressway safer?

Yes No Don't Know/Can't say

INFORMATION ON THE EXPRESSWAY AUTHORITY

10. Have you received the Expressway Navigator newsletter?

Yes No Don't Know/Can't say

10a. If yes, did you read the Expressway Navigator newsletter?

Yes No Don't Know/Can't say

10b. If yes, was the information contained in the Expressway Navigator useful to you?

Strongly Agree Agree No Opinion Disagree Strongly Disagree

11. Would you prefer to receive the Expressway Navigator by mail or by e-mail?

Mail E-mail Both Neither No Opinion

E-PASS SERVICES

12. Have you ever called an E-PASS service center?

Yes No

13. If yes, overall, are you very satisfied, satisfied, dissatisfied, or very dissatisfied with the service you received from an E-PASS service center?

Very Satisfied Satisfied No Opinion Dissatisfied Very Dissatisfied

14. Are you aware that from time to time you need to replace the battery in your E-PASS transponder and update your address and license plate information, if it changes, in your E-PASS account?

Yes No Don't Know/Can't say

15. Are you aware that you can replace the battery in your E-PASS transponder for free when it is time to do so?

Yes No Don't Know/Can't say

ROAD FUNDING

16. Would you be willing to pay a higher toll to avoid congestion and traffic delays?

Yes No Don't Know/Can't say

17. Would you prefer to fund new roads by raising taxes or paying tolls?

Raising Taxes Paying Tolls Don't Know/Can't say

18. Overall, how satisfied are you with the E-PASS program?

Very Satisfied Satisfied No Opinion Dissatisfied Very Dissatisfied

ABOUT YOU

19. What is your gender?

Male Female

20. What is your racial/ethnic background?

White Hispanic Black or African-American Asian or Pacific Islander Other

21. What is your education?

Some High School Finished High School Some college Finished college Graduate School

22. How many cars do you have in your household?

1 2 3 or more

23. What is your age?

18-25 26-35 36-45 46-55 56-65 Over 65 years

24. What was your total household income last year?

Under \$15,000 \$25,000 - \$34,999 \$45,000 - \$54,999 \$65,000 - \$74,999 \$85,000 - \$99,999
\$15,000 - \$24,999 \$35,000 - \$44,999 \$55,000 - \$64,999 \$75,000 - \$84,999 \$100,000 - above

ADDITIONAL COMMENTS

25. We would appreciate any comments or concerns you would care to make about your experience with the E-PASS program.

Contact Information (optional)

Name: _____ E-mail: _____

Address: _____

EXHIBIT 2 - E-PASS SURVEY IN SPANISH



Encuesta Para Usuarios De E-Pass

USO DE CARRETERAS CON PEAJE

1. ¿Ha usado las carreteras con peaje en el área de Orlando en los últimos seis meses?
Sí No
2. ¿Tiene un transmisor E-PASS en su carro?
Sí No
3. ¿En qué Condado vive?
4. ¿Cuántos peajes paga en una semana promedio?
Menos de 5 5-10 11-15 16-25 Más de 26
5. ¿Con qué propósito usa normalmente el sistema Expressway?
Trasladarse al trabajo Como parte del trabajo Hacer gestiones Escuela Vacaciones Ocasiones especiales Otro
6. Exprese su opinión en relación a :

	Muy de acuerdo	De acuerdo	Sin opinión	En desacuerdo	Muy en desacuerdo
6a. ... las carreteras con peaje son más rápidas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6b. ... las carreteras con peaje son más limpias que otras	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6c. ... las carreteras con peaje son bien mantenidas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6d. ...las carreteras con peaje son más seguras	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6e. ... las carreteras con peaje tienen áreas verdes adecuadas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6f. ... las carreteras con peaje tienen señales adecuadas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. ¿Sabía Ud. que los clientes de E-Pass reciben un descuento en el peaje cuando usan el sistema más de 40 veces en el mes?
Sí No No lo sé/ No puedo decir
8. ¿Cree que los Ayudantes de Carretera (Road Rangers) hacen el viaje en el Expressway más seguro?
Sí No No lo sé/ No puedo decir
9. ¿Cree que las patrullas por los cuerpos de seguridad hacen el viaje en el Expressway más seguro?
Sí No No lo sé/ No puedo decir

INFORMACION DE LA AUTORIDAD DE AUTOPISTAS (EXPRESSWAY AUTHORITY)

10. ¿Ha recibido la hoja informativa "Expressway Navigator"?
Sí No No lo sé/ No puedo decir
 - 10a. Si la respuesta es positiva, ¿Ud. leyó la hoja informativa "Expressway Navigator"?
Sí No No lo sé/No puedo decir
 - 10b. Si la respuesta es positiva, ¿fue útil la información que encontró en el "Expressway Navigator"?
Muy de acuerdo De acuerdo Sin opinión En desacuerdo Muy en desacuerdo
11. ¿Preferiría recibir el "Expressway Navigator" por correo o por e-mail?
Correo E-mail Ambos Ninguno Sin opinión

SERVICIOS E-PASS

12. ¿Ha llamado en algún momento al centro de servicio de E-PASS?

Si No

13. Si la respuesta es positiva, ¿como se siente, en general, con el servicio recibido en el centro de servicio de E-PASS?

Muy satisfecho Satisfecho Sin opinión Descontento Muy descontento

14. ¿Sabía que, de vez en cuando, necesita cambiar la batería del transmisor, y además actualizar la información de su dirección y/o número de placa de matrícula en su cuenta E-PASS si hay cambios?

Si No No lo sé/No puedo decir

15. ¿Sabía que puede cambiar de gratis la batería del transmisor del E-PASS cuando sea necesario?

Si No No lo sé/No puedo decir

FINANCIAMIENTO DE CARRETERAS

16. ¿Estaría dispuesto a pagar un peaje mayor para evitar congestiones y demoras de tránsito?

Si No No lo sé/No puedo decir

17. ¿Preferiría financiar nuevas carreteras aumentando los impuestos o pagando peajes?

Aumentando impuestos Pagando peajes No lo sé/No puedo decir

18. ¿Cuán satisfecho está, en general, con el programa E-PASS?

Muy satisfecho Satisfecho Sin opinión Descontento Muy descontento

INFORMACIÓN PERSONAL

19. ¿Cuál es su sexo?

Masculino Femenino

20. ¿Cuál es su raza/grupo étnico?

Blanco Hispano Negro o Afro-americano Asiático/ Isleño del Pacífico Otro

21. ¿Cuál es su nivel de educación?

Bachillerato-no terminado Bachillerato Universidad-no terminada Universidad Estudios Superiores

22. ¿Cuántos carros tiene en su casa?

1 2 3 o más

23. ¿Cuál es su edad?

18-25 26-35 36-45 46-55 56-65 Más de 65 años

24. ¿Cuál fue el ingreso familiar total el pasado año?

Menos de \$15,000 \$25,000 - \$34,999 \$45,000 - \$54,999 \$65,000 - \$74,999 \$85,000 - \$99,999
\$15,000 - \$24,999 \$35,000 - \$44,999 \$55,000 - \$64,999 \$75,000 - \$84,999 \$100,000 o mas

COMENTARIOS ADICIONALES

25. Apreciaríamos cualquier comentario, queja o sugerencia que pueda ofrecer en relación a su experiencia con el programa E-PASS.

Información (opcional)

Nombre _____ E-mail: _____

Dirección: _____

EXHIBIT 3 - CASH USER SURVEY IN ENGLISH



Cash Users Survey

TOLL ROAD USAGE

1. Have you used the toll roads in the Orlando area during the last six months?

Yes No

2. Do you have an E-PASS transponder in your car?

Yes No

2a. If yes, please go complete the E-PASS survey at <http://www.expresswayauthority.com/EPASSsurveys/>.

2b. If no, please complete this survey or go to <http://www.expresswayauthority.com/UserSurveys>.

3. In which county do you live?

4. How many tolls do you pay in an average week?

Less than 5 5-10 11-15 16-25 More than 26

5. For what purposes do you normally use the Expressway system?

Commuting to work On the job travel Errands School Vacation Special Events Other

6. In the last three months, have you ever avoided using the toll roads?

Yes No

6a. If yes, why?

To save money Long waits at toll booths Not convenient Too much traffic Toll roads don't go where I need to go
Other

7. Do you feel that Road Rangers make travel on the Expressway safer?

Yes No Don't Know/Can't say

8. Do you feel that patrols by Law Enforcement make travel on the Expressway safer?

Yes No Don't Know/Can't say

INFORMATION ON THE EXPRESSWAY AUTHORITY

9. Have you heard about the E-PASS electronic toll collection system before today?

Yes No

10. Have you seen or heard any advertising for the Expressway Authority or E-PASS?

Yes No

10a. If yes, where did you see or hear the advertising? (Select all that apply)

Television Newspaper/Magazine Toll Booth Internet

E-PASS SERVICES

11. Are you aware that you can use E-PASS to pay for parking at the airport?

Yes No Don't Know/Can't say

11a. Does this make you more interested in converting to E-PASS?

Yes No Don't Know/Can't say

12. If transponder customers paid a lower toll than cash customers, would you consider getting E-PASS?

Yes No Don't Know/Can't say

13. Are you aware that E-PASS customers receive a discount on tolls if they pay tolls more than 40 times per month?

Yes No Don't Know/Can't say

14. Do you intend to sign up for E-PASS?

Yes No

14a. If no, what is your primary reason for not getting E-PASS?

- Prefer to pay cash I don't mind waiting to pay tolls
- Too much trouble to get, it is inconvenient or not enough time to get I don't want anyone to have a record of my travels
- Don't use the toll roads that much I can't get a receipt at the time of my transactions
- E-PASS costs extra/ expensive Other

15. If the E-PASS transponder was free, would you use an E-PASS?

Yes No Don't Know/Can't say

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

Yes No Don't Know/Can't say

16a. If yes, what?

ROAD FUNDING

17. Would you prefer to fund new roads or improvement to existing roads by raising taxes or paying tolls?

Raising Taxes Paying Tolls Don't Know/Can't say

ABOUT YOU

18. What is your gender? 19. What is your racial/ethnic background?

Male Female White Hispanic Black or African-American Asian or Pacific Islander Other

20. What is your education?

Some High School Finished High School Some college Finished college Graduate School

21. How many cars do you have in your household? 22. What is your age?

1 2 3 or more 18-25 26-35 36-45 46-55 56-65 Over 65 years

23. What was your total household income last year?

Under \$15,000 \$25,000 - \$34,999 \$45,000 - \$54,999 \$65,000 - \$74,999 \$85,000 - \$99,999
\$15,000 - \$24,999 \$35,000 - \$44,999 \$55,000 - \$64,999 \$75,000 - \$84,999 \$100,000 - above

ADDITIONAL COMMENTS

24. Please provide any comments or concerns you would care to make about your experience with the E-PASS program.

25. Would you like to receive information about the toll roads or E-PASS or receive a free E-PASS transponder?

Yes No

25a. If so, please provide your email or contact information.

Name: _____ E-mail: _____
Address: _____

EXHIBIT 4 - CASH USER SURVEY IN SPANISH



Encuesta Para Usuarios De Efectivo

USO DE CARRETERAS CON PEAJE

1. ¿Ha usado Ud. las carreteras con peaje en el área de Orlando en los últimos seis meses?
Si No
2. ¿Tiene Ud. un transmisor E-PASS en su carro?
Si No
- 2a. Si la respuesta es positiva, por favor, conteste la encuesta E-Pass localizada en la página <http://www.expresswayauthority.com/EPASSsurveys/>.
- 2b. Si la respuesta es negativa, por favor, conteste esta encuesta o su copia electrónica localizada en la pagina <http://www.expresswayauthority.com/UserSurveys>.
3. ¿En qué Condado vive Ud.?
4. ¿Cuántos peajes paga en una semana promedio?
Menos de 5 veces 5-10 veces 11-15 veces 16-25 veces Más de 26 veces
5. ¿Con qué propósito usa normalmente el sistema Expressway?
Trasladarse al trabajo Como parte del trabajo Hacer gestiones Escuela Vacaciones Ocasiones especiales Otro
6. ¿En los últimos 3 meses ha evitado alguna vez el uso de las carreteras con peaje?
Si No
- 6a. Si lo ha hecho, indique por qué.
Para ahorrar dinero Largas esperas en las taquillas de pago No es conveniente Demasiado tránsito
Las carreteras con peaje no pasan por donde tengo que ir Otro
7. ¿Cree que los Ayudantes de Carretera (Road Rangers) hacen el viaje en el Expressway más seguro?
Si No No lo sé/ No puedo decir
8. ¿Cree que las patrullas por los cuerpos de seguridad hacen el viaje en el Expressway más seguro?
Si No No lo sé/ No puedo decir

INFORMACION DE LA AUTORIDAD DE AUTOPISTAS (EXPRESSWAY AUTHORITY)

9. ¿Ha oído anteriormente sobre el sistema de cobro electrónico E-PASS?
Si No
10. ¿Ha visto o escuchado algún anuncio del Expressway Authority o del E-PASS?
Si No
- 10a. Si la respuesta es positiva, ¿donde vio o escuchó el anuncio? (Indique todos los que aplican)
Televisión Periódico/Revista Taquilla de Pago Internet

SERVICIOS E-PASS

11. ¿Sabía que puede usar E-PASS para pagar el estacionamiento en el aeropuerto?
Si No No lo sé/No puedo decir
- 11a. ¿Lo hace esto más interesado en unirse a E-PASS?

Si No No lo sé/No puedo decir

12. Si los clientes con transmisores E-PASS pagaran menos peaje que los clientes que pagan en efectivo ¿consideraría adquirir el E-PASS?

Si No No sé/No puedo decir

13. ¿Sabía Ud. que los clientes de E-PASS reciben un descuento en el peaje cuando usan el sistema más de 40 veces en el mes?

Si No No sé/No puedo decir

14. ¿Considera firmar para el E-PASS?

Si No

14a. Si su respuesta es negativa, ¿cual es su razón principal?

- | | | | |
|--|--------------------------|--|--------------------------|
| Prefiero pagar en efectivo | <input type="checkbox"/> | No me importa la espera para pagar el peaje | <input type="checkbox"/> |
| Muchos problemas para obtenerlo, es inconveniente o no tengo suficiente tiempo | <input type="checkbox"/> | No quiero que nadie tenga un registro de mis viajes | <input type="checkbox"/> |
| No uso mucho las carreteras con peaje | <input type="checkbox"/> | No puedo obtener un recibo en el momento de la transacción | <input type="checkbox"/> |
| El E-PASS cuesta más/Es caro | <input type="checkbox"/> | Otro | <input type="checkbox"/> |

15. Si el transmisor del E-PASS fuera gratis, ¿obtendría Ud. el E-PASS?

Si No No lo sé/No puedo decir

16. ¿Existe algo que el Expressway Authority pueda hacer para animarlo a comprar un transmisor E-PASS?

Si No No lo sé/No puedo decir

16a. ¿Si la respuesta es positiva, que podemos hacer?

FINANCIAMIENTO DE CARRETERAS

17. ¿Preferiría financiar nuevas carreteras aumentando los impuestos o pagando peajes?

Aumentando impuestos Pagando peajes No lo sé/No puedo decir

INFORMACIÓN PERSONAL

18. ¿Cuál es su sexo?

Masculino Femenino

19. ¿Cuál es su raza/grupo étnico?

Blanco Hispano Negro o Afro-americano Asiático/ Isleño del Pacífico Otro

20. ¿Cuál es su nivel de educación?

Bachillerato-no terminado Bachillerato Universidad-no terminada Universidad Estudios Superiores

21. ¿Cuántos carros tiene en su casa? 22. ¿Cuál es su edad?

1 2 3 o más 18-25 26-35 36-45 46-55 56-65 Más de 65 años

23. ¿Cuál fue el ingreso familiar total el pasado año?

Menos de \$15,000 \$25,000 - \$34,999 \$45,000 - \$54,999 \$65,000 - \$74,999 \$85,000 - \$99,999
\$15,000 - \$24,999 \$35,000 - \$44,999 \$55,000 - \$64,999 \$75,000 - \$84,999 \$100,000 o mas

COMENTARIOS ADICIONALES

24. Apreciaríamos cualquier comentario, queja o sugerencia que pueda ofrecer en relación a su experiencia con el programa E-PASS.

25. ¿Le gustaría recibir información sobre las carreteras con peaje o E-PASS o recibir un transmisor E-PASS gratis?

Si No

25a. Si la respuesta es positiva, por favor, suministre su dirección electrónica (e-mail) o información de contacto.

Nombre: _____ E-mail: _____

Dirección: _____

EXHIBIT 5 - PHONE SURVEY IN ENGLISH



Phone Survey

TOLL ROAD USAGE

1. Are you currently an E-PASS customer?

Yes No

If yes, GO TO E-PASS SURVEY ENGLISH

If no, GO TO QUESTION 2

If don't know, STOP SURVEY

2. Have you used the toll roads in the Orlando area during the last six months?

Yes No

If yes, GO TO CASH USER SURVEY ENGLISH

If no, GO TO QUESTION 3

3. Do you drive a car?

Yes No

If yes, GO TO QUESTION 4

If no, STOP SURVEY

4. In which county do you live?

5. Why do you not use the toll road system? (Select all that apply)

Doesn't go where I need to go	<input type="checkbox"/>	Too expensive	<input type="checkbox"/>
Too much traffic	<input type="checkbox"/>	Unsafe	<input type="checkbox"/>
I don't know where it goes	<input type="checkbox"/>	Other, Please explain	<input type="checkbox"/>

6. Toll roads are a good way to get around, but I don't have a need for their use.

Strongly Agree Agree No Opinion Disagree Strongly Disagree

7. Is there anything that the Expressway Authority can do to encourage you to use the toll roads?

Yes No Don't Know/Can't say

7a. If yes, what?

INFORMATION ON THE EXPRESSWAY AUTHORITY

8. Have you seen or heard any advertising for the Expressway Authority or E-PASS?

Yes No

8a. If yes, where did you see or hear the advertising? (Select all that apply)

Television Newspaper/Magazine Toll Booth Internet

ROAD FUNDING

9. Would you prefer to fund new roads by raising taxes or paying tolls?

Raising Taxes Paying Tolls Don't Know/Can't say

ABOUT YOU

10. What is your gender?

Male Female

11. What is your racial/ethnic background?

White Hispanic Black or African-American Asian or Pacific Islander Other

12. What is your education?

Some High School Finished High School Some college Finished college Graduate School

13. How many cars do you have in your household?

1 2 3 or more

14. What is your age?

18-25 26-35 36-45 46-55 56-65 Over 65 years

15. What was your total household income last year?

Under \$15,000 \$25,000 - \$34,999 \$45,000 - \$54,999 \$65,000 - \$74,999 \$85,000 - \$99,999
\$15,000 - \$24,999 \$35,000 - \$44,999 \$55,000 - \$64,999 \$75,000 - \$84,999 \$100,000 - above

ADDITIONAL COMMENTS

16. Do you have any comments you would like to add?

17. Would you like to receive information about the toll roads or E-PASS or receive a free E-PASS transponder?

Yes No

17a. If so, please provide your email or contact information.

Name: _____ E-mail: _____

Address: _____

Surveyor: _____

EXHIBIT 6 - PHONE SURVEY IN SPANISH



Encuesta por Teléfono

USO DE CARRETERAS CON PEAJE

1. ¿Es Ud. un cliente del programa E-PASS?

Si No

Si la respuesta es positiva, VAYA A LA ENCUESTA DE E-PASS SPANISH,

Si la respuesta es negativa, VAYA A LA PREGUNTA #2

Si el cliente no sabe, PARE LA ENCUESTA SPANISH

2. ¿Ha usado las carreteras con peaje en el área de Orlando en los últimos seis meses?

Si No

Si la respuesta es positiva, VAYA A LA ENCUESTA DE USUARIOS DE EFECTIVO SPANISH

Si la respuesta es negativa, VAYA A LA PREGUNTA #3

3. ¿Conduce un carro?

Si No

Si la respuesta es positiva, VAYA A LA PREGUNTA #4

Si la respuesta es negativa, PARE LA ENCUESTA

4. ¿En qué Condado vive?

5. ¿Por qué no usa el sistema de carreteras con peaje? (indique todos los que aplican)

No pasa por donde necesito ir Muy caro

Demasiado tránsito No es seguro

No sé a donde va Otro, por favor, explique _____

6. Las carreteras con peaje son buenas para viajar, pero no tengo necesidad de usarlas.

Muy de acuerdo De acuerdo Sin opinión En desacuerdo Muy en desacuerdo

7. ¿Existe algo que el Expressway Authority pueda hacer para animarlo a usar las carreteras con peaje?

Si No

7a ¿Si la respuesta es positiva, qué podemos hacer?

INFORMACION DE LA AUTORIDAD DE AUTOPISTAS (EXPRESSWAY AUTHORITY)

8. ¿Ha visto u oído cualquier anuncio del Expressway Authority o de E-PASS?

Si No

8a. Si la respuesta es positiva, ¿donde vio o escuchó el anuncio?

Televisión Periódico/Revista Taquilla de Pago Internet

FINANCIAMIENTO DE CARRETERAS

9. ¿Preferiría financiar nuevas carreteras aumentando los impuestos o pagando peajes?

Aumentando impuestos Pagando peaje No lo sé/o puedo decir

INFORMACIÓN PERSONAL

10. ¿Cuál es su sexo?

Masculino Femenino

11. ¿Cuál es su raza/grupo étnico?

Blanco Hispano Negro o Afro-americano Asiático/ Isleño del Pacífico Otro

12. ¿Cuál es su nivel de educación?

Bachillerato-no terminado Bachillerato Universidad-no terminada Universidad Estudios Superiores

13. ¿Cuántos carros tiene en su casa?

1 2 3 o más

14. ¿Cuál es su edad?

18-25 26-35 36-45 46-55 56-65 Más de 65 años

15. ¿Cuál fue el ingreso familiar total el pasado año?

Menos de \$15,000 \$25,000 - \$34,999 \$45,000 - \$54,999 \$65,000 - \$74,999 \$85,000 - \$99,999
\$15,000 - \$24,999 \$35,000 - \$44,999 \$55,000 - \$64,999 \$75,000 - \$84,999 \$100,000 o mas

COMENTARIOS ADICIONALES

16. Por favor, incluya cualquier comentario adicional.

17. ¿Le gustaría recibir información sobre las carreteras con peaje o E-PASS o recibir un transmisor E-PASS gratis?

Si No

17a. Si la respuesta es positiva, por favor, suministre su dirección electrónica (e-mail) o información de contacto

Nombre: _____ E-mail: _____

Dirección: _____

Encuestador: _____

EXHIBIT 7 - GROUPING OF CUSTOMER COMMENTS

The following statements were made by survey respondents.

Toll Plazas

- Green light do not always work due to inconsistent signal strength and consequently a violation and fine, is imposed (i.e. SR 528 to 520, OIA, Osceola Parkway, Eastbound lane on Beachline, SR408, Hiawassee, Pine Hills, SR 429 exit 19, Aloma).
- Need for public bathrooms.
- Better lane marking for lanes approaching/leaving toll plazas.
- Every toll plaza should have dedicated E-PASS lane. All lanes should be open.
- There should be people attending toll booths, smaller change provided.
- Lots of exit tolls counting money inaccurately.
- You put your money in the basket, and it takes it but the red light comes on.
- Have two or more stations open during peak hour.

Transponders

- Failure of the transponders to signal while leaving a toll plaza.
- Low quality of the holding strap subject to Florida's heat.
- Failure to communicate the user if the battery has no remaining power it results in a violation whenever the toll is passed.
- Difficulty in getting new batteries at Lowe's including long drives to the nearest store.
- Inability to obtain the batteries by mail.
- Cost of the transponders.
- Having to pay for a new transponder if the "old" one becomes unusable. No discounts for replacements.
- Inability to use a single transponder at a multi-car family.
- Inability to cancel or track a stolen or lost transponder.
- Size of the transponder.
- If transponders do not work, may get a ticket or their driver's license suspended.
- Transponder does not always trigger gate opening at Airport.
- Need to know the meaning of the different tones in the transponder.
- Transponders should be changed to the "no-battery" type.
- Provide adequate holders like the ones sold at Publix.
- Information is needed about transponder operation (i.e., dead battery, and lights).
- Information could be included in the web page and/or the newsletter.
- Should use notifications and not give tickets when credit card is on account and transponder does not work properly.
- Can malfunction, overcharges.
- Don't trust it's accuracy.

Traffic Safety/Efficiency

- Add more overhead toll reader lanes to ease congestion in high volume areas.
- Bottlenecks at toll booths on E-W, near SR 436 are dangerous.

- Construction detour around Lake Underhill very dangerous/bumpy.
- E-W lanes from Goldenrod to E. toll plaza are unsafe to drive. Lanes are not visible at night or in the rain.
- Need to lower speed limit on SR 408.
- Improve traffic flow at the loop. Very congested before and after paying the toll.
- Review design of entrance to SR 408 from Pine Hills Road. E-PASS users have to cross lanes with people exiting SR 408 to pay tolls.
- Review lanes marking between Goldenrod and Crystal Lake. It is hard to know where the new and old lines go.
- Post signs advising approaching motorists the speed limits at toll plazas, so they don't have to brake.
- Review exit to the Airport. E-PASS is on the left and it is necessary to cut across 3-5 lanes to get to the airport exit.
- Create traffic information signs to warn drivers of upcoming traffic problems.
- Review traffic flow to avoid non-E-PASS vehicles to block E-PASS lanes while trying to cut into "cash" lanes.
- Review signage and road marking at the split of SR 417 and SR 408.
- Improve placement and information on construction signage.
- Need additional E-PASS lanes on SR 408 toward Semoran exit? Regular toll booths are faster.
- Review location of exit sign traveling to OIA from Sanford. Not enough time allowed for getting to the right.
- Increase speed limit to 70 as in the Turnpike.
- Speed limits are not constant and signs are difficult to see.
- Install bigger signs at tolls entrance.
- Cars need to slow down.
- Make east bound 436 exit safer.
- Have two or more stations open to decrease waiting time.
- SR 528 Airport toll plaza should have express lanes.
- E-PASS lanes need longer E-PASS only areas in advance of toll booths to prevent changes from people waiting to get into the cash lanes at the last minute.
- Speed limits should be increased to facilitate faster travel.
- Need review of working condition of green lights at tolls.
- Increase number of E-PASS lanes to facilitate traffic at toll plazas.
- The speed limit is not clear on some of the toll booths.
- On SR 408 at peak hours the line for E-PASS is longer than the cash line. That seems to defeat the purpose all together.

Tolls Cost

- Tolls are too high and frequent.
- We pay enough taxes. The Government (Federal, State and County) should cover the costs using tax money.
- We were told that once the roads were paid, tolls would be eliminated. That hasn't happened.

- Review discount offered and create new categories, i.e. frequent users, senior citizens etc.
- Do not raise fares.
- Increase fares to non-E-PASS users.
- Provide users with option to pay with bills instead of only coins in every toll.
- Tolls are very expensive for small distances on the expressway.
- Review toll prices whenever a car is tow by a motor home.
- If toll prices are increased, people will decrease the use of toll roads.
- Get rid of toll roads.
- Every road in Orlando is a toll road besides I-4. I-4 and East/West expressway should not be a toll road.
- If toll roads were free would have no traffic problems paid for our taxes.
- Lower the price for E-PASS users.
- The tolls seem high east of Orlando.
- Tolls are too high. It cost me \$10 to go to Orlando Airport.

Citations and Fines

- There should be a rapid notification program and the capability of paying missing tolls. This should be tried prior to take legal action.
- The license is suspended.
- Out-of-state drivers go through the tolls without paying and never are caught.
- No interface between E-PASS and DMV for automatic update of related information; Some toll exits (i.e. SR 408) have no speed limits signs posted, but fines can be imposed for speeding through the booths.
- Police should fine drivers who do not have E-PASS but pull up to the E-PASS ONLY exit booths at the airport and hold up everyone else.
- When a car passes trough a toll and does not register, the system should record the license plate and charge for the toll instead of sending me a nasty letter or a fine.
- I pay cash and I still get notices in the mail that I didn't pay.
- My license was suspended in error.
- Aggressive drivers need to be punished.

E-PASS Accounting System

- System inability to add toll funds by phone on a 24/7 basis.
- Ability to put a smaller deposit amount on their account when replenishing on the Internet.
- E-PASS users who own more than one vehicle should be allowed to move the transponder to use in any vehicle providing all vehicles are registered on the same account.
- Records of charges and dates are not available on hard copy.
- Unreliable account updates procedures over the Internet.
- Inability to know account balance on a real-time basis at the tolls.
- Lack of accuracy on the toll charges. Frequent overcharges.
- Difficulty to cancel a transponder lost or stolen.

- Difficulty to access account information on-line. Web site not user friendly.
- Users should be able to switch transponders from one car to another without having to provide so much information.
- The cost of the transponder is too high. Lower the price and apply the amount reduced toward tolls.
- Don't like to use credit cards. Would be inclined to use E-PASS if I could pay in cash.
- An account should be treated as one, no matter how many cars are on the account. The use of all cars must be added to calculate the discount instead of apply the discount for each individual car.
- System should provide hard copy statements.

Toll Attendant Service

- Some of the tolls attendants need more training /how to speak to people.
- The people who run the toll booths are wonderful, very friendly.
- The toll takers are great with directions and always friendly.

Other

- Develop E-PASS reciprocal agreements with other out-of-state similar systems.
- Need for updated maps showing the Expressway system and its toll plazas. Maps to be available at Service Centers and booths, and published on the Newsletter.
- Suggestions to expand transportation facilities into mono-rails.
- Thank you very much for giving the opportunity to Spanish-speaking people to participate in this survey.
- After watching on TV news about "bad" incidents with the E-PASS transponders, I decided not to participate in the program.
- Please do something about toll workers talking for too long to cars paying tolls. They hold the traffic.

Discounts

- Discounts are very limited. Regular E-PASS users should pay less than cash users.
- Discounts should be based on account usage not on individual vehicles.
- Create discounts for senior citizens and school teachers.
- Create a monthly pass with flat fee and unlimited access.
- Tolls should be discounted when the road is paid for.
- Create discounts based on a number of uses scale.

Credit Cards

- Difficult to update account payment information even if the account is paid by credit card.
- It would be a good idea to have a credit card exclusively for tolls.
- Accept credit cards at the toll booths for use when the customer is out of change.

Construction

- A North-South expressway between I-4 and SR 417 is needed.
- An E-W expressway from Rt. 19 to SR 408 needs to be built to replace Rt. 50.
- Build a toll road parallel to I-4 to ease I-4 congestion.
- Build some easy on/off rest stops.
- Wider toll booths are needed.
- SR 408 at Conway is very unsafe due to construction.
- SR 408 should be extended past E 50 Highway, past Bonneville, and out towards Bithlo. Will help significantly with congestion.
- SR528 and SR408 are horrible during rush hours. Construction should be done only at night.
- Connect Avalon Park Blvd. at SR 528.
- Finish the Lake Underhill section soon.
- Drainage for run off after thunderstorms is inadequate (i.e. Orange Avenue entry ramp).
- Construction between I-4 and Challenger Pkwy has made the roads a disaster with potholes and sharp turns.
- Getting the total loop around Orlando will be great.
- Signs announcing roadwork ahead are inadequate, especially at night.
- Clermont needs a connection off RT 27.
- In construction areas temporary asphalt is poorly done and not maintained.
- Install mile marker signs.
- Include SR 46 from Sanford to SR441 at Mount Dora in the Wekiva Parkway.
- Make signs more visible before the need for lane changes. Many signs are not lighted at night.
- Mark the lanes clearer while under construction.
- Extend SR 417 into Lake County.
- New airport signage on the westbound beach line is misleading.
- Continue SR 429 to Poinciana.
- The Bee Line needs to be better marked from SR 417.
- A direct connection from SR 417 to the Turnpike is needed.
- Need to connect Avalon Park to SR 528.
- I have decreased the use of the Expressway due to the delays created by the construction.
- There should be an exit from 417 straight to Valencia College.
- Construction areas are not properly laid out as far as bypass.
- Construction information (i.e. start, bypasses, completion, etc.) should be posted in the web page.
- Spend less in landscaping and more on safety (i.e. Turnpike to SR 429).
- Build a wall at La Jolla on E-W. Too noisy.
- Review airport exit signage and lane markings.
- Smooth out a rough transition over one of the overpasses on the eastbound lane. heading into Apopka from the Winter Garden area.
- Construction takes too long.

Service Centers

- Add Winter Garden Lowe's as a Service Center.
- Help at the Service Centers (both, in person and by telephone) is inefficient and not customer-friendly. Some employees are rude;
- Customer Service Centers should operate on a 24/7 basis.
- Customer Service employees at Goldenrod office are not friendly, wrong attitude.
- Not enough employees for number of visiting users.
- Customer Service employees need better telephone and communication skills.
- Service Centers should have updated maps showing all the toll locations.
- More Service Centers are needed outside of Orlando. Consider outsourcing.
- People working at the Customer Center on West Colonial are especially nice, knowledgeable and professional.
- Authorize joint accounts so both, husband and wife, can check on issues.
- Reminders of maintenance, such as battery replacements would be good customer service.
- The new people at Goldenrod are an improvement over the old people. A very pleasant and professional group.
- Your phone system is not good. Can never talk to anyone.
- Very disappointed to staff courtesy and attention at West Colonial office.
- Would appreciate an 800 number to contact you. The wait is unbelievable.
- Service Centers are located at very inconvenient locations.
- It is very difficult to communicate over the phone.
- To get someone in the telephone is a headache.
- Horrible customer service. Rude and completely useless. Managers are also rude.
- Customer service representative was demeaning and accusatory. Need training in dealing with users.
- Visited the Goldenrod center. Excellent service!
- Lines at Service Centers can be time consuming.
- The Service Center at West Oaks Mall was very convenient for those on the West side.
- Need to work on customer service training via phone.

On-Line System

- Accessing on-line system is too difficult.
- System did not recognize a valid password.
- Unable to update an account on-line.
- Non-computer oriented users may benefit from some easy-to-follow instructions on how to use the system.
- Some users have problems with the format used for the on-line account management.
- Use the on-line system to provide information on where to obtain free batteries.
- Difficult to update account information.
- Problems logging in with the proper username and password.

Road Rangers

- Road Rangers make travel safer they provide but their services are not worth their cost.

Law Enforcement

- Hardly see any law enforcement officers.
- Install emergency phones to Highway Police stations where possible.
- Extra efforts are needed to catch speeders, tailgaters, aggressive drivers and toll payment skippers.
- Need more patrol presence on Beachline and southern GreenWay loop.
- Need more illegal u-turn enforcement.
- Unmarked police cars are needed for enforcement.
- Better enforcement of speed limits is needed.

Expressway Navigator

- Expressway Navigator is a waste of paper.
- I keep the newsletter in my car to refer to map. Excellent publication.
- Maps in the newsletter need a lot more details. Updated map should help a lot.
- Include more information on process to change batteries and replacement of transponders.
- Eliminate the newsletter. Save money and reduce tolls.

Funding

- Toll roads need to be financed by taxes avoiding the expenses of toll collection structures and personnel, which could then be used to build and maintain new toll roads.
- Happy with existing routes and rates. Not confident, however, that increased rates or taxes can be justified with the speculation of misappropriated budget funds being publicized.
- I don't mind paying higher tolls to fund a program but the tolls never come back down once it is paid for. I refuse to believe that it never gets paid off.
- In general, I support raising taxes for this because I feel its better when all people have good access.
- I thought that the gas tax was to fund roads.
- No more taxes, no more tolls.
- I would support toll increases as long as the integrity and quality of service was kept up. Perhaps toll increases should be indexed to CPI.
- Raising taxes in all central counties would help increase more funds to build/expand toll roads.
- The cost to build and re-configure toll booths during widening projects offsets the value of using tolls vs. taxes. Taxes would save the cost of the toll booths and E-PASS system in Orange County.

- Tourist dollars should fund the roadway as Orlando serves as a gateway to other cities and states.
- Once the roads are paid off the cost of tolls should be reduced.
- Increase your revenue by increasing the toll road volume not by increasing the toll price.
- With the money that is brought in through E-PASS, surely we don't need to increase the dollar amount of tolls for new road construction (or increase taxes).
- The only tax that should be used is gasoline tax.
- Let the gas taxes pay for roads then lower or eliminate tolls which in turn would decrease road congestion.
- Too much money spent on landscaping. With better allocation of funds there will be no need to raise tolls.

Comments not Relevant to OOCEA

- Need for additional toll plazas (i.e. Groveland and Clermont).
- Provide all cash or E-PASS exits with receipts machines (i.e. OBT both in Kissimmee).
- No place to change batteries in Pinellas County.
- Transponder fails to activate toll and registers as a violation (DOT).
- Transponders were free on Mothers Day, are there other times I could receive a free transponder?
- Review location of signs for the amusement parks to give people more time to get ready for the exit.
- Add an "E-PASS Only" lane at the toll booth on the Polk Parkway after exiting I-4 West.
- Review that all toll plazas have at least one dedicated E-PASS lane (i.e. Highway 27 north of Clermont).
- Wait on SR 520 is too long.
- Osceola Parkway should not be a toll plaza. Traffic lights make it slow moving.
- Orange County residents should get a free E-PASS and tolls at Lake Jessup are too high.
- Please do something about the expensive (\$2) toll on the greenway.
- A fine is imposed and the user has to send a check even though he has a credit card account with E-PASS that could have been debited. Users have had to go to court for a \$.25 fine.
- Sometimes letters are sent to the users asking a \$.25 "unpaid" toll. The cost of the letter is bigger than the amount requested.
- A very strong and menacing letter is received warning the user of the potential suspension of its license unless he pays a fine. Customers resent the tone of the letter.
- Toll staff is exceptional. They are always polite and pleasant. I have always been impressed by them (i.e. Shannon and Angel in Clermont).
- A high speed toll at Lake Jessup would be useful.
- A ramp for SR 408 at Conway Rd. would be nice.
- Install lighting at Osceola Parkway.

- West Oaks Mall Service Center is your best kept secret.
- Kissimmee Service Center was closed. It was very conveniently located.
- It is wasteful to glossy literature and mail to customers. Provide option NOT to receive.

EXHIBIT 8 - SURVEY COVER LETTER

June 20, 2008

Dear E-PASS Customer,

I would like to thank you for being a part of the E-PASS program. The Orlando-Orange County Expressway Authority is committed to high standards of service and we constantly strive to do our very best for our customers. We would like to get your feedback regarding how well we are doing and how we can improve our services and our roads.

We value your opinion. JRD & Associates, Inc. is providing us with an independent user satisfaction report based on your comments. You can assist us by completing the enclosed survey and returning it to JRD & Associates in the pre-paid postage envelope provided. You can instead, if more convenient for you, complete the survey online by going to <http://www.expresswayauthority.com/EPASSsurveys/> .

Only a limited number of our customers will be receiving this survey, so your participation is very important. Please complete and return the survey by July 18th to help us meet our deadlines. Thank you for taking the time to complete this survey and for giving us the opportunity to better serve your transportation needs.

Sincerely,

Michael Snyder, P.E.
Executive Director