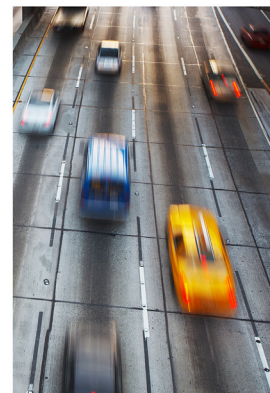


CUSTOMER SATISFACTION SURVEY
FOR 91 EXPRESS LANES

REPORT PREPARED FOR THE
ORANGE COUNTY TRANSPORTATION AUTHORITY



OCTOBER 15, 2011



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INTRODUCTION

The Orange County Transportation Authority (OCTA) is the county transportation commission responsible for planning, funding and delivering transportation improvements in Orange County—including freeway, street, and transit systems. In 2003, OCTA purchased the 91 Express Lanes (Lanes) from the California Private Transportation Company (CPTC), with the purpose being to expedite general purpose and capacity improvements to State Route 91 (SR-91) that otherwise would be delayed due to a noncompete provision that existed in the franchise agreement between CPTC and Caltrans. Since 2003, OCTA has been responsible for managing the 91 Express Lanes and related facilities, as well as setting all policy, pricing, and performance standards for the toll road.

PURPOSE OF STUDY The overarching purpose of the survey presented in this report was to provide OCTA with a *statistically reliable* understanding of 91 Express Lanes customers' satisfaction, priorities, concerns and experiences as the pertain to OCTA and the 91 Express Lanes. Like similar customer surveys conducted on a periodic basis since 1998, the current survey provides the OCTA Board and staff with information that can be used to make sound, strategic decisions in a variety of areas, including planning, service delivery and enhancements, setting toll charges, and identifying effective marketing strategies.

To assist in this effort, OCTA selected True North Research to design the research plan and conduct the study. Broadly defined, the study was designed to:

- Profile customers' travel behavior on the 91 Express Lanes, including frequency and time of use, trip purposes, as well as origin and destination.
- Identify the relative importance that customers place on specific performance aspects/standards when traveling on the 91 Express Lanes.
- Measure customers' overall satisfaction with their 91 Express Lanes experiences, as well as how well they feel the 91 Express Lanes is meeting specific performance standards.
- Measure customers' perceptions of OCTA's management of the 91 Express Lanes.
- Identify customers' current exposure to OCTA's communications, as well as their preferences with respect to future communications efforts.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 57). In brief, a total of 1000 randomly selected 91 Express Lanes customers¹ participated in the survey between September 19 and September 26, 2011. The sample was stratified by relevant customer characteristics including frequency of using the Lanes, location of residence, and availability of contact information to ensure proper representation of customer subgroups. To encourage and maximize participation, a mixed-method data collection approach was employed whereby customers were provided the option to participate in the survey by telephone or through a secure, password-protected website hosted by True North. The telephone interviews averaged 15 minutes in length.

1. Customers were required to have used the 91 Express Lanes at least 12 times (once per month average) during the past year to qualify for inclusion in the study.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report, and a complete set of crosstabulations for the survey results is contained in Appendix A, which is bound separately.

ACKNOWLEDGEMENTS True North thanks Stella Lin and Nora Yeretian at OCTA for contributing their valuable input during the design stage of this study. Their collective experience, insight, and local knowledge improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of OCTA. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective public information campaigns. During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 600 survey research studies for public agencies, including more than 250 studies for California municipalities, special districts, and transportation planning agencies.



JUST THE FACTS

The following is an outline of the main factual findings from the 91 Express Lanes customer satisfaction survey. For the reader's convenience, we have organized the findings according to the section titles used in the body of this report. Thus, to learn more about a particular finding, simply turn to the appropriate report section.

FASTRAK DECISIONS

- The majority of customers (62%) indicated that they have only one FasTrak transponder in their household, while the remaining customers indicated that they had two (28%), three (6%), or at least four (4%) transponders.
- The most commonly reported method of acquiring their transponder was an in-store purchase at the Customer Service Center in Corona (40%), followed by telephone (33%), via the Internet (13%), the OCTA store in Orange (4%), or an alternative method (6%).
- The vast majority of customers (88%) reported that they *personally* pay for their toll charges, with an additional 4% indicating that their toll charges are paid by another member of their family. Overall, just 6% of customers indicated that their employer is primarily responsible for paying their toll charges, whereas 2% mentioned an alternative individual or entity.

USE OF 91 EXPRESS LANES

- Among all customers surveyed, the average number of *days* reported for using the 91 Express Lanes was 7.66 per month.
- Forty-two percent (42%) of 91 Express Lanes customers reported that they also use at least one other Southern California toll road in a typical month.
- Among *all* customers surveyed, the most commonly used alternative toll road was the 241 (35%), followed by the 261 (15%), 73 (12%), 133 (11%), and the Interstate 15 toll road (6%).
- Customers reported an average 4.19 one-way trips per week on the 91 Freeway.
- Customers reported an average 2.71 one-way trips per week on the 91 Express Lanes.
- Customers reported an average 2.17 midweek (Monday through Friday) one-way trips per week on the 91 Express Lanes.
- Customers reported an average 1.81 one-way trips per week on the 91 Express Lanes during rush hour periods.
- The most commonly reported *purposes* for trips made on the 91 Express Lanes were visiting friends and family (mentioned by 69% of all customers) and shopping or recreation trips (67%). Just under half (46%) of all customers indicated that they use the 91 Express Lanes for their work commute, whereas just 3% indicated that they use the Lanes for commuting to or from school.
- Among *work* trips that involve the 91 Express Lanes, three-quarters (75%) *originate* in Riverside County, 8% in Orange County, 7% in San Bernardino County, and 5% in Los Angeles County.
- More than half (58%) of *work* trips that involve the 91 Express Lanes are destined for Orange County, 22% for Los Angeles County, 7% for Riverside County, 2% for San Bernardino County, and 4% for an 'other' county.
- The pattern is more diverse for *non-work* trips made using the 91 Express Lanes. Although Riverside County is still the dominant county of origin (49%), the percentage of non-work trips that originate in Orange County (26%) and Los Angeles County (13%) is higher, whereas

San Bernardino County represents about the same percentage of work and non-work trip originations (7%).

- With respect to *non-work* trip destinations for trips made using the 91 Express Lanes, Orange County is the most popular destination (39%), followed by Riverside County (26%), Los Angeles County (14%), 'other' counties (6%), and San Bernardino County (4%).

OPINION OF 91 EXPRESS LANES

- An overwhelming majority (90%) of customers indicated that they were generally satisfied with their experiences when using the 91 Express Lanes, with more than half (51%) stating that they were *very* satisfied. A small portion of customers (9%) reported that they were dissatisfied, whereas 1% were unsure or unwilling to state their opinion.
- Satisfied customers were most apt to cite time savings or faster travel (29%) as the primary reason they were satisfied with the 91 Express Lanes, followed by the ability to bypass traffic (28%) and the ease of use/convenience offered by the Lanes (7%).
- Those who were generally dissatisfied with their experiences when using the 91 Express Lanes, on the other hand, were most likely to mention the expense of using the Lanes (9%) and the amount of traffic that exists on the toll road (6%) as the reasons for their position.
- When asked to rate 13 specific service standards in terms of their importance, customers rated saving time when they use the Lanes as the most important service standard (95%), followed by that the Lanes is a fast way to travel (93%), that their billing statements are accurate (90%), and that the Lanes are well-maintained and in good condition (89%).
- At the other end of the spectrum, customers rated as comparatively less important the use of tolls to help improve the 91 Freeway (61%), the reduction of wear and tear on their vehicle (66%), and the ease with which they can get in contact with a customer service representative (71%).
- When asked to rate how well the 91 Express Lanes are performing in meeting the same 13 service standards, customers expressed the highest levels of agreement that the Lanes allow them to save time (97%), followed by that they are a fast way to travel (96%), their billing statements are accurate (95%), and that the Lanes are well-maintained and in good condition (94%).
- Although still very high levels of agreement, fewer customers agreed that the convenience received from using the 91 Express Lanes is worth the cost (79%), that it is easy to get in touch with a customer service representative when needed (80%), and that the tolls they pay are used to help improve the 91 Freeway (81%).

PERFORMANCE NEEDS AND PRIORITIES

- Considering the importance that customers place on specific service standards and their perception of how well the Lanes are meeting these standards, the top priorities for improvement are strengthening the relationship between the perceived convenience and cost of the Lanes, making it easier to get in touch with a customer service representative, and increasing the perceived use of tolls to improve the 91 Freeway.
- Among all customers who reported a perceived time savings, the average perceived time savings when using the 91 Express Lanes during *morning* rush hour was 27.58 minutes.
- Among all customers who reported a perceived time savings, the average perceived time savings when using the 91 Express Lanes during the *afternoon* rush hour was 34.24 minutes.

IMPROVEMENTS TO 91 EXPRESS LANES

- When asked what one aspect of the 91 Express Lanes toll road or service they would want to improve most, the most common change that customers mentioned was a desire for reduced fees (34%), followed by extending the Express Lanes (16%), decreasing the wait times for customer service (8%), and improved prevention of illegal lane changes (5%). It is worth noting, moreover, that nearly one in five customers (19%) indicated that no changes were needed or that they could not think of a needed change for the 91 Express Lanes.
- When the 91 Express Lanes are extended to connect with Interstate 15, 72% of existing customers anticipate using the extended section of the Lanes in both directions, 6% expect to use the section only when traveling east, 1% anticipate using the new section only when traveling west, whereas 19% do not expect to use the extension and 1% are unsure.
- Overall, 54% of customers indicated that they support the proposed direct connection between the 91 Express Lanes and the 241 toll road, 8% opposed the project, whereas 35% stated that they do not have an opinion.
- A majority (56%) of 91 Express Lanes customers indicated that they support the policy of setting the toll charge high enough to keep traffic free flowing, whereas 28% opposed this policy and 17% were unsure or unwilling to share their opinion.
- If the toll charge were reduced just before and after rush hour periods, most customers (54%) stated that they would alter their travel schedule to realize the savings, whereas 37% indicated that they would not alter their travel behavior and 10% were unsure or unwilling to share their opinion.

OCTA AND COMMUNICATION

- Eighty percent (80%) of customers indicated that they were aware that OCTA is responsible for managing the 91 Express Lanes, whereas 19% stated that they did not know the Lanes were managed by OCTA, and 1% were unsure.
- More than two-thirds of customers agreed that *OCTA does a good job communicating with me about the 91 Express Lanes through newsletters, billing inserts, emails, signs and other methods* (83%, 4% unsure) and that *OCTA is financially responsible when managing the 91 Express Lanes* (70% agree, 23% unsure).
- Overall, 57% of customers agreed that *OCTA should use excess toll revenues to repay the construction costs as soon as possible so it can make the 91 Express Lanes free*, whereas 33% disagreed with this statement and 9% were unsure or unwilling to share their opinion.
- When asked how they prefer to receive information about the 91 Express Lanes, email was by far the most popular method among existing customers (70%), followed by direct mail (37%). Electronic message signs, road signs, and a website were also mentioned by 11%, 9% and 7% of customers, respectively.²
- Most customers (54%) indicated that they would prefer to continue receiving their *billing statements* by mail in the future, 36% indicated that they would prefer to receive their statement via email, 5% preferred to be able to check their statement online, whereas 4% were unsure or unwilling to answer the question.
- Overall, the average total monthly toll charge reported by 91 Express Lanes customers surveyed in this study was \$57.55.

2. Multiple responses were allowed.

- Just over half (51%) of customers indicated that they were aware that the 91 Express Lanes toll charge had been reduced in the 12 months prior to the interview, whereas 46% stated that they were not aware of the reduction and 3% were unsure.

BACKGROUND & DEMOGRAPHICS The following table presents the demographic profile of 91 Express Lanes customers overall, as well as the profile for high-frequency users (3+ trips per week using the Lanes).

TABLE 1 DEMOGRAPHICS OF CUSTOMERS OVERALL AND HIGH-FREQUENCY USERS

	All Customers	High Frequency Users (3+ Trips Per Week)
<i>Total Respondents</i>	1000	174
QD1 Gender		
Male	47.7	54.9
Female	51.0	44.7
Prefer not to answer	1.3	0.4
QD2 Age		
18 to 24	1.0	0.0
25 to 34	6.5	8.2
35 to 44	13.0	22.1
45 to 54	23.2	24.9
55 to 64	25.2	25.4
65 and older	20.1	9.9
Prefer not to answer	10.9	9.4
QD3 Employment status		
Employed full time	60.5	76.4
Employed part time	6.4	2.0
Student	1.6	0.8
Homemaker	3.6	2.4
Retired	23.1	11.0
Between jobs	2.3	2.2
Prefer not to answer	2.5	5.0
QD4 Education level		
Some high school	2.4	3.6
High school grad	10.4	10.0
Tech / Voc	3.5	4.3
Some college	28.0	30.0
College grad	26.5	30.5
Some grad school	4.1	5.1
Graduate degree	20.4	12.1
Prefer not to answer	4.7	4.4
QD7 Household income		
Less than \$25K	2.0	0.9
\$25K to \$49K	6.9	6.3
\$50K to \$74K	14.2	15.0
\$75K to \$99K	17.0	17.6
\$100K to \$149K	19.5	28.2
\$150K to \$199K	10.5	9.2
\$200K or more	6.1	4.3
Not sure	2.4	2.5
Prefer not to answer	21.4	16.1



CONCLUSIONS

As noted in the *Introduction*, this study was designed to provide OCTA with a statistically reliable understanding of 91 Express Lanes customers' satisfaction, priorities, concerns and experiences as they pertain to OCTA and the 91 Express Lanes. As such, it can provide the OCTA Board and staff with information that can be used to make sound, strategic decisions in a variety of areas, including planning, service delivery and enhancements, setting toll charges, and identifying effective marketing strategies. Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

The following conclusions are based on the True North's interpretations of the results, as well as the firm's collective experience conducting similar studies for government agencies throughout the State.

How are customers using the 91 Express Lanes?

Perhaps the most basic objective of this study was to develop an up-to-date understanding of how 91 Express Lanes customers are using the 91 Express Lanes, including how *often* they use the Lanes, *when* they typically use the Lanes, for what *purposes* they use the Lanes, as well as *where* they typically originate and end their trips.

The average 91 Express Lanes customer makes 4.19 one-way trips per week on the 91 Freeway, 2.71 of which involve using the 91 Express Lanes. Although most of these trips on the 91 Express Lanes occur midweek (2.17) and during rush hour periods (1.81), it is important to recognize that nearly one-third of all trips occur outside of the midweek, rush hour periods. When compared to the number of weekly one-way trips reported during the heart of the economic recession in 2009, the average number of trips reported on the 91 Express Lanes in 2011 increased by nearly 0.61 trips.

Although there is a tendency for some to focus on the 91 Express Lanes as a tool for commuters, the reality is that customers use the 91 Express Lanes for more than just their daily commute. In fact, more than two-thirds of customers indicated that they use the 91 Express Lanes when visiting friends or family, *and* for shopping and/or recreation trips. By comparison, less than half (46%) of 91 Express Lanes customers indicated that they use the Lanes for their work commute, and just 3% indicated that they use the Lanes for commuting to or from school.

Differences in trip *purpose* correspond with pronounced differences in the origins and destinations for trips made on the 91 Express Lanes. Approximately three out of every four work-related trips (75%) begin in Riverside County, and more than half of all work-related trips (58%) are destined for Orange County. By comparison, non-work trips are more

diverse in where they begin and end, with less than half (49%) originating in Riverside County and 39% concluding in Orange County.

The aforementioned findings point to an important fact about 91 Express Lanes customers—they are a diverse group. Although it is instructive to examine the behaviors of the *average* 91 Express Lanes customer, the reality is that it is arguably even more important to appreciate that customers vary widely in their frequency and timing of using the Lanes, their use of alternative toll roads, and trip purposes. For example, long-time 91 Express Lanes customers (8+ years) were nearly twice as likely as relative new comers (less than 2 years) to *also* use alternative toll roads in Southern California. With respect to trip purposes, residents of Riverside County and San Bernardino County were nearly twice as likely to report using the 91 Express Lanes for work trips when compared to their respective counterparts in Orange and Los Angeles counties. Differences in how customers use the 91 Express Lanes—and especially how *often* they use the Lanes—can lead to substantial variation in the perceived value of the Lanes (more on this topic later in this section).

How do customers prioritize among various performance standards for the 91 Express Lanes?

In addition to profiling customers' use of the 91 Express Lanes, the survey also sought to gauge the relative importance that customers place on specific performance aspects/standards when traveling on the 91 Express Lanes. In other words, what matters *most* to customers when they choose to travel on the 91 Express Lanes?

Of 13 specific performance standards tested, customers prioritized the following standards: saving time, traveling fast, accurate billing statements, and a road that is well-maintained. At least 89% of customers surveyed indicated that these were either extremely or very important performance standards, and by extension are the dominant factors in how they evaluate the overall performance of the 91 Express Lanes.

At the other end of the spectrum, customers placed considerably less importance on the ease with which they can get in touch with a customer service representative, that using the Lanes reduces the wear-and-tear on their vehicle, and that the tolls they pay are used to help improve the 91 Freeway.

How well are the 91 Express Lanes meeting customers' needs?

Overall, the 91 Express Lanes (and OCTA) are doing an excellent job meeting customers' needs and expectations. From an *overall performance rating* perspective, 90% of customers indicated that they were satisfied with their experiences when using the 91 Express Lanes, with more than half (51%) stating that they were *very* satisfied. Satisfaction was also widespread among customers, exceeding 75% in *every* identified subgroup regardless of frequency of use, trip purposes, length of time being a customer, county of residence, or a variety of demographic

characteristics. It is also worth noting that overall satisfaction with the 91 Express Lanes appears to have increased slightly during the past two years.³

The high levels of satisfaction expressed by customers with respect to the 91 Express Lanes' overall performance were also generally echoed within each of the 13 specific performance standards tested in the study. The Lanes are meeting the performance expectations of at least 79% of customers for every performance standard tested, and at least 90% of customers for the majority of standards tested. Moreover, the Lanes are performing *best* on the aspects that matter most to customers: saving time, being a fast way to travel, accurate billing statements, and having a well-maintained road.

What are the best opportunities for improving overall customer satisfaction?

Perhaps the most important recommendation, and one that is occasionally overlooked in customer satisfaction research, is for OCTA to recognize the many things that it does exceptionally well and to focus on continuing to perform at a high level in these areas. As noted throughout this report, customers expressed high levels of satisfaction regarding the 91 Express Lanes and have a favorable opinion of the Lanes performance in most respects. The top priority for OCTA should thus be to do what it takes to maintain the high quality of service on that it currently provides on the 91 Express Lanes.

However, as OCTA continues to strive for improvement, the results of this study do suggest opportunities to further bolster customer satisfaction. Considering the list of performance standards and their respective priority status (see *Performance Needs & Priorities* on page 33), as well as customers' open-ended responses about ways the 91 Express Lanes road and customer service can be improved (see *Improvements to 91 Express Lanes* on page 38), the top candidates for improvement are: improving the relationship between the perceived convenience and cost of the Lanes (i.e., overall value), completing the extension of the 91 Express Lanes to Interstate 15, making it easier to reach a customer service representative, building a direct connection between the 91 Express Lanes and the 241 toll road, and increasing the perceived use of tolls to improve the 91 Freeway.

More specifically, the results of the survey indicate that OCTA may want to develop a targeted set of strategies for addressing the needs and perceptions of *high-frequency* customers.⁴ One of the more striking pat-

3. Eighty-seven percent (87%) of respondents in 2009 reported being satisfied with their experiences using the 91 Express Lanes, compared to 90% in 2011. However, it should be noted that the structure of the question was changed from a seven-point numerical scale in 2009 to a four-point verbal scale in 2011, which could have a slight impact on the comparability of the results.

4. For the purposes of this study, high-frequency users are defined as taking at least seven one-way trips per week using the 91 Express Lanes.

terns in the survey was that the more frequently a customer uses the 91 Express Lanes, the *less* likely they were to be very satisfied with their experiences using the Lanes. Similarly, dissatisfaction with the Lanes was strongly related to the amount a customer pays in an average month. Satisfied customers reported paying an average \$53.21 per month for 91 Express Lanes' toll charges, whereas the corresponding figure among dissatisfied customers was \$89.82.

High-frequency users' sensitivity to the cost of using the 91 Express Lanes was found in other aspects of the study as well. Whereas *every other* identified subgroup clearly supported the concept of setting the toll fee high enough to keep traffic free flowing on the Lanes, high-frequency users opposed this policy. They were also the only subgroup that was clearly unwilling (or unable) to change their travel times to take advantage of an off-peak toll reduction strategy designed to encourage customers to travel before or after rush hour periods.

Considering their apparent inflexibility with respect to travel times, one strategy for improving the value of the 91 Express Lanes for high-frequency users would be to develop a graduated toll structure for these individuals. In other words, beyond a certain monthly trip threshold, the charge for using the toll roads could be discounted. A flat-fee monthly subscription may also be popular with high-frequency users. In addition to improving the value that these important customers perceive in using the 91 Express Lanes, the aforementioned programs may also have the potential to increase the total revenues to OCTA by encouraging greater use of the 91 Express Lanes and/or adoption of a higher monthly subscription fee.

Are customers supportive of OCTA's management of the Lanes?

More than 80% of 91 Express Lanes customers were aware that the Lanes are owned and managed by OCTA, and they generally have a high opinion of OCTA's performance in this respect.

The litmus test for measuring OCTA's performance in managing the 91 Express Lanes is simple: what percentage of customers are satisfied with their experiences when using the Lanes? As noted above, this percentage is very high (90%). Of course, customers can also comment on more narrowly defined aspects of OCTA's performance, including the Authority's efforts to communicate with customers and its management of funds. In these respects as well, customers generally held a high opinion of OCTA's performance. Customers who *agreed* that OCTA does a good job communicating with them about the Lanes outnumbered those who disagreed by nearly seven to one (7:1), and those who felt that OCTA is financially responsible outnumbered those who did not by approximately sixteen to one (16:1).

Have customers' communication preferences changed?

One of the more compelling trends identified in this study is the apparent evolution of 91 Express Lanes customers' preferences with respect to how OCTA can best communicate with them regarding the Lanes. Since 2007, there has been a pronounced shift in customers' preferences away from direct mail in favor of email. Whereas 44% of customers in 2007 preferred email, a preference for email communications in the current study was found among 70% of customers. Even among seniors—a group that usually favors traditional mail—email was the preferred method by which customers desired to receive information about the 91 Express Lanes.

Although 91 Express Lanes customers prefer email for general information about the Lanes, it should be noted that they do not extend this preference to *billing statements*. Most customers (54%) prefer that their billing statements continue to be sent via conventional mail.

FASTRAK DECISIONS

The opening series of questions in the survey were designed to profile 91 Express Lanes customers with respect to the number of FasTrak transponders in their household, the method by which they acquired the transponders, as well as the individuals or entities responsible for paying their toll charges.

NUMBER OF TRANSPONDERS IN THE HOUSEHOLD The first question in this series asked customers to identify the number of FasTrak transponders they currently have in their household. As shown in Figure 1 below, the majority of customers (62%) indicated that theirs is the only transponder in their household, with the remaining customers indicating that they had two (28%), three (6%), or at least four (4%) transponders. For the interested reader, Figure 2 shows how the number of transponders per household has fluctuated during the past five survey cycles.

Question 2 *How many FasTrak transponders do you currently have in your household?*

FIGURE 1 NUMBER OF FASTRAK TRANSPONDERS IN HOUSEHOLD

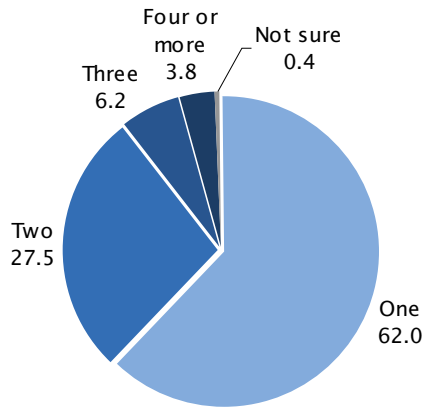
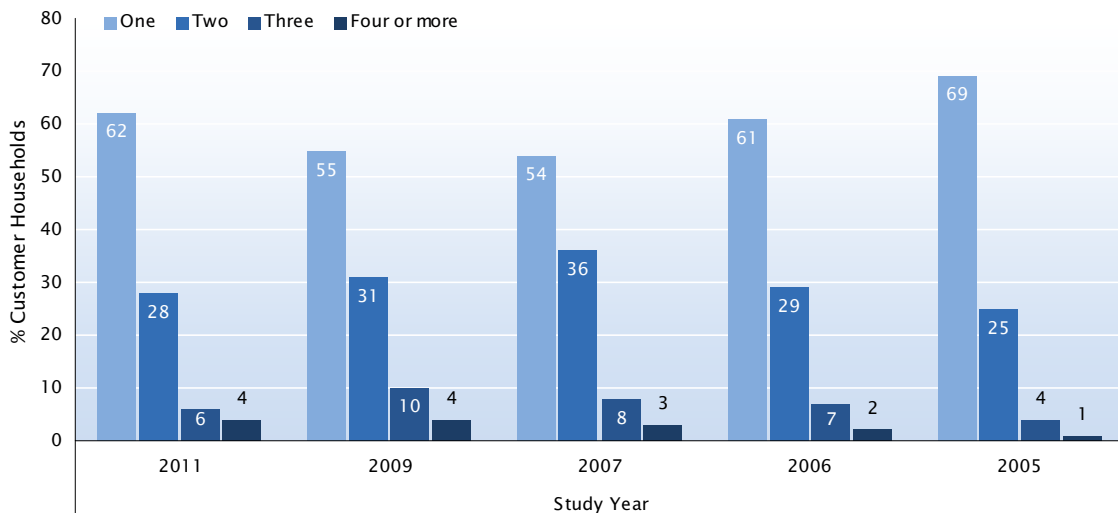


FIGURE 2 NUMBER OF FASTRAK TRANSPONDERS IN HOUSEHOLD BY STUDY YEAR



METHOD OF ACQUISITION All customers were next asked to describe *how* they acquired the FasTrak responder that they use when traveling on the 91 Express Lanes. The most commonly reported method of acquisition was an in-store purchase at the Customer Service Center in Corona (40%), followed by telephone (33%), via the Internet (13%), the OCTA store in Orange (4%), or an alternative method (6%) (Figure 3). Interestingly, the methods by which customers acquired their transponders varied substantially by the length of time that they have used the 91 Express Lanes. As shown in Figure 4, reliance on the Customer Service Center in Corona and telephone orders was far more common among longtime customers (8+ years), whereas customers who acquired their transponders more recently (last two years) have made much greater use of the Internet for this purpose.

Question 3 *How did you acquire the FasTrak transponder you use when traveling on the 91 Express Lanes? Did you pick it up in person at the OCTA store in Orange, in person at the Customer Service Center in Corona, order it by phone and have it mailed to you, or did you order it over the Internet?*

FIGURE 3 METHOD OF ACQUIRING FASTRAK TRANSPONDER

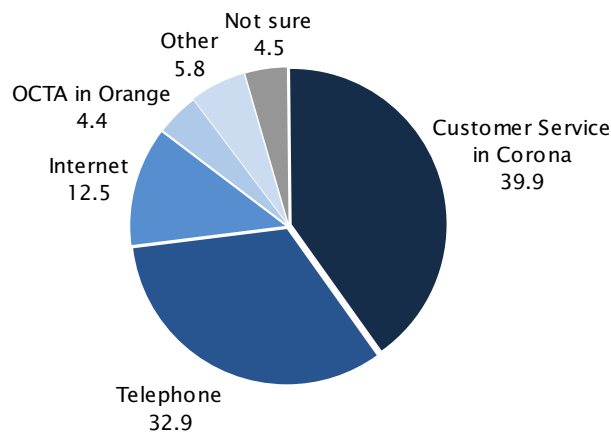
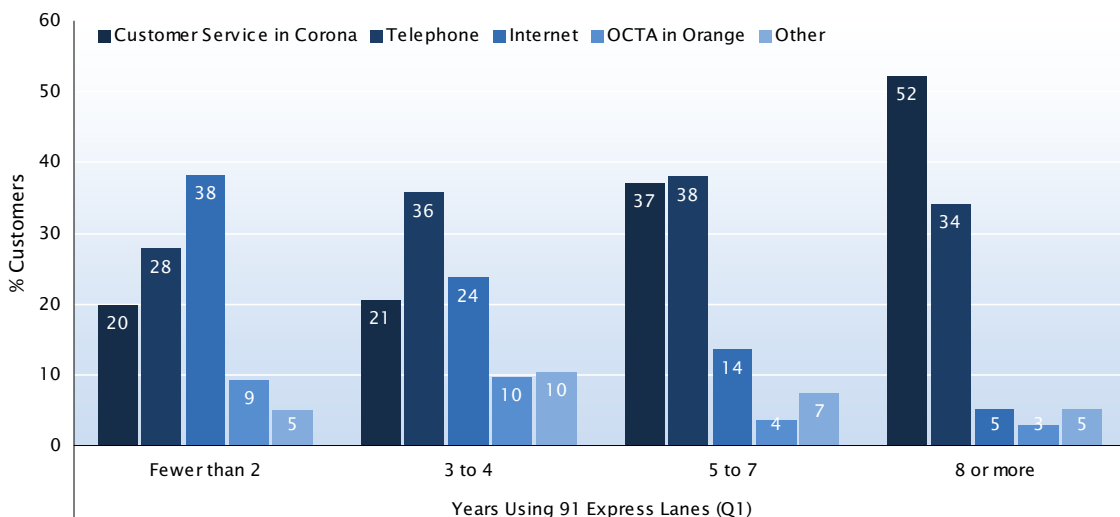


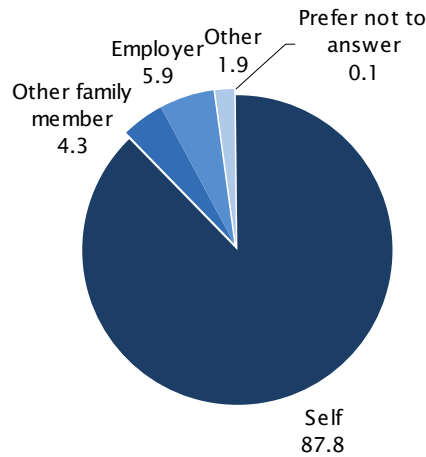
FIGURE 4 METHOD OF ACQUIRING FASTRAK TRANSPONDER BY YEARS USING 91 EXPRESS LANES



WHO PAYS YOUR TOLL CHARGES? The final question in this series asked respondents to identify who pays their toll charges when they use the 91 Express Lanes. The vast majority of customers (88%) reported that they *personally* pay for their toll charges, with an additional 4% indicating that their toll charges are paid by another member of their family. Overall, just 6% of customers indicated that their employer is primarily responsible for paying their toll charges, whereas 2% mentioned an alternative individual or entity.

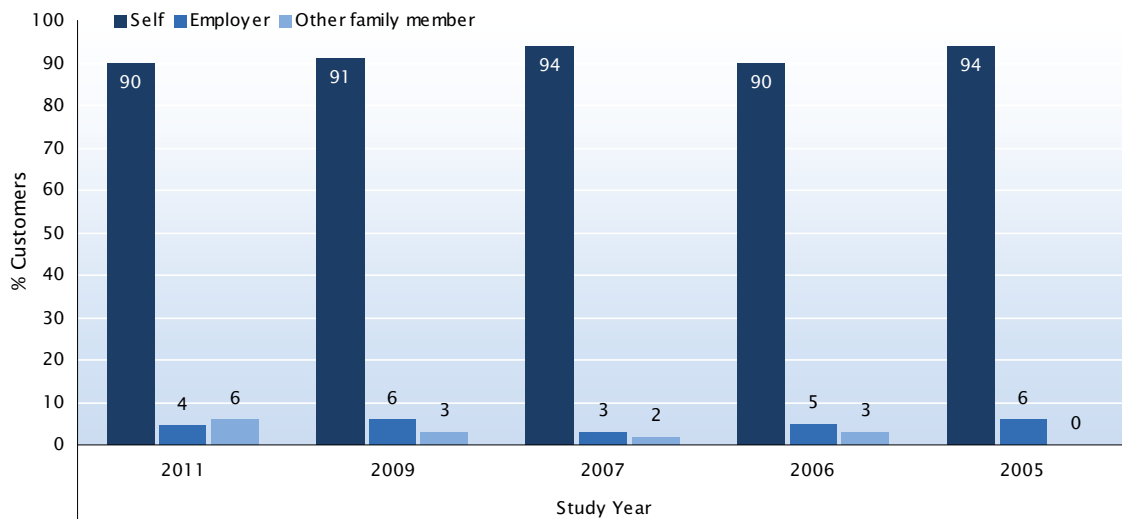
Question 4 Which of the following best describes who pays your toll charges when you use the 91 Express Lanes?

FIGURE 5 WHO PAYS TOLL CHARGES



Recalculating the percentages to capture the top three named sources for comparability with prior surveys,⁵ Figure 6 shows that there has been a striking pattern of consistency over time with respect to *who* pays customers' toll charges for using the 91 Express Lanes.

FIGURE 6 WHO PAYS TOLL CHARGES BY STUDY YEAR



5. Prior survey reports occasionally did not display an 'other' category.

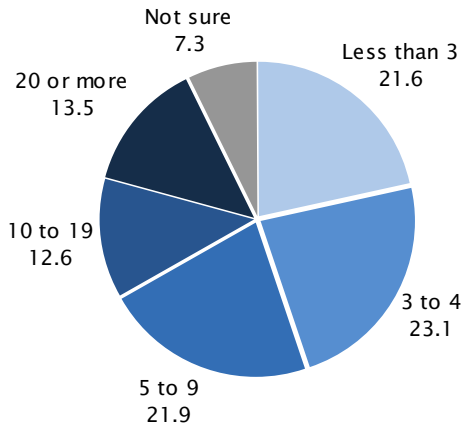
USE OF 91 EXPRESS LANES

One of the central objectives of this study was to profile customers' use of the 91 Express Lanes, including how *often* they use the Lanes, *when* they typically use the Lanes, for what *purposes* they use the Lanes, as well as *where* they typically originate and end their trips. The answers to these and related topics are provided in this section.

MONTHLY FREQUENCY OF USING THE 91 EXPRESS LANES All customers were initially asked to describe the number of *days* in a typical month that they use the 91 Express Lanes toll road. The sampling design for the survey used frequency of use as one of the stratifying criteria, which ensures that the distribution shown in Figure 7 is representative of 91 Express Lanes customers who use the Lanes at least once per month on average. As shown in the figure, customers varied substantially in the number of days per month they use the Lanes, with 45% using them four or fewer days per month, approximately one-third (35%) using the Lanes between 5 and 19 days per month, and 14% using the 91 Express Lanes at least 20 days per month. An additional 7% were unsure.

Question 5 *In a typical month, how many days do you use the 91 Express Lanes toll road?*

FIGURE 7 DAYS PER MONTH USING 91 EXPRESS LANES



Among all customers surveyed, the average number of days reported for using the 91 Express Lanes was 7.66 per month. However, as shown in Figures 8-10, this average varied substantially by certain customer demographics including age, employment status, ethnicity, and county of residence. When compared to their respective counterparts, customers between the ages of 35 and 44, full-time employees, Latinos, and residents of Riverside and San Bernardino counties reported the highest average number of days per month using the 91 Express Lanes.

FIGURE 8 AVERAGE DAYS PER MONTH USING 91 EXPRESS LANES BY AGE, GENDER & EMPLOYED FULL TIME

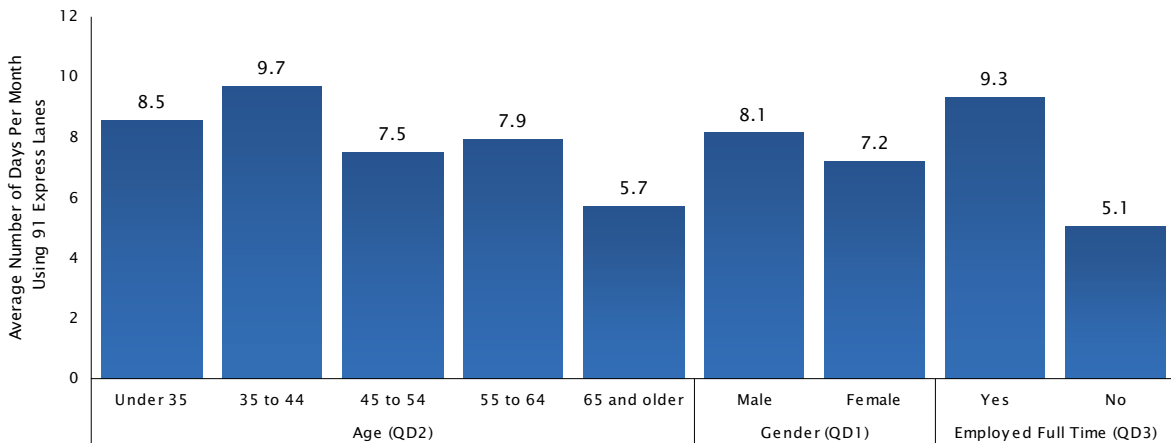


FIGURE 9 AVERAGE DAYS PER MONTH USING 91 EXPRESS LANES BY HOUSEHOLD INCOME & EDUCATION LEVEL

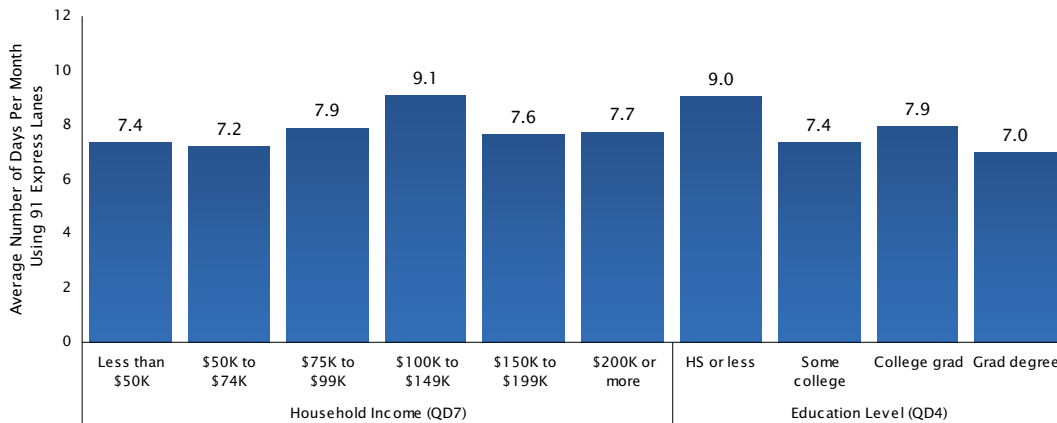
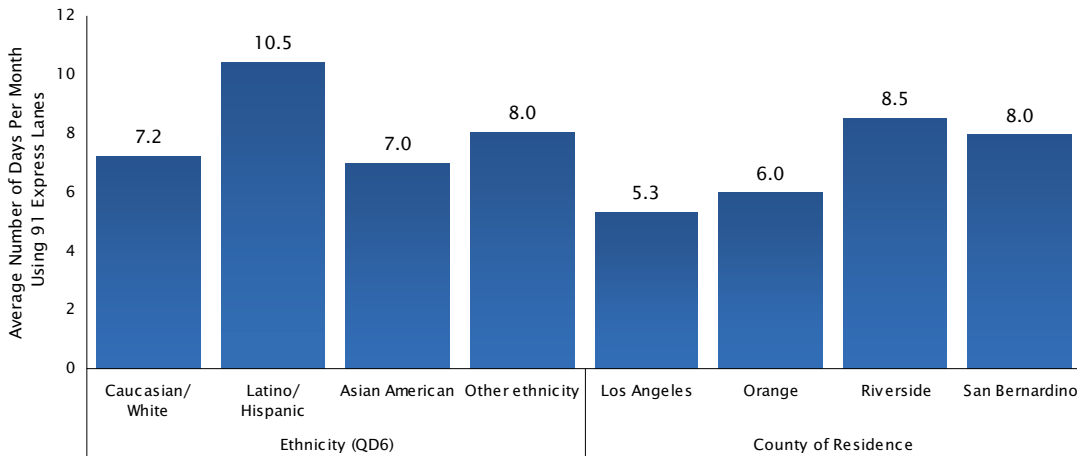


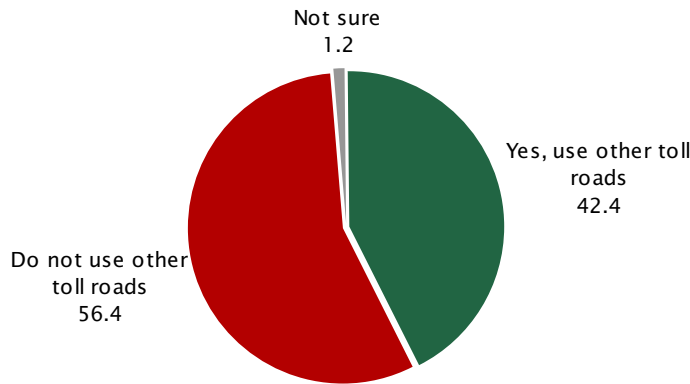
FIGURE 10 AVERAGE DAYS PER MONTH USING 91 EXPRESS LANES BY ETHNICITY & COUNTY OF RESIDENCE



DO YOU USE OTHER TOLL ROADS IN SOUTHERN CALIFORNIA? Although the survey focused on customers' experiences using the 91 Express Lanes, OCTA was also interested in understanding the extent to which 91 Express Lanes customers also use other toll roads in Southern California. As shown in Figure 11 on the next page, 42% of 91 Express Lanes customers reported that they use at least one other Southern California toll road in a typical month. The tendency to use other toll roads in addition to the 91 Express Lanes was *strongly* related to several factors, including the length of time that a respondent had been a 91 Express Lanes customer, employment status, and county of residence (see Figure 12). Long-time customers (8+ years), full-time employees, and residents of Orange and Riverside counties were substantially more likely than their respective counterparts to report using toll roads in addition to the 91 Express Lanes.

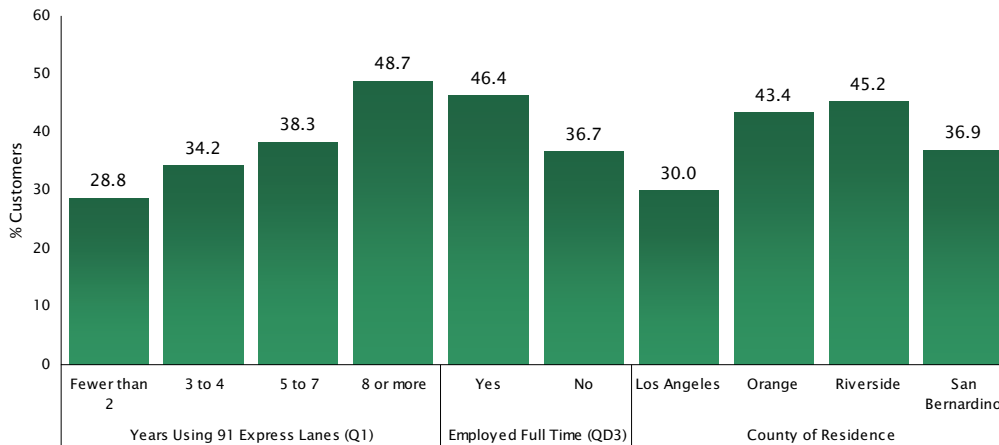
Question 6 *In a typical month, do you use any other toll roads in Southern California?*

FIGURE 11 USE OTHER TOLL ROADS IN SOUTHERN CALIFORNIA



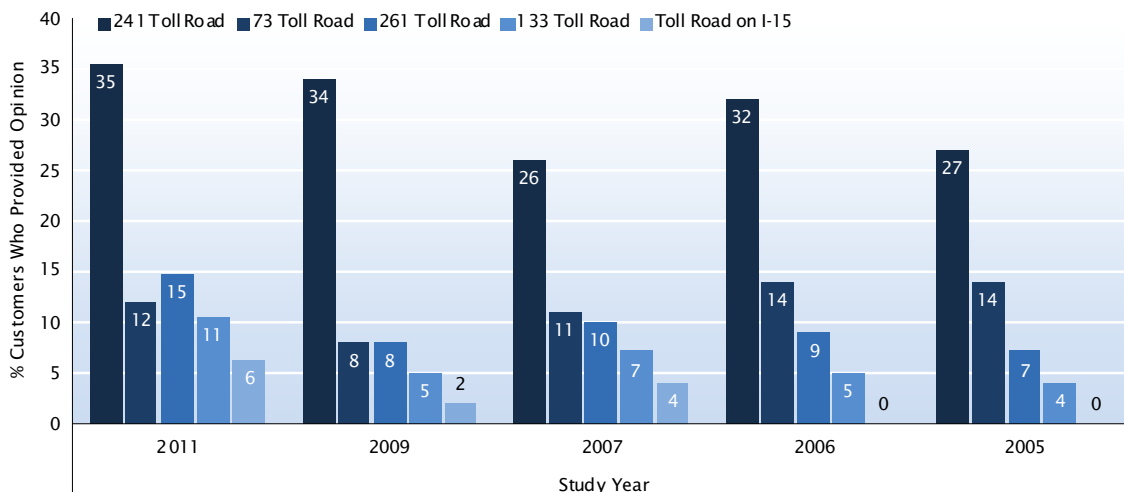
Among *all* customers surveyed, the most commonly used alternative toll road was the 241 (35%), followed by the 261 (15%), 73 (12%), 133 (11%), and the Interstate 15 toll road (6%). Figure 13 shows how these patterns have changed since 2005.

FIGURE 12 USE OTHER TOLL ROADS IN SOUTHERN CALIFORNIA BY YEARS USING 91 EXPRESS LANES, EMPLOYED FULL TIME & COUNTY OF RESIDENCE



Question 7 *Which other toll roads do you use in a typical month?*

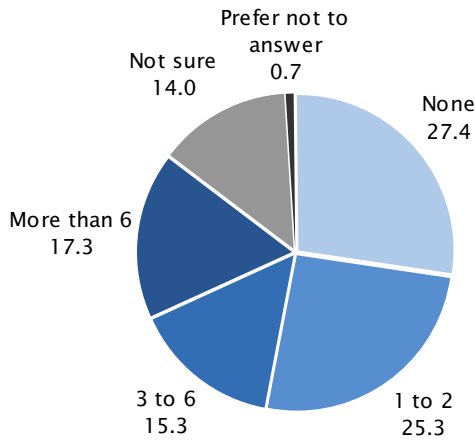
FIGURE 13 OTHER SOUTHERN CALIFORNIA TOLL ROADS USED BY STUDY YEAR



WEEKLY TRAVEL ON 91 FREEWAY Whereas Question 5 asked about the number of days per month a customer uses the 91 Express Lanes, at this point the survey transitioned to asking a series of questions that focused on the number of *one-way trips* that customers make in a typical week. The first question in this series (Question 8) simply asked how many total one-way trips the customer typically makes on the 91 Freeway per week, inclusive of trips in which they use the 91 Express Lanes. Approximately 17% of customers indicated that they make at least seven trips per week, 15% make three to six trips per week, one-quarter (25%) make one to two trips in a typical week, whereas 27% indicated that they do not use the 91 Freeway in a typical week and 15% were unsure or unwilling to answer the question (Figure 14).

Question 8 *In a typical week, how many one-way trips do you take on the 91 Freeway? Please count all trips, including trips when you use the 91 Express Lanes toll road and those when you don't.*

FIGURE 14 NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 FREEWAY



Overall, customers reported an average 4.19 trips per week on the 91 Freeway in 2011, which is greater than the number of trips reported in prior studies (see Figure 15). Moreover, when compared to their respective counterparts, customers between the ages of 35 and 44, males, full-time employees, those whose annual household income is \$200,000 or greater, college graduates, Latinos, and residents of Riverside County reported the greatest average number of one-way trips on the 91 Freeway in a typical week (see Figures 15-17).

FIGURE 15 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 FREEWAY BY STUDY YEAR & AGE

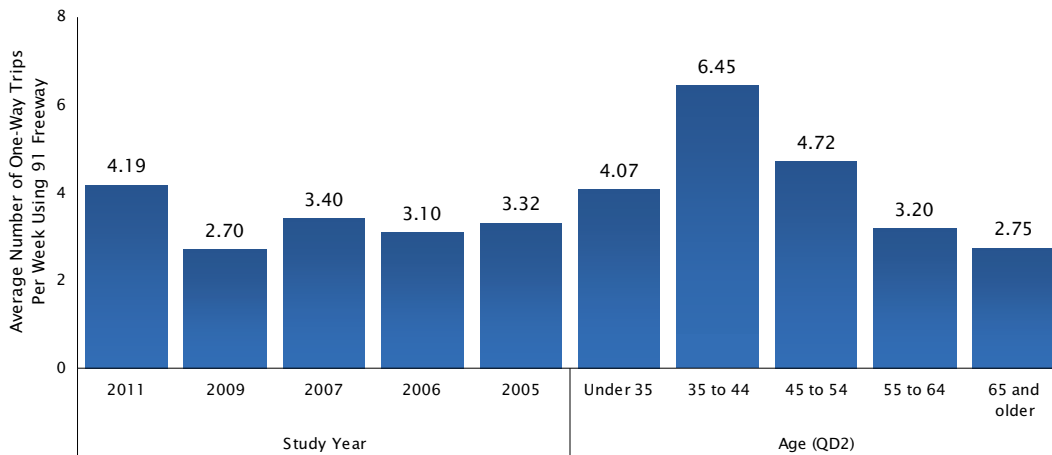


FIGURE 16 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 FREEWAY BY GENDER, EMPLOYED FULL TIME & HOUSEHOLD INCOME

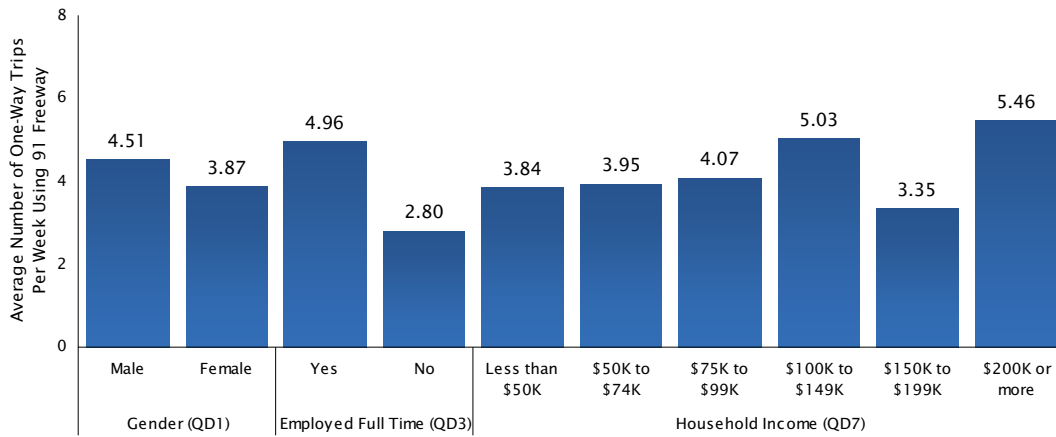
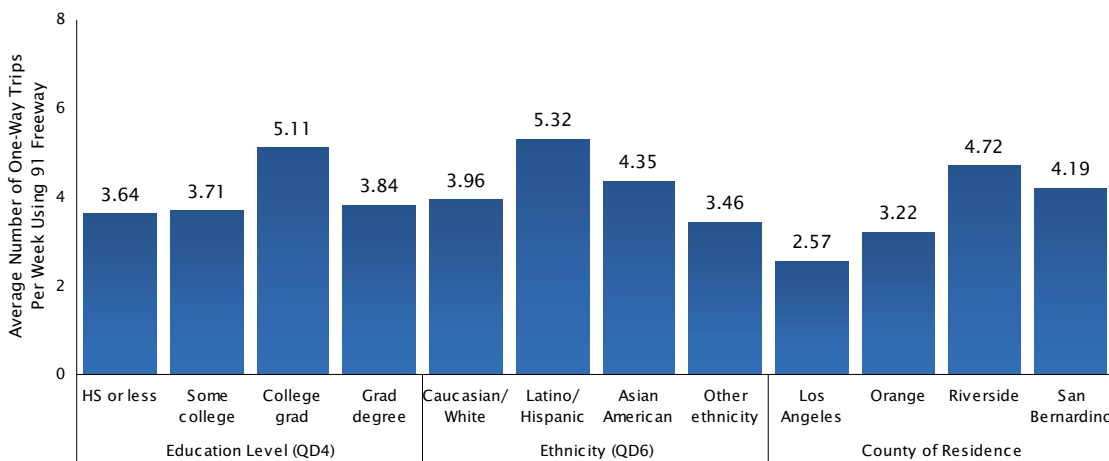


FIGURE 17 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 FREEWAY BY EDUCATION LEVEL, ETHNICITY & COUNTY OF RESIDENCE



WEEKLY TRAVEL ON 91 EXPRESS LANES Having established the number of one-way trips a customer makes on the 91 Freeway in a typical week, the survey next asked respondents to identify the number of these trips that involved the 91 Express Lanes toll road. Approximately 8% of customers indicated that they make at least seven trips per week on the 91 Express Lanes, 14% make three to six trips in a typical week, 30% make one to two trips per week, whereas 30% indicated that they do not use the 91 Express lanes in a typical week and 19% were unsure or unwilling to answer the question (Figure 18).

Overall, customers reported an average 2.71 trips per week on the 91 Express Lanes in 2011, which is greater than the number of trips reported in the prior two surveys (2009 and 2007). Moreover, when compared to their respective counterparts, customers between the ages of 35 and 44, full-time employees, college graduates, Latinos, and residents of San Bernardino County reported the greatest average number of one-way trips on the 91 Express Lanes in a typical week (see Figures 19-21).

Question 9 Of the <trips from Q8> one-way trips you take on the 91 Freeway in a typical week, approximately how many do you use the 91 Express Lanes toll road?

FIGURE 18 NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES

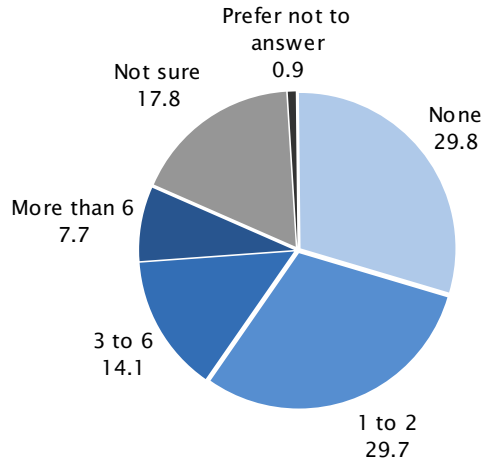


FIGURE 19 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES BY STUDY YEAR & AGE

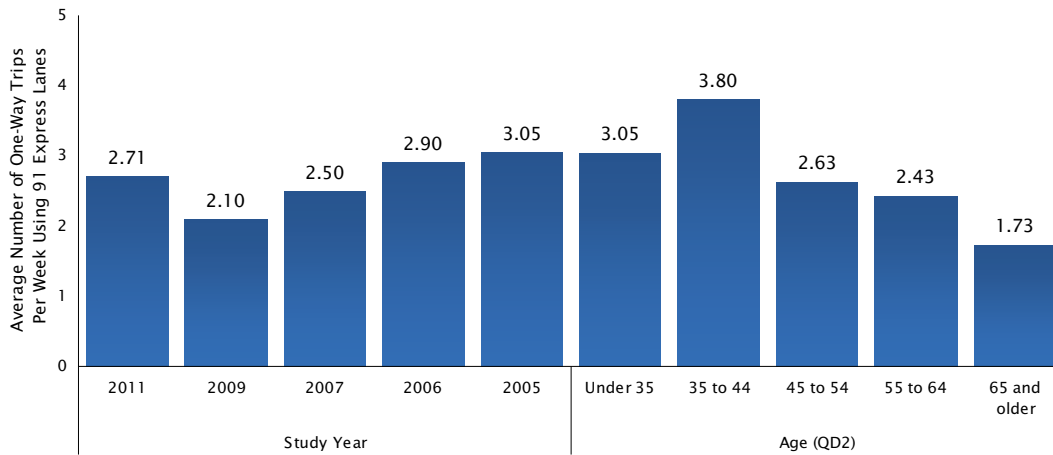


FIGURE 20 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES BY GENDER, EMPLOYED FULL TIME & HOUSEHOLD INCOME

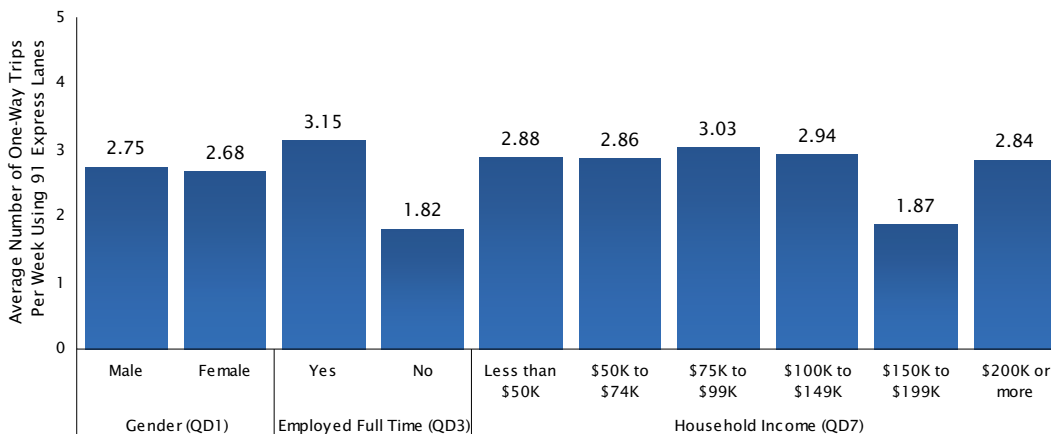
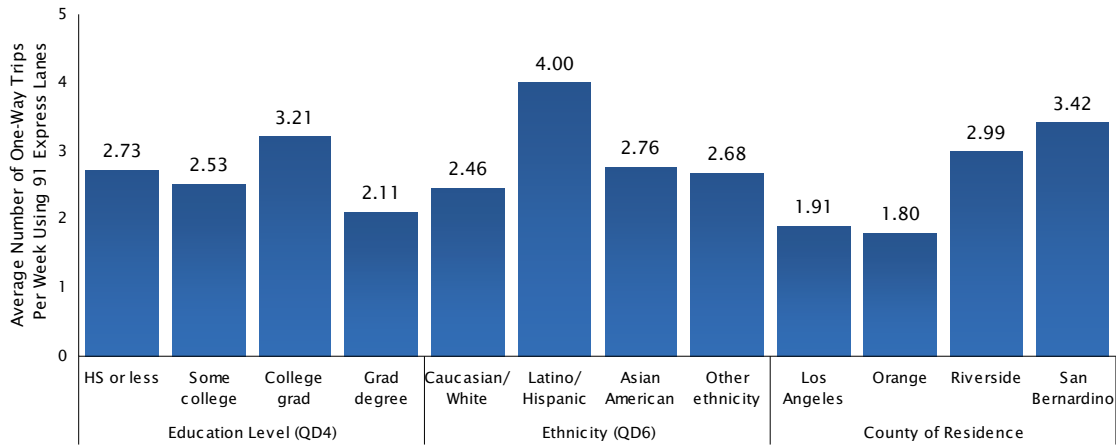


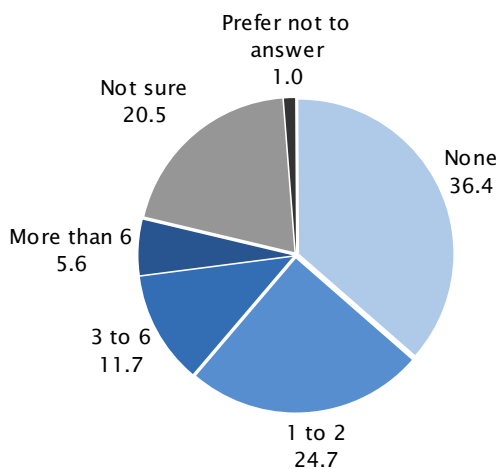
FIGURE 21 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES BY EDUCATION LEVEL, ETHNICITY & COUNTY OF RESIDENCE



WEEKDAY TRAVEL ON 91 EXPRESS LANES Similar to Question 9, Question 10 next asked respondents to identify the number of their weekly 91 Express Lanes trips that occur *mid-week*, Monday through Friday. Approximately 6% of customers indicated that they make at least seven midweek trips per week on the 91 Express Lanes, 12% make three to six midweek trips in a typical week, 25% make one to two trips per week, whereas 36% indicated that they do not use the 91 Express lanes Monday through Friday in a typical week and 22% were unsure or unwilling to answer the question (Figure 22).

Question 10 *Of the <trips from Q9> one-way trips you use the 91 Express Lanes toll road in a typical week, how many do you take Monday through Friday?*

FIGURE 22 NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES, MON TO FRI



Overall, customers reported an average 2.17 mid-week trips per week on the 91 Express Lanes in 2011.⁶ When compared to their respective counterparts, customers between the ages of 35 and 44, full-time employees, those from households that earn less than \$150,000 annually, college graduates, Latinos, and residents of San Bernardino County reported the greatest average number of one-way trips on the 91 Express Lanes between Monday and Friday in a typical week (see Figures 23-26).

6. The manner in which Questions 10 and 11 were asked in 2011 is somewhat different than in prior years, which is why comparisons to prior survey results are not presented for these questions.

FIGURE 23 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES, MON TO FRI BY AGE, GENDER & EMPLOYED FULL TIME

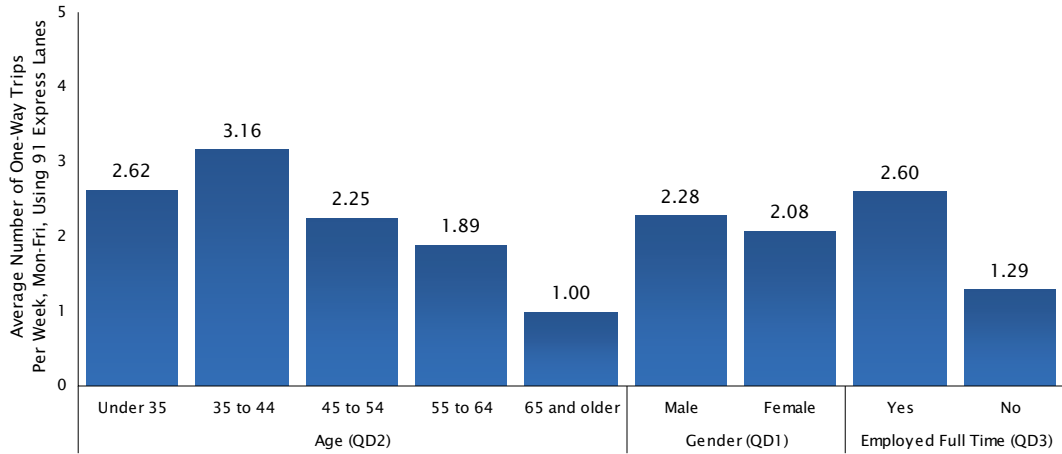


FIGURE 24 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES, MON TO FRI BY HOUSEHOLD INCOME & EDUCATION LEVEL

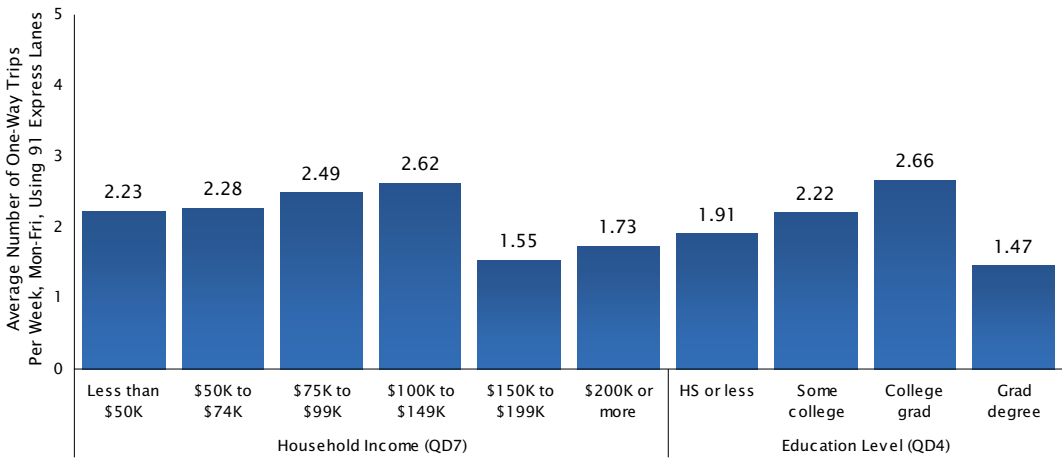
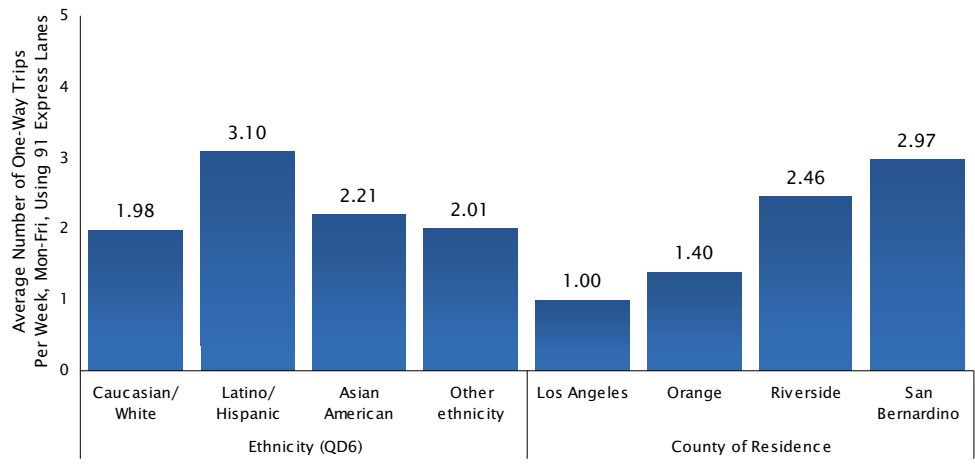


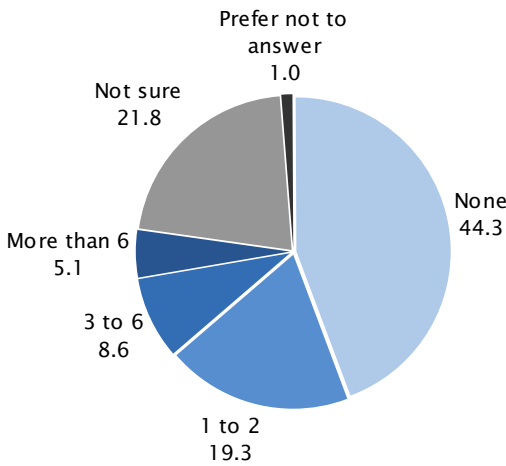
FIGURE 25 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES, MON TO FRI BY ETHNICITY & COUNTY OF RESIDENCE



RUSH HOUR TRAVEL ON 91 EXPRESS LANES Having identified the number of *mid-week* trips a respondent typically makes using the 91 Express Lanes, the survey next asked respondents to estimate how many of these trips occur during rush hour periods between 5AM and 9AM, or 3PM and 7PM. Approximately 5% of customers indicated that they make at least seven trips per week on the 91 Express Lanes during rush hour periods, 9% make three to six midweek trips during rush hour in a typical week, 19% make one to two trips per week during rush hours, whereas 44% indicated that they do not use the 91 Express lanes during rush hour periods in a typical week and 23% were unsure or unwilling to answer the question (Figure 26).

Question 11 *Of the <trips from Q10> one-way trips you use the 91 Express Lanes toll road between Monday and Friday, how many do you take during rush hour periods, between 5AM and 9AM, or 3PM and 7PM?*

FIGURE 26 NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES, MON TO FRI RUSH HOUR



Overall, customers reported an average 1.81 trips per week on the 91 Express Lanes during rush hour periods in 2011. When compared to their respective counterparts, customers between the ages of 35 and 44, full-time employees, those from households that earn less than \$150,000 annually, college graduates, Latinos, and residents of San Bernardino County reported the greatest average number of one-way trips on the 91 Express Lanes during rush hour periods in a typical week (see Figures 27-29).

FIGURE 27 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES, MON TO FRI RUSH HOUR BY AGE, GENDER & EMPLOYED FULL TIME

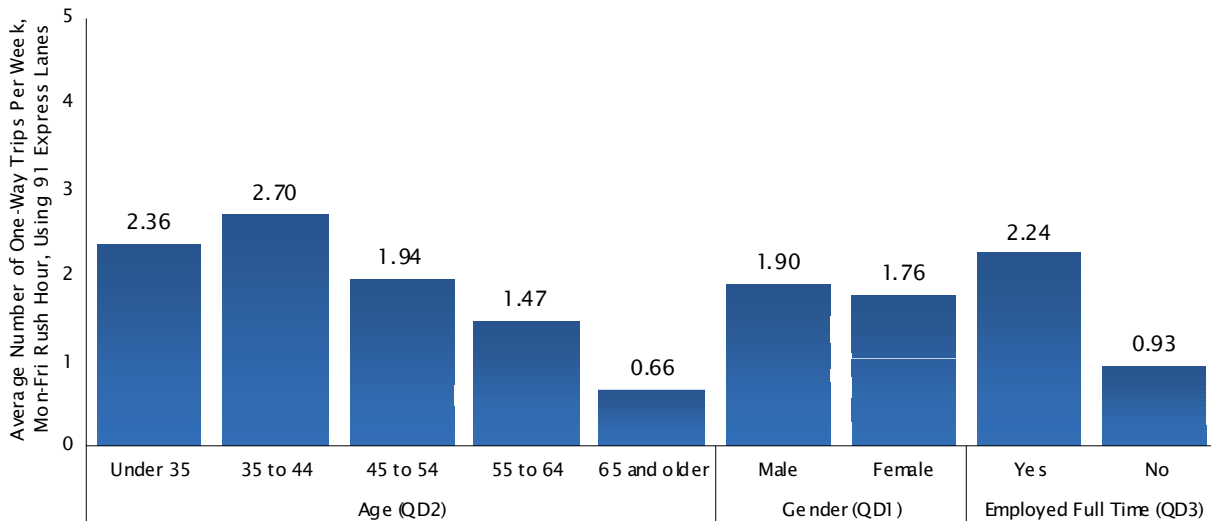


FIGURE 28 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES, MON TO FRI RUSH HOUR BY HOUSEHOLD INCOME & EDUCATION LEVEL

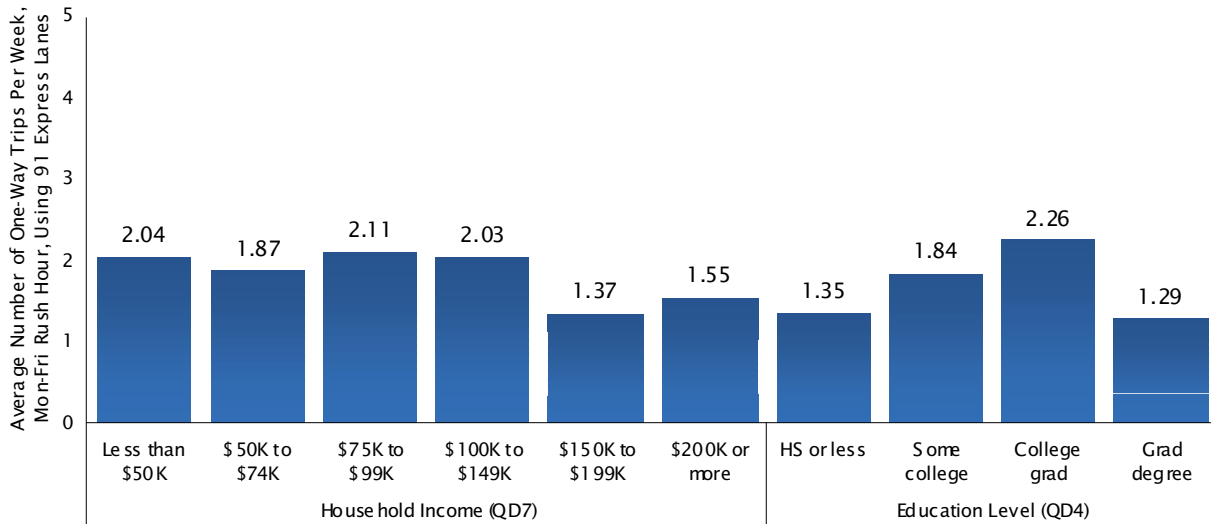
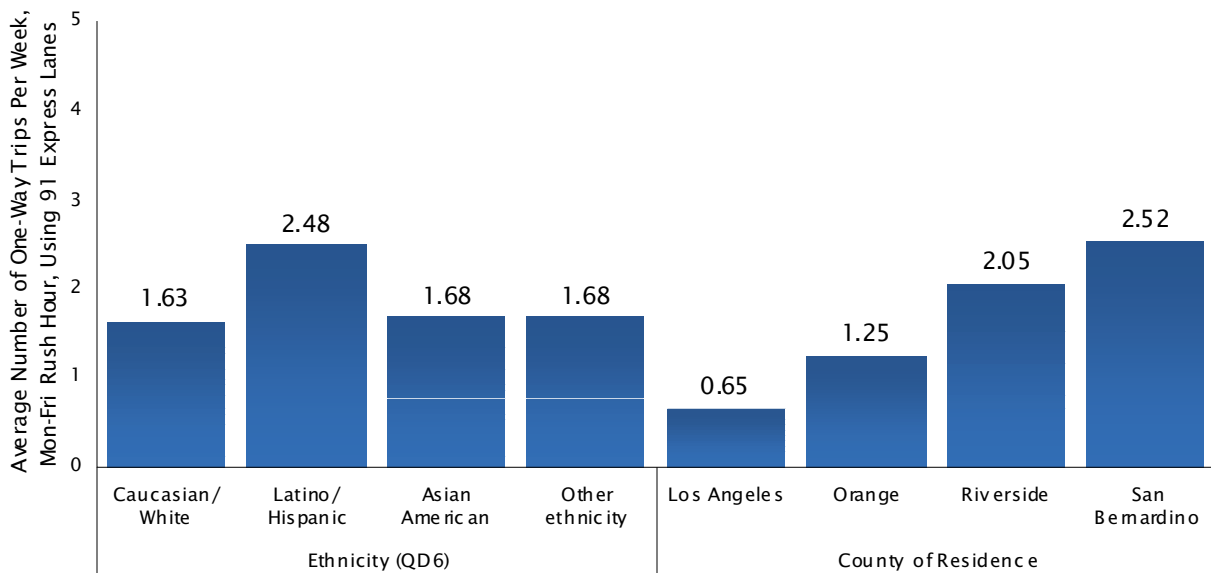


FIGURE 29 AVERAGE NUMBER OF ONE-WAY TRIPS PER WEEK TAKEN ON 91 EXPRESS LANES, MON TO FRI RUSH HOUR BY ETHNICITY & COUNTY OF RESIDENCE

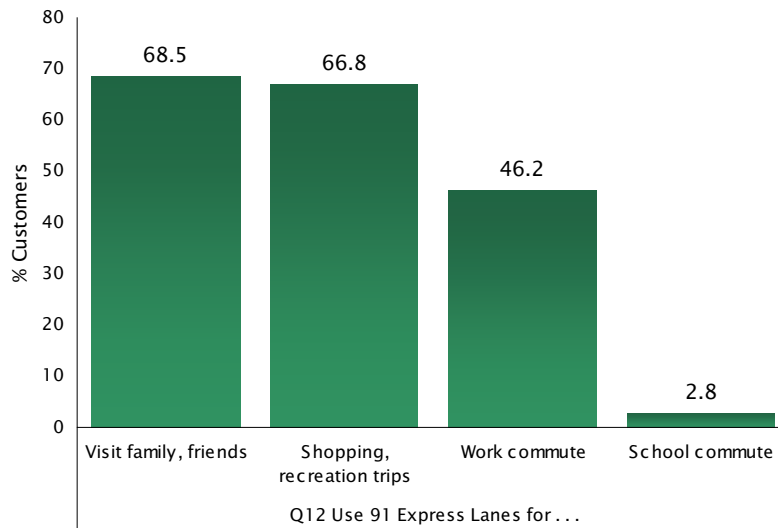


TRIP PURPOSE ON 91 EXPRESS LANES Whereas the prior questions in this series focused on profiling the *frequency* of trips that a respondent makes using the 91 Express Lanes, at this point the survey transitioned to measuring the *type* of trips they make using the Lanes. In other words, for what trip purposes do they use the 91 Express Lanes?

As shown in Figure 30 on the next page, most customers use the 91 Express Lanes for more than just their daily commute. In fact, the most commonly reported trips were visiting friends and family (mentioned by 69% of all customers) and shopping or recreation trips (67%). Just under half (46%) of all customers indicated that they use the 91 Express Lanes for their work commute, whereas just 3% indicated that they use the Lanes for commuting to or from school.

Question 12 Do you use the 91 Express Lanes toll road for: -----?

FIGURE 30 EXPRESS LANES USAGE



For the interested reader, Figures 31 and 32 show how the percentage of customers who use the 91 Express Lanes for trip purposes varied by age, gender, county of residence, and the length of time that they have been a 91 Express Lanes customer. The largest variation in trip purpose occurs for work trips, which were reported by a substantially higher percentage of males, those under 65 years of age, and residents of Riverside and San Bernardino counties when compared to their respective counterparts.

FIGURE 31 EXPRESS LANES USAGE BY AGE & GENDER

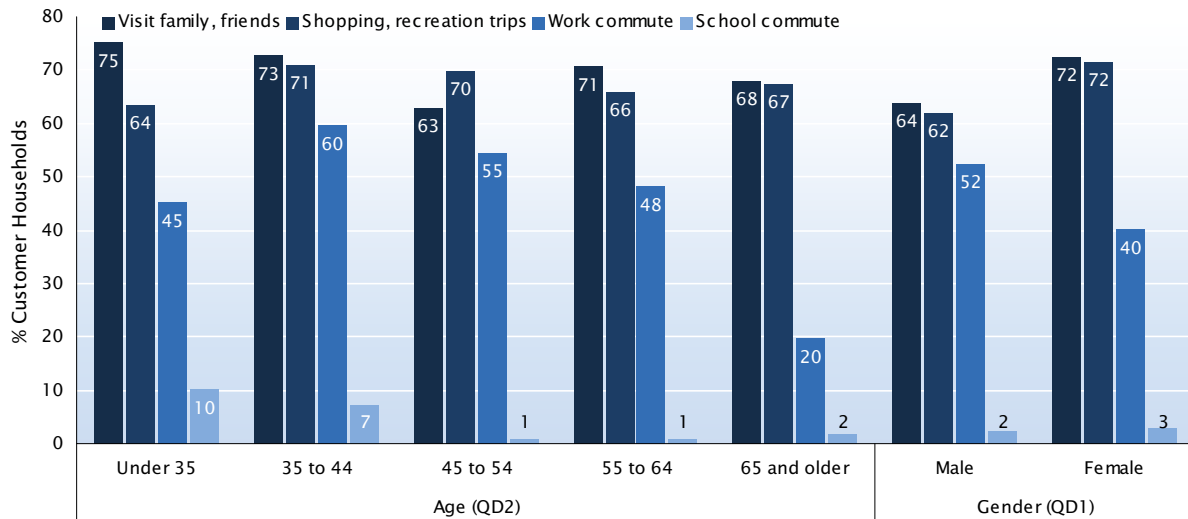
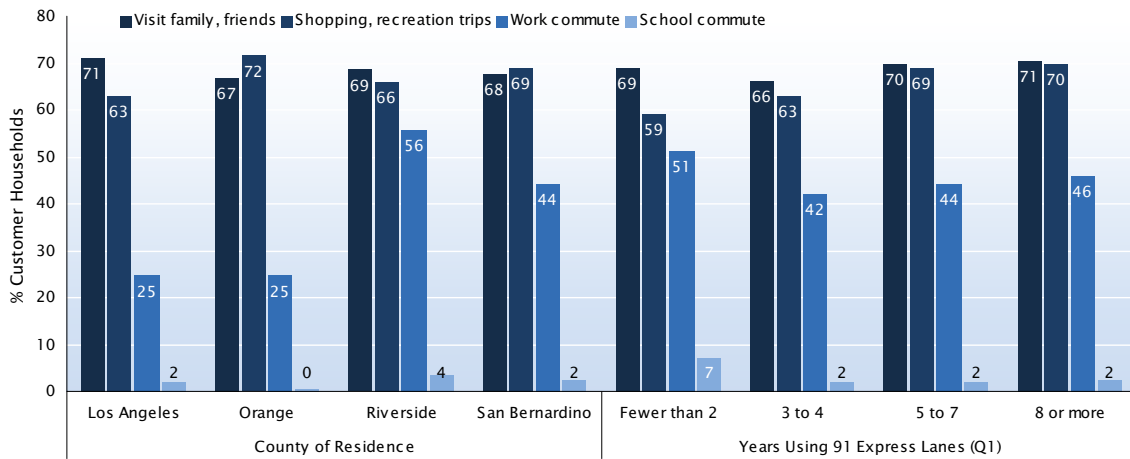


FIGURE 32 EXPRESS LANES USAGE BY COUNTY OF RESIDENCE & YEARS USING 91 EXPRESS LANES



ORIGIN AND DESTINATION FOR TYPICAL TRIP ON 91 EXPRESS LANES The final questions in this series asked respondents to identify the city in which they typically begin their trips that involve the 91 Express Lanes, as well as their typical destination. For respondents who reported that they use the Lanes for their work commute, the survey asked specifically about their work commute (Questions 13 & 14). Similarly, for respondents who indicated that they use the Lanes for commuting to/from school, the survey asked that they report the origin and destination of their school commute (Questions 15 & 16). Customers who indicated that they do not use the 91 Express Lanes for a work or school commute were asked to report the city that they typically originate their trips when using the Lanes, as well as the city that is their typical destination (Questions 17 & 18). The answers to all three groups are combined in Figure 33 on the next page, with the origins and destinations shown at the county level.⁷

Among work trips, three-quarters (75%) *originate* in Riverside County, 8% in Orange County, 7% in San Bernardino County, and 5% in Los Angeles County. More than half (58%) of work trips that involve the 91 Express Lanes are destined for Orange County, 22% for Los Angeles County, 7% for Riverside County, 2% for San Bernardino County, and 4% for an ‘other’ county.

The pattern is more diverse for non-work trips. Although Riverside County is still the dominant county of origin (49%), the percentage of non-work trips that originate in Orange County (26%) and Los Angeles County (13%) is higher, whereas San Bernardino County represents about the same percentage of work and non-work trip originations (7%). With respect to non-work trip destinations, Orange County is the most popular destination (39%), followed by Riverside County (26%), Los Angeles County (14%), ‘other’ counties (6%), and San Bernardino County (4%).

7. Because the sample size of respondents who use the 91 Express Lanes for commuting to school was small, they are grouped in the non-work trips category rather than as a separate category in Figure 33.

Question 13 *In what city do you typically begin your commute to work?*

Question 14 *What is the destination city for your work commute?*

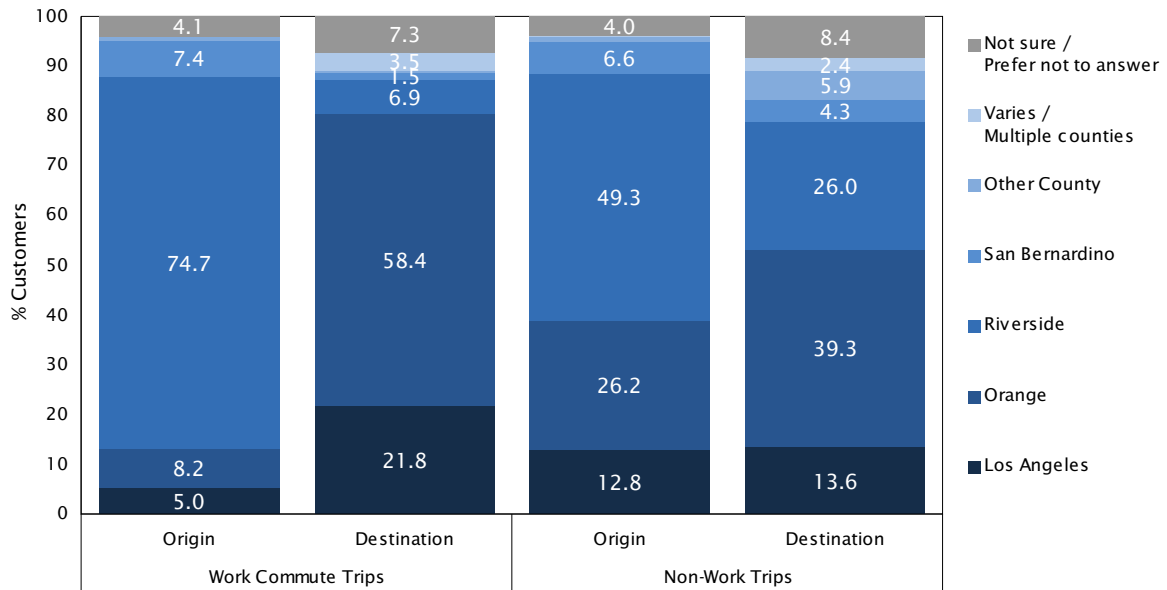
Question 15 *In what city do you typically begin your commute to school?*

Question 16 *What is the destination city for your school commute?*

Question 17 *In what city do you typically begin your trips that involve using the 91 Express Lanes toll road?*

Question 18 *What is the destination city that you are most often traveling to when you use the 91 Express Lanes?*

FIGURE 33 ORIGIN COUNTY & DESTINATION COUNTY OF WORK COMMUTE & NON-WORK TRIPS



OPINION OF 91 EXPRESS LANES

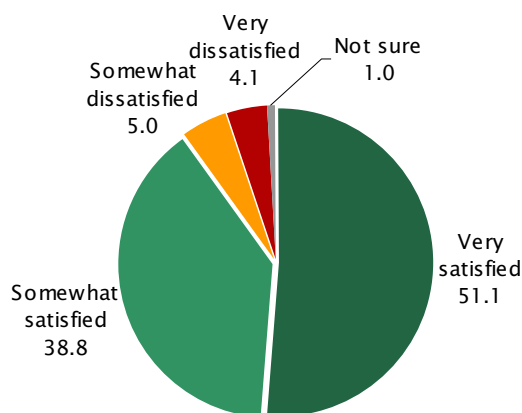
Having profiled customers' use of the 91 Express Lanes in the prior section, the survey next turned to assessing their opinions about the Lanes' performance in meeting their expectations.

OVERALL SATISFACTION The first question in this series asked respondents to indicate if, overall, they were satisfied or dissatisfied with their experiences when using the 91 Express Lanes. Because this question does not reference a specific aspect, facility, or service and requested that the respondent consider their experiences overall, the findings of this question may be regarded as an *overall performance rating* for the 91 Express Lanes.

As shown in Figure 34, an overwhelming majority (90%) of customers indicated that they were generally satisfied with their experiences when using the 91 Express Lanes, with more than half (51%) stating that they were *very* satisfied. A small portion of customers (9%) reported that they were dissatisfied, whereas 1% were unsure or unwilling to state their opinion. When compared to recent surveys, it appears that overall satisfaction with the 91 Express Lanes has increased slightly during the past two years.⁸

Question 19 *Overall, are you satisfied or dissatisfied with your experiences when using the 91 Express Lanes?*

FIGURE 34 OVERALL SATISFACTION WITH 91 EXPRESS LANES



The next three figures display how customers' opinions about the 91 Express Lanes' overall performance varied by subgroup, including length of use, days per month they use the Lanes, and demographic characteristics. Although there are some noteworthy differences across subgroups—e.g., the more days per month they use the Lanes, the less likely customers were to report being *very* satisfied—the most striking pattern is the general consistency of the results when combining the very and somewhat satisfied categories. More than three-quarters of customers in *every* identified subgroup reported being satisfied with their 91 Express Lanes experiences overall.

8. Eighty-seven percent (87%) of respondents in 2009 reported being satisfied with their experiences using the 91 Express Lanes, compared to 90% in 2011. However, it should be noted that the structure of the question was changed from a seven-point numerical scale in 2009 to a four-point verbal scale in 2011, which could have a slight impact on the comparability of the results.

FIGURE 35 OVERALL SATISFACTION WITH 91 EXPRESS LANES BY YEARS USING 91 EXPRESS LANES

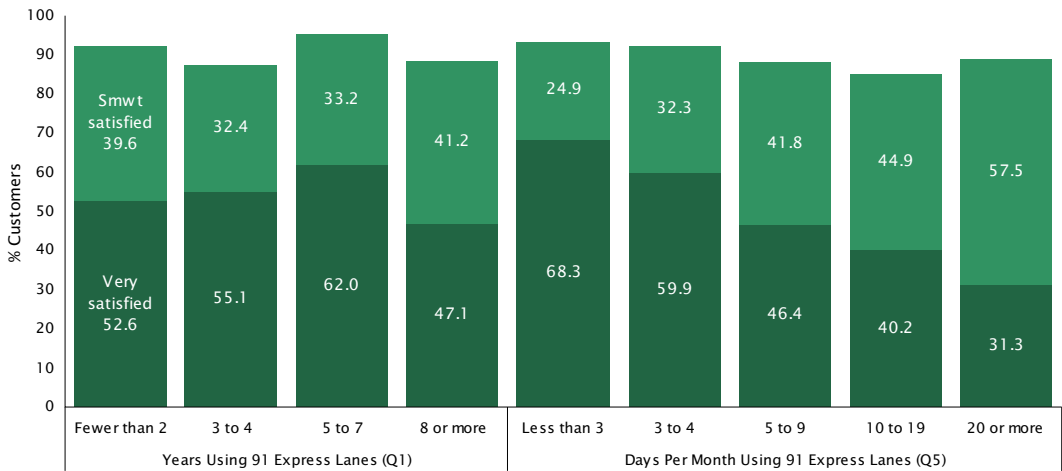


FIGURE 36 OVERALL SATISFACTION WITH 91 EXPRESS LANES BY TRIPS ON 91 EXPRESS LANES, MON TO FRI, TRIPS ON EXPRESS LANES, MON TO FRI RUSH HOUR & GENDER

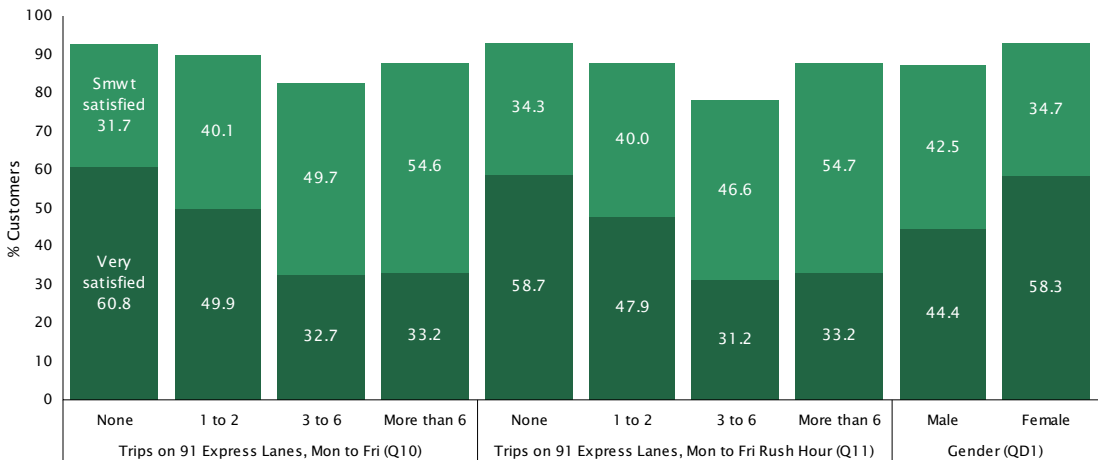
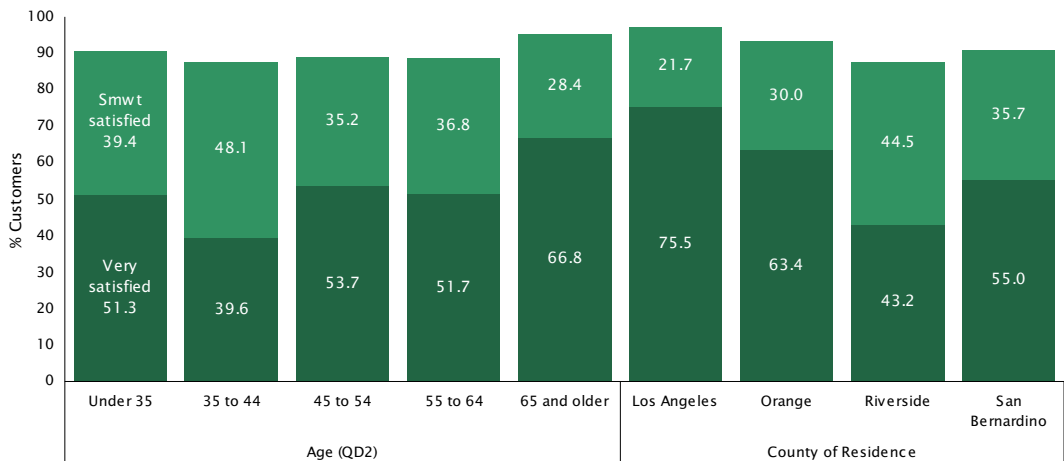


FIGURE 37 OVERALL SATISFACTION WITH 91 EXPRESS LANES BY AGE & COUNTY OF RESIDENCE

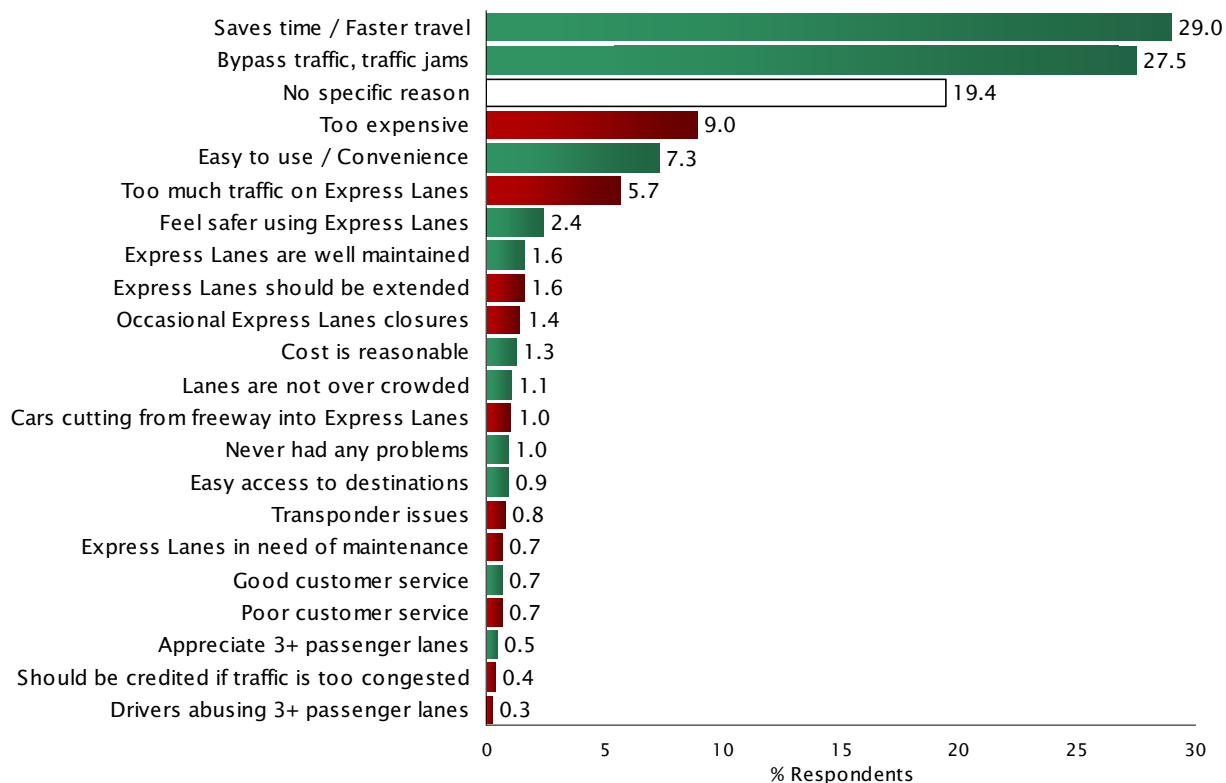


REASONS FOR OVERALL SATISFACTION/DISSATISFACTION Respondents were next asked to indicate if there was a particular reason why they are generally satisfied or dissatisfied with their experiences when using the 91 Express Lanes. Question 20 was presented in an open-ended manner, which allowed respondents to mention any reason that came to mind without being prompted by—or restricted to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 38. For the reader's convenience, reasons that were offered by those who were generally satisfied are represented by green bars, whereas reasons offered by dissatisfied customers are represented by red bars.

Satisfied customers were most apt to cite time savings or faster travel (29%) as the primary reason they were satisfied with the 91 Express Lanes, followed by the ability to bypass traffic (28%) and the ease of use/convenience offered by the Lanes (7%). Those who were generally dissatisfied with their experiences when using the 91 Express Lanes, on the other hand, were most likely to mention the expense of using the Lanes (9%) and the amount of traffic that exists on the toll road (6%) as the reasons for their position.

Question 20 *Is there a particular reason why you are (satisfied/dissatisfied)?⁹*

FIGURE 38 REASONS FOR SATISFACTION & DISSATISFACTION



9. Note that occasionally a satisfied customer mentioned a negative aspect in response to Question 20, whereas a dissatisfied customer mentioned a positive aspect of the 91 Express Lanes.

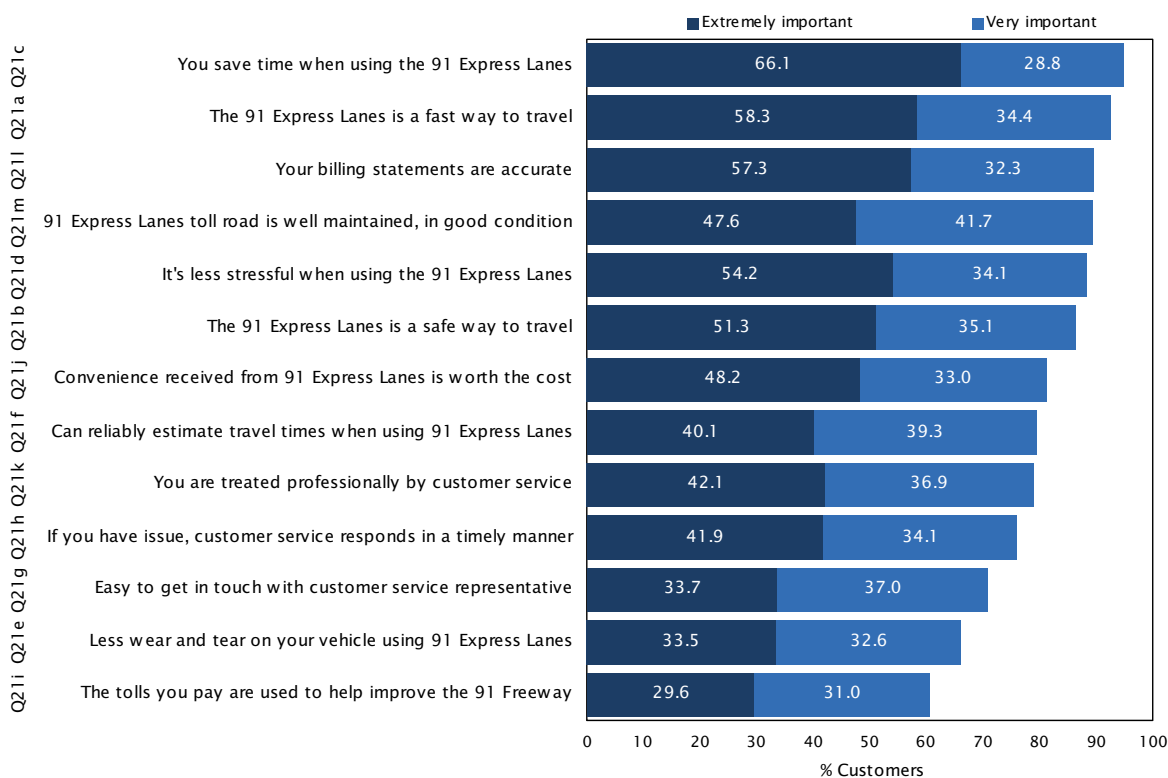
SPECIFIC SERVICE STANDARDS Whereas Question 20 addressed the 91 Express Lanes overall performance, the next series of questions asked respondents to rate the importance of specific service standards, as well as how well the Lanes are meeting these standards.

For each standard of service, respondents were first asked to indicate how important the service standard is to them as a 91 Express Lanes customer using a scale of extremely important, very important, somewhat important or not at all important. Respondents were then asked the extent to which they agreed (or disagreed) that the 91 Express Lanes are meeting the standard. The order of the items was randomized for each respondent to avoid a systematic position bias.

Figure 39 presents the service standards in rank order of importance according to the proportion of respondents who rated the standard as *at least* very important. Overall, 91 Express Lanes' customers rated saving time when they use the Lanes as the most important service standard (95%), followed by that the Lanes is a fast way to travel (93%), that their billing statements are accurate (90%), and that the Lanes are well-maintained and in good condition (89%). At the other end of the spectrum, customers rated as comparatively less important the use of tolls to help improve the 91 Freeway (61%), the reduction of wear and tear on their vehicle (66%), and the ease with which they can get in contact with a customer service representative (71%).

Question 21 Please tell me how important the following standards of service are to you as a 91 Express Lanes customer. Would you say it is extremely important, very important, somewhat important, or not at all important to you that: _____?

FIGURE 39 IMPORTANCE OF 91 EXPRESS LANES ASPECTS

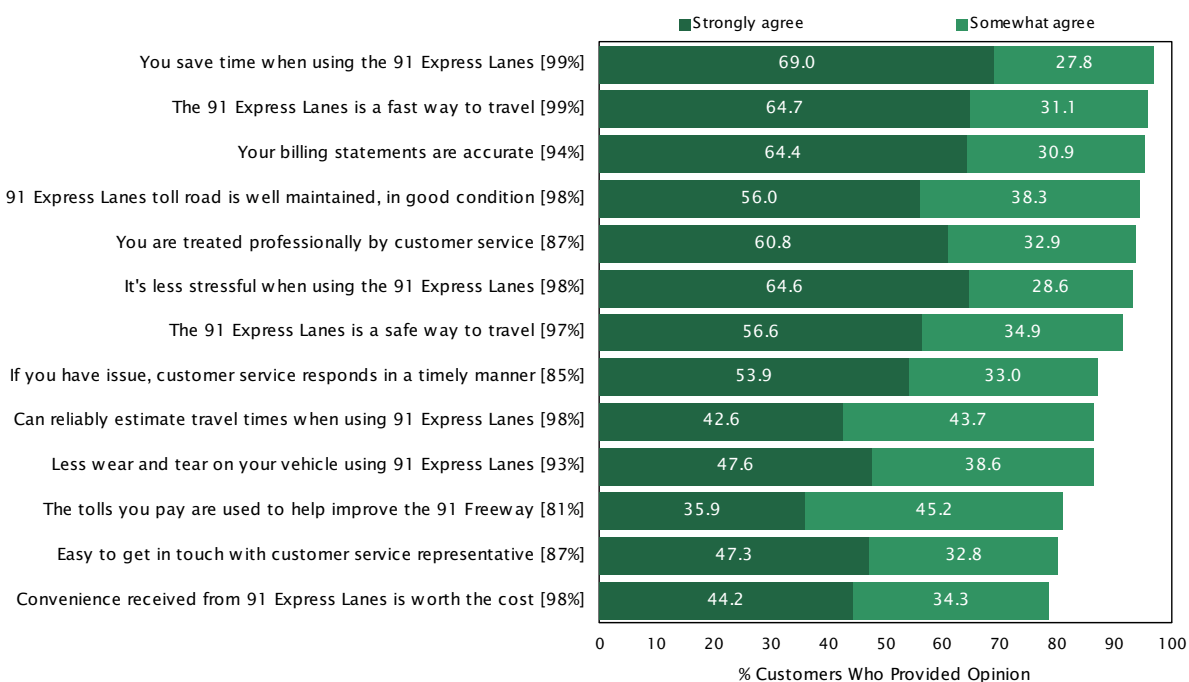


Turning to the satisfaction component, Figure 40 sorts the same list of service standards according to the proportion of respondents who agreed (strongly or somewhat) that the 91 Express Lanes is meeting the service standard. To allow for an apples-to-apples comparison of the ratings, only respondents who held an opinion (either agree or disagree) were included in the figure. Those who did not have an opinion were removed from this analysis. The percentage who held an opinion for each service standard is shown to the right of the service label in parentheses.

Overall, 91 Express Lanes customers expressed the highest levels of agreement that the Lanes allow them to save time (97%), followed by that they are a fast way to travel (96%), their billing statements are accurate (95%), and that the Lanes are well-maintained and in good condition (94%). Although still very high levels of agreement, fewer customers agreed that the convenience received from using the 91 Express Lanes is worth the cost (79%), that it is easy to get in touch with a customer service representative when needed (80%), and that the tolls they pay are used to help improve the 91 Freeway (81%).

Question 22 *Do you agree or disagree that _____? Would that be strongly (agree/disagree) or somewhat (agree/disagree)?*

FIGURE 40 AGREEMENT WITH 91 EXPRESS LANES ASPECTS





PERFORMANCE NEEDS & PRIORITIES

With a measure of the importance of a service standard to customers as well as a measure of customers' satisfaction with the 91 Express Lanes' performance in meeting the standards, True North is able to examine the relationship between these two dimensions and identify service areas where OCTA has the greatest opportunities to improve overall customer satisfaction—as well as identify for which service standards the Lanes are meeting, and even exceeding, the vast majority of customers' needs.

Rather than rely on sample *averages* to conduct this analysis, True North has developed and refined an *individualized* approach to identifying priorities that is built on the recognition that opinions will vary from customer to customer, and that understanding this variation is required for assessing how well the 91 Express Lanes is meeting the needs of its customers.¹⁰ Table 2 presents a two-dimensional space, or grid, based on the importance and agreement scales. The horizontal axis corresponds to the four *importance* response options, whereas the vertical scale corresponds to the four *agreement* (satisfaction) response options. The 16 cells within the grid are grouped into one of six categories based on how well the Lanes is meeting, or not meeting, a customer's needs for a particular service standard. The six groups are as follows:

<i>Exceeding Needs</i>	The Lanes is exceeding a respondent's needs if a respondent is satisfied and the level of expressed agreement (satisfaction) is higher than the importance the respondent assigned to the standard.
<i>Meeting Needs, Moderately</i>	The Lanes is moderately meeting a respondent's needs if the respondent is satisfied and the level of agreement (satisfaction) is commensurate with the level of importance assigned to the standard.
<i>Meeting Needs, Marginally</i>	The Lanes is marginally meeting a respondent's needs if the respondent agrees that the Lanes is meeting a service standard, but their level of agreement is lower than the level of importance assigned to the standard.
<i>Not Meeting Needs, Marginally</i>	The Lanes is marginally <i>not</i> meeting a respondent's needs if the respondent disagrees somewhat that the standard is being met, but the service standard is also viewed as just somewhat or not at all important.
<i>Not Meeting Needs, Moderately</i>	The Lanes is moderately <i>not</i> meeting a respondent's needs if a) a respondent strongly disagrees that a standard is being met, but the service is viewed as just somewhat or not at all important, or b) a respondent somewhat disagrees that a standard is being met and the standard is viewed as very important.

10. Any tool that relies solely on the opinions of the average respondent will provide a limited and occasionally somewhat distorted picture of how well an agency or facility is performing. OCTA's customers are not comprised entirely of *average* customers—the group is comprised of unique individuals who will vary substantially in their opinions of the 91 Express Lanes performance in different service areas. Thus, although the arithmetic average of these individuals' opinions is a useful statistic, it does not capture the variation in opinions that occurs among customers—it is this variation that is critical for assessing how well the Lanes is meeting the needs of its customers. Thus, True North conducts the priority analysis at the individual respondent level, rather than at an aggregated level using the *average* of customer's opinions.

Not Meeting Needs, Severely

The Lanes is severely *not* meeting a respondent’s needs if a) a respondent disagrees that a standard is being met and the service standard is viewed as extremely important, or b) a respondent is strongly disagrees that a standard is being met and the standard is viewed as very important.

TABLE 2 NEEDS & PRIORITY MATRIX

		Importance			
		Not at all important	Somewhat important	Very important	Extremely important
Agreement	Strongly agree	Exceeding needs	Exceeding needs	Meeting needs, moderately	Meeting needs, moderately
	Somewhat agree	Exceeding needs	Meeting needs, moderately	Meeting needs, marginally	Meeting needs, marginally
	Somewhat disagree	Not meeting needs, marginally	Not meeting needs, marginally	Not meeting needs, moderately	Not meeting needs, severely
	Strongly disagree	Not meeting needs, moderately	Not meeting needs, moderately	Not meeting needs, severely	Not meeting needs, severely

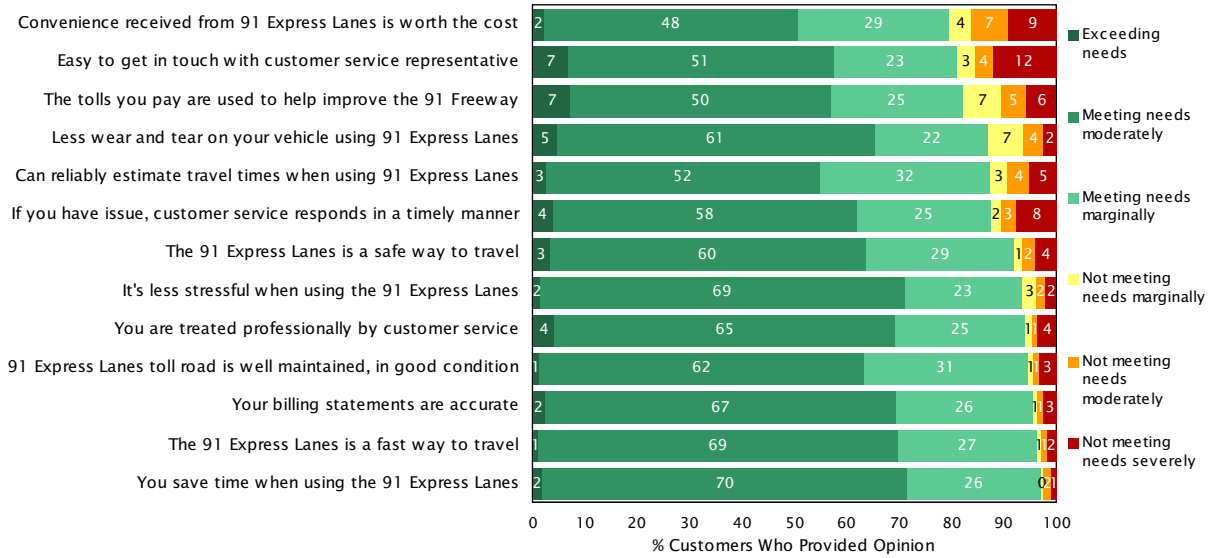
Using this framework, True North categorized respondents individually for each of the 13 service standards tested. For example, a respondent who indicated that saving time when using the 91 Express Lanes was somewhat important and they strongly agreed that they do save time when using the Lanes would be categorized in the *exceeding needs* group for this service standard. The same respondent may be grouped in the *marginally not meeting needs* group for another service standard if they somewhat disagreed that the Lanes were meeting the service standard, but the standard was viewed as only somewhat important.

Figure 41 on the next page presents each of the 13 service standards, along with the percentage of respondents grouped into each of the six possible categories. For ease of interpretation, the color-coding in Figure 41 is consistent with that presented in Table 2. For example, for the service standard *Easy to get in touch with a customer service representative*, the Lanes is exceeding the needs of 7% of customers, moderately meeting the needs of 51% of customers, marginally meeting the needs of 23% of customers, marginally not meeting the needs of 3% of customers, moderately not meeting the needs of 4% of customers, and severely not meeting the needs of 12% of customers.

The most striking pattern in the figure is that the 91 Express Lanes is meeting the expectations of at least 79% of customers for *every* service standard tested, and at least 90% of customers for the majority of standards tested.

Operating from the management philosophy that—all other things being equal—OCTA should focus on improving service standards that have the highest percentage of customers for which the Lanes is currently *not* meeting their needs, the standards have been sorted by order of priority. Thus, improving the relationship between the perceived convenience and cost of the Lanes is the top priority, followed by making it easier to get in touch with a customer service representative, and increasing the perceived use of tolls to improve the 91 Freeway.

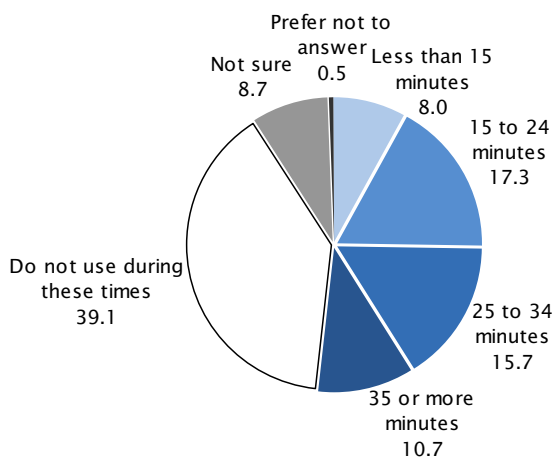
FIGURE 41 CUSTOMER SERVICE NEEDS



PERCEIVED TIME-SAVINGS WHEN USING 91 EXPRESS LANES Given the importance that customers assign to time-savings when using the 91 Express Lanes, the survey sought to gauge the *amount* of time that customers perceive they are saving when they use the Lanes. Question 23 inquired about the time they save for a typical one-way trip during morning rush hour, whereas Question 24 referenced the afternoon rush hour period.

Question 23 *About how much time do you think you save for a typical one-way trip during the morning rush hour when you travel on the 91 Express Lanes?*

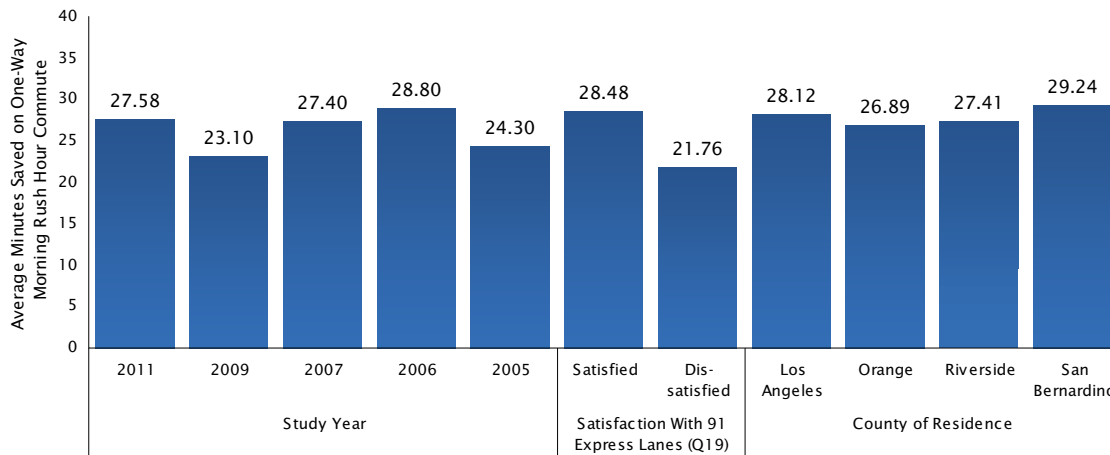
FIGURE 42 TIME SAVED ON TYPICAL ONE-WAY TRIP DURING MORNING RUSH HOUR



Among all customers surveyed, 39% indicated that they do not use the 91 Express Lanes during the morning rush hour period, and an additional 9% indicated they were not sure about their time-savings. Among the remaining customers, 8% indicated they save less than 15 minutes, 17% reported a perceived time savings of 15 to 24 minutes, 16% felt they save between 25 and 34 minutes, whereas 11% perceived that they save 35 minutes or more per one-way trip.

Among all customers who reported a perceived time savings, the average perceived time savings when using the 91 Express Lanes during morning rush hour was 27.58 minutes. Figure 43 on the next page shows how the perceived time savings varied by year, whether customers were generally satisfied or dissatisfied with their experiences using the 91 Express Lanes, and county of residence. It is noteworthy that customers who were generally dissatisfied with the 91 Express Lanes perceived a substantially smaller time savings when compared to customers who were generally satisfied.

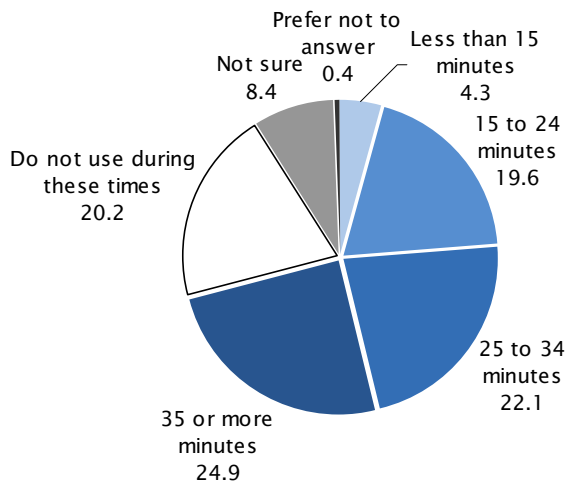
FIGURE 43 AVERAGE TIME SAVED ON TYPICAL ONE-WAY TRIP DURING MORNING RUSH HOUR BY STUDY YEAR, SATISFACTION WITH 91 EXPRESS LANES & COUNTY OF RESIDENCE



With respect to the afternoon rush hour period, customers perceived that their time savings when using the 91 Express Lanes was even greater. Among all customers surveyed, 20% indicated that they do not use the 91 Express Lanes during the morning rush hour period, and an additional 8% indicated they were not sure about their time-savings. Among the remaining customers, 4% indicated they save less than 15 minutes, 20% reported a perceived time savings of 15 to 24 minutes, 22% felt they save between 25 and 34 minutes, whereas one quarter (25%) perceived that they save 35 minutes or more per one-way trip.

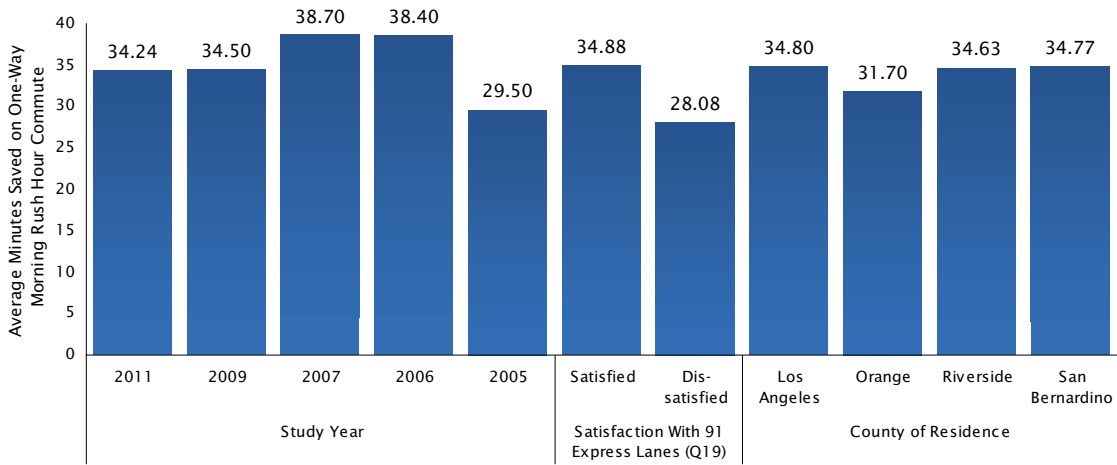
Question 24 *About how much time do you think you save for a typical one-way trip during the afternoon rush hour when you travel on the 91 Express Lanes?*

FIGURE 44 TIME SAVED ON TYPICAL ONE-WAY TRIP DURING AFTERNOON RUSH HOUR



Among all customers who reported a perceived time savings, the average perceived time savings when using the 91 Express Lanes during the afternoon rush hour was 34.24 minutes. Once again, customers who were generally dissatisfied with the 91 Express Lanes perceived a substantially smaller time savings when compared to customers who were generally satisfied (see Figure 45).

FIGURE 45 AVERAGE TIME SAVED ON TYPICAL ONE-WAY TRIP DURING AFTERNOON RUSH HOUR BY STUDY YEAR, SATISFACTION WITH 91 EXPRESS LANES & COUNTY OF RESIDENCE



IMPROVEMENTS TO 91 EXPRESS LANES

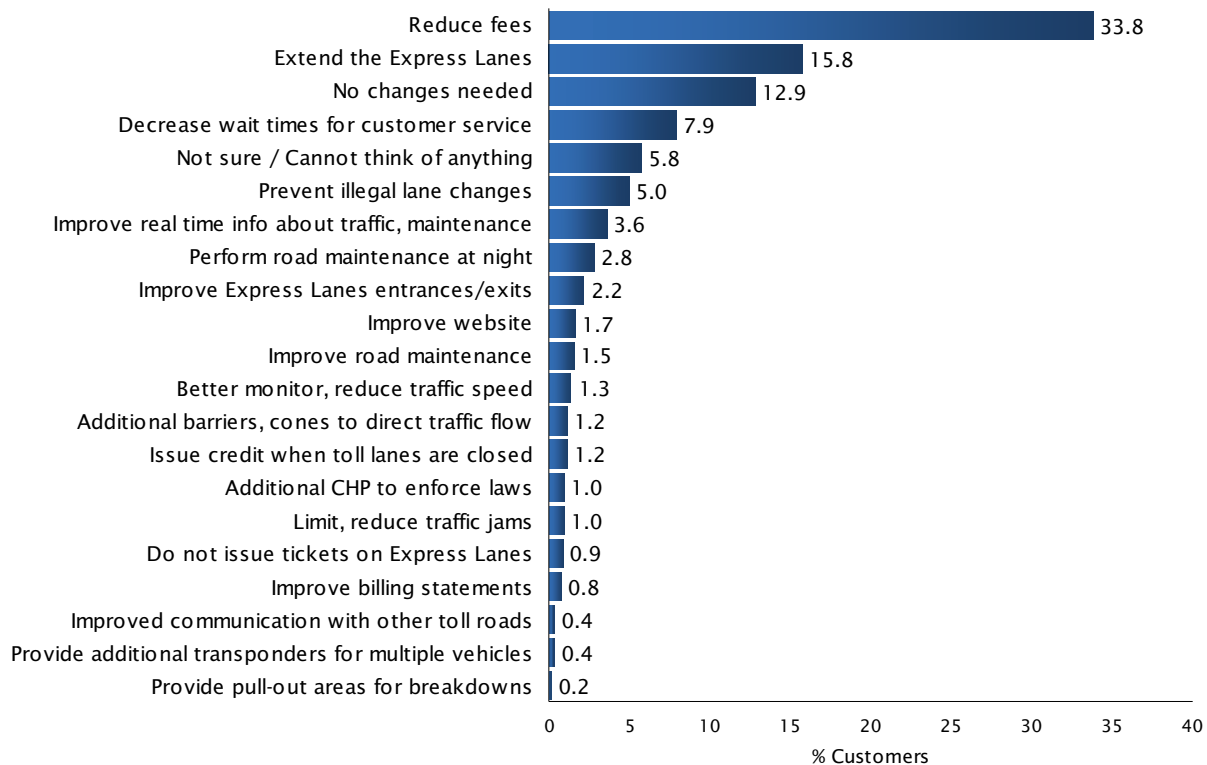
The prior two sections of this report focused on profiling customers' use of the 91 Express Lanes as well as how well their needs are currently being met by the Lanes across a variety of performance dimensions. Beginning with Question 25, however, the survey became more *future* oriented, addressing potential improvements and policy changes related to the 91 Express Lanes.

MOST DESIRED IMPROVEMENT TO 91 EXPRESS LANES The opening question in this series asked customers to identify the one aspect of the 91 Express Lanes road or customer service that they would most like to improve. Question 25 was posed in an open-ended manner, thereby allowing respondents the opportunity to mention any improvement that came to mind without being prompted by—or restricted to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 46 below.

The most common change that customers mentioned was a desire for reduced fees (34%), followed by extending the Express Lanes (16%), decreasing the wait times for customer service (8%), and improved prevention of illegal lane changes (5%). It is worth noting, moreover, that nearly one in five customers (19%) indicated that no changes were needed or that they could not think of a needed change.

Question 25 *If you could improve one aspect of the 91 Express Lanes road or customer service, what change would you most like to see?*

FIGURE 46 CHANGES TO IMPROVE 91 EXPRESS LANES



PROPOSED EXTENSION OF 91 EXPRESS LANES One of the improvements that OCTA anticipates making to Orange County’s transportation system is extending the 91 Express Lanes east to connect with Interstate 15. This survey presented an opportunity to ask existing customers whether they would use this new section of the Lanes once it is completed. Figure 47 demonstrates that the vast majority of existing customers (81%) anticipate that they would use the new section of the Lanes, whereas 11% expected that they would not use the new section, and 8% were unsure or unwilling to share their opinion. For the interested reader, Figures 48-49 show how expected use of the extended section of the 91 Express Lanes varied by monthly use of the Lanes, the number of trips customers currently make during rush hour periods, trip purposes, overall satisfaction with the Lanes, and county of residence.

Question 26 *There are plans to extend the 91 Express Lanes east to Interstate 15. Once completed, would you use this new section of the 91 Express Lanes?*

FIGURE 47 WOULD USE NEW SECTION OF 91 EXPRESS LANES

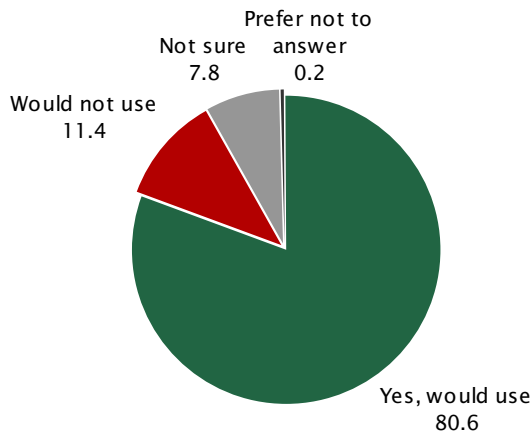


FIGURE 48 WOULD USE NEW SECTION OF 91 EXPRESS LANES BY DAYS PER MONTH USING 91 EXPRESS LANES & TRIPS ON 91 EXPRESS LANES, MON TO FRI RUSH HOUR

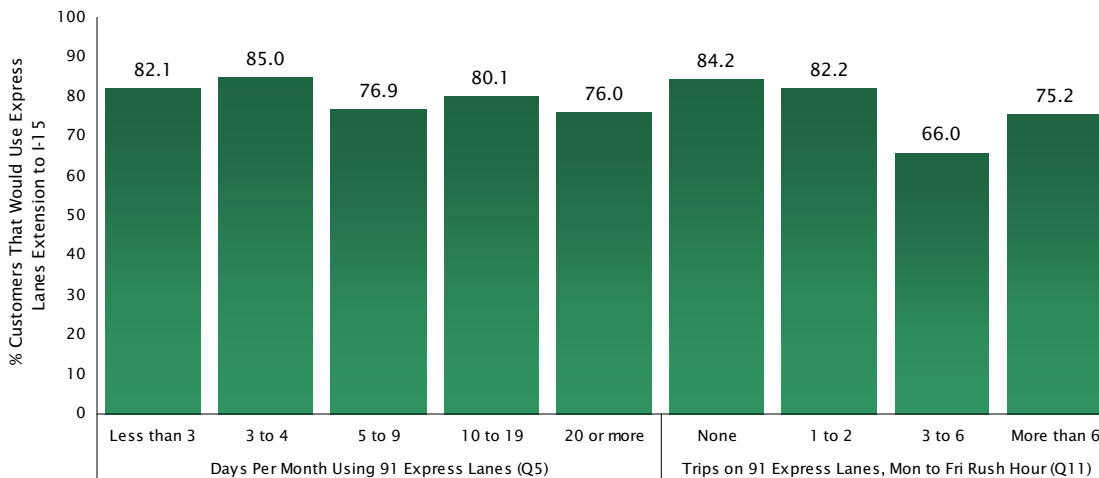
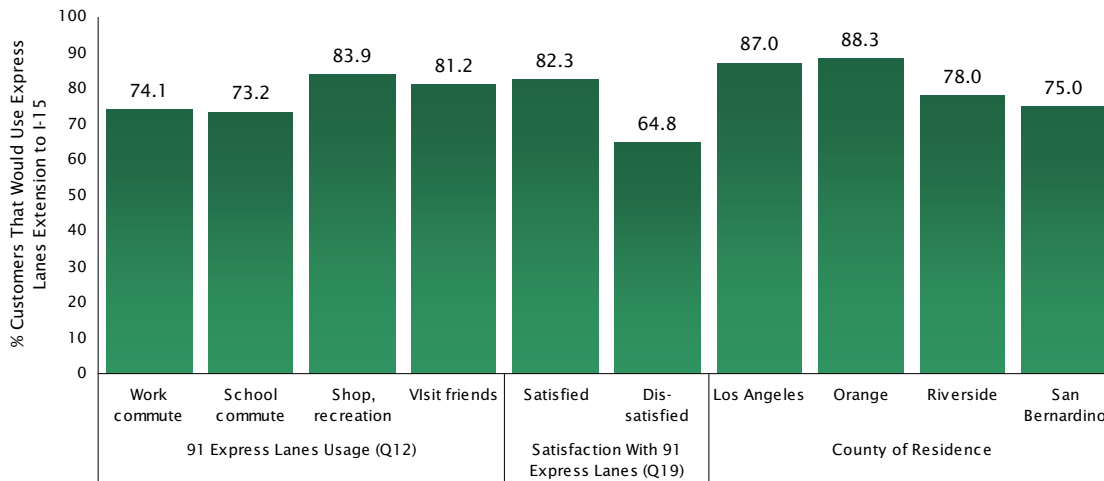


FIGURE 49 WOULD USE NEW SECTION OF 91 EXPRESS LANES BY 91 EXPRESS LANES USAGE, SATISFACTION WITH 91 EXPRESS LANES & COUNTY OF RESIDENCE



Customers who anticipated using the extended section of the 91 Express Lanes in the future were also asked if they expected to use the new section when traveling both directions, or just east or west. Figure 50 combines the answers to Questions 26 and 27 to profile the expected use of the new section of the Lanes among *all* customers. Overall, 72% of existing customers anticipated using the extended section of the 91 Express Lanes in both directions, 6% expected to use the section only when traveling east, 1% anticipated using the new section only when traveling west, whereas 19% did not expect to use the extension and 1% were unsure. Figures 51 and 52 on the next page show how anticipated use of the 91 Express Lanes extension varied across key customer subgroups.

Question 27 *Would you use it when traveling both directions, or just east or west?*

FIGURE 50 USE OF NEW SECTION OF 91 EXPRESS LANES

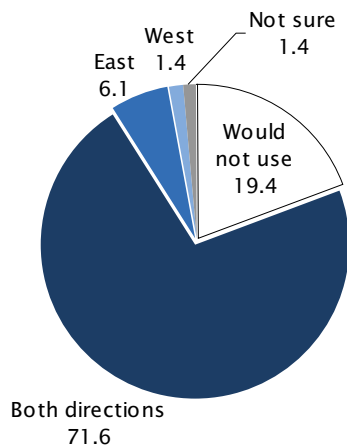


FIGURE 51 USE OF NEW SECTION OF 91 EXPRESS LANES BY DAYS PER MONTH USING 91 EXPRESS LANES & TRIPS ON 91 EXPRESS LANES, MON TO FRI RUSH HOUR

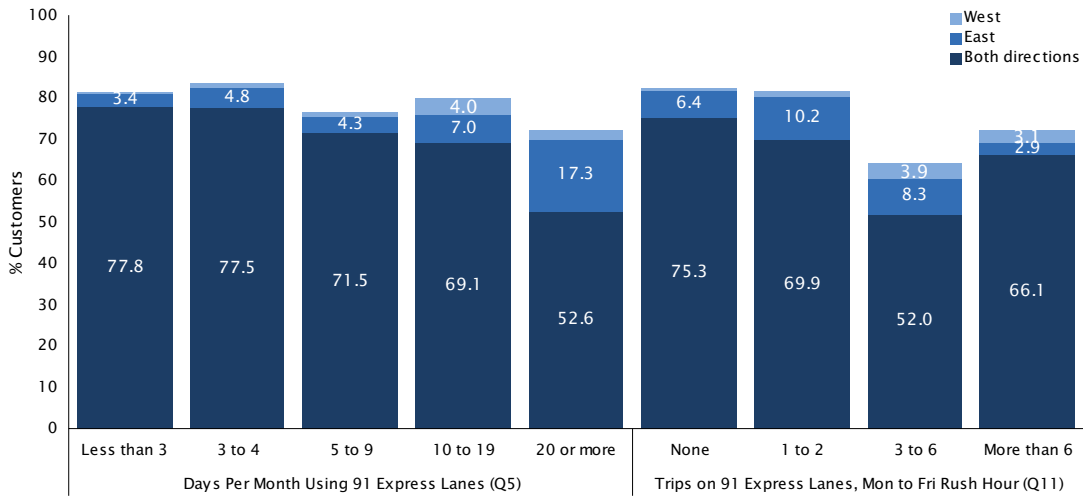
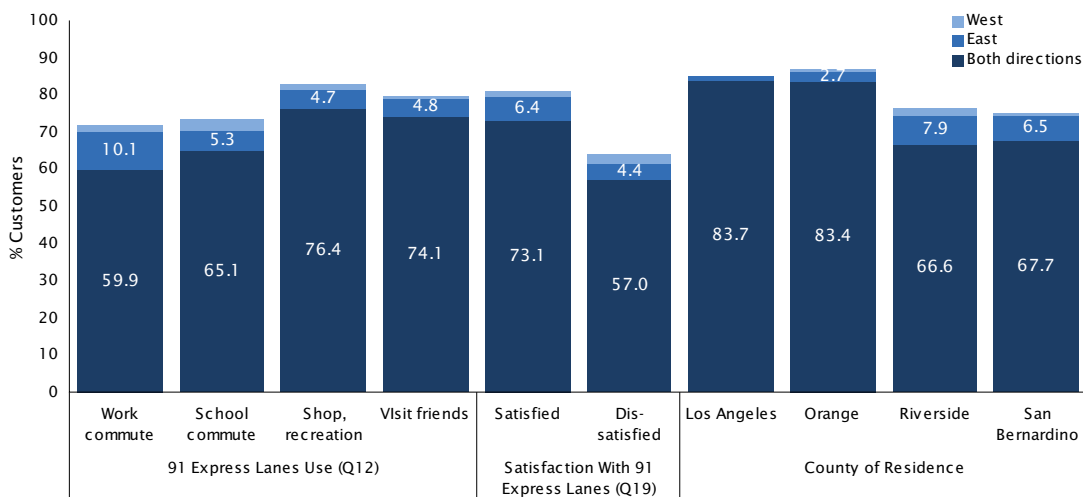


FIGURE 52 USE OF NEW SECTION OF 91 EXPRESS LANES BY 91 EXPRESS LANES USAGE, SATISFACTION WITH 91 EXPRESS LANES & COUNTY OF RESIDENCE

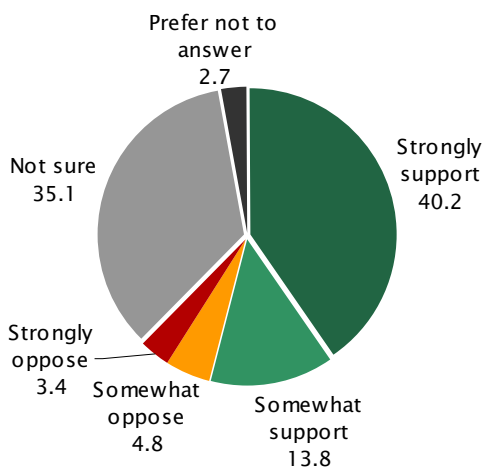


SUPPORT FOR 91 EXPRESS LANES - 241 DIRECT CONNECT In addition to extending the 91 Express Lanes, OCTA also plans to construct a direct connection between the 91 Express Lanes and the 241 toll road. After briefly describing the proposed project, Question 28 of the survey asked respondents whether they support or oppose plans to build this connection, or if they have no opinion either way.

Just over one-third (35%) of 91 Express Lanes customers indicated that they did not have an opinion about the proposed direct connection between the Lanes and the 241 toll road, and an additional 3% preferred not to answer the question (see Figure 53 on the next page). Among those with an opinion, however, the results were decidedly positive, with supporters outnumbering opponents more than six to one (6:1). Overall, 54% of customers indicated that they support the proposed direct connection between the 91 Express Lanes and the 241 toll road, compared to just 8% who opposed the project.

Question 28 There are also plans for a future direct connection between the 91 Express Lanes and the 241 toll road. Do you support or oppose plans to build this connection, or do you have no opinion either way?

FIGURE 53 SUPPORT FOR CONNECTION TO 241 TOLL ROAD



The strong levels of support for building the 91 Express Lanes-241 toll road direct connection found among customers overall were also found within *all* of the key customer subgroups. As shown in Figures 54 and 55, there was not a single customer subgroup for which supporters of the project outnumbered opponents by less than 2.9 to 1.

FIGURE 54 SUPPORT FOR CONNECTION TO 241 TOLL ROAD BY YEARS USING 91 EXPRESS LANES & DAYS PER MONTH USING 91 EXPRESS LANES

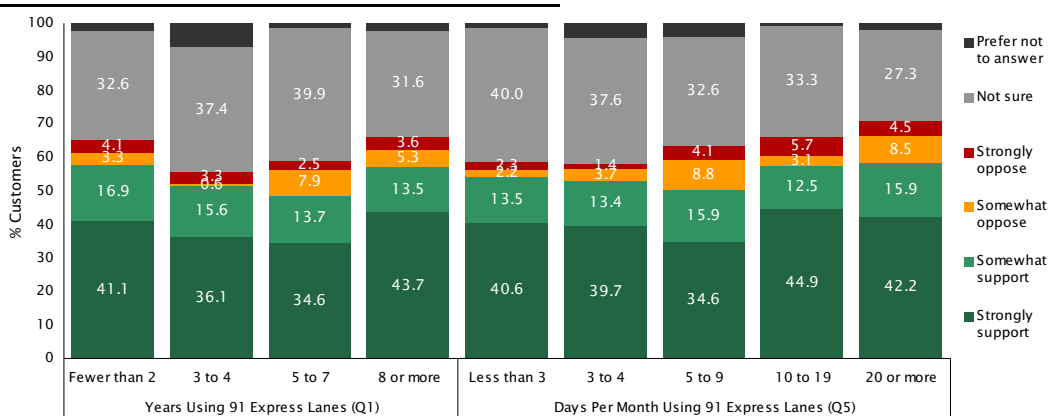
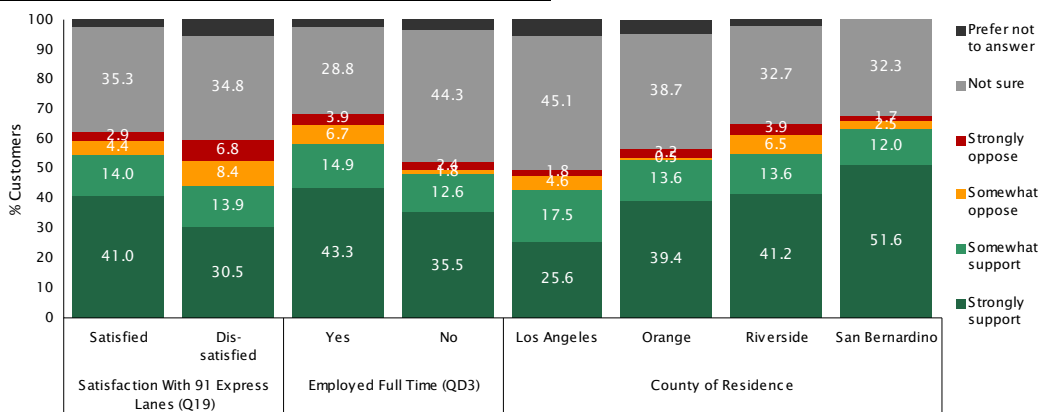


FIGURE 55 SUPPORT FOR CONNECTION TO 241 TOLL ROAD BY SATISFACTION WITH 91 EXPRESS LANES, EMPLOYED FULL TIME & COUNTY OF RESIDENCE

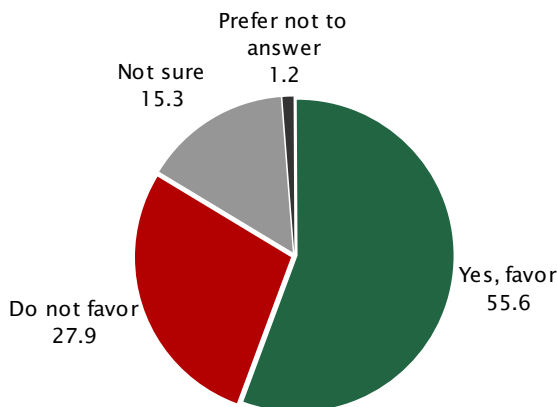


TOLL CHARGE STRATEGY One of the challenges in establishing a toll charge for the 91 Express Lanes is that the price will dictate, to some degree, the level of use. Set the fee too high and customers will use the Lanes less frequently, possibly lowering the overall revenues to OCTA and leaving unused capacity. On the other hand, if the fee is set too low, too many customers may choose to use the 91 Express Lanes and create congestion, in which case customers will not receive the key benefits they seek (saving time/avoiding traffic) when they decide to use the Lanes.

Although OCTA realizes the relationship between the amount of the toll charge, use of the Lanes, and the state of congestion, the survey presented an opportunity to gauge customers' opinions on this matter. Question 29 first informed customers that the toll charge on the 91 Express Lanes is set so that traffic is free flowing—and that if the fee is set too low, it will lead to traffic congestion. All customers were next asked if they favor this policy of maintaining free flow driving conditions in the Express Lanes, even if it means paying a higher toll at times?

Question 29 *The toll charge on the 91 Express Lanes is set so that traffic is free flowing. If the fee is set too low, it will lead to traffic congestion. Do you favor this policy of maintaining free flow driving conditions in the Express Lanes, even if it means paying a higher toll at times?*

FIGURE 56 OPINION OF VARIABLE TOLL



Overall, a majority (56%) of 91 Express Lanes customers indicated that they support the policy of setting the toll charge high enough to keep traffic free flowing, whereas 28% opposed this policy and 17% were unsure or unwilling to share their opinion (see Figure 56). Although most sub-groups clearly supported the policy of setting the toll charge high enough to keep traffic free flowing, it is worth noting that support tended to diminish as frequency of use increased. Moreover, customers who were generally *dissatisfied* with their experiences using 91 Express Lanes were the one subgroup that opposed the policy (see Figures 57 & 58).

FIGURE 57 OPINION OF VARIABLE TOLL BY YEARS USING 91 EXPRESS LANES & DAYS PER MONTH USING 91 EXPRESS LANES

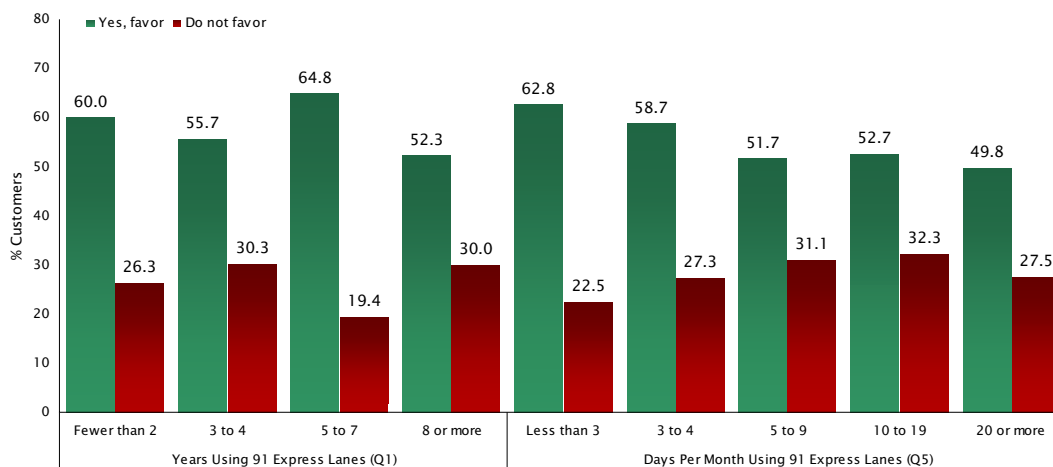
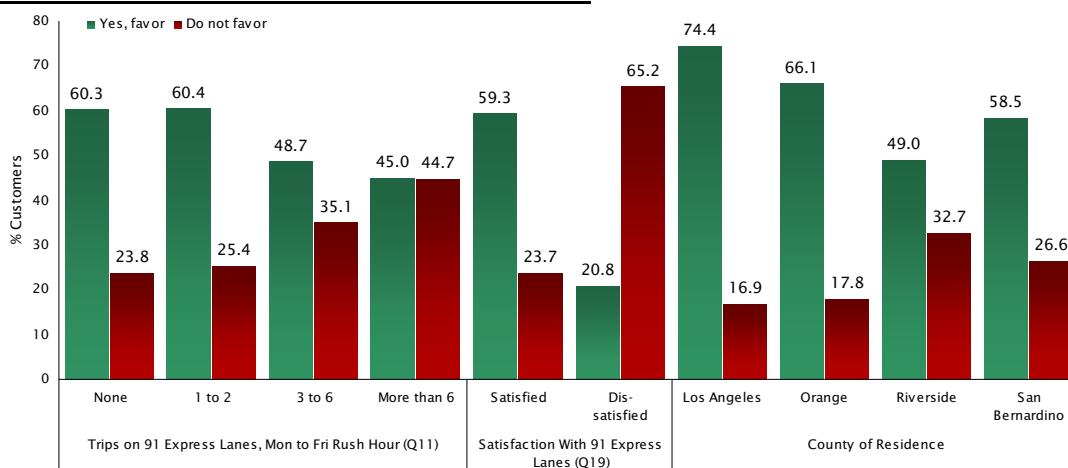


FIGURE 58 OPINION OF VARIABLE TOLL BY TRIPS ON 91 EXPRESS LANES, MON TO FRI RUSH HOUR, SATISFACTION WITH 91 EXPRESS LANES & COUNTY OF RESIDENCE



IMPACT OF TOLL CHARGE ON TRAVEL TIME The final question in this series asked customers whether they would alter their daily travel schedule to avoid rush hour periods if the toll for using the 91 Express Lanes was lower just before and after rush hour. As shown in Figure 59 on the next page, most customers (54%) stated that they would alter their travel schedule to realize the savings, whereas 37% indicated that they would not alter their travel behavior and 10% were unsure or unwilling to share their opinion.

A willingness to change one’s travel schedule bore a strong relationship to certain customer characteristics, including the number of trips they typically make during rush hour, their overall level of satisfaction with the 91 Express Lanes, and county of residence (see Figures 60 & 61). When compared to their respective counterparts, customers who currently make few rush hour trips on the 91 Express Lanes per month (less than 3), customers who were dissatisfied with their overall experiences when using the Lanes, and residents of Orange, Riverside and San Bernardino counties were the most likely to anticipate changing their travel schedule in response to this tolling strategy.

Question 30 *Would you be willing to alter your daily travel schedule to avoid rush hour if the toll for using the 91 Express Lanes was lower just before and after rush hour?*

FIGURE 59 WILLING TO AVOID RUSH HOUR TO PAY LOWER TOLL

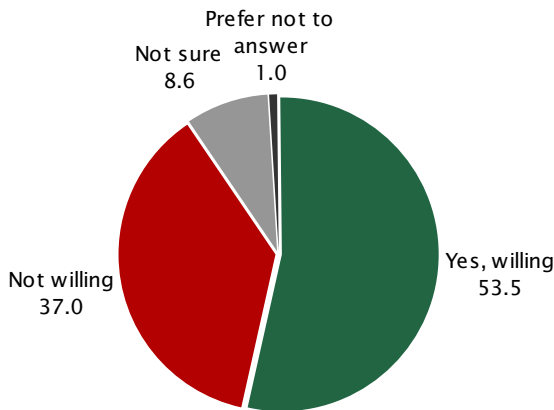


FIGURE 60 WILLING TO AVOID RUSH HOUR TO PAY LOWER TOLL BY YEARS USING 91 EXPRESS LANES & TRIPS ON 91 EXPRESS LANES, MON TO FRI RUSH HOUR

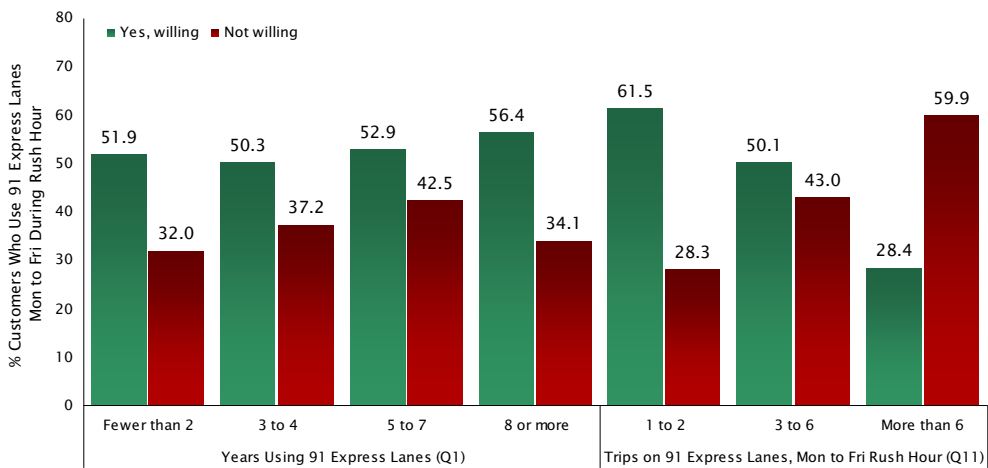
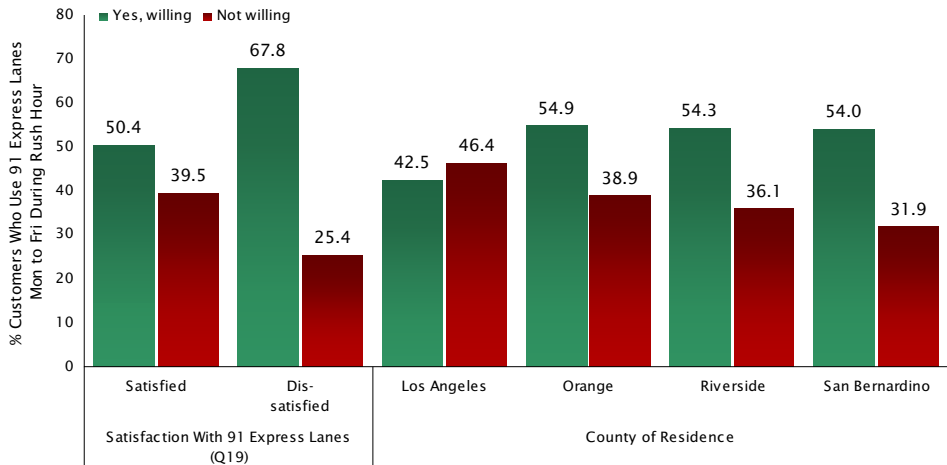


FIGURE 61 WILLING TO AVOID RUSH HOUR TO PAY LOWER TOLL BY SATISFACTION WITH 91 EXPRESS LANES & COUNTY OF RESIDENCE



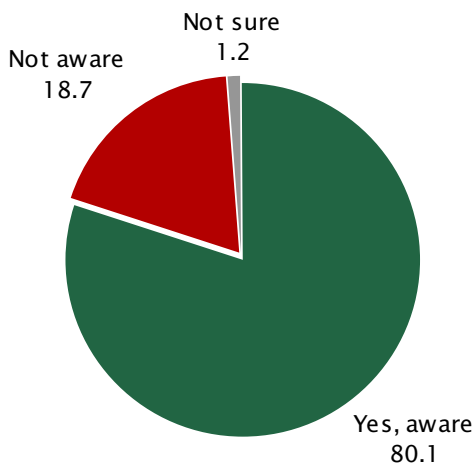
OCTA AND COMMUNICATION

Among the key goals of this survey were to profile 91 Express Lanes customers' awareness and opinions of OCTA's management of the Lanes, identify which OCTA communications they rely on for information about the Lanes, as well as reveal their preferences with respect to future OCTA communications. The results to questions in these topic areas are presented in this section of the report.

WERE YOU AWARE THAT OCTA MANAGES THE 91 EXPRESS LANES? The opening question in this series asked all customers whether, prior to taking the survey, they were aware that the 91 Express Lanes are owned and managed by OCTA. Overall, 80% of customers indicated that they were aware of this fact, whereas 19% stated that they did not know the Lanes were managed by OCTA, and 1% were unsure.

Question 31 *Prior to taking this survey, were you aware that the 91 Express Lanes are owned and managed by the Orange County Transportation Authority, also known as OCTA*

FIGURE 62 AWARE THAT OCTA OWNS & MANAGES 91 EXPRESS LANES



Awareness of OCTA's management role with respect to the 91 Express Lanes was widespread. As shown in Figures 63-64, at least two-thirds of customers in every identified subgroup indicated that they were aware that OCTA manages the 91 Express Lanes prior to taking the survey. As one might expect, awareness was positively related to the number of years a customer had used the Lanes, as well as the frequency with which they use the Lanes.

FIGURE 63 AWARE THAT OCTA OWNS & MANAGES 91 EXPRESS LANES BY YEARS USING 91 EXPRESS LANES & DAYS PER MONTH USING 91 EXPRESS LANES

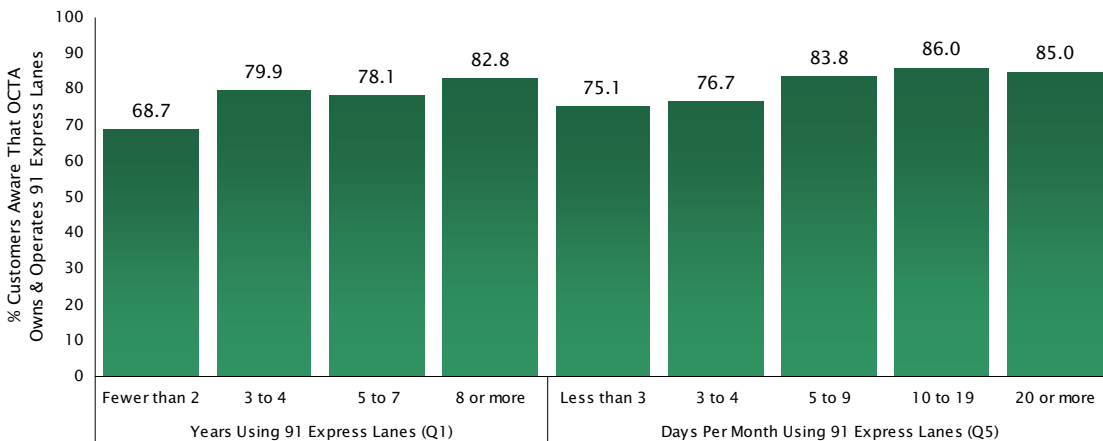


FIGURE 64 AWARE THAT OCTA OWNS & MANAGES 91 EXPRESS LANES BY SATISFACTION WITH 91 EXPRESS LANES, AGE & GENDER

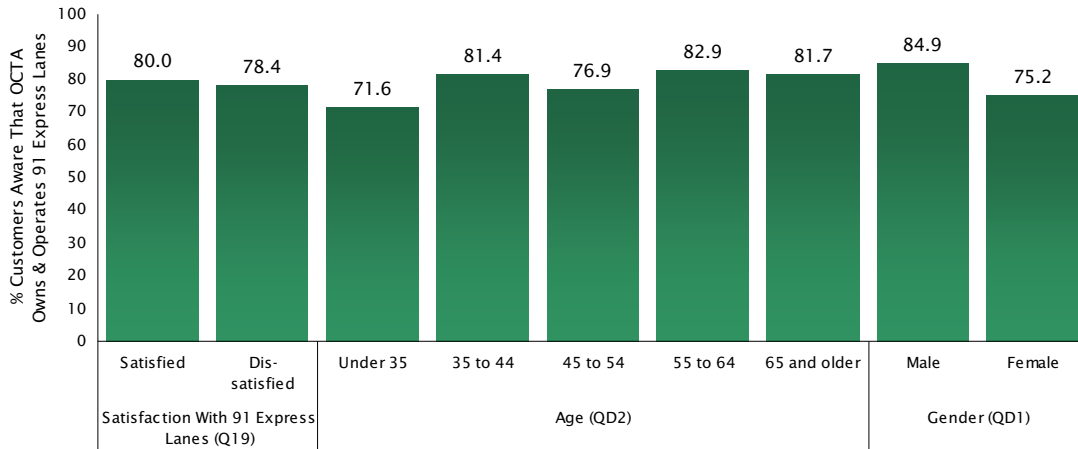
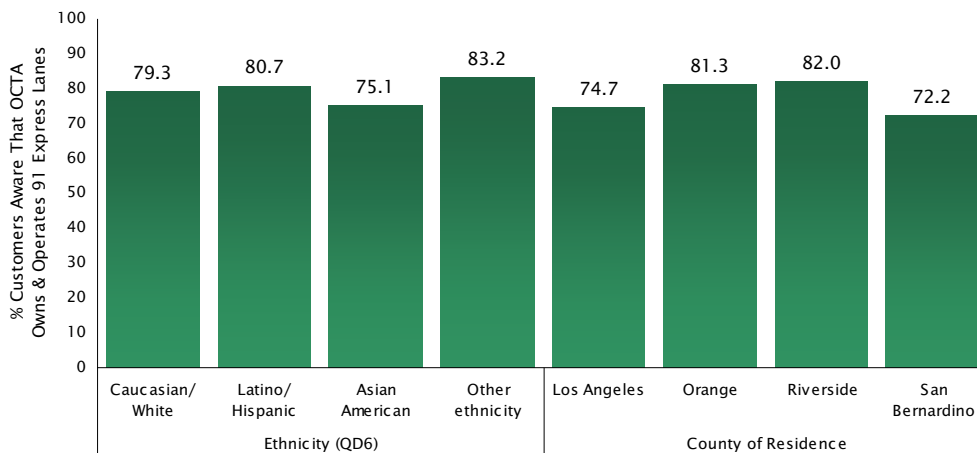


FIGURE 65 AWARE THAT OCTA OWNS & MANAGES 91 EXPRESS LANES BY ETHNICITY & COUNTY OF RESIDENCE

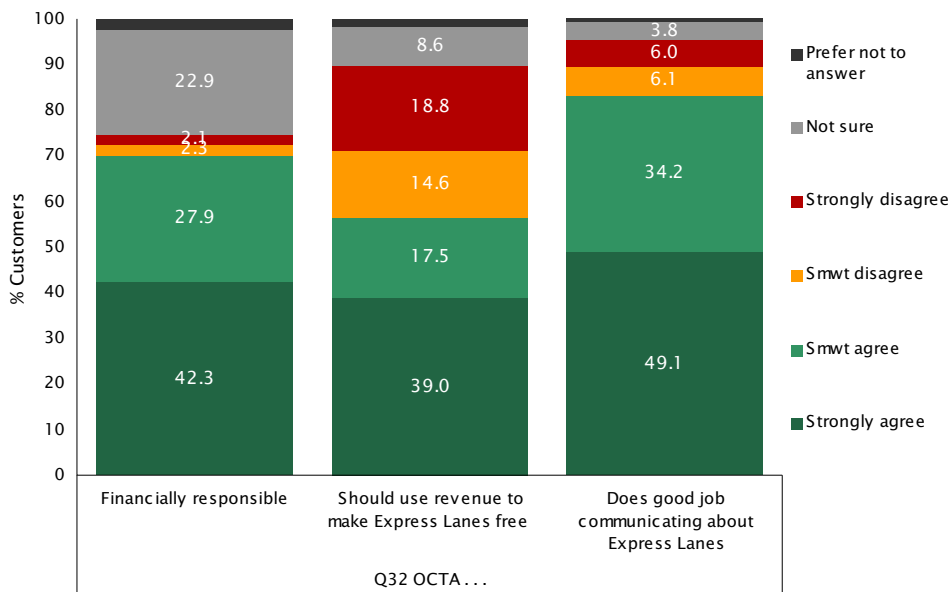


OPINIONS OF OCTA’S MANAGEMENT Regardless of their prior awareness of OCTA’s management role, all customers were next asked several performance-related questions about OCTA and its management of the 91 Express Lanes. The format of Question 32 was straightforward: for each of the statements shown in truncated form at the bottom of Figure 66, customers were simply asked the extent to which they agreed or disagreed with the statement.

Overall, more than two-thirds of customers agreed that *OCTA does a good job communicating with me about the 91 Express Lanes through newsletters, billing inserts, emails, signs and other methods* (83%, 4% unsure) and that *OCTA is financially responsible when managing the 91 Express Lanes* (70% agree, 23% unsure). Customers were more evenly divided with respect to how revenues from the 91 Express Lanes should be used, however. Overall, 57% agreed that *OCTA should use excess toll revenues to repay the construction costs as soon as possible so it can make the 91 Express Lanes free*, whereas 33% disagreed with this statement and 9% were unsure or unwilling to share their opinion.

Question 32 Do you agree or disagree that _____? Would that be strongly (agree/disagree) or somewhat (agree/disagree)?

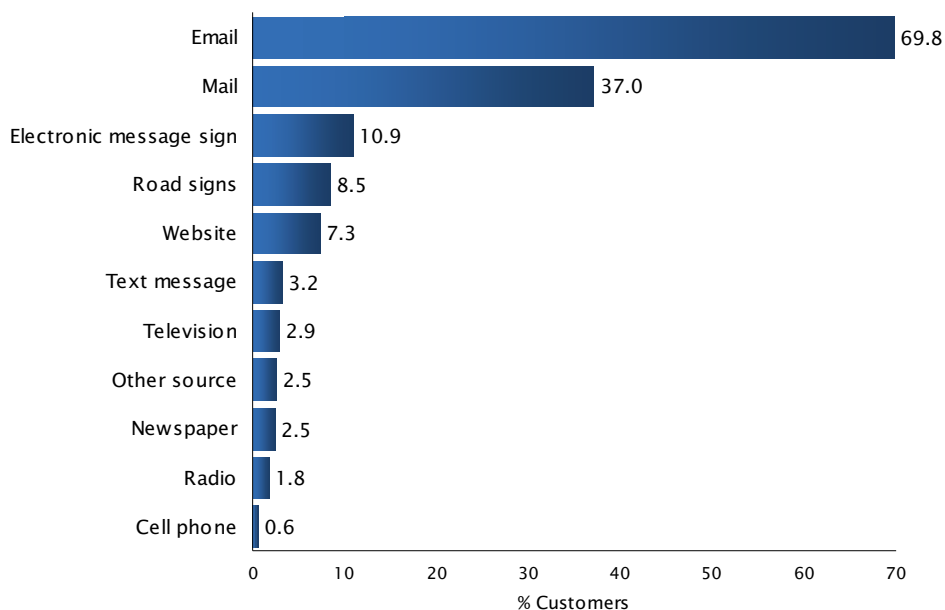
FIGURE 66 AGREEMENT WITH STATEMENTS ABOUT OCTA



PREFERRED METHOD OF COMMUNICATION When asked how they prefer to receive information about the 91 Express Lanes, email was by far the most popular method among existing customers (70%), followed by direct mail (37%). Electronic message signs, road signs, and a website were also mentioned by 11%, 9% and 7% of customers, respectively (see Figure 67).

Question 33 How do you prefer to receive information about the 91 Express Lanes?

FIGURE 67 PREFERENCE FOR RECEIVING 91 EXPRESS LANE INFORMATION



For the interested reader, Tables 3 and 4 show how the preferred method of receiving information about the 91 Express Lanes has changed over time and varied by age and county of residence. Since 2007, there has been a shift in customers' preferences away from direct mail in favor of email. Whereas 44% of customers preferred email in 2007, the percentage has grown to 70% in 2011. Conversely, the percentage of customers who preferred mail has shrunk from 53% to 37% during the same period.

TABLE 3 PREFERENCE FOR RECEIVING 91 EXPRESS LANE INFORMATION BY STUDY YEAR

	Study Year		
	2011	2009	2007
Email	70	52	44
Mail	37	52	53
Electronic message sign	11	2	1
Road signs	8	1	3
Website	7	5	2
Text message	3	0	0
Television	3	1	1
Newspaper	3	1	2
Radio	2	1	1
Cell phone	1	1	1

As one might expect, the preferred method of receiving information about the 91 Express Lanes also varied substantially by age. In general, younger customers displayed a stronger preference for email over any other method when compared to their older counterparts. It should be noted, however, that even among seniors email was still the preferred method of most.

TABLE 4 PREFERENCE FOR RECEIVING 91 EXPRESS LANE INFORMATION BY AGE & COUNTY OF RESIDENCE

	Age (QD2)					County of Residence			
	Under 35	35 to 44	45 to 54	55 to 64	65 and older	Los Angeles	Orange	Riverside	San Bernardino
Email	77.5	89.1	72.9	65.7	54.2	70.9	70.1	68.1	81.2
Mail	31.8	27.1	29.7	43.1	46.0	45.9	37.3	37.4	24.0
Electronic message sign	12.4	13.6	10.2	11.6	8.7	9.1	13.0	9.8	17.9
Road signs	11.4	13.3	6.7	5.9	8.5	4.8	8.6	8.9	11.0
Website	13.1	9.7	4.6	8.3	5.0	4.4	8.1	7.6	7.3
Text message	5.7	7.0	3.3	3.0	1.6	3.3	3.7	3.4	1.7
Television	2.1	1.1	1.5	3.3	4.3	1.7	1.6	3.4	3.1
Other source	2.5	0.0	4.6	3.2	2.3	0.0	0.9	3.2	3.0
Newspaper	1.0	0.6	2.5	2.2	4.9	3.8	1.8	2.8	0.8
Radio	1.0	0.6	1.0	2.5	2.3	1.8	2.6	1.6	1.7
Cell phone	1.1	0.0	0.6	0.4	1.2	0.9	1.4	0.3	1.6

Although most 91 Express Lanes customers prefer to receive information about the Lanes via email, they nevertheless also generally prefer to receive their *billing statements* via mail. As shown in Figure 68 on the next page, 54% of customers indicated that they would prefer to continue receiving their billing statements by mail in the future, 36% indicated that they would prefer to receive their statement via email, 5% preferred to be able to check their statement online, whereas 4% were unsure or unwilling to answer the question. Like communications in general, a preference for receiving billing statements electronically or by mail was strongly related to respondent age (see Figure 69).

Question 34 *In the future, would you prefer to receive your billing statement through the mail, or would you prefer to receive it electronically by email or online?*

FIGURE 68 BILLING STATEMENT PREFERENCE

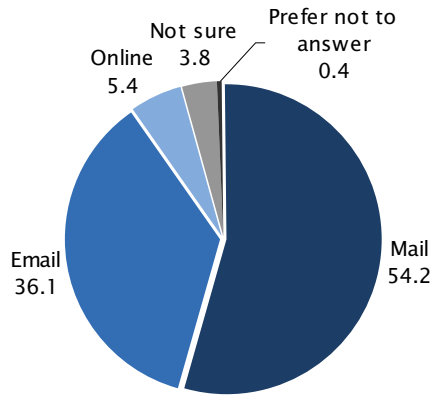
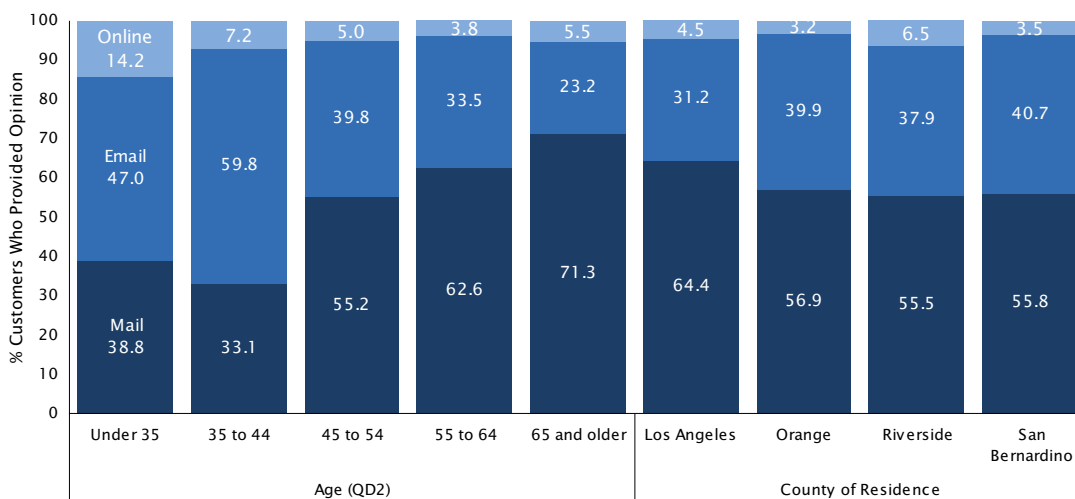


FIGURE 69 BILLING STATEMENT PREFERENCE BY AGE & COUNTY OF RESIDENCE



MONTHLY TOLL CHARGES All customers were next asked to identify the approximate amount they spend per month on toll charges for using the 91 Express Lanes. Approximately one-third of customers indicated that they were unsure (30%) or preferred not to answer the question (3%). Among the remaining respondents, 19% reported spending \$15 or less, 20% between \$16 and \$30, 10% between \$31 and \$50 per month, 11% between \$51 and \$100, and 8% offered that they spend more than \$100 monthly.

Overall, the average total monthly toll charge reported by 91 Express Lanes customers surveyed in this study was \$57.55, which is substantially higher than in prior surveys.¹¹ Its also worth not-

11. Note that True North double-checked the frequency of ridership in the 2011 survey sample against the actual toll charge frequency in the 91 Express Lanes customer database and they match closely. This suggests that perhaps the prior surveys were conducted with a sample that under-represented high-frequency users. Note that respondents to this study did report a higher frequency of trip-making on the 91 Freeway and 91 Express Lanes when compared to prior recent surveys (see *Use of 91 Express Lanes* on page 15).

ing that customers who were dissatisfied with the 91 Express Lanes overall spend a considerably larger amount per month on average when compared to satisfied customers (see Figure 71). The monthly amount of money spent using the 91 Express Lanes was also higher among higher-income households, and among customers who reside in San Bernardino County (see Figure 72).

Question 35 *Approximately how much do you spend per month on toll charges to use the 91 Express Lanes?*

FIGURE 70 AVERAGE DOLLARS SPENT PER MONTH ON 91 EXPRESS LANES

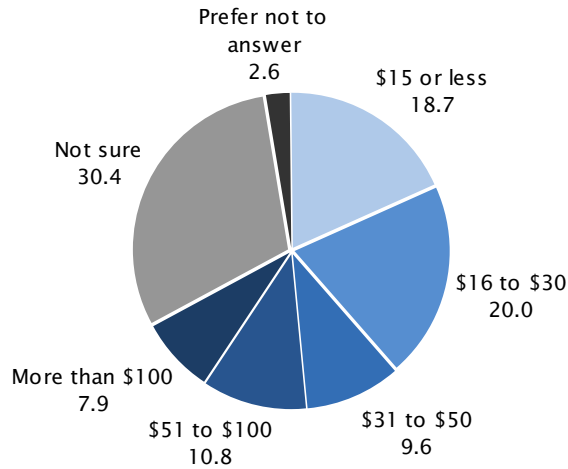


FIGURE 71 AVERAGE DOLLARS SPENT PER MONTH ON 91 EXPRESS LANES BY STUDY YEAR, SATISFACTION WITH 91 EXPRESS LANES & YEARS USING 91 EXPRESS LANES

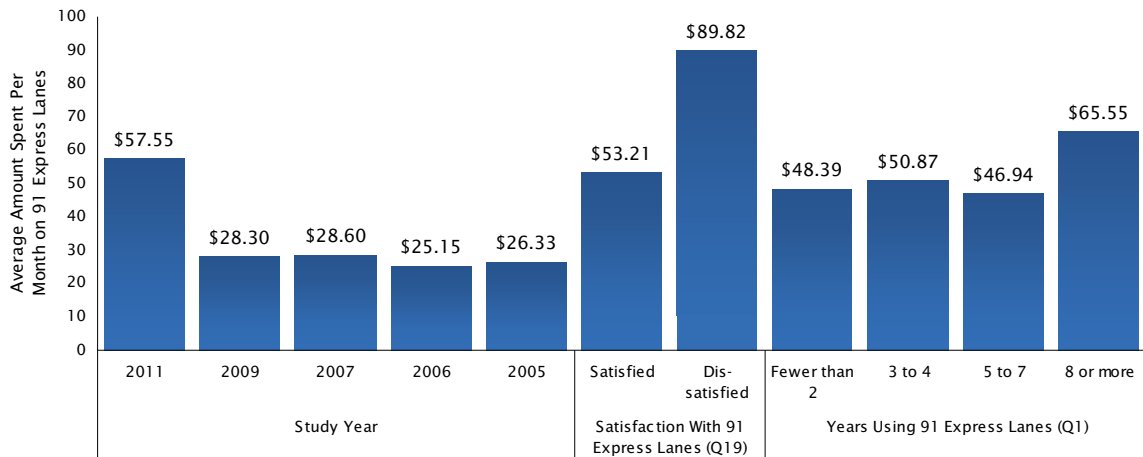
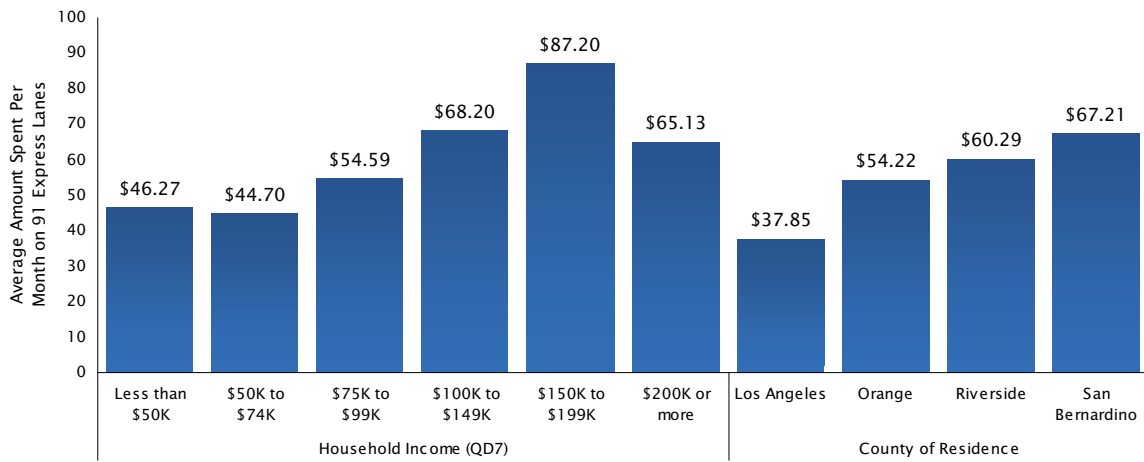


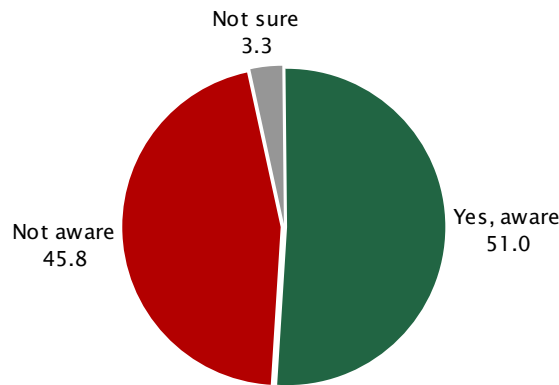
FIGURE 72 AVERAGE DOLLARS SPENT PER MONTH ON 91 EXPRESS LANES BY HOUSEHOLD INCOME & COUNTY OF RESIDENCE



AWARENESS OF TOLL CHARGE REDUCTIONS After asking respondents about their monthly charges for using the 91 Express Lanes, the survey next asked if—prior to taking the survey—they were aware that the toll charge for using the Lanes had decreased during the prior 12 months. Just over half (51%) of customers indicated that they were aware of the toll charge reduction during this period, whereas 46% stated that they were not aware of the reduction and 3% were unsure (Figure 73).

Question 36 *Prior to taking this survey, were you aware that the toll charge for using the 91 Express Lanes has decreased in the past 12 months?*

FIGURE 73 AWARE OF TOLL DECREASE IN PAST 12 MONTHS



Figures 74-76 on the next page show how awareness of the toll charge reduction varied across key customer subgroups. Although the patterns were not consistent for some subgroups, it is noteworthy that awareness generally increased along with the days per month that a customer reported using the 91 Express Lanes and the total amount they spend per month to use the Lanes. Satisfied customers were also more likely than their dissatisfied counterparts to report being aware of the toll charge reduction during the prior 12 months.

FIGURE 74 AWARE OF TOLL DECREASE IN PAST 12 MONTHS BY YEARS USING 91 EXPRESS LANES & DAYS PER MONTH USING 91 EXPRESS LANES

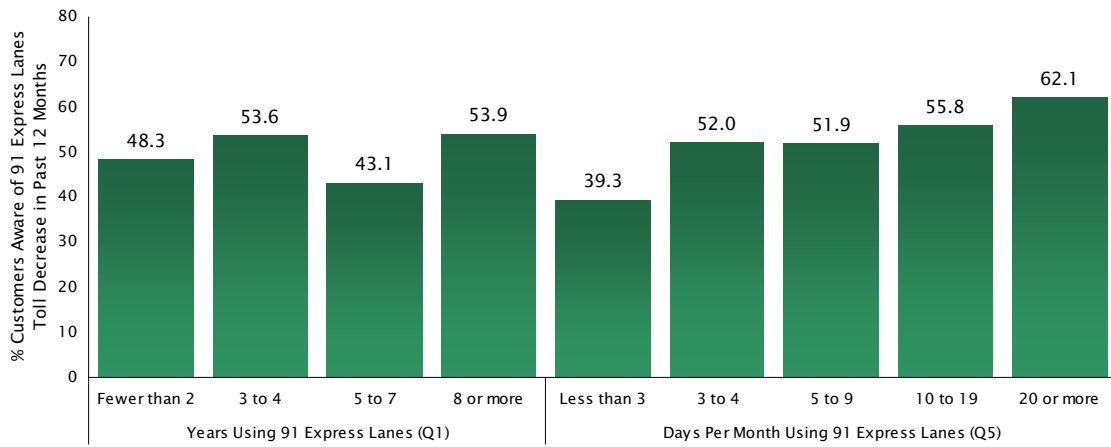


FIGURE 75 AWARE OF TOLL DECREASE IN PAST 12 MONTHS BY SATISFACTION WITH 91 EXPRESS LANES, AGE & COUNTY OF RESIDENCE

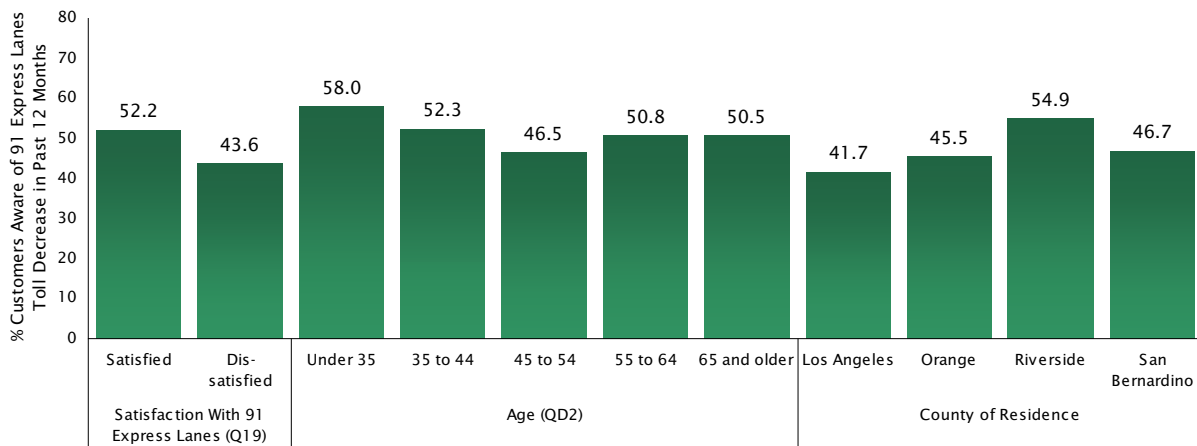
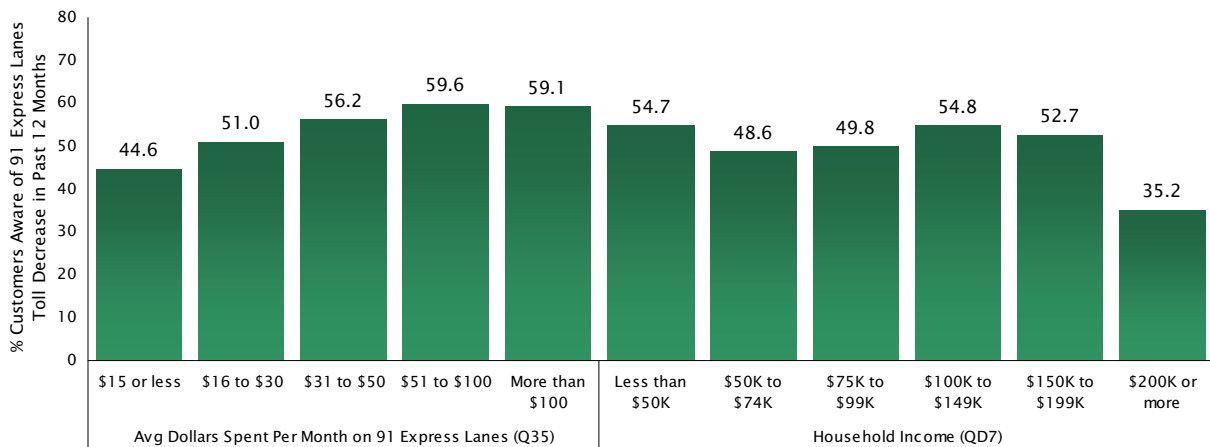


FIGURE 76 AWARE OF TOLL DECREASE IN PAST 12 MONTHS BY AVERAGE DOLLARS SPENT PER MONTH OF 91 EXPRESS LANES & HOUSEHOLD INCOME



HOW DO YOU LEARN ABOUT TOLL CHARGE CHANGES? The final substantive question of the survey asked customers to identify how they generally learn about changes to the toll charges for using the 91 Express Lanes. As shown in Figure 77 below, customers were quite mixed in the ways they generally learn about toll charge changes, with one-third (34%) viewing the change on price signs along the 91 Express Lanes, one-quarter (26%) learning via email notifications, a similar percentage (24%) learning from inserts in their billing statements, 4% via a website, and 7% from ‘other’ sources. For the interested reader, Figures 78 and 79 display how the sources that customers generally rely on for information about toll charge changes varied by the number of years they have used the 91 Express Lanes, number of days per month they typically use the Lanes, age, and county of residence.

Question 37 *How do you generally find out about changes to the toll charges for using the 91 Express Lanes?*

FIGURE 77 SOURCE FOR LEARNING ABOUT CHANGES TO 91 EXPRESS LANES TOLL CHARGES

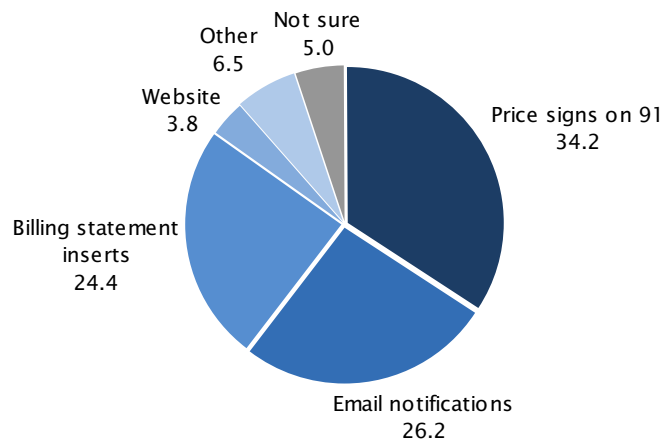


FIGURE 78 SOURCE FOR LEARNING ABOUT CHANGES TO 91 EXPRESS LANES TOLL CHARGES BY YEARS USING 91 EXPRESS LANES & DAYS PER MONTH USING 91 EXPRESS LANES

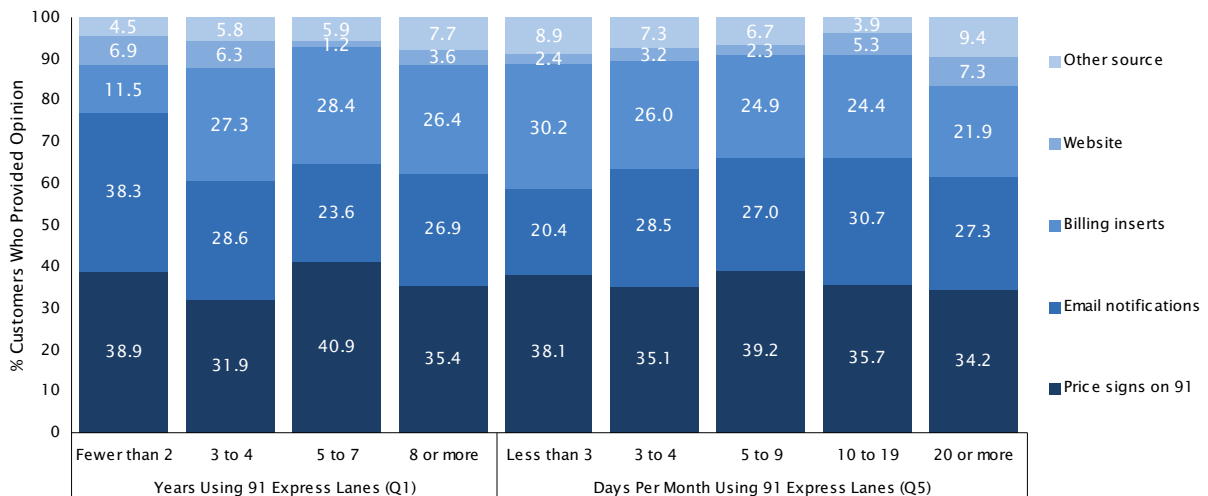
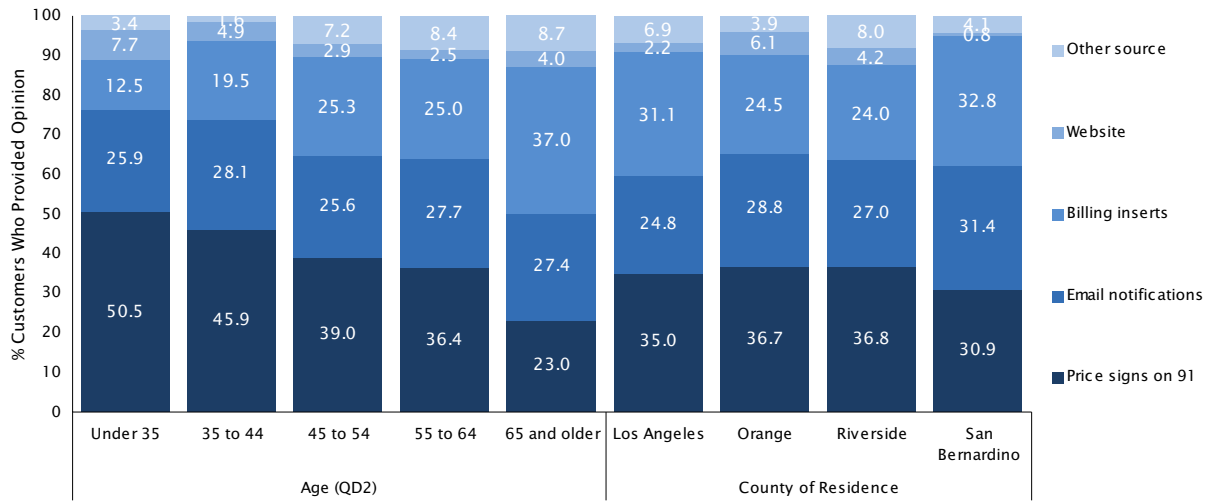


FIGURE 79 SOURCE FOR LEARNING ABOUT CHANGES TO 91 EXPRESS LANES TOLL CHARGES BY AGE & COUNTY OF RESIDENCE





BACKGROUND & DEMOGRAPHICS

TABLE 5 DEMOGRAPHICS OF SAMPLE

Total Respondents	1000
Q1 Years using 91 Express Lanes	
Less than 1	3.9
1 to 2	7.9
3 to 4	11.6
5 to 7	19.6
8 or more	54.0
Not sure	3.0
Prefer not to answer	0.1
QD1 Gender	
Male	47.7
Female	51.0
Prefer not to answer	1.3
QD2 Age	
18 to 24	1.0
25 to 34	6.5
35 to 44	13.0
45 to 54	23.2
55 to 64	25.2
65 and older	20.1
Prefer not to answer	10.9
QD3 Employment status	
Employed full time	60.5
Employed part time	6.4
Student	1.6
Homemaker	3.6
Retired	23.1
Between jobs	2.3
Prefer not to answer	2.5
QD4 Education level	
Some high school	2.4
High school grad	10.4
Tech / Voc	3.5
Some college	28.0
College grad	26.5
Some grad school	4.1
Graduate degree	20.4
Prefer not to answer	4.7
QD5 a OCTA's OC Express bus service	
Yes, used	2.1
Have not used	95.5
Prefer not to answer	2.4
QD5 b OCTA's regular bus service	
Yes, used	9.0
Have not used	89.0
Prefer not to answer	2.0
QD5 c Metrolink weekday service	
Yes, used	16.2
Have not used	81.6
Prefer not to answer	2.2
QD5 d Metrolink weekend service	
Yes, used	14.0
Have not used	84.0
Prefer not to answer	1.9
QD6 Ethnicity	
Caucasian/White	68.9
Latino/Hispanic	11.0
African American/Black	3.0
American Indian	0.3
Asian American	4.0
Pacific Islander	0.2
Mixed heritage	1.5
Not sure	1.9
Prefer not to answer	9.2
QD7 Household income	
Less than \$25K	2.0
\$25K to \$49K	6.9
\$50K to \$74K	14.2
\$75K to \$99K	17.0
\$100K to \$149K	19.5
\$150K to \$199K	10.5
\$200K or more	6.1
Not sure	2.4
Prefer not to answer	21.4

Table 5 presents the key demographic and background information that was collected during the survey interview. Because of the stratified probability-based sampling methodology used in creating the sample (see *Methodology* on page 57), the results shown are representative of current 91 Express Lanes customers who use the Lanes at least once per month on average.

Although the primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by customer characteristics (see crosstabulations in Appendix A for a full breakdown of each question), the information is also valuable for understanding the current profile of 91 Express Lanes customers.



M E T H O D O L O G Y

The following sections outline the mixed-methodology survey design used in this study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with OCTA to develop a questionnaire that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias in responses, the items were asked in a random order for each respondent.

Several questions asked in this study were presented only to a subset of respondents. For example, only respondents who reported that they use toll roads in Southern California in addition to the 91 Express Lanes (Question 6) were asked to name the toll roads they use (Question 7). The questionnaire included with this report (see *Questionnaire & Toplines* on page 60) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

Several of the questions asked in the 2011 survey were also tracked directly from the 2009 customer survey to allow OCTA to track customer opinions and behavior over time.

PROGRAMMING, PRE-TEST & TRANSLATION Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist the live interviewers when conducting the telephone interviews, as well as web programmed to allow online participation. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts the interviewer to certain types of keypunching mistakes should they happen during the interview. The integrity of the questionnaire was pre-tested internally by True North and by dialing a small sample of customers prior to formally beginning the survey. Once finalized, the survey was also professionally translated into Spanish.

SAMPLE To ensure a representative sample, we first stratified the customer database on relevant customer characteristics—including frequency of using the 91 Express Lanes, location of residence, and availability of contact information to ensure proper representation of customer subgroups. Stratifying the sample in this manner prior to randomly selecting customers into their appropriate strata ensures that the final sample includes the correct proportion of customers in each strata and is representative of the 91 Express Lane customer base. Additionally, for demographic characteristics that are *not* coded on OCTA's customer database but are relevant to the objectives of this study (e.g., gender), the variables were monitored throughout the data collection period to ensure they were within acceptable ranges.

Given OCTA's interest in having statistically reliable results for customers overall—as well as within customer segments according to their usage patterns—we employed a large sample of 1,000 customers. As described below, a sample of this size will produce statistically reliable results for customers overall, as well as within specific customer segments.

MARGIN OF ERROR DUE TO SAMPLING By using a stratified random sample and monitoring the sample characteristics as data collection proceeded, True North ensured that the sample was representative of 91 Express Lanes customers who had used the Lanes at least 12 times during the prior 12 month period. The results of the sample can thus be used to estimate the opinions of *all* customers who fit this profile. Because not *every* 91 Express Lanes customer participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 1,000 customers for a particular question and what would have been found if all of the estimated 64,398 customers who fit the desired profile had been interviewed.

For example, in estimating the percentage of customers who were aware that OCTA manages the 91 Express Lanes (Question 31), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence level, and the distribution of responses to the question. The appropriate equation for estimating the margin of error, in this case, is shown below:

$$\hat{p} \pm t \sqrt{\left(\frac{N-n}{N}\right) \frac{\hat{p}(1-\hat{p})}{n-1}}$$

where \hat{p} is the portion of customers who were aware of OCTA's management role (0.8 for 80% in this example), N is the population size of all customers who fit the profile for the study (64,398), n is the sample size that received the question (1,000), and t is the upper $\alpha/2$ point for the t-distribution with $n-1$ degrees of freedom (1.96 for a 95% confidence interval). Solving the equation using these values reveals a margin of error of $\pm 2.46\%$. This means that with 80% of survey respondents indicating they were aware that OCTA manages the 91 Express Lanes, we can be 95% confident that the actual percentage of all customers who are aware of OCTA's management role is between 77.5% and 82.5%.

FIGURE 80 MAXIMUM MARGIN OF ERROR

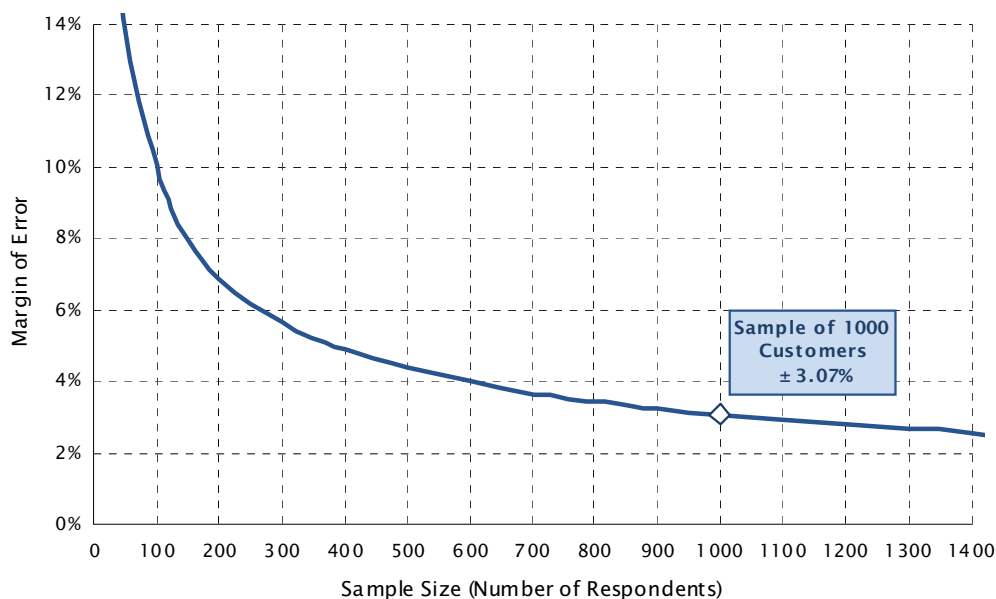


Figure 80 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response (i.e., $\hat{p} = 0.5$). For this survey, the maximum margin of error is $\pm 3.07\%$ for questions answered by all 1,000 respondents.

Within this report, figures and tables show how responses to certain questions varied by customer characteristics such as employment status, location of residence, and frequency of using the 91 Express Lanes. Figure 80 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. The main motivation for using a larger sample for this study was that it will produce statistically reliable results for customers as a whole, as well as within most customer subgroups. For example, even if the sample is divided into four subgroup samples of 250 individuals per group, the results would still have an acceptable margin of error of approximately $\pm 6\%$ at the subgroup level.

DATA COLLECTION This study employed a mixed-method design that allowed respondents maximum flexibility in choosing *when* and *how* they participate in the study. The mixed-method approach involved allowing respondents (once selected at random via the stratified sampling methodology) the option to participate in the survey by telephone or online through a secure, password protected web-based application designed and hosted by True North. By providing respondents with flexibility as to when and how they participate in the survey, a mixed-method approach will deliver higher participation rates, minimize response bias, and ultimately deliver more reliable results than using telephone-only based data collection methodologies.

Customers whose records included email and telephone contact information were recruited using both email invitations and telephone calls (land lines and cell phones). Customers whose records included just telephone contact information were recruited by telephone, but could also choose to participate either by telephone or online. Of the 1,000 completed interviews, 630 were completed online and 370 were completed via telephone—which is also representative of the distribution of customers with and without email contact information.

Data collection occurred between September 19 and September 26, 2011, with telephone calls being conducted on weekday evenings and weekends. It is standard practice not to call during the day on weekdays because most working adults are unavailable and thus calling during those hours would bias the sample. The interviews averaged 15 minutes in length.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing open-ended responses, and preparing frequency analyses and crosstabulations.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and pie charts for a given question.

QUESTIONNAIRE & TOPLINES



OCTA
91 Express Lanes Customer Survey
Final Toplines
October 2011

Section 1: Introduction to Study

Hi, my name is _____, and I'm calling on behalf of TNR, an independent public opinion research firm. We're conducting a brief survey of households that have a FasTrak transponder and use the 91 Express Lanes, and we would like to get your opinions.

If needed: This is a survey only. I'm NOT trying to sell anything and I won't ask for a donation.

If needed: The survey should take about 12 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back?

If the person asks who is sponsoring the survey, explain: For statistical purposes, I can't reveal the sponsor of the survey at the beginning of this interview, but I will tell you at the end.

Section 2: Screeners for Inclusion in the Study

SC1	For statistical reasons, I would like to speak to the person in your household who uses the FasTrak transponder most often on the 91 Express Lanes or similar toll roads. Are you that person?	
	1	Yes <i>Skip to SC3</i>
	2	No <i>Go to SC2</i>
	3	Hsld doesn't have FasTrak transponder <i>Terminate</i>
SC2	May I please speak with that person?	
	1	Yes <i>Switch to that person and go to SC3</i>
	2	No <i>Arrange for callback time and terminate</i>
SC3	In the past 12 months, have you used the 91 Express Lanes at least 12 times? In other words, in a typical month you use the 91 Express Lanes at least once. <i>If unsure, ask them to estimate.</i>	
	1	Yes <i>Go to intro preceding Q1</i>
	2	No <i>Terminate</i>

Section 3: FasTrak Decisions

To begin, I have a few questions about your FasTrak account.

Q1	For how many years have you been using the 91 Express Lanes toll road?	
	1	Less than 1 year 4%
	2	1 to 2 years 8%
	3	3 to 4 years 12%
	4	5 to 7 years 20%
	5	8 years or more 54%
	98	Not sure 3%
	99	Prefer not to Answer 0%

Q2 How many FasTrak transponders do you currently have in your household?		
1	One	62%
2	Two	28%
3	Three	6%
4	Four or more	4%
98	Not sure	0%
99	Prefer not to Answer	0%
Q3 How did you acquire the FasTrak transponder you use when traveling on the 91 Express Lanes? Did you pick it up in person at the OCTA store in Orange, in person at the Customer Service Center in Corona, order it by phone and have it mailed to you, or did you order it over the Internet?		
1	In person at OCTA in Orange	4%
2	In person at Customer Service Center in Corona	40%
3	By telephone	33%
4	By Internet	12%
5	Other	6%
98	Not sure	5%
99	Prefer not to Answer	0%
Q4 Which of the following best describes who pays your toll charges when you use the 91 Express Lanes?		
1	You pay your tolls	88%
2	Another family member pays your tolls	4%
3	Your employer pays your tolls either directly or by reimbursing you	6%
4	Other	2%
98	Not sure	0%
99	Prefer not to Answer	0%

Section 4: Use of 91 Express Lanes

Next, I have a few questions about your travel habits.

Q5 In a typical month, how many days do you use the 91 Express Lanes toll road? *If unsure, ask them to estimate. Average per customer = 7.66 days per month.*

Less than 3	22%
3 to 4	23%
5 to 9	22%
10 to 19	13%
20 or more	14%
Not sure	7%
Prefer not to answer	1%

Q6 In a typical month, do you use any other toll roads in Southern California?

1	Yes	42%	Ask Q7
2	No	56%	Skip to Q8
98	Not sure	1%	Skip to Q8
99	Prefer not to answer	0%	Skip to Q8

Q7 Which other toll roads do you use in a typical month? *Check all that apply.*

1	241 Toll Road	81%
2	73 Toll Road	27%
3	261 Toll Road	34%
4	133 Toll Road	24%
5	Toll Road portion of Interstate 15	14%
98	Not sure	3%
99	Prefer not to Answer	0%

Q8	In a typical week, how many one-way trips do you take on the 91 Freeway? Please count all trips, including trips when you use the 91 Express Lanes toll road and those when you don't. <i>If unsure, ask respondent to please estimate. Average per customer = 4.19 one-way trips.</i>	
	None	27%
	1 to 2	25%
	3 to 6	15%
	More than 6	17%
	Not sure	14%
	Prefer not to answer	1%
Q9	Of the <i><trips from Q8></i> one-way trips you take on the 91 Freeway in a typical week, approximately how many do you use the 91 Express Lanes toll road? Percentage of all respondents shown below. <i>Average per customer = 2.71 one-way trips.</i>	
	None	30%
	1 to 2	30%
	3 to 6	14%
	More than 6	8%
	Not sure	18%
	Prefer not to answer	1%
Q10	Of the <i><trips from Q9></i> one-way trips you use the 91 Express Lanes toll road in a typical week, how many do you take Monday through Friday? Percentage of all respondents shown below. <i>Average per customer = 2.17 one-way trips.</i>	
	None	36%
	1 to 2	25%
	3 to 6	12%
	More than 6	6%
	Not sure	20%
	Prefer not to answer	1%
Q11	Of the <i><trips from Q10></i> one-way trips you use the 91 Express Lanes toll road between Monday and Friday, how many do you take during rush hour periods, between 5AM and 9AM, or 3PM and 7PM? Percentage of all respondents shown below. <i>Average per customer = 1.81 one-way trips.</i>	
	None	44%
	1 to 2	19%
	3 to 6	9%
	More than 6	5%
	Not sure	22%
	Prefer not to answer	1%

Q12 Do you use the 91 Express Lanes toll road for: _____?				
	<i>Randomize</i>	Yes	No	Not sure / Prefer not to answer
A	Commuting to or from work	46%	53%	1%
B	Commuting to or from school	3%	96%	1%
C	Shopping or recreation trips	67%	33%	1%
D	Visiting friends or family	68%	31%	1%
<i>If Q12a = 1 ask Q13 and Q14.</i>				
Q13 In what city do you typically begin your commute to work? City recorded, recoded into County categories as shown below.				
	Los Angeles		5%	
	Orange		8%	
	Riverside		75%	
	San Bernardino		7%	
	Other		1%	
	Varies / Multiple counties		<1%	
	Not sure		1%	
	Prefer not to answer		3%	
Q14 What is the destination city for your work commute? City recorded, recoded into County categories as shown below.				
	Los Angeles		22%	
	Orange		58%	
	Riverside		7%	
	San Bernardino		1%	
	Other		1%	
	Varies / Multiple counties		3%	
	Not sure		3%	
	Prefer not to answer		4%	

<i>If Q12a = (2,99) and Q12b = 1, ask Q15 and Q16.</i>	
Q15	In what city do you typically begin your commute to school? City recorded for 8 respondents who received the question.
	Data on file for 8 respondents
Q16	What is the destination city for your school commute? City recorded for 8 respondents who received the question.
	Data on file for 8 respondents
<i>If Q12a = (2,99) and Q12b = (2,99), ask Q17 and Q18.</i>	
Q17	In what city do you typically begin your trips that involve using the 91 Express Lanes toll road? City recorded, recoded into County categories as shown below.
	Los Angeles 13%
	Orange 27%
	Riverside 49%
	San Bernardino 7%
	Other 1%
	Varies / Multiple counties <1%
	Not sure 3%
	Prefer not to answer 1%
Q18	What is the destination city that you are most often traveling to when you use the 91 Express Lanes? City recorded, recoded into County categories as shown below.
	Los Angeles 13%
	Orange 39%
	Riverside 26%
	San Bernardino 4%
	Other 6%
	Varies / Multiple counties 2%
	Not sure 7%
	Prefer not to answer 2%

Section 5: Opinions of 91 Express Lanes

Next, I have a few questions about your experiences when traveling on the 91 Express Lanes toll road.

Q19	Overall, are you satisfied or dissatisfied with your experiences when using the 91 Express Lanes? <i>Get answer, then ask:</i> Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?			
	1	Very satisfied	51%	Ask Q20
	2	Somewhat satisfied	39%	Ask Q20
	3	Somewhat dissatisfied	5%	Ask Q20
	4	Very dissatisfied	4%	Ask Q20
	98	Not sure	1%	Skip to Q21
	99	Prefer not to Answer	0%	Skip to Q21
Q20	Is there a particular reason why you are (satisfied/dissatisfied)?			
		Saves time / Faster travel	29%	
		Bypass traffic, traffic jams	27%	
		No reason in particular	19%	
		Too expensive	9%	
		Easy to use / Convenience	7%	
		Too much traffic on Express Lanes	6%	
		Feel safer using Express Lanes	2%	
		Express Lanes are well maintained	2%	
		Express Lanes should be extended	2%	
		Easy access to destinations	1%	
		Never had any problems	1%	
		Lanes are not over crowded	1%	
		Cost is reasonable	1%	
		Poor customer service	1%	
		Occasional Express Lanes closures	1%	
		Good customer service	1%	
		Cars cutting from freeway into Express Lanes	1%	
		Express Lanes in need of maintenance	1%	
		Appreciate 3+ passenger lanes	1%	
		Transponder issues	1%	
		Drivers abusing 3+ passenger lanes	<1%	
		Should be credited if traffic is too congested	<1%	

Q21 Please tell me how important the following standards of service are to you as a 91 Express Lanes customer. Would you say it is extremely important, very important, somewhat important, or not at all important to you that: _____?							
	<i>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not at all Important	No Opinion	Prefer not to answer
A	The 91 Express Lanes is a fast way to travel	58%	34%	6%	0%	0%	1%
B	The 91 Express Lanes is a safe way to travel	51%	35%	10%	2%	1%	0%
C	You save time when using the 91 Express Lanes	66%	29%	4%	0%	0%	0%
D	It's less stressful when using the 91 Express Lanes	54%	34%	9%	1%	1%	1%
E	You create less wear and tear on your vehicle when using the 91 Express Lanes	33%	33%	20%	9%	4%	1%
F	You can reliably estimate your travel times when using the 91 Express Lanes	40%	39%	16%	2%	2%	1%
G	It is easy to get in touch with a 91 Express Lanes customer service representative when needed	34%	37%	15%	5%	8%	2%
H	If you have an issue, 91 Express Lanes customer service responds to it in a timely manner	42%	34%	11%	3%	9%	2%
I	The tolls you pay are used to help improve the 91 Freeway	30%	31%	24%	10%	4%	1%
J	The convenience you receive from using the 91 Express Lanes is worth the cost	48%	33%	13%	3%	2%	1%
K	You are treated professionally by 91 Express Lanes customer service	42%	37%	12%	3%	6%	1%
L	Your billing statements are accurate	57%	32%	6%	1%	2%	1%
M	The 91 Express Lanes toll road is well maintained and in good condition	48%	42%	9%	1%	1%	1%
Q22 Do you agree or disagree that _____? Would that be strongly (agree/disagree) or somewhat (agree/disagree)?							
	<i>Randomize</i>	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	No Opinion	Prefer not to answer
A	The 91 Express Lanes is a fast way to travel	64%	31%	3%	1%	0%	1%
B	The 91 Express Lanes is a safe way to travel	55%	34%	5%	3%	2%	1%
C	You save time when using the 91 Express Lanes	68%	28%	3%	1%	0%	1%
D	It's less stressful when using the 91 Express Lanes	64%	28%	5%	2%	1%	1%

E	You create less wear and tear on your vehicle when using the 91 Express Lanes	44%	36%	9%	4%	6%	1%
F	You can reliably estimate your travel times when using the 91 Express Lanes	42%	43%	10%	3%	2%	1%
G	It is easy to get in touch with a 91 Express Lanes customer service representative when needed	41%	29%	8%	10%	11%	2%
H	If you have an issue, 91 Express Lanes customer service responds to it in a timely manner	46%	28%	6%	5%	13%	2%
I	The tolls you pay are used to help improve the 91 Freeway	29%	36%	9%	6%	19%	1%
J	The convenience you receive from using the 91 Express Lanes is worth the cost	43%	34%	11%	10%	1%	1%
K	You are treated professionally by 91 Express Lanes customer service	53%	29%	3%	2%	12%	1%
L	Your billing statements are accurate	61%	29%	3%	1%	5%	1%
M	The 91 Express Lanes toll road is well maintained and in good condition	55%	38%	4%	2%	1%	1%
Q23	About how much time do you think you save for a typical one-way trip during the morning rush hour when you travel on the 91 Express Lanes? Average per customer who uses 91 Express Lanes during morning rush hour = 27.58 minutes.						
	Less than 15 minutes						8%
	15 to 24 minutes						17%
	25 to 34 minutes						16%
	35 or more minutes						11%
	Do not use during these times						39%
	Not sure						9%
	Prefer not to answer						1%
Q24	About how much time do you think you save for a typical one-way trip during the afternoon rush hour when you travel on the 91 Express Lanes? Average per customer who uses 91 Express Lanes during afternoon rush hour = 34.24 minutes.						
	Less than 15 minutes						4%
	15 to 24 minutes						20%
	25 to 34 minutes						22%
	35 or more minutes						25%
	Do not use during these times						20%
	Not sure						8%
	Prefer not to answer						0%

Section 6: Improvements to 91 Express Lanes			
Q25	If you could improve one aspect of the 91 Express Lanes road or customer service, what change would you most like to see?		
	Reduce fees		34%
	Extend the Express Lanes		16%
	No changes needed		13%
	Decrease wait times for customer service		8%
	Not sure / Cannot think of anything		6%
	Prevent illegal lane changes		5%
	Improve real time communications about traffic, maintenance		4%
	Perform road maintenance at night		3%
	Improve website		2%
	Improve road maintenance		2%
	Improve Express Lanes entrances/exits		2%
	Better monitor, reduce traffic speed		1%
	Do not issue tickets on Express Lanes		1%
	Issue credit when toll lanes are closed		1%
	Limit, reduce traffic jams		1%
	Improve billing statements		1%
	Additional CHP to enforce laws		1%
	Additional barriers, cones to direct traffic flow		1%
	Provide pull-out areas for breakdowns		<1%
	Provide additional transponders for multiple vehicles		<1%
	Improved communication with other toll roads		<1%
Q26	There are plans to extend the 91 Express Lanes east to Interstate 15. Once completed, would you use this new section of the 91 Express Lanes?		
	1	Yes	81% Ask Q27
	2	No	11% Skip to Q28
	98	Not sure	8% Skip to Q28
	99	Prefer not to answer	0% Skip to Q28

Q27	Would you use it when traveling both directions, or just east or west?		
	1	Both directions	89%
	2	East	8%
	3	West	2%
	98	Not sure	2%
	99	Prefer not to answer	0%
Q28	There are also plans for a future direct connection between the 91 Express Lanes and the 241 toll road. Do you support or oppose plans to build this connection, or do you have no opinion either way? <i>Get answer, then ask: Would that be strongly (support/oppose) or somewhat (support/oppose)?</i>		
	1	Strongly support	40%
	2	Somewhat support	14%
	3	Strongly oppose	5%
	4	Somewhat oppose	3%
	98	Not sure	35%
	99	Prefer not to answer	3%
Q29	The toll charge on the 91 Express Lanes is set so that traffic is free flowing. If the fee is set too low, it will lead to traffic congestion. Do you favor this policy of maintaining free flow driving conditions in the Express Lanes, even if it means paying a higher toll at times?		
	1	Yes	56%
	2	No	28%
	98	Not sure	15%
	99	Prefer not to answer	1%
<i>Only ask Q30 if Q11 is at least one trip.</i>			
Q30	Would you be willing to alter your daily travel schedule to avoid rush hour if the toll for using the 91 Express Lanes was lower just before and after rush hour?		
	1	Yes	53%
	2	No	37%
	98	Not sure	9%
	99	Prefer not to answer	1%

Section 7: OCTA and Communication								
Q31	Prior to taking this survey, were you aware that the 91 Express Lanes are owned and managed by the Orange County Transportation Authority, also known as OCTA (Oh-See-Tee-Ay)?							
	1	Yes						80%
	2	No						19%
	98	Not sure						1%
	99	Prefer not to answer						0%
Q32	Do you agree or disagree that _____? Would that be strongly (agree/disagree) or somewhat (agree/disagree)?							
	<i>Randomize</i>		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	No Opinion	Prefer not to answer
A	OCTA is financially responsible when managing the 91 Express Lanes		42%	28%	2%	2%	23%	2%
B	OCTA should use excess toll revenues to repay the construction costs as soon as possible so it can make the 91 Express Lanes free		39%	18%	15%	19%	9%	2%
C	OCTA does a good job communicating with me about the 91 Express Lanes through newsletters, billing inserts, emails, signs and other methods		49%	34%	6%	6%	4%	1%
Q33	How do you prefer to receive information about the 91 Express Lanes? <i>Multiple Responses Allowed.</i>							
	1	Mail						37%
	2	Email						70%
	3	Website						7%
	4	Electronic Message Sign						11%
	5	Road Signs						8%
	6	Cell Phone						1%
	7	Text Message						3%
	8	Newspaper						3%
	9	Radio						2%
	10	Television						3%
	11	Other (unique responses)						3%
	98	Not sure						2%
	99	Prefer not to answer						0%

Q34	In the future, would you prefer to receive your billing statement through the mail, or would you prefer to receive it electronically by email or online?		
	1	Mail	54%
	2	Email	36%
	3	Online	5%
	98	Not sure	4%
	99	Prefer not to answer	0%
Q35	Approximately how much do you spend per month on toll charges to use the 91 Express Lanes? Average spent per month among customers who provided response = \$57.55.		
		\$15 or less	19%
		\$16 to \$30	20%
		\$31 to \$50	10%
		\$51 to \$100	11%
		More than \$100	8%
		Not sure	30%
		Prefer not to answer	3%
Q36	Prior to taking this survey, were you aware that the toll charge for using the 91 Express Lanes has decreased in the past 12 months?		
	1	Yes	51%
	2	No	46%
	98	Not sure	3%
	99	Prefer not to Answer	0%
Q37	How do you generally find out about changes to the toll charges for using the 91 Express Lanes?		
	1	Website	4%
	2	Price signs on 91	34%
	3	Notifications sent by email	26%
	4	Inserts in my billing statement	24%
	5	Other	6%
	98	Not sure	5%
	99	Prefer not to answer	0%

Section 9: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1	Gender (record by voice in telephone interview)		
	1	Male	48%
	2	Female	51%
	99	Prefer not to answer	1%
D2	In what year were you born? Year recorded and grouped into age categories as shown below.		
	1	18 to 24	1%
	2	25 to 34	6%
	3	35 to 44	13%
	4	45 to 54	23%
	5	55 to 64	25%
	6	65 and over	20%
	99	Prefer not to answer	11%
D3	Which of the following best describes your employment status? Would you say you are employed full-time, part-time, a student, a homemaker, retired, or are you in-between jobs right now?		
	1	Employed full-time	61%
	2	Employed part-time	6%
	3	Student	2%
	4	Homemaker	4%
	5	Retired	23%
	6	In-between jobs	2%
	99	Refused	2%

D4		What is the last grade or level you completed in school?			
	1	Elementary (8 or fewer years)	0%		
	2	Some high school (9 to 11 years)	2%		
	3	High school graduate (12 years)	10%		
	4	Technical / Vocational school	4%		
	5	Some college	28%		
	6	College graduate	26%		
	7	Some graduate school	4%		
	8	Graduate, professional, doctorate degree (DDS, DVM, JD, LLM, MA, MS, MBA, MD, PhD)	20%		
	99	Prefer not to answer	5%		
D5		As I read the following transportation services, please tell me whether you have used them in the past.			
		<i>Randomize</i>	Yes	No	Not sure / Refused
A		OCTA's OC Express bus service	2%	95%	2%
B		OCTA's regular bus service	9%	89%	2%
C		Metrolink weekday service	16%	82%	2%
D		Metrolink weekend service	14%	84%	2%
D6		What ethnic group do you consider yourself a part of or feel closest to? <i>Read list if respondent hesitates.</i>			
	1	Caucasian/White	69%		
	2	Latino/Hispanic/Mexican	11%		
	3	African-American/Black	3%		
	4	American Indian or Alaskan Native	0%		
	5	Asian—Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian	4%		
	6	Pacific Islander	0%		
	7	Mixed Heritage	1%		
	98	Other	2%		
	99	Prefer not to answer	9%		

D7	This last question is for statistical purposes only. As I read the following income categories, please stop me when I reach the category that best represents your household's total annual income before taxes.		
	1	Less than \$25,000	2%
	2	\$25,000 to \$49,999	7%
	3	\$50,000 to \$74,999	14%
	4	\$75,000 to \$99,999	17%
	5	\$100,000 to \$149,999	19%
	6	\$150,000 to \$199,999	11%
	7	\$200,000 or more	6%
	98	Not sure	2%
	99	Refused	21%

Thanks so much for participating in this important survey! This survey was conducted for OCTA.

Sample Items

S1	County of residence		
	1	LA	10%
	2	Orange	17%
	3	Riverside	63%
	4	San Bernardino	8%
	5	Other	1%
S2	Survey version		
	1	Phone	37%
	2	Email	63%
S3	Frequency of 91 Express Lanes use in past 12 months		
	1	Low (fewer than 25 trips)	27%
	2	Medium (25 trips to 124 trips)	52%
	3	High (125 or more trips)	22%