

91 EXPRESS LANES 2011 CUSTOMER SATISFACTION SURVEY

REPORT PREPARED FOR THE
ORANGE COUNTY TRANSPORTATION AUTHORITY



EXECUTIVE SUMMARY



741 GARDEN VIEW COURT, SUITE 208
ENCINITAS CA 92024
760.632.9900 WWW.TN-RESEARCH.COM



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 they 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 in the full report. In brief, a total of 1,000 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.



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 mid-week (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, as well as customers' open-ended responses about ways the 91 Express Lanes road and customer service can be improved, 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 patterns 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

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.

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.