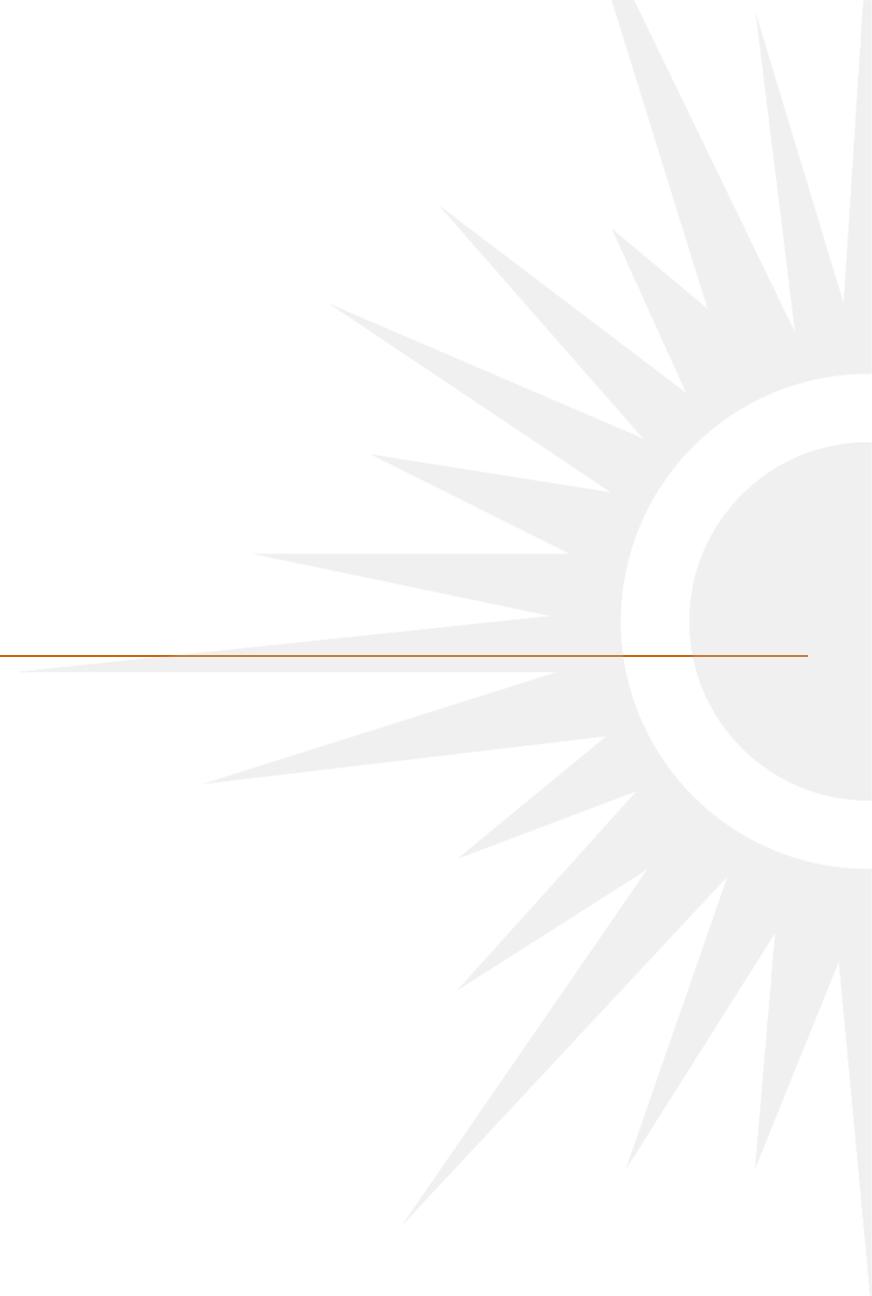


EXPRESS LANE DRIVER SURVEY | 2021

A REPORT TO CDOT HPTE



EXECUTIVE SUMMARY



Approach

In the summer of 2021, Communication Infrastructure Group (CIG), on behalf of HPTE, retained Corona Insights to survey Front Range drivers in order to understand their use, barriers, and opinions of the Express Lanes.

Surveys were conducted via a mixed-mode (phone and online) survey. In total, 604 responses were collected (444 online and 160 via phone) from Front Range drivers. Respondents had to live in the 11-county target geography, have a current driver's license, and have access to at least one vehicle for their own use to be included in the survey sample. Surveys were available to take in English or Spanish based on the respondent's preference. The resulting data were weighted on key demographic characteristics to reduce non-response bias and increase representation of drivers in the target geography.

Survey Research Objectives:

Corona worked with the client to establish a series of research goals in order to help understand current attitudes towards Express Lanes. To that end, this survey was designed with the following questions in mind:

- > What is the overall level of satisfaction with Express Lanes?
- > What is the current level of use of Express Lanes?
- > How have drivers changed their opinions about Express Lanes over the past five years?
- > What is driving support or opposition to Express Lanes?
- > What are the barriers to using an Express Lane?

01

Overall, drivers held positive opinions of the **Express Lanes**. Half of drivers said their overall opinion was a 6 or higher on a scale of 0 (*completely negative*) to 10 (*completely positive*). Drivers who had used an Express Lane in the past gave a higher average opinion (6.0) than those who had not (4.6).

02

Most drivers said their opinion of Express Lanes had either not changed or had become more positive over the past five years. While about half of drivers said their opinion had not changed, a greater share (29%) said their opinion had become more positive than those who said their opinion had become more negative (23%).

03

Drivers were more likely to say they used the Express Lane by paying a toll than carpooling. While 89% of Express Lane users said they did so by paying a toll in the past 60 days, about half (51%) said they did so by carpooling with three or more people in their car.

04

Drivers said they used Express Lanes to avoid traffic delays and make up time when running late. When users were asked their primary reason for using an Express lane, nearly half (45%) said it was to avoid traffic delays in general, and about one fifth (17%) said it was to make up time when running late. About one quarter of non-users said they would potentially use the Express Lanes to avoid traffic delays in general (26%) or to make up time when running late (25%). This is the key benefit to communicate and reinforce among current and potential users.

05

While most drivers were satisfied with various aspects of the Express Lanes, there was room to improve opinions about the Lanes' ability to reduce congestion on highways. A majority of drivers said they were at least somewhat satisfied with a series of aspects of the Express Lane experience. However, about one out of three drivers said they were dissatisfied with Express Lanes' ability to reduce congestion on highways. These drivers reported lower overall satisfaction levels. Focus on this benefit for all drivers, even non-users, to increase overall positive perceptions of Express Lanes.

06

Most drivers said they understood how to use Express Lanes, though **billing was one area of confusion**. More than half (60%) of drivers rated their understanding of how to use the Express Lane as high. When asked to identify one confusing aspect of Express Lanes, three out of ten said they were not confused by anything. The most common point of confusion was charges/billing.

07

A lack of need and cost/perceived value were the biggest barriers for Express Lane use. About one out of three non-users of Express Lanes (36%) said they simply never have needed to use one or avoid highway driving in general. Next, 17% said they did not want to pay a toll, and 13% said they were concerned with how much they would be charged. Among users, about one third (34%) said they were dissatisfied with the overall value they received vs. toll cost from using an Express Lane.

08

Younger drivers are a key segment. Younger drivers (those under age 55) were more likely to use the Express Lanes as well as more likely to use them frequently. Avoiding delays and saving time are key benefits they seek by using them.

09

Drivers wanted to see more law enforcement on Express Lanes. Nearly three out of four drivers agreed that photo enforcement to catch people weaving in and out of Express Lanes increases safety for all drivers, and most agreed that law enforcement should patrol the Express Lanes more regularly.

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