



COLORADO
**Transportation
Investment Office**

December Communications Update

Express Lanes Survey: Key Findings and Next Steps

2025 Express Lane Survey

Key Findings and Year-Over-Year Results

Overview

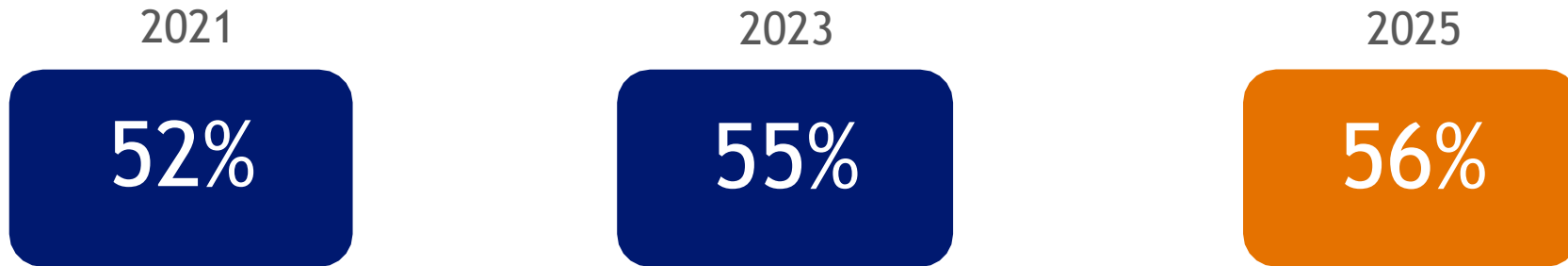
CTIO retained Corona Insights to survey Front Range Drivers in fall 2025 for the third iteration of the Express Lanes survey.

The goals of this research were to:

- Understand current attitudes toward Express Lanes.
- Discover what barriers to use exist for drivers.
- Compare year-over-year perceptions between 2021, 2023 and 2025.
- Gauge awareness and support of safety enforcement efforts.

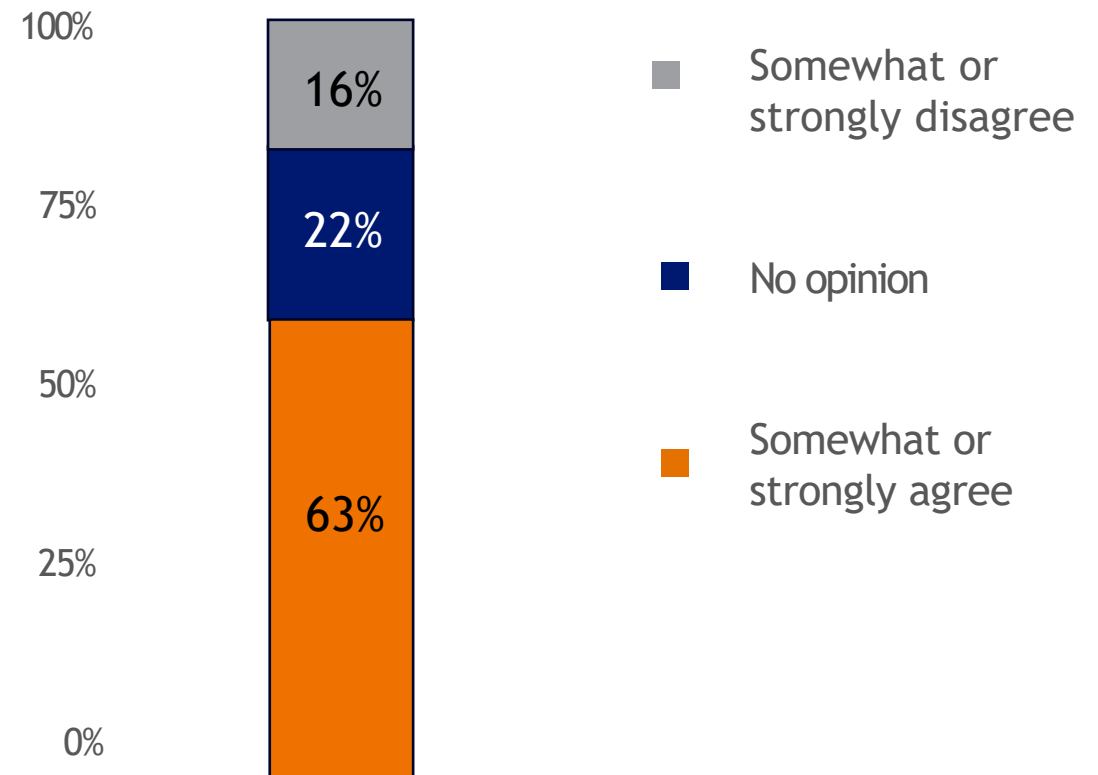
Positive Opinions of Express Lanes

Drivers who rated their overall experience with Express Lanes as positive:

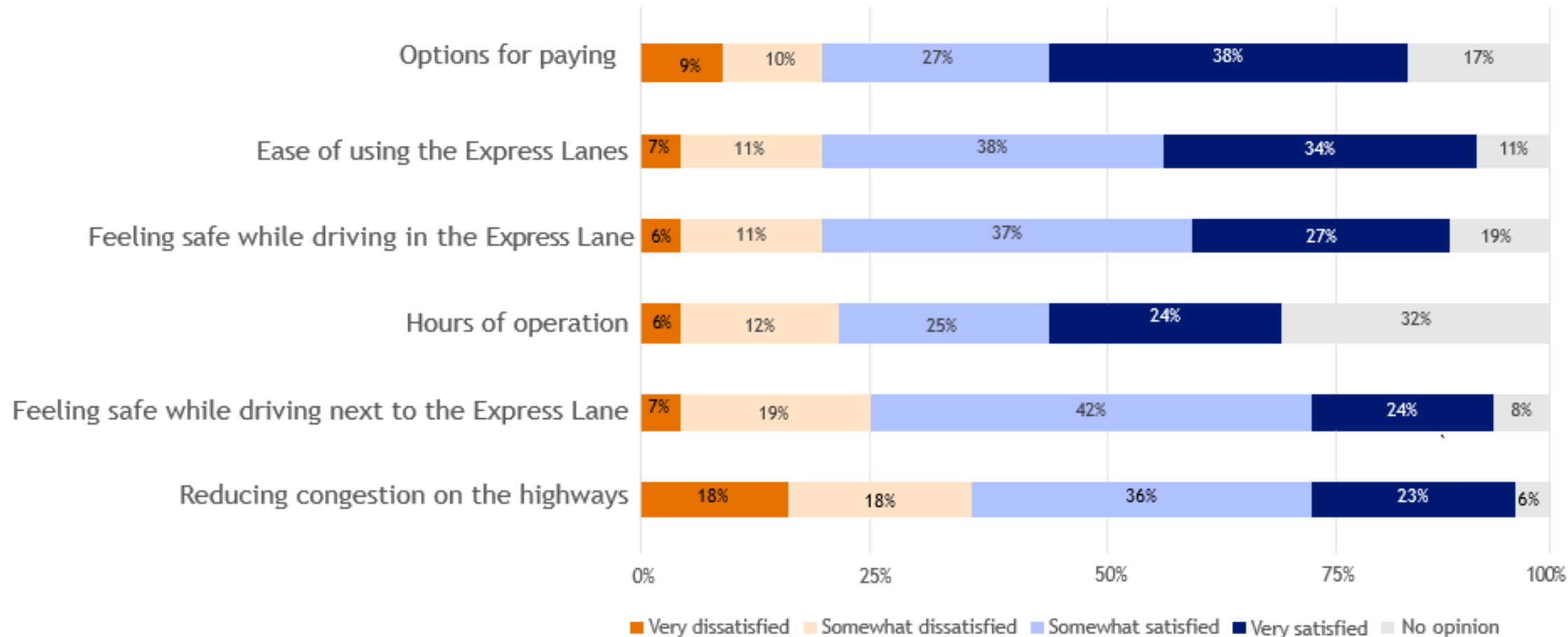


Drivers in 2025 largely agree that STEP has made the Express Lanes safer.

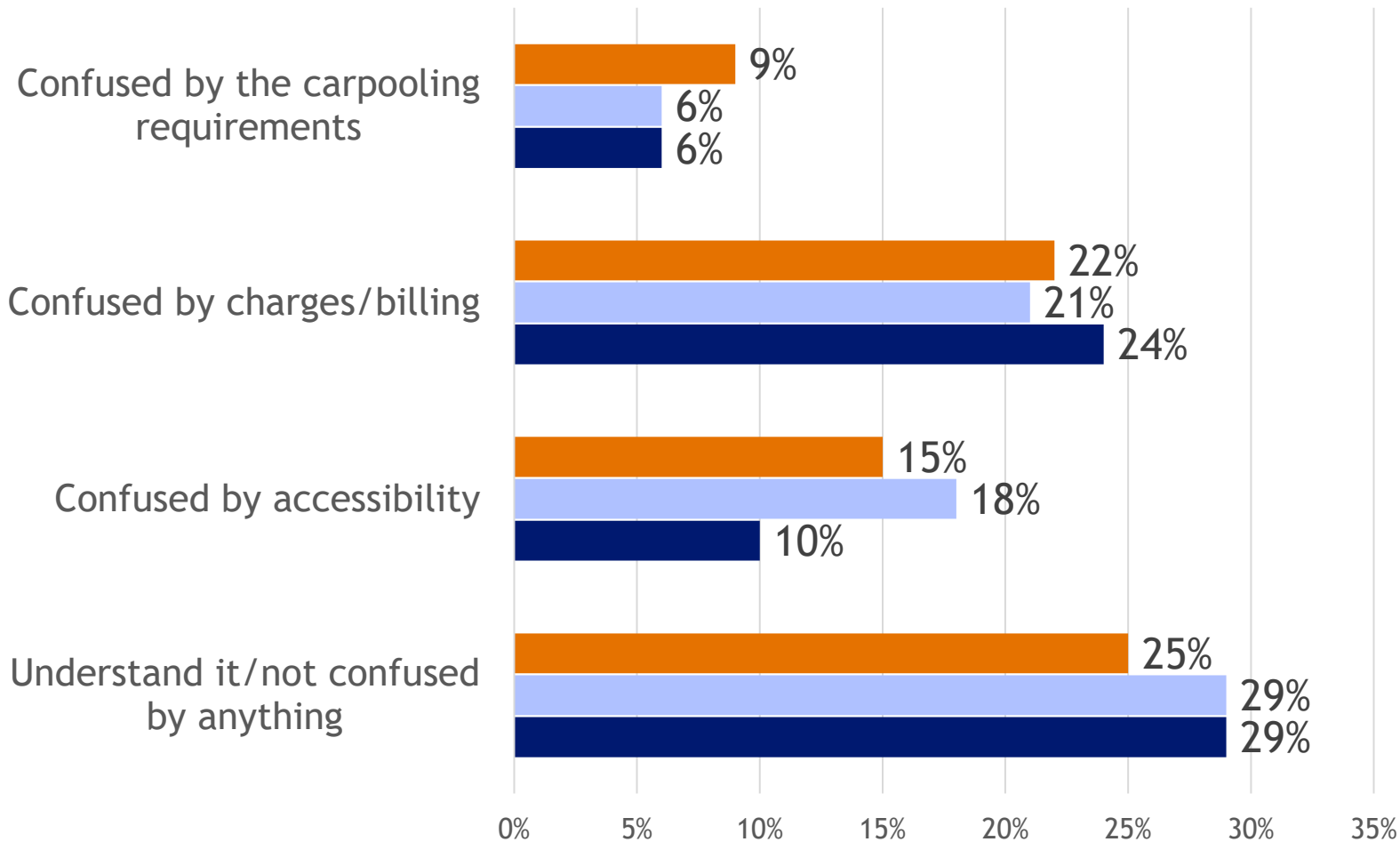
Nearly 2/3 of surveyed drivers agree that the Express Lanes Safety and Toll Enforcement Program has made the Express Lanes safer.



Driver Satisfaction with Experience of Using Express Lanes



Confusion with Aspects of Express Lanes



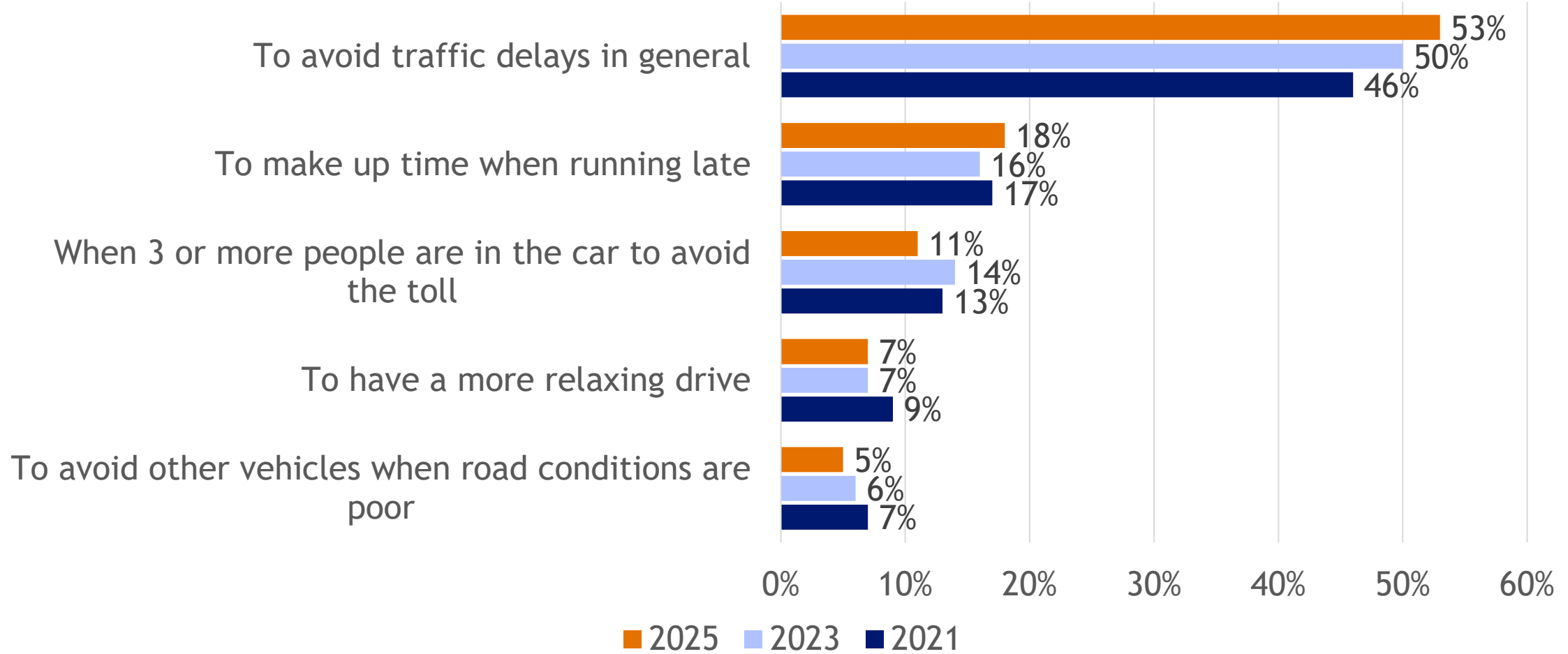
Other points of confusion:

- Carpooling requirements
- Signage
- Pass/renewal of pass
- General confusion/not familiar with the lanes

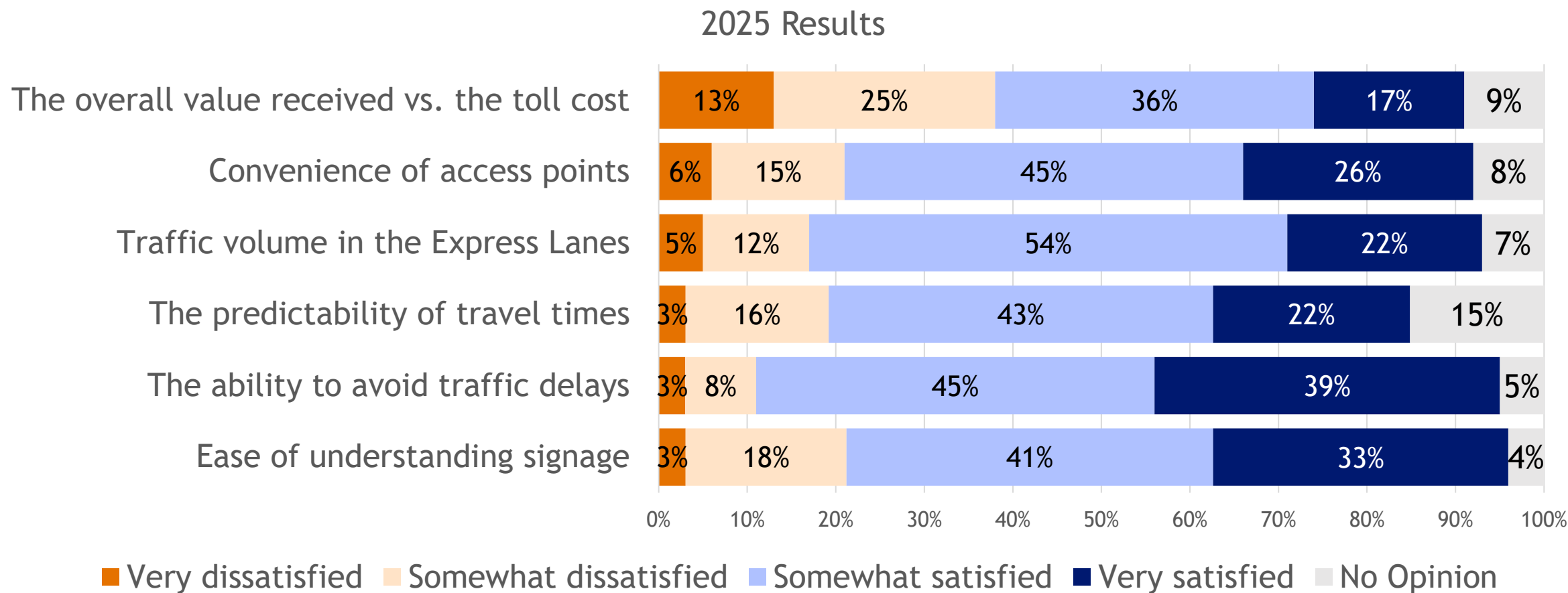
■ 2025 ■ 2023 ■ 2021

Express Lane Usage

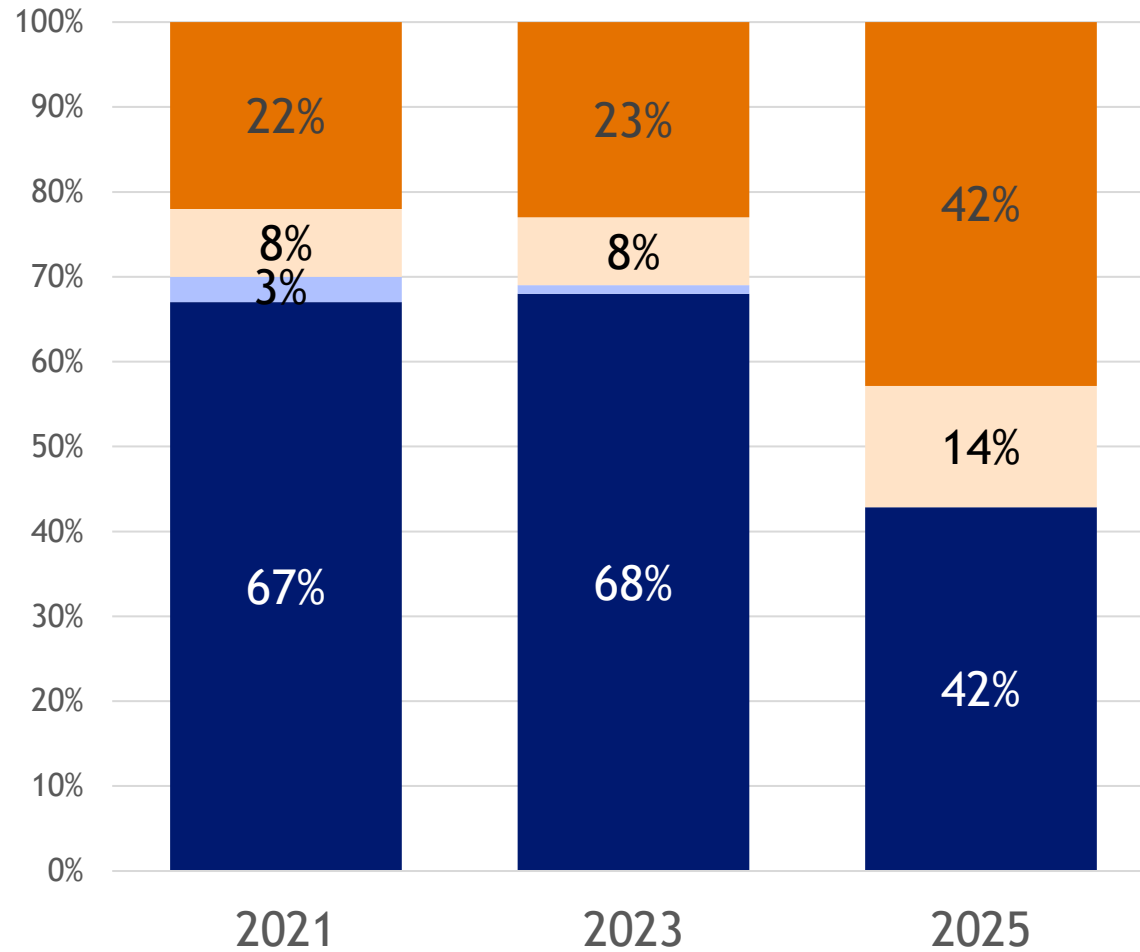
Primary Reason for Using Express Lanes



Driver Satisfaction with Aspects of Express Lanes



Transponder Ownership

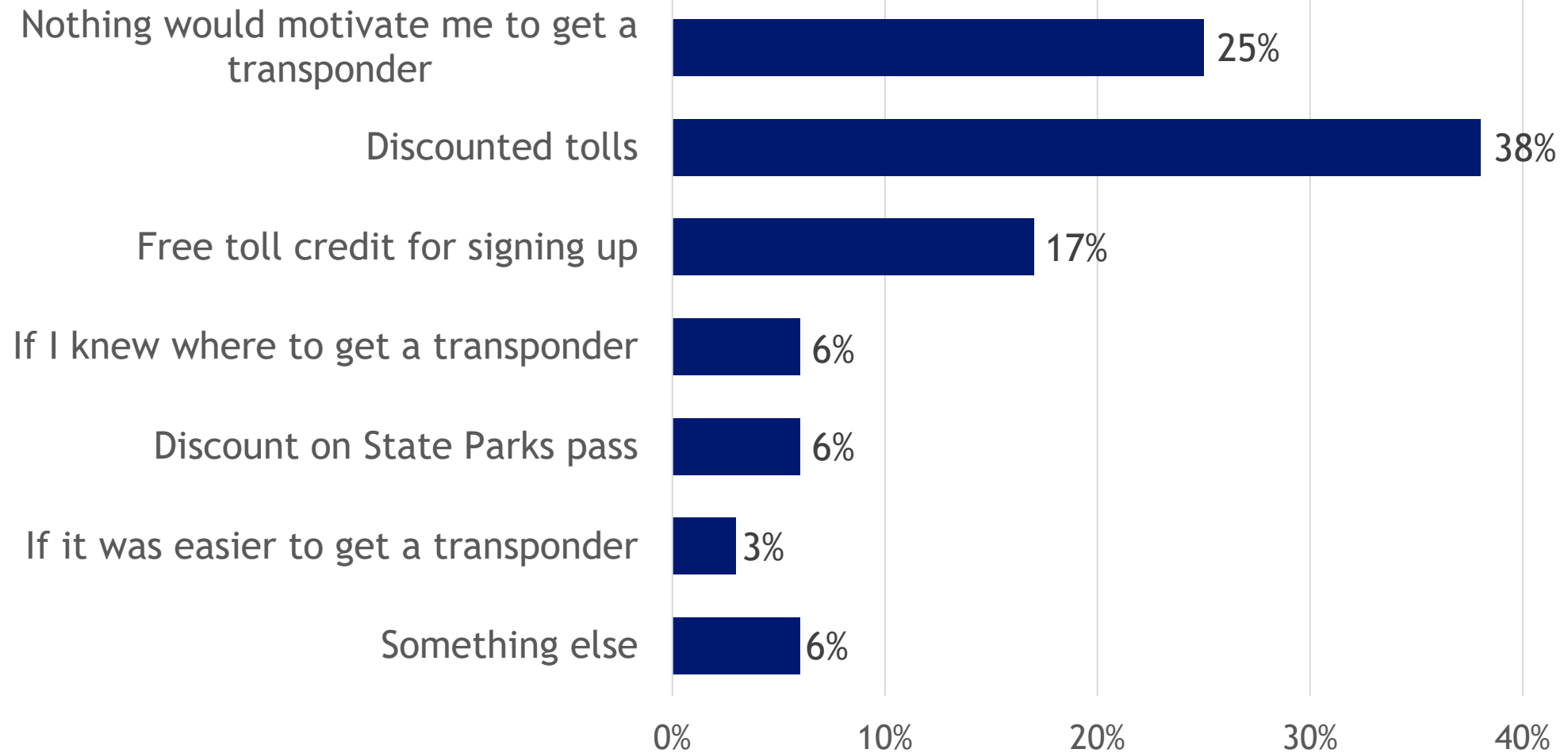


- No transponder
- Yes - unsure of type
- Yes - switchable
- Yes - sticker

Awareness that transponders save users ~40% on tolls

| <u>2021</u> | <u>2023</u> | <u>2025</u> |
|-------------|-------------|-------------|
| 52% | 58% | 55% |

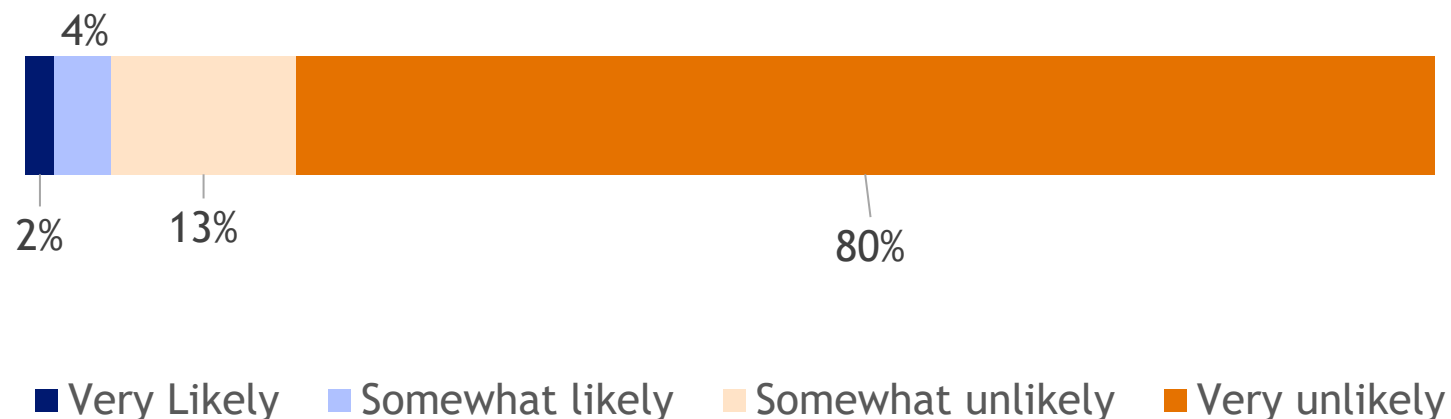
Potential Motivators for Getting a Transponder



Barriers to Express Lane Use

Most non-users were unlikely to utilize an Express Lane in the next month.

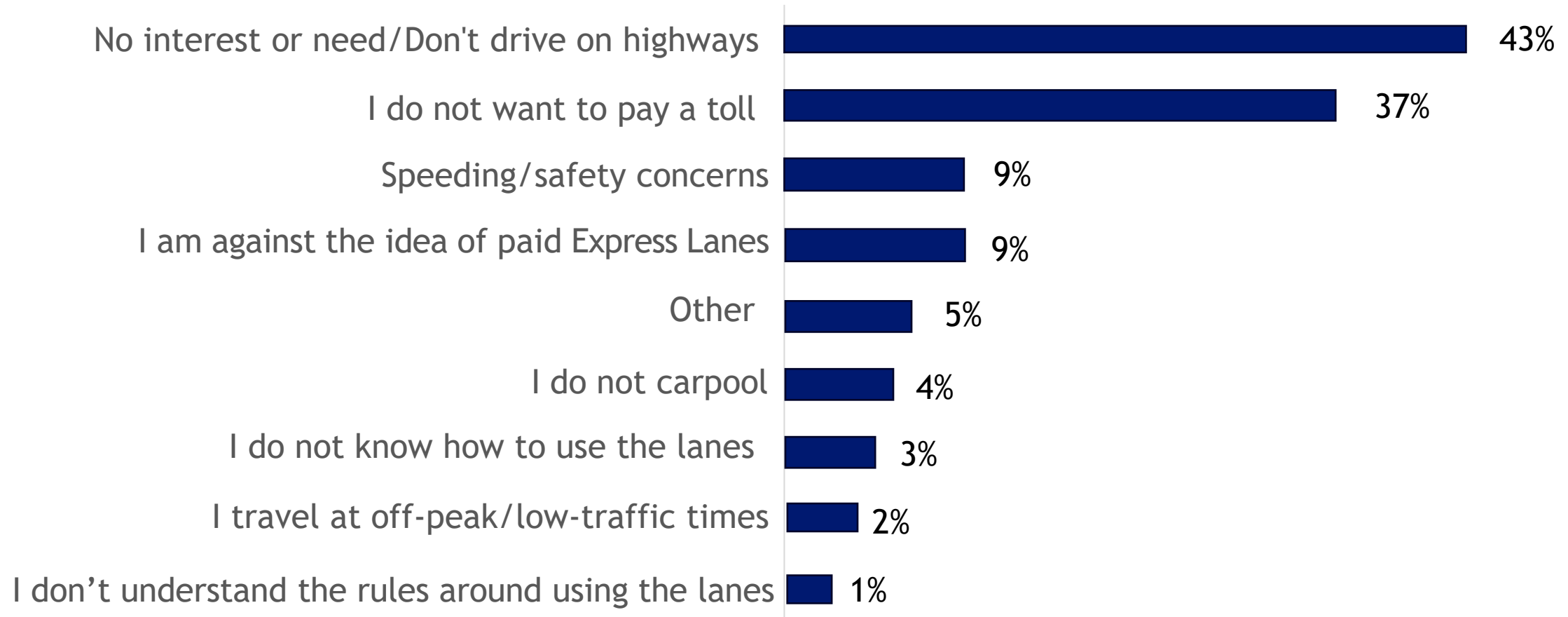
Likelihood to Use Express Lanes in the Next Month
(non-users)



Reasons for trying an Express Lane:

- To avoid traffic delays
- When 3 or more people are in the car to avoid the toll
- To avoid other vehicles when conditions are poor
- To make up time when running late
- To have a more relaxing drive

Reasons Drivers Have Never Used the Express Lanes



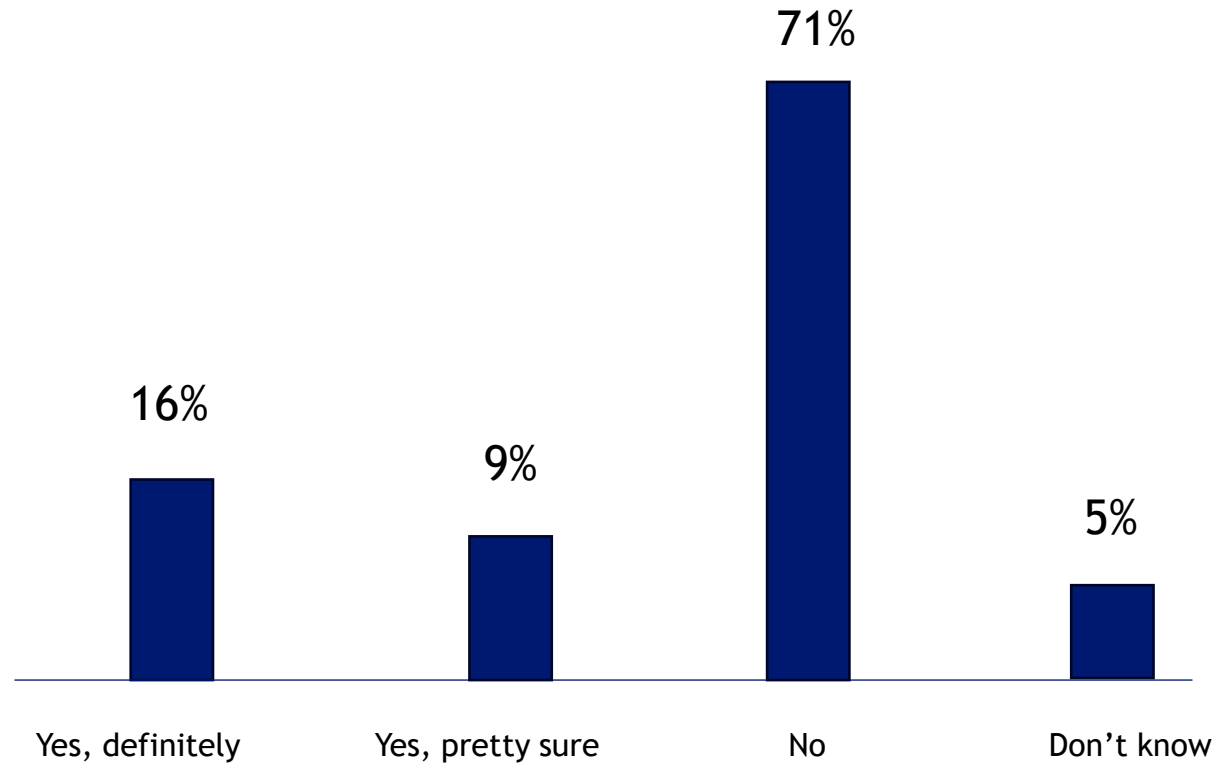
Enforcement of Express Lane Rules

Drivers in 2025 largely agree that STEP increases safety.

| Percentage of drivers who agreed that... | 2025 |
|---|------|
| Drivers will receive a fine if they cross the solid line of the Express Lanes | 74% |
| Photo enforcement to catch drivers who cross the solid line of Express Lanes increases safety for all drivers | 71% |

A quarter of drivers have received a fine or warning or know someone who has.

Have you or someone you know ever received a fine or warning for an Express Lane violation?



Next Steps

Future Action Items

- Continue ongoing education on the Safety and Toll Enforcement Program to increase the number of drivers aware of the program.
- Focus education regarding tolling on what a transponder is and how it works, in alignment with the back-office transition.
- Continue the implementation of the Safety and Toll Enforcement program to increase safety in the Express Lanes.

Questions?