




*Hampton Roads
Electronic Tolling / E-ZPass Study*

April 2, 2008





Objectives and Methodology

Study Objectives

- This research is designed to support an upcoming marketing campaign for E-ZPass
- It is designed to:
 - Provide information and related insights to help support VDOT's upcoming electronic tolling / E-ZPass public education and information campaign in Hampton Roads
 - Establish performance benchmark measures
 - Provide information and insights on the extent to which residents of Hampton Roads understand and know about “electronic tolling”

Study Methodology

- A telephone survey was designed and conducted in order to meet the objectives of this research.
- Interviews were conducted Jan. 16-30, 2008.
- The sample for this research consists of three key audiences:

Current E-ZPass Users n = 200	Adult drivers in Hampton Roads, ages 21-59, who have and use E-ZPass on tolled facilities in Hampton Roads
Prospective E-ZPass Users n = 200	Adult drivers in Hampton Roads, ages 21-59, who use any of the tolled facilities in Hampton Roads at least one day a week and could use E-ZPass, but do not
Residents n = 200	Adult residents of Hampton Roads, ages 21-59, who do not use any of the tolled facilities in the Hampton Roads' area



Detailed Findings

Outline of Report

I. E-ZPass Awareness and Familiarity

II. E-ZPass Usage

III. Prospective Users

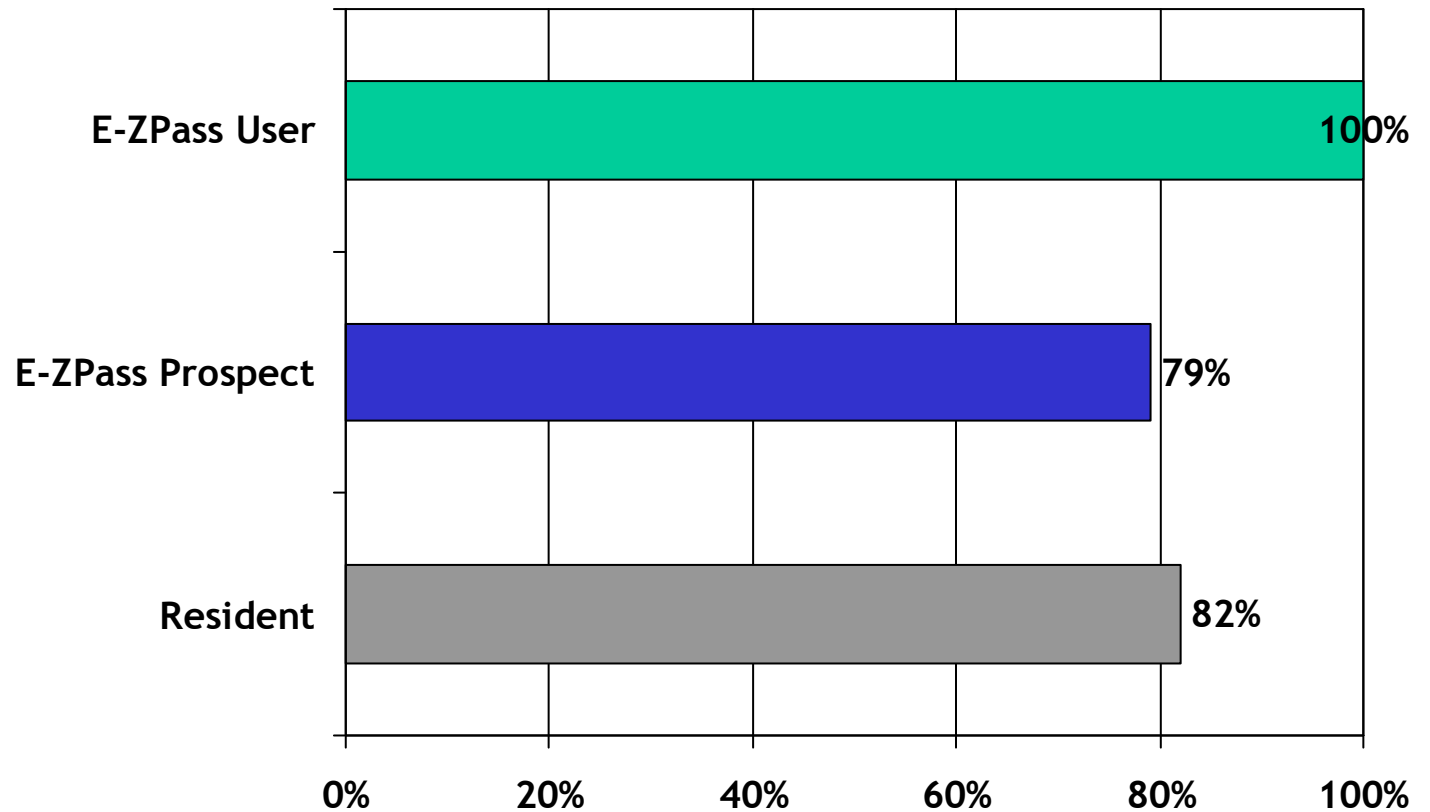
IV. E-ZPass Perceptions

V. Communications

VI. Electronic Tolling: The Future

VII. HOV Lanes Use and HOT Lanes Perceptions

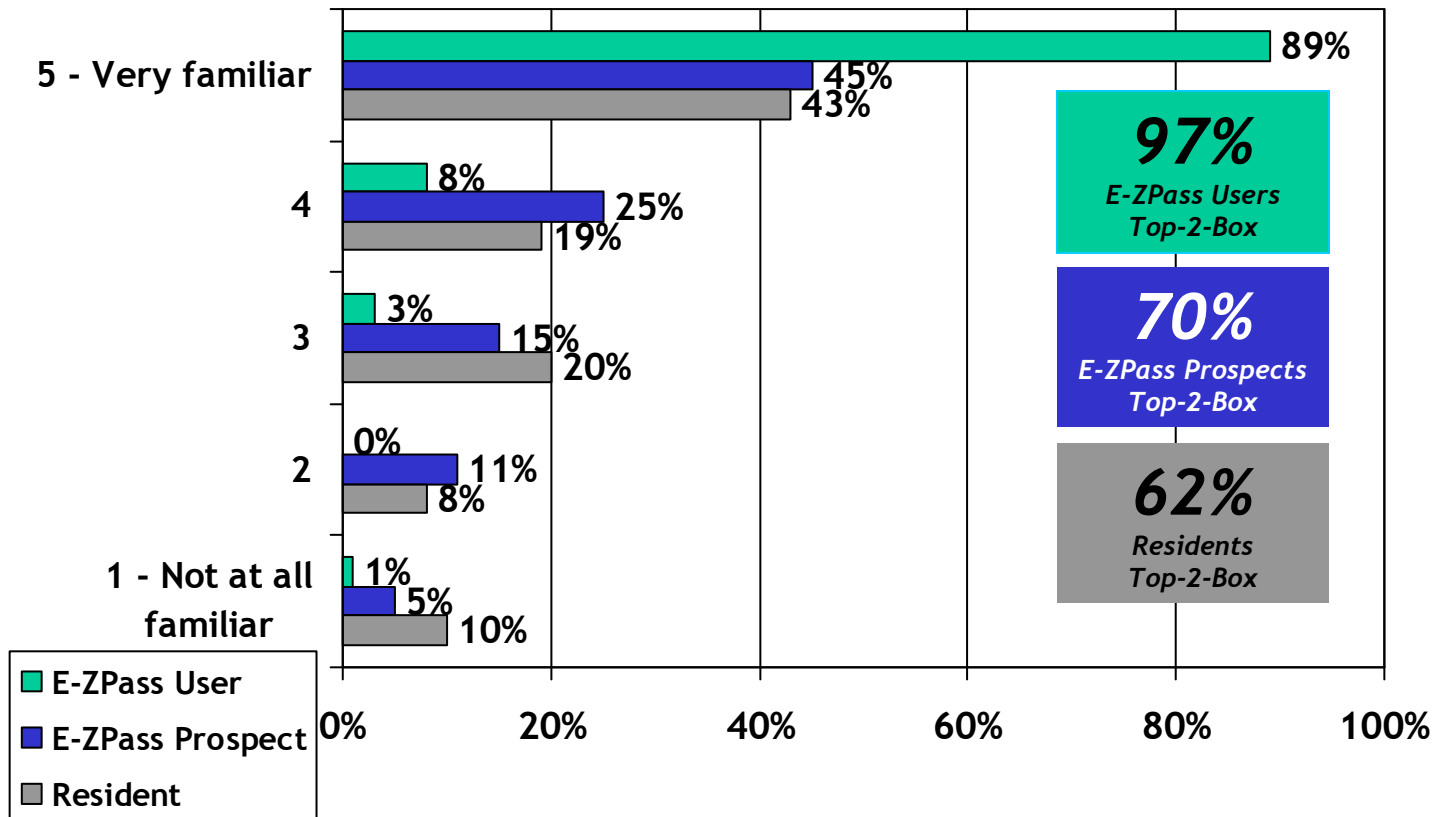
Awareness of E-ZPass Is High - Even among Those Who Do Not Use E-ZPass



Q9. Are you aware of the service called E-ZPass, sometimes referred to as SmartTag?

Top-2-box score refers to the total proportion answering "4" or "5" on a 5-point scale.

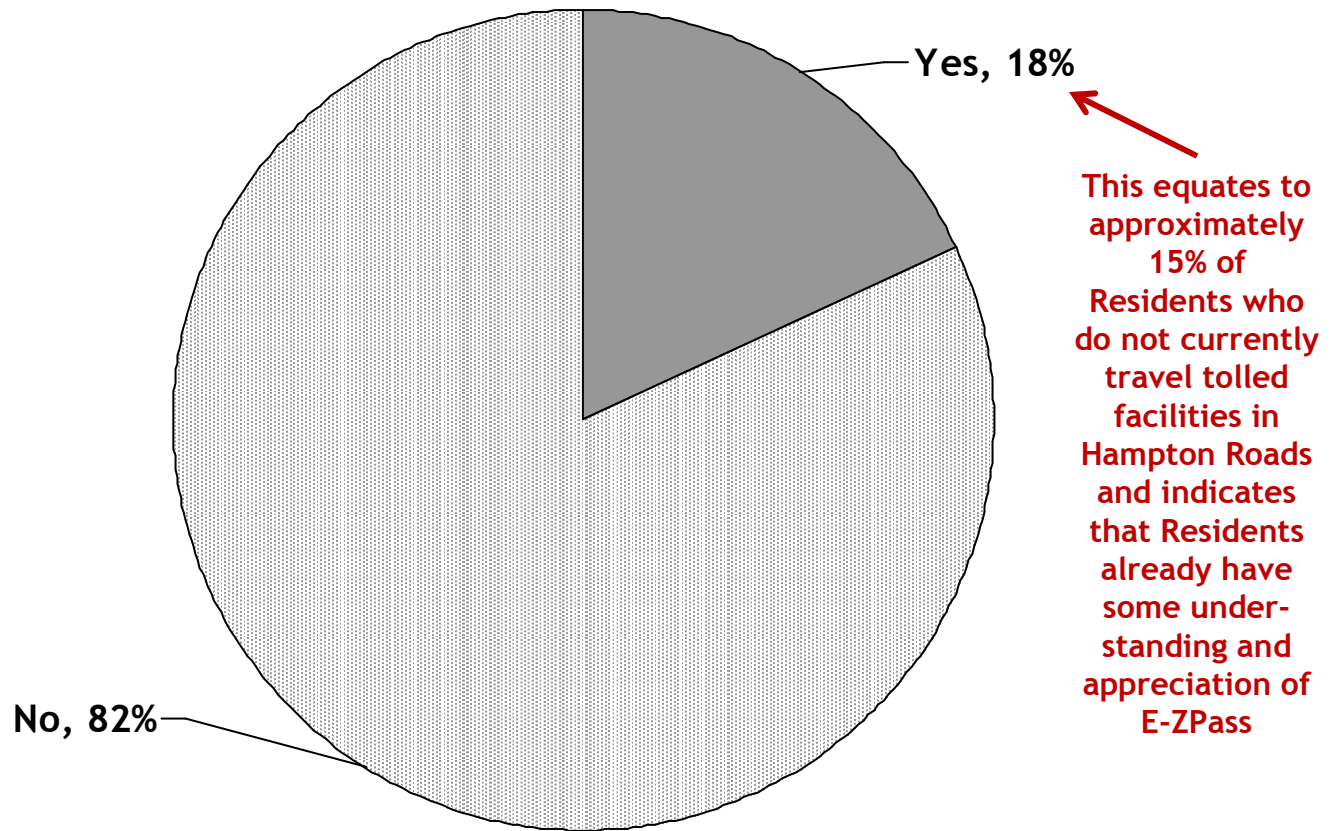
Not Just E-ZPass Users Are Familiar with It; About Two-thirds of Prospects and Residents Who Are Aware of E-ZPass Also Say They Are Familiar with E-ZPass



E-ZPass User
n = 200
E-ZPass Prospect
n = 158
Resident
n = 175

Q10. Overall, how familiar are you with E-ZPass, sometimes referred to as SmartTag? ASKED ONLY OF THOSE AWARE

18% of Residents Who Are Aware of E-ZPass Have an E-ZPass Even Though They Do Not Travel the Tolled Facilities in Hampton Roads



By definition, 100% of Users and 0% of Prospects have an account.

Resident
n = 175

Q11. Do you currently have an E-ZPass account? ASKED ONLY OF THOSE AWARE

Outline of Report

I. E-ZPass Awareness and Familiarity

II. E-ZPass Usage

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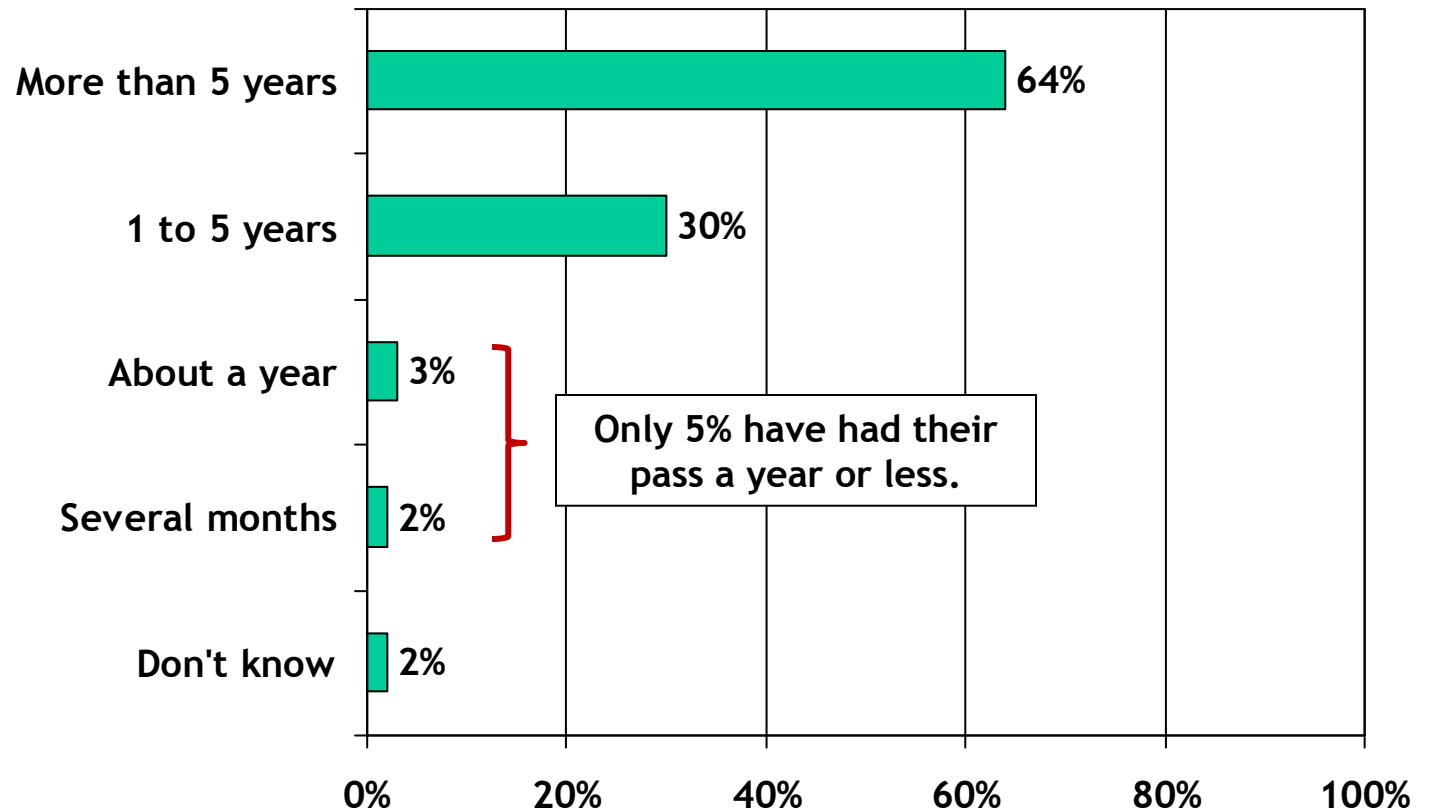
IV. E-ZPass Perceptions

V. Communications

VI. Electronic Tolling: The Future

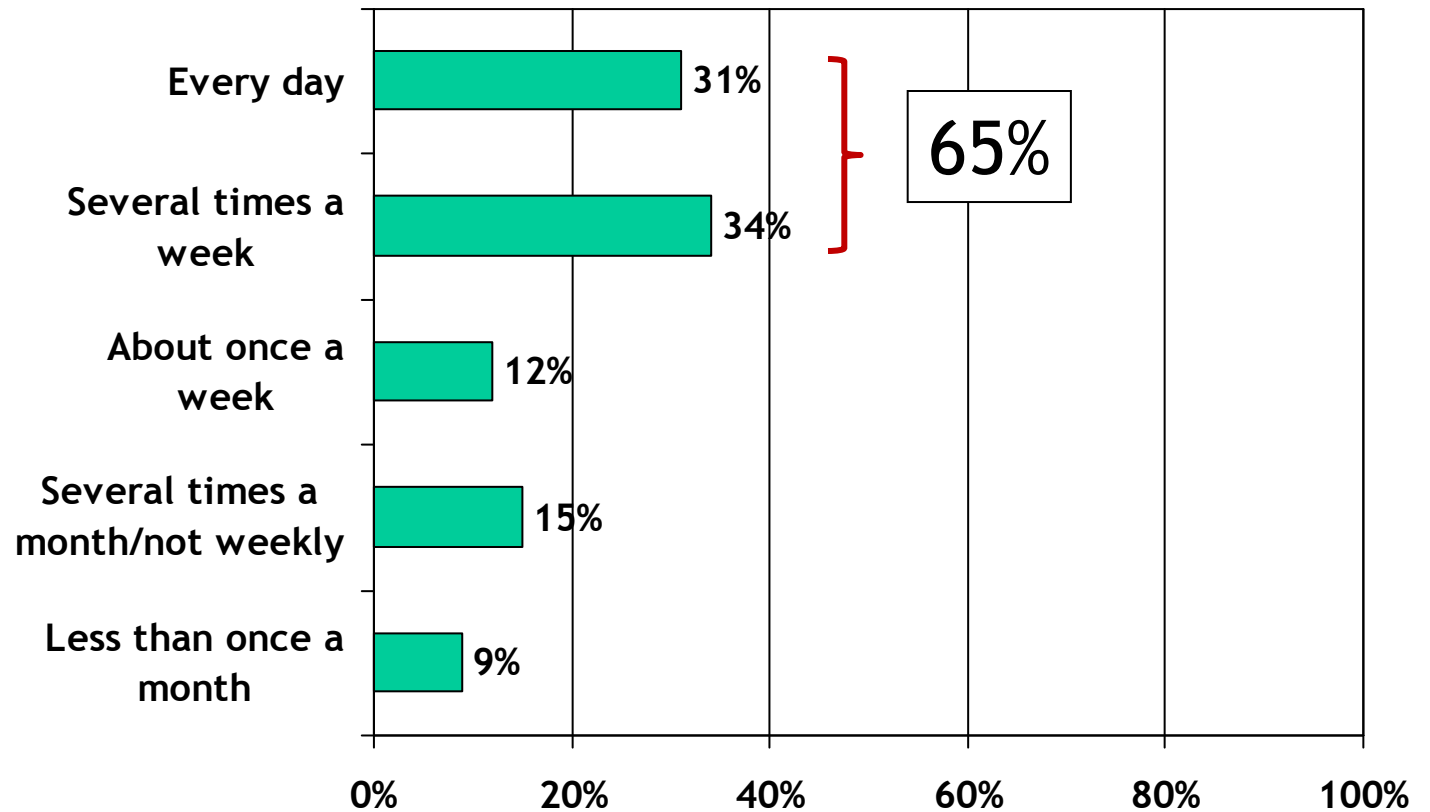
VII. HOV Lanes Use and HOT Lanes Perceptions

The Majority of E-ZPass Users Have Had Their Pass for More Than a Year



Q13. How long have you had your E-ZPass? ASKED ONLY OF E-ZPASS USERS

Almost Two-thirds Use Their Pass At Least Several Times A Week - Nearly a Third Use It Every Day



Q14. How often do you use E-ZPass? ASKED ONLY OF E-ZPASS USERS

“It Is Cheaper” Is the Most Frequently Mentioned Reason for Using an E-ZPass

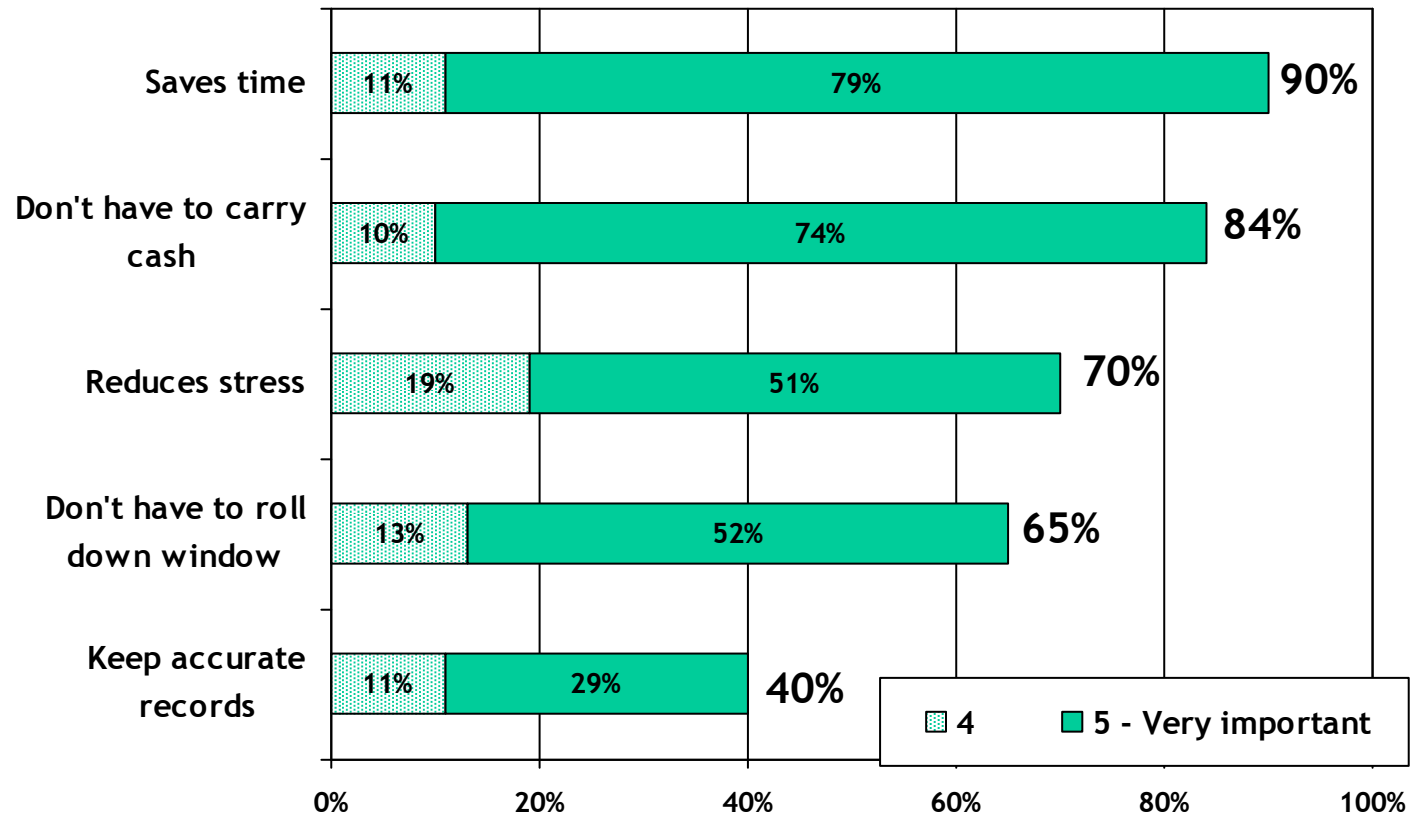
Some respondents gave more than one answer. Thus, proportions total to more than 100%.

It is cheaper	44%
Convenience	29%
Don't have to stop at toll booth	21%
Saves time / faster	14%
Use it for work	9%
Don't have to carry cash	7%
Other	10%

E-ZPass
Prospect
n = 200

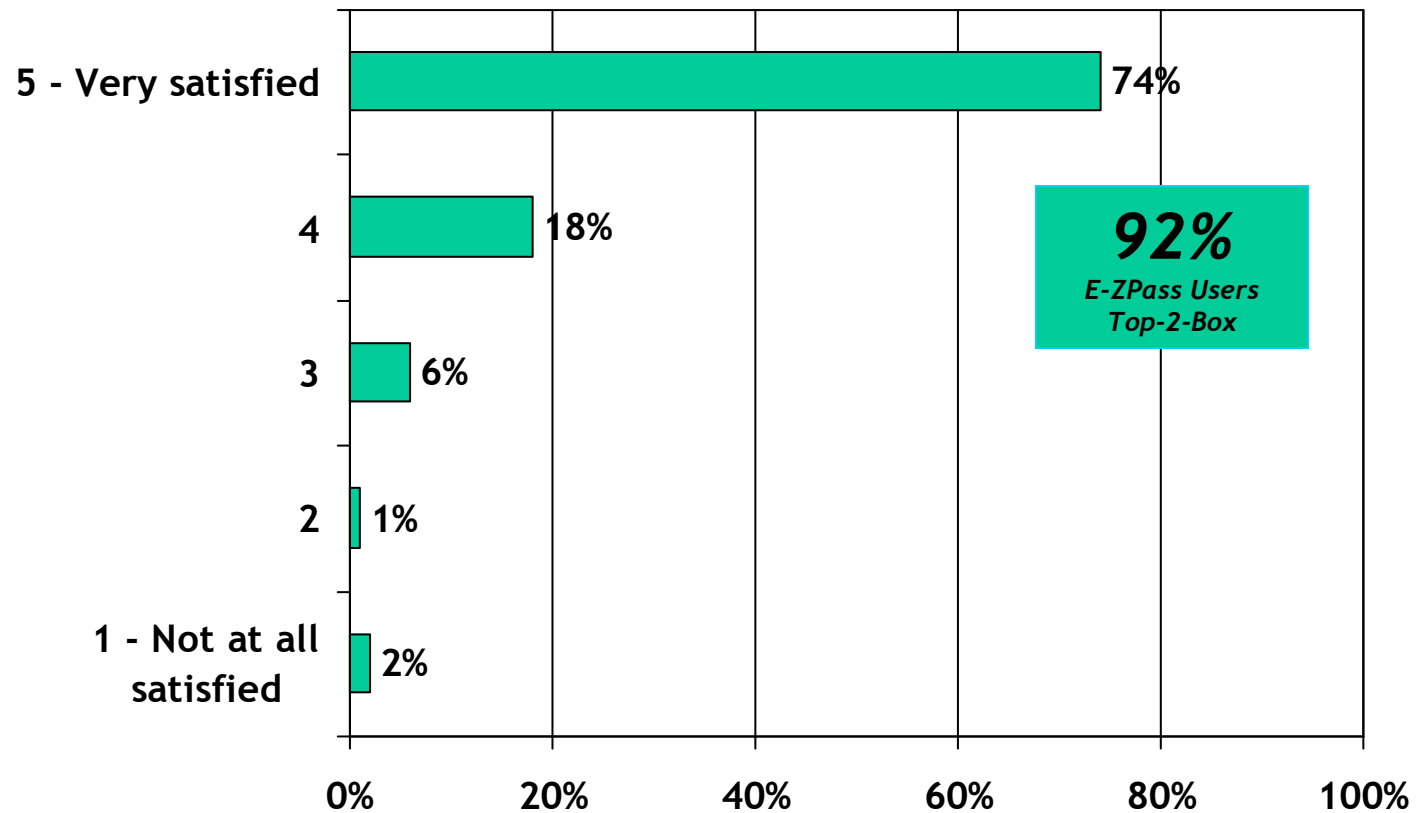
Q15. What is the most important reason that you use E-ZPass? ASKED ONLY OF E-ZPASS USERS

Saving Time Is The Most Important Reason to Have an E-ZPass - But, Not Having to Carry Cash Is Also an Important Reason to Have an E-ZPass



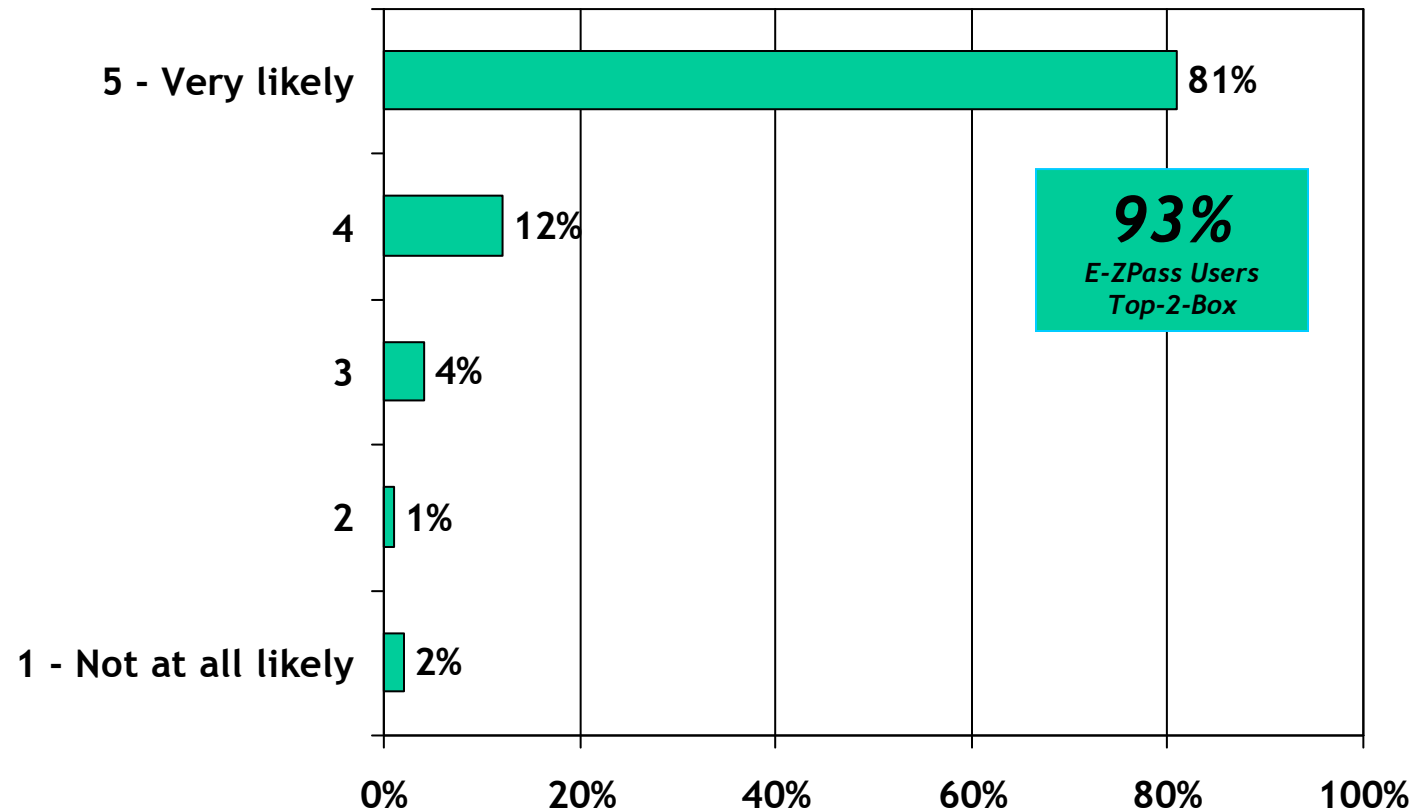
Q16a-e. I would like to know how important each of these statements is as a reason that you use E-ZPass. ASKED ONLY OF E-ZPASS USERS

The Majority of Users Are Satisfied with E-ZPass



Q17. Overall, how satisfied are you with E-ZPass? ASKED ONLY OF E-ZPASS USERS

Most Users Would Recommend E-ZPass



Q18. How likely would you be to recommend E-ZPass to your friends or family members who drive on a roadway or bridge or through a tunnel that has a toll? ASKED ONLY OF E-ZPASS USERS

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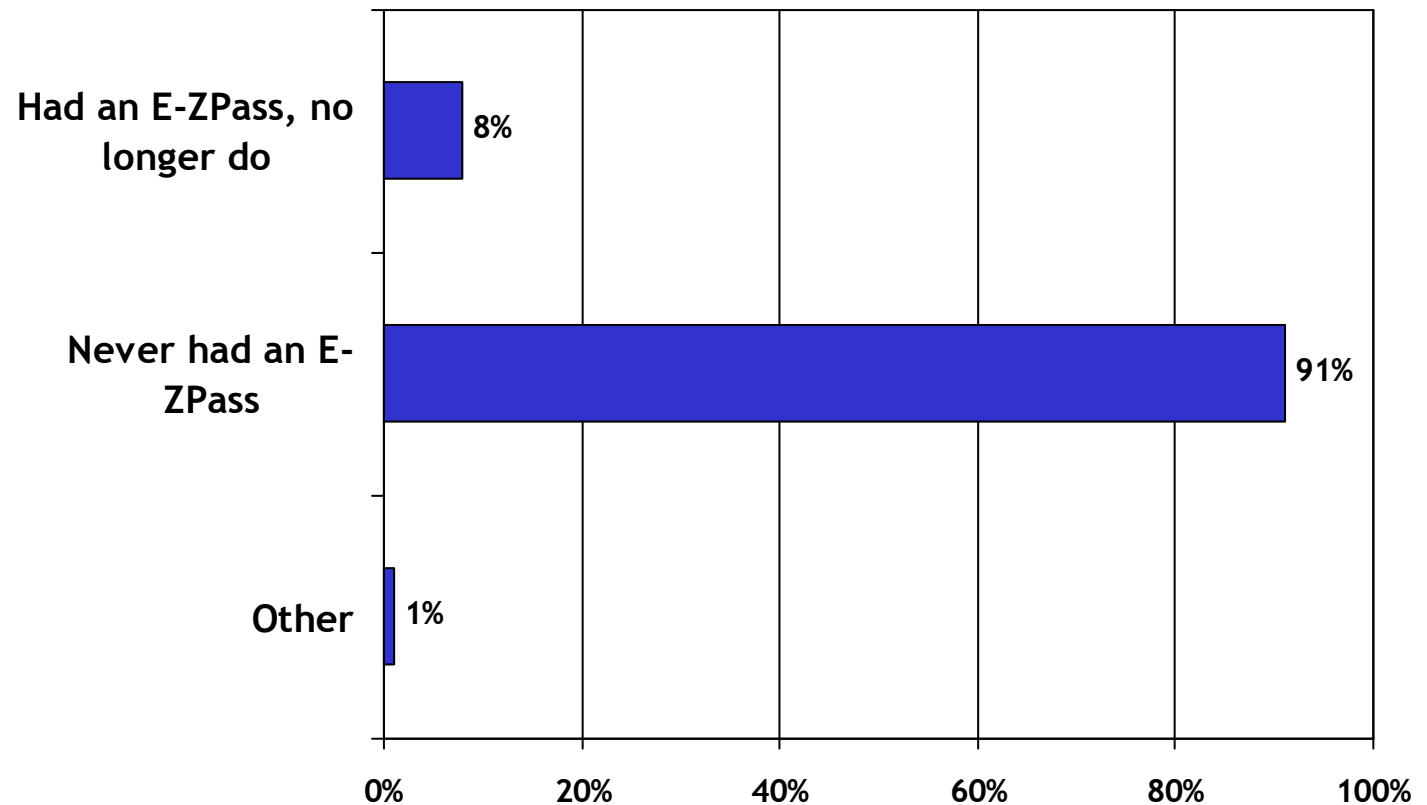
IV. E-ZPass Perceptions

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VII. HOV Lanes Use and HOT Lanes Perceptions

Of the Prospects, Less Than 1 in 10 Had an E-ZPass Account in the Past



Q19. Which of the following phrases best describes you? ASKED ONLY OF THOSE AWARE

E-ZPass
Prospect
n = 158

The Reason Cited by Prospects Most Often for Not Having an E-ZPass: *Don't Feel They Drive Far on Tolled Facilities*

Lack of use does not seem to reflect negative perceptions of E-ZPass.

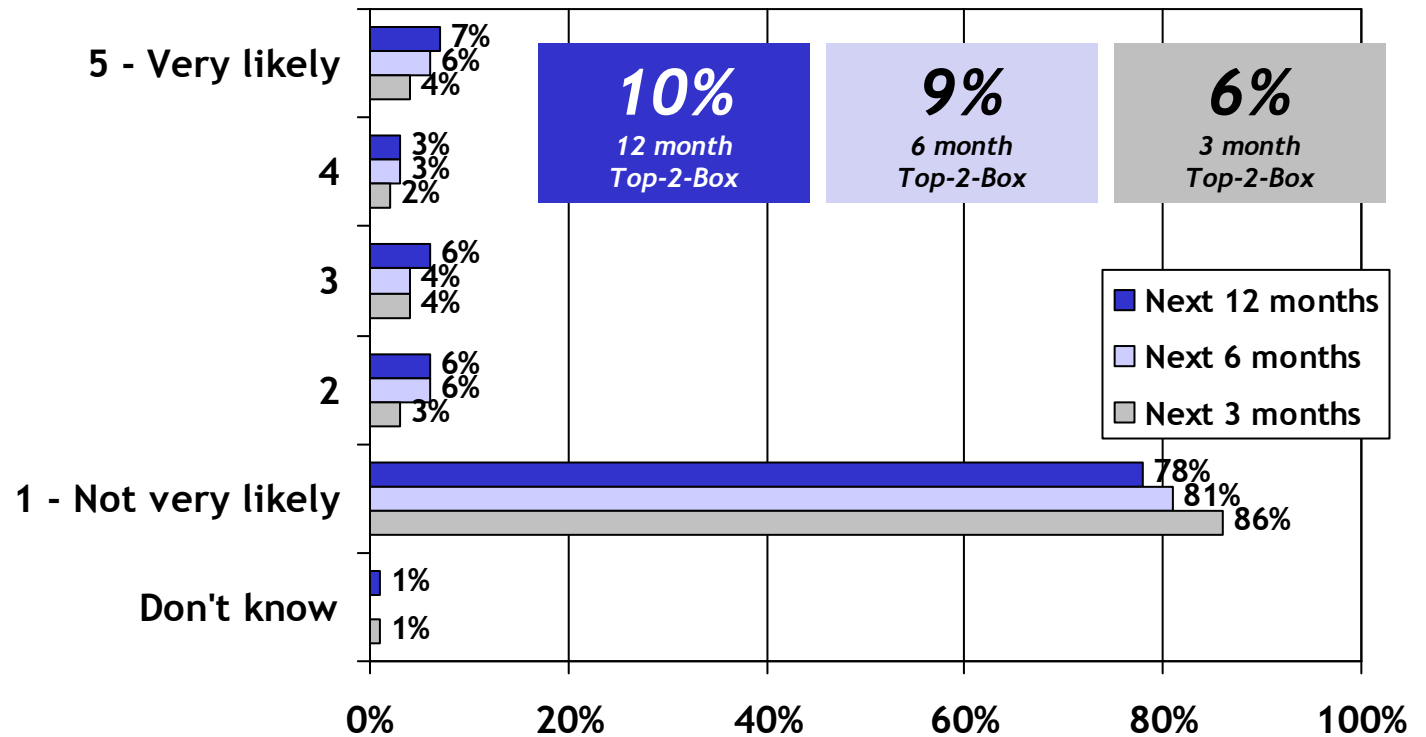
Don't drive that far	57%
Don't need it/have use for it	14%
Haven't gotten around to it	5%
Not convenient	5%
Not familiar	5%
Does not save any/enough time	3%
Don't like paying in advance/giving out credit card	3%
Too expensive/can't afford it	3%
Other family member has one/I get one at work	2%
Cannot expense it without receipt	1%
Don't trust it	1%
Don't like it	1%
Other	7%
Don't know	3%

E-ZPass
Prospect
n = 153

19

Q20. Why do you not use E-ZPass? ASKED ONLY OF THOSE AWARE

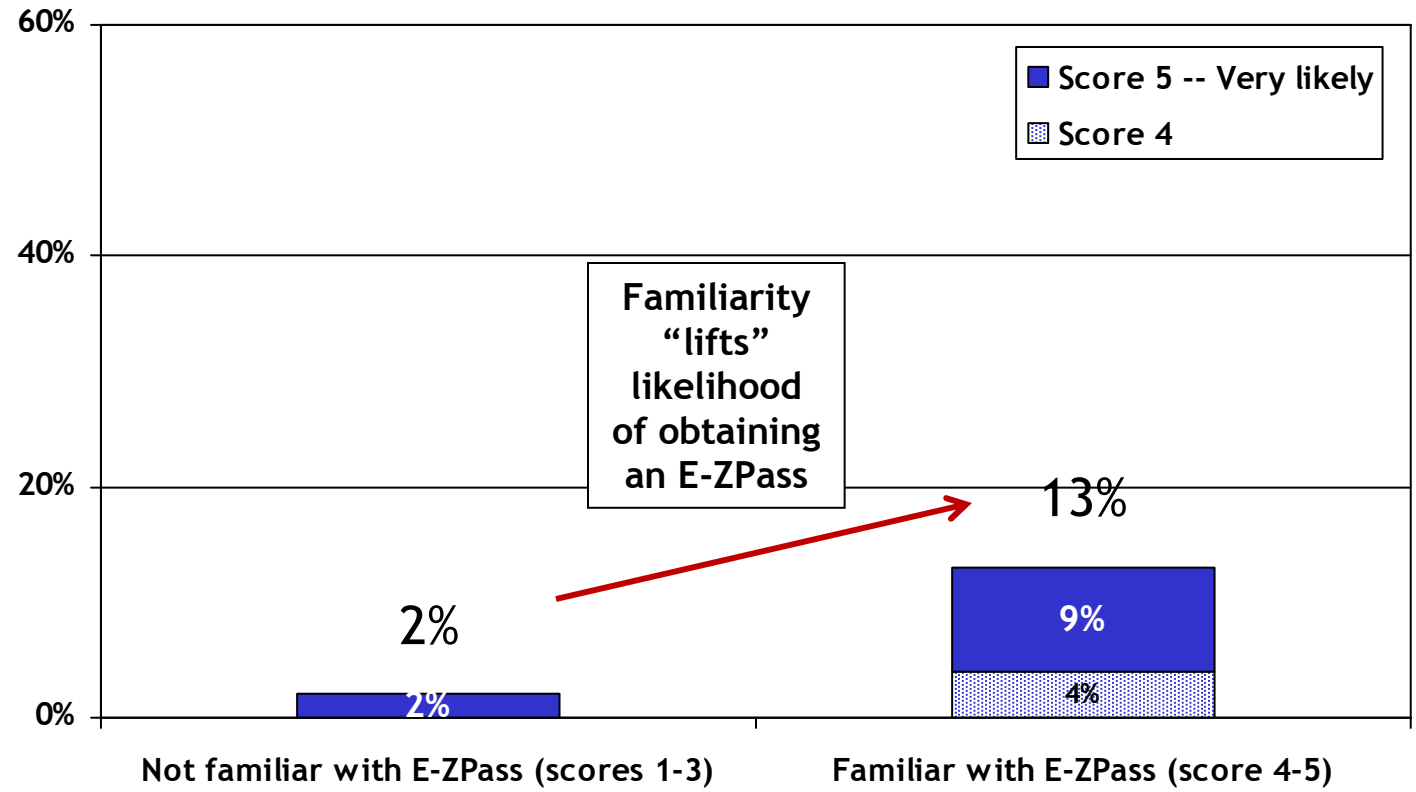
10% of Prospects Are Likely To Obtain An E-ZPass In the Next Year; But, Likelihood Diminishes As the Time Period Decreases



E-ZPass
Prospect
n = 158

Q21, 23, 24. How likely is it that you will obtain an E-ZPass within the next [12, 6, 3] months? ASKED ONLY OF THOSE AWARE

Prospects Familiar with E-ZPass Are More Likely to Say they Will Obtain a Pass in the Next Year



Q21. How likely is it that you will obtain an E-ZPass within the next 12 months? ASKED ONLY OF THOSE AWARE

Prospects Not Planning to Obtain an E-ZPass Most Often Believe They Have No Need for One

Reasons for not likely to obtain an E-ZPass tend not to be “negative” views of E-ZPass.

Have no need for it	40%
Wouldn't use it enough	32%
Don't travel much	8%
Not familiar with E-ZPass	5%
Obtaining E-ZPass is not convenient	1%
Prefer to pay cash	1%
Use company E-ZPass if I need one	1%
Safety/trust issues	1%
Other	12%
Don't know	1%

Q22. Why is that (you will not obtain an E-ZPass)? ASKED ONLY OF THOSE WHO SAID THEY WOULD NOT BE LIKELY TO OBTAIN E-ZPASS IN NEXT 12 MONTHS

22

E-ZPass
Prospect
n = 158

“Online” Is the Single Most Popular Channel to Obtain an E-ZPass Among Prospects

Online	27%
At the Coleman Bridge	12%
DMV	6%
VDOT	4%
Specific facilities (other than Coleman Bridge)	4%
Grocery store/store (nonspecific)	2%
Farm Fresh	2%
Post Office	2%
Wal-Mart	1%
Gas station	1%
Mail	1%
City Hall	1%
Other	14%
Not getting one	12%
Don't know	15%

Q22. If you were to get an E-ZPass, where would you prefer to get one? ASKED ONLY OF THOSE WHO SAID THEY WOULD BE LIKELY TO OBTAIN E-ZPASS IN NEXT 12 MONTHS

E-ZPass
Prospect
n = 113

Outline of Report

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II. E-ZPass Usage

III. Prospective Users

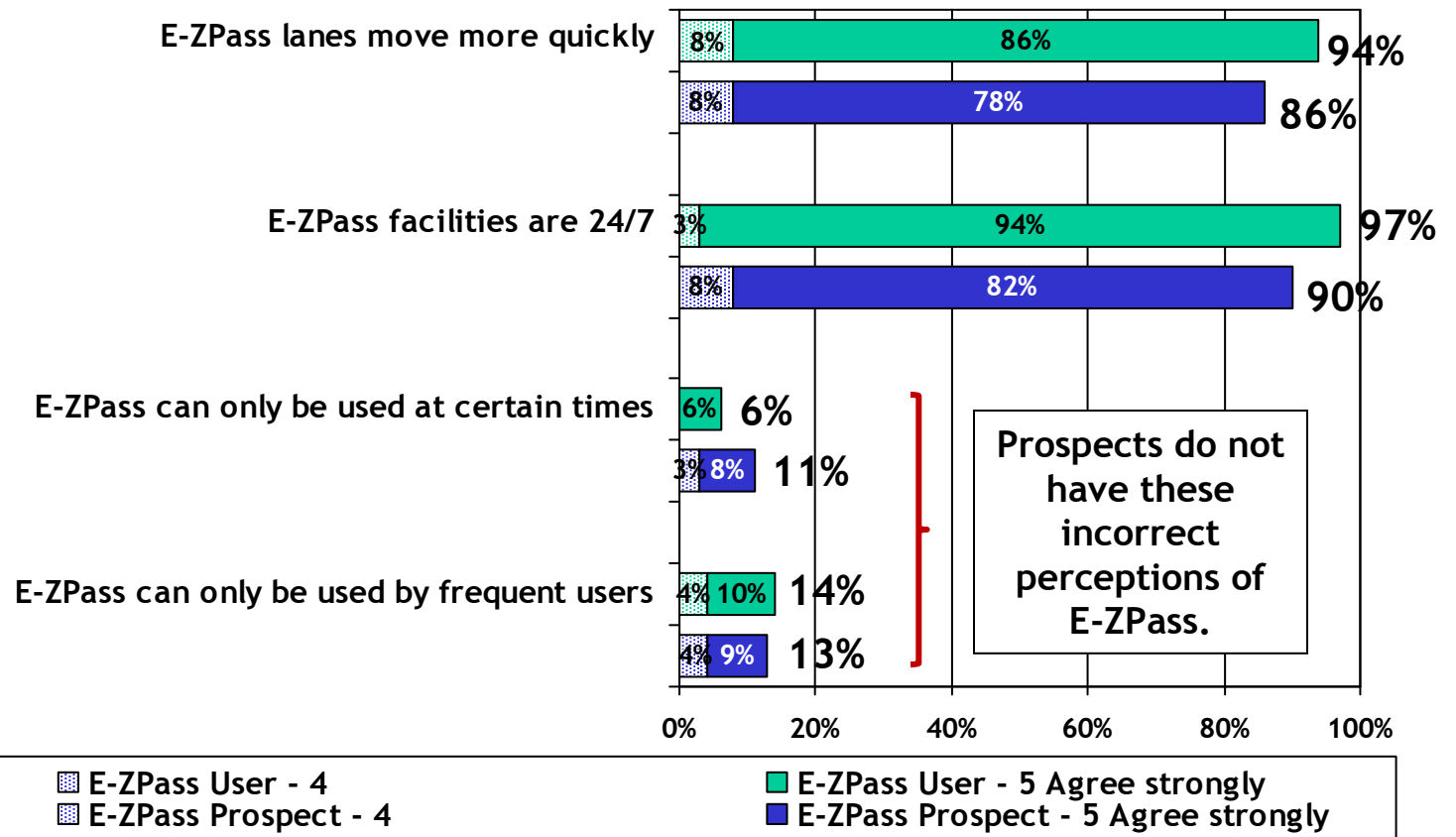
IV. E-ZPass Perceptions

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Prospects Are Less Likely than Users to Believe that the E-ZPass Lanes Move More Quickly or That the Facilities are 24/7; But, Most Prospects Believe the E-ZPass Lanes Move More Quickly and that E-ZPass Is In Effect 24/7



E-ZPass User
 n = 200
E-ZPass Prospect
 n = 158

Q26a-h. I would like to know the extent to which you agree or disagree with each statement. ASKED ONLY OF THOSE AWARE

Prospects and Users Have Different Views on the Costs Associated with E-ZPass; E-ZPass Users Are More Likely to Think It Is Cheaper with E-ZPass

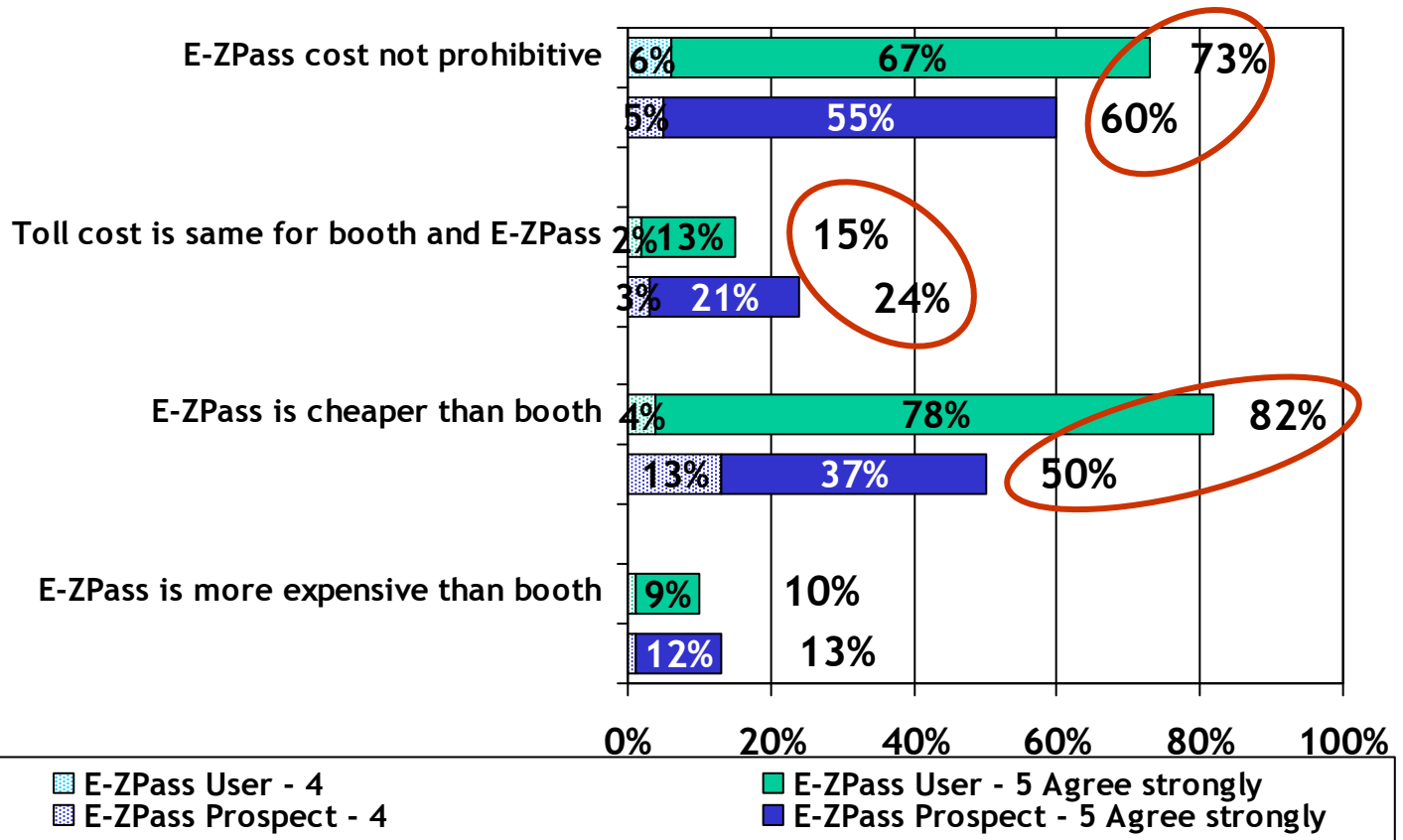
Average Incomes

E-ZPass User -
\$74K

E-ZPass Prospect -
\$67K

Resident -
\$70K

E-ZPass User
n = 200
E-ZPass
Prospect
n = 158



Q26a-h. I would like to know the extent to which you agree or disagree with each statement. ASKED ONLY OF THOSE AWARE

Outline of Report

I. E-ZPass Awareness and Familiarity

II. E-ZPass Usage

III. Prospective Users

IV. E-ZPass Perceptions

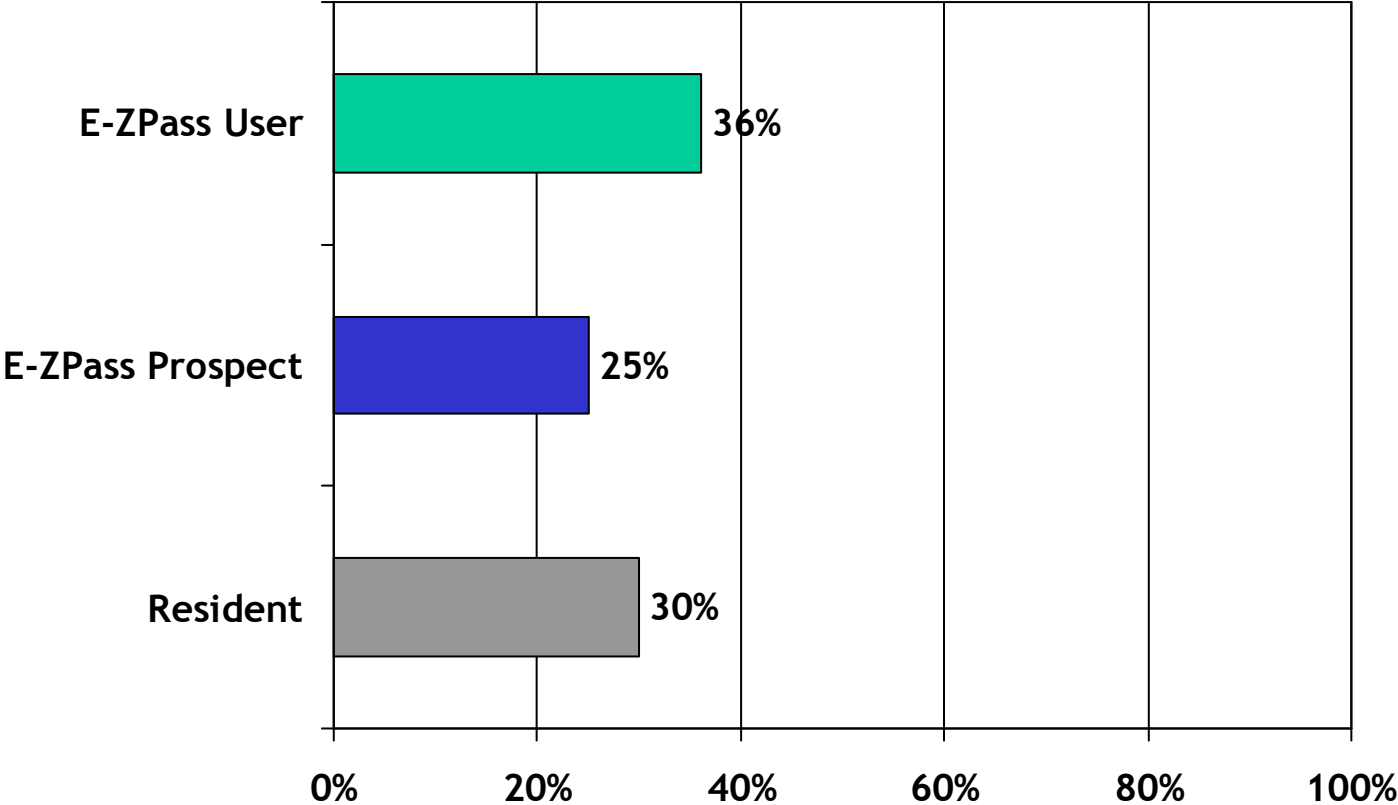
V. Communications

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E-ZPass Users, Prospects and Residents Are about Equally Likely to Have Heard or Seen any Communication or Promotion about E-ZPass in the Past Year

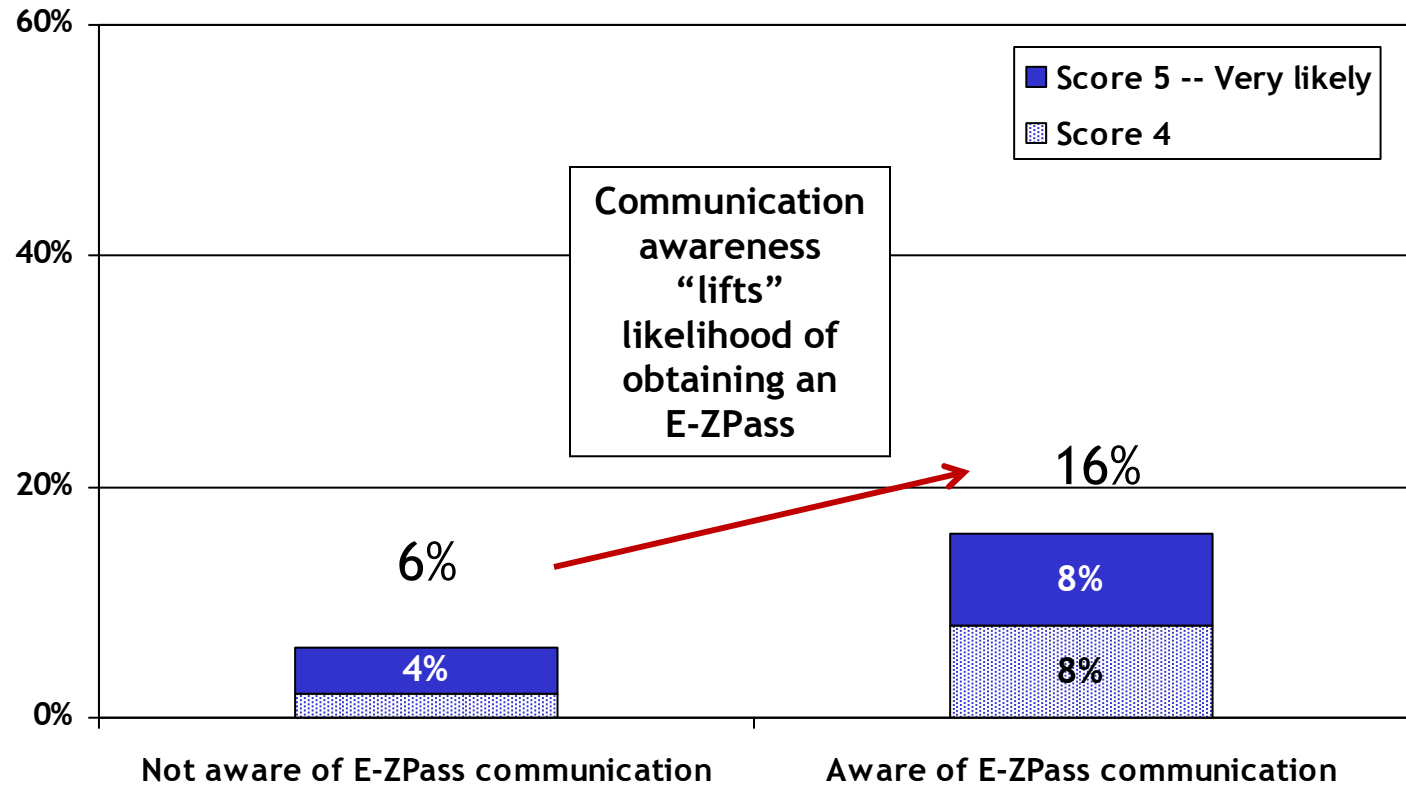
Residents who are aware of E-ZPass communication/promotion are more likely to have an E-ZPass than Residents who have not seen or read anything.



Q32. Have you heard or seen any communication or promotion about E-ZPass in the past year?

Prospects Aware of E-ZPass Communication Are More Likely to Say They Will Obtain a Pass in the Next Six Months

This relationship does not hold for likelihood of obtaining in next year or next 3 months.



Q21. How likely is it that you will obtain an E-ZPass within the next 6 months? ASKED ONLY OF THOSE AWARE

Outline of Report

I. E-ZPass Awareness and Familiarity

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III. Prospective Users

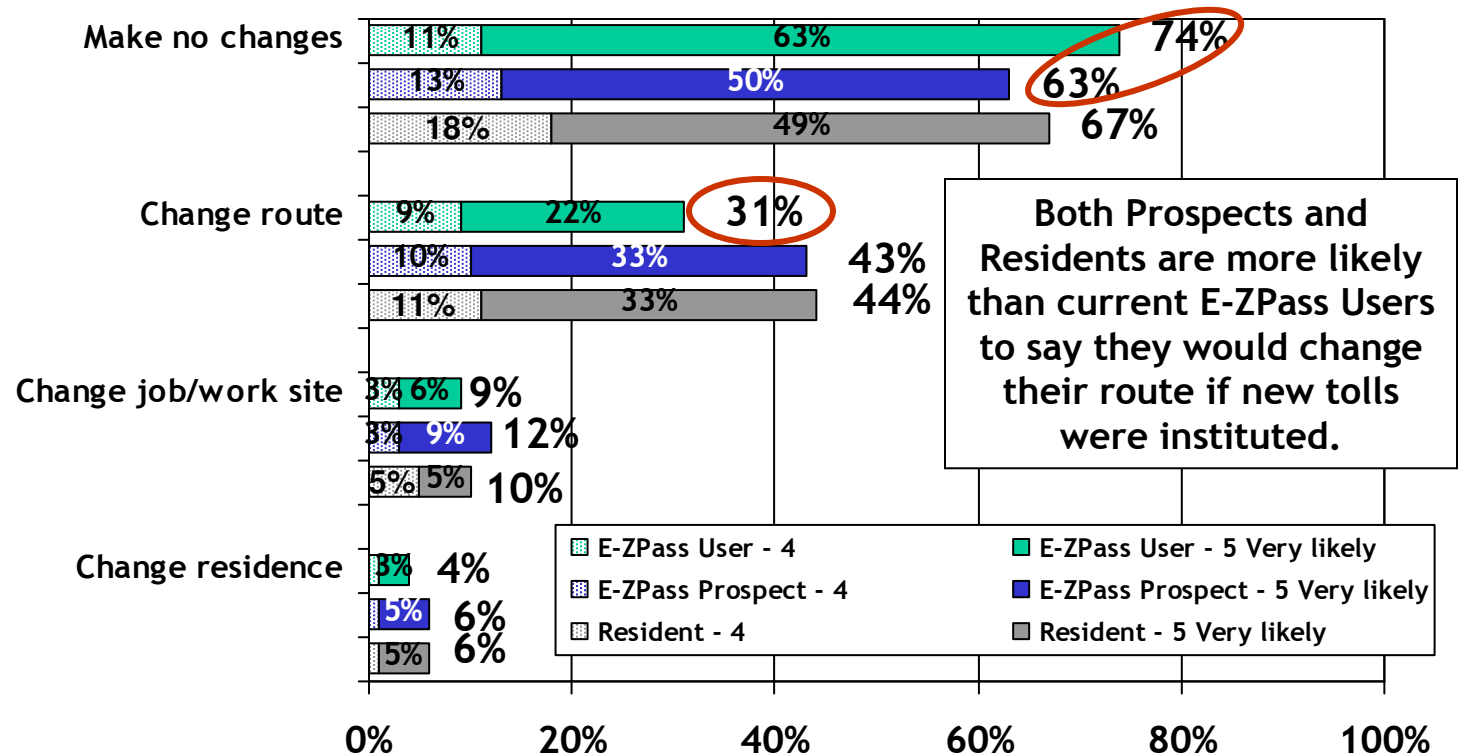
IV. E-ZPass Perceptions

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All Three Groups Are Most Likely to Say They Would Make No Changes To Their Commute if New Tolls Were Instituted; This Is Especially True for E-ZPass Users



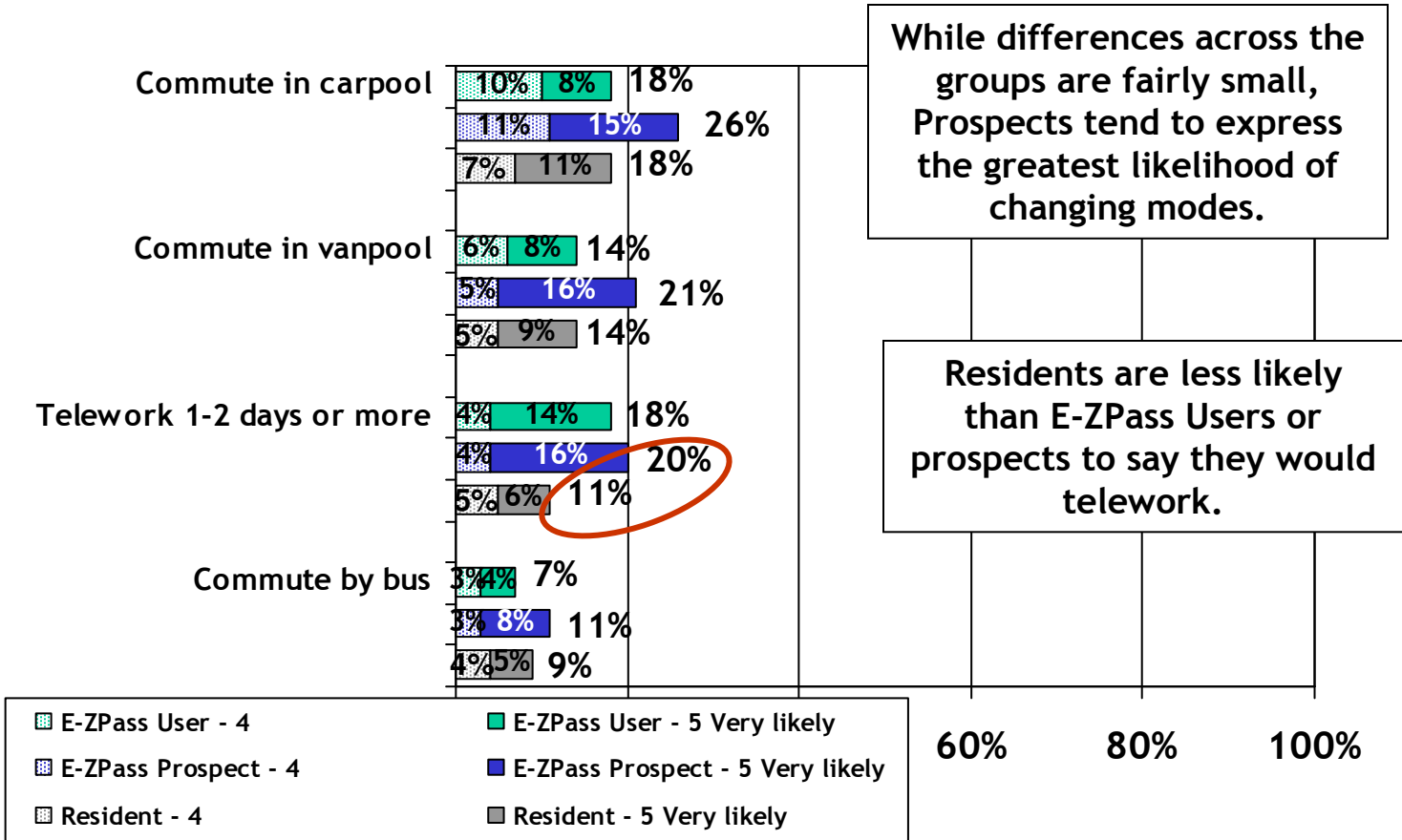
E-ZPass User
n = 140
E-ZPass Prospect
n = 154
Resident
n = 152

31 Q27a-h. How likely would you be to adopt each of the following in response to that new toll? ASKED ONLY OF THOSE WHO WORK 3+ DAYS OUTSIDE OF THE HOME

Some Commuters Would Switch Modes in Response to Possible New Toll; They Say They Would Most Likely Try Carpooling, Vanpooling and Teleworking

African-American Prospects and Users with incomes under \$50K are more likely than their counterparts to respond by commuting by bus.

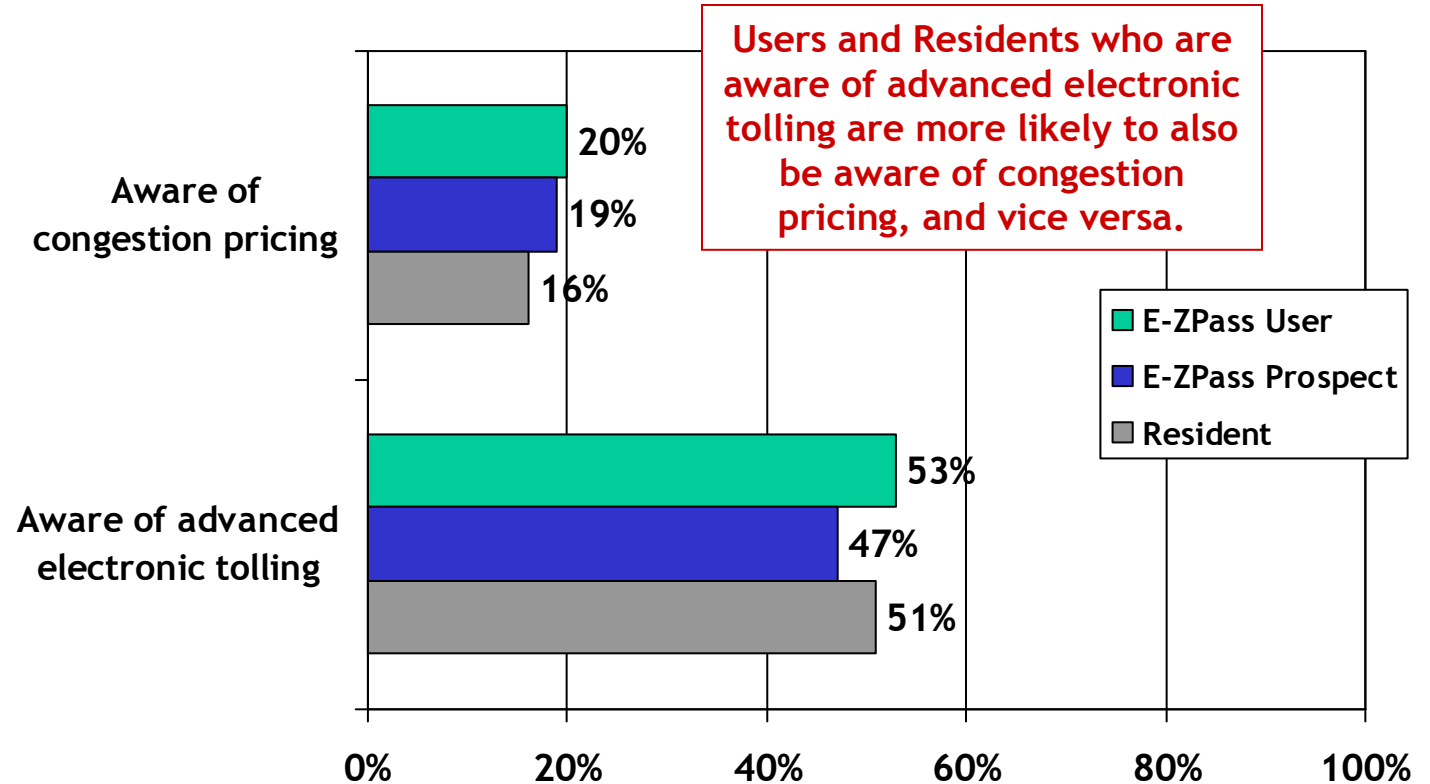
E-ZPass User
n = 140
E-ZPass Prospect
n = 154
Resident
n = 152



32 Q27a-h. How likely would you be to adopt each of the following in response to that new toll? ASKED ONLY OF THOSE WHO WORK 3+ DAYS OUTSIDE OF THE HOME

More Are **Aware** of Advanced Electronic Tolling Than Congestion Pricing

Prospects who are familiar with E-ZPass are more likely than prospects who are not to be aware of advanced electronic tolling.



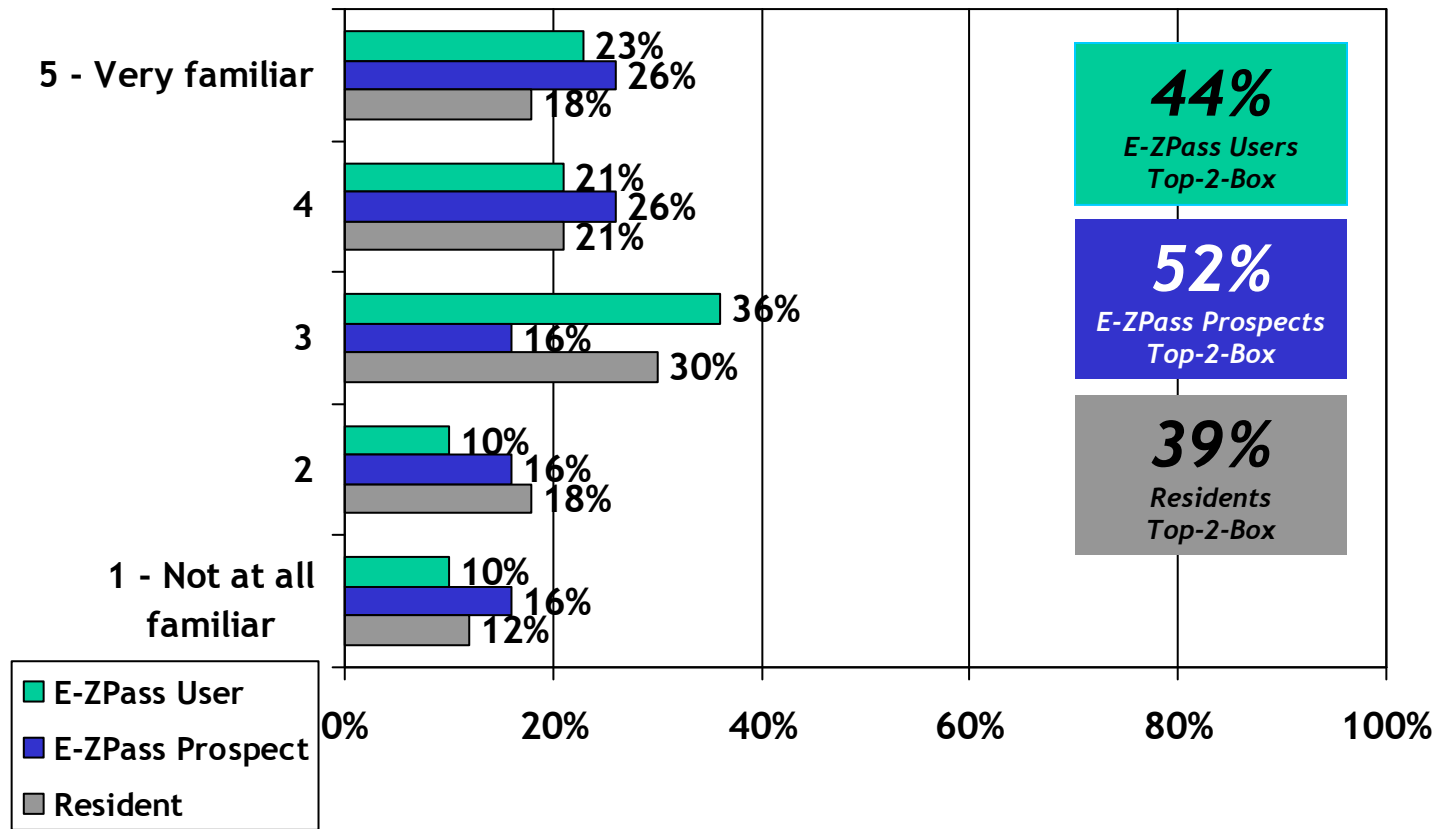
Q28. Prior to this survey, had you ever heard or read anything about a concept called “variable priced tolling,” sometimes called “congestion pricing”?

33 Q30. Prior to this survey, had you heard or read anything about this advanced type of electronic tolling?

Of Those Aware of Congestion Pricing, Prospects Are Most Likely to Say They Are Familiar with It

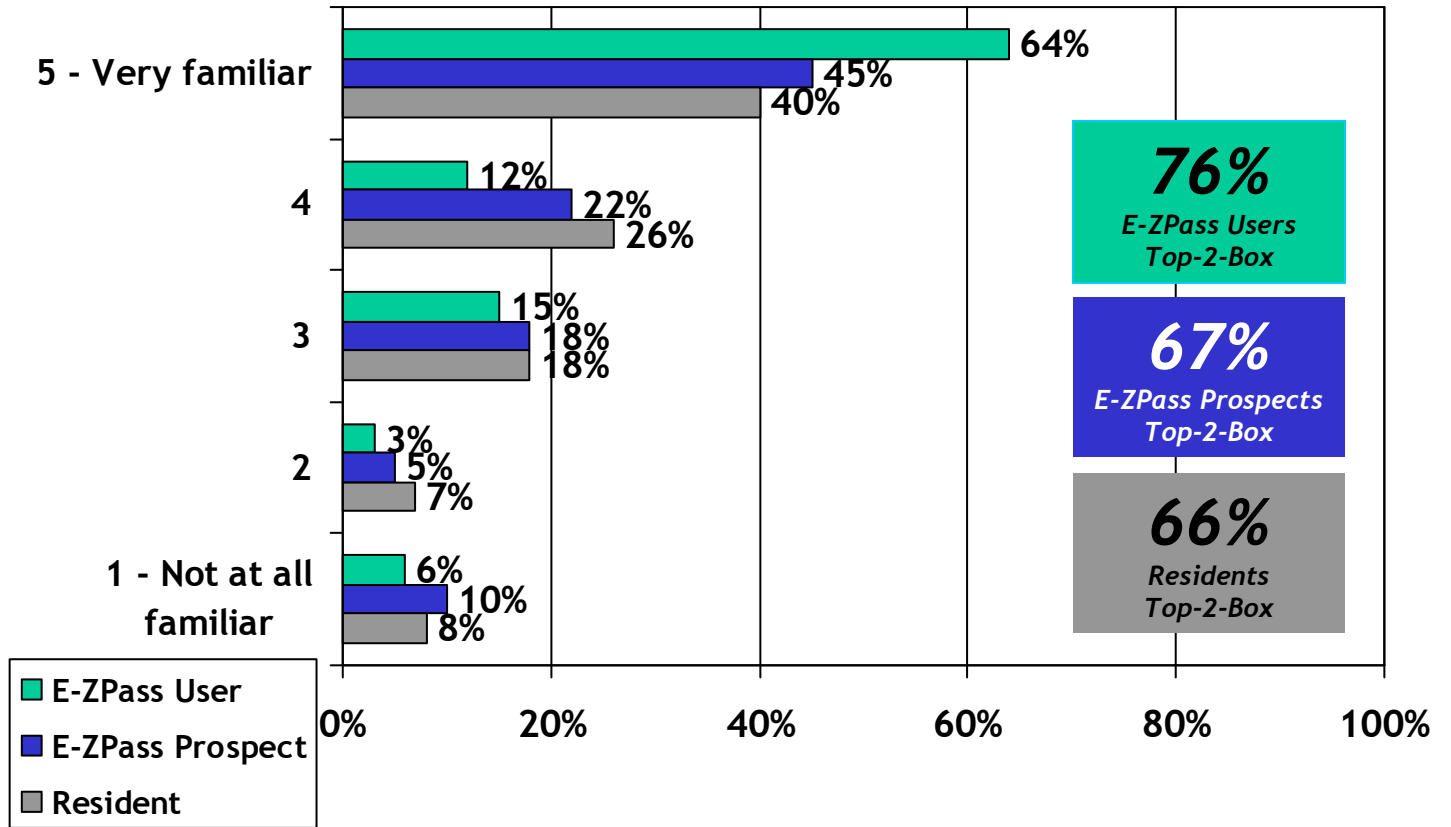
Base sizes small.
Interpret with caution.

E-ZPass User
n = 39
E-ZPass Prospect
n = 38
Resident
n = 33



Q29. How familiar would you say you are with variable priced tolling or congestion pricing? ASKED ONLY OF THOSE AWARE

Of Those Aware of Advanced Electronic Tolling, Most Are Familiar with It



E-ZPass User
n = 105
E-ZPass Prospect
n = 94
Resident
n = 104

Q31. How familiar would you say you are with this type of electronic tolling? ASKED ONLY OF THOSE AWARE

Outline of Report

I. E-ZPass Awareness and Familiarity

II. E-ZPass Usage

III. Prospective Users

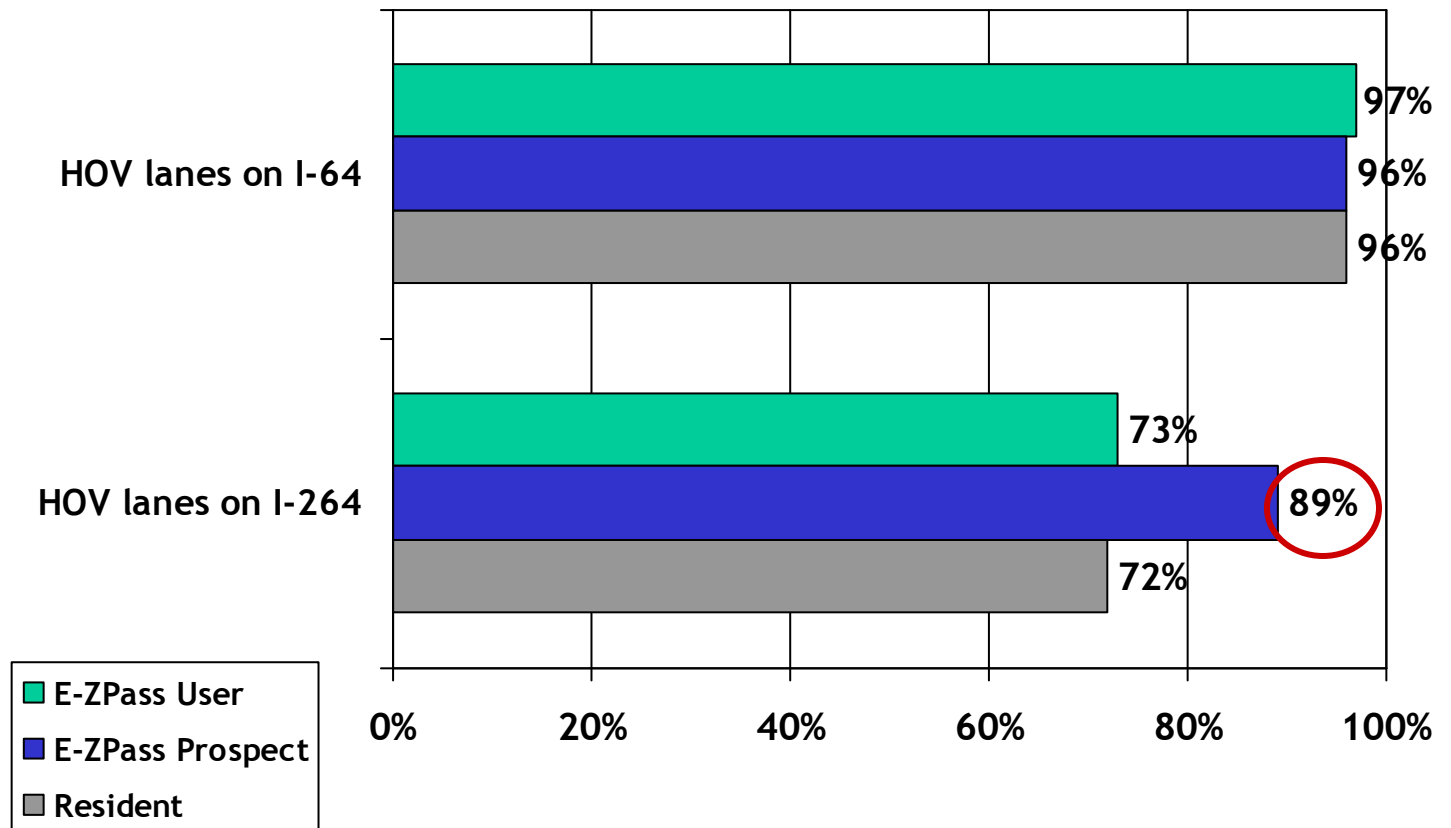
IV. E-ZPass Perceptions

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VII. HOV Lanes Use and HOT Lanes Perceptions

The Three Groups Are Equally Likely to Be **Aware** of the HOV Lanes on I-64; Prospects Are More Likely than Other Audiences to Be **Aware** of the HOV Lanes on I-264



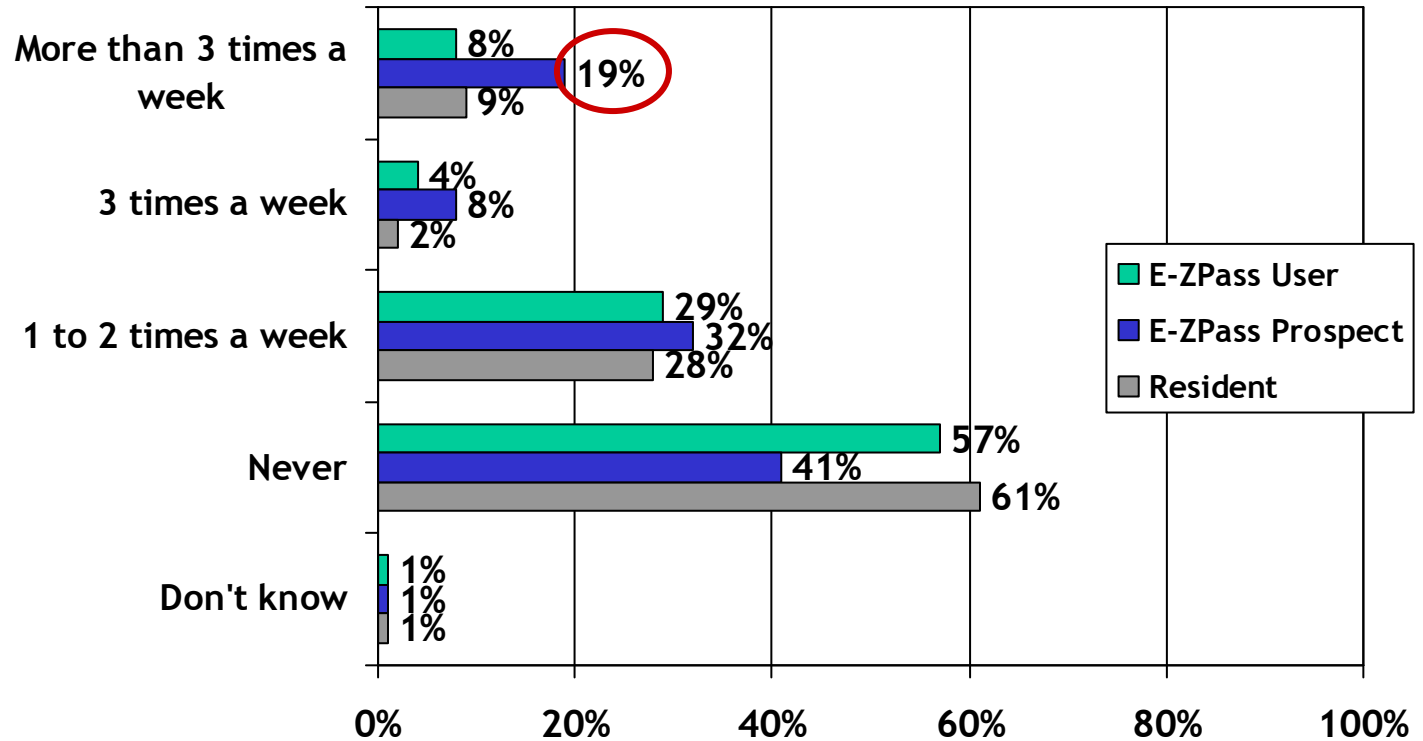
Q36. Prior to this survey, were you aware of the HOV lanes on I-64?

Q41. Prior to this survey, were you aware of the HOV lanes on I-264?

Prospects Are also More Likely to Use the HOV Lanes on I-64

Users, Prospects, and Residents who use the I-64 HOV lanes at least once a week are more likely than Users, Prospects, and Residents who do not to also use the I-264 HOV lanes at least once a week and vice versa.

E-ZPass User
n = 194
E-ZPass Prospect
n = 192
Resident
n = 196

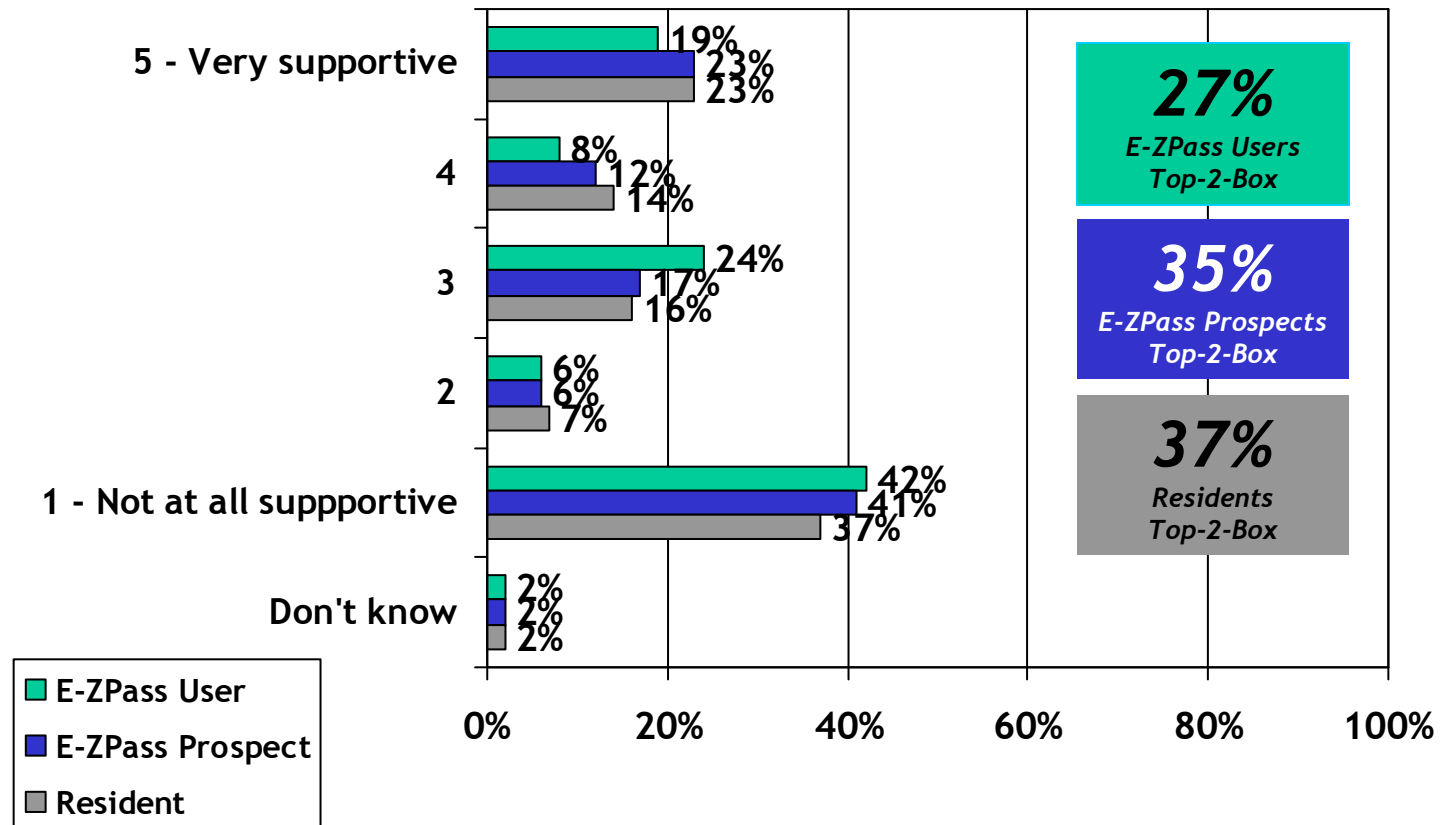


Q38. In a typical week, how often, if ever, do you use the HOV lanes on I-64? ASKED ONLY OF THOSE AWARE

Opinion Leaders are community and civic leaders who have the power & potential to influence others. Some support for HOT lanes already exists among Opinion Leaders. For example, 43% of E-ZPass Prospects who are Opinion Leaders support HOT Lanes on I-64.

E-ZPass User
n = 194
E-ZPass Prospect
n = 192
Resident
n = 196

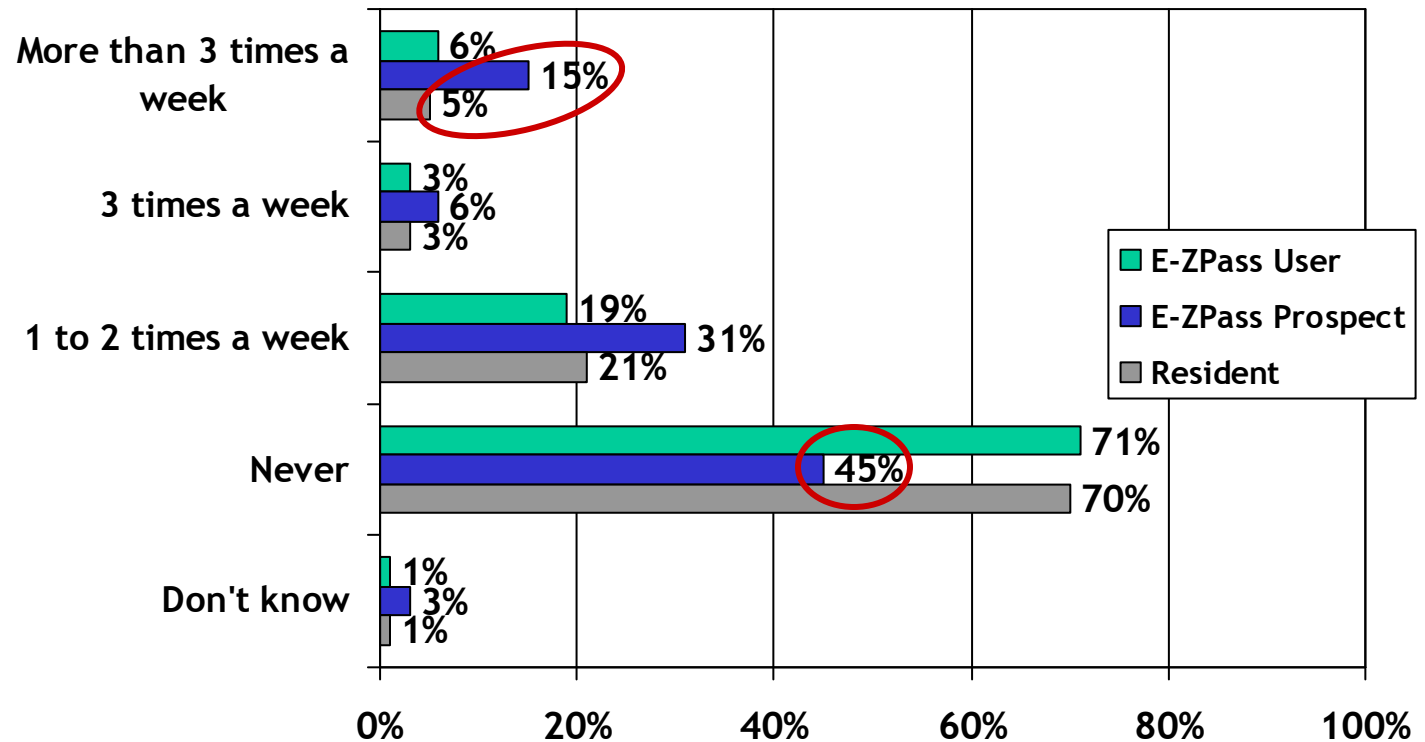
Without Prior Information about HOT Lanes, Roughly a Third Are Supportive of HOT Lanes on I-64; Residents Are Most Supportive



Q39. Based on this description, how supportive would you be of converting the HOV lanes on I-64 to HOT lanes, that is High Occupancy

39 Toll lanes? ASKED ONLY OF THOSE AWARE

Prospects Are Also More Likely to Use the I-264 HOV Lanes



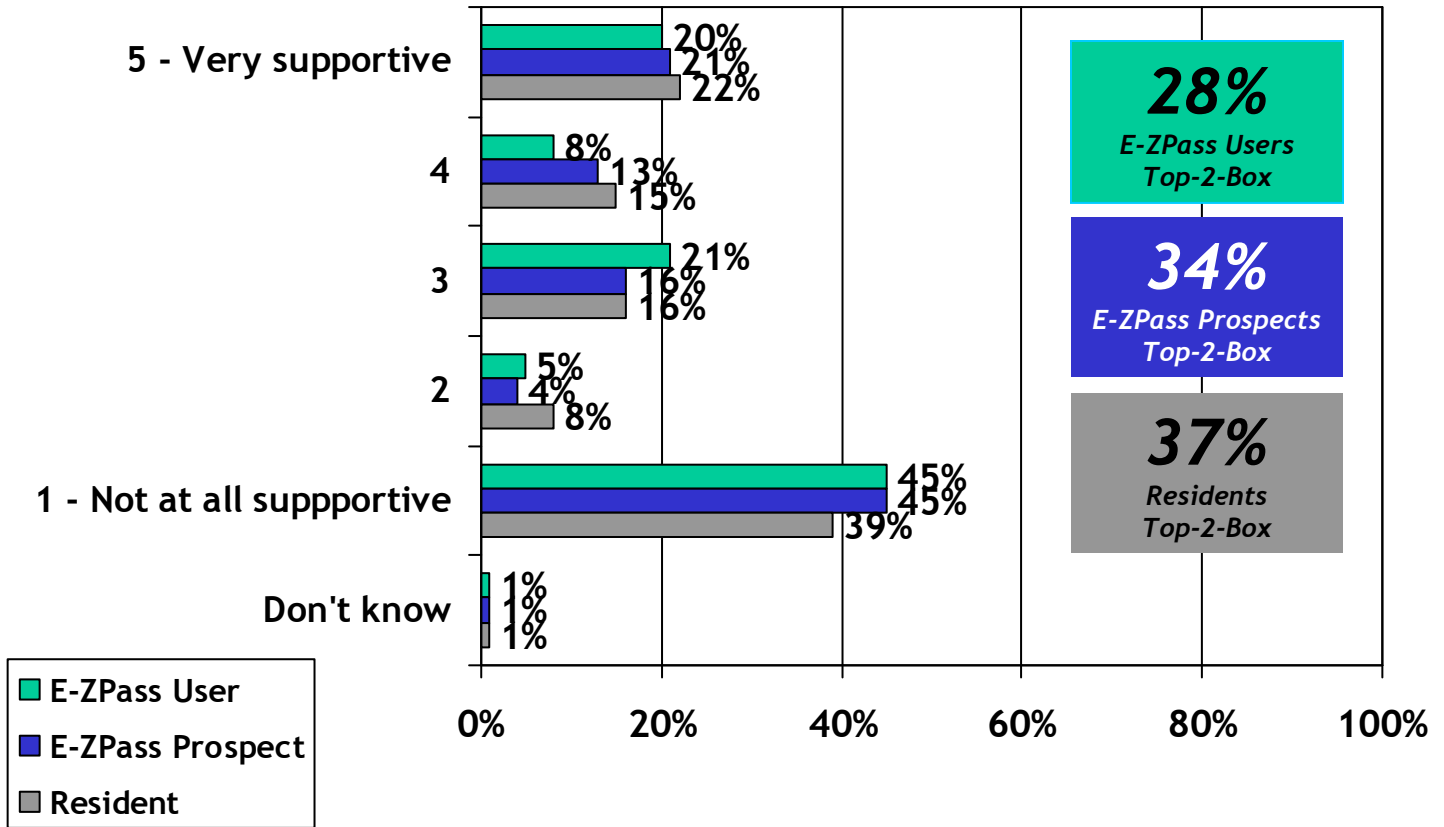
E-ZPass User
 n = 146
 E-ZPass Prospect
 n = 179
 Resident
 n = 148

Q43. In a typical week, how often, if ever, do you use the HOV lanes on I-264? ASKED ONLY OF THOSE AWARE

Similar to Support for the I-64 HOT Lanes, About a Third Support I-264 HOT Lanes

Those in all three groups who are supportive of the HOT lanes on I-64 are more likely than those who are not to be supportive of HOT lanes on I-264.

E-ZPass User
n = 146
E-ZPass Prospect
n = 179
Resident
n = 148



Q44. Based on this description, how supportive would you be of converting the HOV lanes on I-264 to HOT lanes, that is High Occupancy Toll lanes? ASKED ONLY OF THOSE AWARE



Conclusions and Implications

Conclusion & Implication: E-ZPass

Conclusion: Levels of awareness and familiarity with E-ZPass are high among motorists in Hampton Roads, even among those who do not currently use E-ZPass in Hampton Roads. More than three-fourths of E-ZPass Prospects and Residents are aware of E-ZPass; and, about two-thirds of Prospects and Residents who are aware of E-ZPass also say they are familiar with it.

Implication: Significantly growing awareness of E-ZPass among Prospects may not increase their adoption of E-ZPass. Converting Prospects to Users by overcoming their concerns or persuading them of the benefits, ease of usage, and affordability may be more effective than growing awareness.

Conclusion & Implication: E-ZPass

Conclusion: Current Users are especially satisfied with E-ZPass. More than 9 out of 10 current Users say they are satisfied with E-ZPass; and, more than 9 out of 10 would recommend it to family and friends.

Implication: Satisfied users may be good “marketers” for E-ZPass. In fact, they may already be “marketing” E-ZPass through “word of mouth.” Explore the use of “testimonials” or “usage scenarios” with satisfied users to market E-ZPass. In the development of key messages, explore the effectiveness of benefits that Users most value: saving time and not having to carry cash. But, don’t forget the lower income levels of Prospects and the potential appeal of “cost” messages.

Conclusion & Implication: E-ZPass

Conclusion: “Familiarity” increases the likelihood of usage of E-ZPass. E-ZPass prospects are more likely to say they will obtain an E-ZPass in the next year if they are already familiar with it.

Implication: Use marketing and communications as a way to increase familiarity of E-ZPass, not just grow awareness. Use marketing to educate and inform motorists about E-ZPass, not just attract their attention.

Conclusion & Implication: E-ZPass

Conclusion: Both current Users (80%) and Prospects (50%) tend to think the cost is cheaper with E-ZPass than paying at the booth. But, Prospects are much less likely to hold this view. In fact, half of Prospects do not think it is cheaper with E-ZPass. Thus, because they do not have strong reasons to use E-ZPass, have lower incomes than Users, and may not save any money with E-ZPass, they have not obtained an E-ZPass.

Implication: For some Prospects, cost may be a factor in not obtaining an E-ZPass. While they may believe E-ZPass could save them time and is convenient, it also costs money. Explore the development of messages and promotions that educate Prospects about the cost of E-ZPass and any cost savings. Consider the implementation of promotions that offer a cost savings with E-ZPass, e.g., every fifth trip with E-ZPass is free.

Conclusion & Implication: New Tolls

Conclusion: While many commuters say that they would make no changes in their commute in the event of new tolls, about one-fifth would try commuting in a carpool or vanpool or they would telework.

Implication: Other research has indicated that ridesharing awareness and usage is low and underdeveloped in the Hampton Roads' area. Instituting new tolls in the Hampton Roads' area may have an impact on mode choices and provide an opportunity to educate commuters about their commute options. Take advantage of the opportunity to grow the use of ridesharing in Hampton Roads that would be provided by instituting new tolls.

Conclusion & Implication: Advanced Electronic Tolling and Congestion Pricing

Conclusion: Motorists in Hampton Roads are more likely to be aware of and familiar with advanced electronic tolling than congestion pricing.

Implication: Introduction of congestion pricing in Hampton Roads will be more challenging than introduction of advanced electronic tolling. Advanced electronic tolling would start in a more favorable position simply because a greater level of awareness and familiarity already exist.

Conclusion & Implication: HOT Lanes

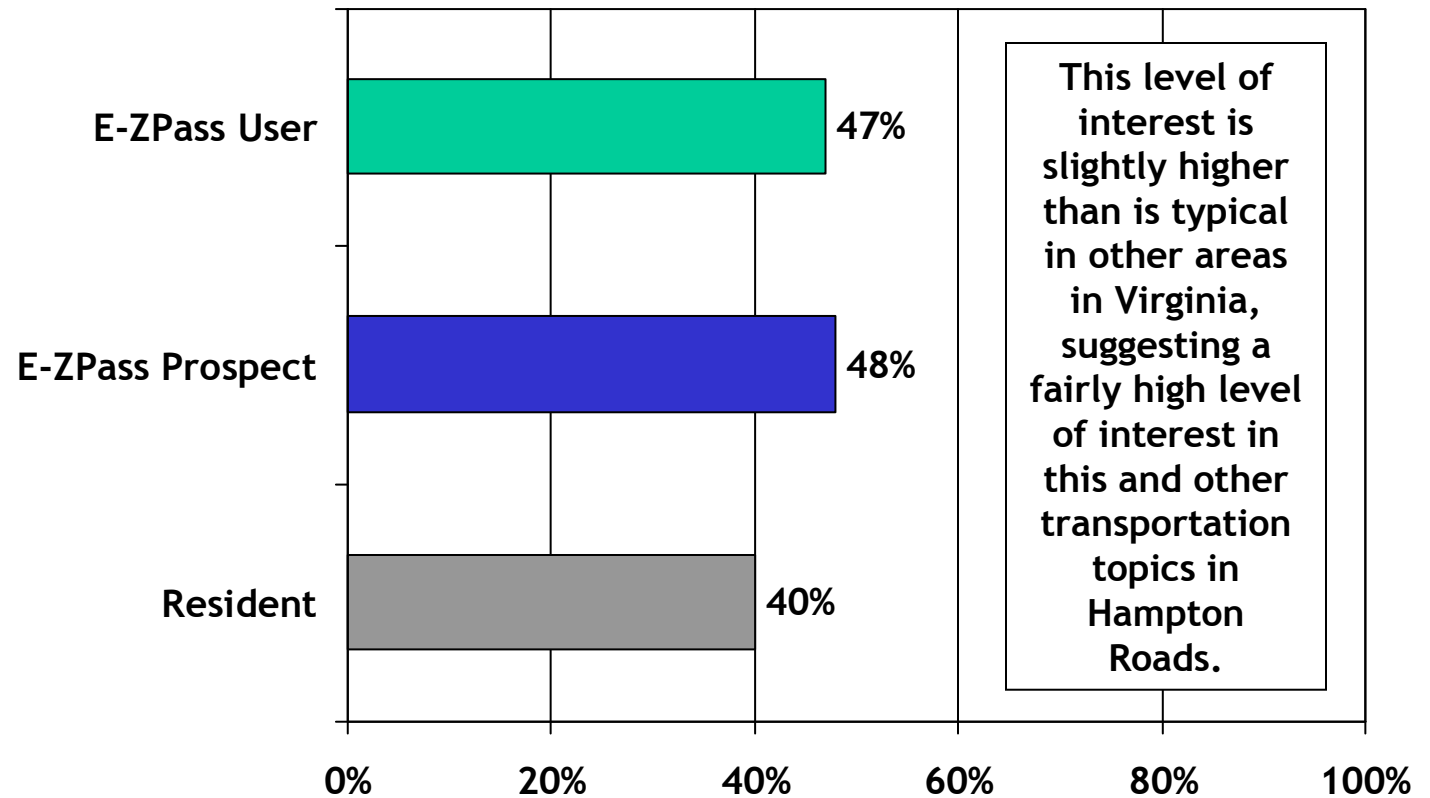
Conclusion: Support for possible HOT lanes on I-64 and I-264 is surprisingly high. Without prior information about HOT Lanes on these routes, about a third of respondents said that they supported making the HOV lanes on these routes into HOT lanes. Some Opinion Leaders are even more supportive. More than 4 out of 10, or 43%, of Prospects who are also Opinion Leaders support HOT lanes on I-64.

Implication: Explore the possibility of implementing HOT lanes on I-64/I-264. HOT lanes could be a way of implementing new tolls in a way that is “acceptable” to residents and introduces them to advanced electronic tolling and congestion pricing. Put in place a strong marketing/communications plan to build on the support that already exists. Explore the potential of utilizing Opinion Leader support by transforming Opinion Leaders into Apostles for HOT lanes.



One Final Observation

Nearly Half of Respondents Agreed to Participate in Future Transportation Research



Q57. Would you be interested in participating in future research, such as focus groups, telephone interviews, or internet surveys, related to transportation issues in your area?



Summary of Key Findings

Summary of Key Findings

- Awareness of E-ZPass is fairly high among motorists in Hampton Roads. It will be difficult to grow awareness higher, and increased awareness will not generate much new usage.
- New usage will come about by persuading Prospects of the benefits and ease of usage and overcoming their concerns about cost.
- Current users are quite satisfied with E-ZPass. Explore utilizing this satisfaction to market E-ZPass to Prospects through testimonials or usage scenarios.
- “Familiarity” increases the likelihood of usage of E-ZPass. Use marketing and communications as a way to educate motorists about E-ZPass and increase familiarity - not just to grow awareness.

Summary of Key Findings

- Concerns about cost seem to be preventing some Prospects from obtaining an E-ZPass. Confront issues of cost directly by developing messages and promotions about cost and cost savings.
- Don't forget benefits that matter to current Users, e.g., saving time and easy payment of tolls. Use marketing messages to reinforce recognition of these benefits among satisfied customers - and, potentially, convert Prospects to Users.
- Introduction of new tolls in Hampton Roads would prompt some commuters to try alternate modes, e.g., carpooling. If new tolls are introduced in Hampton Roads, take advantage of this opportunity to grow ridesharing through a strong marketing and communications program.

Summary of Key Findings

- Awareness of advanced electronic tolling is much higher than awareness of congestion pricing. In fact, only about 20% have heard or read anything about congestion pricing. Strong communications will be necessary to introduce congestion pricing in Hampton Roads.
- Support for possible HOT lanes on I-64 and I-264 is surprisingly high. Implementation of HOT lanes on I-64 and I-264 may be an important way to introduce new tolls and congestion pricing in Hampton Roads. Explore the possibility of implementing HOT lanes on I-64/ I-264.

Thank You!

For additional information on
this report,
please contact
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