

Findings Report

August 26, 2004

2004 I-4 Users and Potential Users Public Opinion Benchmark Study

Conducted June and July 2004

Prepared for

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04-438

2004 I-4 Users and Potential Users Public Opinion
Benchmark Study

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Introduction

In response to the Florida Department of Transportation's FPID No. 242246-1-22-01 Specific Task Assignment No. 2, WMB & Associates, a private statistical and market analysis firm, was retained to design a plan that would offer insight into public opinion in four counties regarding awareness and perceptions of plans for the I-4 corridor. This report presents the results of 1,002 one-on-one interviews among households in Orange, Osceola, Seminole, and Volusia counties during the latter part of June through the end of July 2004.

The response base by residency is as follows...

Respondent's Primary Residency

Residency County	Response Base			
	Actual *	N	%	Weight
Orange	47%	298	30%	1.567
Osceola	8%	203	20%	.400
Seminole	19%	298	30%	.633
Volusia	26%	203	20%	1.400
Base	100%	1,002	100%	

* **Note:** The data are weighted back to the actual distribution of listed households per counts from the 2000 US Census

The overall margin of error for the 1,002-response base is ± 3 percentage points at the 95% level of confidence.¹ For each individual county, the margin for 300 cases is ± 6 points at 95%; for 200 the margin is ± 7 points.

NOTE: The survey findings are, within the stated margin of error, representative of the study audience; Sample sizes smaller than those noted above have a greater margin of error.

Organizational Note: The report is structured according to project purpose and objectives and not sequential as asked in the survey.

¹ Based on a simple random sample of listed households within each target market



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Methodology

Random calls were made to households in the 4-county area.² For each targeted county, an initial quota of 300 interviews was set. This was later reduced to 200 in both Osceola and Volusia counties due to the higher than expected number of persons who did not use I-4 because “it did not go their way” to work.

Each person at least 21 years of age was screened as to length of county residency, time and type of commute to and from work and several employment status questions. See the Appendix for a copy of the questionnaire.

Calls were made between 11:00 AM and 8:00 PM EST, from June 15, 2004 through July 31, 2004. On average, the interview lasted about 14 minutes and accommodated both I-4 commuters as well as those who did not specifically use I-4 though it was available to them if so desired.

Due to the unexpected high incidence of responses that “I-4 does not go my way” [that excluded the respondent from participating in the survey], the random call across counties protocol was revised for both Osceola and Volusia. Beginning July 1, 2004, only select zip codes that FDOT and Global-5 deemed more applicable to the study were called. Also, beginning July 10, 2004, respondents who left for work before 6:00 AM were included in the commute departure time screen.

This report provides the results from this effort.

² Calls were made to a random sample of listed households in each of the four counties involved in this study by Resolution Research & Marketing Inc of Denver, Colorado



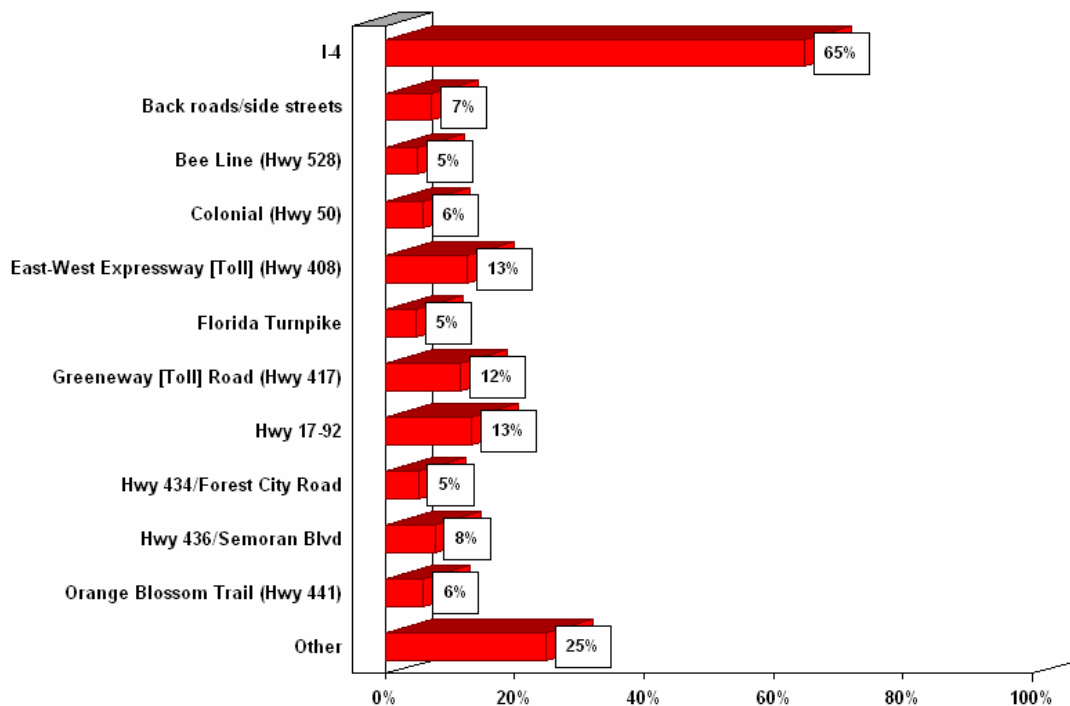
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Findings

Road Usage for Commute

The screening criteria ensured that this study's focus was on persons who use I-4 in their commute to and from work; it also included persons who could have used I-4 but for some reason chose to take an alternate route. Even so, it is noteworthy that two out of three [65%] respondents use I-4 during their commute to and from work. Aside for "various back roads and other connectors [in the "Other" category]," the study finds that the East-West Expressway [13%], Highway 17-92 [13%] and the Greenway [12%] are the principal arteries for area commuters.³

1. What "major" roadways do you "currently" use to and from work?



Note: Multiple responses allowed

³ This does not represent a "market usage indicator;" the participant screening criteria was set to limit persons who did not use I-4. Further, screening also focused on those persons who left for work between 6:00 AM and 9:00 AM.



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As noted above, this is not a roadway usage study; it does offer insights into adjunct roads used to commute to and from work. As expected, due to the study's screening criteria, respondents mention I-4 most often, as seen in the table below. Further, the table shows that more respondents who live in Volusia County also mention Highway 17-92 [30%]. Orange County respondents tend to also use the East-West toll road [23%] and Seminole respondents use Highway 436 during their commute to and from work [19%] or the Greenway [17%].

From this, it appears that the principal commuter roads, beyond I-4, involve the East-West Expressway [Hwy 408], Highway 17-92, and the Greenway [Hwy 417].

1. What "major" roadways do you currently use to and from work?

	Overall	County			
		Orange	Osceola	Seminole	Volusia
I-4	65%	60%	56%	67%	75%
East-West Expressway [Toll, Hwy 408]	13%	23%	2%	7%	2%
Hwy 17-92	13%	3%	9%	17%	30%
Greenway Road [Toll, Hwy 417]	12%	10%	9%	17%	12%
Semoran Blvd [Hwy 436]	8%	8%	1%	19%	1%
Back roads/side streets	7%	7%	9%	7%	7%
Orange Blossom Trail [Hwy 441]	6%	10%	7%	2%	0%
Colonial [Hwy 50]	6%	12%	1%	1%	0%

Note: Multiple responses allowed; Top Used Roads Listed

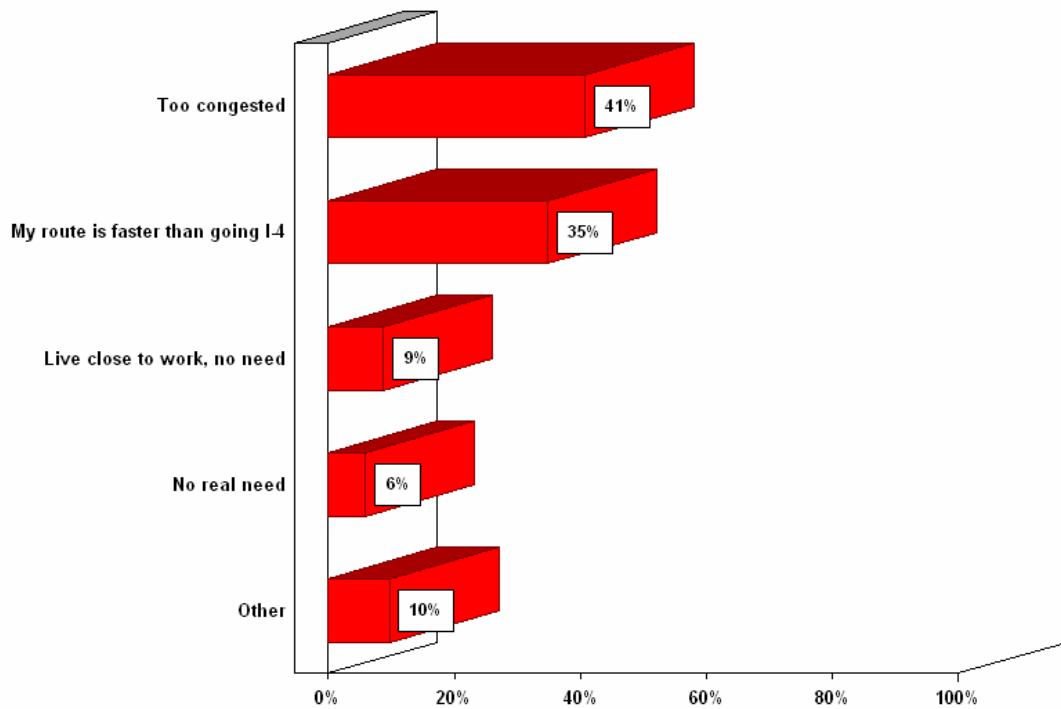


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For respondents who do not use I-4 during their commute to and from work, though it did go their way, the primary reason for not using is that it is “too congested [41%]” followed by “their route is faster [35%]” or that h/she “lives close to work so there is no real need [9%].” Other reasons include “work takes me all over area, no need” and “could use but prefer not to.”

The affect of congestion is not county dependent, and there is no significant difference regarding residency. There also is no significant difference based on time of departure for work.

2. Did not use I-4 in commute to and from work - Reason(s)



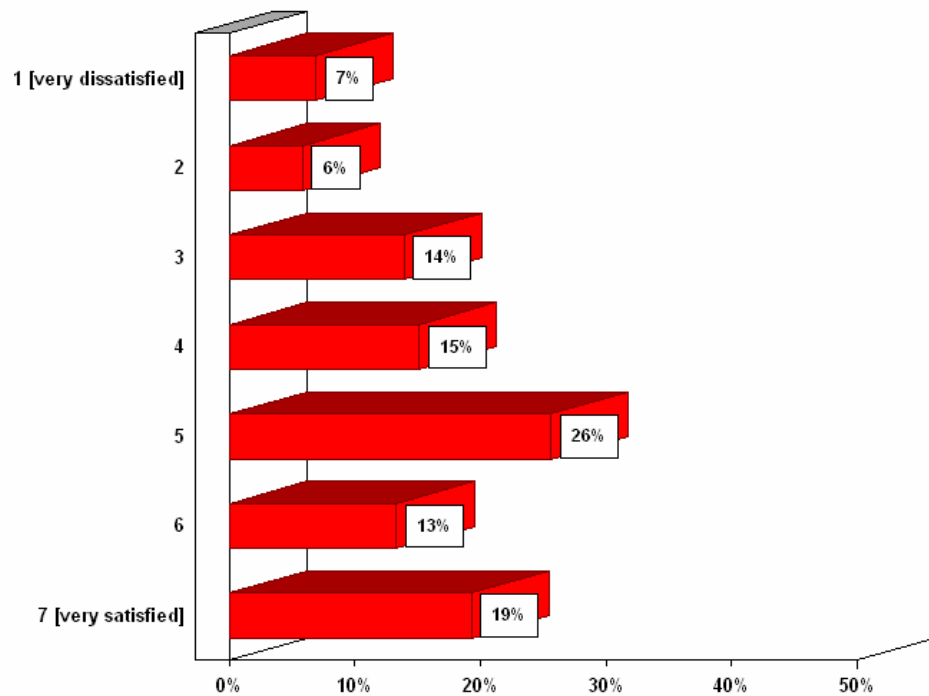
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On average, respondents travel about 10 miles one-way to their work [survey question 3] and are “reasonably” satisfied with their commute time [mean response of 4.64 out of 7.00⁴]. Satisfaction is highest among Volusia County respondents [4.94] and lowest for those who live in Seminole County [4.44].

Overall, 32% of the respondents are satisfied as defined by the “top 2 scores,” that is the sum of responses 6 and 7, whereas 13% are dissatisfied [bottom 2 scores].

Even so, compared to the overall mean rating, there is no significant difference in the ratings by county or commute departure time.

4. Considering the distance you commute to work, how do you rate your level of satisfaction with your commute time?



	Overall	County			
		Orange	Osceola	Seminole	Volusia
Mean	4.64	4.57	4.52	4.44	4.94

⁴ Based on a seven-point Likert scale from “very dissatisfied [1]” to “very satisfied [7]”

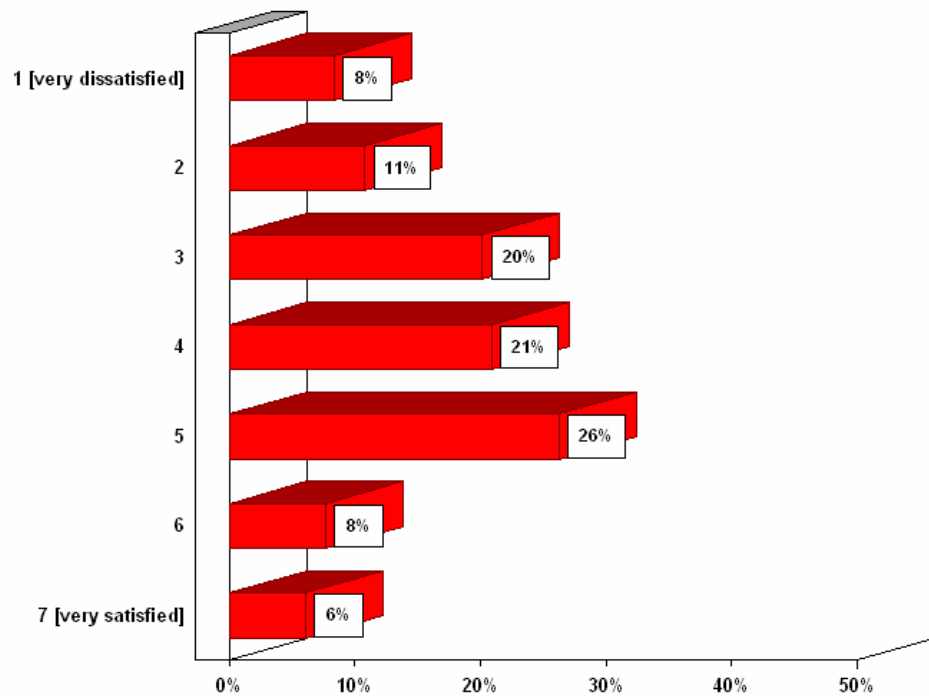


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Overall, study respondents tend to be somewhat more “dissatisfied” in their opinion of the roads in Central Florida than “satisfied” as noted in the overall mean response of 3.93 out of 7.00. Respondents from Volusia County [4.13] are more satisfied than any other county residents.

These results are amplified with 19% saying that they are dissatisfied [bottom 2 scores, i.e., the sum of response scores 1 and 2] compared to 14% [top 2 scores, sum of scores 6 and 7] being satisfied.

5. Overall, how do you rate your level of satisfaction with the roads in the Central Florida area?



	Overall	County			
		Orange	Osceola	Seminole	Volusia
Mean	3.93	3.83	3.86	3.93	4.13

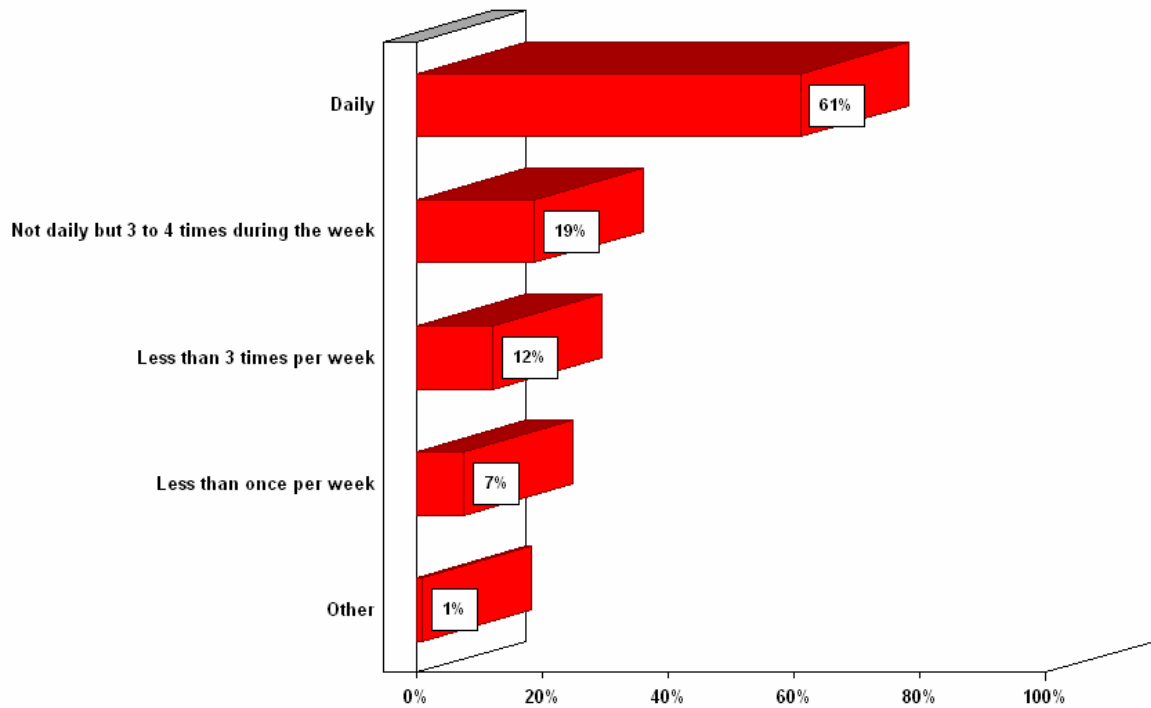


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I-4 Usage

When I-4 is used, it is done so frequently: 61% use it daily.⁵

7. Use I-4 in commute to and from work, generally use I-4:



⁵ Question 6 on page 20, a part of “Belief in the Future” section



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For I-4 users, the frequency of usage for this principal area artery is much higher among Volusia [68%] and Seminole County respondents [67%] compared to 61% overall. Persons from Osceola County seem to be less frequent users, though still consistent [48%].

7. Usage of I-4 for commute to and from work

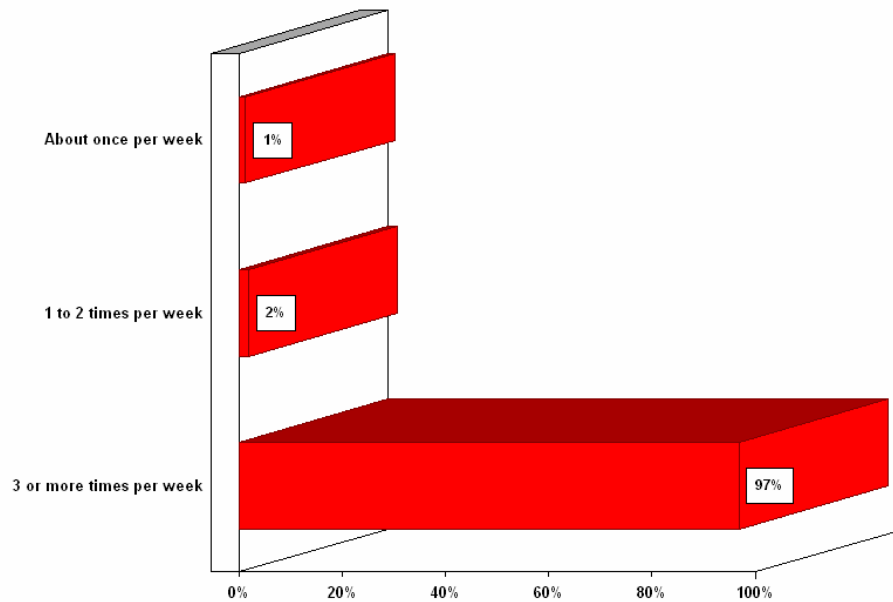
	Overall	County			
		Orange	Osceola	Seminole	Volusia
Daily	61%	57%	48%	67%	68%
Not daily but 3 to 4 times during the week	21%	24%	16%	13%	23%
Less than 3 times per week	11%	12%	21%	12%	5%
Less than once per week	7%	7%	13%	7%	5%
Varies	0%	0%	2%	2%	0%



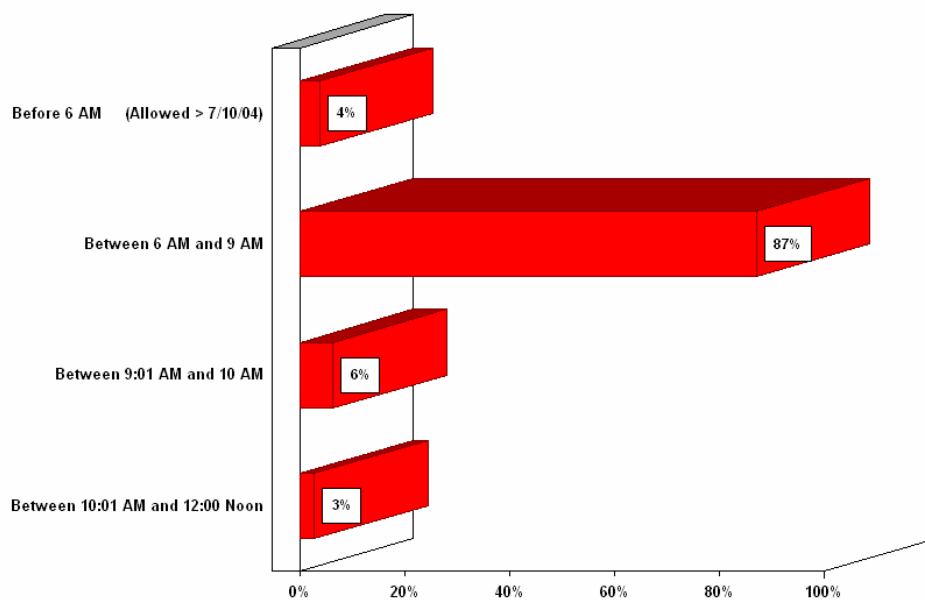
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Reiterating that this study cannot be considered a commuter study due to the screening criteria which enforced a focus on I-4; it does offer some insight into the commute experience: The vast majority of respondents commute to work frequently during the week and early during the morning. These results are consistent across the four study counties.

Frequency of drive or carpool to and from work



Time of the day typically commute to work



Note: As of July 10, 2004, persons departing prior to 6 AM were included in the study



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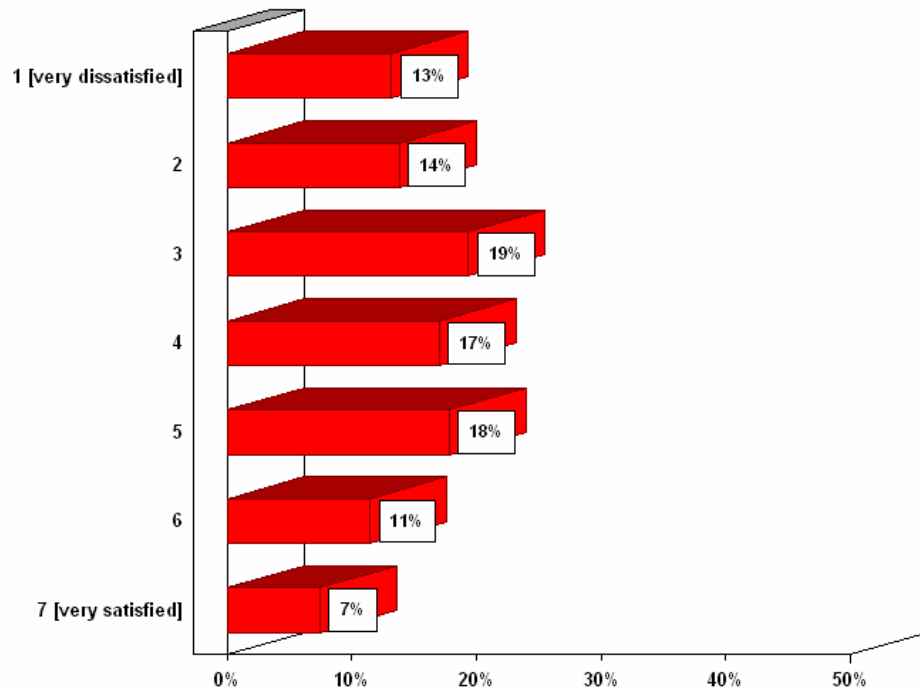
Satisfaction

Overall satisfaction among I-4 users with their I-4 commute time is “less than ideal” [3.77 mean response out of 7.00]. Seminole [3.39] and Osceola [3.49] County respondents are the least satisfied [comparing their mean response to the overall], whereas Volusia County participants are the most satisfied group [4.33].

This is particularly true based on the top and bottom 2 scores with 27% “dissatisfied” and 18% “satisfied.”

The level of satisfaction is specific to the I-4 portion of the commute time. As noted earlier, 32% are satisfied with their overall commute time compared to 18% who are satisfied with the time spent on I-4. In contrast, 13% are dissatisfied overall versus 27% being dissatisfaction with the I-4 portion of the commute.

8. Rate overall level of satisfaction with commute time on the I-4 portion of commute to and from work?



	Overall	County			
		Orange	Osceola	Seminole	Volusia
Mean	3.77	3.59	3.49	3.39	4.33

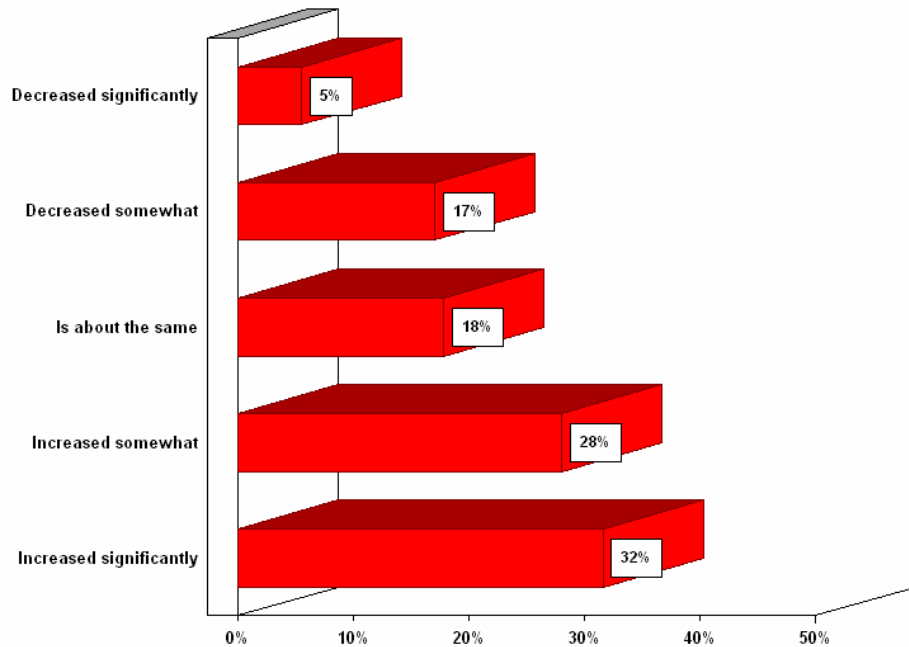


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Congestion on I-4

There is a strong perception that congestion on I-4 has changed over the past year. I-4 users as well as non-users who avoid I-4 due to its congestion say that conditions have increased “significantly” over the past year [32%]. More importantly is that fully 60% of these two respondent groups say that congestion along I-4 has at least increased “somewhat” [top 2 scores].

9. Over the past year, congestion along I-4 has:



Osceola County respondents have seen a higher increase in congestion than those from Volusia County: mean response of 4.05 compared to 3.06, respectively.

	Overall	County			
		Orange	Osceola	Seminole	Volusia
Mean	3.63	3.94	4.05	3.56	3.06

Non-I-4 users note the congestion increase much more so than users: 4.09 mean compared to 3.52.

	Overall	I-4 User	
		Yes	No
Mean	3.63	3.52	4.09

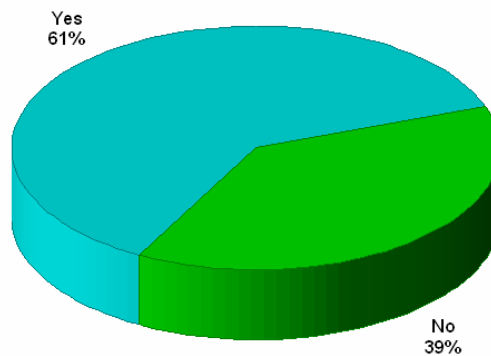


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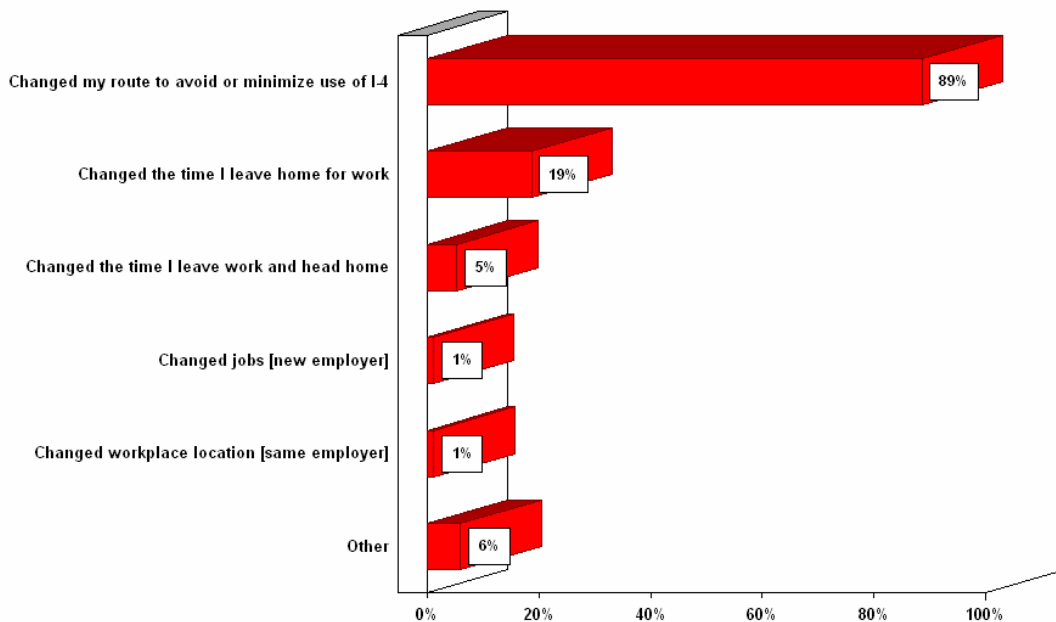
Changes in Commute Pattern

Almost two-thirds [61%] of the respondents say that they altered their commute due to I-4's congestion; the vast majority chose to change their route, others decided to change the time they left for work.

10. Altered commute to or from work in any way because of the congestion on I-4?

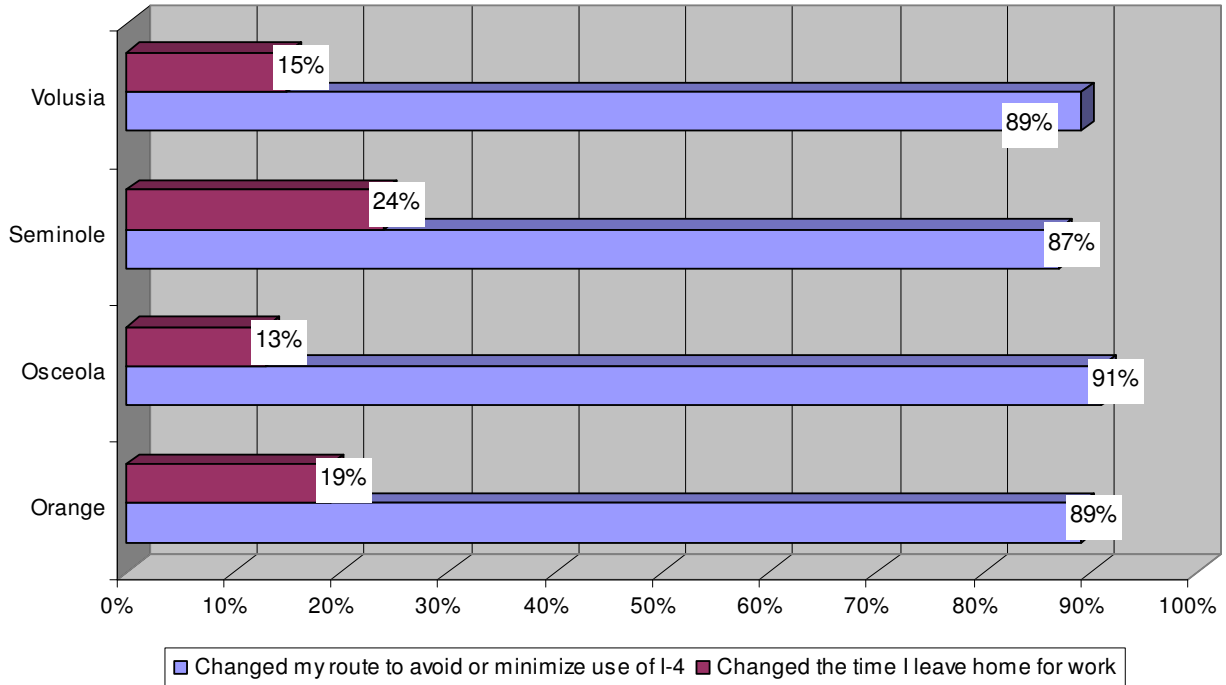


How altered commute?



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While persons from Osceola County tended to change their route most often [91%]; those from Seminole County are more likely to change their departure time [24%].



Note: Multiple responses allowed



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I-4 users and those non-users who avoid I-4 due to its congestion, perceive traffic volume [42%] and an increase in the area's population [25%] as the primary causes for the congestion on I-4.

Beyond traffic volume, Orange County respondents notice the growth in the area's population [31%], whereas those from Osceola County seem affected more by the number of tourists [27%], compared to the overall opinion of respondents. Construction is noted as a cause of congestion by Volusia County respondents [24%].⁶

12. What would you consider to be the primary causes of congestion on I-4?

	Overall	County			
		Orange	Osceola	Seminole	Volusia
Traffic volume	42%	43%	46%	40%	41%
Population growth	25%	31%	22%	23%	19%
Tourists	18%	20%	27%	17%	12%
Construction	18%	14%	21%	15%	24%
Congestion	17%	17%	15%	21%	14%
Crashes	15%	12%	12%	11%	23%
Too few lanes	10%	9%	7%	11%	10%
Few alternatives	9%	12%	6%	10%	6%

Note: Due to the response base, the List is limited to top eight mentioned reasons. Multiple responses allowed. Includes any causes that were post-classified from question 13

⁶ Question 11 on page 21, a part of "Belief in the Future" section



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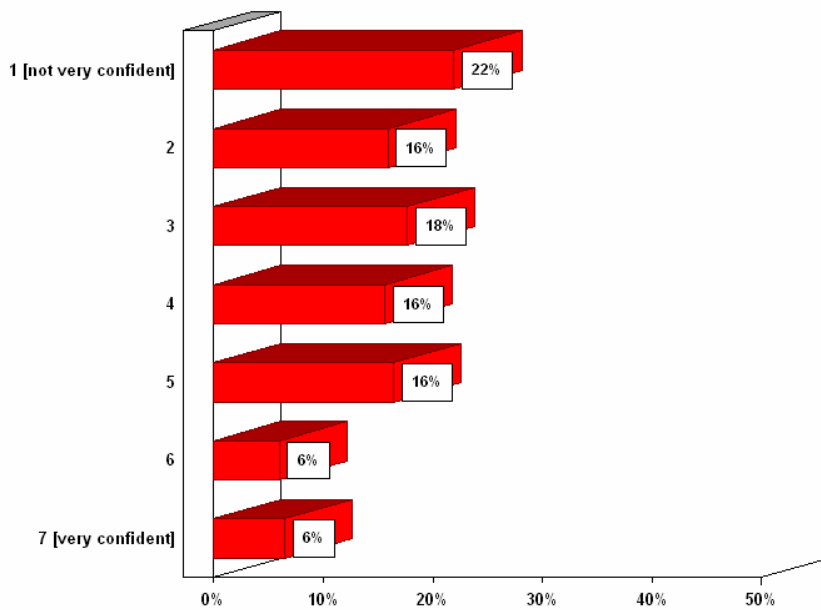
Belief in The Future

Prior to introducing any comments and questions regarding the I-4 “Master” or “Ultimate” Plan, respondents were asked their opinion about the future traffic situation.

The graphics and tables that follow do not display a “vote of confidence.”

Thirty-eight percent of respondents lack confidence in Central Florida having a viable transportation system over the next 10 years [sum of responses 1 and 2, lower 2 scores].

6. All things considered, how confident are you that there will be a viable transportation structure to meet Central Florida’s needs over the next 10 years?



Confidence is lowest among Seminole County respondents [mean response of 3.07 out of 7.00].

	Overall	County			
		Orange	Osceola	Seminole	Volusia
Mean	3.32	3.30	3.52	3.07	3.50

I-4 users seem to be more pessimistic than non-users.

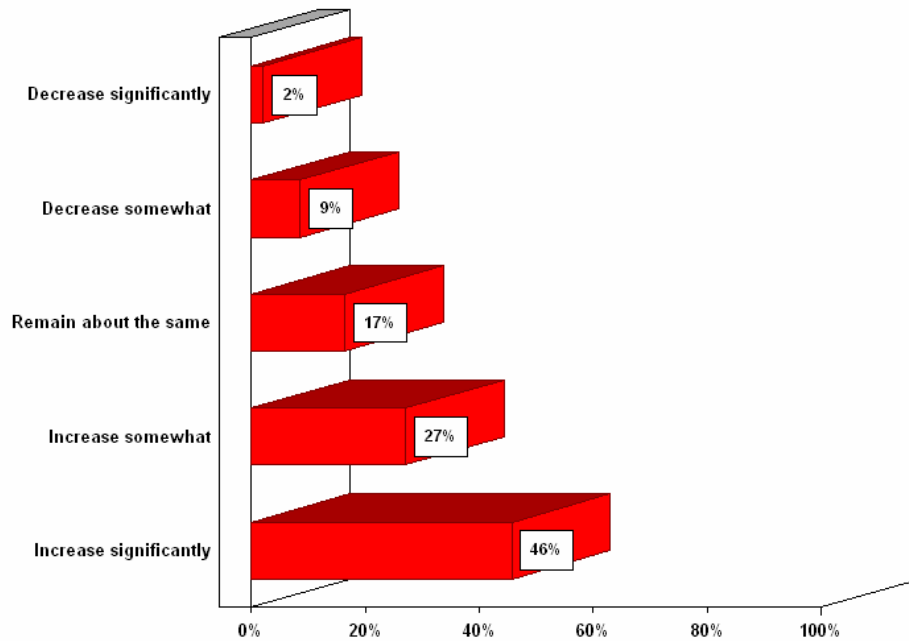
	Overall	I-4 User	
		Yes	No
Mean	3.32	3.27	3.29



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Not only do respondents lack confidence that a highway system will be in place over the next 10 years to meet the area's needs, they also believe congestion will increase during this period: 73% say congestion will "increase" at least somewhat.

11. In your opinion, regardless of what has been done or is planned to be done to I-4, do you believe congestion over the next 10 years will:



Comparing the response pattern between the opinion question noted in the prior page [question 6 regarding a viable transportation structure over the next 10 years] and the finding from above, it is clear that all respondents tend toward pessimism: They lack confidence in having a viable structure [overall mean response of 3.32 out of 7.00], and they believe congestion will increase during that period regardless of what has been done or is planned [4.06].

	Overall	County			
		Orange	Osceola	Seminole	Volusia
Mean	4.06	4.05	4.10	4.18	3.98

There is nominal difference in opinion between I-4 users and non-users.

	Overall	I-4 User	
		Yes	No
Mean	4.06	4.09	3.90

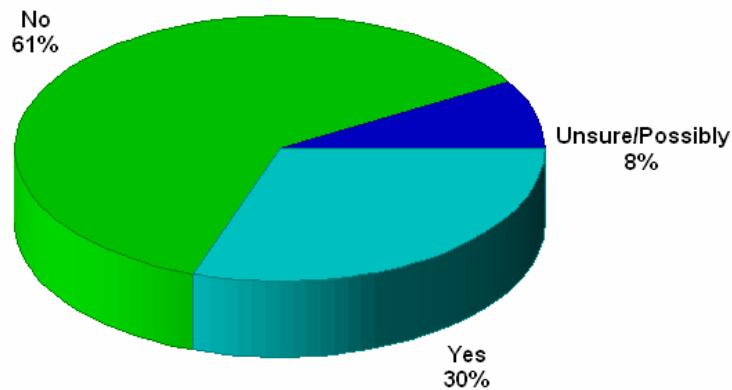


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I-4 Master or Ultimate Plan

Fully 61% of all respondents say that they are not aware of FDOT's "Master" or "Ultimate" Plan to reconstruct I-4.

14. Beyond the recent construction on I-4, are you aware that the State Highway Department has created a Master Plan, called the "Ultimate Plan," to reconstruct all of I-4?

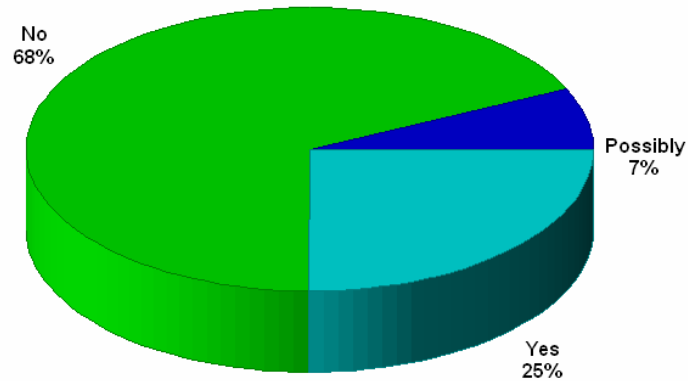


Moreover, as the graphic on the next page shows, two-thirds [68%] of the respondents are unaware of any plans to add toll lanes on I-4. Of the 25% who are aware, just under half [45%] believe that these will involve new additional lanes [Aided question - Each choice was read to the respondent who could then offer one response.]

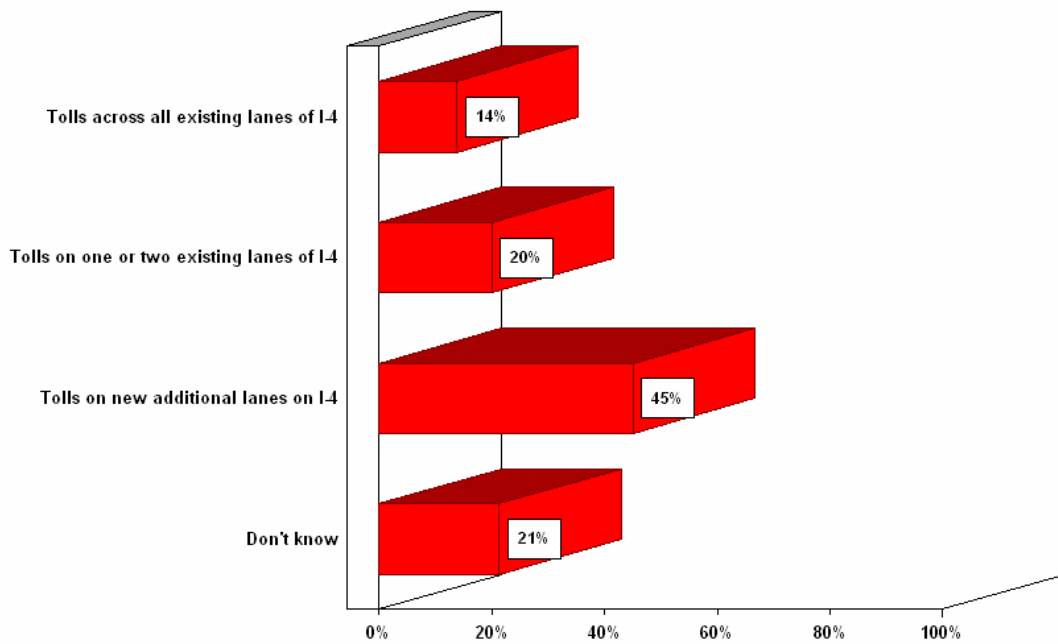


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15. Aware or have heard of any plans to place tolls on I-4?



Based on your understanding of the plans to place tolls on I-4, which of the following best describes your understanding of the primary approach?



Note: Response base is those who were aware from question 15 above



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Awareness of placing tolls on I-4 is highest among respondents from Seminole County [31% compared to 25% overall] and lowest among Osceola and Volusia residents who participated in the survey [18% each].

	Overall	County			
		Orange	Osceola	Seminole	Volusia
Yes	25%	28%	18%	31%	18%
No	68%	65%	70%	62%	76%
Possibly	7%	7%	12%	7%	5%

There also is limited difference in awareness between I-4 users and non-users.

	Overall	I-4 User	
		Yes	No
Yes	25%	27%	20%
No	68%	65%	75%
Possibly	7%	8%	5%

Of the 25% of respondents who are aware that tolls will be placed on I-4, users of I-4 are more of the impression that tolls will be placed on new additional lanes [50%] than non-users [15%].

	Overall	I-4 User	
		Yes	No
Tolls across all existing lanes of I-4	14%	10%	21%
Tolls on one or two existing lanes of I-4	20%	20%	33%
Tolls on new additional lanes on I-4	45%	50%	15%
Don't know	21%	20%	32%



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I-4 Master or Ultimate Plan Perceptions

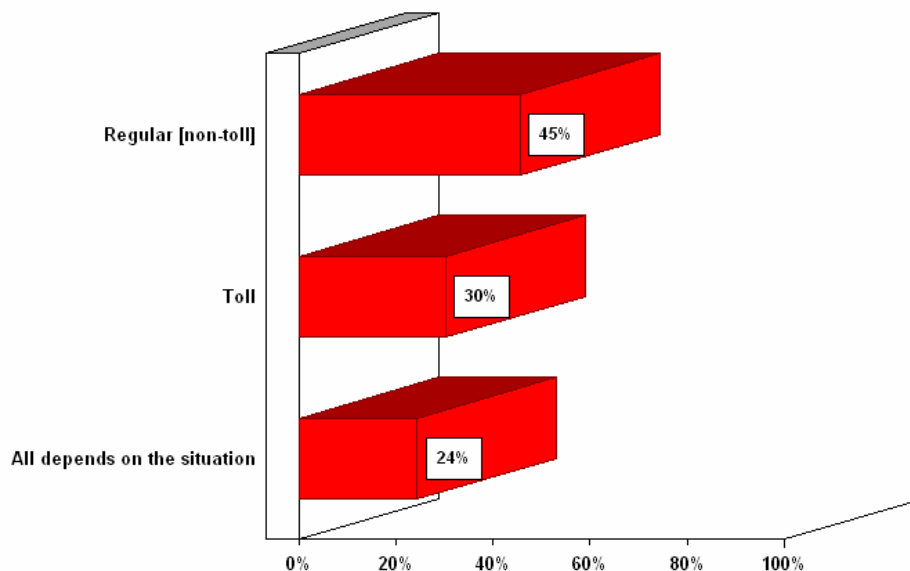
Prior to seeking awareness and perceptions of the specific plan being implemented by FDOT, the following “informational paragraph” was read to each respondent. The interviewer then verified understanding but did not offer any interpretations or answer any questions to ensure no influential affect. If the respondent was unsure of its understanding the statement was re-read.

The Florida Department of Transportation [FDOT] has created an I-4 “Master” or “Ultimate” Plan that will build four new additional lanes down the middle of I-4, two in each direction. The new lanes will be tolled and separated from the regular I-4 lanes with concrete barriers. A minimum number of entrance and exit points to the toll lanes are provided from the regular lanes. Tolls will be collected using a nonstop electronic system like E-Pass and SunPass. Toll rates will be varied throughout the day - higher during rush hours and lower during other times of the day to guarantee that traffic in the toll lanes will not be congested.

When given the choice, four-in-ten would stay on the regular, non-toll lanes and one-third would switch over to the toll lanes. As might be expected, there are those who will “wait and see.”

Respondents who currently have an E-Pass or SunPass or both [multiple responses allowed] are more likely to use the toll lanes than those who do not, 43% to 22%, respectively. For more information regarding holders of toll transponders see the related section that follows.

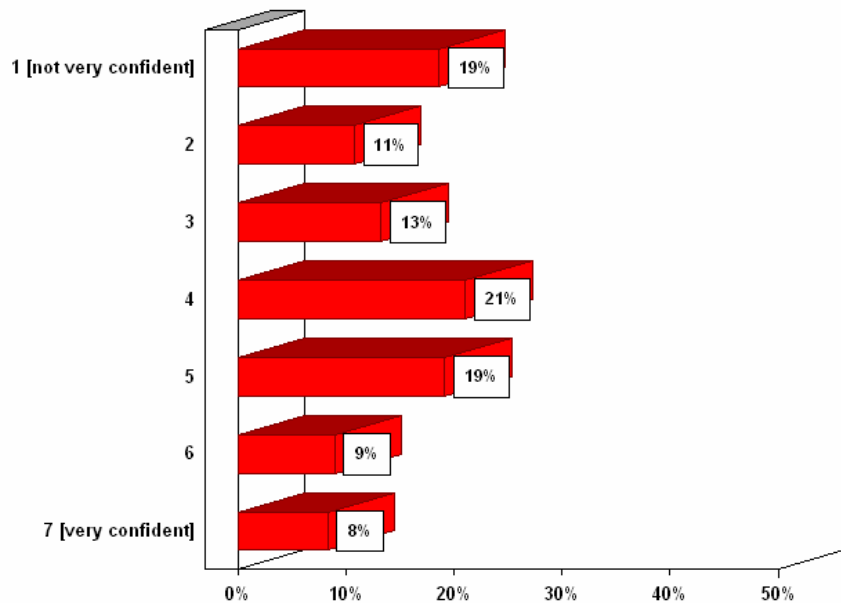
16. The I-4 Master Plan will offer a choice between regular lanes that are affected by congestion buildup and toll lanes designed to manage congestion and provide smooth flowing traffic. Assuming tolls will be reasonable and comparable to those on other toll roads in the Central Florida area, which type of lane would you most likely use in your commute to and from work?



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With the relatively high level of respondents who are not aware of the I-4 “Master” or “Ultimate” Plan and the general lack of confidence that there will be a viable transportation structure over the next 10 years to meet Central Florida’s needs, it is understandable why participants are tentative in their belief that the Plan will help improve the area’s transportation situation. About one-third [30%], overall, are not confident [bottom two response scores] compared to 17% who are confident [top two response scores]. The majority response is more “neutral” [mean response of 3.72 out of 7.00].

17. Now that you have heard [description read earlier] about the State Highway Department’s Master Plan for I-4 and know the plan’s concept for adding toll lanes to I-4, how confident are you that the Plan will be able to improve transportation for the future of Central Florida?



	Overall	County			
		Orange	Osceola	Seminole	Volusia
Mean	3.72	3.76	3.94	3.73	3.56

There is very little difference between the average level of confidence between I-4 users and non-users.

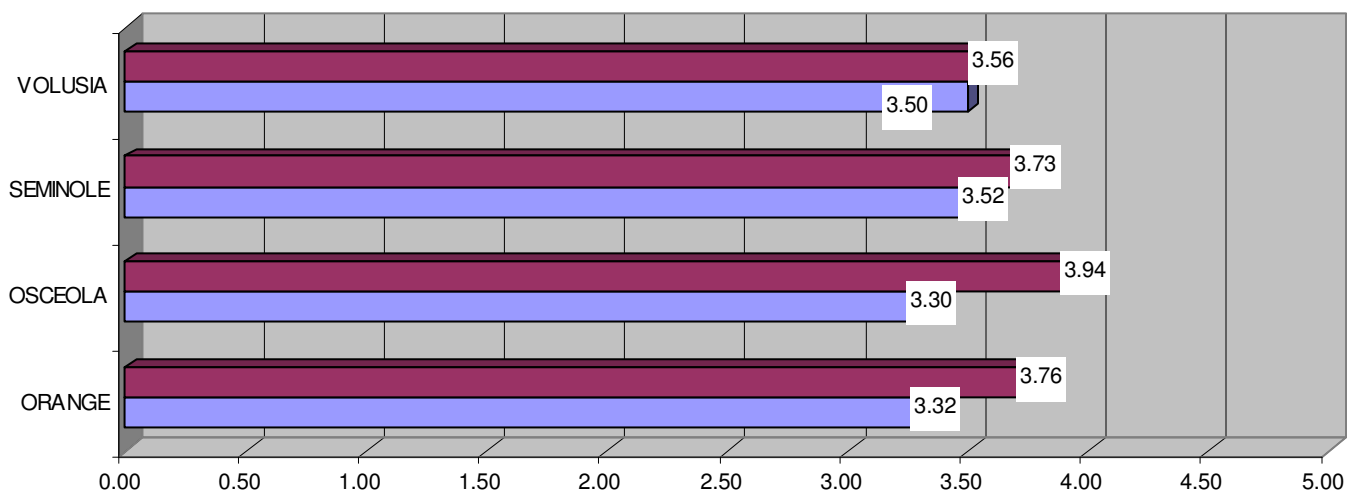
	Overall	I-4 User	
		Yes	No
Mean	3.72	3.70	3.74



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On the other hand, once presented with the proposed I-4 “Master” or “Ultimate” Plan, the concept does appear to have a positive affect on respondents’ confidence about Central Florida’s future transportation infrastructure. As seen in the graphic below, there is an increase in confidence for respondents from all counties comparing the mean confidence rating before hearing about the Plan [question 6] and after hearing about it [question 17]. Overall, the mean change in confidence pre-[3.32] and post-awareness [3.72] is a significant increase.⁷

Confidence in Transportation Structure Before [Q6] & After [Q17] Hearing About the Master or Ultimate Plan



Comparing Questions:

- 17. Now that you have heard about the State Highway Department's Master Plan for I-4 and you know the plan's concept for adding toll lanes to I-4, how confident are you the Plan will be able to improve transportation for the future of Central Florida?
- 6. All things considered, how confident are you that will a viable transportation structure to meet Central Florida's needs over the next 10 years?

⁷ Tests of significance based on the unweighted means

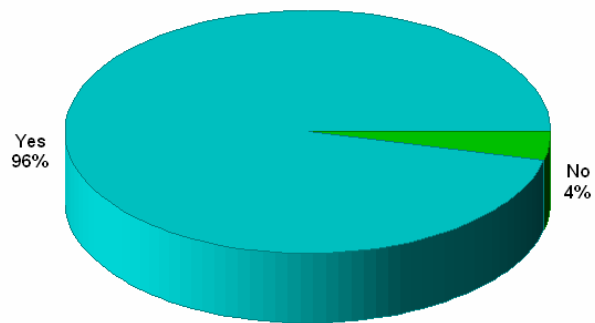


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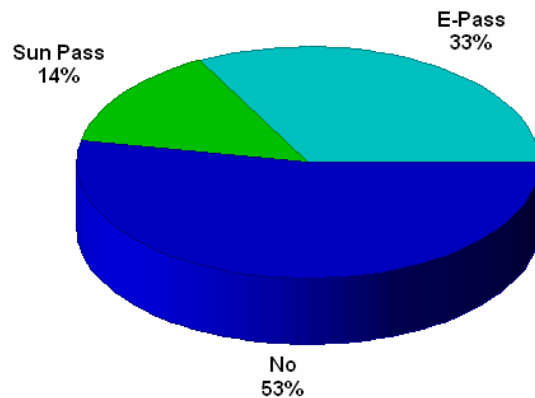
Electronic Toll Systems

This study finds that the majority [96%] of respondents are familiar with non-stop electronic toll systems like those available in Florida. On the other hand, fully half [53%] of those who are aware do not use either E-Pass or SunPass.

18. Are you familiar with non-stop electronic toll systems like the E-Pass or SunPass?



Are you an E-Pass or SunPass user?



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Among the 96% of respondents who are familiar with non-stop electronic toll systems, 33% have an E-Pass transponder and 14% use SunPass. [Approximately six percent of respondents have both.] E-Pass usage is highest among Orange County respondents [44%] and lowest among those who live in Volusia County [21%]. SunPass usage is highest among participants from Osceola County [28%].⁸

Are you an E-Pass or SunPass User?

	Overall	County			
		Orange	Osceola	Seminole	Volusia
Have E-Pass	33%	44%	34%	38%	21%
Have SunPass	14%	16%	28%	16%	10%
Have Neither	53%	51%	53%	53%	77%

Note: Multiple responses allowed

Base: Those familiar with nonstop electronic toll systems [question 18]

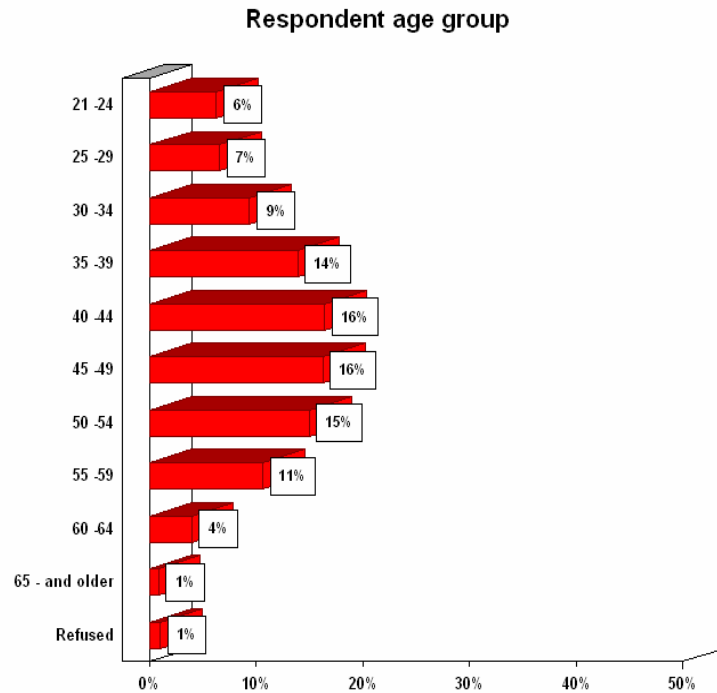
⁸ Question 19 is in the “Respondent Demographics” section. Question 20 was used to validate residency



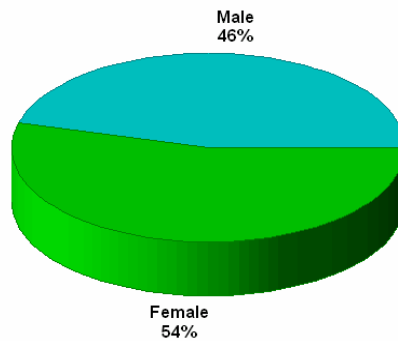
2004 I-4 Users and Potential Users Public Opinion Benchmark Study

Respondent Demographics

While there were no specific quotas set for any specific demographic segment, continuous monitoring took place to ensure a variety of age groups [derived from survey question 21] and balance gender [noted by interviewer] participation. As seen, the majority of respondents were age 40-54 and an approximate equal number were male and female.



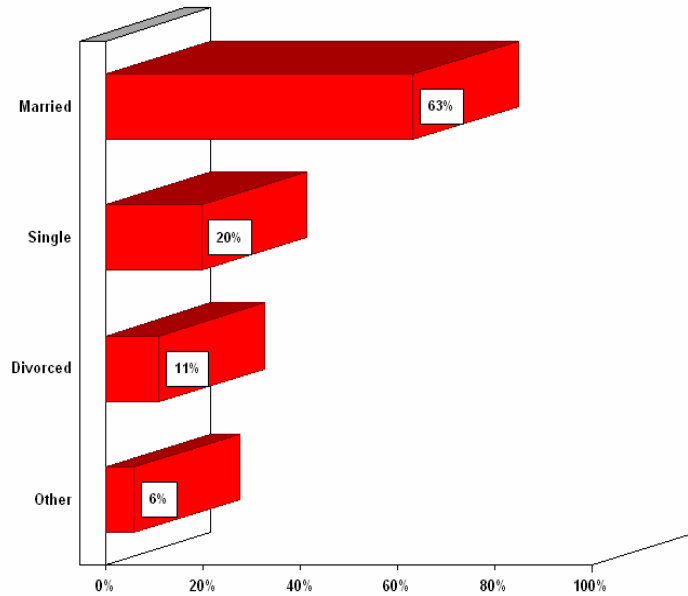
Respondent gender group



2004 I-4 Users and Potential Users Public Opinion Benchmark Study

As might be expected, most respondents were married and the distribution of household income varied. Based on the screening criteria, it is understandable that the majority [89%] of respondents are employed full time, the remaining part-time [question 19].

22. Marital status....



23. 2003 Household income

