

Tampa Bay Express Lanes

QUALITATIVE RESEARCH

NOVEMBER 2013

Research Purpose



Purpose

The primary purpose of the research was to determine commuter reactions to the Express Lanes concept, and to explore what questions they had regarding its usage and function. Areas examined included attitudes toward usage, expected behavior, and benefits/issues with the lanes across the proposed system. The discussion ended with respondents sharing ideas for developing a marketing tagline for TBX.

Recruiting Summary



Focus group participants were recruited and screened according to certain characteristics. They were classified as single occupant vehicle drivers, transit, and carpoolers living in Hillsborough or Pinellas counties. Participants were chosen by residency within a certain 35-mile radius from the proposed I-275 express lanes. Screened participants were then placed in one of four groups based on their driving commute.

There were a total of 8 to 10 participants recruited for each focus group session: The groups were comprised of single occupant vehicles (SOV), transit, and carpoolers.

Four focus group sessions were conducted over two days. The first day with three groups of Hillsborough commuters and the next day with one group of Pinellas commuters. A professional moderator led the discussion and asked participants to review existing commuter collateral and project descriptions. Each focus group session lasted approximately 90 minutes. A total of 30 respondents were interviewed. Most were single occupant drivers. One group was solely carpoolers. Other key demographics of the group included:

- Ages 25-60 for all groups; must speak English
- Group of mixed Commuter Types, SOV, Transit, Carpool
- Mix of men/women
- Ethnic representation fitting regional area
- All must travel on the corridor at least once per month
- Household Income of \$37K+
- 90% of the recruits must be currently employed
- High school graduate or higher

Caveat Summary



Caveat

The following summary of focus group discussions is qualitative in nature, and the shopper feedback is the interpretation of the researchers. While it is hoped that the participants expressed views that were representative of the population from which we seek answers, and to whom we wish to appeal, the results of this study should not be considered projectable.

No statistical inferences should be drawn from qualitative data.

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Key Insights Summary

1. Many participants were initially open to meaningful solutions to alleviate traffic congestion, though nearly all worried about the impact that constructing the new lanes would have on already heavy construction in the region. Most resistant to the lanes were carpoolers, largely due to the expected cost to use the lanes. Often participants compared toll lanes to others in south Florida or to those in the Tampa region. The most negative commentary was generated when commuters discussed experiences using other toll lanes like Crosstown Expressway. For example: “empty lanes”, escalating toll prices, difficulty navigating the access/exit points, and too many toll roads in close proximity in the region. In order of interest, the most intrigued by the Express Lanes were single occupant drivers then carpoolers. We did not interview enough transit users to draw a conclusive opinion.
2. Once participants were exposed to expressed lanes via the handouts, their perspectives generally changed for the better. Everyone we spoke to had a better understanding and perception of the expressed lanes after discussing and reviewing the handouts, including a map of the proposed system. The handouts answered many questions and provided enough information for the respondents to make a more informed decision about what the express lanes are, and how they might fit into the community. Many questions were not answered by the handouts, such as benefits of the new TBX system and pricing structures.

Key Insights Summary

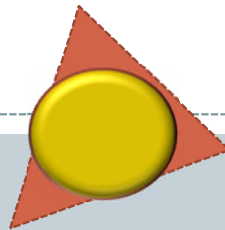
3. Respondents expressed a need for intensive early program outreach and education. Most respondents concerns were in the following areas: **Access points, who can use the lanes, how to get a transponder, who will need a transponder, how the lanes will work, hours of operation, signage, how the lanes differ from other toll lanes, data, business cases, success stories, and pricing.**
4. Many respondents wanted to know how construction would impact current traffic.
5. Respondents mostly liked the idea of developing branding for the TBX Express Lanes. Several taglines were suggested to the focus groups. The most recommendations received from the participants were those with the word “forward.” In essence, respondents liked tag lines that describe the benefits, speaking directly to driving on toll roads, and giving them the feeling of movement/progress.
6. Respondents were not clear if HOV is a component of the Express Lanes. They needed clarity regarding occupancy requirements, special carpool benefits, and who would need a SunPass to use the lanes. Many specific questions arose with regards to transit applications. Particular discussions were had regarding the perception that buses using the lane might slow it down and hence lessen the lanes true intent to alleviate congestion and create more predictable trip times.

Lingering Questions

PARTICIPANTS HAD QUESTIONS AFTER BEING EXPOSED TO THE EXPRESS LANES	
Safety	<ol style="list-style-type: none"> 1. If there is an accident, then what? 2. How will you determine where access and exits points are located? 3. Will you have to cross several lanes of traffic to get on and off? 4. How much time do you have to enter the lane after seeing a sign for it? 5. Will the traffic be too fast. Will it be enforced? What is the speed limit on the lane?
Occupancy	<ol style="list-style-type: none"> 1. Do carpoolers ride the lane free? 2. Are they going to have car pool lanes too? 3. What is the occupancy eligibility? 4. Why not just make the lanes all carpool lanes without a toll? 5. How will they know I am carpooling?
Access Points	<ol style="list-style-type: none"> 1. Are the access points going to be congested? 2. Will access points negatively impact the current flow of traffic? 3. How do I exit the lane in heavy congestion? 4. How do you exit Express Lanes? How far apart will the entrances and exits be? 5. Will it be a true express lanes with few entries and exits?
Construction	<ol style="list-style-type: none"> 1. Are they building new lanes in addition to the existing lanes? 2. How is it going to impact existing traffic when building the lanes? 3. How is this funded? Where do the funds go after being generated? 4. Is this a definite? 5. Will this toll benefit the county to pay for other road projects?
Other	<ol style="list-style-type: none"> 1. Has there been any data collected showing increased traffic flow? 2. What are the transit options? Why not just build mass transit? 3. Why not all carpool lanes instead? 4. Have you done a pilot study? 5. How will the lanes be enforced? 6. Will there be fee forgiveness until we get used to this new system?

Lingering Questions

PARTICIPANTS HAD QUESTIONS AFTER BEING EXPOSED TO THE EXPRESS LANES	
Access / Transponder	<ol style="list-style-type: none"> 1. Is this similar to other Florida toll roads like Veteran's Parkway? 2. Where would you get the SunPass? Does everyone need one? 3. Do I have to buy some special equipment for the car to use the device? 4. Does the SunPass cost money?
Pricing	<ol style="list-style-type: none"> 1. What will it cost? 2. How much per use/trip? 3. How do you actually know how much you will pay for the trip? 4. Is there a limit to how much the tolls will increase to? 5. What are the fines for illegal use? 6. Do fees max out? 7. If price goes up as more people use it, how will it help overall traffic flow? 8. How does the customer pay? 9. Will it be higher if more traffic or lower if no traffic? 10. How will it receive and register payment? 11. Is there a toll during off/non-peak times? 12. Is the proposed toll similar to the southern Florida tolls with booths? 13. Is this state or city revenue being generated? 14. What is the "real" savings in gas, time etc.
Functionality	<ol style="list-style-type: none"> 1. Does this really work? 2. Where did the idea come from? 3. Will this take away from current lanes? 4. How would this proposal differ from southern Florida toll roads? 5. How far north will the lanes go in Pinellas? 6. Is this just an idea or an actual plan? 7. One toll road can fix the congestion problem? Not likely.



Corridor Analysis

LEARNINGS FOR THE TARGET COMMUNITY

Initial Reactions Express Toll Lanes: Positive



**FLEXIBLE
ALTERNATIVE
CHOICE
OPTIONS
CONTROL
SPEED/FAST/QUICK
TIME SAVINGS
MOVEMENT
ALLEVIATES TRAFFIC
OPEN
FASTER TRANSIT
NICE WHEN HURRIED
CAN MAINTAIN SPEED**

**CONGESTION HELP
RELIEF
ECONOMY BOOST
JOB CREATION
STATE REVENUE
CREATES CAPACITY
BETTER COMMUTE
INCREASED FLOW
FEWER ACCIDENTS**

Initial Reactions Express Toll Lanes: Negative



**LIMITING
REVENUE GRAB
INEFFECTIVE
ADDS CONGESTION
MORE FINES
MORE VIOLATORS
PROFIT PUBLIC ROAD
REPLACES RAIL OPTIONS
NOT FOR BUDGETERS
PAY FOR CONVENIENCE
EMPTY/UNUSED
ANOTHER COST
UNWANTED
WHY NOT JUST HOV?
MORE CONSTRUCTION
ANOTHER TOLL
NO PINELLAS BOOST
PAY TO RIDE**

**MORE ACCIDENTS
UNFAIR
SMALL/LIMITING
TOO EXPENSIVE
CROWDED
NOT A FIX
CRAZY CONCEPT
NOT A SOLUTION
MAKES NO SENSE
NO PRICE CAP
DRISTRACTING
UNSAFE
UNJUSTIFIED
FOR THE RICH
TOO LONG BUILD
A NEW TAX
LACKING PINELLAS
TEMPORARY FIX**

Common Agreement Across Groups

- What is it like driving on I-275 today?

Memorable Quotes:

“The interstates just don’t seem well planned or thought through. Lanes are added and taken away almost without justification. It feels like no real thinking is going into our growth. They need to fix the problem once and for all and all at once.”

1. Adjust work hours just to avoid driving on it during rush hours.
2. Downtown Interstate (DTI) is the worst.
3. HFB to Bearss is really bad.
4. Crosstown Connector may help.
5. Changing exits from right to left causes backups.
6. Need more lanes on I-275.
7. The left exit at Armenia causing real problems.

Common Agreement Across Corridors

- What are your reactions to the Express Lane description?

It is no secret that Tampa Bay is experiencing increasing congestion and the Florida Department of Transportation has been studying express toll lanes strategies to improve mobility from both quality of life and movement of goods and services perspectives.

Now, we've developed a faster, reliable, and cost-effective approach for the Tampa Bay region that expedites increased capacity, offers choice, and supports transit and economic development. The Tampa Bay Express is a new way to reduce commuting times and get drivers out of backed up traffic.

It is being built next to existing lanes of the interstate and drivers get to **choose** whether to pay a toll for a faster more reliable trip. The purpose of express lanes is to manage congestion and to provide a new choice for drivers.

Memorable Quotes:

"I would have to see it work to believe it."

"I would try it."

"It could work if it is well executed. The proof will be in the execution. I am slightly optimistic. Tampa construction has become a constant. It seems to never end. This could become part of that never ending reality."

1. Adding one toll lane cannot fix traffic.
2. Why charge people to drive faster?
3. Why not covert lanes to express lanes not add new lanes?
4. Is this new capacity or restriping?
5. Will it allow for expansion?
6. Does it pay for itself then become free?
7. Is it one way or two ways?
8. Sounds like dynamic pricing.
9. Will the tolls pay for the construction?
10. Shorter commute times across counties.
11. Saying goods services says SLOW not FAST.
12. Not sure how transit fits into express lanes?
13. Flat rate? Monthly passes?
14. Lacking in detail, especially benefits.
15. Why not light rail instead?
16. Good if it helps.
17. Faster travel.
18. More commute options
19. Needs to alleviate congestion not manage it.

Common Agreement Across Corridors

- What are the top disadvantages of the Express Lanes?

Memorable Quotes:

“It doesn’t work, it cannot work.”
“Not sure if it is going to be accepted.”
“No one said what the cost is.”
“People will not buy into it.”
“Everything has a cost.”
“I will take it when my company is reimbursing for travel.”
“All around confusion”
“Too many unanswered questions to count.”

1. Too expensive.
2. More accidents as a result.
3. Too confusing.
4. Buses will cause congestion.
5. More traffic congestion in “free lanes”.
6. Access points too limited.
7. More construction during building.
8. For the rich / not fair to all.
9. Everyone pays but not everyone benefits.
10. Not enough in it for Pinellas.

Commuter Voice

- Once they were exposed to TBX via the collateral for many their perceptions of express lanes improved. For most the collateral felt incomplete in key information.
- Though the collateral answered some questions it ignited several unanswered questions that affect respondents interest and expectations about TBX as a system and solution affecting Tampa traffic congestion.

Memorable Quotes:

“The promotion piece is good enough to get your attention but it lacks so many details. Most important what are the benefits for drivers specifically. What is this system doing differently than now. What is the promise being made?”

Hillsborough

1. What are the benefits to me?
2. What are the times savings?
3. How does the electronic toll collection work? Is there a toll calculator?
4. What is meant by “could be built?” Is it or isn’t it?
5. Buses can’t go 65 MPH. Why are buses allowed then?

Pinellas

1. Maps are helpful, better if just one combined map.
2. High gloss paper not needed.
3. Is this master plan or a start of something?
4. What if there is an accident? Then what?
5. Where does the money collected go?
6. Are public or private monies funding the build out?
7. Where are the on and off points? Need to see that.
8. Will there still be room for emergency lanes?
9. If there is enough room to build new lanes why toll them?

Common Agreement Across Corridors

- What are the time savings benefits of TBX?



Hillsborough

- Most respondents felt that TBX would definitely create a time savings for them and their commute if the lanes worked as described. Many cited between 10-30 minute perceived time savings one way when using the lanes.
- The biggest time savings seems to be expected on the green/purple route including I275. A few perceived a 30 minutes time savings on I4.

Pinellas

- Most respondents felt that TBX would definitely create a time savings for them and their commute from St. Pete to Tampa. The estimated time savings 15-20 minutes. A few respondents mentioned savings of 25-30 minutes from St. Pete to I275 and 20 minute savings from I375 to I75.

Memorable Quotes:

- “Great when going to Tampa Airport.”
- “It could work. Not sure why more of Pinellas not included. Why these corridors?”

Commuter Voice

- Some respondents were unclear if HOV is a component of the Express Lanes. They wanted to know what occupancy requirements apply and what benefits would apply for driving as a carpooler in the express lanes.

Memorable Quotes:

“They are converting lanes. Why no new lanes?”

“Are all the lanes non HOV?”

“Toll roads and HOV don’t really get used.”

Memorable Quotes:

“Why not just add all HOV lane instead of this?”

“Do carpoolers ride free?”

1. Do carpoolers in cars ride the lane free?
2. Are they going to have car pool lanes too?
3. What is the occupancy eligibility?
4. Why not just make the lanes all carpool lanes without a toll?
5. How will they know I am carpooling?
6. Will carpoolers need a SunPass?

Commuter Voice

- Most respondents wanted detail on the construction impact on current traffic.

Memorable Quotes:

*“What is the plan for minimizing delays from construction?”
“How long will construction last?”*

Memorable Quotes:

“Here we go again.”

1. Are they building a new lanes in addition to the existing lanes?
2. How is it going to impact existing traffic when building the lanes?
3. Is this a definite?
4. Will this toll benefit the county to pay for other road projects?
5. When construction is complete will the toll remain?
6. Are they going to figure out the left vs right exits points and stick to them?
7. Is the building of these roads going to happen all at once?

TBX Tag Lines

- Respondents liked the branding Tampa Bay Express.
- The taglines that respondents came up with largely speak to a direct benefit, speak to driving on toll roads, and many communicate the regional aspect of the lanes.
- The most prevalent taglines trigger movement literally or figuratively.



Pinellas

Fast, furious, fun
Orbit the Florida Sun
Express Yourself
Get their faster & smarter
The way to arrive there
The speed of SunPass
Express yourself by saving time

Moving at the speed of time
Fee to be free
Pay to go
Get there now
Faster & friendlier
Faster than the speed of sound
The reliable option
Stress less, Express

Hillsborough

Get home faster to loved ones
You will be impressed
Money well spent
Where driving is a pleasure
Getting you there
Come drive with us
Getting you there easily and faster
Helping Tampa Bay grow
Moving at faster speeds
Making Tampa Bay a nicer place
Getting you there faster
Moving forward
The straight shot lane
Keep it moving

Where less is more
Keep Tampa Bay moving
Moving Faster on the Express
Time is Money
Express with Tampa
Move with Tampa Bay
Tampa on the Go
Fast Forward
Moving and Grooving
Life in the easy lane
Faster
Exclusive luxury for you
Cut time out of your day
Gets you there faster
Faster, safer way to travel

**Moderator suggests further discussion on these taglines*

TBX Tag Lines We Introduced

- The most liked taglines, among those we introduced and asked for reactions to, expressed movement.

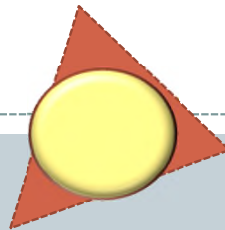
Most Liked

Get There Faster
Don't Stress Express
Let's Move
Keep It Moving

Least Liked

It's About Time
Live Life





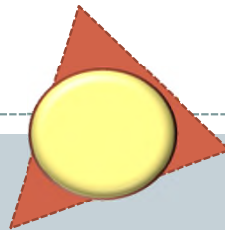
Recommendation / Strategies

SHORT TERM

Recommendations



1. EDUCATE, EDUCATE, EDUCATE about toll users, transponders, lane functions, benefits, and pricing.
2. Continue to educate via grassroots/community methods. Use a variety of different venues and media outlets to educate the community. Use social media.
3. Host more community gatherings to continue dialogue and build support.
4. Illustrate how the project is different from existing express lane projects in the state and country.
5. Develop a marketing strategy specific to each target group so commuter types know the benefits.
6. Identify public champions from each corridor region that support managed lanes, and educate others about the benefits of managed lane concept.
7. Develop an identity and language that allows communities to take ownership and pride. Example: TBX-Pinellas.
8. Develop a strong benefit orientated message strategy using traditional and non-traditional methods.
9. Conduct deep live working sessions to arrive at a credible tag line that is emotional, relevant, credible, lasting.
10. There needs to be a greater tie-in between benefits of the express lanes and cost. The value proposition must be tailored for each target audience.
11. Ensure that the branding and messaging evoke positive and uplifting responses from the community, and makes TBX ownable for them.
12. Demonstrate that the 'everyday person' can use the express lanes daily and how it can work for them and their needs.
13. Illustrate through the use of data the need for express lanes.



Recommendation / Strategies

LONGER TERM
THE WAY FORWARD

TBX Opportunities



- ❖ **Ad Campaign: Make consumers feel more empowered via product choice.**
 - Address how TBX translates into making an easier commute. Begin with a feel good campaign.
 - Benefits: Time management, less stress, quality of life, new choices, peace of mind.
- ❖ **Price: Benefits must outweigh the cost.**
 - Show value for their money. Allow for clear understanding how the pricing is right for them (simple, straight-forward, no tricks or small print). Show them how the benefits can be maximized.
- ❖ **Promotion: Communicate in a meaningful, relevant way – be direct and show value**
 - Ads should use several visual images (young, old, lifestyle stages) to show how inclusive Express Lanes meet individual needs
- ❖ **Placement: Be available in their community.**
 - Leverage the internet (social networks) to build buzz.
 - Make sure customer service agents are knowledgeable, flexible and empowered to resolve problems the first time via superb customer service.

TBX Opportunities



- ❖ **Balance media efforts with community outreach.** This approach lends credibility and shows FDOT's commitment to building lasting relationships with target audiences (especially important for skeptics). Become a true advocate, showing that “we are in this together.”
- ❖ **Look for ways to reward desired behaviors,** such as discounts for long term usage.
- ❖ **Product: Make consumers feel more empowered via product choice.**
 - Address how the express lanes fit into making life easier (i.e. Time management, less stress, quality of life, access to choices, peace of mind).
- ❖ **Look for innovative distribution channels that create value for TBX and help to mitigate its “premium” price perceptions among skeptic audiences.** (Examples include grocery outlets, AAA, DMV, gas stations etc.)
- ❖ **Consider a local celebrity endorsement which lends credibility to the brand experience.** A great national example of a brand who has done this effectively is ALLSTATE with the endorsement of Dennis Haysbert.
- ❖ **Leverage consumers’ social networks “word of mouth; twitter, Facebook”** trusted relationships as key endorsers and advocates.

TBX Opportunities- Messaging



- ❖ **Speak to and design a product for life enrichment and life value benefits.**
- ❖ **Lead with a simple and easily communicated value proposition.**
- ❖ **Identify the key emotional triggers and use imagery that leverages these emotions.** Allow the express lanes product to be the backdrop of the communication. Tap into the “why” behind the product and then allow the consumer to self complete what it means to them. Let them draw their own “product impact” conclusion.
- ❖ **Tone is key – Honest, straight talk.** Speak to them with relevancy and authenticity in all communication matters. Do not use scare tactics. They do not want to be “scared into use” but rather drawn by innovation and practicality.
- ❖ **Look for a connection with the target based on what they aspire to or want for in life and the lives of their family.** Life management as a means of leading to a better quality of life, productivity and happiness, peace of mind.
- ❖ **Dare to be different.** Hook the target group by doing the unexpected!

TBX Opportunities- Connecting the Consumer



❖ **Make that relevant connection by:**

- Demonstrating that TBX are worth the value and worth considering in terms of ease of use, cost and function/application (core values).
- Use strong cultural images to show consumer targets as part of a diverse world with various needs.
- Be authentic – Reach out and connect with consumers pragmatically in terms of how TBX are an important life management service that enhances their life (not over promising) / realistic as a primary message and emotional as a secondary.
- Offer excellent customer service.
- Go beyond product description and create a connection. Communicate how that product will enhance their day to day lives.
- Provide choices-ALWAYS
- Do not dictate to consumers – share useful information;
- Show up in their neighborhoods while having a community presence - be approachable.