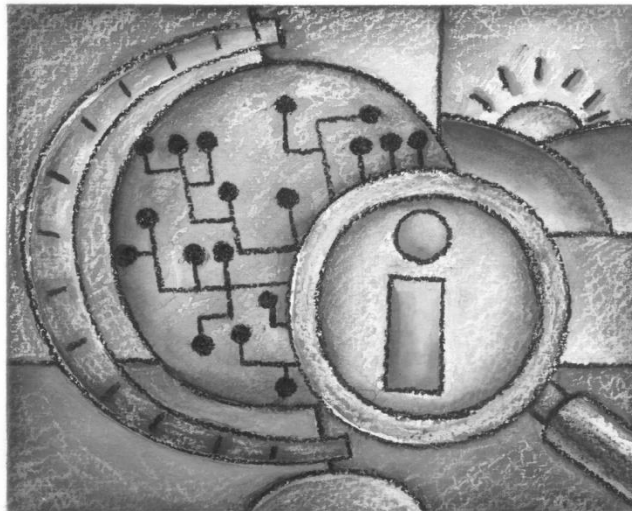


Fast Lanes Study
Phase III
Telephone Survey Results



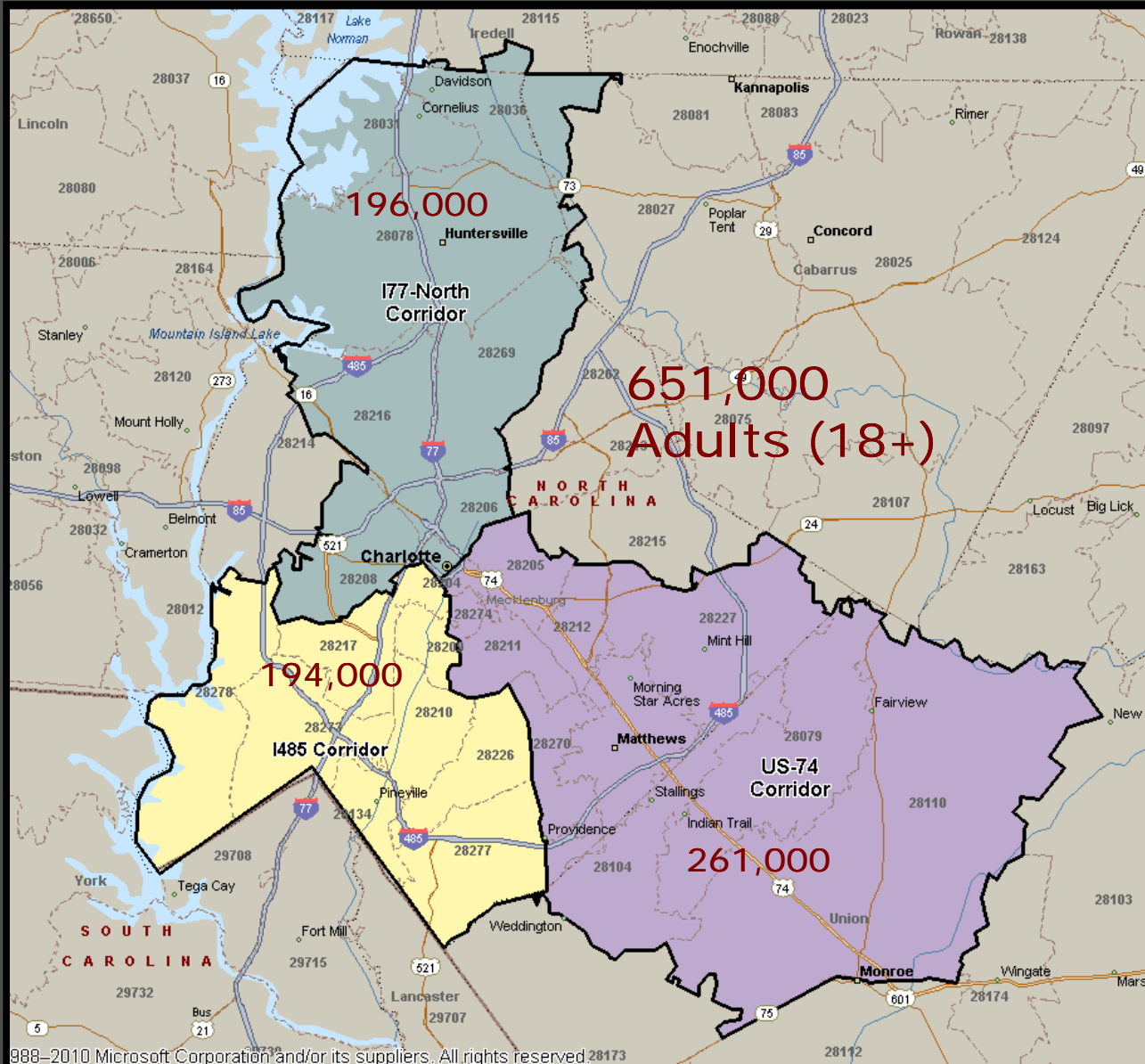
**PARSONS
BRINCKERHOFF**

Methodology

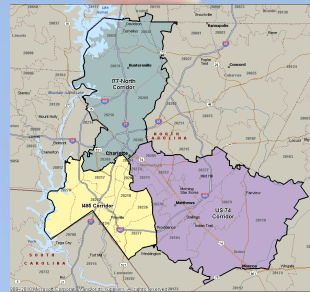


Methodology

- Areas in Mecklenburg & Union Counties defined by ZIP Code, surrounding each of 3 corridors
- However, all respondents were asked about their use of any of the three corridors.



Sample vs. Corridors



Purpose of this survey - estimate how the larger population of 651,000 adults in the area would respond if we surveyed them all

Methodology

- 911 Telephone interviews
 - April 18 to May 2, 2012
 - 300+ Interviews in each corridor area
- Landline RDD (n=317), Landline Targeted (n=317) & RDD Wireless (n=277) Sampling
- A minimum of four attempts
- Leads to sample representing adults living in these three corridor areas

Methodology

Parental Decision-makers

- Race

- White-Caucasian
- Black-African-American
- Asian
- Other

- Age

- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65+

Census vs. Sample

*Survey Area

Unweighted Interviews

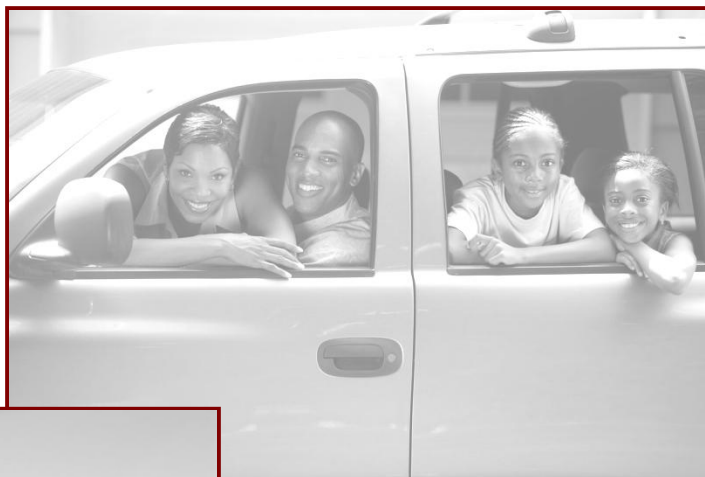
62%	66%
25%	23%
4%	3%
9%	8%
11%	6%
22%	16%
22%	22%
19%	26%
14%	14%
12%	16%

*Based on 2010 U.S. Census

Methodology

- Data weighted by # adults in household, ZIP code, area, sex, age, ethnicity, race & landline vs. wireless phone use
 - Based on U.S. Census data and NHIS
 - Ensures any group is represented based on its actual proportion of the population
- Maximum Sampling Error for overall findings is plus-or-minus 3.3% at a 95% level of confidence

Travel
in the

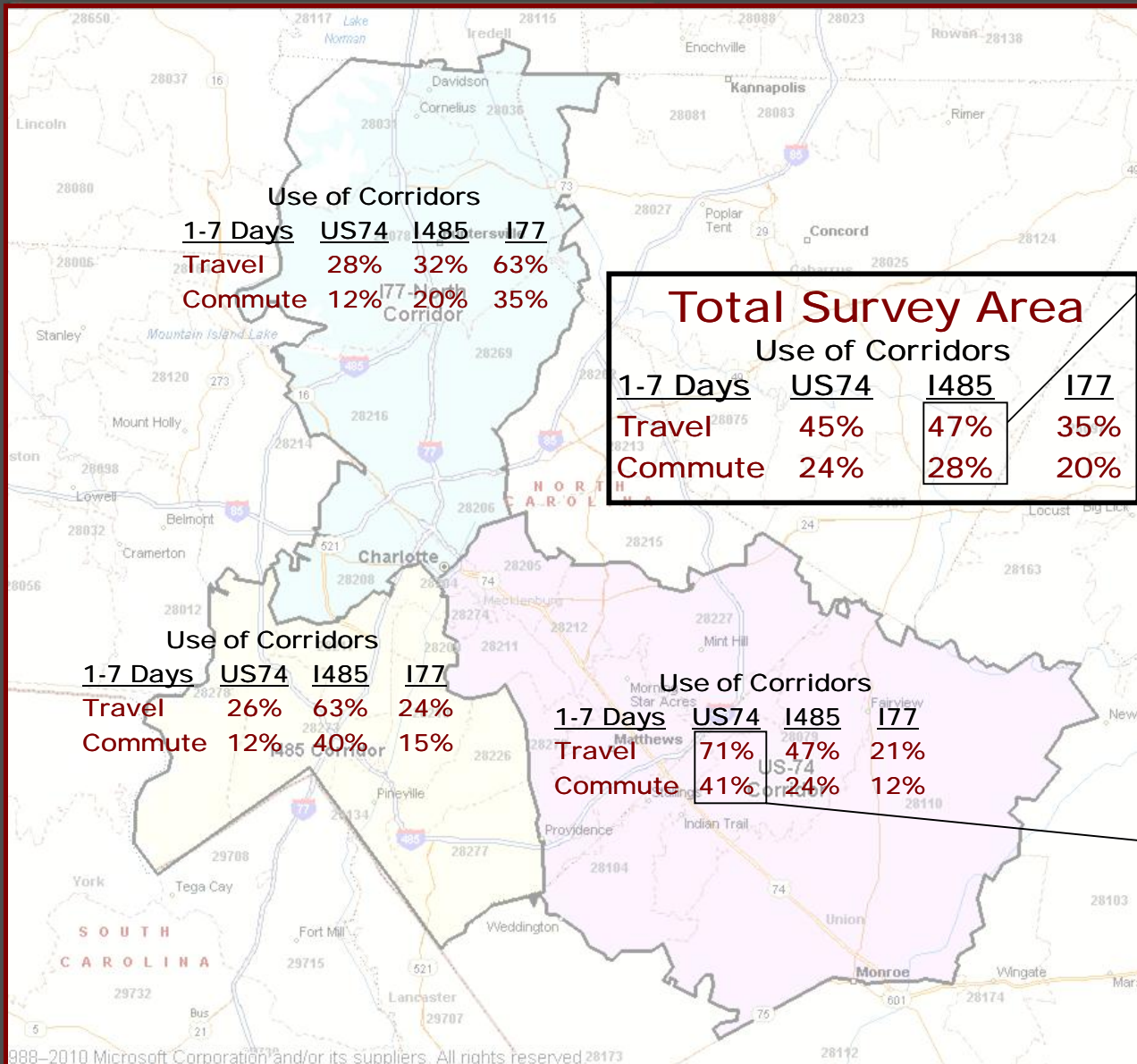


Three
Corridors

Traveling and Commuting

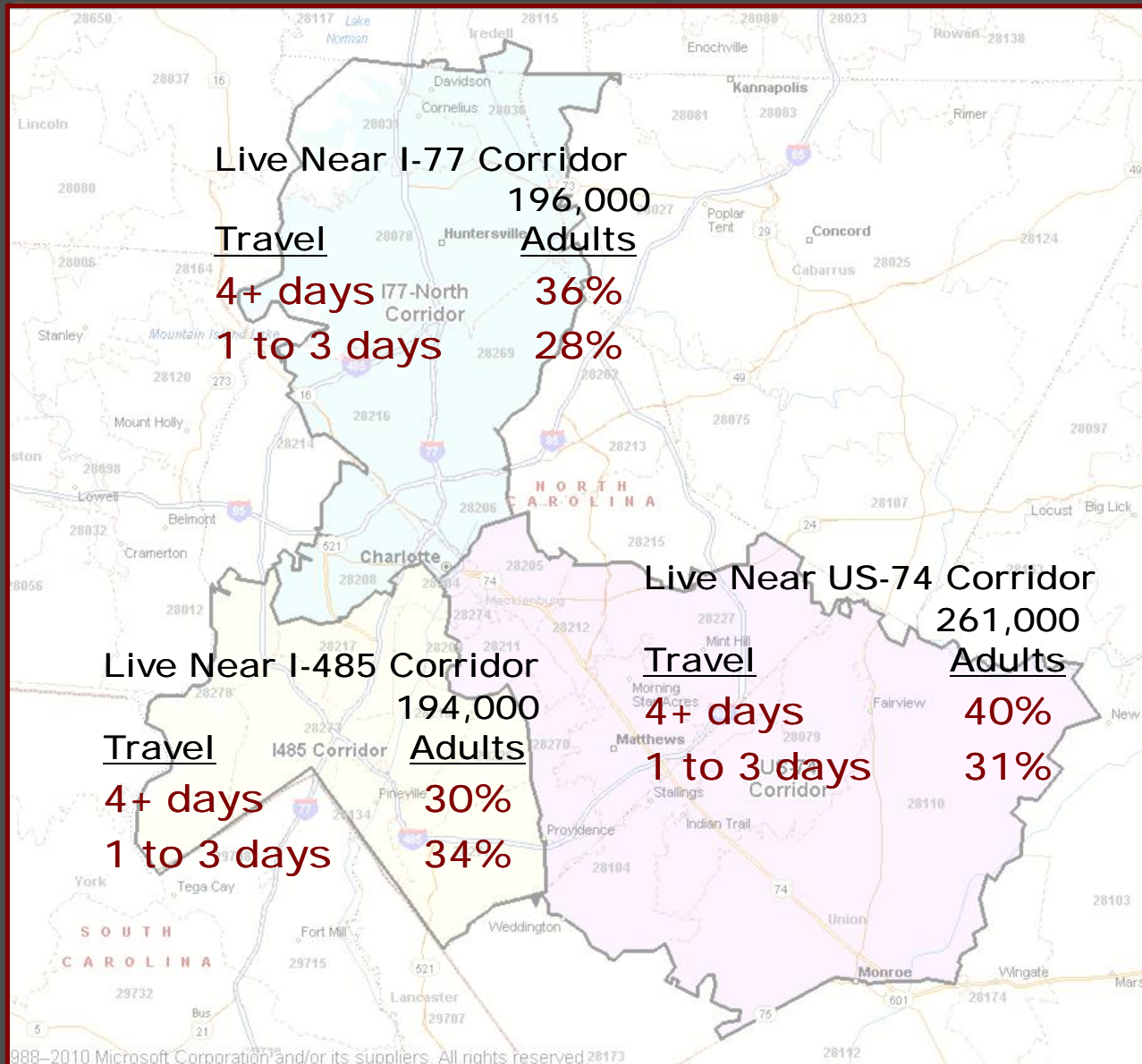
Interpretative Examples:

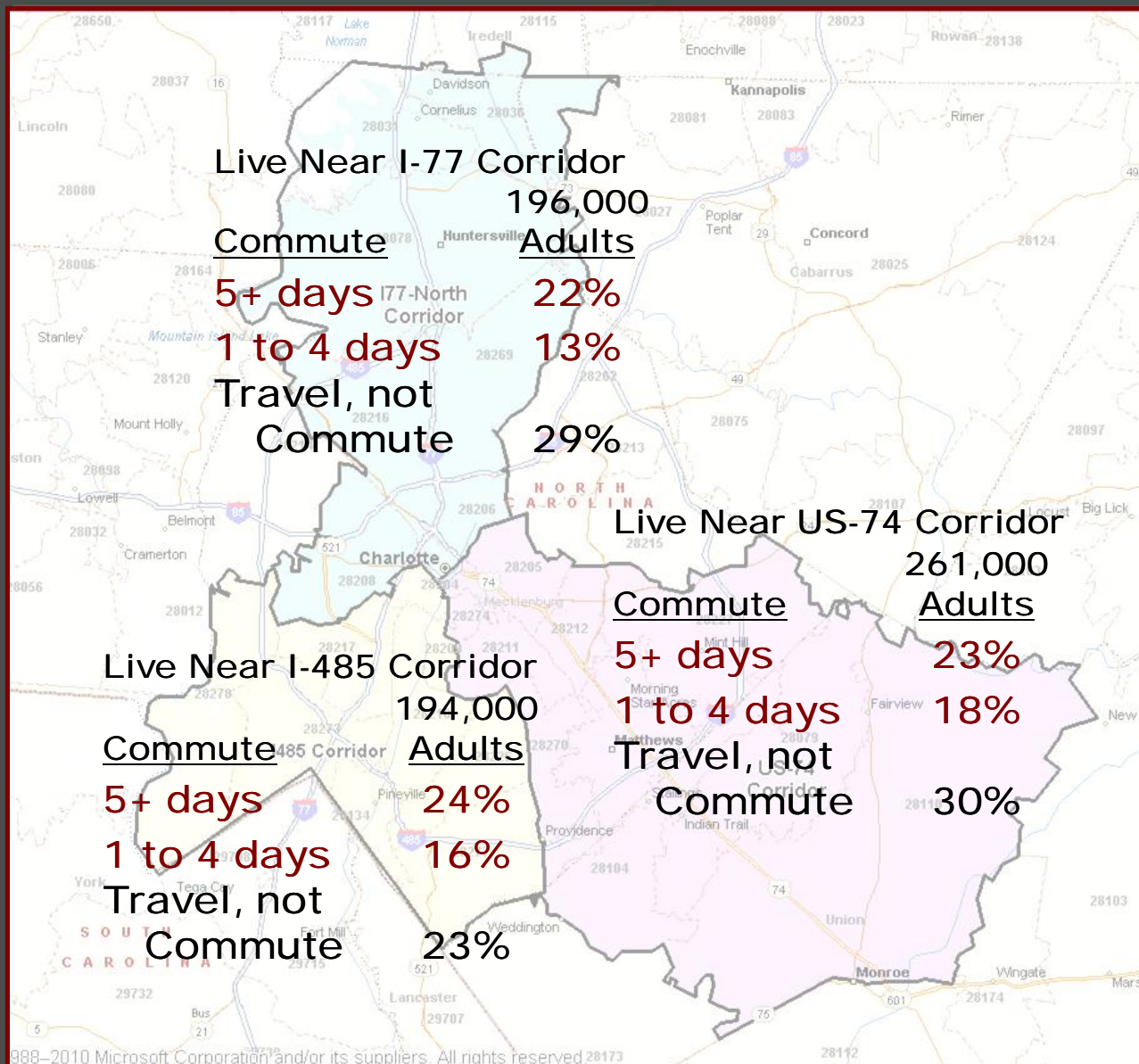
- **47%** of the adults living in the **total survey area** typically travel at least 1 day/ week on the section of I-485 between US-74 and I-77; **28%** commute at least 1 day/ week on this corridor.
- **71%** of the adults living in the **survey area around US-74** travel at least 1 day/ week on the section of I-74 between I-485 and I-277; **41%** commute at least 1 day/ week on this corridor.



Traveling

- A minority of adults who living near each corridor frequently travel on that corridor.
- Depending on the corridor, three to four of every ten adults typically travel four or more days a week on the corridor near their home.





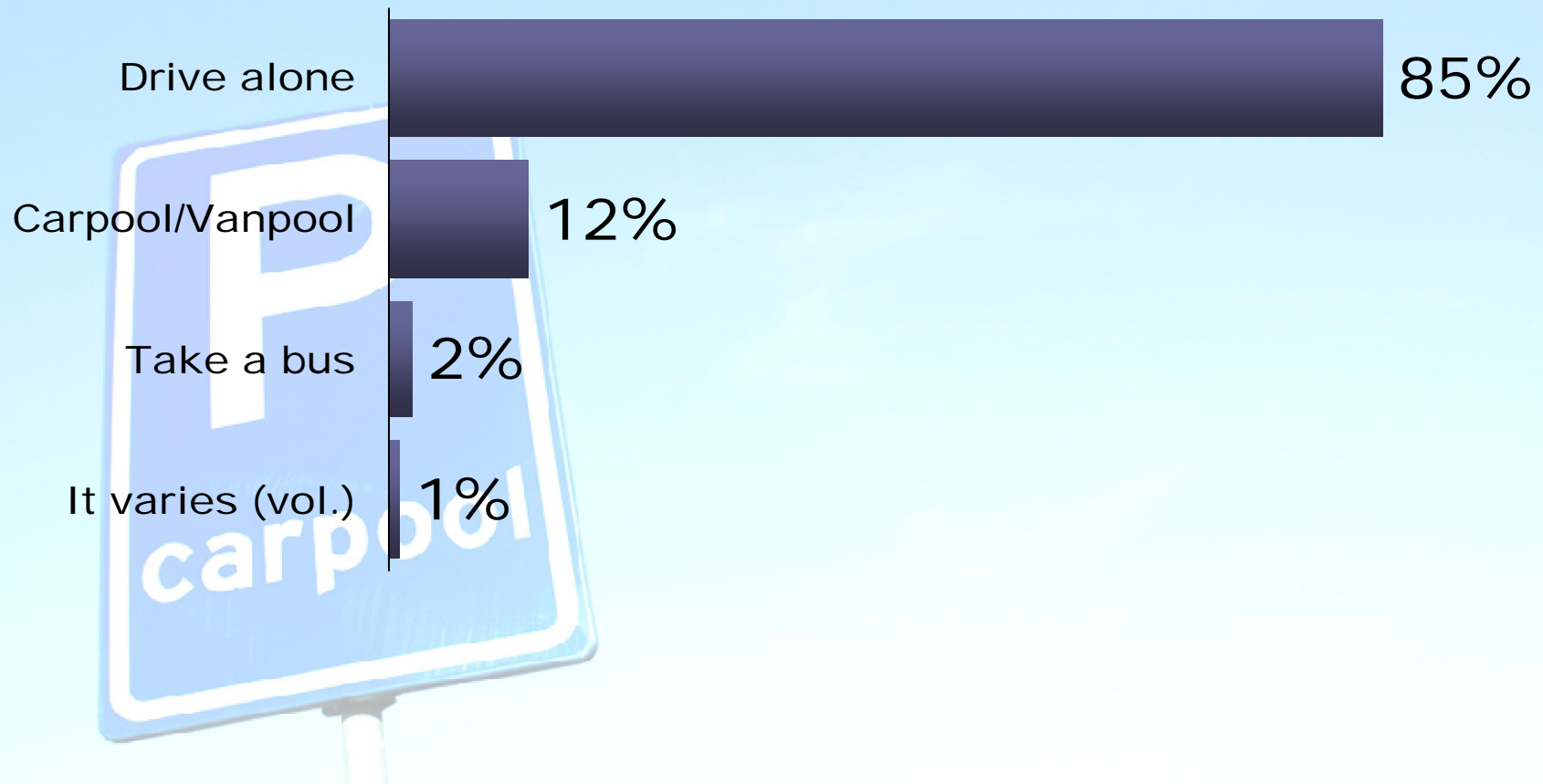
Commuting

- A minority of adults who live near each corridor commute 5+ days a week on that corridor.
- Depending on the corridor, approximately one of every four adults commute 5+ days a week on the corridor near their home.

Commuters

Transportation Currently Use

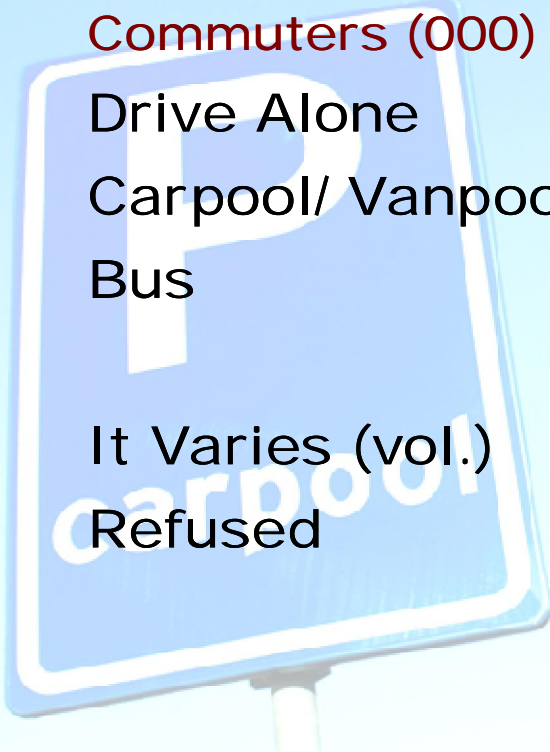
“Currently, when you travel to work or school, do you typically . . . ?”



Commuters

Transportation Currently Use

“Currently, when you travel to work or school, do you typically . . . ?”



	Commuters		
	US-74	I-485	I-77
Commuters (000)	<u>154.7</u>	<u>180.7</u>	<u>127.3</u>
Drive Alone	86%	84%	79%
Carpool/ Vanpool	9%	13%	16%
Bus	3%	1%	4%
It Varies (vol.)	2%	1%	-
Refused	-	<.5%	1%

Commuters

Travel Characteristics

While On Corridor Average Speed, Distance & Time

	US-74	I-485	I-77
Commuters (000):	<u>154.7</u>	<u>180.7</u>	<u>127.3</u>
Speed (mph)	21.9	31.7	33.8
Distance (miles)	7.2	11.5	12.6
<u>Est. Time Typically Spend</u>			
To Work/School (mins)	24.4	25.7	25.7
Returning Home (mins)	26.8	27.1	28.8

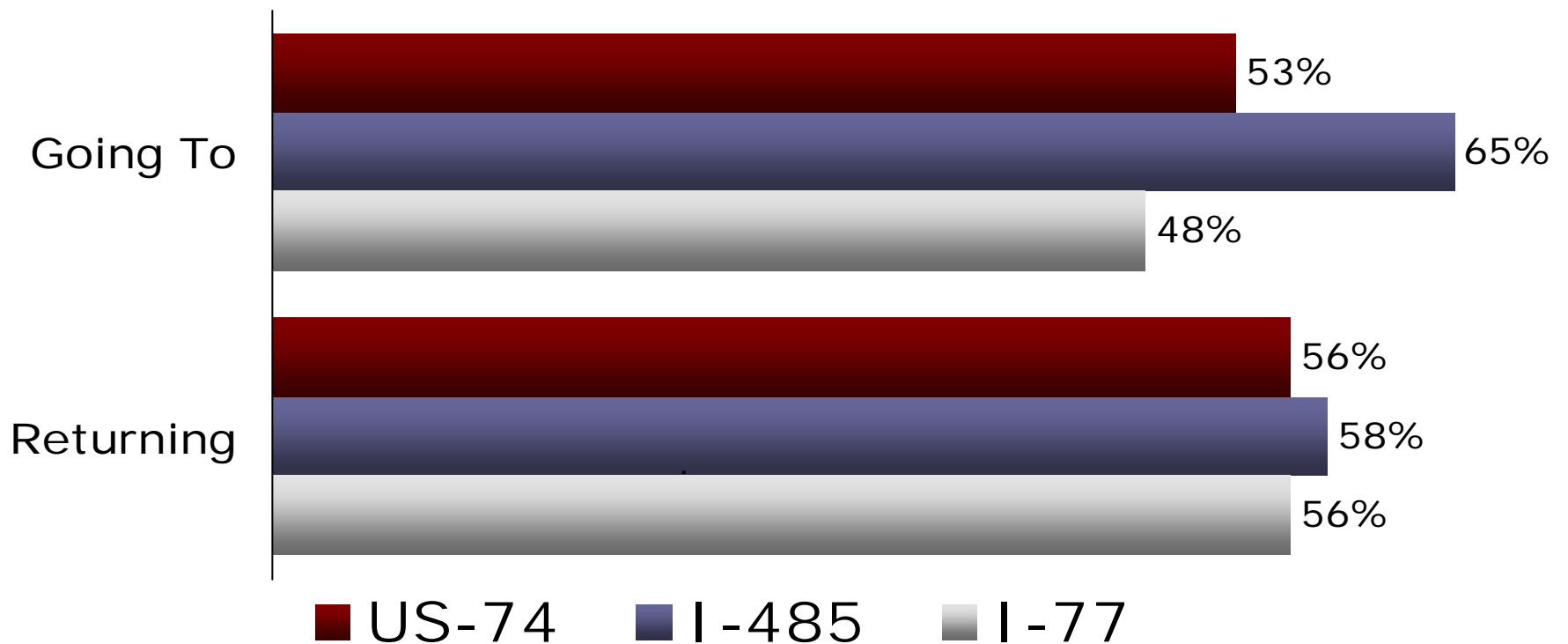
And when thinking about time . . .

Commuters

Consistency of Commuting Time

Time Spent Going to Work/School & Returning Home

Percent Who Said "Very Consistent" by Corridor

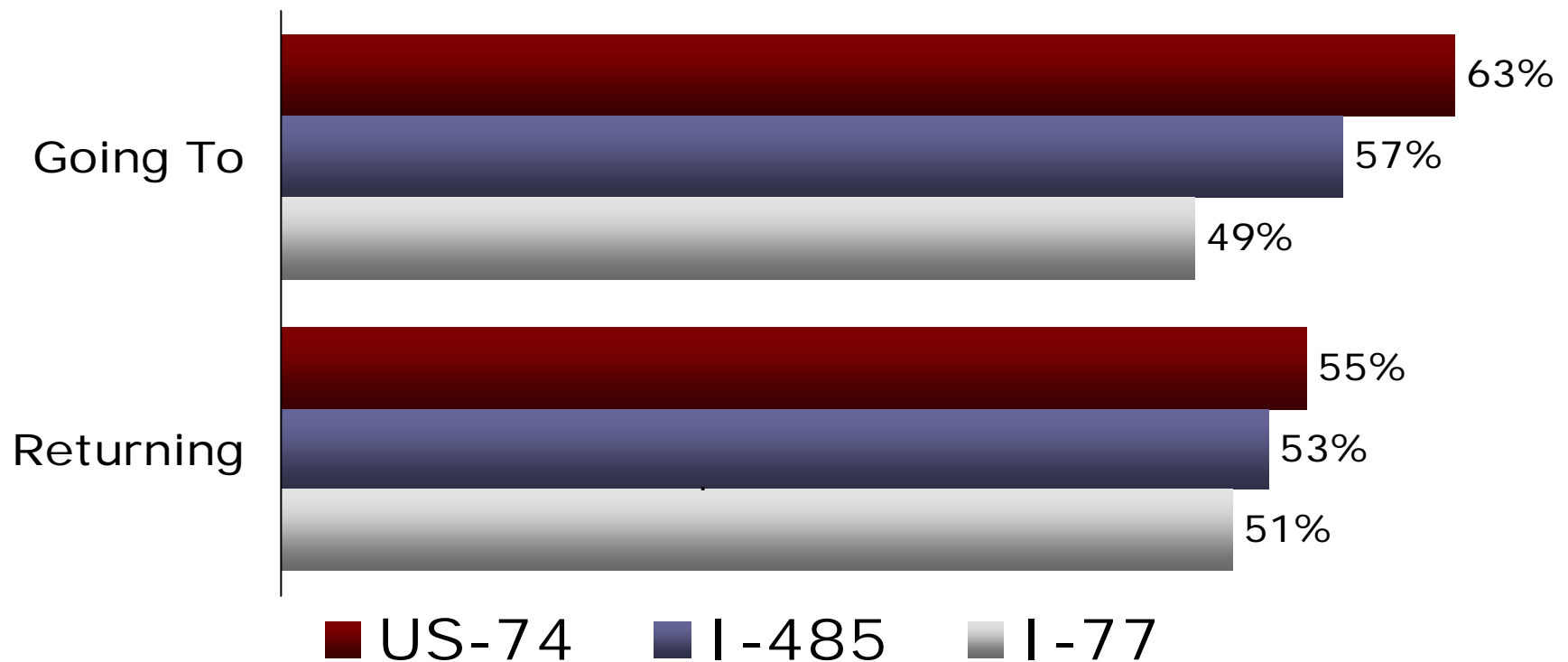


Commuters

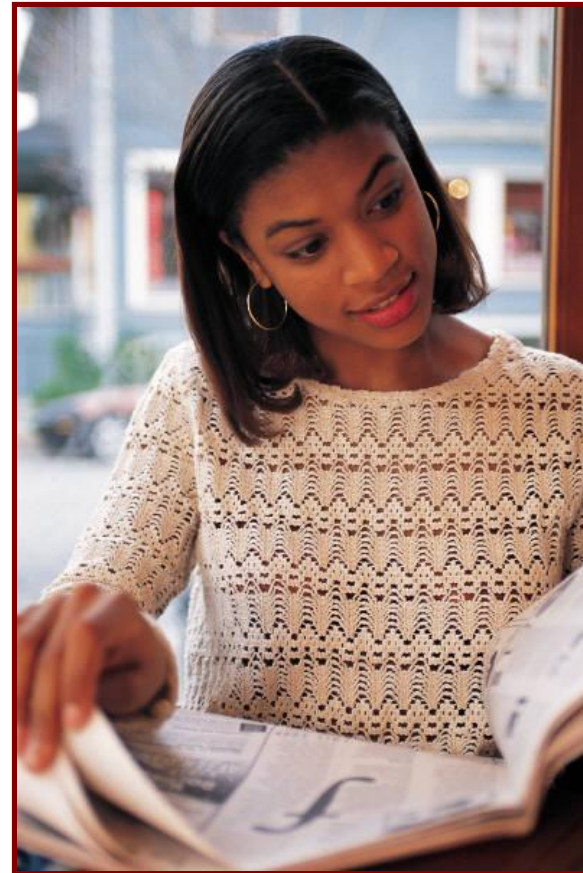
Perceived Congestion

Congestion When Going to Work/School?

Percent Who Said "Very Congested" by Corridor



Those Who Travel
on Corridor:
Heard of Changes
Being Considered?



Travelers

Changes to the Corridors

“Have you heard about any changes . . . being considered to the section of . . . ?”

Percent Who Said “Yes”

**US-74 between I-277
and I-485?**

44%

**I-485 between US-74
and I-77?**

32%

I-77 North of I-85?

23%

US-74

US-74 Travelers Who Heard of Changes (n=185) "What possible changes have you heard about?"

- | | |
|--------------------------------------|-----|
| • Widening road/ Adding more lanes | 35% |
| • Making it into a freeway | 30% |
| • Toll Lanes | 9% |
| • New Roads/ Bypasses/ Intersections | 5% |
| • Toll Road | 4% |
| • Businesses closing | 4% |
| • Rapid Transit | 3% |
| • Limited access | 3% |
| • Miscellaneous road work being done | 1% |
| • Don't Know | 12% |
| • Refused | 1% |

I-485

I-485 Travelers Who Heard of Changes (n=160) "What possible changes have you heard about?"

- | | |
|----------------------------|------|
| • Adding more lanes | 77% |
| • Toll Lanes | 11% |
| • Completing existing loop | 5% |
| • New ramps to be built | 4% |
| • Toll Road | 2% |
| • Don't Know | 8% |
| • Refused | <.5% |

I-77

I-77 Travelers Who Heard of Changes (n=97) "What possible changes have you heard about?"

- | | |
|--|-----|
| • Adding more lanes | 57% |
| • Toll Lanes | 16% |
| • HOV Lanes will become toll lanes | 9% |
| • Adding intersections/ more exits | 6% |
| • Toll Road | 4% |
| • Carpools will no longer drive HOV lanes for free | 3% |
| • Adding HOV/HOT lanes | 2% |
| • Rapid Transit | 2% |
| • Adding bridge | 1% |
| • HOV lanes will be eliminated | 1% |
| • Don't Know | 4% |

Attitudes Toward



Tolled Express Lanes

Tolled Express Lanes (TEL)

All Respondents (N=911) were read the following . . .

“I am going to read a short description about a possible change.

If travel US-74 and/or I-485:

[US-74/I-485] would add one additional lane in each direction.

If travel I-77:

I-77 would extend and convert the current HOV lane.

If do not travel any corridor:

Highways like the ones we have been discussing would provide one additional lane in each direction.

In order to use this express lane, you would have to pay a toll. If you were in a carpool you could use the lane for free. There would be entrances and exits onto this lane every three to five miles. Toll rates for this express lane would go up and down throughout the day to ensure it is never congested.”

Agree/Disagree with this statement?

Agree

- Once the new lanes are paid for, the tolls should be removed 80%
- **Tolled express lanes (TEL) will reduce commuting time for those using them 76%**
- TEL will decrease congestion for those using them 70%
- **Using express lanes will give me a more predictable travel time 67%**
- Our tax money is enough to pay for new highway lanes without having to also pay tolls 62%
- **Paying for new lanes with tolls is better than waiting for construction funds to become available years later 64%**
- TEL will also decrease congestion for those using the regular lanes 63%

Continued. . .

Agree/Disagree with this statement?

- | | <u>Agree</u> |
|--|--------------|
| • TEL will also decrease commuting time for those using the regular lanes | 60% |
| • TEL are fair because the person who benefits more, pays more | 59% |
| • TEL will help increase the number of people carpooling because carpools use these lanes for free | 58% |
| • TEL are unfair to those who cannot afford to use them | 57% |
| • I would pay to use the express lanes in order to avoid congestion | 52% |
| • Carpools will have slower speeds because of tolls in the I-77 HOV lane (I-77 only) | 48% |
| • TEL will help increase the number of people riding buses because buses use . . . for free | 46% |

Percent Who Agree With Statement by # of Days Typically Travel US-74 Corridor

	Days Travel US-74		
	<u>4+</u>	<u>1 to 3</u>	<u>0</u>
• Once paid for, tolls should be removed	87%	79%	78%
• TEL will reduce commuting time - those using them	73%	80%	75%
• TEL will decrease congestion - those using them	69%	66%	72%
• TEL will give me a more predictable travel time	65%	71%	65%
• Tax money is enough to pay for new highway lanes	70%	62%	60%
• Paying w/ tolls better than waiting for funds years later	66%	64%	63%
• TEL decrease congestion - those using regular lanes	63%	61%	65%
• TEL decrease commuting time - those using regular lanes	62%	57%	61%
• TEL are fair because person who benefits more, pays more	53%	62%	60%
• TEL will increase number of people carpooling	63%	59%	56%
• TEL are unfair to those who cannot afford to use them	62%	57%	54%
• I'd pay to use express lanes to avoid congestion	47%	57%	52%
• Carpools will have slower speeds with tolls in HOV lane	na	na	na
• TEL will increase # of people riding buses	50%	49%	44%

Percent Who Agree With Statement by # of Days Typically Travel I-485 Corridor

	Days Travel I-485		
	<u>4+</u>	<u>1 to 3</u>	<u>0</u>
• Once paid for, tolls should be removed	89%	81%	76%
• TEL will reduce commuting time - those using them	74%	79%	76%
• TEL will decrease congestion - those using them	68%	73%	70%
• TEL will give me a more predictable travel time	62%	73%	66%
• Tax money is enough to pay for new highway lanes	73%	68%	55%
• Paying w/ tolls better than waiting for funds years later	61%	63%	65%
• TEL decrease congestion - those using regular lanes	60%	65%	64%
• TEL decrease commuting time - those using regular lanes	67%	62%	56%
• TEL are fair because person who benefits more, pays more	46%	64%	62%
• TEL will increase number of people carpooling	60%	56%	58%
• TEL are unfair to those who cannot afford to use them	62%	62%	51%
• I'd pay to use express lanes to avoid congestion	48%	64%	47%
• Carpools will have slower speeds with tolls in HOV lane	na	na	na
• TEL will increase # of people riding buses	47%	52%	43%

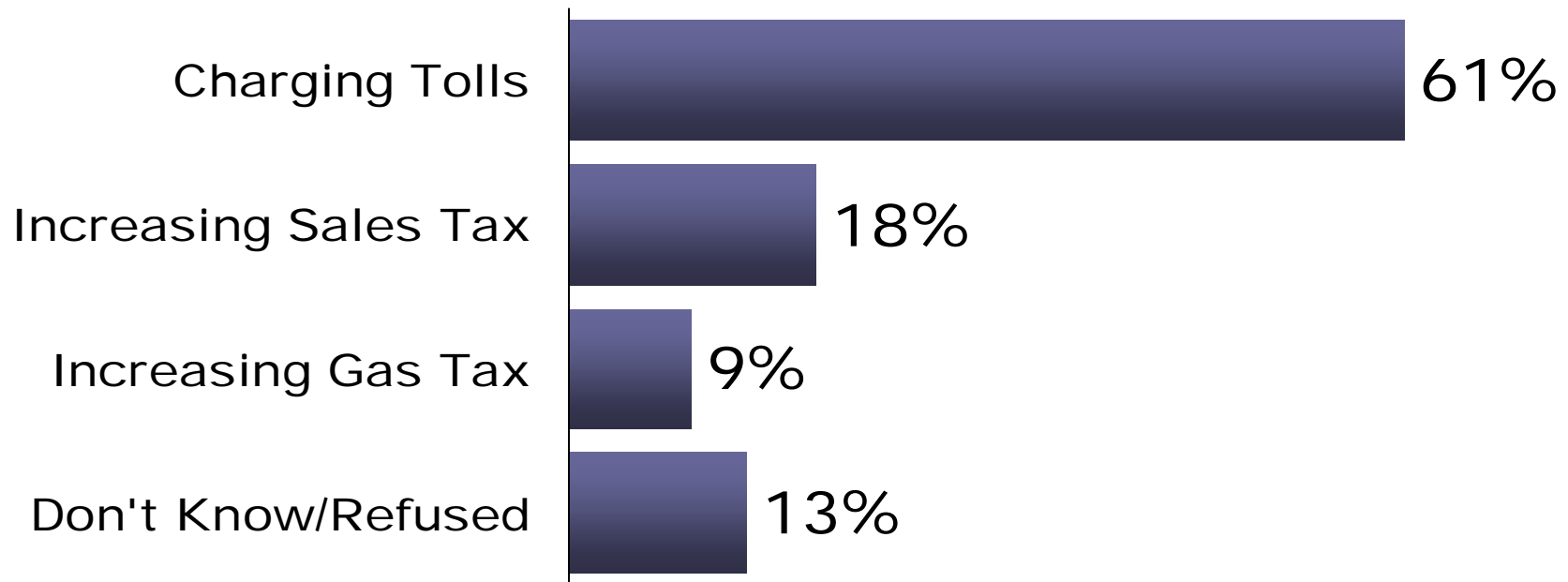
Percent Who Agree With Statement by # of Days Typically Travel I-77 Corridor

	Days Travel I-77		
	<u>4+</u>	<u>1 to 3</u>	<u>0</u>
• Once paid for, tolls should be removed	85%	82%	79%
• TEL will reduce commuting time - those using them	66%	77%	78%
• TEL will decrease congestion - those using them	57%	70%	72%
• TEL will give me a more predictable travel time	62%	64%	68%
• Tax money is enough to pay for new highway lanes	61%	68%	61%
• Paying w/ tolls better than waiting for funds years later	54%	68%	65%
• TEL decrease congestion - those using regular lanes	55%	63%	65%
• TEL decrease commuting time - those using regular lanes	57%	58%	61%
• TEL are fair because person who benefits more, pays more	59%	55%	60%
• TEL will increase number of people carpooling	51%	57%	60%
• TEL are unfair to those who cannot afford to use them	58%	58%	56%
• I'd pay to use express lanes to avoid congestion	54%	52%	51%
• Carpools will have slower speeds with tolls in HOV lane	55%	43%	na
• TEL will increase # of people riding buses	45%	47%	47%

Total Adults

Paying for Addition of New Lanes

“For the roads we have been discussing, if money needs to be raised for adding new lanes, how would you prefer to pay for those new lanes?”



Travelers

Paying for Addition of New Lanes

“For the roads we have been discussing, if money needs to be raised for adding new lanes, how would you prefer to pay for those new lanes?”

	Travel on Any Corridor		
	4+Days	1-3 Days	0 days
# of Adults (000):	<u>293.4</u>	<u>211.1</u>	<u>145.9</u>
Charging Tolls	53%	71%	64%
Increasing Sales Tax	21%	13%	16%
Increasing Gas Tax	8%	8%	9%
Don't Know/Refused	17%	7%	11%

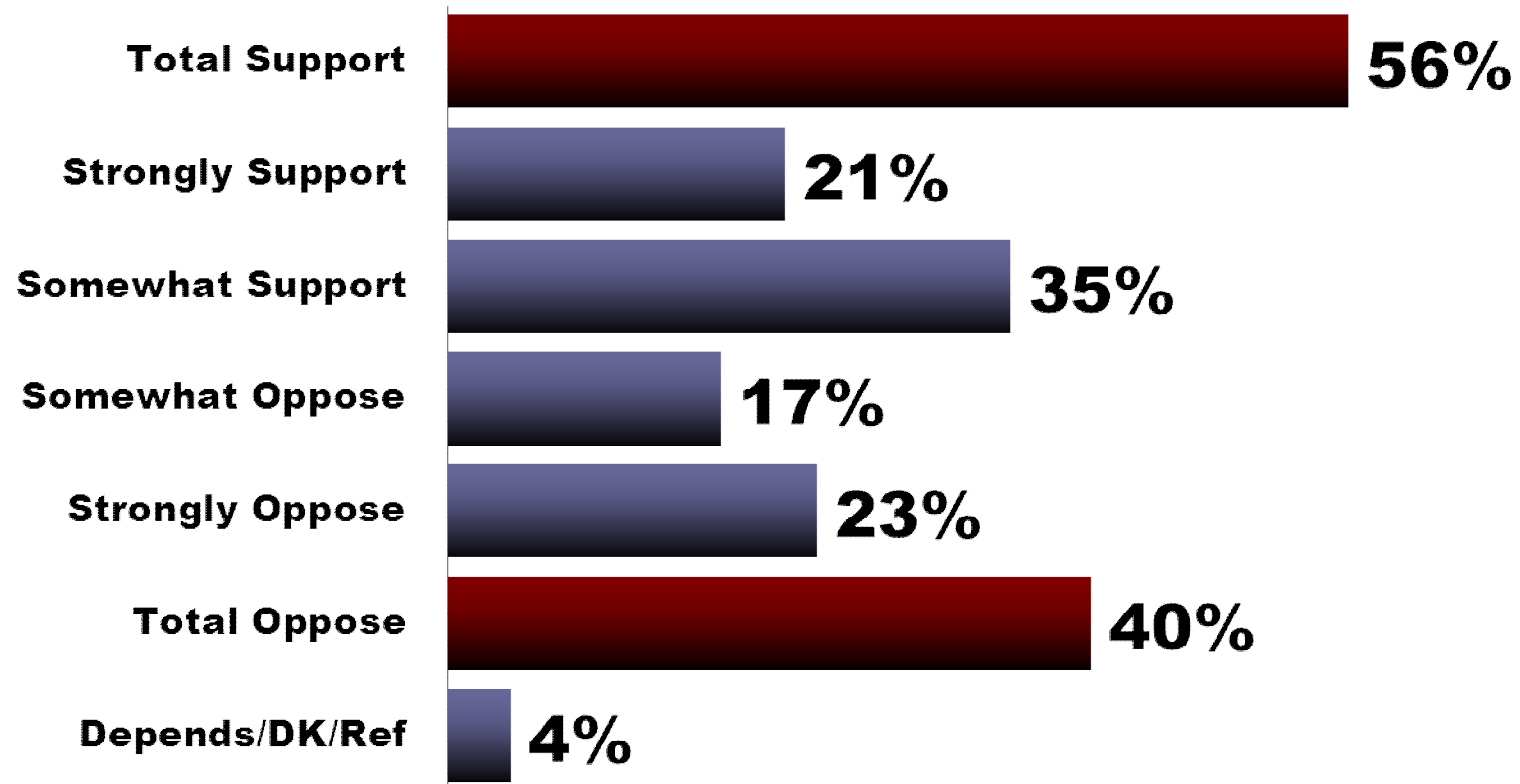
Support for Constructing Express Lanes



Total Adults

Construction of Toll Lanes

“Based on what you know at this point, do you [support/oppose] the construction of new tolled express lanes for roads we have been discussing?”



US-74 Travelers

Construction of Toll Lanes

“Based on what you know at this point, do you [support/oppose] the construction of new tolled express lanes for roads we have been discussing?”

	Total Adults	Days Travel US-74		
		4+	1-3	0
Projected Adults (000)	<u>650.5</u>	<u>130.9</u>	<u>158.8</u>	<u>359.0</u>
Total Support	56%	47%	60%	58%
Strongly Support	21%	20%	22%	21%
Somewhat Support	35%	27%	38%	37%
Somewhat Oppose	17%	19%	15%	18%
Strongly Oppose	23%	31%	20%	21%
Total Oppose	40%	50%	35%	28%
It Depends	2%	2%	4%	2%
DK/Refused	1%	1%	1%	2%

I-485 Travelers

Construction of Toll Lanes

“Based on what you know at this point, do you [support/oppose] the construction of new tolled express lanes for roads we have been discussing?”

	Total Adults	Days Travel I-485		
		4+	1-3	0
Projected Adults (000)	<u>650.5</u>	<u>141.3</u>	<u>167.0</u>	<u>329.9</u>
Total Support	56%	51%	61%	56%
Strongly Support	21%	21%	30%	17%
Somewhat Support	35%	30%	31%	39%
Somewhat Oppose	17%	19%	16%	18%
Strongly Oppose	23%	29%	19%	21%
Total Oppose	40%	48%	35%	39%
It Depends	2%	<.5%	3%	3%
DK/Refused	1%	1%	1%	2%

I-77 Travelers

Construction of Toll Lanes

“Based on what you know at this point, do you [support/oppose] the construction of new tolled express lanes for roads we have been discussing?”

	Total Adults	Days Travel I-77		
		4+	1-3	0
Projected Adults (000)	<u>650.5</u>	<u>96.6</u>	<u>129.8</u>	<u>417.2</u>
Total Support	56%	54%	60%	56%
Strongly Support	21%	21%	22%	21%
Somewhat Support	35%	33%	38%	35%
Somewhat Oppose	17%	11%	12%	20%
Strongly Oppose	23%	32%	26%	19%
Total Oppose	40%	43%	38%	40%
It Depends	2%	1%	1%	3%
DK/Refused	1%	2%	1%	1%

Commuters

Construction of Toll Lanes

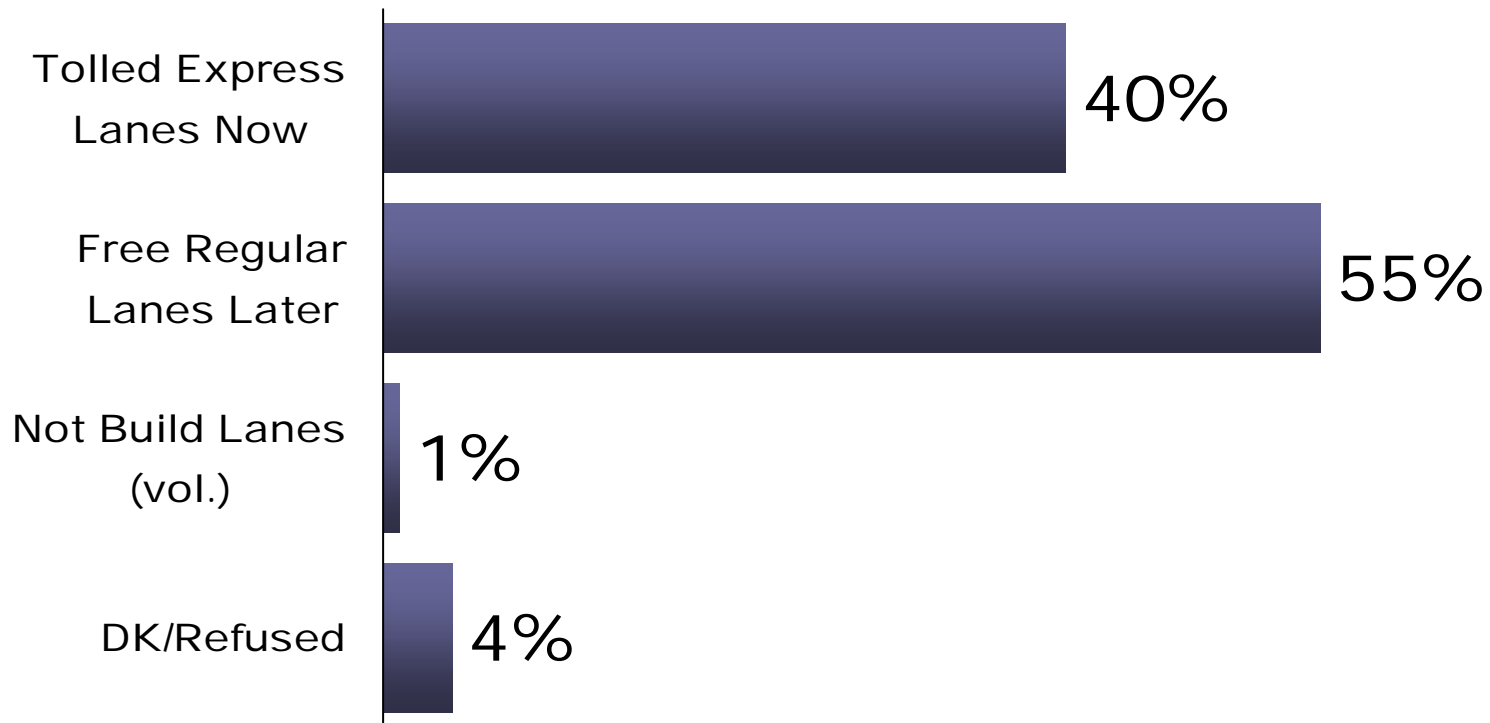
“Based on what you know at this point, do you [support/oppose] the construction of new tolled express lanes for roads we have been discussing?”

	Perceived Congestion			
	Going to		Returning	
	Very	<Very	Very	<Very
Commuters (000)	<u>196.6</u>	<u>106.4</u>	<u>188.4</u>	<u>113.3</u>
Total Support	55%	52%	58%	46%
Strongly Support	26%	17%	28%	13%
Somewhat Support	29%	35%	30%	34%
Somewhat Oppose	13%	22%	10%	29%
Strongly Oppose	28%	21%	27%	23%
Total Oppose	42%	44%	38%	52%
It Depends	2%	4%	3%	1%
DK/Refused	1%	1%	1%	1%

Total Adults

Toll Lanes vs. Regular Lanes Later

“If you had a choice between adding tolled express lanes now or adding free regular lanes later when public money is available, which would you choose?”



US-74 Travelers

Toll Lanes vs. Regular Lanes Later

“If you had a choice between adding tolled express lanes now or adding free regular lanes later when public money is available”

	Days Travel US-74			
	Total Adults	4+	1-3	0
Projected Adults (000)	<u>650.5</u>	<u>130.9</u>	<u>158.8</u>	<u>359.0</u>
Tolled Lanes Now	40%	30%	41%	44%
Regular Lanes Later	55%	63%	56%	52%
<u>Voluntary/Not Read</u>				
Not Build Any Lanes	1%	2%	<.5%	1%
Don't know/Refused	4%	5%	3%	4%

I-485 Travelers

Toll Lanes vs. Regular Lanes Later

“If you had a choice between adding tolled express lanes now or adding free regular lanes later when public money is available”

	Days Travel I-485			
	Total Adults	4+	1-3	0
Projected Adults (000)	<u>650.5</u>	<u>141.3</u>	<u>167.0</u>	<u>329.9</u>
Tolled Lanes Now	40%	32%	49%	40%
Regular Lanes Later	55%	65%	48%	54%
<u>Voluntary/Not Read</u>				
Not Build Any Lanes	1%	1%	<.5%	1%
Don't know/Refused	4%	2%	4%	5%

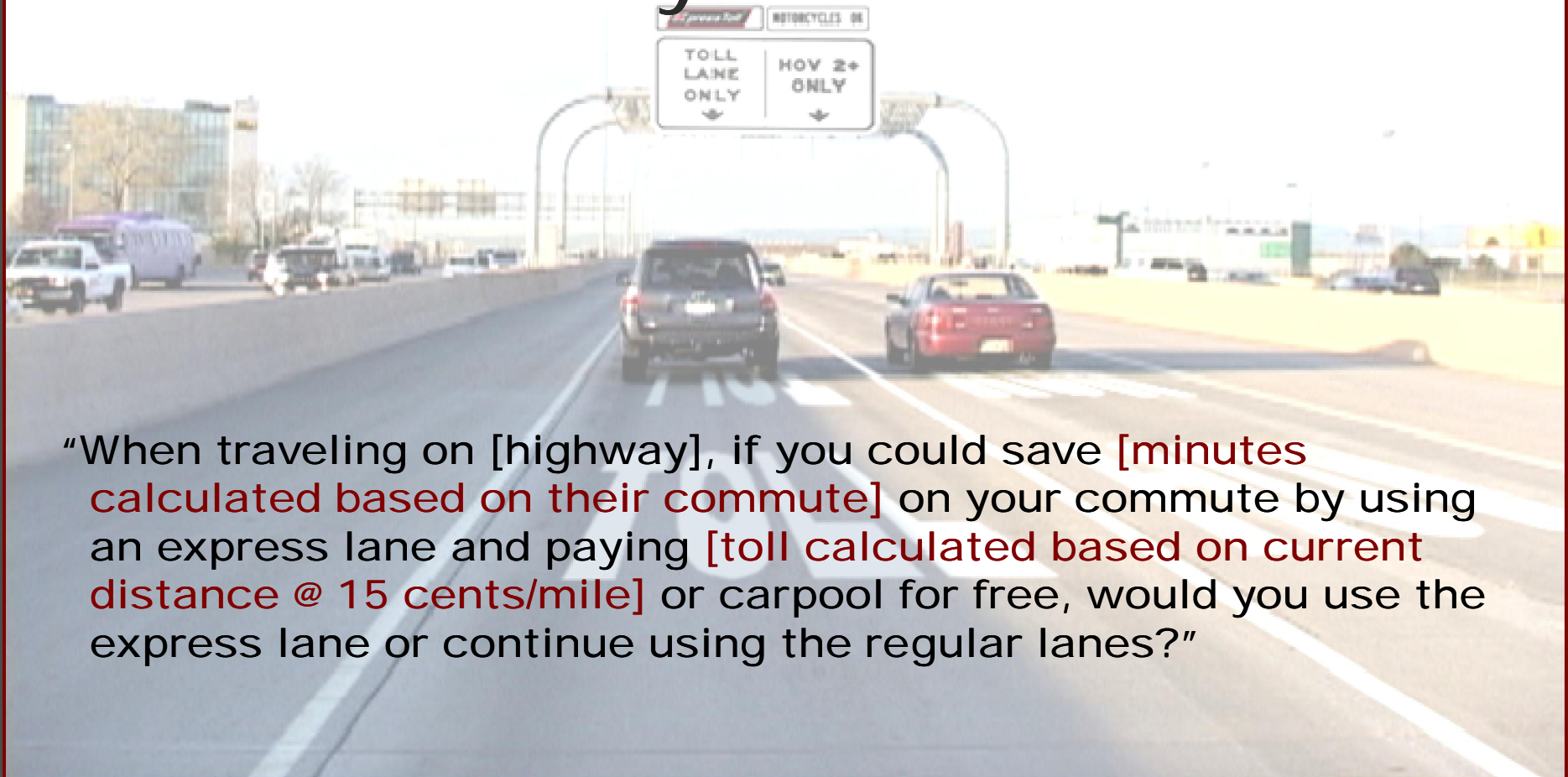
I-77 Travelers

Toll Lanes vs. Regular Lanes Later

“If you had a choice between adding tolled express lanes now or adding free regular lanes later when public money is available”

		Days Travel I-77		
	Total Adults	4+	1-3	0
Projected Adults (000)	<u>650.5</u>	<u>96.6</u>	<u>129.8</u>	<u>417.2</u>
Tolled Lanes Now	40%	43%	43%	39%
Regular Lanes Later	55%	52%	53%	56%
<u>Voluntary/Not Read</u>				
Not Build Any Lanes	1%	1%	1%	1%
Don't know/Refused	4%	5%	3%	4%

Commuters: What would you do?



“When traveling on [highway], if you could save [minutes calculated based on their commute] on your commute by using an express lane and paying [toll calculated based on current distance @ 15 cents/mile] or carpool for free, would you use the express lane or continue using the regular lanes?”

Commuters

What would you do?

Scenario: Would you use the express lane or continue using the regular lanes?

	Commute 1+ Days		
	US-74	I-485	I-77
# of Commuters (000):	<u>154.7</u>	<u>180.7</u>	<u>127.3</u>
Express Lanes	40%	36%	38%
Pay Toll	22%	23%	22%
Carpool	16%	13%	13%
Don't know - car vs. toll	1%	<.5%	2%
Regular Lanes	53%	52%	47%
Don't Know/Refused	2%	3%	3%
Not save enough time (< 2 mins.)	5%	9%	12%

Commuters

Those Who Would Not Pay Toll

“What is the main reason you would not pay the toll?”

	Commute on		
	<u>US-74</u>	<u>I-485</u>	<u>I-77</u>
• Cost/ too much money/ Can't afford it	25%	20%	21%
• Taxes/ gas prices should pay for it	23%	28%	26%
• Just would not pay toll as a matter of principle	12%	10%	7%
• Toll option not necessary/ commute not bad	13%	16%	11%
• Toll system does not work	13%	4%	3%
• Not enough savings for cost	6%	8%	16%
• Would take alternate route	2%	1%	1%
• Other	6%	5%	4%
• Don't Know/Refused	1%	8%	12%



Proposed Carpooling Change

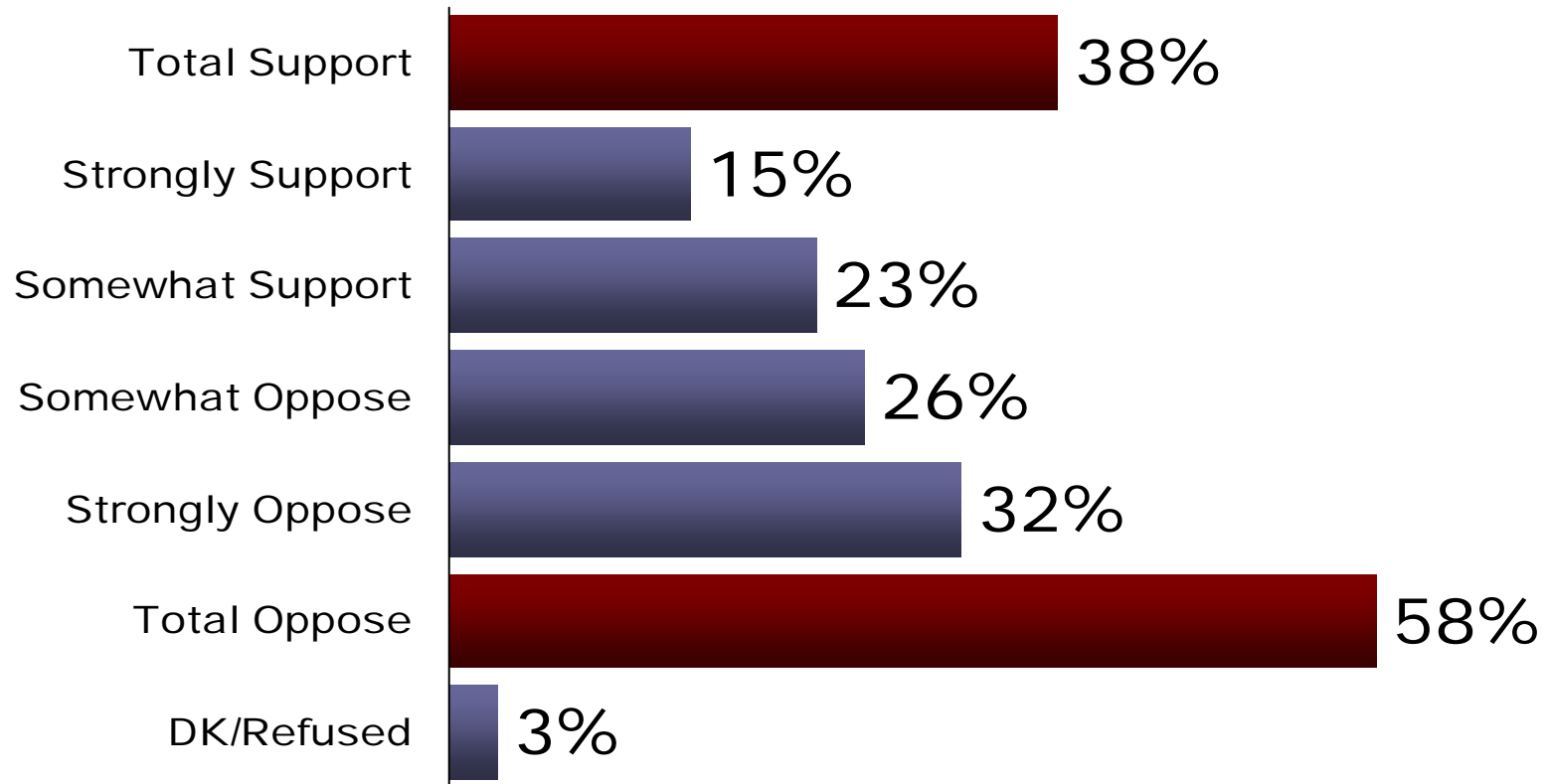
In order to make more money to help pay for the construction of new express lanes, two-person carpools may also have to pay the toll. In this situation, only carpools with three or more people could use the express lanes for free.

Do you strongly support, somewhat support, somewhat oppose or strongly oppose having two-person carpools pay a toll?

Total Adults

Two-Person Carpools

“Do you strongly support, somewhat support, somewhat oppose or strongly oppose having two-person carpools pay a toll?”



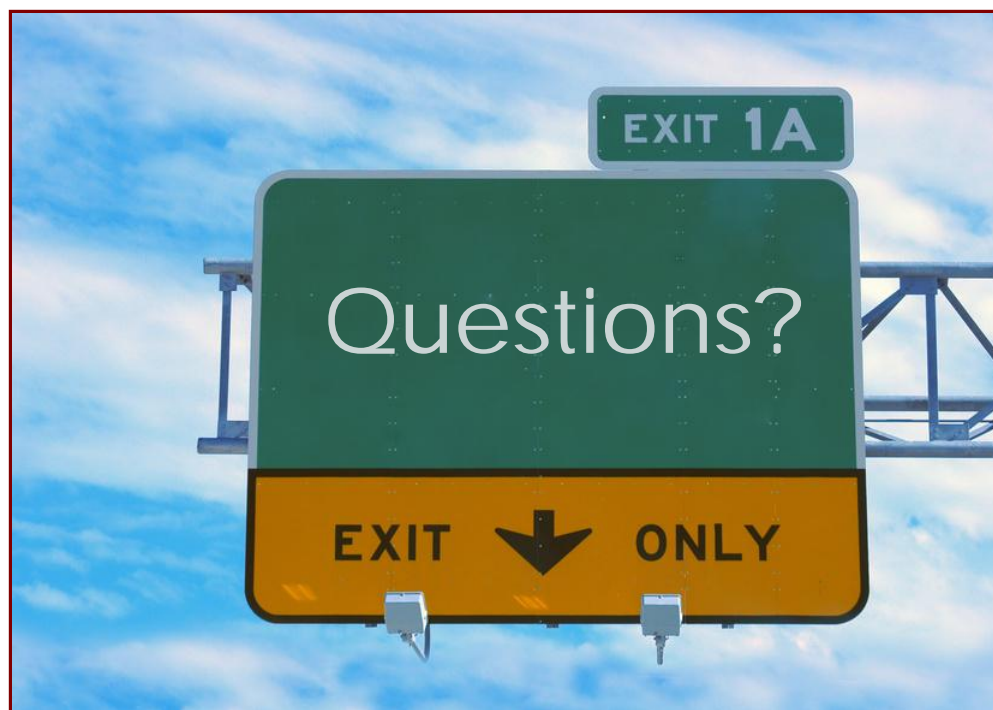
Total Adults

Two-Person Carpools

“Do you strongly support, somewhat support, somewhat oppose or strongly oppose having two-person carpools pay a toll?”

	Construction of new tolled Express Lanes?			
	Strongly Support	Somewhat Support	Somewhat Oppose	Strongly Oppose
	<u>100%</u>	<u>100%</u>	<u>100%</u>	<u>100%</u>
Total Support	63%	42%	30%	19%
Strongly Support	38%	10%	5%	10%
Somewhat Support	25%	32%	25%	9%
Somewhat Oppose	17%	36%	42%	14%
Strongly Oppose	20%	22%	29%	67%
Total Oppose	37%	58%	70%	81%

Note: Based on the 94% of the total sample (n=853) who took a position on both questions



Thank You

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