



Commissioned by the Missouri Department of Transportation

## A Report Card From Missourians



# Final Report 2013

Prepared By:



**HEARTLAND**  
MARKET RESEARCH LLC  
*Helping You Better*  
*Understand Your Stakeholders<sup>SM</sup>*

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## **Final Report**

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# *A Report Card from Missourians - 2013*

Prepared for the  
Missouri Department of Transportation

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The opinions, findings, and conclusions expressed in this publication are those of the principal investigator. They are not necessarily those of the Missouri Department of Transportation, the U.S. Department of Transportation or the Federal Highway Administration. This report does not constitute a standard or regulation.

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## EXECUTIVE SUMMARY

### BACKGROUND

Heartland Market Research LLC completed a comprehensive statewide customer satisfaction study to evaluate MoDOT's overall performance as perceived by Missouri's general public and to identify the transportation services and improvements that are most important to Missourians. The survey asked questions to populate multiple MoDOT Tracker measures and to assess the public's support for transportation. Heartland Market Research obtained a representative sample of the state as well as each of MoDOT's seven districts, with a minimum of 500 respondents per district. A total of 3,552 Missourians participated in the study.

### GENERAL SATISFACTION FINDINGS

- **The vast majority of Missourians are satisfied with the job MoDOT is doing. Overall satisfaction was at 85%, tying the highest recorded satisfaction levels previously recorded in 2012 and 2009.**
- 32% of Missourians are very satisfied with the job MoDOT is going, breaking the previous record of 28% set in 2011.
- While overall satisfaction with MoDOT remains at a record high, most measures of satisfaction with individual MoDOT services have stayed the same or dropped from the previous year.
- Missourians continue to agree that MoDOT provides accurate (93%), timely (92%), and understandable (92%) information about projects in their area, similar to the statistical results since 2009.
- Customer perception that MoDOT is the "primary transportation expert" remains similar (no statistical difference) to results since 2009. 91% of Missourians agreed with this statement, same as 2012, up 1% from 2011, down 2% from 2010, and up 6% from 2008.
- 87% of the residents indicated they trust MoDOT to keep its commitments to the public compared to 88% last year. While the annual change is within the statistical margin of error, this is part of four-year downward trend from 92% in 2010. The four-year drop is statistically significant.
- 75% of Missourians were satisfied with the job MoDOT has done keeping the surface of major highways in good condition. The dissatisfaction rate of 25% was the highest measured since it was 33% in 2009.
- Most (84%) residents agreed that MoDOT did a good job of minimizing travel delays caused by construction and maintenance on highways, similar to the findings from 2012. 93% of Missourians agreed that MoDOT did a good job providing advanced warnings to motorists before they entered work zones.

## FUNDING FINDINGS

- **59% of Missourians believe MoDOT's funding should be increased, the highest ever recorded since the question was first asked in 2009.** 36% thought it should remain the same, and 5% thought it should be decreased.
- Residents continued to select tolling as the most acceptable of several listed options for increasing revenues to adequately fund Missouri state highways and roads from the options of replace gas tax with travel tax (9%), increase car registration and license fees (11%), add tolls (27%), increase fuel tax (15%), and increase sales tax (22%). While *none of these* was not provided as an option, 16% of Missourians volunteered this option anyway, showing a strong disagreement with the idea of raising or creating taxes by these methods.
- Two-thirds of Missourians agreed that government transportation expenditures personally benefitted them, similar to findings from 2012. This compares to Education (80%), Public Safety (73%), Economic Development (50%), and Social Services (35%).
- Over 80% of Missourians thought that six highway services were very important. 93% thought it very important for MoDOT to keep bridges in good condition and to keep the surface of major highways in good condition. Managing snow and ice on highways came in third at 87%. 82% of respondents believed that keeping the surface of other highways in good condition, providing easy-to-understand highway signs, and providing bright striping on highways was very important.

## IMPORTANCE-SATISFACTION ANALYSIS FINDINGS

- In 2013, Missourians indicated there were two services that they believed were both very important and were very satisfied with MoDOT's performance. Both measures had to do with signage. According to the Importance-Satisfaction Matrix, MoDOT should continue their existing efforts here as Missourians are both very satisfied with these services and believe they are very important.
- In 2013, **Missourians indicated there were a number of very important services needing improvement.** The Importance-Satisfaction Ratings (Appendix A) provides guidance on where improving a service will provide the greatest overall increase in Missourian satisfaction.
- Based upon the importance-satisfaction analysis, MoDOT can most improve resident satisfaction with improved offerings on four key services:
  1. Keeping the surface of *other* highways in good condition.
  2. Keeping the surface of *major* highways in good condition.
  3. Keeping bridges in good condition.
  4. Minimizing congestion on highways.

## COMMUNICATIONS

- Missourians were most likely (83%) to gain information about MoDOT projects and activities from the department's highway message boards.
- The only other source utilized by the majority of citizens (80%) was the local media (television, radio, and newspaper).
- At 30%, the internet was the third most likely method citizens used to gain information about MoDOT projects and activities.
- Approximately one in five (19%) Missourians utilized smartphones to obtain information from MoDOT about highway projects and activities. Out of these, 52% utilized text alerts and 43% used MoDOT apps on their smartphones.
- When asked to rank their preferred methods of communicating with MoDOT, 50% of all Missourians selected the phone. At 17%, email came in second.



## CONCLUSIONS

- The findings are clear that overall satisfaction remains at a record high. Moreover, the ratio between those very satisfied and satisfied – a measure of how deep or solid the underlying satisfaction is – is the highest ever measured.
- However, Missourians are showing increased concern about MoDOT’s ability to meet their transportation needs. Most measures of satisfaction with individual MoDOT services have stayed the same or dropped slightly from the previous year and public confidence that MoDOT will keep its commitments – while still high – continues to trend downward.
- The most likely explanation for this apparent contradiction is the public awareness of the massive funding cuts MoDOT has experienced. The public’s faith in MoDOT’s competence has certainly not decreased as measured by both the percentage that perceive MoDOT as Missouri’s transportation expert and the increase in the number of citizens very satisfied with MoDOT.
- Citizens have reacted to the situation by increasing their disapproval to services they may perceive as non-essential (i.e., 74% of Kansas City residents disagreed that KC Scout provided value, similar to the 72% of St. Louis residents who disagreed that the Gateway Guide provided value). 59% of all Missourians also believe funding for transportation in Missouri should be increased over the next five years, the highest percentage ever recorded since the question was first asked in 2009. This was a jump of 7% from 2012.
- **Thus the contrast between these two key findings – 1) MoDOT’s high satisfaction rates, including the large increase in those very satisfied with MoDOT and 2) Missourians showing increased concern about MoDOT’s ability to meet their transportation needs – can be best explained by the public’s belief that MoDOT is doing a great job with insufficient resources.**
- MoDOT should continue to utilize multiple sources to distribute information about their projects and activities. Two methods under MoDOT’s control show great potential. The department’s use of highway message boards is very effective, reaching more Missourians than any other method. The fact that 19% of citizens use smartphones to access MoDOT information just six years after smartphone applications became feasible shows the explosive potential of this medium. MoDOT can anticipate that citizen use of text alerts and apps will continue to increase very rapidly.

**METHODOLOGY**

The survey was administered by a professional calling center to Missourians starting on July 9, 2013 and ending on August 19, 2013. The calling center randomly called a representative sample of people from every county considering age and gender. During this time, the calling center made 248,605 calls, spoke with 15,429 people, and completed 3,552 phone interviews. The following tables show how many surveys were conducted in each county. Some counties had significantly more participants than others due to the research design mandating a minimum of 500 responses per district.

Northwest		Northeast		Kansas City		Central	
Andrew	25	Adair	30	Cass	56	Boone	28
Atchison	25	Audrain	30	Clay	56	Callaway	28
Buchanan	25	Clark	30	Jackson	56	Camden	28
Caldwell	26	Knox	29	Johnson	57	Cole	28
Carroll	26	Lewis	30	Lafayette	57	Cooper	28
Chariton	25	Lincoln	29	Pettis	55	Crawford	27
Clinton	25	Macon	30	Platte	57	Dent	27
Daviess	25	Marion	31	Ray	55	Gasconade	28
DeKalb	26	Monroe	29	Saline	55	Howard	28
Gentry	26	Montgomery	29			Laclede	28
Grundy	28	Pike	29			Maries	27
Harrison	26	Ralls	30			Miller	28
Holt	29	Randolph	30			Moniteau	28
Linn	26	Schuyler	30			Morgan	28
Livingston	25	Scotland	30			Osage	30
Mercer	25	Shelby	29			Phelps	27
Nodaway	25	Warren	32			Pulaski	28
Putnam	25					Washington	29
Sullivan	25						
Worth	25						
Total	513	Total	507	Total	504	Total	503

St. Louis		Southwest		Southeast	
Franklin	100	Barry	23	Bollinger	20
Jefferson	101	Barton	25	Butler	20
Saint Charles	101	Bates	24	Cape Girardeau	20
Saint Louis	103	Benton	24	Carter	20
Saint Louis City	100	Cedar	23	Douglas	20
		Christian	24	Dunklin	20
		Dade	24	Howell	21
		Dallas	24	Iron	20
		Greene	24	Madison	21
		Henry	24	Mississippi	20
		Hickory	24	New Madrid	20
		Jasper	24	Oregon	21
		Lawrence	24	Ozark	22
		McDonald	23	Pemiscot	20
		Newton	24	Perry	20
		Polk	24	Reynolds	20
		Saint Clair	24	Ripley	20
		Stone	29	Saint Francois	20
		Taney	24	Sainte Genevieve	20
		Vernon	24	Scott	20
		Webster	24	Shannon	21
				Stoddard	22
				Texas	24
				Wayne	21
				Wright	20
Total	505	Total	507	Total	513

Most statewide results presented are weighted results. A few (e.g., the demographics) are not and these are noted as such when presented. The data were weighted in accordance with the true distribution of the regional population in terms of geographic (county), gender, and age distributions using the most recent (2010) U.S. government census information available. Following past practice, all district measures presented are unweighted. **With a minimum of 500 responses per district, the district measures have a 95% level of confidence with a precision (margin of error) of +/- 4.4%. The statewide results for the stratified-random sample of 3,552 Missourians have a 95% level of confidence with a precision of +/- 1.6%.**

Following standard practice for Tracker measures, responses of don't know/not sure and none chosen/refused were excluded from many of the results in this report. This practice also facilitated valid comparisons of the results with previous customer satisfaction surveys. The summaries in Section 3 provide the results calculated both ways (with the standard exclusions and showing the percentage of don't know/not sure responses). All charts, graphs, and summaries are rounded. More precise numbers rounded to the nearest tenth of a percent may be found in the tables in Sections 2 and 3. Totals may not sum to exactly 100% because of rounding artifacts.

The survey was significantly revised from the previous year based on suggestions for improvement from Heartland Market Research LLC and QVSM in collaboration with MoDOT. Efforts were made to standardize how questions were asked to facilitate consistent standards across many measures. For example, the neutral option was dropped from the few questions that included it. Respondents who had no idea could still respond that they didn't know, and this change aligned these questions with standard Tracker practice. In order to make meaningful comparisons, the percentages for past measures where neutral was an option were recalculated to ignore these. This obviously increased both the number of satisfied and dissatisfied respondents from previous years. These changes also required the scales used for the importance-satisfaction analysis to be recalibrated.