



Commissioned by the Missouri Department of Transportation

A Report Card From Missourians



Final Report 2017

Prepared By:



HEARTLAND
MARKET RESEARCH LLC
Helping You Better
Understand Your StakeholdersSM

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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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16. Abstract Overall statewide satisfaction with MoDOT and additional feedback about MoDOT's operations was obtained from a representative sample of the general adult public in Missouri. A professional calling center was engaged to obtain a diverse sample across Missouri. Specific minimums were given, such as 500 responses per district, with gender and age-range targets for each county in Missouri. 3,502 completed responses were obtained between June 26, 2017 and July 31, 2017. With the exception of a few questions (e.g., demographics), all statewide results presented in this document are weighted results. The data was 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) US government census information available. Following past practice, all district measures presented in this document 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 3,502 Missourians have a 95% level of confidence with a precision of +/- 1.66%.			
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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 3,502 Missourians participated in the study.

GENERAL SATISFACTION FINDINGS

- **The majority of Missourians were satisfied with the job MoDOT is doing. Overall satisfaction was at 83% as compared to 81% in 2015.**
- 28% of Missourians were very satisfied with the job MoDOT is doing.
- Many measures of satisfaction with individual MoDOT services have stayed the same or slightly increased from 2015. While the overall satisfaction measures remain statistically similar to 2015, the strength of most measures has grown. In other words, the percentage of people who were very satisfied with MoDOT has increased in most satisfaction measures compared to 2015. This is an important finding because those who answer on the extremes – such as very satisfied or very dissatisfied – tend to be firm in their opinions. The greater the percentage of those in the middle – such as somewhat satisfied or somewhat dissatisfied – the greater the chance of movement in the other direction. Thus, **while the 2017 measures are statistically similar to 2015, the overall picture is one of a population that is more confident that MoDOT is satisfying their transportation needs than was the case two years ago.**
- Missourians continued to agree that MoDOT provides accurate (93%), timely (92%), and understandable (91%) information about projects in their areas, similar to the statistical results since 2009.
- 93% of Missourians agreed that MoDOT was the “primary transportation expert” similar to results since 2009.
- 87% of the residents indicated they trust MoDOT to keep its commitments to the public compared to 85% in 2015. In 2017, 41% of the population strongly agreed with this measure, up from 35% in 2015.
- 75% of Missourians were satisfied with the job MoDOT has done keeping the surface of major highways in good condition, compared to 70% in 2015.

- Missourian satisfaction with MoDOT's efforts to maintain other state highways (67%) and bridges (67%) were also higher than two years ago when both were measured at 63%.
- Most (86%) residents agreed that MoDOT did a good job of minimizing travel delays caused by construction and maintenance on highways, similar to the findings from 2015. 93% agreed that MoDOT did a good job providing advanced warnings to motorists before they entered work zones.

FUNDING FINDINGS

- **Most Missourians do not know the average driver currently pays \$30 per month in taxes and fees to fund Missouri state roads.**
- Out of those making an estimate, 36% of the respondent believed drivers spent less than \$30 per month, 37% selected the correct answer of \$30 per month, and 27% thought that Missouri drivers spent \$50 or more per month in taxes and fees.
- **86% of residents were willing to pay more to adequately fund Missouri state roads.**
- **Missourians grossly underestimate the cost of congestion, poor road conditions, and safety issues.** Over half of all respondents estimated this cost at under \$50 per month. 81% of the respondents thought the cost was \$100 or less per month. In 2016, the actual average cost per driver was about \$169 per month.
- In 2017, the option of increasing fuel taxes continued to grow in popularity, with 29% of the respondents selecting it as their preferred option for increasing funding for Missouri's state highways and roads. The option of raising fuel taxes was first selected by a plurality of residents (24%) in 2015 as the most acceptable option for increasing revenues to adequately fund Missouri state highways and roads. This was a significant increase from the 2013 score of 15%. Other listed options in 2017 included adding tolls (23%), increasing the sales tax (15%), replacing the gas tax with a mileage tax (12%), and increasing car registration and license fees (10%). **The option to increase fuel taxes was the *only* funding option to see a growth in overall support from 2015.** While *none of these* was not provided as an option, 12% of Missourians volunteered this option anyway.

IMPORTANCE-SATISFACTION ANALYSIS FINDINGS

- The essential findings of the Importance-Satisfaction analysis were similar to those measured in 2015 other than the change in the perceived importance of MoDOT's mowing and trimming the foliage along state highways. This has increased since 2015.
- In 2017, **Missourians indicated there were a number of very important services needing improvement.** Based upon the importance-satisfaction analysis, MoDOT can most improve resident satisfaction with improved offerings on three key services:
 1. Keeping bridges in good condition.
 2. Keeping the surface of *major* highways in good condition.
 3. Keeping the surface of *other* highways in good condition.

CONCLUSIONS

- The findings were clear that overall satisfaction remained high, and has increased slightly over the last two years. Moreover, the ratio between those very satisfied and satisfied – a measure of how deep or solid the underlying satisfaction is – has increased from 2015.
- While most measures of satisfaction with individual MoDOT services have stayed the same or increased slightly from 2015, they are still slightly below most of the 2013 measures. When considering this year's results along with some of the conclusions of the 2015 research – "...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 well with insufficient resources" – one is left with the impression that Missourians are both satisfied with MoDOT's service in the current resource environment and are more open to the idea of increasing transportation funding through increasing the fuel tax.

METHODOLOGY

The survey was administered by a professional calling center to Missourians starting on June 26, 2017 and ending on July 31, 2017. The calling center randomly called a representative sample of people from every county considering age and gender. During this time, the calling center made 189,228 calls, spoke with 10,103 people, and completed 3,502 phone interviews. The average respondent took 14.5 minutes to complete the survey. 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	29	Cass	53	Boone	26
Atchison	24	Audrain	32	Clay	54	Callaway	31
Buchanan	27	Clark	30	Jackson	62	Camden	28
Caldwell	26	Knox	27	Johnson	53	Cole	27
Carroll	28	Lewis	32	Lafayette	53	Cooper	28
Chariton	24	Lincoln	29	Pettis	54	Crawford	31
Clinton	24	Macon	30	Platte	64	Dent	27
Daviess	24	Marion	31	Ray	53	Gasconade	27
DeKalb	24	Monroe	31	Saline	55	Howard	29
Gentry	24	Montgomery	30			Laclede	27
Grundy	25	Pike	32			Maries	27
Harrison	25	Ralls	28			Miller	27
Holt	24	Randolph	29			Moniteau	27
Linn	28	Schuyler	27			Morgan	27
Livingston	24	Scotland	28			Osage	29
Mercer	25	Shelby	28			Phelps	27
Nodaway	25	Warren	28			Pulaski	28
Putnam	25					Washington	27
Sullivan	28						
Worth	21						
Total	500	Total	501	Total	501	Total	500

St. Louis		Southwest		Southeast	
Franklin	101	Barry	23	Bollinger	19
Jefferson	100	Barton	24	Butler	24
Saint Charles	100	Bates	23	Cape Girardeau	19
Saint Louis	100	Benton	23	Carter	19
Saint Louis City	99	Cedar	23	Douglas	19
		Christian	26	Dunklin	19
		Dade	23	Howell	19
		Dallas	25	Iron	19
		Greene	23	Madison	19
		Henry	23	Mississippi	19
		Hickory	23	New Madrid	20
		Jasper	22	Oregon	19
		Lawrence	23	Ozark	20
		McDonald	23	Pemiscot	21
		Newton	24	Perry	20
		Polk	23	Reynolds	22
		Saint Clair	24	Ripley	19
		Stone	25	Saint Francois	19
		Taney	24	Sainte Genevieve	21
		Vernon	26	Scott	22
		Webster	27	Shannon	19
				Stoddard	20
				Texas	19
				Wayne	24
				Wright	20
Total	500	Total	500	Total	500

Most statewide results presented are weighted results. The demographic responses 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 3,502 Missourians have a 95% level of confidence with a precision of +/- 1.66%.**

Following standard practice for Tracker measures, responses of don't know/not sure and none chosen/refused were excluded from the results in this report. This practice also facilitated valid comparisons of the results with previous customer satisfaction surveys. 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. Totals may not sum to exactly 100% because of rounding artifacts.

The survey was based on the previous (2015) statewide satisfaction study. At MoDOT's request, Question 8 was adjusted to be more current and Question 9 was added to gather citizen input on newer issues of concern. The wording of the other questions was kept the same as previous years to facilitate comparisons across surveys.