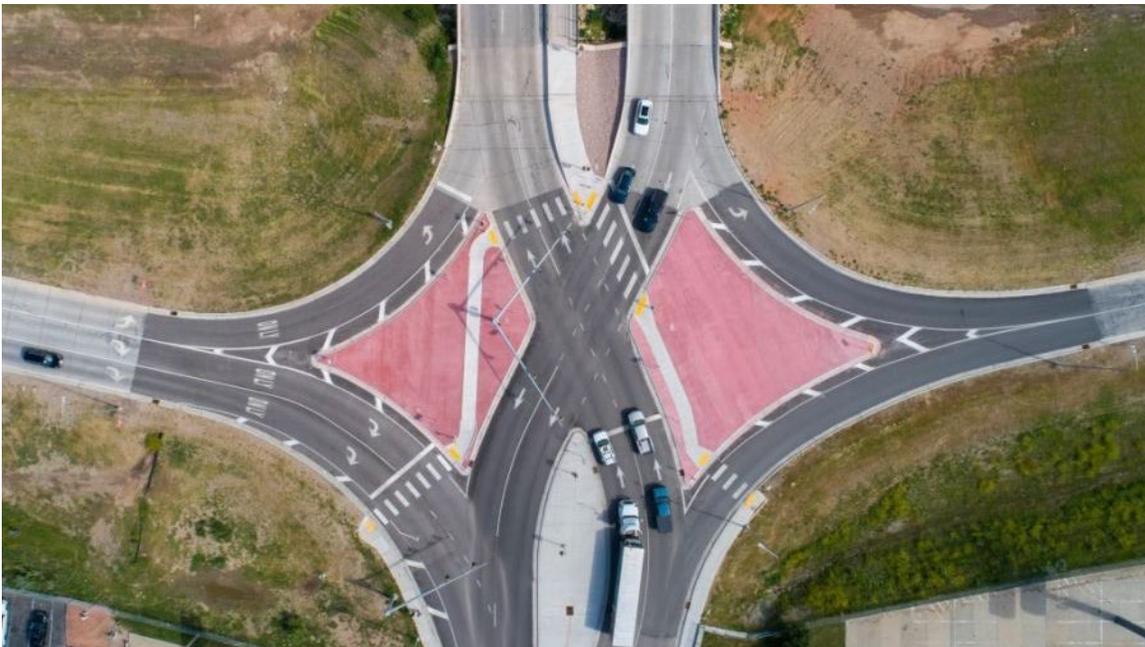




U.S. Department
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**Federal Highway
Administration**

SD2024-01-F



SDDOT 2025 Statewide Customer Satisfaction Assessment

Study SD2024-01

Final Report

Prepared by
ETC Institute
November 2025

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16. Abstract <p>This report summarizes perceptions of the South Dakota Department of Transportation's performance in delivering services to residents and key customer groups across South Dakota. It is the 10th in a series of surveys that track and monitor attitudes and needs among SDDOT customers, including the general public, farmers, emergency vehicle operators, and trucker/shippers. The study includes opinions of 1,221 residents, 377 truckers/shippers, 90 emergency vehicle operators, 310 farmers/ranchers, 379 senior citizens, 42 state legislators, and 106 contractors.</p> <p>Key objectives that guided this research were to: assess the opinions of the public and key customer groups regarding the composition, importance, and delivered quality of the SDDOT's key products and services; assess the opinions of key business partners regarding the effectiveness of SDDOT's business practices and relationships; assess progress in addressing customer concerns through SDDOT's ongoing efforts to develop and execute strategic plans; and identify actions SDDOT can take to improve its performance and the perception of customer groups and business partners regarding its performance.</p> <p>By objectively assessing the opinions of the public and key customer groups, this research provides a framework to help senior SDDOT managers continually identify and respond to the needs of its customers over time.</p>			
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LIST OF ABBREVIATIONS AND ACRONYMS

EV's.....	ELECTRIC VEHICLES
GIS.....	GEOGRAPHIC INFORMATION SYSTEMS
SDDOT.....	SOUTH DAKOTA DEPARTMENT OF TRANSPORTATION
SMS.....	SHORT MESSAGE SERVICE

1.0 EXECUTIVE SUMMARY

1.1 Purpose

In 2025, the South Dakota Department of Transportation (SDDOT) conducted a Statewide Customer Satisfaction Survey of residents and key customer groups including senior citizens, truckers, farmers/ranchers, and emergency vehicle operators. The purpose of the assessment was to gather statistically valid data from residents and persons who impact transportation decisions in the State of South Dakota to help identify short-term and long-term transportation priorities for the Department. The survey findings presented in this report will be used as part of SDDOT's ongoing strategic planning process. SDDOT previously completed statewide Customer Satisfaction Surveys in 1997, 1999, 2002, 2004, 2006, 2011, 2015, 2018 and 2021.

1.2 Objectives

The 2025 SDDOT Customer Satisfaction Assessment had five primary objectives:

1. To assess the opinions of the public and key customer groups regarding the composition, importance, and delivery quality of the Department of Transportation's key products and services. This objective was addressed by asking customers to assess the Department's performance in key areas of service delivery using an objective statistically valid survey administered to a random sample of residents. Stakeholder interviews were used to identify the expectations and concerns of external customers. Internal interviews with SDDOT managers were implemented to identify the informational needs of SDDOT employees. The "Significant Findings" section of this report has been developed to address this objective.
2. To assess the opinions of the highway construction industry regarding the effectiveness of SDDOT's business practices and relationships. This objective was accomplished through the administration of a statistically valid survey to contractors. The surveys gathered input on a wide range of issues related to SDDOT's business practices: the effectiveness of communication with business partners, the electronic bid letting system, paperwork requirements, the technical competence of SDDOT employees, and other issues. The "Significant Findings" section of this report addresses this objective along with Appendix C, which contains the results of the Contractor survey, and Appendix E, which contains the results for each of the other key customer groups surveyed.

3. To assess progress in identifying and addressing customer concerns through SDDOT's ongoing efforts to develop and execute strategic plans. This objective was accomplished by linking each question on the survey to specific elements in the Department's Strategic Plan. By identifying the relationship between survey questions and the Strategic Plan prior to the administration of the survey, SDDOT was able to link the results of the survey to specific components of the Strategic Plan. The "Conclusions" Section of this report has been developed to address this objective.
4. To identify specific actions that the Department can take to improve its performance and the perception of customer groups and business partners regarding its performance. This objective was addressed by using the results of the survey to identify the areas that should be prioritized by the Department over the next two years. The "Recommendations" Section of this report has been developed to address this objective.
5. To identify critical needs and opportunities for improved communication and outreach to customer groups. The survey contained a series of questions related to a wide range of communication and outreach issues. The "Significant Findings" section of this report has included findings to address this objective.

2.0 TASK DESCRIPTIONS

The 2025 SDDOT Customer Satisfaction Assessment consisted of ten major tasks. Each of these tasks is described below:

2.1 Task 1: Initial Meeting

In September 2024, ETC Institute conducted a virtual meeting with the members of the technical panel to establish goals and objectives for the project. At this meeting, the details of the research design strategy were discussed, and the research objectives were finalized. A list of transportation stakeholders and the SDDOT managers to be interviewed were also developed, along with a list of questions that should be asked of these individuals. In addition, ETC Institute began reviewing prior surveys and research administered by the SDDOT to ensure continuity between projects.

2.2 Task 2: Prepare Scripts for Stakeholder Interviews and Focus Groups

Based on the input from the initial meeting, ETC Institute developed three scripts:

1. Internal stakeholder interviews
2. External stakeholder interviews
3. The focus groups

The project's technical panel provided input on the scripts during the month of September. The scripts were all finalized in late October 2024.

2.3 Task 3: Stakeholder Interviews

Interviews were conducted with senior SDDOT managers along with key transportation stakeholders from across the State of South Dakota. Based on issues identified at the initial planning meeting, ETC Institute designed and administered a short open-ended interview that was administered to SDDOT managers (internal stakeholders) and stakeholders outside the department (external stakeholders). The purpose of the internal and external stakeholder interviews was to assess the perceptions that senior SDDOT managers and external stakeholders have about the delivery of services provided by the South Dakota Department of Transportation. The information from the internal and external interviews was used to develop questions for the statewide survey that was administered during the winter of 2024-25.

2.3.1 External Stakeholder Interviews

ETC Institute administered an external stakeholder survey online with 70 leaders of organizations outside the Department of Transportation who use transportation services or influence transportation decisions in the State of South Dakota. The survey was administered in the winter of 2024. The purpose of the external interviews was to gather input on a wide range of issues related to SDDOT's upcoming statewide customer satisfaction survey. The full summary of the external stakeholder interviews is provided in Appendix F. Selected findings are listed below:

- Most (76% of respondents) of the external stakeholders rated the quality of South Dakota highways as either "excellent" or "good," 21% rated the quality as "average," and 3% of respondents gave a "poor" rating.
- External stakeholders were asked to rate the value of services SDDOT provides for the State and Federal tax revenue the Department receives. Most (60%) respondents indicated it was either an "excellent" or "good" value, 30% indicated it was "average" value, and 8% indicated they "don't know."
- Compared to five years ago, 44% of external stakeholders indicated that they thought South Dakota's highway system had improved. Forty-four percent (44%) of respondents thought it had stayed about the same and only 6% thought it had gotten worse.
- Funding was mentioned by external stakeholders more often than any other issue as the biggest transportation challenge for South Dakota over the next 5-10 years.

2.3.2 Internal Stakeholder Interviews

ETC Institute conducted one-on-one interviews with 35 senior SDDOT managers during the winter 2024. The purpose of the internal interviews was to gather input about a wide range of issues related to the planning of SDDOT's statewide customer satisfaction survey. The full summary of the internal stakeholder interviews is provided in Appendix F. Selected findings are listed below:

- Every participant in the internal stakeholder interviews rated the overall quality of the State's transportation system as good (38%) or excellent (62%).
- All members of the Executive Team thought SDDOT's previous surveys had been valuable to the Department; 53% thought previous surveys has been "very valuable" to the Department.
- Most (85%) of the senior managers who were interviewed thought the State's transportation system had gotten better over the past five years. Only 15% thought it had stayed about the same.

- Communication and staffing-related issues were two areas that were mentioned frequently by members of the Executive Team as opportunities for improvement as well as funding which was similar to the external interviews.

2.4 Task 4: Conduct Focus Groups

Conduct focus groups. ETC Institute facilitated 12 focus groups for the South Dakota Department of Transportation (SDDOT) between December 9 and 14, 2024. The focus groups were conducted virtually, and participants were randomly selected to ensure good representation from the entire State. In addition to a representative random sample of residents, ETC Institute also paid special attention to the recruitment of individuals who fit into various special groups such as older drivers throughout the state, emergency vehicle operators, farmers and ranchers, truckers and shippers, and contractors.

Focus groups were designed and administered to accomplish the following objectives:

1. Identify the core expectations that residents and key customer groups had regarding the delivery of transportation services. This involved a discussion about which services are most important and why. Since expectations for transportation services change over time, the focus groups were used to validate the types of information that are being gathered on the survey and to measure satisfaction with services that had not been assessed in previous surveys.
2. Understand how residents and key customer groups evaluate the SDDOT's performance in different areas. This involved a discussion about what constitutes good (or bad) service delivery in order to identify performance measures that will assist SDDOT in better evaluating the delivery of specific services.
3. Identify ways that residents and core customer groups think the SDDOT could improve the delivery of specific services. This involved the solicitation of ideas regarding improvements to existing services as well as a discussion regarding the need for services that are not currently provided.

To ensure that the focus groups met their intended purposes, the following steps were carried out:

- A moderator's script was developed by ETC Institute based on input from the Technical Panel; moderators met with SDDOT staff to ensure that the project's goals were understood and achieved.
- A timeline was developed for the focus groups, ensuring that each of the major topic areas was covered in the 90-minute period. The moderator(s) rehearsed the script with a test audience at ETC Institute's focus group facility.

- A notebook was developed to ensure that note taking efforts were uniform. The notebook contained an outline of the moderator's script and provided ample room to write comments. Different notebooks were used to record comments from each of the focus groups.
- Debriefings were conducted at the end of each focus group to ensure that all pertinent points were captured and recorded.
- Notes from the completed focus group sessions were compiled and reviewed by the senior staff at ETC Institute for content and accuracy. The notes were compared to audio recordings of each meeting to ensure that all the information was accurate.

A wide range of topics were covered during the focus groups. These topics were grouped into the nine major areas of discussion listed below:

- Awareness of SDDOT
- Perceptions of the State's Highway System
- Construction/Detours
- Interaction With Local Communities
- Highway Safety and Traffic Flow
- Technology and Delivery Services
- Economic Development – Airport/Rail
- Public Information
- Value Provided by SDDOT
- Special Issues for Key Customer Groups

2.5 Task 5: Summarize Focus Group Findings

Following the completion of the focus groups, ETC Institute prepared a written summary of the findings and presented the findings to the technical panel during a webinar in February 2025. The full summary of the focus group findings is provided in Appendix G.

2.6 Task 6: Develop Survey Instruments

Based on the results of the interviews and feedback from the Executive Team, ETC Institute designed multiple survey instruments. One survey was designed to gather input from residents and key customer groups including truckers/shippers, emergency vehicle operators, farmers/ranchers, contractors, legislators, and senior citizens. A second survey was developed to gather additional quantitative input from contractors.

The resident survey/key customer group survey was approximately 15 minutes in length and administered by a combination of mail, phone, text, and the Internet. The contractor survey was about seven minutes in length and was administered by email, text, and phone to contractors who had done work for SDDOT during the previous two years.

After several drafts of each survey, the surveys were approved by the Technical Panel in January 2025. The final surveys can be found in Appendix H.

2.7 Task 7: Conduct Surveys

The South Dakota Department of Transportation (SDDOT) conducted a statewide survey of residents and key customer groups from February-March 2025. The methodology for each of the two surveys is briefly described below.

2.7.1 Resident and Key Customer Group Survey

The resident survey was administered to a stratified sample of 1,221 South Dakota residents during February-March 2025. The sample was stratified to ensure the completion of at least 300 surveys in each of the four SDDOT regions. The survey was administered by mail, phone, email, text, and the Internet and took approximately 15 minutes to complete. The statewide sample of 1,221 respondents has a 95% level of confidence with a precision of at least $\pm 2.8\%$. The resident survey results by key customer group can be found in Appendix E. Figure 1 below shows the GIS location of respondents to the survey at the block-level.

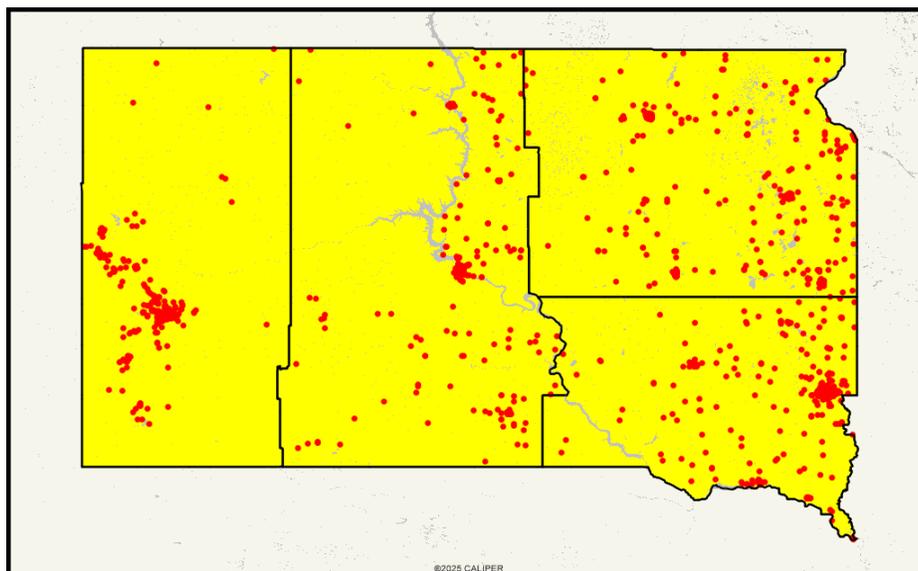


Figure 1: GIS Map Location of Respondents

In addition to residents, the survey sampled representatives from several key customer groups. The number of surveys that were completed with each customer group is provided below:

- 379 Seniors (age 65+)
- 377 Truckers/shippers
- 310 Farmers/Ranchers
- 239 Young and New Drivers
- 90 Emergency Vehicle Operators
- 42 State Legislators

2.7.2 Contractor Survey

A separate contractor survey was administered to contractors who do business with the Department. The survey was designed to gather quantitative input from contractors regarding the perceptions of working with the Department. A total of 106 contractors completed the contractor survey online. The sample of 106 contractors has a 95% level of confidence with a precision of at least +/- 9.5%. The full results from the contractor survey can be found in Appendix C.

2.8 Task 8: Present Findings to the Project's Technical Panel

In June 2025, ETC Institute conducted a webinar during which the results and analysis of all surveys were presented. The presentations focused on the results of the survey and recommendations for action. A copy of the presentation is provided in Appendix I.

2.8.1 Review the Methodology and Major Findings of the Survey

ETC Institute summarized the methodology for the surveys and then presented the major findings in each of the following areas:

- Interstate & Divided Highways
- 2-Lane & Undivided Highways
- Construction & Detours
- Highway Safety
- Information & Communication
- Customer Service
- Transportation Technology
- Transportation Priorities
- Overall Ratings/Customer Engagement

The presentation also included geographic information systems (GIS) mapping, regional analysis, and comparisons to other states, which are described in more detail below.

2.8.2 GIS Mapping

GIS Mapping was used to identify potential areas of concern based on the geographic location of the respondent's home. Survey results were geocoded to the home address of respondents to the resident survey. This technique allowed the survey data to be integrated with GIS, which allowed ETC Institute to prepare maps that show overall satisfaction with specific SDDOT services. The maps are provided in Appendix B of this report.

2.8.3 Regional Analysis

Although the primary objective of the Statewide Customer Satisfaction Survey is to evaluate the delivery of services, overall findings may camouflage important differences that exist within regions of the state. To ensure potential differences are identified when they occur, individual analysis was conducted for each of the four regions (Aberdeen, Mitchell, Pierre, and Rapid City) that constitute the SDDOT. The results for each question on the survey were tabulated by region and significant differences are noted where applicable in subsequent sections of this report. The results for each region are provided in Appendix D.

2.9 Task 9: Final Report

ETC Institute prepared a final report summarizing research methodology, findings, conclusions and recommendations, as well as copies of the survey instrument that were used. This report included, but was not limited to, the following items:

- Summary report documenting the survey purpose, methodology, major findings, conclusions, and recommendations.
- Summary of External Stakeholder Interviews
- Summary of Internal Stakeholder interviews
- Summary of Focus Groups
- Contractor Survey Findings Report
- GIS Maps of Selected Survey Results
- Survey Results by Region
- Survey Results for Key Customer Groups
- Copies of the survey instruments

2.10 Task 10: Executive Presentation

In June 2025, ETC Institute made a final presentation of the results to SDDOT's Research Review Board. The presentations focused on the results of the survey and recommendations for action. A copy of the presentation is provided in Appendix I.

3.0 SIGNIFICANT FINDINGS – RESIDENT AND STAKEHOLDER SURVEYS

The 2025 Customer Satisfaction Assessment was designed to evaluate SDDOT’s performance in 11 major areas:

- Interstate & Divided Highways
- 2-Lane & Undivided Highways
- Construction & Detours
- Highway Safety
- Information & Communication
- Customer Service
- Transportation Technology
- Transportation Priorities
- Overall Ratings/Customer Engagement

Significant findings for the Resident and Stakeholder surveys for each of these areas are described on the following pages.

3.1 Interstate and Rural Divided Highways

Most residents gave positive ratings for all 13 items that were assessed regarding services and features on Interstates and divided highways in South Dakota. Some of the specific findings that were related to Interstate and divided highways in South Dakota are listed below.

- Overall, 92.5% of residents indicated they were satisfied with Interstate and divided highways in South Dakota, 6.6% were neither satisfied or dissatisfied (neutral), and 0.9% indicated they were dissatisfied.
- The condition of guardrails (94%), feeling of safety while driving on interstate and rural divided highways (93%), and overall flow of traffic (92%) received the highest levels of satisfaction among the 13 items that were rated.
- Residents indicated they were least satisfied with the smoothness of the surface of highways (77%).

Trends from 2021-2025

The bar chart below shows satisfaction with interstate/highway services. Satisfaction is highest for guardrail condition (94%) and safety while driving (93%), and lowest for smoothness of highways (77%), bridge condition (80%), and pavement markings (80%). Neutral and dissatisfied responses are generally under 16%.

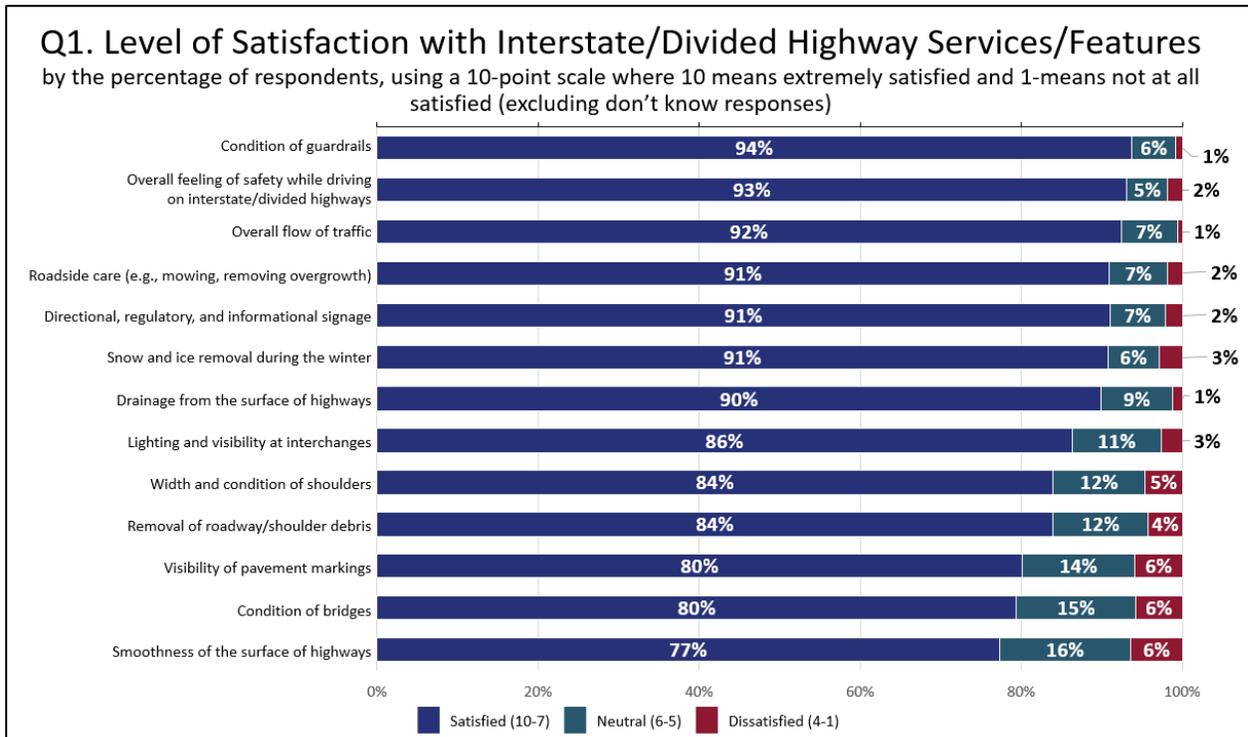


Figure 2: Interstate and Divided Highway Ratings

- Overall satisfaction with Interstate and divided highways in South Dakota increased by 6% from 86.5% in 2021 to 92.5% in 2025.
- Since 2021, satisfaction has increased in all areas. The areas with the biggest increases since were:
 - Smoothness of surface of highways (8.6%)
 - Snow and ice removal during the winter (7.0%)
 - Condition of bridges (6.2%)
 - Lighting and visibility at interchanges (5.1%)

The chart on the following page shows satisfaction with interstate/highway services in 2018, 2021, and 2025. Satisfaction is generally high across all years, with improvements in most categories from 2018 to 2025. Highest ratings in 2025 include guardrail condition (94%) and overall traffic flow (92%), while lowest are bridge condition (80%) and highway smoothness (77%).

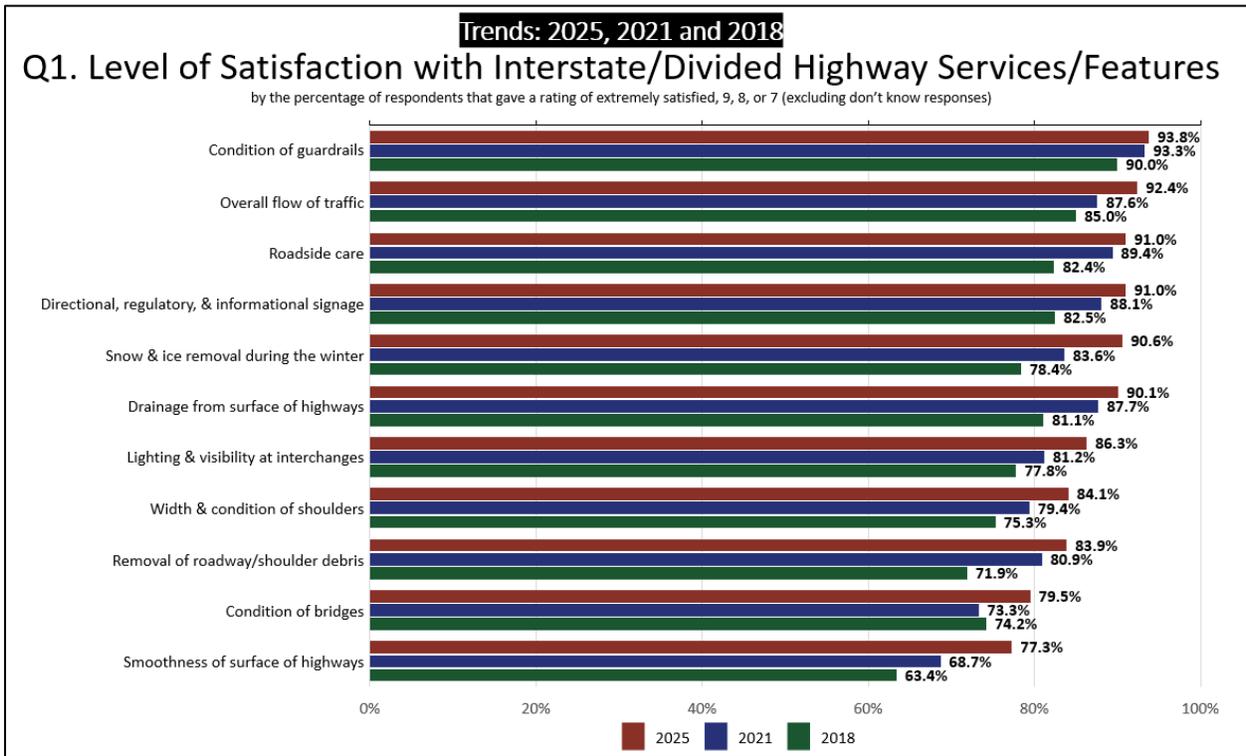


Figure 3: Satisfaction with Interstate and Divided Highway Services and Features (Trends)

Satisfaction by Key Customer Group

The table below shows the satisfaction levels among key customer groups in the top three areas of Interstate and divided highways. The totals are based on the percentage of respondents who rated the item as a 7 to 10 on a 10-point scale, where 10 means “extremely satisfied.” Appendix E has the ratings by customer group for all areas that were assessed.

Q1. Interstate and Divided Highway Services and Features			
Customer Groups	1st	2nd	3rd
Emergency Vehicle Operator	Condition of guardrails (98%)	Directional, regulatory, & informational signage (93%)	Feeling of safety while driving on highways (91%)
Farmer/Rancher	Condition of guardrails (97%)	Directional, regulatory, & informational signage (94%)	Feeling of safety while driving on highways (93%)
Senior (65+)	Feeling of safety while driving on highways (95%)	Condition of guardrails (95%)	Overall flow of traffic (93%)
State Legislators	Condition of guardrails (95%)	Feeling of safety while driving on highways (93%)	Snow and ice removal during the winter (93%)
Trucker	Condition of guardrails (94%)	Feeling of safety while driving on highways (93%)	Overall flow of traffic (92%)
Younger Drivers	Condition of guardrails (93%)	Feeling of safety while driving on highways (92%)	Drainage from the surface of highways (92%)
Overall	Condition of guardrails (94%)	Feeling of safety while driving on highways (91%)	Overall flow of traffic (90%)

Table 1: Interstate and Divided Highway Services and Features Customer Groups

3.2 State and U.S. Two-Lane and Undivided Highways

Residents generally gave positive ratings for each of the 13 items that were assessed regarding services and features on two-lane and undivided highways in South Dakota. Some of the specific findings that were related to two-lane and undivided highways in South Dakota are listed below.

- Overall, 81.3% of residents indicated they were satisfied with two-lane and undivided highways in South Dakota, 14.6% were neither satisfied or dissatisfied (neutral), and 4.1% were dissatisfied.
- The condition of guardrails (89%), the overall flow of traffic (86%) and directional, regulatory, and informational signage (84%) received the highest levels of satisfaction among the 13 items that were rated on two-lane and undivided highways.
- The services/features with the lowest satisfaction ratings were the visibility of pavement markings (70%), the width and condition of shoulders (66%), and the smoothness of the surface of the highways (64%).

The chart below shows satisfaction with US Two Lane and undivided highway services. Satisfaction is highest for guardrail condition (89%) and overall flow of traffic (86%), and lowest for width and condition of shoulders (66%), and smoothness of the surface of highways (64%). Neutral and dissatisfied responses are generally under 26%.

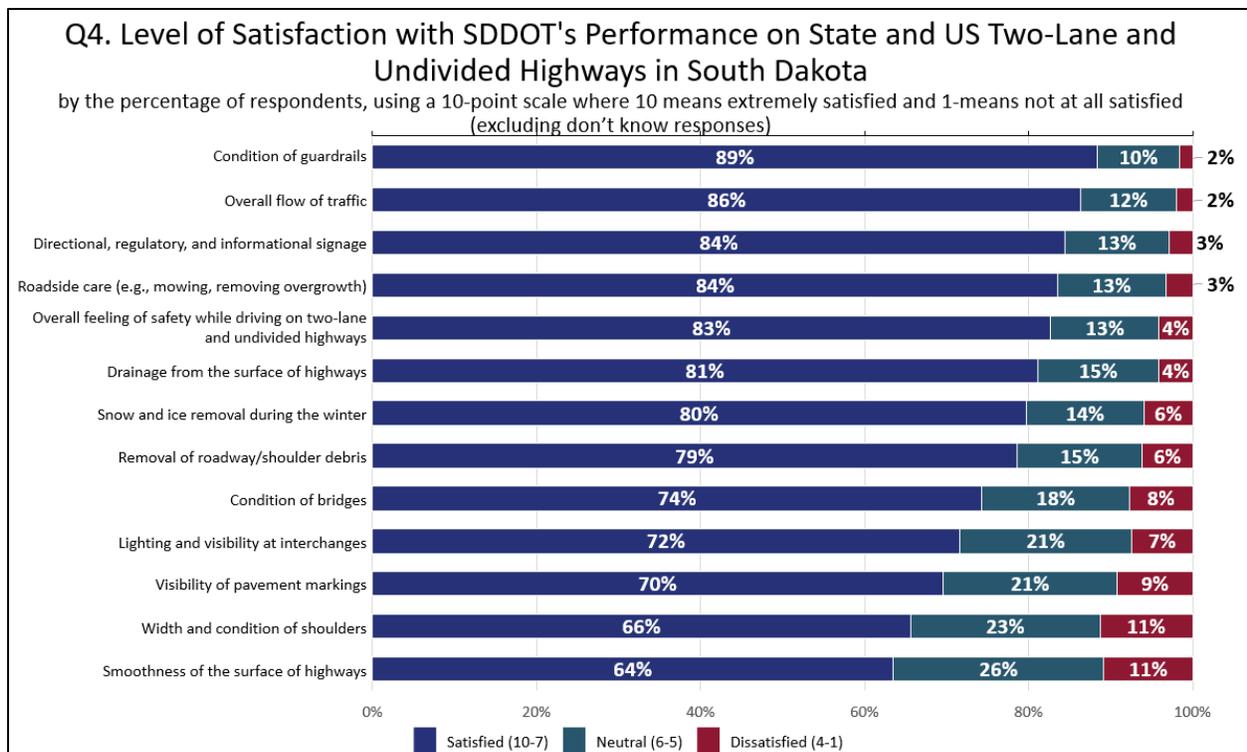


Figure 4: Two-Lane and Undivided Highway Ratings

Trends from 2021-2025

- Overall satisfaction with two-lane and undivided highways in South Dakota increased by 9.5% since 2021, and 21.4% since 2018.
- Since 2021, satisfaction increased by at least 5% or more in the following nine areas:
 - Condition of bridges (11.3%)
 - Lighting and visibility at interchanges (8.2%)
 - Drainage from surface of highways (8.1%)
 - Width and condition of shoulders (7.3%)
 - Smoothness of surface of highways (6.9%)
 - Overall flow of traffic (6.4%)
 - Snow and Ice removal (6.3%)
 - Directional, regulatory, and informational signage (5.6%)
 - Removing roadway and shoulder debris (5.5%)

The chart below shows satisfaction with US two lane and undivided highway services in 2018, 2021, and 2025. Satisfaction is generally high across all years, with improvements in most categories from 2018 to 2025. Highest ratings in 2025 include guardrail condition (89%) and overall traffic flow (86%), while lowest are width and condition of shoulders (66%) and highway smoothness (63%).

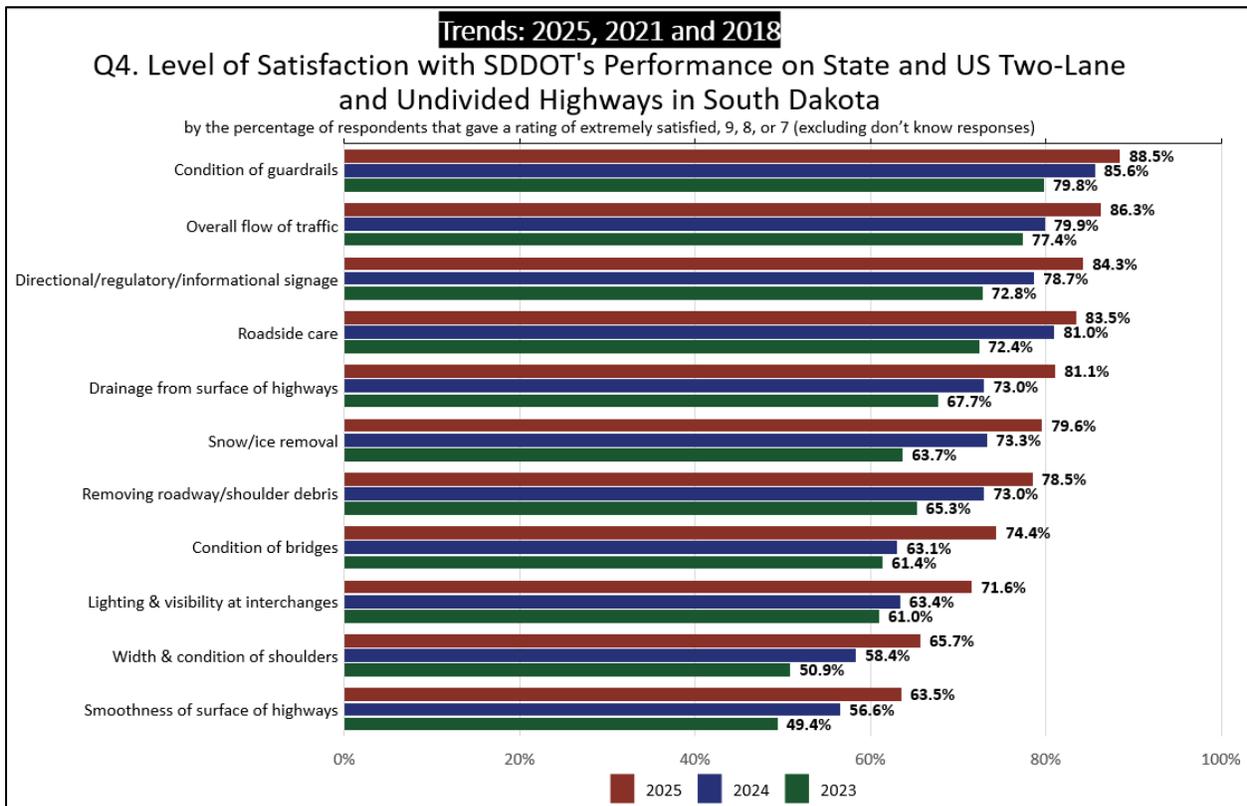


Figure 5: Two-Lane and Undivided Highway Ratings (Trends)

Satisfaction by Key Customer Group

The table below shows the satisfaction levels among key customer groups in the top three areas of two-lane and undivided highways. The totals are based on the percentage of respondents who rated the item as a 7 to 10 on a 10-point scale, where 10 means “extremely satisfied.” Appendix E has the ratings by customer group for all areas that were assessed.

Q4. State and U.S. Two Lane and Undivided Highways			
Customer Groups	1st	2nd	3rd
Emergency Vehicle Operator	Condition of guardrails (83%)	Overall flow of traffic (83%)	Directional, regulatory, & informational signage (80%)
Farmer/Rancher	Condition of guardrails (89%)	Roadside Care (85%)	Overall flow of traffic (84%)
Senior (65+)	Overall flow of traffic (89%)	Condition of guardrails (88%)	Feeling of safety while driving on highways (87%)
State Legislators	Overall flow of traffic (93%)	Condition of guardrails (84%)	Snow and ice removal during the winter (94%)
Trucker	Condition of guardrails (86%)	Overall flow of traffic (84%)	Directional, regulatory, & informational signage (83%)
Younger Drivers	Condition of guardrails (90%)	Overall flow of traffic (88%)	Directional, regulatory, & informational signage (87%)
Overall	Condition of guardrails (89%)	Overall flow of traffic (86%)	Directional, regulatory, & informational signage (84%)

Table 2: Satisfaction with Two-Lane and Undivided Highway Services and Features among Key Customer Groups

3.3 Construction and Detours

Nearly all respondents (95.7%) indicated they drove through a work zone on a highway in South Dakota during the past year. Among those who had driven through a work zone, most (82.0%) indicated they think the length of time they are delayed by work zones on highways in South Dakota are either “always” or “usually” acceptable, which was an increase of 3.4% since 2021. Residents in the Pierre Region were the most likely to think the length of time they are delayed by work zones on highways was “always” or “usually” acceptable. Residents of the Mitchell Region were the least likely to think the length of time they are delayed by work zones on highways was “always” or “usually” acceptable. The table below shows the percentage of residents, by region, that think the length of time they are delayed by work zones on highways was “always” and “usually” acceptable, all regions besides Mitchell are above 82%.

Q7a. Do you think the length of time you are delayed by work zones on highways in South Dakota is acceptable?				
	Aberdeen	Mitchell	Pierre	Rapid City
Sum of Always% and Usually%	82.6%	74.1%	85.9%	85.4%

Table 3: Length of Time Delayed by Work Zones on Highways Always/Usually Acceptable by Region

The majority (74.4%) of residents think SDDOT completes highway construction projects in a reasonable amount of time, 25.6% of residents do not think SDDOT completes highway construction projects in a reasonable amount of time. Residents in the Pierre Region were the most likely to think SDDOT completes highway construction projects in a reasonable amount of time. Residents of the Rapid City Region were the least likely to think SDDOT completes highway construction projects in a reasonable amount of time. The table below shows the percentage of residents who think SDDOT completes highway construction projects in a reasonable amount of time by region.

Q7b. Do you think SDDOT completes highway construction projects in a reasonable amount of time?				
	Aberdeen	Mitchell	Pierre	Rapid City
Yes%	73.5%	73.1%	81.6%	69.5%
No%	26.5%	26.9%	18.4%	30.5%

Table 4: SDDOT Completion of Construction Projects on Time

3.4 Highway Safety

Residents indicated that making safe improvements to highways is one of the top improvements that is important for SDDOT to fund over the next five years. Some of the specific findings related to highway safety are listed below.

- Overall, 93% of residents feel safe on State, U.S., and Interstate highways.
- Compared to five years ago, 43% of residents think State, U.S., and Interstate highways are either “much safer” or “safer”; 43.6% think they are about the same, 10.3% think they are somewhat more dangerous, and 2.8% think they are much more dangerous.

- Over three-quarters (77.3%) of residents feel safe when driving through work zones on State, U.S., and Interstate highways in South Dakota. The map below shows this by showing all regions agreeing.

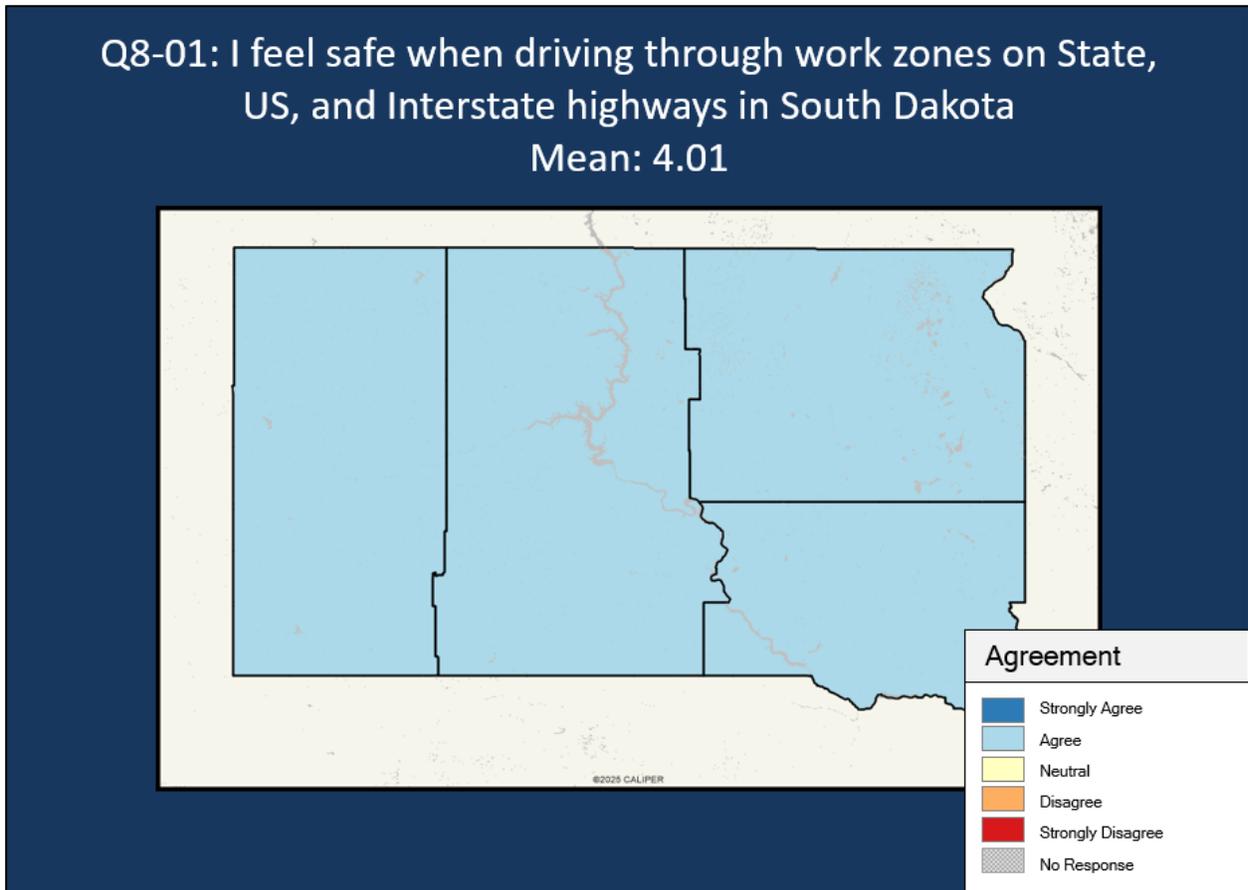


Figure 6: Regional Highway Safety Ratings

- Over sixty percent (64.5%) of residents “sometimes” engage in activities like browsing, texting, talking on the phone while driving.
- However, over half (56.0%) of residents indicated that they “usually” or “always” see other drivers engaging in distracting behavior while driving.
- Most (85.7%) of residents either “strongly agree” or “agree” that SDDOT does a good job of providing signage in work zones.

- Eighty percent (80.3%) of the residents surveyed thought that “distracted drivers” was the biggest safety concern on highways, 68% thought it was “rough roads,” and 62.5% thought it was “plowing during snow conditions.” The chart below shows how much of a concern safety items are. Concern is highest for distracted drivers and rough roads, and lowest for inadequate signage, and vegetation and crops in the right-of-way.

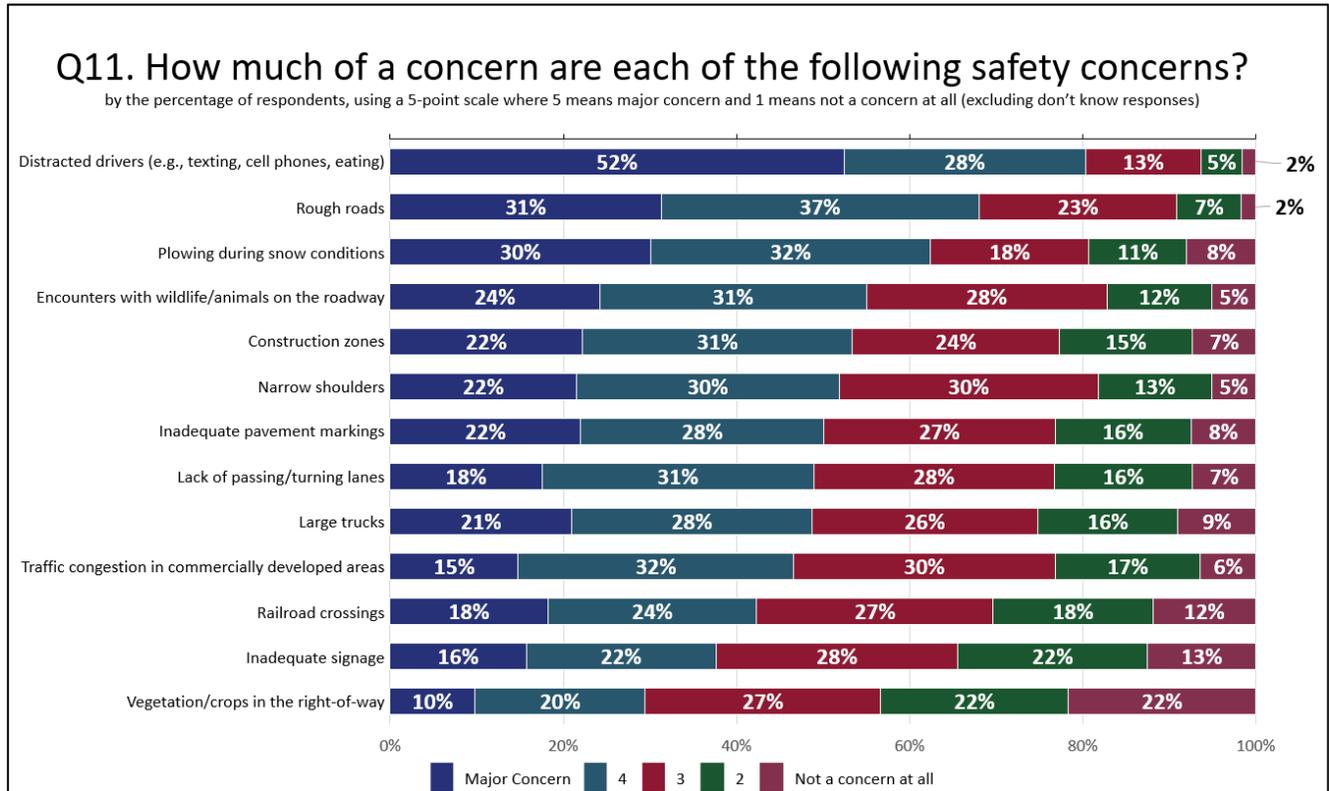


Figure 7: Biggest Safety Problems on State Highways

3.5 Information and Communication

In order to assess the effectiveness of communication programs that are currently in place, the research team included several questions about communication. Some of the major findings in this area are listed on the following page.

- Satisfaction with SDDOT’s effort to keep residents informed about road conditions has continued to increase since 2021. SDDOT’s efforts to alert residents about delays and alternative routes caused by construction projects has increased 8.7% since 2021. The chart below shows satisfaction with communication from SDDOT in 2018, 2021, and 2025. Satisfaction is generally high across all years, with improvements in most categories from 2018 to 2025. Ratings in 2025 include SDDOT’s efforts to keep residents informed about road conditions (86.4%) SDDOT’s overall efforts to keep residents informed (82.5%), and SDDOT’s efforts to alert residents of delays and alternate routes caused by highway construction projects (81.0%).

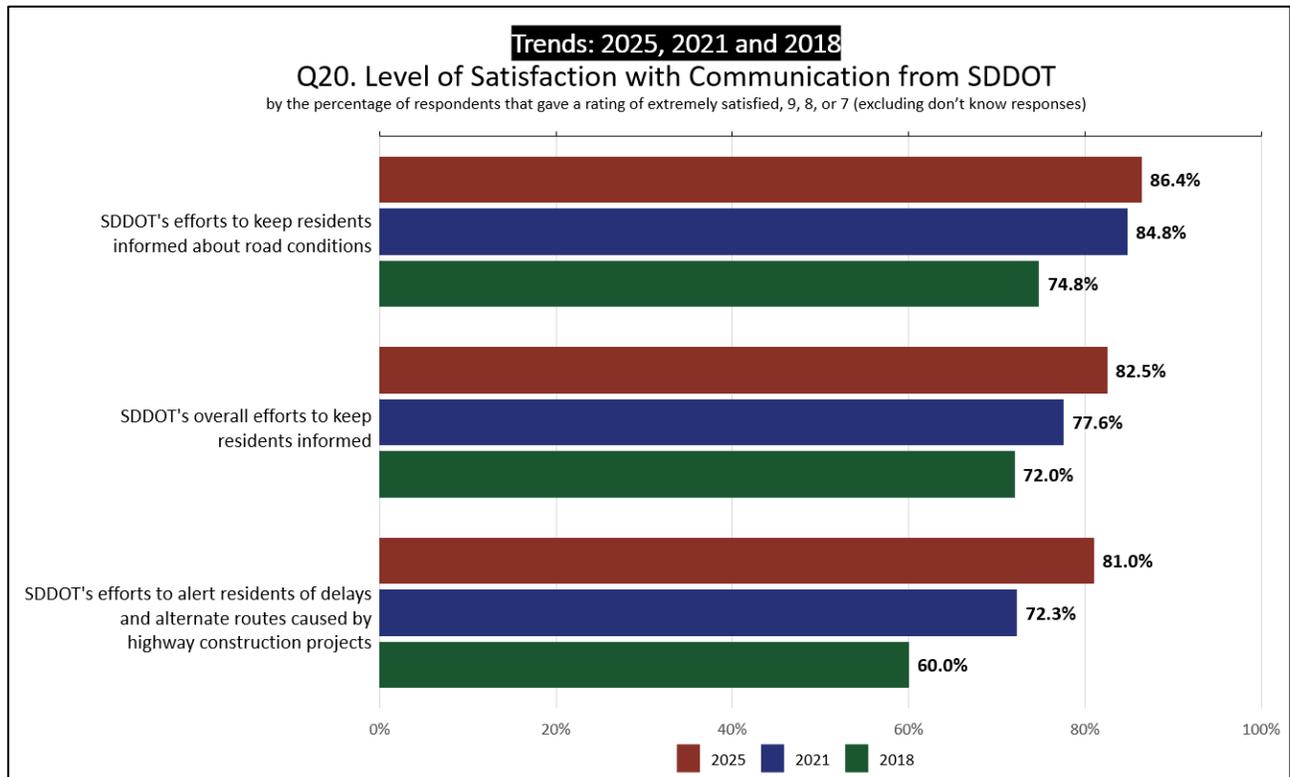


Figure 8: Satisfaction with Communication from SDDOT (Trends)

- Most (88.9%) of residents indicated that road conditions during winter and other seasons is the most important transportation-related information to them. Followed by information about ongoing construction projects (58.1%) and road closures/re-openings (57.9%).
- Twenty-three percent (23.1%) of residents prefer SDDOT to share information to them through text or online through websites (16.4%).
- The majority (65.4%) of residents have seen SDDOT message boards along highways.
- Almost all residents are satisfied with the information sources that SDDOT uses: the information with the highest ratings of satisfaction were 511sd.org (92.0%) and SDDOT message boards along highways (91.3%).

3.6 Customer Service

Fourteen percent (14.4%) of South Dakota residents indicated that they had contact with SDDOT employees during the past two years, which was up slightly from 12.5% in 2021. Among those who had contacted SDDOT employees, 74.5% of residents indicated they were either “very satisfied” or “satisfied” with the level of customer service provided by SDDOT; 12.8% gave a “neutral” rating, 6.4% were “dissatisfied,” and 6.4% were “very dissatisfied.” The chart below shows satisfaction with services provided by the SDDOT employee who helped you most recently in 2018, 2021, and 2025. Satisfaction is generally high across all years, with ratings staying mostly the same from 2018 to 2025. Ratings in 2025 were 74.5% and in 2018 they were 73.0%.

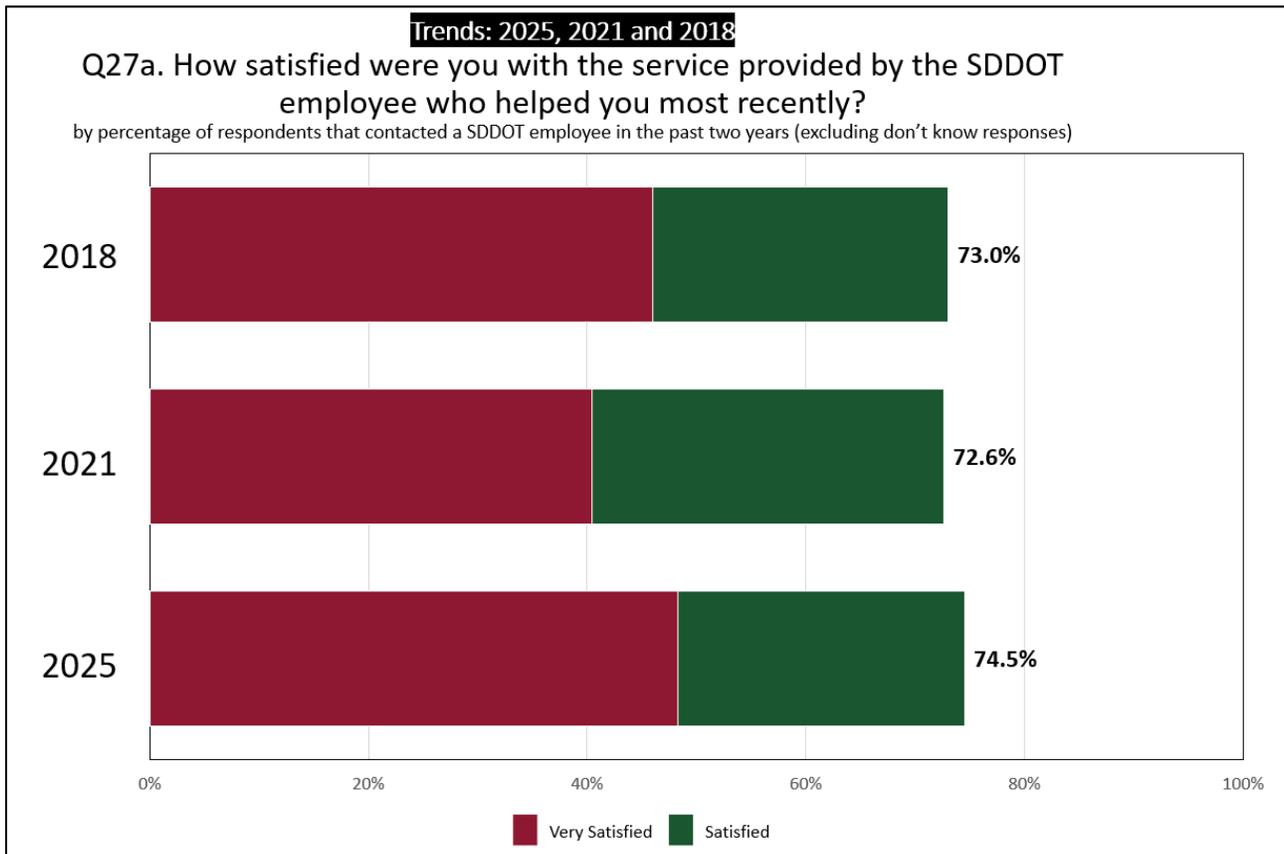


Figure 9: Satisfaction Ratings of SDDOT Customer Service (Trends)

3.7 Transportation Technology and Other Issues

Some of the specific findings related to attitudes towards transportation in South Dakota are listed below.

- Twenty-six percent (25.9%) of residents think it is either “very important,” or “important” to accommodate the use of electric vehicles and electric vehicle charging stations in South Dakota.
- Nineteen percent (19.3%) of residents think it is either “very important,” or “important” for the State to support developing infrastructure needed for connected and autonomous vehicles.

The chart below shows the importance of planning for future transportation needs in South Dakota. Importance was generally low across all areas including accommodating the use of electric vehicles (25.9%) and supporting the development of infrastructure for autonomous vehicles and aerial drones. Not important ratings were generally high at least 34%.

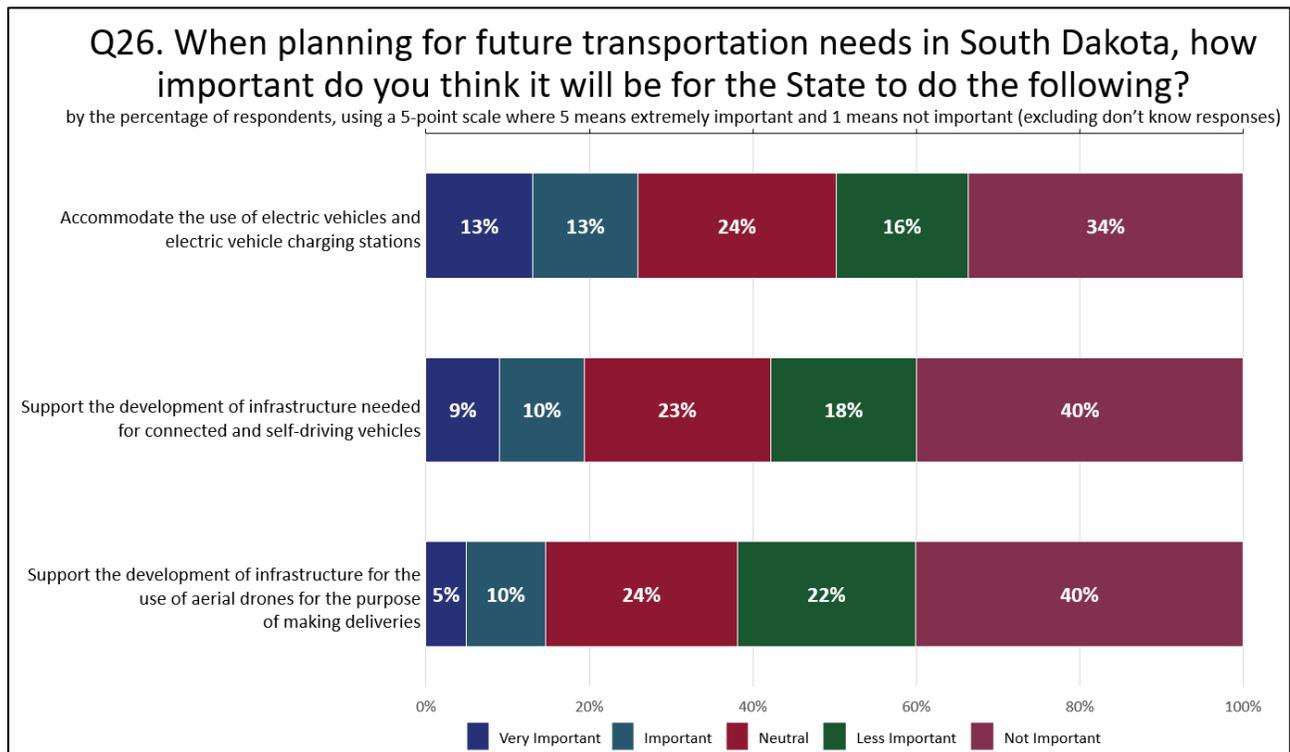


Figure 10: Importance of Future Transportation Needs

Plans for Electric Vehicle Ownership

Only five percent (5.3%) of South Dakota residents indicated that they plan to purchase an electric vehicle in the next five years, this was a decrease of 5.9% since 2021. Young adults between the ages of 18 to 34 years and adults 35-44 were the most likely to buy an electric vehicle over the next 5 years. The chart below shows only 5% of respondents are considering the purchase of an electric vehicle and that younger age groups are more likely to consider the purchase of an electric vehicle.

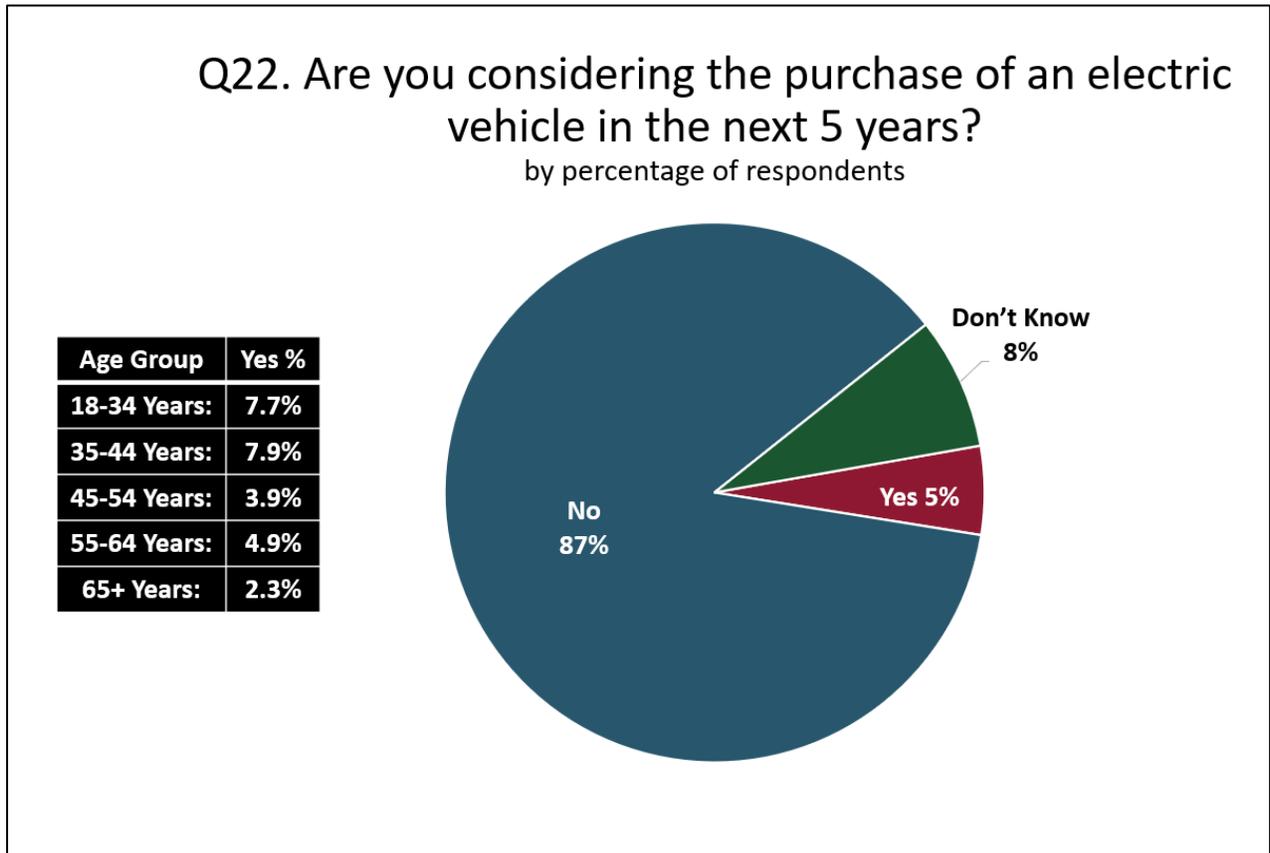


Figure 11: Plans to Purchase an Electric Vehicle in the Next Five Years

Plans to Work from Home

- Thirty-eight percent (37.8%) of residents who are employed anticipate working from home in the future at least one day per week, which is a 6.2% decrease since 2021. The pie chart to the right shows 62.2% of respondents anticipate never working from home in the future. The chart below shows 62.2% of respondents anticipate never working from home in the future.

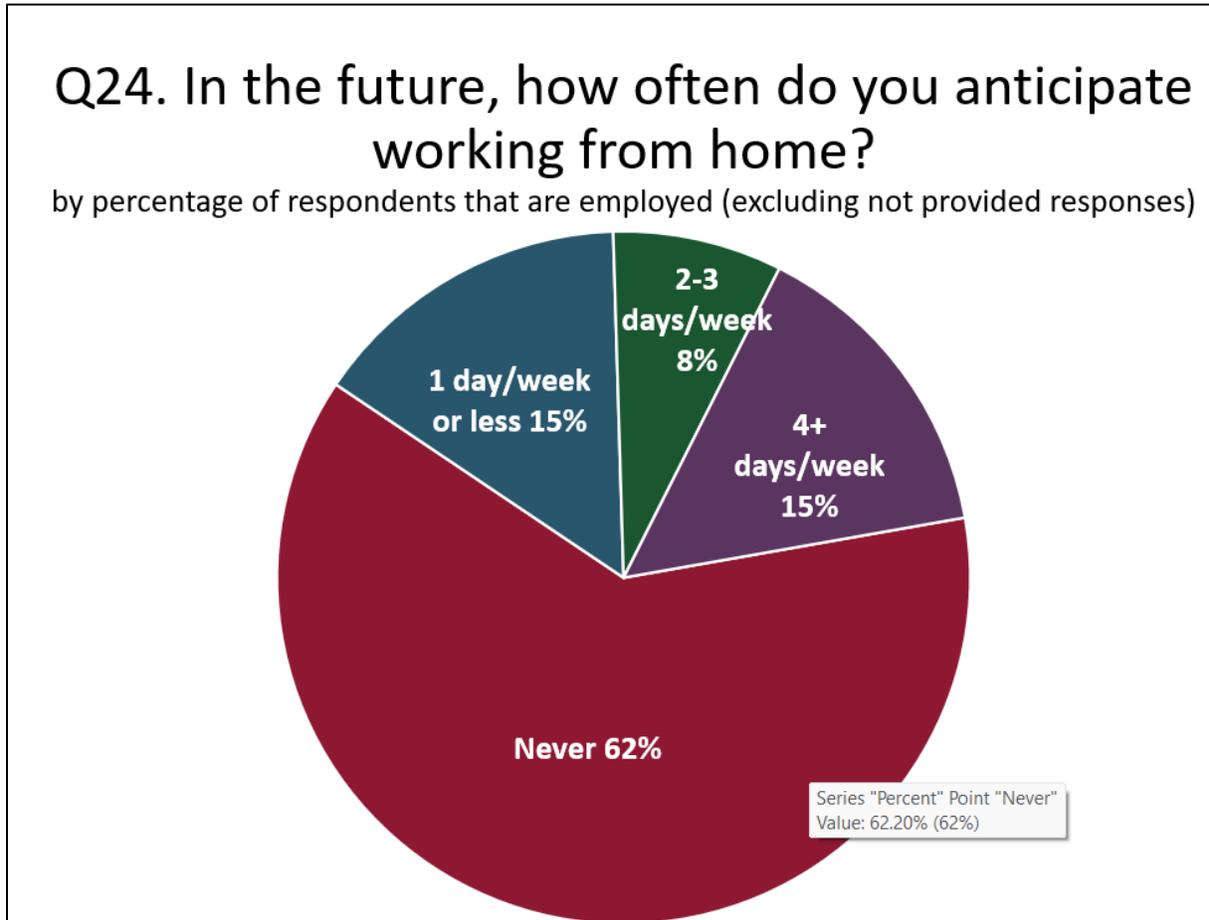


Figure 12: Residents Anticipating Working from Home in the Future

Perceptions of Rest Areas

- Satisfaction with South Dakota rest area(s) increased by 4.7% from 88.4% in 2021 to 93.1% in 2025 as shown in the figure below. The chart below shows the increase in satisfaction from 81% in 2018 to 93.1% in 2025

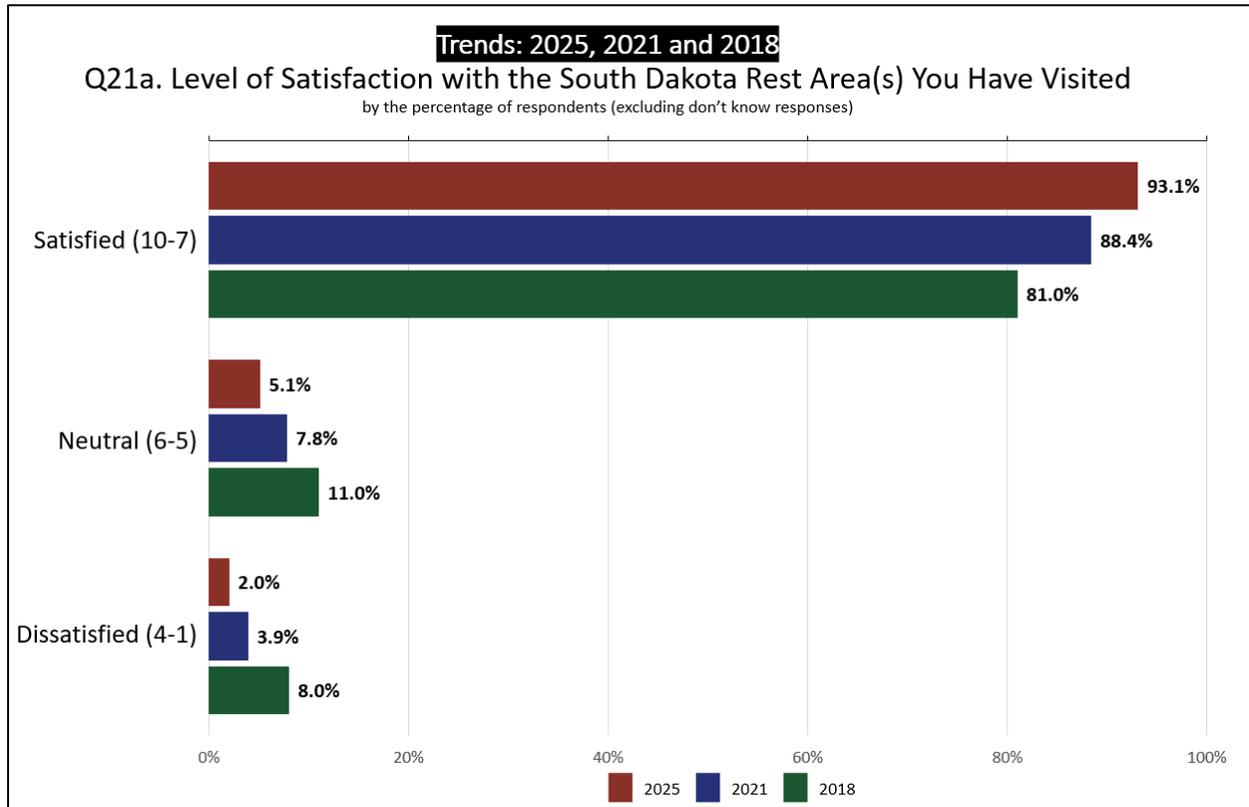


Figure 13: Satisfaction with Rest Areas (Trends)

Perceptions of Roundabouts

- Sixty-four percent (64.0%) of residents were satisfied with the roundabouts they experienced. Eighty-five percent (85.0%) of residents have driven through roundabouts during the past year, which is an increase of 11.1% since 2021. The pie chart below shows that among respondents, 64.0% were satisfied, 14.4% were neutral, and 21.7% were dissatisfied.

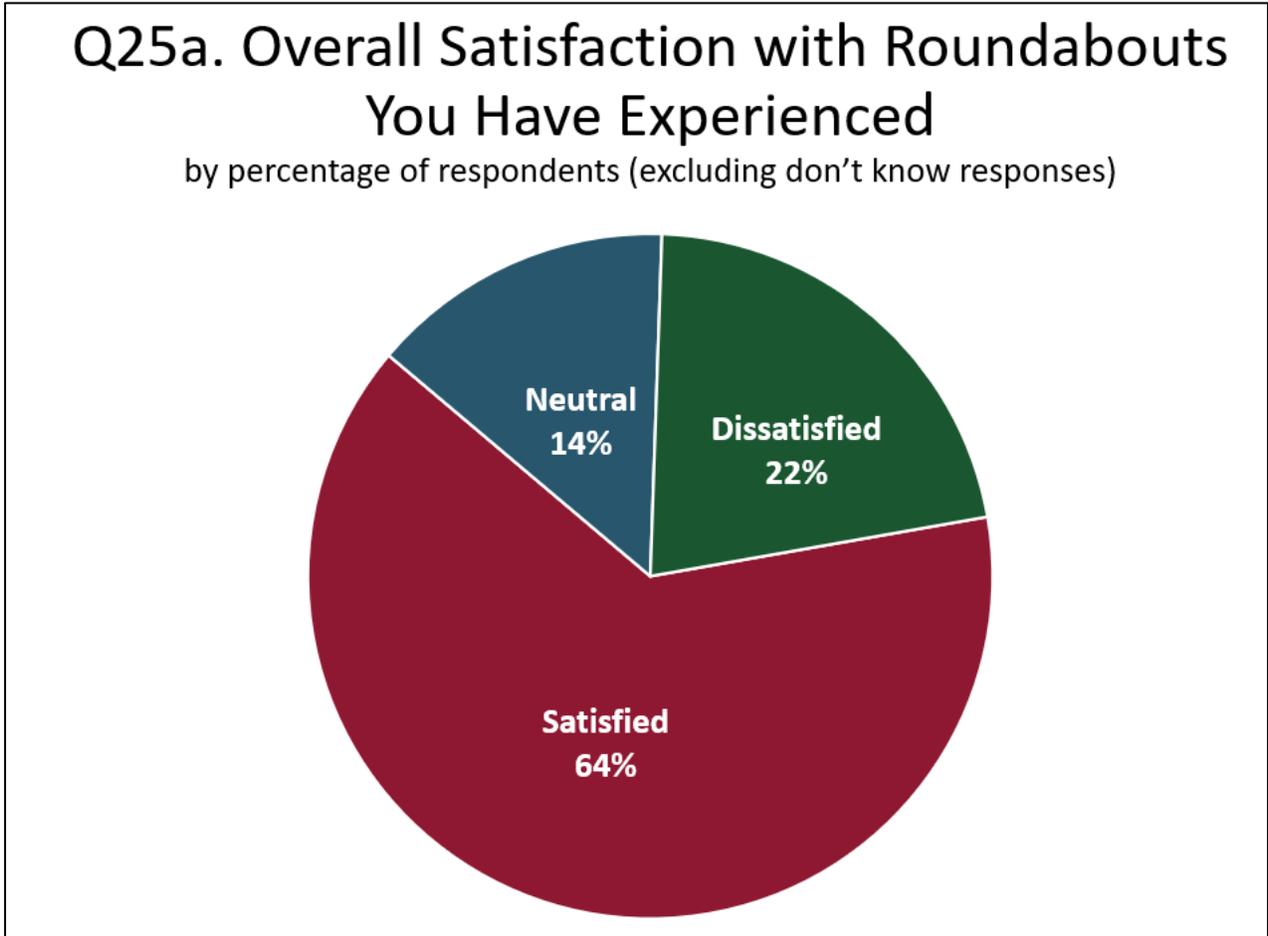


Figure 14: Satisfaction with Roundabouts Used

3.8 Transportation Priorities

To help SDDOT leaders set priorities for improvement to the State’s transportation system, the survey included a series of questions that asked residents to rate the importance of various transportation priorities. The top four improvements that residents think is most important for SDDOT to fund over the next five years, based on the percentage of residents who picked the item as one of their top three priorities, are listed below.

- Repairing and maintaining existing highways (77.7%)
- Making safety improvements to highways (51.7%)
- Expanding transportation services for seniors and persons with disabilities (39.8%)
- Adding capacity to highways to reduce congestion (27.4%)

The chart below shows the top priorities for SDDOT funding. Most important were repairing highways (77.7%), safety improvements (51.7%), expanding transportation for seniors and persons with disabilities (39.8%), and adding capacity to highways to reduce congestion (27.4%). Lower priorities included public transit (22.0%), airports (13.9%), and other options under 12.5%.

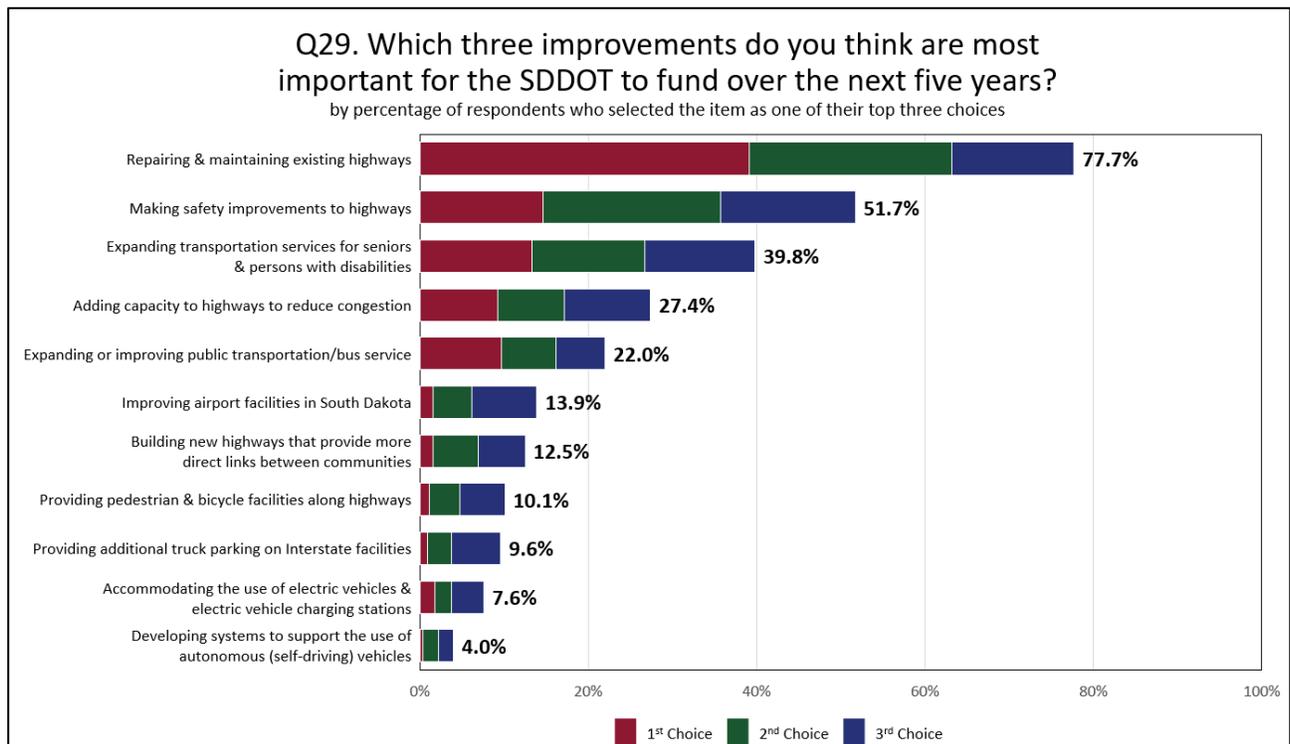


Figure 15: Transportation Priorities that Should Receive the Most Emphasis

3.9 Overall Ratings and Customer Engagement

At the end of the survey, the research team included several questions to assess overall perceptions and satisfaction with SDDOT and customer engagements. Some of the major findings are listed below.

- Compared to five years ago, 33.4% of residents think the current quality of SDDOT services are “better,” 54.1% think they are “about the same,” 2.3% think they are “worse,” and 10.1% did not know.
- Twenty-one percent (21.3%) of residents rated the value of services provided by SDDOT as “excellent,” 55.0% gave the value a “good” rating, 17.6% gave the value an “OK” rating, 1.4% gave the value a “low” rating, and 4.7% did not have an opinion.
- Overall satisfaction with SDDOT increased from 80.5% in 2021 to 84.4% in 2025 as shown in the chart below.

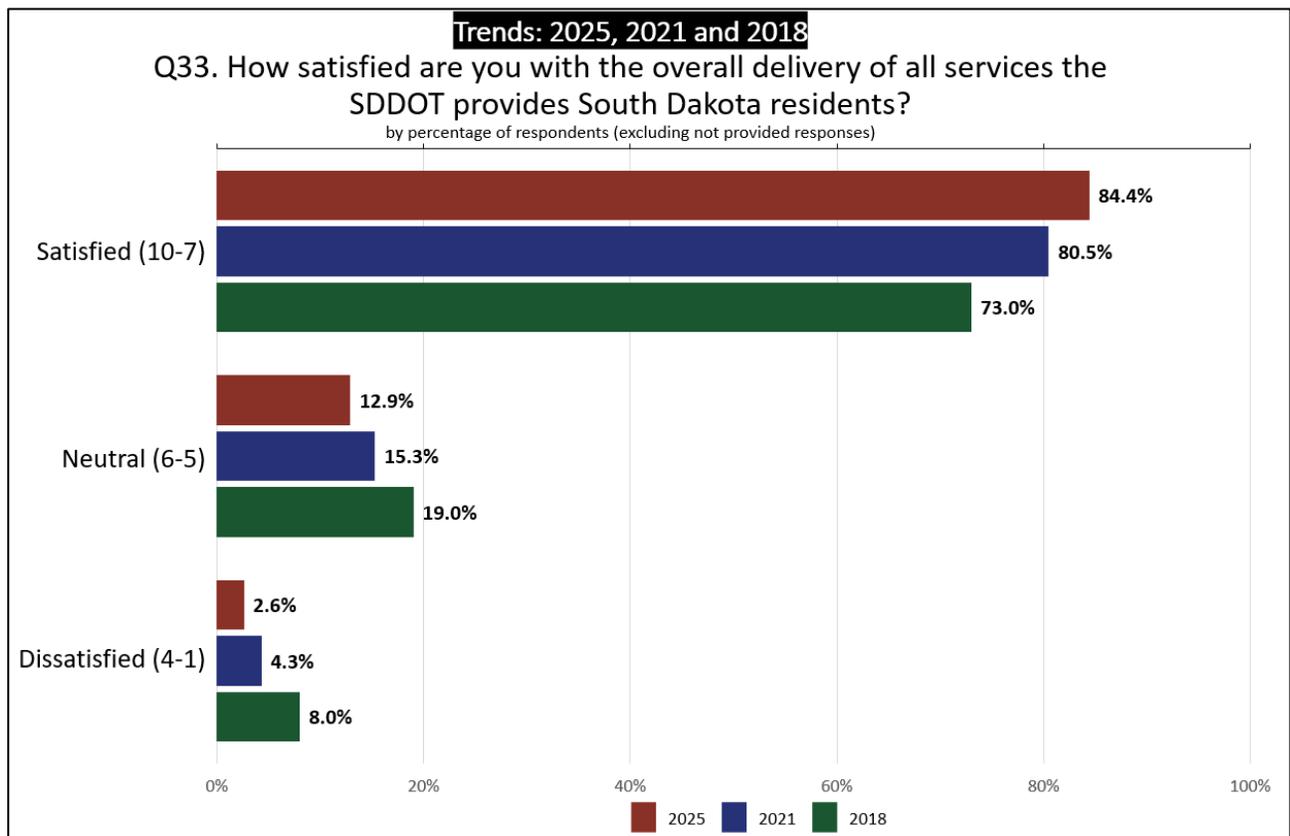


Figure 16: Overall Satisfaction with SDDOT

Customer Engagement Ratings

- Seventy-four percent (73.7%) of residents agreed with the statement that “SDDOT has employees who really care about the public” and seventy-three percent (72.8%) agreed that “SDDOT treats people with respect.” This was 10 times the number of people who did not agree with each statement (7% each or more).
- Two-thirds of residents are “proud” of the way SDDOT serves the State’s transportation needs and think that “SDDOT is an organization (they) can trust”.
- 66.9% of those surveyed think SDDOT is one of the best governmental organizations in South Dakota.
- Over two-thirds (75.9%) of residents think SDDOT places a high priority on public safety.

The chart below shows the level of agreement with various customer engagement statements. Agreement was generally high for all the statements. Agreement is highest for “SDDOT places a high priority on public safety.”

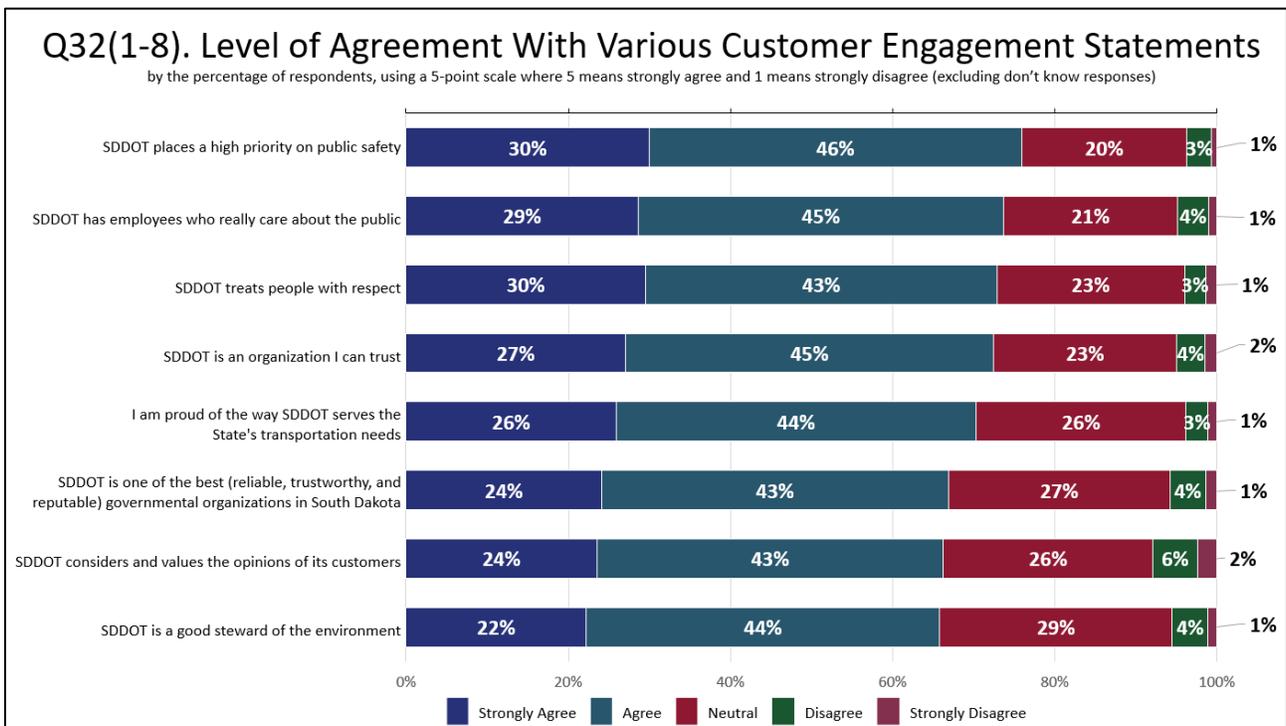


Figure 17: Customer Engagement-Related Ratings

4.0 CONCLUSIONS

The following conclusions were made based upon the results of the 2025 Statewide Customer Satisfaction Survey. The supporting evidence accompanies each conclusion.

4.1 Overall Satisfaction with the State’s Transportation System Continues to Increase and Respondents See Value in the System

Between 2018 and 2021 overall satisfaction (the sum of 10, 9, 8, and 7 responses on a 10-point scale where 10 is satisfied and 1 is dissatisfied) with Interstate and Divided Highways increased 10 percentage points, and from 2021 to 2025 satisfaction increased another 6 percentage points (76.5% in 2018, 86.5% in 2021, and 92.5% in 2025). Additionally, from 2018 to 2021 overall satisfaction with State and Two-Lane Undivided Highways increased 12 percentage points, and another 9.5 percentage points between 2021 and 2025 (59.9% in 2018, 71.8% in 2021, and 81.3% in 2025). In 2025, 76.3% of respondents rated SDDOT’s services as either a “good” or “excellent” value. This rating is significantly higher than the North Central Region average of 45.9%.

- Overall satisfaction with Interstate and divided highways increased 6% since 2021, and satisfaction improved for 11 of the 13 specific attributes of Interstate and Divided highways that were assessed.
- Overall satisfaction with two-lane/undivided highways increased 9.5% since 2021, and satisfaction improved in 11 of the 13 specific attributes of two-lane/undivided highways that were assessed.

4.2 SDDOT Outperforms Regional Peers in the Delivery of Transportation Services

ETC Institute administered a benchmarking survey to residents of the North Central Region of the United States. The purpose of the survey was to provide a benchmark for objectively assessing SDDOT’s performance. The survey was administered to a random sample of at least 70 residents in each of the following seven states: North Dakota, Wyoming, Nebraska, Minnesota, Iowa, and Montana. The survey questions were identical to the questions asked to South Dakota residents and the timing of the survey was the same (February-March 2025). Among the 64 performance-related questions on the benchmarking survey, SDDOT outperformed the average for the North Central Region in all but two areas. In fact, SDDOT’s ratings were at least 10% higher than the North Central Region in 55 of 64 areas. The areas for which the results for SDDOT were the highest above the North Central Region are provided in the table on the following page.

Items with the Highest Difference	%SDDOT - %North Central Average
Overall satisfaction with Interstate and Rural Divided highways in the State	38.1%
SDDOT places a high priority on public safety	35.1%
I am proud of the way SDDOT serves the State's transportation needs	35.0%
Overall Satisfaction with Two-Lane and Undivided Highways in the State	34.7%
SDDOT is a good steward of the environment	33.7%
Overall feeling of safety while driving on two-lane and undivided highways	30.9%
SDDOT treats people with respect	30.5%
Overall, how would you rate the value of the services provided to you by the State DOT	30.4%
How satisfied are you with the overall delivery of all services the State DOT provided its' citizens?	29.6%

Table 5: SDDOT Satisfaction Ratings Compared to the Regional Average

4.3 SDDOT Provides Excellent Customer Service

Seventy-five percent (74.5%) of the residents surveyed who had contacted SDDOT during the past year indicated they were either “very satisfied” (48.3%) or “satisfied” (26.2%) with the customer services provided by the SDDOT employee who helped them most recently. Only 12.8% of residents indicated they were “dissatisfied” or “very dissatisfied” which is down 2 points from 2021.

4.4 Overall Satisfaction Work Zone Management Is a Strength

Nearly all respondents (95.7%) to the statewide survey indicated they have driven through any work zones on state, US, or interstate highways in South Dakota. In 2018, 71.6% of respondents indicated that the length of time they are delayed by work zones on highways is “always” or “usually” acceptable. That number increased to 78.6% in 2021 and in 2025 82% of respondents indicated that the length of time they are delayed by work zones on highways is “always” or “usually” acceptable. Additionally, 74.4% of respondents believe SDDOT completes construction projects in a reasonable amount of time which is up significantly from 59.8% in 2021 and 57% in 2018.

4.5 Overall Satisfaction with Contractors Has Improved

The percentage of contractors who rated the value of services provided by SDDOT as “good” or “ok” increased from 83% in 2021 to 91.5% in 2025. Only 8.5% of contractors thought SDDOT provided “low” value. Seventy-eight percent (77.6%) of the contractors surveyed think that the current quality of SDDOT services is “better” or “about the same” compared to five years ago.

Overall satisfaction with SDDOT’s administration of the State’s construction program increased from 65.3% in 2021 to 73.9% in 2025. Among 19 specific areas that were assessed, satisfaction increased in 16 of the 19 areas. The chart below shows overall satisfaction with SDDOT's overall administration of the construction program from 2018 to 2025. Satisfaction has gone from 57% in 2018 to 65.3% in 2021, and to 73.9% in 2025.

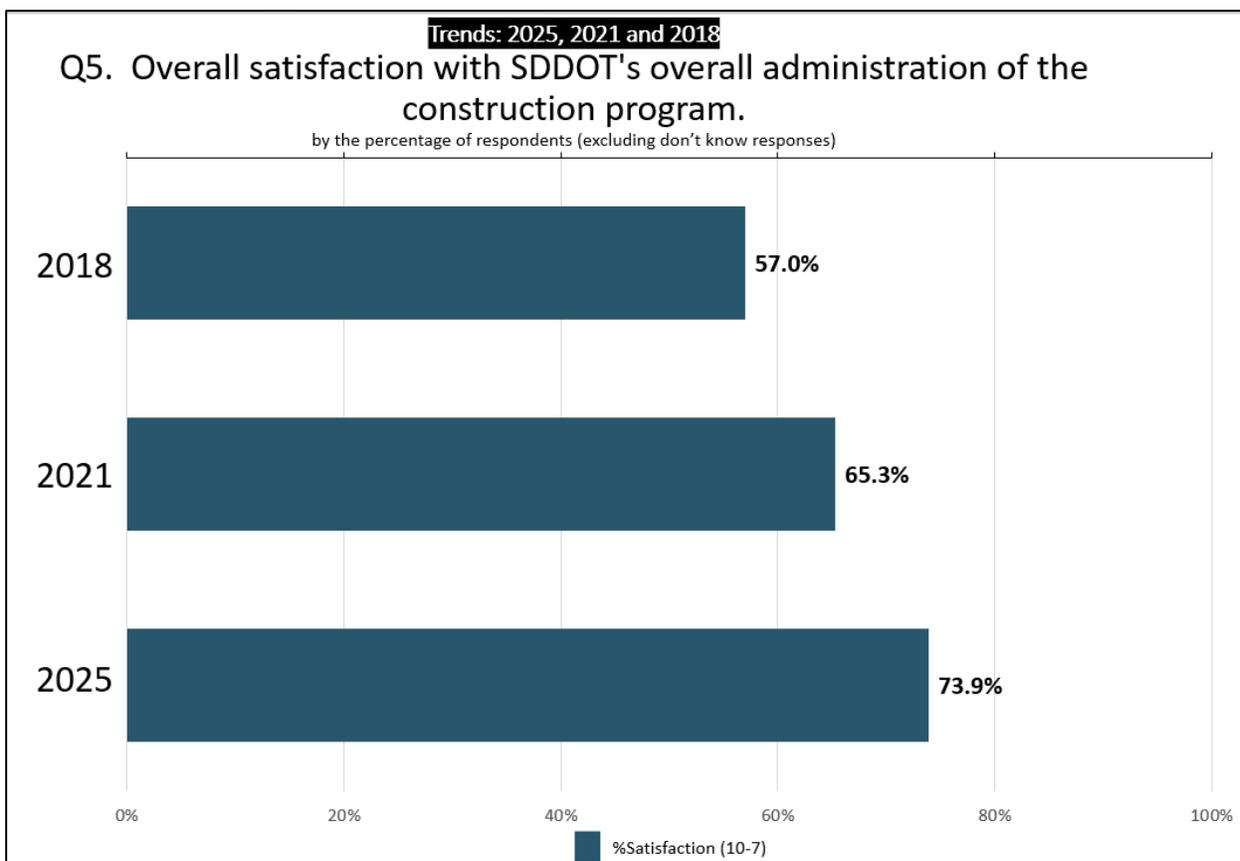


Figure 18: Satisfaction with SDDOT’s Construction Program (Trends)

Areas that improved by more than 10% Since 2021

- SDDOT's electronic bid letting system is convenient and efficient to use (+14.6%)
- SDDOT provides adequate time for contractors to complete projects (+14.6%)
- SDDOT does a good job of explaining the reasons for its decisions (+11.0%)
- SDDOT does a good job enforcing traffic control requirements and ensuring a safe environment for the public, SDDOT staff, and contractors (+10.2%)

Areas that declined Since 2021

- The amount of paperwork required by SDDOT is reasonable (-3.1%)
- SDDOT provides opportunity for contractors to suggest alternative approaches during construction (-2.5%)
- SDDOT inspectors with whom I have worked are adequately trained (-2.4%)

4.6 SDDOT's Efforts to Improve Communication Are Working

Satisfaction with SDDOT's effort to keep residents informed about road conditions has increased 1.6% since 2021 and over 11.6% since 2018. Satisfaction with SDDOT's efforts to alert residents about delays and alternative routes caused by construction projects has increased 8.7% since 2021. Overall satisfaction with SDDOT's efforts to keep the public informed increased by 4.9% since 2021. The percentage of residents who report using SDDOT's website increased from 29% in 2018 to 44.7% in 2025. The percentage of respondents who report using SDDOT 511 app for mobile phones/tablets increased from 31% in 2018 to 40% in 2025.

4.7 Residents Feel Safer Driving on State Highways Than They Did in 2021

Forty-three percent (43.3%) of the residents surveyed indicated that South Dakota highways were "much safer" (11.9%) or "somewhat safer" (31.4%) than they were five years ago. Rough roads and distracted drivers are the top safety priorities for residents, but residents are more concerned about narrow shoulders than they were in 2021.

4.8 SDDOT Should Plan for Changes to Transportation Needs that are Being Caused By Changes in Technology and Work From Home Lifestyles

Residents throughout the state support planning for the use of electric vehicles, but not all residents are ready to personally adopt the technology. Only five percent (5.3%) of all residents surveyed indicated that they plan to buy an electric vehicle in the next five years. The percentage was highest among 18–44-year-olds whom 15.6% indicated they planned to purchase an electric vehicle in the next five years. Additionally, fewer residents are likely to be working from home than in 2021. Thirty-eight percent (37.8%) of those surveyed who were employed indicated that they plan to work at home at least one day per week after the pandemic, this was a decrease of 6.2% since 2021.

5.0 RECOMMENDATIONS FOR ACTION

In addition to the findings presented previously in this report, the research team developed recommendations for the Department based on the results of the 2025 Statewide Customer Satisfaction Survey. The results of this analysis are provided below.

5.1 Prioritize Surface Smoothness on All Highway Types

Road surface smoothness was ranked as the top priority for both interstate and two-lane roads but received lower satisfaction scores compared to other features. The Importance-Satisfaction Analysis indicates that improving surface smoothness across all highway types would significantly increase overall satisfaction. While other road-specific priorities exist, smoothness stands out due to its below-average satisfaction and above-average importance, making it a key focus area for improvement in 2025. Respondents identified rough roads as one of the top areas for investment, suggesting the Department of Transportation should allocate additional funding and prioritize resurfacing projects where satisfaction is lowest.

5.2 Emphasize the Condition of Bridges

In addition to road surface smoothness, bridge condition was highly valued and performed well but still ranked among the top areas needing further investment. Sustaining or increasing resources for bridge maintenance will help prevent it from becoming a higher priority for improvement in future surveys. The Department should sustain or expand resources allocated to bridge maintenance and upkeep as well as winter maintenance and the visibility of snowplows. The table below shows the Importance-satisfaction analysis done by ETC Institute; smoothness of bridges and condition of bridges are the high priority items.

Importance-Satisfaction Analysis and Rating 2025 SDDOT Customer Satisfaction Survey Interstate/Divided Highway Service and Features						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (IS .10-.20)						
Smoothness of the surface of highways	58%	1	77%	13	0.1321	1
Condition of bridges	54%	3	80%	12	0.1103	2
Medium Priority (IS <.10)						
Visibility of pavement markings	38%	4	80%	11	0.0752	3
Removal of roadway/shoulder debris	32%	5	84%	10	0.0515	4
Snow & ice removal during the winter	54%	2	91%	6	0.0511	5
Width & condition of shoulders	26%	6	84%	9	0.0413	6
Lighting & visibility at interchanges	20%	7	86%	8	0.0273	7
Roadside care	17%	8	91%	4	0.0156	8
Drainage from the surface of highways	14%	9	90%	7	0.0140	9
Directional, regulatory, & informational signage	14%	11	91%	5	0.0125	10
Overall flow of traffic	13%	12	92%	3	0.0097	11
Overall feeling of safety while driving on interstate/divided highways	14%	10	93%	2	0.0095	12
Condition of guardrails	7%	13	94%	1	0.0040	13

Table 6: Interstate and Divided Highway Services and Features I-S Ratings

5.3 Address the Distracted Driving Concern

In 2025, distracted driving was identified as the top safety concern, with 52.4% of respondents rating it a major issue. While 78.8% believe driving should have their full attention, 20.0% consider multitasking sometimes necessary. Nearly all respondents (99.1%) reported seeing other drivers engage in distracting behaviors, yet 32.4% claimed they “never” do so themselves. The Department should collaborate with public safety agencies on education and enforcement campaigns, as well as expand messaging efforts to address distracted driving.

5.4 Invest in Pavement Marking Visibility

Although pavement markings were not ranked as top priorities in the Importance-Satisfaction Analysis, the item was frequently selected as one of the top items for emphasis, over one-third of respondents identified them as one of the four areas needing the most focus over the next two years. Additionally, 50.1% of respondents rated inadequate pavement markings as a safety concern. Proactively investing in improved pavement marking visibility specifically for nighttime and winter conditions will help address this concern before it escalates into a higher priority for improvement.

5.5 Expand Communication via Preferred Channels

Overall, 82.5% of respondents are satisfied with the Department’s efforts to keep them informed, an increase from 77.6% in 2021 and 72% in 2018. In 2025, nearly three-quarters (74.0%) of residents reported experiencing SDDOT construction on highways they regularly use, and the percentage who believe their community was adequately involved in planning rose from 39% in 2018 to 52.3% in 2025. The Department should leverage the survey’s insights into the most effective communication channels to enhance outreach and education during construction projects, ensuring residents continue to feel informed and engaged – specifically focusing on SMS alerts and optimizing content across all digital platforms (511 app and website). Additionally, highway message boards remain highly effective in delivering information to residents in an on-demand way.

5.6 Continue to Increase Community Engagement in Project Planning

According to the 2025 survey, 74.0% of South Dakota residents encountered SDDOT construction on highways they regularly use within the past two years. When asked if their community was adequately involved in planning and construction, 52.3% said “yes,” 15.2% said “no,” and 32.6% were unsure. While respondents remain most interested in road conditions, the survey also identified their preferred communication channels, including text messages, websites, and social media, which the Department should leverage for key customer updates and awareness campaigns. While engagement was the subject in the survey, additional education and outreach can fill the communication or engagement need for respondents who are not interested in attending meetings or participating in public forums and would rather see options like online feedback tools or short subject-specific surveys.

5.7 Continuing to Emphasize Safety While Improving Work Zones

In 2025, 95.7% of respondents reported driving through a work zone on state, U.S., or interstate highways in the past year, and 53.4% identified construction zone safety as a concern. Although delays have decreased and most believe SDDOT completes projects in a reasonable timeframe, maintaining a strong focus on work zone safety is essential to sustaining high satisfaction with other aspects of work zone design. Continued emphasis on safe, efficient work zone practices will help preserve and build on the positive momentum in this area.

5.8 Plan for Emerging Transportation Needs

While opinions have shifted over time, the Department should continue planning for emerging transportation needs, including electric vehicles (EVs), connected technologies, and autonomous infrastructure. In 2025, 86.7% of respondents reported they are not considering purchasing an EV in the next five years, but planning should also account for regional and national trends to ensure South Dakota remains accessible to travelers. Although many of the opinions expressed personal reluctance toward EVs due to practicality or technology concerns, they recognized that EV-friendly infrastructure could positively impact the state's economy.

5.9 Develop an Implementation Plan as in Prior Years

ETC Institute recommends that the Department develop an implementation plan to publicize the results and ensure residents across the state are aware of the Department's commitment to continuous improvement and high performance.

- **Step 1:** Publicize the results of the survey
 - During the summer of 2025, SDDOT should issue press releases to the media reporting on the findings of the 2025 Customer Satisfaction Survey and announce the Department's plans to respond to the results.
- **Step 2:** Build Engagement and Promote Responsibility
 - **Short Term:** Identify and train key staff on how to analyze and understand results.
 - **Medium Term:** Identify specific ways the results can be used to improve and maintain already high levels of organizational performance.
 - **Long Term:** Assess how the results have been used to improve work unit performance as part of the performance review process.
- **Step 3:** Leverage Results to Guide Strategic Planning
 - SDDOT's clear pattern of organizational excellence can be used to create performance measures and develop additional strategies aimed at increasing satisfaction in the areas identified for improvement.
 - Ensure all leadership are familiar with the results of the 2025 survey as they relate to the performance measures.

- **Step 4:** Initiate another assessment
 - SDDOT’s clear pattern of organizational excellence can be used to create performance measures and develop additional strategies aimed at increasing satisfaction in the areas identified for improvement.
 - Ensure all leadership are familiar with the results of the 2025 survey as they relate to the performance measures.

6.0 SUMMARY AND BENEFITS

Although the short-term benefits of customer surveys can be difficult to quantify, their long-term impact on an organization is significant. The 2025 Customer Satisfaction Assessment demonstrates that SDDOT’s continued efforts to gather customer feedback have positively influenced public perceptions of the Department. Overall satisfaction with interstates, divided highways, two-lane highways, and undivided highways remains exceptionally high, indicating that the Department’s priorities are well-aligned with customer needs.

By conducting surveys every few years, SDDOT provides its leadership and staff with objective, actionable feedback from residents and key customer groups. This regular input has fostered a customer-focused culture that strengthens the Department’s ability to meet public needs. While customer surveys should not be the sole tool for gathering feedback, they remain essential in balancing perspectives that might otherwise be dominated by special interest groups.

Despite strong performance, there is always room for improvement. To build on its success, SDDOT should act on the 2025 results and plan to conduct another survey by 2030 if resources allow. Repeating the assessment will help measure how effectively the Department addresses emerging issues from the residents’ perspective, evaluate its performance over time with internal and external stakeholders, and make necessary adjustments to stay ahead of the curve. This process not only demonstrates SDDOT’s commitment to transparency and customer satisfaction but also builds long-term public trust and loyalty.