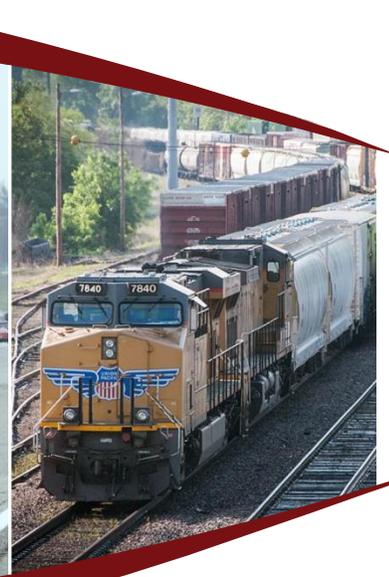




Commissioned by the Missouri Department of Transportation

A Report Card From Missourians



Final Report 2015

Prepared By:



HEARTLAND
MARKET RESEARCH LLC
Helping You Better
Understand Your StakeholdersSM

Report Number CMR 15-012

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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 <p>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. 3,527 completed responses were obtained between May 18, 2015 and June 22, 2015. 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 3,527 Missourians have a 95% level of confidence with a precision of +/- 1.65%.</p>			
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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 3,527 Missourians participated in the study.

GENERAL SATISFACTION FINDINGS

- **The majority of Missourians were satisfied with the job MoDOT is doing. Overall satisfaction was at 81%.**
- **While overall customer satisfaction rate remains high, it has declined slightly from the 2013 survey when it was 85%.**
- One in four Missourians were very satisfied with the job MoDOT is doing.
- Many measures of satisfaction with individual MoDOT services have stayed the same or dropped from 2013. Most satisfaction measures have dropped compared to the 2012 measures.
- Missourians continued to agree that MoDOT provides accurate (93%), timely (92%), and understandable (93%) information about projects in their areas, similar to the statistical results since 2009.
- 92% of Missourians agreed that MoDOT was the "primary transportation expert" similar to results since 2009.
- 85% of the residents indicated they trust MoDOT to keep its commitments to the public. While the decline from 2013 was within the statistical margin of error, this continued a five-year downward trend from 92% in 2010. The five-year drop was statistically significant.
- 70% of Missourians were satisfied with the job MoDOT has done keeping the surface of major highways in good condition. The dissatisfaction rate of 30% was the highest measured since it was 33% in 2009.
- Missourian satisfaction with MoDOT's efforts to maintain other state highways and bridges (both at 63%) was the lowest ever measured.
- 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 2013. 92% 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 \$25 per month in taxes and fees to fund Missouri state roads.**
- Out of those making an estimate, 43% of the respondent believed drivers spent less than \$25 per month, 31% selected the correct answer of \$25 per month, and 25% thought that Missouri drivers spent over \$25 per month in taxes and fees.
- **87% of residents were willing to pay more to adequately fund Missouri state roads.**
- For the first time since these studies have been conducted, a plurality of residents (24%) selected increasing fuel taxes 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 included adding tolls (23%), increasing the sales tax (17%), replacing the gas tax with a mileage tax (13%), and increasing car registration and license fees (11%). While *none of these* was not provided as an option, 12% of Missourians volunteered this option anyway. 12% percent was the lowest “none of these” response since 2009.
- In addition to the large increase in the percentage of respondents preferring an increase in fuel taxes (15% in 2013 to 24% in 2015), there was also a significant increase in the percentage of respondents favoring a mileage tax (9% to 13%). There was a decrease in the percentage of respondents preferring increases to sales taxes (22% in 2013 to 17% in 2015) or tolls (27% to 23%).

IMPORTANCE-SATISFACTION ANALYSIS FINDINGS

- The essential findings of the Importance-Satisfaction analysis were similar to those measured in 2013.
- In 2015 respondents indicated that MoDOT should continue to emphasize bright and easily understandable highway signs. According to the Importance-Satisfaction Matrix, Missourians are both very satisfied with these services and believe they are very important.
- In 2015, **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, but has declined 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 dropped from 2013.
- 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 2013 and public confidence that MoDOT will keep its commitments – now at 85%, the lowest score ever recorded on this measure – continued to trend downward.
- **Thus the two key findings** – 1) MoDOT’s declining, but high satisfaction rates, 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 well with insufficient resources.** This summary is supported by the declining satisfaction with transportation services and the changes in how people are willing to pay for additional funding. Taken together, these findings indicate that more people see a need for change and that Missourians have started to consider how to increase funding for transportation services.

METHODOLOGY

The survey was administered by a professional calling center to Missourians starting on May 18, 2015 and ending on June 22, 2015. The calling center randomly called a representative sample of people from every county considering age and gender. During this time, the calling center made 216,021 calls, spoke with 9,569 people, and completed 3,527 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	23	Adair	27	Cass	53	Boone	26
Atchison	24	Audrain	27	Clay	59	Callaway	26
Buchanan	24	Clark	47	Jackson	71	Camden	26
Caldwell	23	Knox	27	Johnson	58	Cole	26
Carroll	23	Lewis	27	Lafayette	51	Cooper	32
Chariton	33	Lincoln	27	Pettis	52	Crawford	26
Clinton	23	Macon	27	Platte	53	Dent	26
Daviess	23	Marion	27	Ray	51	Gasconade	52
DeKalb	23	Monroe	27	Saline	59	Howard	26
Gentry	32	Montgomery	27			Laclede	30
Grundy	23	Pike	27			Maries	27
Harrison	23	Ralls	27			Miller	26
Holt	32	Randolph	50			Moniteau	26
Linn	26	Schuyler	28			Morgan	26
Livingston	23	Scotland	27			Osage	26
Mercer	23	Shelby	27			Phelps	26
Nodaway	35	Warren	27			Pulaski	26
Putnam	23					Washington	26
Sullivan	23						
Worth	23						
Total	505	Total	503	Total	507	Total	505

St. Louis		Southwest		Southeast	
Franklin	99	Barry	22	Bollinger	20
Jefferson	100	Barton	22	Butler	20
Saint Charles	100	Bates	25	Cape Girardeau	29
Saint Louis	101	Benton	22	Carter	19
Saint Louis City	101	Cedar	22	Douglas	19
		Christian	22	Dunklin	19
		Dade	22	Howell	19
		Dallas	22	Iron	19
		Greene	32	Madison	19
		Henry	26	Mississippi	19
		Hickory	22	New Madrid	19
		Jasper	28	Oregon	19
		Lawrence	28	Ozark	19
		McDonald	22	Pemiscot	25
		Newton	22	Perry	24
		Polk	22	Reynolds	19
		Saint Clair	27	Ripley	19
		Stone	22	Saint Francois	19
		Taney	28	Sainte Genevieve	24
		Vernon	22	Scott	20
		Webster	22	Shannon	19
				Stoddard	19
				Texas	19
				Wayne	19
				Wright	19
Total	501	Total	502	Total	504

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 3,527 Missourians have a 95% level of confidence with a precision of +/- 1.65%.**

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. 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 similar to the previous (2013) satisfaction study. At MoDOT's request, a few well-researched topics were replaced with questions aimed at gathering citizen input on newer issues of concern. When feasible, the wording of the questions was kept the same as previous years to facilitate comparisons across surveys.