

A Report Card from Missourians



FINAL REPORT 2019



Prepared By:

REPORT NUMBER CMR-20-001

**HEARTLAND
MARKET RESEARCH LLC**

*Helping You Better Understand
Your StakeholdersSM*

Commissioned by the Missouri Department of Transportation



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Final Report

Project Number: TR201522

Report Number: CMR-20-001

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Prepared for the
Missouri Department of Transportation

September 30, 2019

By

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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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1. Report No. CMR 20-001		2. Government Accession No.		3. Recipient's Catalog No.	
4. Title and Subtitle A Report Card from Missourians - 2019				5. Report Date September 30, 2019 Published: January 2020	
				6. Performing Organization Code MoDOT	
7. Author(s) Lance Gentry, Ph.D. https://orcid.org/0000-0003-4115-2046				8. Performing Organization Report No. CMR 20-001	
9. Performing Organization Name and Address Heartland Market Research LLC 1405 Hawkins Meadow Drive Fenton, MO 63026 www.HeartlandMarketResearch.com				10. Work Unit No.	
				11. Contract or Grant No. MoDOT project # TR201522	
12. Sponsoring Agency Name and Address Missouri Department of Transportation (SPR) Transportation Planning Division P.O. Box 270 Jefferson City, MO 65102				13. Type of Report and Period Covered Final Report (June 2019-July 2019)	
				14. Sponsoring Agency Code MoDOT	
15. Supplementary Notes Conducted in cooperation with the U.S. Department of Transportation, Federal Highway Administration. MoDOT research reports are available in the Innovation Library at https://www.modot.org/research-publications .					
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. 3,508 completed responses were obtained between June 10, 2019 and July 31, 2019. 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 3,508 Missourians have a 95% level of confidence with a precision of +/- 1.65%.					
17. Key Words Customer survey, customer satisfaction, partners, construction projects, transportation solutions, communication preferences			18. Distribution Statement No restrictions. This document is available through the National Technical Information Service, Springfield, VA 22161.		
19. Security Classif. (of this report) Unclassified.		20. Security Classif. (of this page) Unclassified.		21. No. of Pages 123	22. Price

Form DOT F 1700.7 (8-72)

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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 3,508 Missourians participated in the study.

GENERAL SATISFACTION FINDINGS

- **The majority of Missourians were satisfied with the job MoDOT is doing. Overall satisfaction was at 77%.**
- 20% of Missourians were very satisfied with the job MoDOT is doing.
- **While still high, the overall customer satisfaction rate has dropped significantly from the last survey.**
- **Most measures of satisfaction with individual MoDOT services have decreased from 2017.**
- Missourians continued to agree that MoDOT provides accurate (92%), timely (92%), and understandable (90%) information about projects in their areas, similar to the statistical results since 2009.
- 91% of Missourians agreed that MoDOT was the "primary transportation expert" similar to results since 2009.
- 82% of the residents indicated they trust MoDOT to keep its commitments to the public compared to 87% in 2017. In 2019, 32% of the population strongly agreed with this measure, down from 41% in 2017.
- 65% of Missourians were satisfied with the job MoDOT has done keeping the surface of major highways in good condition, compared to 75% in 2017.
- Missourian satisfaction with MoDOT's efforts to maintain other state highways (60%) was also lower than two years ago when it was measured at 67%.
- 63% of Missourians were satisfied with the job MoDOT has done keeping bridges in good condition, compared to 67% in 2017.
- Most (81%) residents agreed that MoDOT did a good job of minimizing travel delays caused by construction and maintenance on highways, down from 86% in

2017. 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 \$30 per month in taxes and fees to fund Missouri state roads.
- Out of those making an estimate, 34% of the respondent believed drivers spent less than \$30 per month, 35% selected the correct answer of \$30 per month, and 32% 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.** Almost half (47%) of all respondents estimated this cost at under \$50 per month. 77% of the respondents thought the cost was \$100 or less per month. In 2019, the actual average cost per driver was about \$196 per month.
- **For the third study in a row, a plurality of residents selected increasing fuel taxes as their preferred option for increasing revenues to adequately fund Missouri state highways and roads.** 29% of respondents thought this was the most acceptable method, similar to findings from 2017. Other listed options included adding tolls (17%, down significantly from 2017), increasing the sales tax (15%), replacing the gas tax with a mileage tax (15%), and increasing car registration and license fees (11%). While *none of these* was not provided as an option, 14% of Missourians volunteered this option anyway.

IMPORTANCE-SATISFACTION ANALYSIS FINDINGS

- The essential findings of the Importance-Satisfaction analysis were similar to those measured in 2017 other than a dip in respondent satisfaction for virtually all of the services MoDOT provides.
- In 2019 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 continue to believe they are very important. These findings were similar to those found in 2015 and 2017.

- In 2019, **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 the surface of *major* highways in good condition.
 2. Keeping bridges in good condition.
 3. Keeping the surface of *other* highways in good condition.

CONCLUSIONS

- While overall scores were quite positive, **there was a downward trend in satisfaction measures 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 – decreased for most measures from 2017.
- A regression analysis was conducted on the survey data. Given reasonable causal assumptions,¹ **the drop in Missourian satisfaction with MoDOT is primarily due to decreased trust that MoDOT will keep its public commitments and decreased satisfaction with highway conditions.**

¹ Statistics can indicate correlations, not causality. For this research, it was assumed that overall satisfaction with MoDOT was the result of the other items measured in this research. Given this assumption, 45% of the variance in respondents' overall satisfaction with MoDOT can be predicted by measuring their trust that MoDOT will keep its commitments to the public (30%), their satisfaction with MoDOT's efforts to keep the surface of highways in good condition (11% for other state highways, 3% for major state highways), and their satisfaction with MoDOT's efforts to mow and trim trees, grass, and weeds along highways. The other twenty measures combined further explain another 1% of the variance in the overall satisfaction measure. 54% of the variance is due to individual reasons or other reasons that were not captured by this research.



METHODOLOGY

The survey was administered by a professional calling center to Missourians starting on June 10, 2019 and ending on July 31, 2019. The calling center randomly called a representative sample of people from every county considering age and gender. During this time, the calling center made 210,968 calls, spoke with 15,617 people, and completed 3,508 phone interviews. The average respondent took 14.2 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	24	Adair	28	Cass	67	Boone	26
Atchison	29	Audrain	28	Clay	51	Callaway	26
Buchanan	23	Clark	27	Jackson	52	Camden	33
Caldwell	25	Knox	27	Johnson	56	Cole	27
Carroll	27	Lewis	33	Lafayette	56	Cooper	26
Chariton	23	Lincoln	27	Pettis	55	Crawford	26
Clinton	24	Macon	30	Platte	52	Dent	33
Daviess	29	Marion	33	Ray	58	Gasconade	26
DeKalb	25	Monroe	28	Saline	53	Howard	26
Gentry	23	Montgomery	33			Laclede	26
Grundy	25	Pike	33			Maries	27
Harrison	23	Ralls	27			Miller	26
Holt	23	Randolph	29			Moniteau	33
Linn	31	Schuyler	28			Morgan	27
Livingston	23	Scotland	29			Osage	26
Mercer	24	Shelby	28			Phelps	33
Nodaway	27	Warren	34			Pulaski	26
Putnam	23					Washington	27
Sullivan	27						
Worth	23						
Total	501	Total	502	Total	500	Total	500



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St. Louis		Southwest		Southeast	
Franklin	100	Barry	23	Bollinger	19
Jefferson	101	Barton	24	Butler	19
Saint Charles	100	Bates	23	Cape Girardeau	20
Saint Louis	101	Benton	23	Carter	19
Saint Louis City	100	Cedar	29	Douglas	21
		Christian	22	Dunklin	19
		Dade	28	Howell	19
		Dallas	22	Iron	22
		Greene	22	Madison	21
		Henry	22	Mississippi	19
		Hickory	23	New Madrid	20
		Jasper	22	Oregon	20
		Lawrence	22	Ozark	19
		McDonald	29	Pemiscot	20
		Newton	28	Perry	19
		Polk	23	Reynolds	21
		Saint Clair	22	Ripley	22
		Stone	23	Saint Francois	19
		Taney	28	Sainte Genevieve	19
		Vernon	22	Scott	19
		Webster	22	Shannon	19
				Stoddard	19
				Texas	22
				Wayne	22
				Wright	23
Total	502	Total	502	Total	501



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 3,508 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. 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 (2017) statewide satisfaction study. At MoDOT's request, a few changes were made to the survey. Some redundant wording was eliminated from Question 4. Two options about travel by air (l) and Amtrak (m) were eliminated from Questions 6 and 7. The available options for Questions 9 and 11 were adjusted to be more current. The wording of the other questions was kept the same as previous years to facilitate comparisons across surveys.