

*Omnibus 2013*Public Opinion Survey

MnDOT's Customer Relations Office

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Administered by:

The Improve Group and Dieringer Research Group

We all have a stake in $A \oplus B$

















Table of Contents

Section	Page
Executive summary	i
Methodology	3
Construction disruption and acceptability	5
Trust and Confidence	7
Trust and Confidence: Roads and Bridges	24
Maintenance and Operations	31
Communications and 511mn.org	46
Transit, Bike and Pedestrian, Speed limit law	60
Zipper Merge	78
Transportation funding	83
Implications and strategies	92
Appendices (A. Methodology and B. Questionnaire)	



















A note on methodology Omnibus went multi-modal in 2013

- Previous years: All land-line phone sample
- Samples drawn and results weighted (age and income) to reflect Minnesota's 2010 Census demographics

MODE	#	%		
Land-line	460	41%	700	62%
Cell	240	22%	700	02/0
Web	427	38%		
TOTAL	1,127	100%		

REGION	#	%
Metro	632	56%
Greater Minnesota	495	44%
TOTAL	1,127	100%

Complete methodology described in Appendix A





















Why? And so what?

- Better capture and reflect Minnesota's population
 demographics, communication preferences,
 unknowns in 2013 and forward
- Telephone Acquiescence/positive bias
 Internet Possible negative bias
- ⇒Results for some of the attitudinal indicators dropped. Experiential indicators were more constant
- ⇒Survey-mode specific differences were not substantial enough to correct for; no practical or actionable significance

Omnibus Survey 2013 4















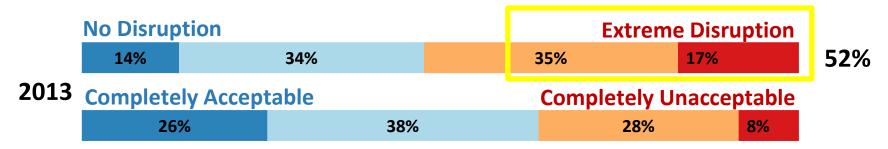


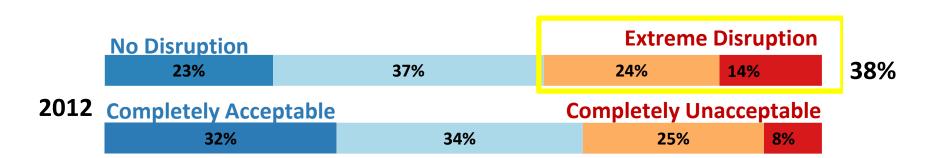


2013 construction more disruptive

Up from 38% in 2012 to just over half in 2013

Statewide Level and Acceptability of Traffic Disruption from Construction Projects, 2012 and 2013





Q: How much traffic disruption did construction projects cause for you in 2013? N=1,111





















Experience significantly more negative in the Metro area

2013 Level and Acceptability of Traffic Disruption from Construction Projects

Metro Counties

No Disruption

Street Disruption

37%

Completely Acceptable

Completely Acceptable

33%

Completely Acceptable

33%

33%

33%

33%

33%

	No Disruption		No Disruption		Ex	treme Disru	ption
Greater	20%	37%		339	%	10%	
MN			Complet	Completely Unaccepta			
IVIIN	31%		44%		22%	4%	

	(Combined) Disruption	(Combined) Unacceptability
Metro	59%	45%
Greater Minnesota	43%	25%

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Trust and Confidence in MnDOT













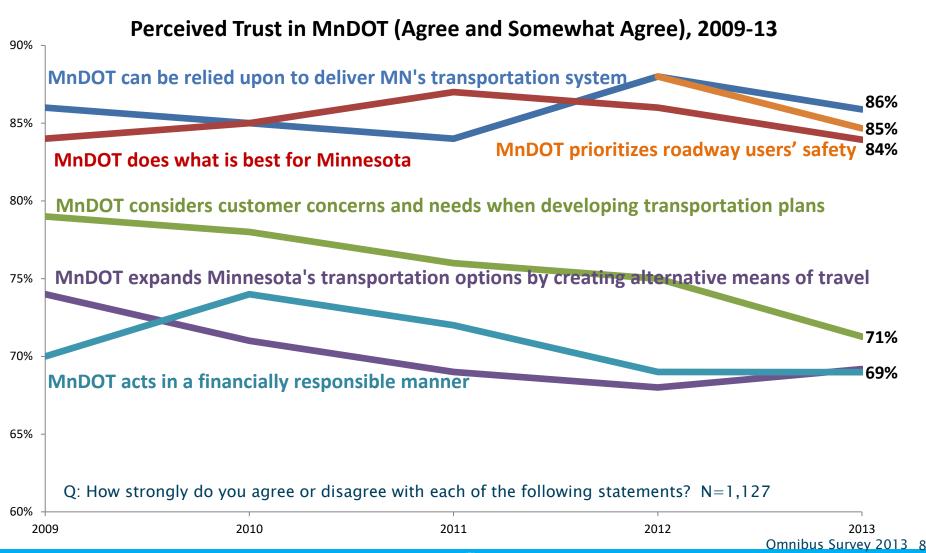








Slight decreases; still, high trust levels















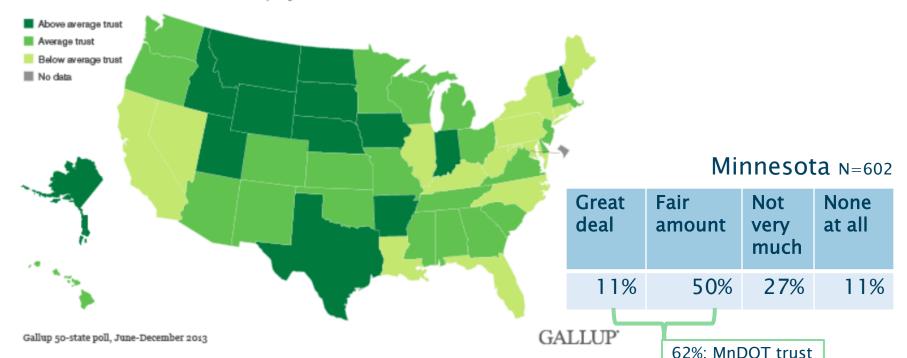






In perspective: Trust in Government

Trust in State Government, by State



In general, trust is lower in more populous states than in less populous states. The 10 most populous states and 10 least populous states differ by 11 percentage points in state government trust, with the middle population states in between. Larger states have larger economies and more citizens needing services, and often more diverse populations, so they may be more challenging to govern than smaller states.

http://www.gallup.com/poll/168251/illinois-residents-least-trusting-state-government.aspx?#2

















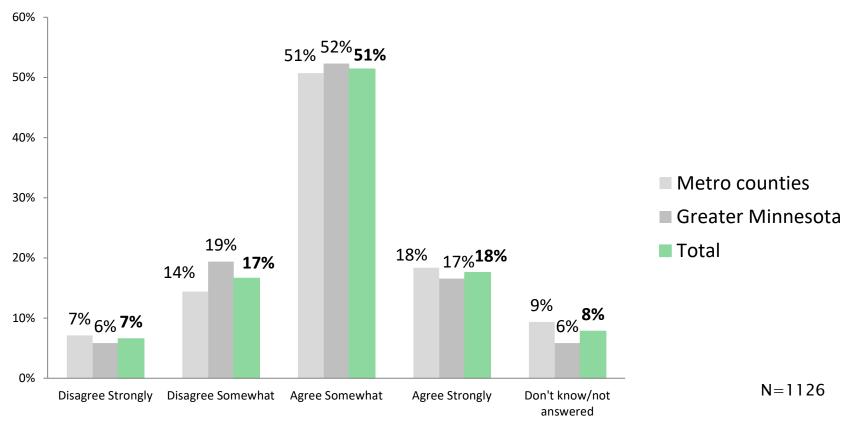


indicators higher



Financially responsible: 69%

- Large portion of 69% agreement is "Somewhat"
- "Don't know" down to 8%, from 12% in 2012
- No significant difference by location



Omnibus Survey 2013 10











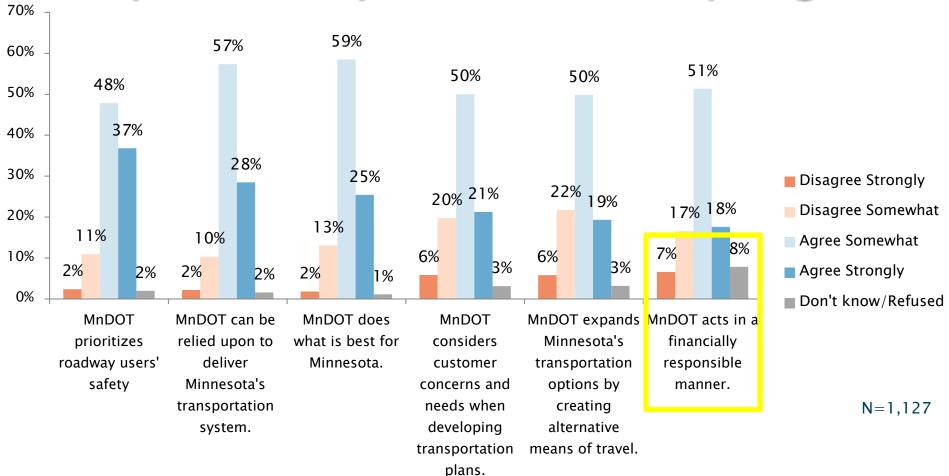








"Don't knows" for "financial responsibility" still *relatively* high























Summary of "Disagreed" follow-up, regarding "financial responsibility"

- "Not fixing it right the first time"
- Construction planning/closures/detours
- Communication regarding construction
- Specific projects wanted (or not wanted)
- Disagreement with projects
 - * Roundabouts
 - * Light rail and "trains"
 - * St. Croix Crossing
- Greater Minnesota vs. Metro
- Concern about contracts
- "Government is wasteful"



















~25% Disagreed - Why?

"Not fixing it right the first time"

- They could get stuff done better if they would not take the cheapest plan and then redo it a year or two down the road. An example would be 394 to Plymouth
- They spend X amount to upgrade a road; and a few years later, it's already outdated
- I see a lot of roads being 'patched' year after year and not getting to the base problem of needing to be totally taken out and start with a new base.
- I see money being spent on things such as a mill and fill as a very expensive patch. Money should be spent to fix roads for a more lasting fix.
- You're going to redo those exits which is not financially responsible to have to go back and redo an existing project.
 That is being fiscally irresponsible.
 N=270 Combined "Disagreed" Omnibus Survey 2013 13



















Construction planning/closures/detours

- I don't think we are choosing to do things to make roadways last a long time; so we will have to work on them more often. They don't factor in the cost of disruption.
- By closing four ways to get out the Twin Cities, horrible going to northern Minnesota, not fiscally appropriate.
- Projects are too many at one time; slows the work down.

Specific projects wanted (or not wanted)

- They just put a culvert in the back of my place, and it's too big for the spot
- If you're in Belle Plaine at 169 and 3, there is no overpass or frontage road; and it is too difficult to get into town, and they haven't listened to the town at all.

Omnibus Survey 2013 14



















Disagreement with projects

Roundabouts

- Roundabouts are confusing and not fiscally sound.
- Perfectly good intersection taken out and dangerous roundabout [placed].

Light rail and "trains"

- Think it has to do with the light rails serve too few people.
- They spend money on stuff we don't need light rail, green buses. More concerned about bikes and bike paths than people who have to go to work.
- Feel that money earmarked for roads and bridges was spent on light rail.

St. Croix Crossing

...sprawl-inducing bridges for Wisconsin



















Greater Minnesota vs. Metro

- They focus more on the metropolitan area than outlying counties.
- The greater Twin Cities receives more benefits than outstate. Counties are left on their own to fund and repair.

Concern about contracts

- They award to the same firm that had failure in the past.
- Gives contracts to out-of-state companies.
- Make the contractors responsible for the quality of their work so it lasts and does not start to deteriorate after a couple of years after the work is done.
- It seems like MnDOT always overruns their budgets.





















Communication around construction

- Sometimes plans are told to us at the last minute, and the plans don't always make sense.
- I don't see a lot of logic in their selection of projects

"Government is wasteful"

- Any state or government department no matter where in the United States is never financially responsible in my opinion.
- I do not believe anyone at the government level ever worries about making any kind of cost/benefit analysis of certain 'projects' or 'ideas' that the public is asked to fund. On day-to-day operations, I believe that MnDOT is quite responsible and is one of the better governmental agencies in Minnesota.





















Perception of customer focus has declined since 2009

	2009	2010	2011	2012	2013
MnDOT considers customer concerns and needs when developing transportation plans.	79%	78%	76%	75%	71%

"Strongly agree" and "Somewhat agree," combined

Why?



- Frustration with construction congestion and delays
- Transit/"transportation options," particularly in Greater Minnesota
- Specific improvements that are not happening at all or to the extent that respondents would like











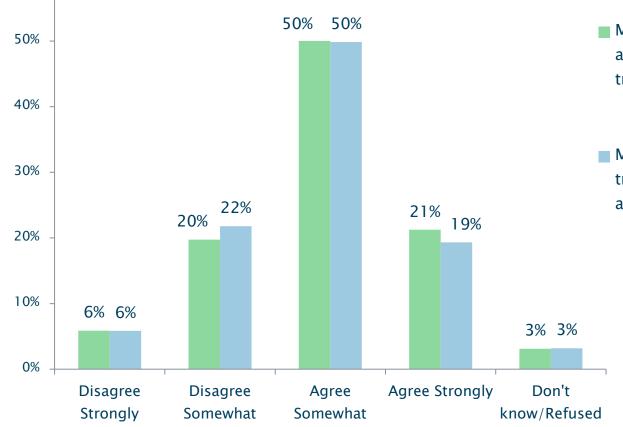








"Customer needs" + "Expands transportation options" are strongly correlated in 2013



MnDOT considers customer concerns and needs when developing transportation plans.

MnDOT expands Minnesota's transportation options by creating alternative means of travel.





Omnibus Survey 2013 19









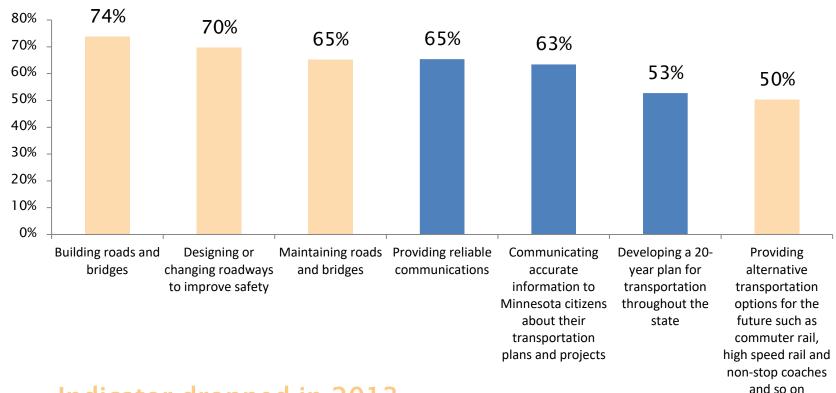








"Confidence in MnDOT" summary 2013



Indicator dropped in 2013
Indicator stayed approx. the same or increased in 2013









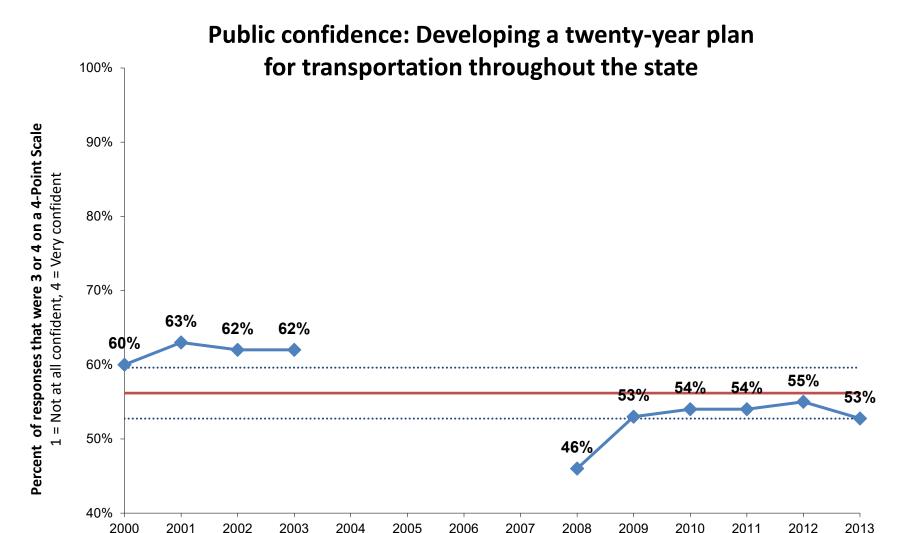












Year question was asked

Number of Respondents: 2000-2012 = 800; 2013 = 1127 **Method:** 2000-2012 results were collected via landlines, while 2013 included landlines, cell phones, and internet surveys.











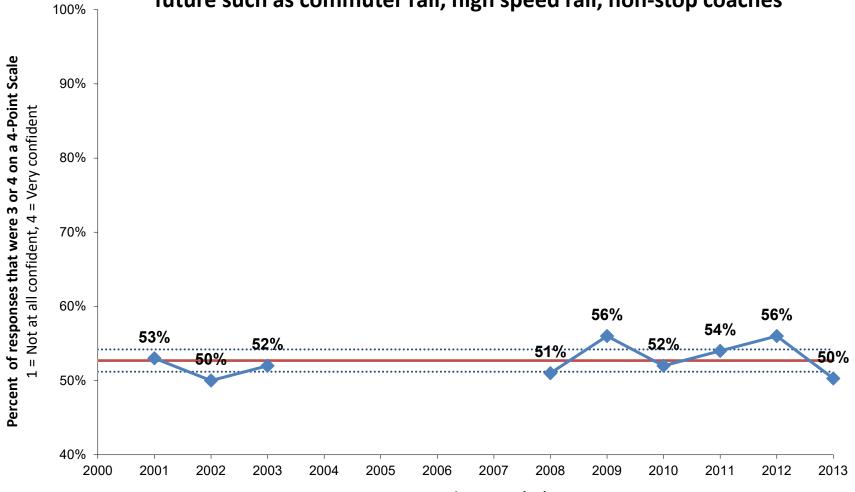








Public confidence: Providing alternative transportation options for the future such as commuter rail, high speed rail, non-stop coaches



Year question was asked

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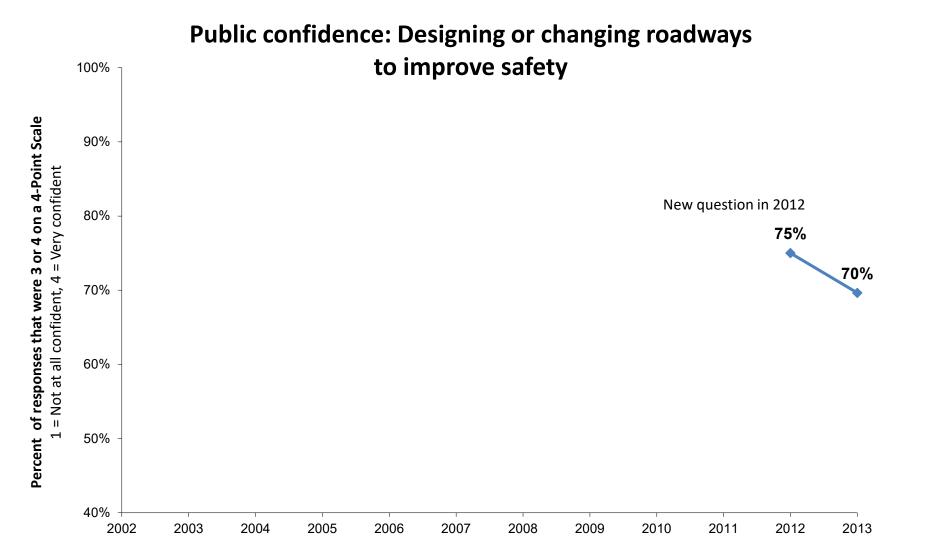












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Trust and Confidence in MnDOT: Roads and Bridges













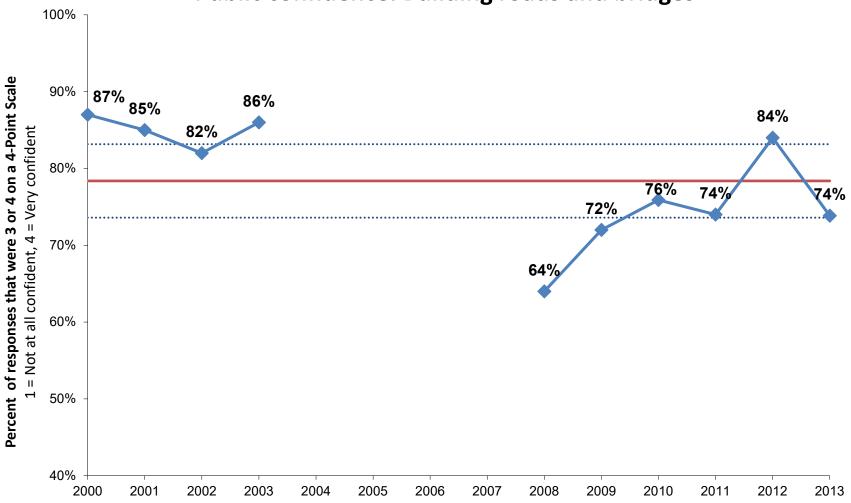








Public confidence: Building roads and bridges



Number of Respondents: 2000-2012 = 800; 2013 = 1127 Method: 2000-2012 results were collected via landlines, while 2013 included landlines, cell phones, and internet surveys.











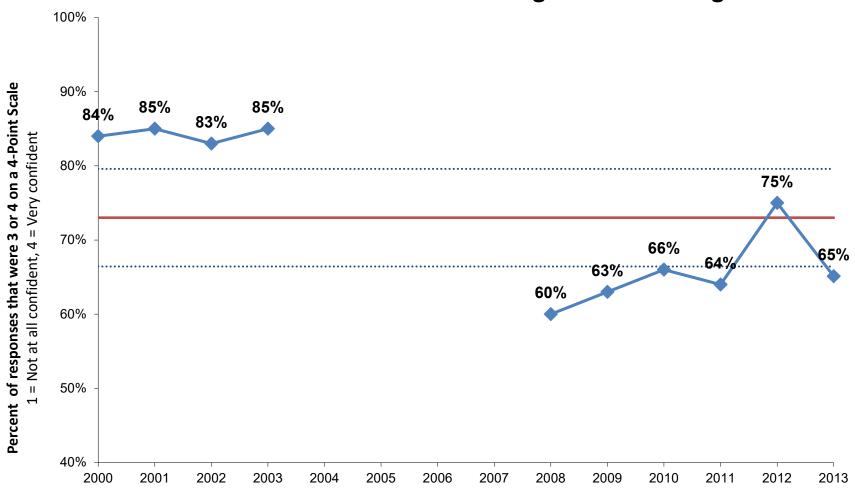








Public confidence: Maintaining roads and bridges



Number of Respondents: 2000-2012 = 800; 2013 = 1127 **Method:** 2000-2012 results were collected via landlines, while 2013 included landlines, cell phones, and internet surveys.



















Why the drop in confidence regarding ROADS and BRIDGES?

Our messages are getting through:

- Age of the system
- Not enough funding

I hear all the time about the lack of funds to maintain the bridges across the state, and it is a deep concern for me ever since the 35W collapse.

Our infrastructure is decaying and not enough money is allocated for its upkeep.

The bridges need work, faster than it is happening.

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References to the ASCE 2013 Report Card

A huge number of bridges in our city are rated as being functionally obsolete. How can MnDOT let that happen?

News of substandard bridges throughout the state.

People are downgrading the Minnesota bridges; half are rated as unsafe

I don't think any bridges are safe if they are old.



1,190 of the 13,121 bridges in Minnesota (9.1%) are considered structurally deficient.

423 of the 13,121 bridges in Minnesota (3.2%) are considered functionally obsolete.

Omnibus Survey 2013



















Experience and greater awareness

→ More references to 35W this year than in 2012

I see rusted, crumbling concrete under bridges and overpasses.

Because of what happened with the 35W bridge and seeing deteriorating bridges.

I see bridges all over the state that are in various states of disrepair.

Bridges have fallen down. Driving under bridges and looking up at their condition is frightening. Bridges being built (494 over Mississippi) are failing before they're even put into service.



















Concern about roads is more about effectiveness, less about safety

I am sure that it has to do with funding, but many of the roads that I use daily, CR 81 and Hwy 169, are patched yearly and not in good condition at all. I have noticed that on so very many roads across the state.

They are ripping off and laying down the roads on I-35 over and over again.

They use materials that don't last; have to continue to refill.

The potholes everywhere and not fixing the problem. Just putting a band-aid on it.

If doing it, do it right the first time.



















Maintenance & Operations Indicators











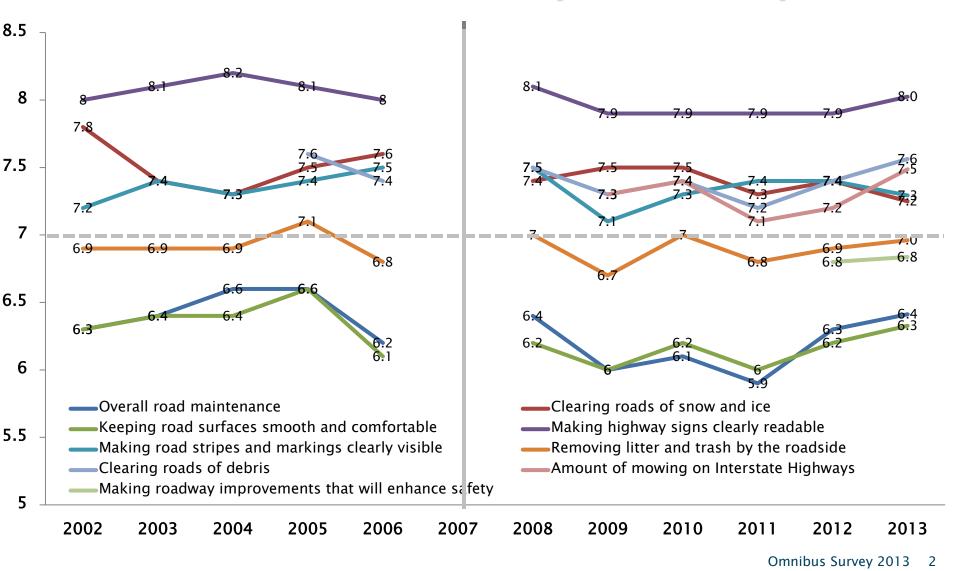








2013 consistent with previous years





















Maintenance Indicator summary 2013

All maintenance indicators are within expected limits, or slightly higher, relative to previous years' ratings

For each of the following, please tell us how WELL you think MnDOT is doing in that area:	
Making highway signs clearly readable	8.0
Clearing roads of debris	7.6
The amount of mowing done on interstate freeways, which include: Interstates 35 (35E and 35W), 90, 94, 394, 494 and 694	7.5
Clearing roads of snow and ice	7.3
Making road stripes and markings clearly visible	7.3
Removing litter and trash by the roadside	7.0
Making roadway improvements that will enhance safety	6.8
Road maintenance	6.4
Keeping road surfaces smooth and comfortable	6.3



N = 1,127











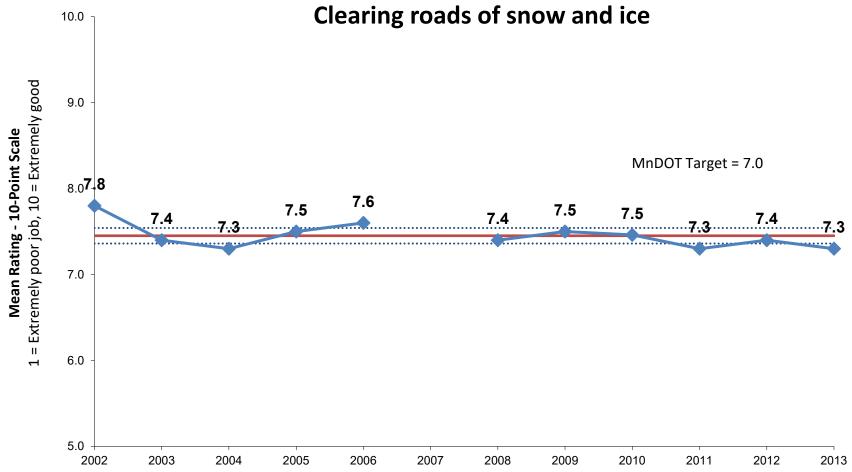




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Maintenance performance:



Number of Respondents: 2002-2012 = 800; 2013 = 1127 Method: 2002-2012 results were collected via landlines, while 2013 included landlines, cell phones, and internet surveys.











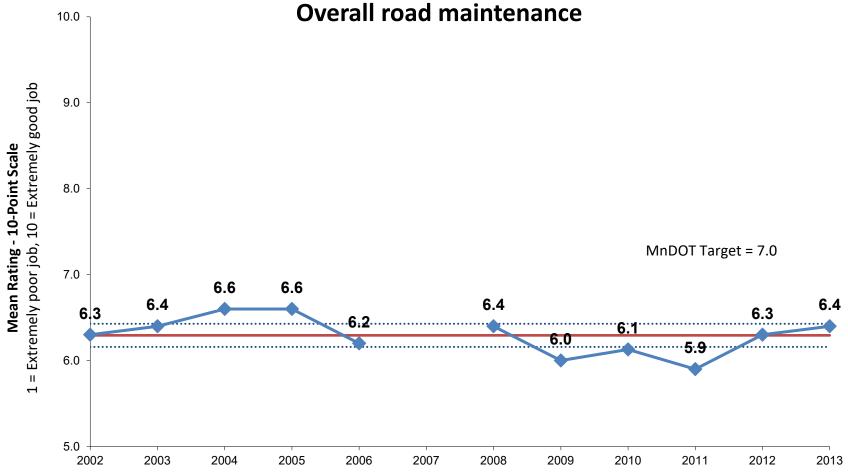








Maintenance performance: Overall road maintenance



Number of Respondents: 2002-2012 = 800; 2013 = 1127 Method: 2002-2012 results were collected via landlines, while 2013 included landlines, cell phones, and internet surveys.











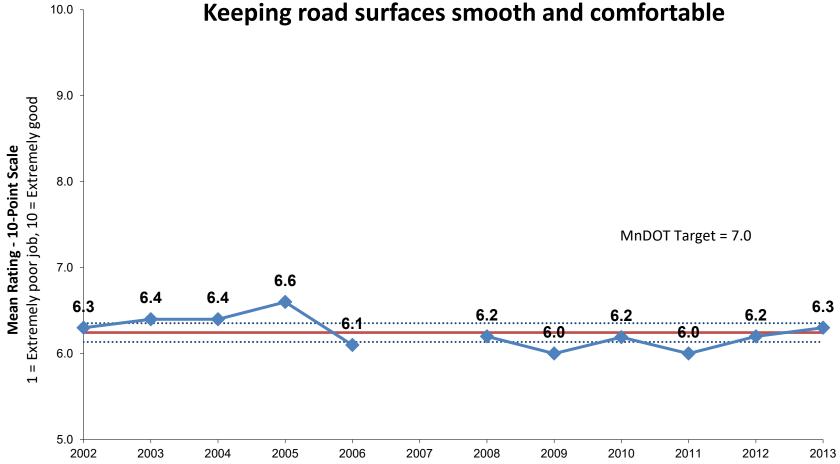








Maintenance performance: Keeping road surfaces smooth and comfortable



Number of Respondents: 2002-2012 = 800; 2013 = 1127 Method: 2002-2012 results were collected via landlines, while 2013 included landlines, cell phones, and internet surveys.



















"Keeping road surfaces smooth and comfortable" follow-up

Respondents who rated this as <7

The general or 'overall' condition of the highway pavement	259	52%
Potholes	99	20%
Both	144	29%
TOTAL	502	100%
Don't know	9	











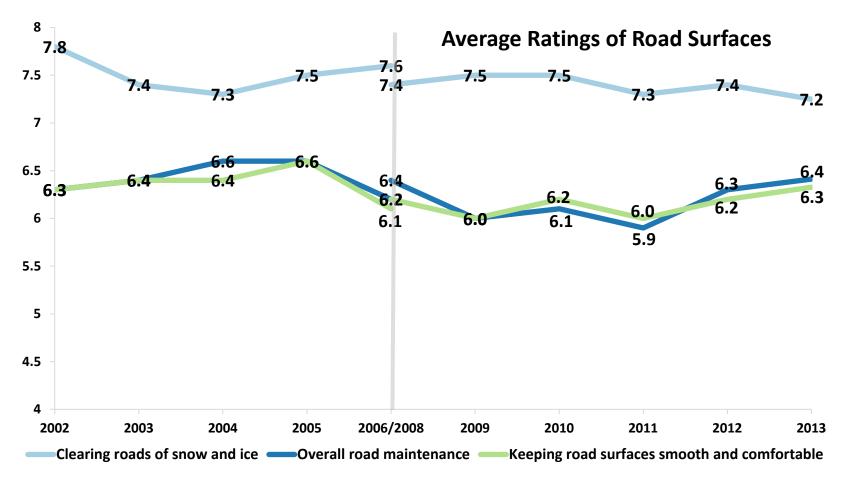








"Overall" continues to track "smooth and comfortable"











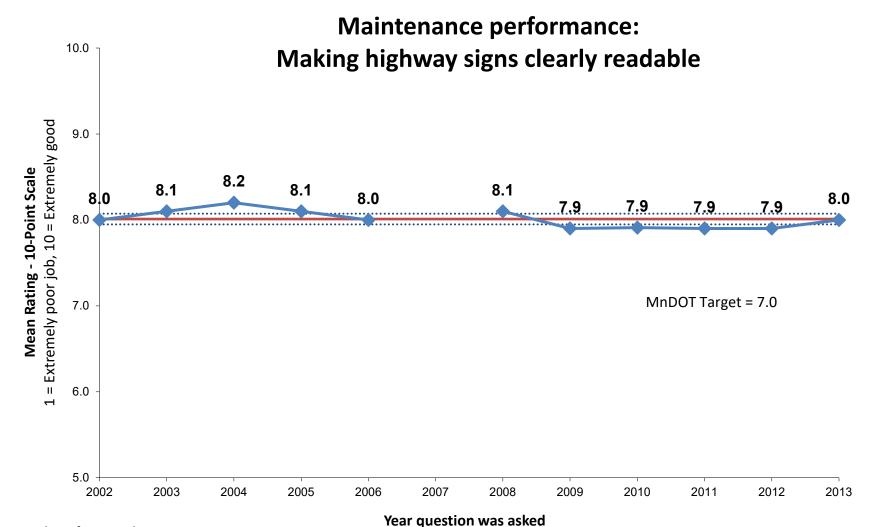












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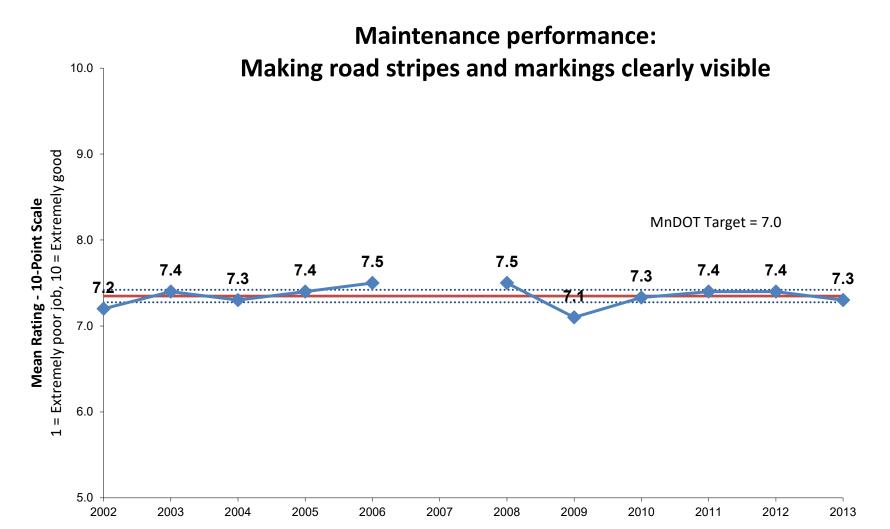












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Year question was asked









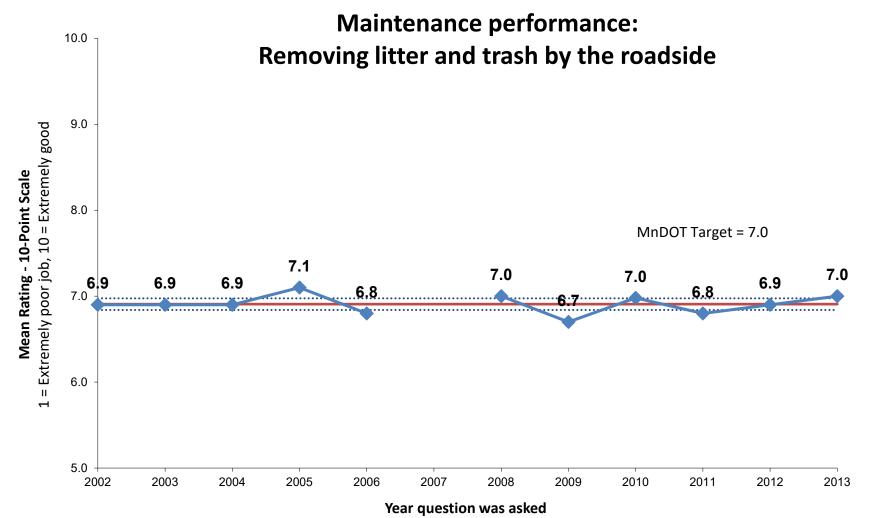












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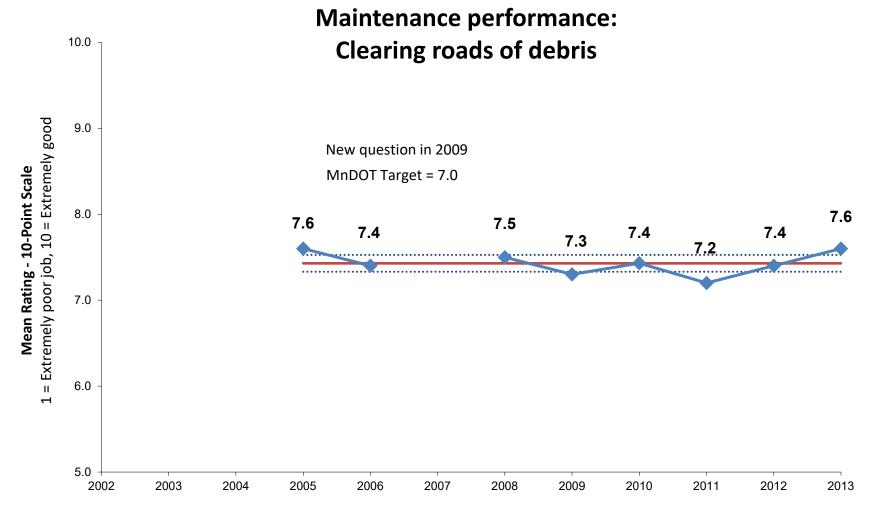












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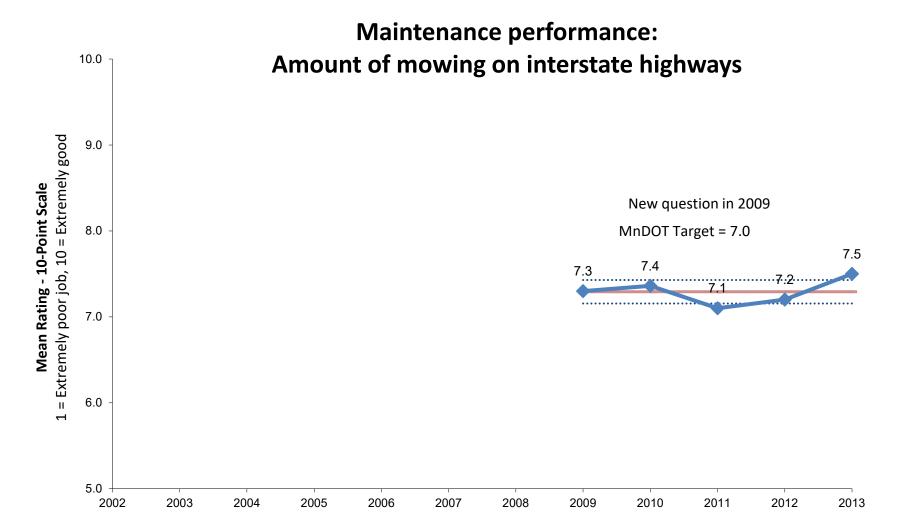












Year question was asked

Number of Respondents: 2009-2012 = 800; 2013 = 1127 **Method:** 2009-2012 results were collected via landlines, while 2013 included landlines, cell phones, and internet surveys.



















"Mowing the interstate freeways" follow-up

LESS often than they should	83	44%
MORE often than they should, or	24	13%
The right amount	80	43%
Total	187	100%
Don't know	48	

Respondents who rated mowing as <7











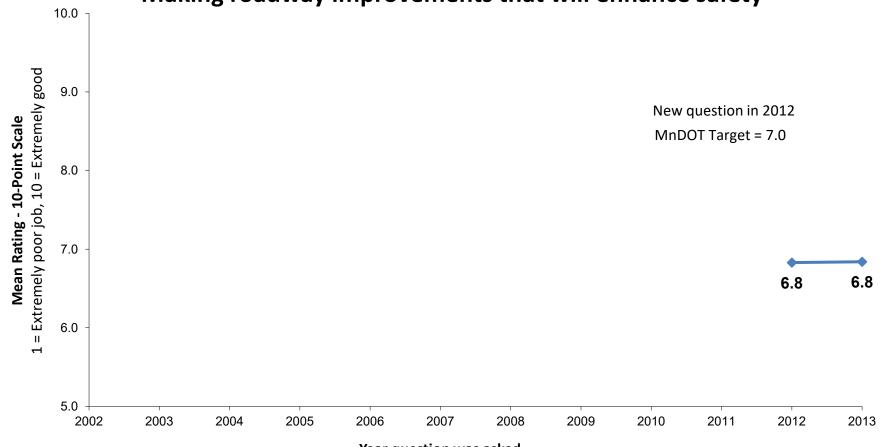








Maintenance performance: Making roadway improvements that will enhance safety



Year question was asked

Number of Respondents: 2005-2012 = 800; 2013 = 1127 **Method:** 2005-2012 results were collected via landlines, while 2013 included landlines, cell phones, and internet surveys.



















Communications



















About 2/3 of Minnesotans are relatively satisfied with our communications

Confidence in MnDOT's ability to provide:

- Accurate info about plans and projects 63%
- Reliable communications 65% (3-4 / 4-pt. scale)

How reliable *are* our communications 64% (7–10 / 10–pt. scale)









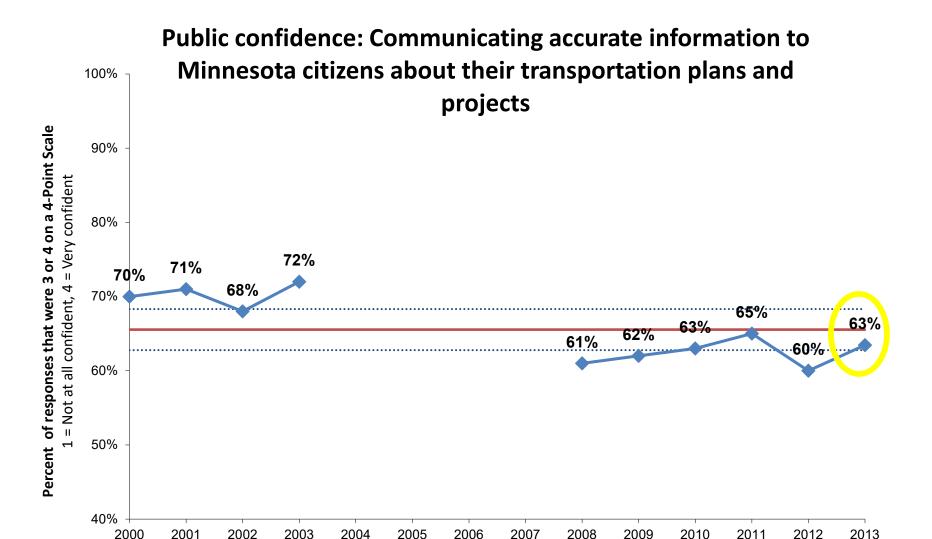












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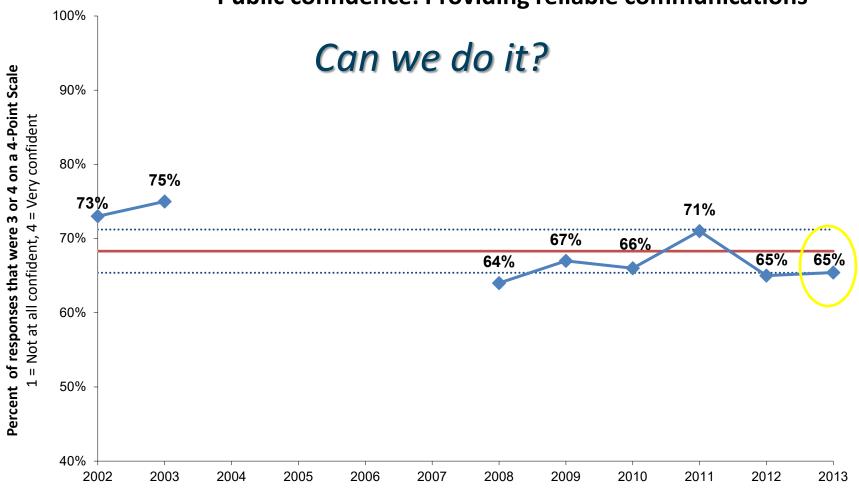








Public confidence: Providing reliable communications



Year question was asked

Number of Respondents: 2000-2012 = 800; 2013 = 1127 Method: 2000-2012 results were collected via landlines, while 2013 included landlines, cell phones, and internet surveys.



















How have we done?

We will now focus on MnDOT's communications efforts. Thinking about ALL of the different communications provided by the Minnesota Department of Transportation, how reliable are these communications, in your opinion? Not at All Reliable – 1 6 1% 13 1% 22 2% 4% 46 156 15% 6 13% 132 233 22% 8 250 24% 64% 9 102 10% Extremely Reliable - 10 82 8% 100% **Total** 1041 Don't know/Refused 86



















High bar; and one bad experience shapes their opinion

Absence of communication; they don't hear from us or know how to find information

Construction: Project websites, 511, signage

- Information about construction projects not detailed enough or inaccurate
- Not updated frequently enough (construction and road conditions)
- Interface "technological dinosaur"

Less mentioned: How MnDOT makes and communicates about decisions, plans

N=180, respondents who rated communication 1-4 (1-6 web) on a 10-pt. scale Omnibus Survey 2013 21



















More opportunities for outreach: e.g., Constant Contacts

- I don't see much other than signs on local roads giving very bare-bones information.
- For any project other than very large projects, communication is very limited and not timely.
- Policy updates need to get to a broader range of non-public, commercial-free, Christian radio, as well as major ones.
- I appreciate the updates in the paper, but they don't always make sense to me when I read them.
- Most of the communication is based on Twin Cities and not Greater Minnesota.
- No one tells you anything, and the only thing I know I read in the paper (Hwy 53).
- There's not much news except that you need more money. How are you spending the money you have?



















Construction info: Increase Specificity, Accuracy, Usability

Project websites

- When I go on to the MnDOT website and to try to read the schematics of the plans, they are very hard to understand. My Wednesday morning breakfast group has actually commented on this.
- Most of the construction projects did not have clearly defined dates of construction and [it was] generally very difficult to even find information on the websites for MnDOT and the City of Minneapolis. They were also very unclear on what specific areas were affected so that we could plan detours accordingly.
- Update outstate roads more often.. Update more on the weekends
- There were some estimated dates of finishing projects that did not happen but were not updated on the website.

Omnibus Survey 2013



















511

- I did not see anything on the 511 website about night work that made getting out of Minneapolis on I-94 a four-hourlong journey from Maple Grove to St. Cloud. We would have taken an alternative route.
- MnDOT interactive website is useful but a technological dinosaur. Slow, sluggish, outdated.
- Road condition updates are not kept updated
- Road conditions listed on 511 not updated in a timely manner in rural areas
- The winter road conditions page is usually 3–5 or more hours behind the current time. More reliable info would be nice, especially since I take Hwy 10 to St. Cloud every day.
- Recently, the 511mn website did not have up-to-date road condition information that caused people to take trips they probably shouldn't have





















On roadways, in construction work zones

- The inconsistent messages on the roadways.
- Construction lane closure signs not removed in a timely manner
- Accuracy of detour information
- Sometimes when a sign says the road or lane ahead is closed, it's not
- The alternative route designation is often confusing or signs not strategically placed. If following a semi, you often do not see the signs until you have passed them.

Construction in general

- When there are construction projects going on, it would be nice to see on a daily basis what lane changes are made, what portions are closed, when it is obstructed during rush hour..., when they are going to be using four-way stoplights during rush hour.
- Closures are not always clearly communicated ahead of time with regard to extent, duration, and alternatives.
 Omnibus Survey 2013 25



















What's in the news?

- Light rail
- Construction projects, closures
- Stories about upcoming construction
- Bridge construction (SCC, Hastings, Lafayette)

In the wintertime, information about weather and roads.











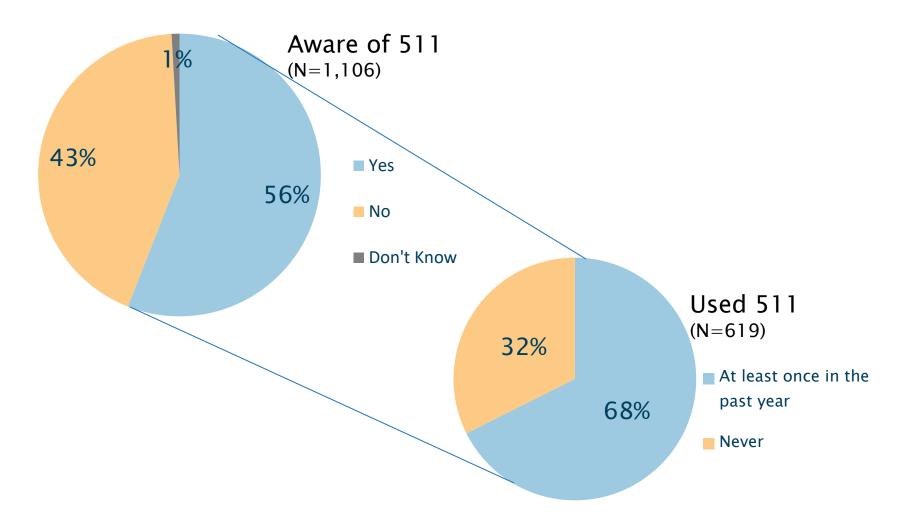








511: Room to Grow





















Majorities of users found 511 useful and accurate; opportunity to move the "Sometimes" users

Useful (N=415) **Accurate** (N=409) Never 2% 3% Rarely 5% 3% Sometimes 27% 18% Frequently 34% 43% **Always** 31% 33%

Strong majorities are satisfied



















What was "inaccurate?"

Q. How often did you get accurate info from 511?A quarter of users said "sometimes," "rarely," or "never."

Q. Did you receive inaccurate information about:

Construction information	58%	55	
Bad weather road conditions	40%	38	_95 responden
None of the above	14%	14	



















Transit, Bike and Pedestrian













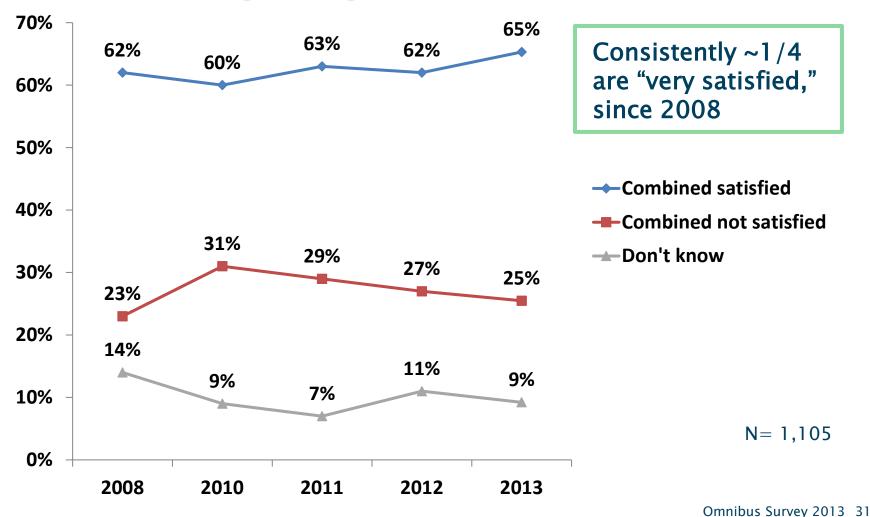








Two-thirds satisfied with availability of public transit





















Metro significantly more satisfied with transit availability

	Metro	Greater Minnesota
Very Satisfied	26%	19%
Somewhat Satisfied	45%	39%
Not Very Satisfied	13%	15%
Not At All Satisfied	9%	15%
Don't Know	7%	12%

	Metro	GM
Combined Satisfied	71%	58%
Combined Not Satisfied	22%	30%
Don't Know	7%	12%

N=1,104



















Lack of any transit biggest problem

More locations and direct routes also needed

Not available at all in my community	124	44%
Does not go to the locations that I need	91	33%
Isn't a direct route to the locations that I need / transfers take too long	76	27%
Not available during the times of day that I need	59	21%
Public transit not available during the days of the week I need	20	7%
Age/disability makes it difficult to use	13	5%
Total	280	137%

Responses exceed 100% because respondents were allowed to select multiple answers Respondents who answered "Not very satisfied" or "Not at all satisfied" were asked this question















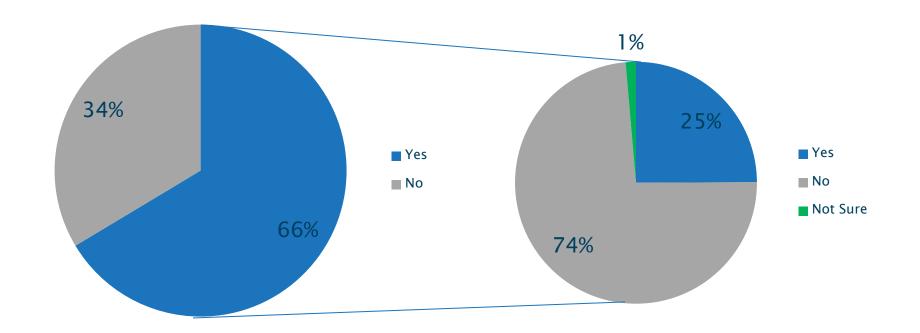






Inter-city bus service

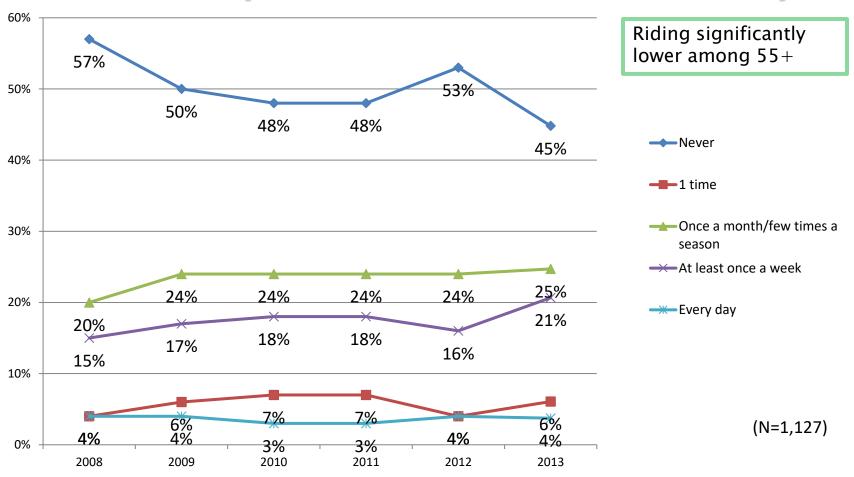
New tracking question in 2013



Aware of service (N=1092)

(HH) used service in past two years (N=724)

"Never biked" during the past season (Apr-Oct) at lowest in 6 yrs.















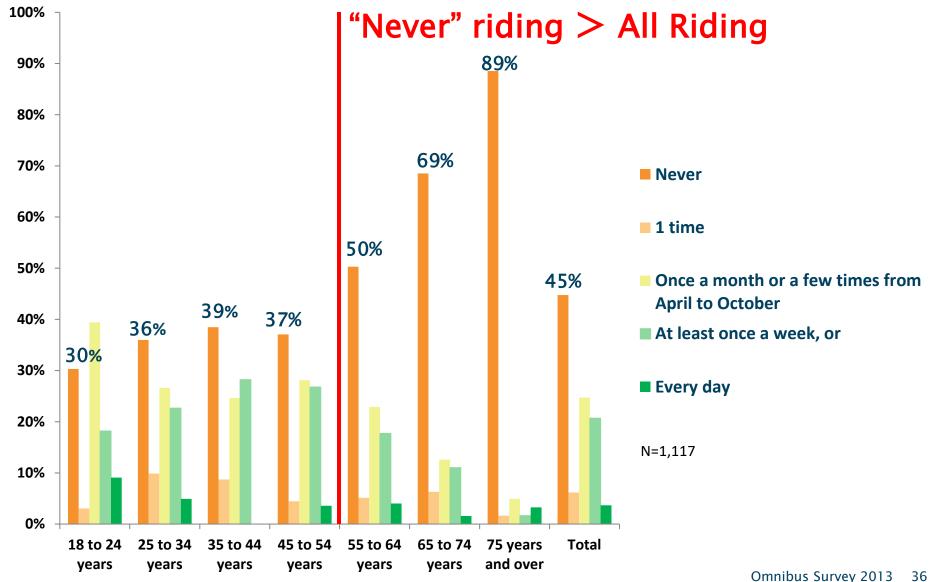








Majority of 54-and-under rode 1x or more















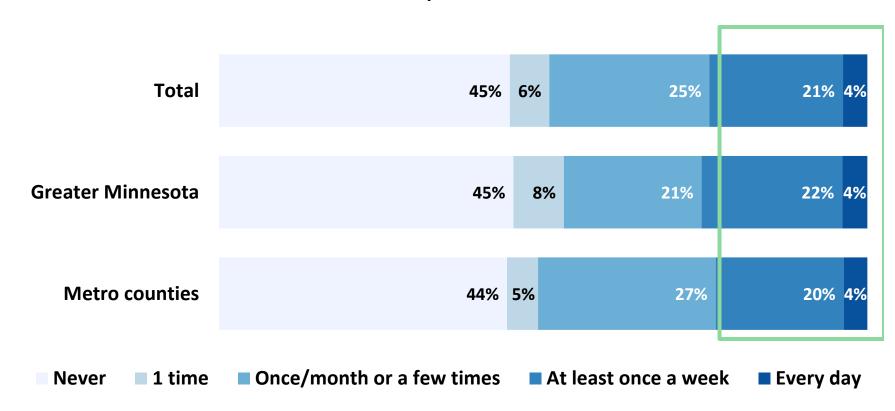






About 25% are frequent riders across Minnesota

On average, how often did you ride a bicycle in the past biking season (April to October) for any reason?



N= 1,117; M=628, GM=489











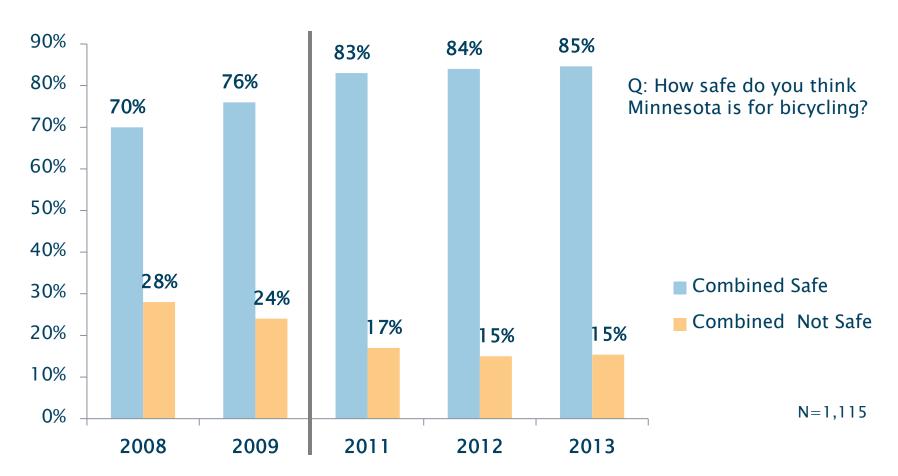








Perceptions of bike safety consistent since 2011













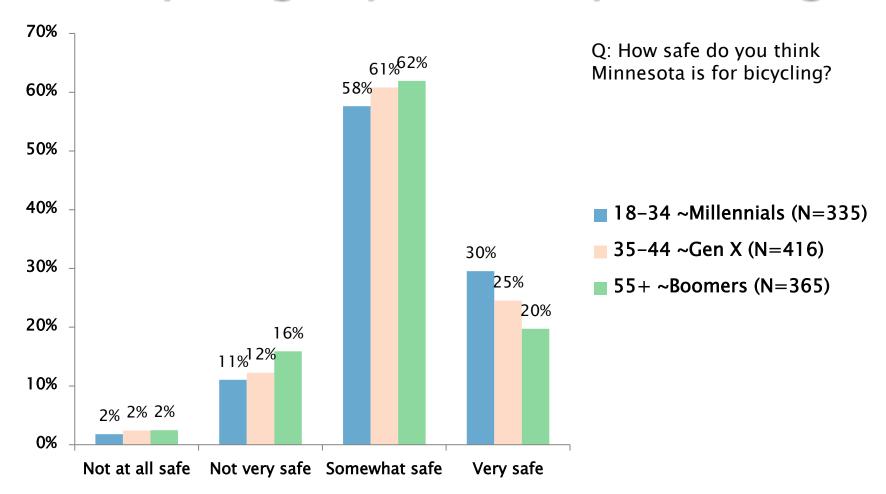








Millennials rate Minnesota as safer for bicycling, by a small percentage













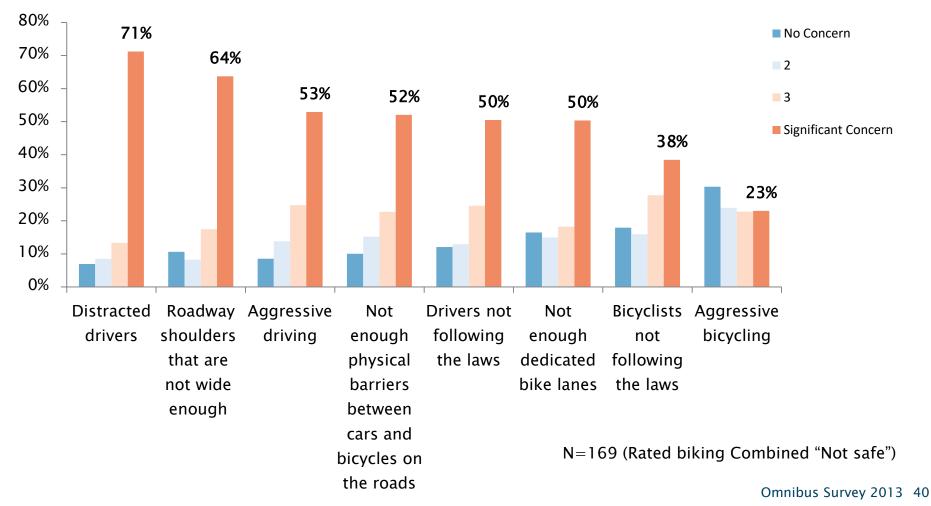








Drivers and infrastructure are strong concerns













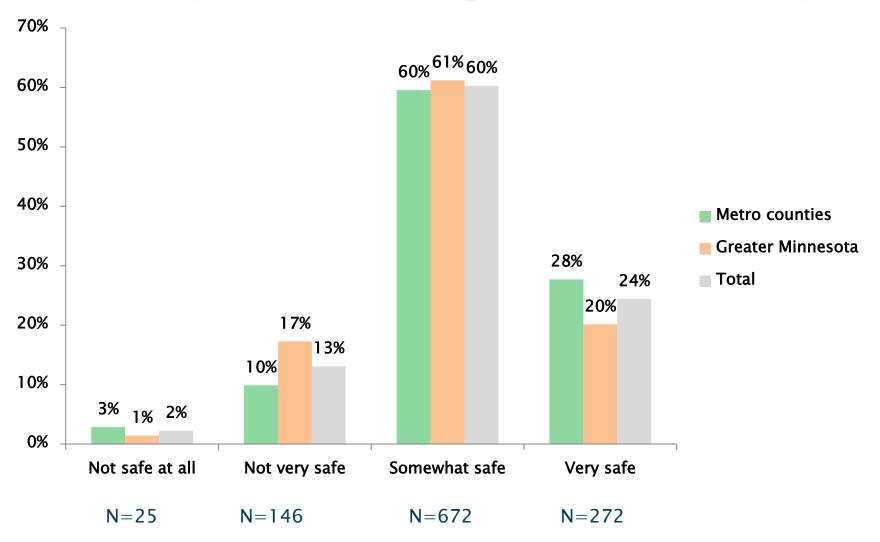








Metro perceives greater safety













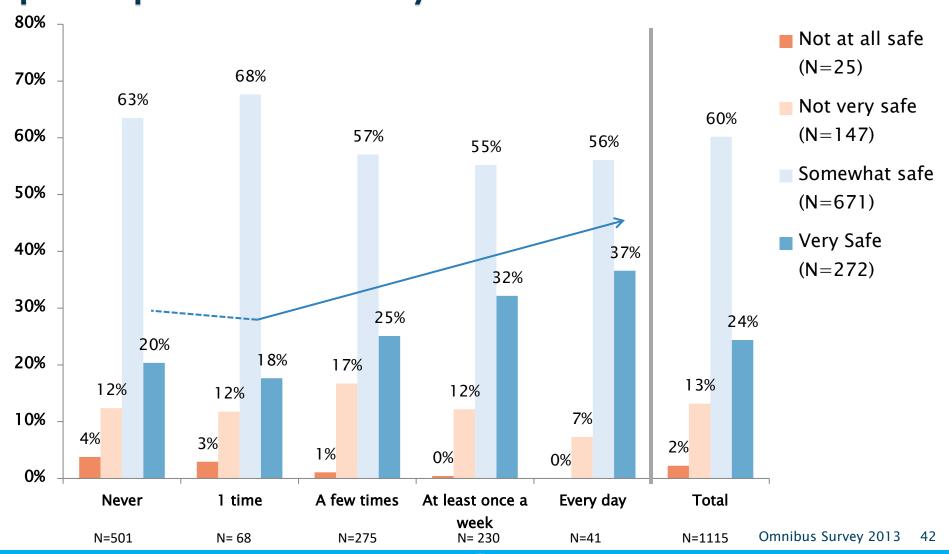








More frequent riding correlated with higher perception of safety















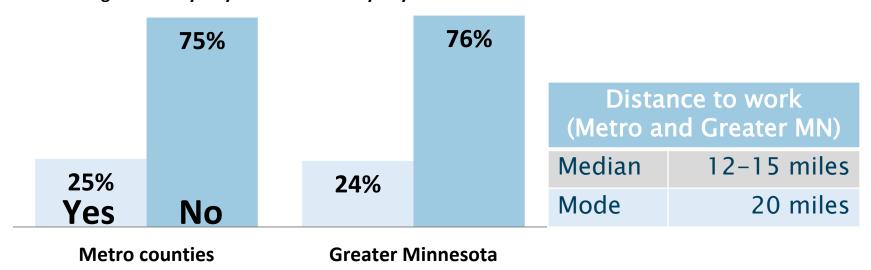






3/4 say work is too far to bike

Do you live close enough to your workplace that you would consider commuting to work by bicycle even a few days a year?



Metro (37%) > GM (16%) would consider biking to *school*. Median and mode are 20 miles*

* N=72 (Students who commute to school)















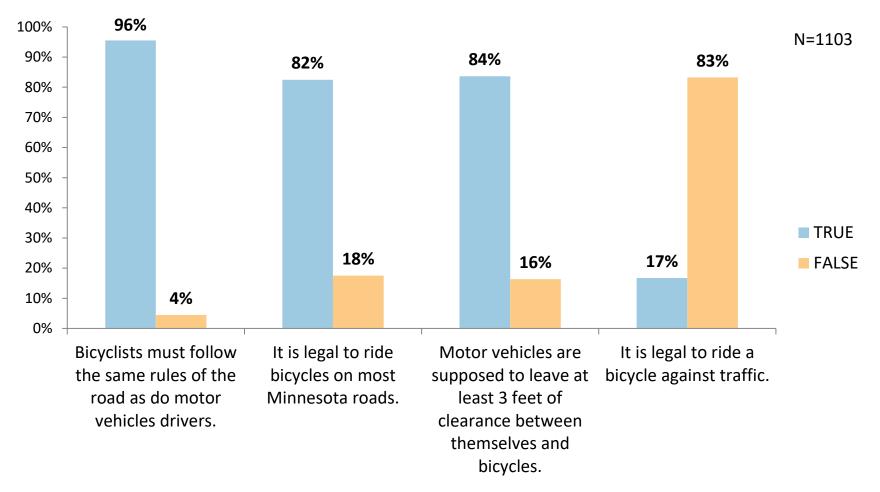








Over 4 in 5 know bike laws













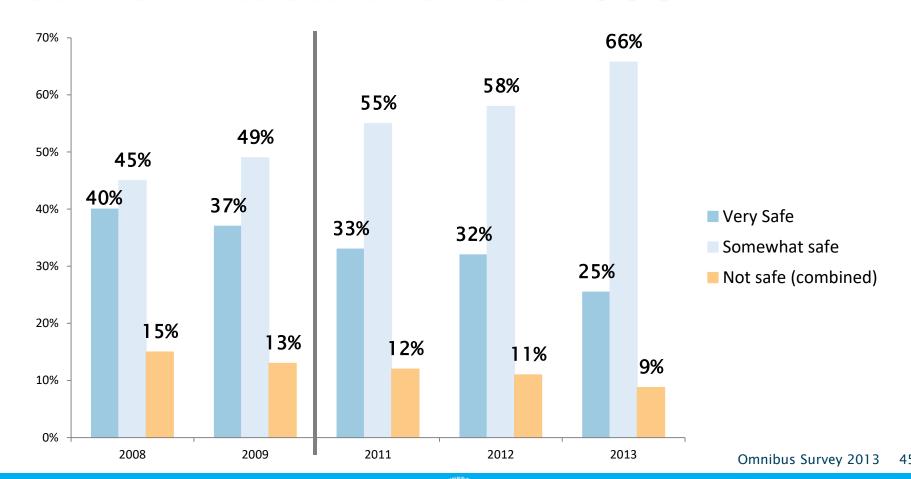








Perception of pedestrian safety decreasing from "very safe" to "somewhat safe" since 2008.





















Almost 3 in 4 know Crosswalk law

Q: Have you ever heard that Minnesota has a pedestrian crossing law that requires drivers to always stop for pedestrians?

N = 1127

Yes, you've heard of it	807	73%
You may have heard of it but are not sure	186	17%
No, you've not heard of it	120	11%

This is down from the ~80%/ "Yes" in 2012 Omnibus and the 2012 HEAT survey.













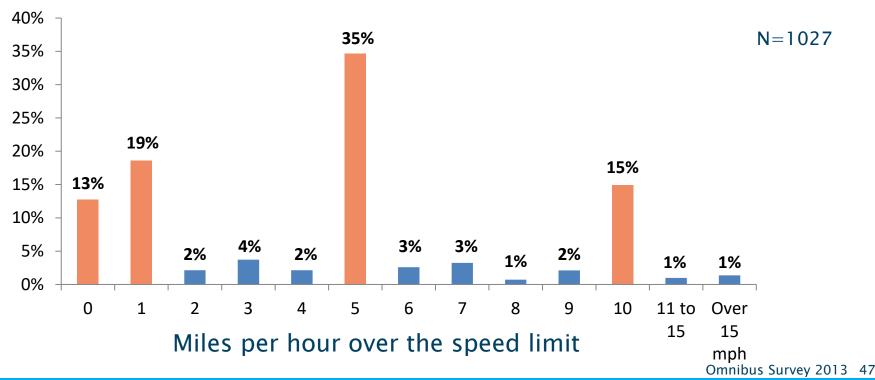






Majority not directly aware of Dimler

Q: On a 55- or 60-mile per hour road, how many miles per hour over the speed limit can someone be driving before a ticket is issued and placed on his or her driving record (and insurance is notified)?





















Zipper Merge trending















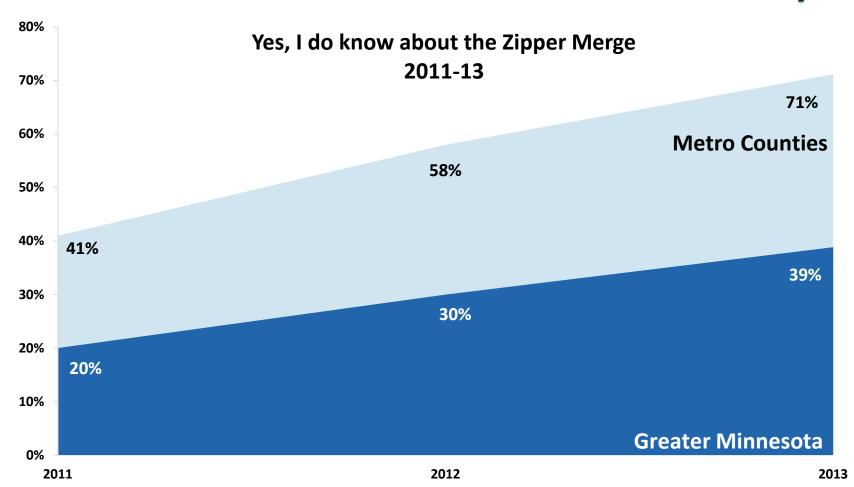






Omnibus Survey 2013 48

Knowledge of ZM has substantially increased across the state in 2+ yrs.















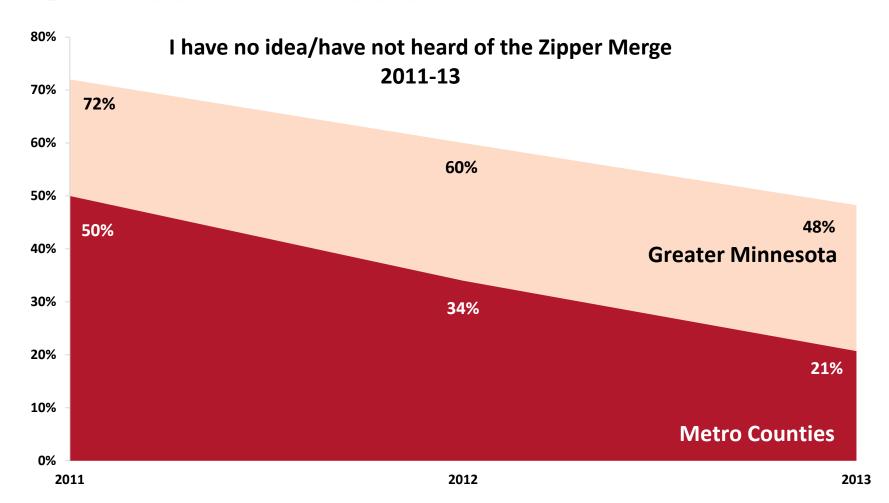








About half haven't heard of it in Greater Minnesota

















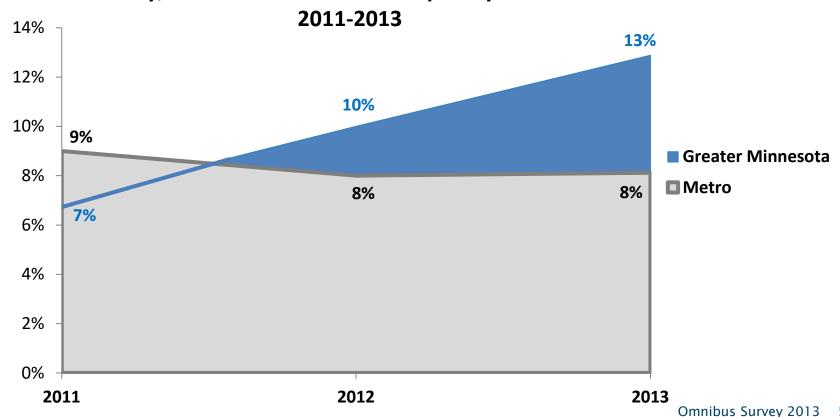






"Not sures" are increasing in GM, with Metro staying constant

Partially, but the details aren't completely clear to me

















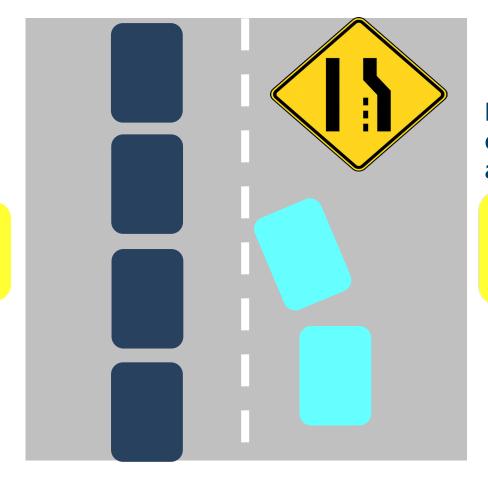




Despite high awareness, about 1 in 3 are zipper merging

Stay in line

61% TOTAL 68% Greater MN 57% Metro



Drive in the open lane and merge

36% TOTAL 29% Greater MN 39% Metro

> N = 747"Aware" and "Partial"



















Opinions on Transportation Funding

Q1: Investment in transportation

Q2: Support for raising taxes

Q3: How much more would you pay?

Q4: Level of support for indexing the gas tax



















Support "investment," not taxes

Good level of agreement for investing more, in general (60-85%)

 No significant differences between Metro and Greater Minnesota

Raising taxes: Overall support is at most 50%, and it's weak

Slightly more support in Metro

Indexing gas tax: Support is lower

 More support in Metro (44% at best) than in Greater Minnesota (37%)



















Fairly strong agreement on need to invest in transportation system

Very consistent by geography

Strongly Agree	356	32%	٦	
Agree	297	27%		-85%
Somewhat Agree	297	27%		
Somewhat Disagree	98	9%		
Disagree	21	2%		
Strongly Disagree	46	4%		
TOTAL	1,115	100%		
Don't know/Refused	12			

Q: To serve Minnesota residents and businesses, we need to invest significantly more in our transportation system than we have been investing in the past.

Omnibus Survey 2013 55











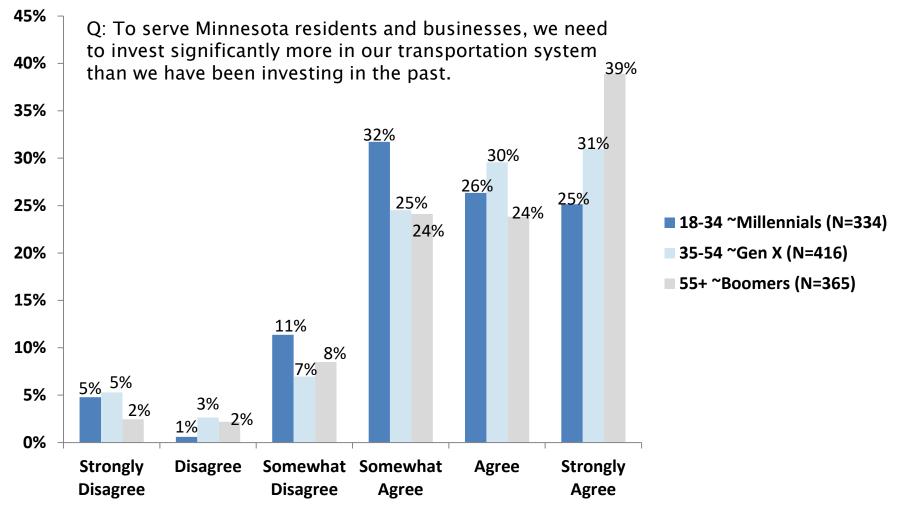








Informing Millennials













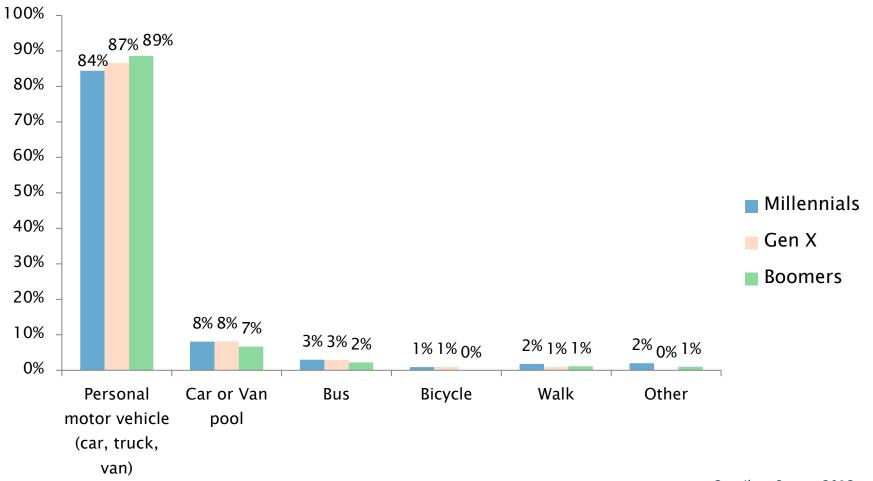








Consistency among transportation modes by generation; mostly cars

















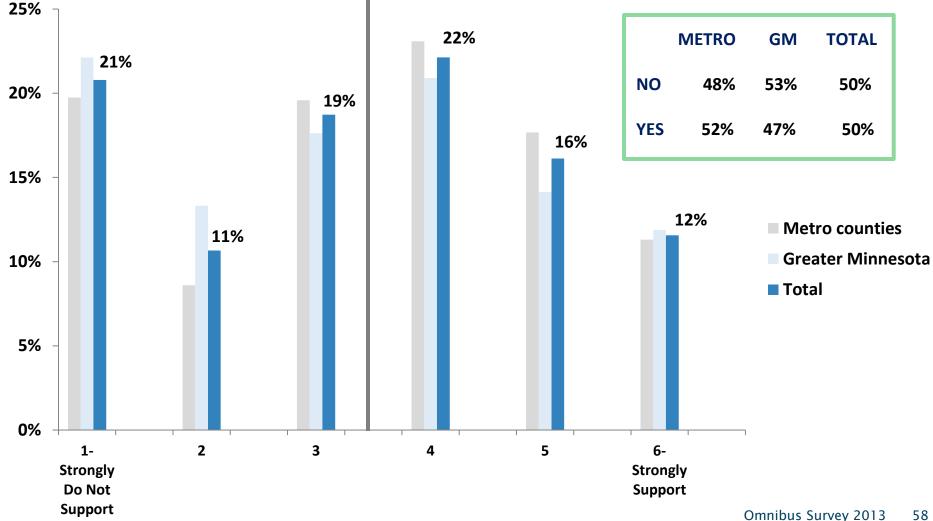




57

Support for raising taxes at 50%

Q: To what extent would you support raising taxes for the purpose of maintaining and building roads, bridges, [transit], and trails, in all regions of the state?





















0 to 5*

* How many more cents, willing to pay above \$.285

Mean, Median, and Mode by All demographics ~25% responded "\$0"

Exceptions (slightly higher mean):

- Some age groups (18–24, 45–64)
- Men
- Metro
- Variation among income levels; no pattern N=1,020











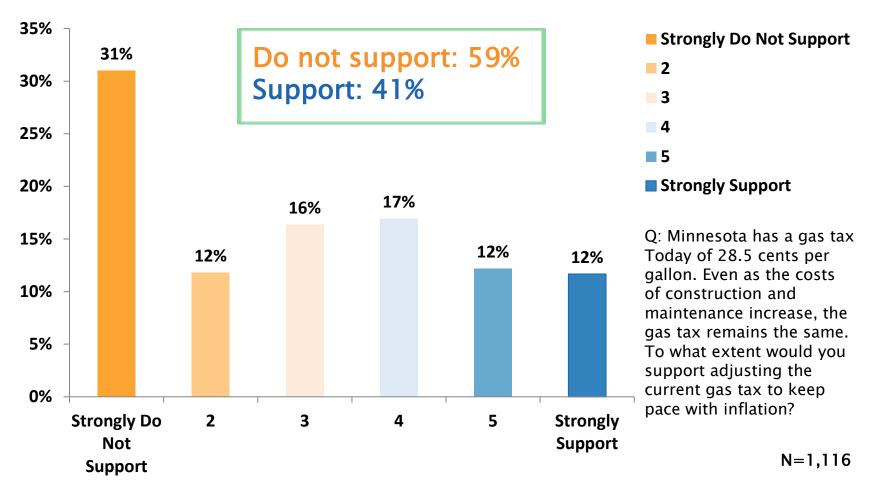








Support levels for gas tax indexing













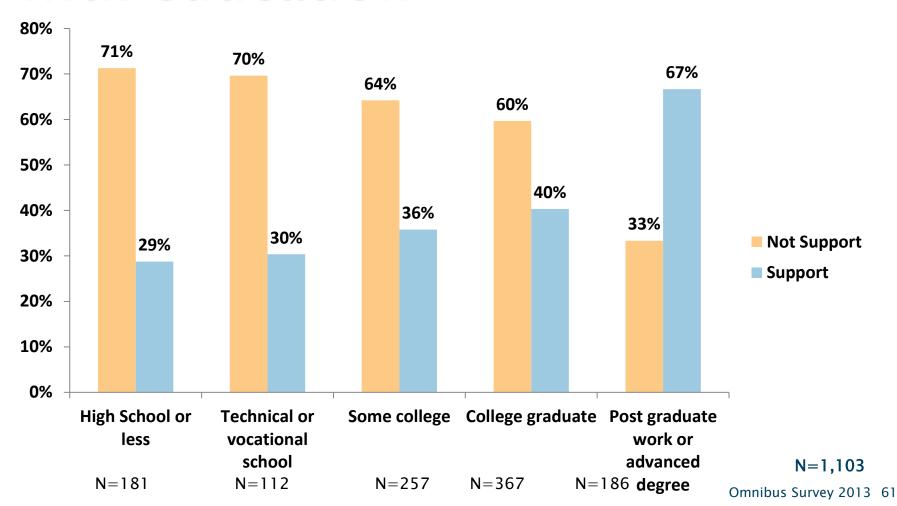








Support for indexing increases with education





















Implications and Strategies

- Public education/reassurance regarding current Minnesota bridge status and safety
- Reassure the public that MnDOT is making the right investment decisions with the resources we have
- Continue progress on construction project communication, multiple strategies (websites, 511 improvements, roadway signage, etc.

Comprehensive, user-friendly, timely, accurate

- Continue multi-modal focus on transit options, bicycle and pedestrian safety (infrastructure, education, etc.), now and for the long-term, to meet the public's growing expectations
- Potential education regarding indexing, and consider separate outreach to Millennials around the need to plan and invest for the future

Omnibus Survey 2013 62

















