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SDDOT 2021 Statewide Customer Satisfaction Assessment

**Study SD2021-02
Final Report**

**Prepared by
ETC Institute**

July 2022

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| | | | |
|----------------------|------------------------------------|-------------------------|-------------------------------|
| Thad Bauer..... | Research | Courtney McDonald | Bridge Design |
| Taylor Brusven | Finance & Management | Julie Stevenson ... | Finance & Management |
| Jack Dokken | Air, Rail, & Transit | John Villbrandt | Mobridge Area |
| David Huft | Intelligent Transportation Systems | Tammy Williams .. | Planning & Engineering Admin. |
| Jason Humphry | Pierre Region | Rich Zacher | Custer Area |
| Mark Leiferman | Project Development | | |

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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 ninth 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 1,467 residents, 255 truckers/shippers, 81 emergency vehicle operators, 237 farmers/ranchers, 278 senior citizens, 31 state legislators, and 211 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 to respond to the needs of its customers over time.</p> | | | |
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TABLE OF ACRONYMS

| Acronym | Definition |
|---------|---|
| SDDOT | South Dakota Department of Transportation |

1.0 EXECUTIVE SUMMARY

1.1 Purpose

In 2021, 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, and 2018.

1.2 Objectives

The 2021 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 quality of the Department of Transportation's key products and services. This objective was addressed by asking customers to objectively assess the Department's performance in key areas of service delivery. 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 key business partners 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 D, which contains the results of the Contractor survey, and Appendix G, which contains the results for each of the other key customer groups surveyed.
3. To assess progress in 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 its customers have of the Department. 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. 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 2022 SDDOT Customer Satisfaction Assessment consisted of ten major tasks. Each of these tasks is described below:

2.1 Task 1: Initial Meeting

In August 2021, 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, and (3) the focus groups. The project's technical panel provided input on the scripts during the month of July. The scripts were all finalized in late August 2021.

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 fall of 2021.

2.3.1 External Stakeholder Interviews

ETC Institute administered an external stakeholder survey online with 51 leaders of organizations outside the Department of Transportation who use transportation services or influence transportation decisions in the State of South Dakota. The surveys were also conducted during the month of September 2021. 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 A. Selected findings are listed below:

- Most (43 of 51 respondents) of the external stakeholders rated the quality of South Dakota highways as either "excellent" or "good," seven rated the quality as "average," and one respondent gave a "poor" rating.
- Snow removal, communication, and roadway maintenance were the three things mentioned most frequently by external stakeholders as "things SDDOT does best."
- External stakeholders were asked to rate the value of services SDDOT provides for the State and Federal tax revenue the Department receives. Most (42 of 51) respondents indicated it

was either an “excellent” or “good” value, seven indicated it was “average” value, and two indicated they “don’t know.”

- Compared to five years ago, 36 of the 51 external stakeholders indicated that they thought South Dakota’s highway system had improved. Twenty-five (25) thought it had stayed about the same. None 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.
- Fifteen (15) of the 51 external stakeholders had used SDDOT’s social media accounts. Of these, 14 had used Facebook, five had used Twitter, and two had used Instagram. When asked how they would rate the usefulness of SDDOT social media presence, 14 of 15 rated their presence as “excellent” or “good,” and 1 gave a rating of “poor.”

2.3.2 Internal Stakeholder Interviews

ETC Institute conducted one-on-one interviews with 38 senior SDDOT managers during September 2021. 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 B. Selected findings are listed below:

- Every member of the Executive Team rated the overall quality of the State’s transportation system as good (18 members) or excellent (20 members).
- All members of the Executive Team thought SDDOT’s previous surveys had been valuable to the Department; 22 of 38 thought previous surveys has been “very valuable” to the Department.
- Most (30 of 38) of the senior managers who were interviewed thought the State’s transportation system had gotten better over the past five years. Eight (8) thought it had stayed about the same.
- Pavement management, winter maintenance, and fiscal responsibility were mentioned frequently by members of the Executive Team as strengths of SDDOT.
- Communication and staffing-related issues were two areas that were mentioned frequently by members of the Executive Team as opportunities for improvement.
- Being prepared to respond to changing transportation needs in the future, such as those created by electric and autonomous vehicles, was viewed by several members of the Executive Team as one of the biggest challenges for the Department over the next 5-10 years.

2.4 Task 4: Conduct Focus Groups

Conduct focus groups. ETC Institute facilitated 12 focus groups with more than 100 participants for the South Dakota Department of Transportation (SDDOT) during the week of Sept. 21-24, 2021. The focus groups were conducted virtually, and participants were randomly selected to ensure good representation from the entire State. Residents from more than 40 counties participated. The twelve groups included the following:

- 1 group with residents from the Mitchell Region

- 1 group with residents from the Pierre Region
- 1 group with residents from the Rapid City Region
- 1 group with residents from the Aberdeen Region
- 1 group with residents of the City of Sioux Falls to focus on urban issues
- 1 group with residents of the City of Rapid City to focus on urban issues
- 2 groups with a random sample of seniors/persons with disabilities
- 1 group with farmers/ranchers
- 1 group with truckers/shippers
- 1 group with contractors
- 1 group with emergency vehicle operators

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
- The Impact of Technology/COVID-19 on Transportation Needs
- Economic Development
- Public Information/Communication
- Value Provided by SDDOT

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 October 2021. The full summary of the focus group findings is provided in Appendix C.

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 November 2021.

2.7 Task 7: Conduct Surveys

The South Dakota Department of Transportation (SDDOT) conducted a statewide survey of residents and key customer groups during the fall of 2021. 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 1,467 South Dakota residents during November-December 2021. 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 1,467 respondents has a 95% level of confidence with a precision of at least +/-2.6%. Figure 1 below shows the location of respondents to the survey.

Methodology

- Random sample of residents
- Oversampling of key customer groups, including:
 - State legislators, truckers/shippers, and emergency vehicle operators
- Survey was administered by mail, email, text, and phone
- Goal: 1,000 completed surveys
- Actual: 1,467 completed surveys
- Overall results have a precision of +/-2.6% at the 95% level of confidence

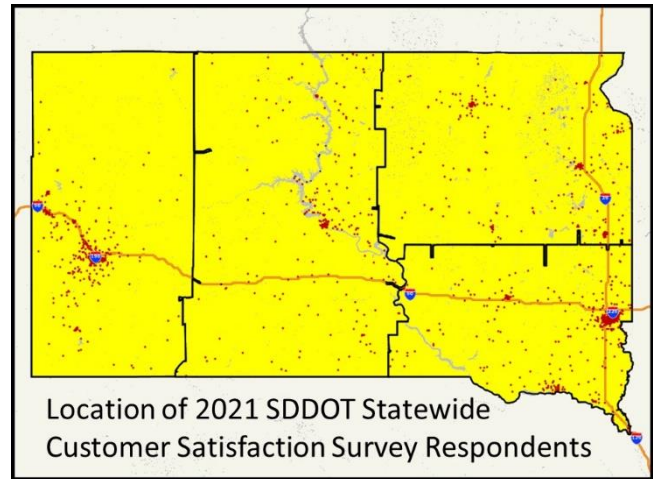


Figure 1: GIS Location Map of Respondents

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:

- 278 Seniors (age 65+)
- 255 Truckers/shippers
- 237 Farmers/Ranchers
- 81 Emergency Vehicle Operators
- 31 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 211 contractors completed the contractor survey online. The sample of 211 contractors has a 95% level of confidence with a precision of at least +/- 6.9%.

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

In February 2022, ETC Institute conducted a webinar during which the results and analysis of all surveys were presented. The presentation included the following:

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 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 geographic information systems (GIS), which allowed ETC Institute to prepare maps that show overall satisfaction with specific SDDOT services. The maps are provided in Appendix E 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 Aberdeen) 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 F.

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

On May 24, 2022, 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 2021 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 rural divided highways in South Dakota are listed below.

- Overall, 86% of residents indicated they were satisfied with Interstate and rural divided highways in South Dakota, 11% were neither satisfied or dissatisfied (neutral), and 3% indicated they were dissatisfied.
- The condition of guardrails (93%), roadside care (89%), and directional, regulatory, and informational signage (88%) received the highest levels of satisfaction among the 13 items that were rated.
- Residents indicated they were least satisfied with the frequency of rest areas (65%) and the smoothness of the surface of highways (69%).

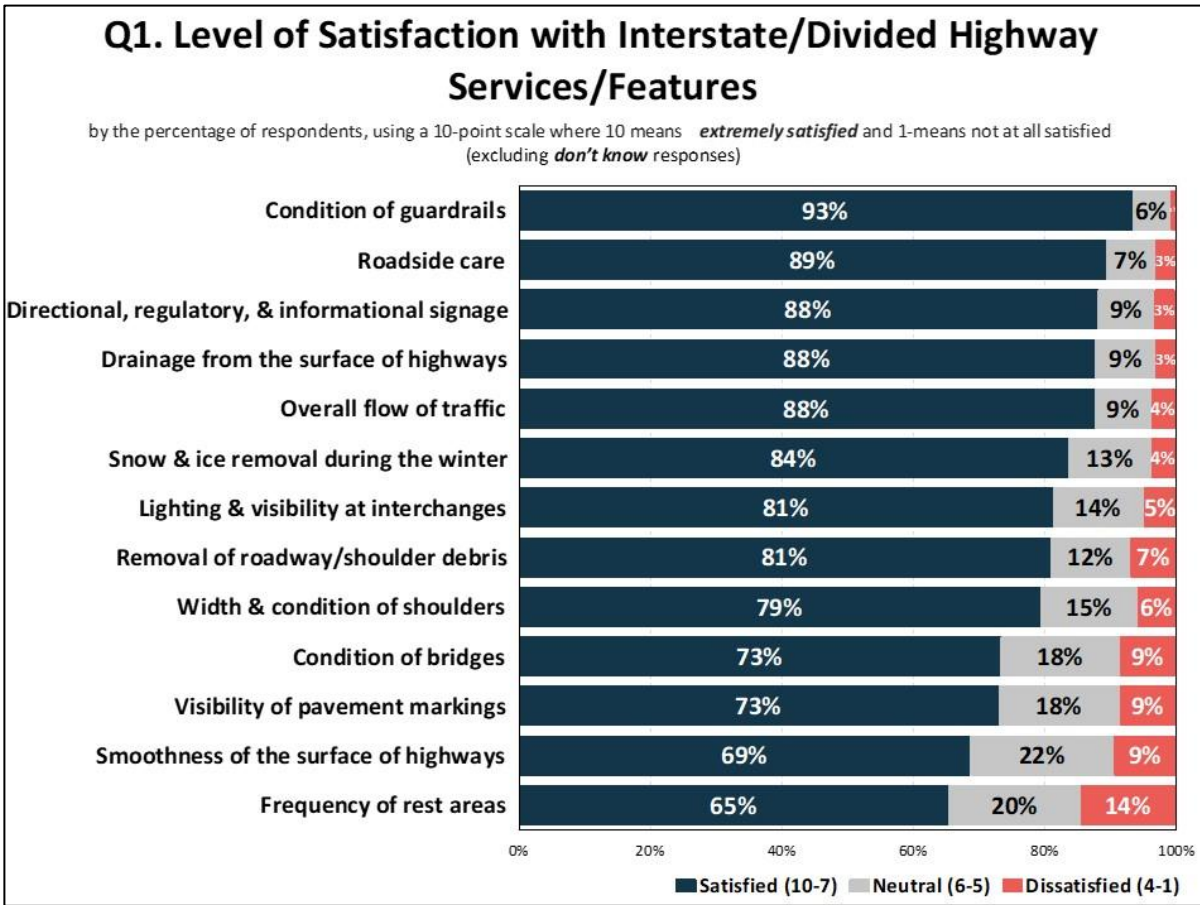


Figure 2: Interstate and Rural Divided Highways Ratings

Trends from 2018-2021

- Overall satisfaction with Interstate and rural divided highways in South Dakota increased by 10% from 76.5% in 2018 to 86.5% in 2021.
- Since 2018, satisfaction increased in 12 of the 13 areas. The only decrease involved satisfaction with the condition of bridges, which decreased by 0.9%.
- Areas for which satisfaction increased by 5% or more in the following areas:
 - Removal of roadway/shoulder debris (9.0%)
 - Roadside care (7.0%)
 - Drainage from surface of highways (6.6%)
 - Directional, regulatory, and informational signage (5.6%)
 - Smoothness of surface of highways (5.3%)
 - Snow and ice removal during the winter (5.2%)

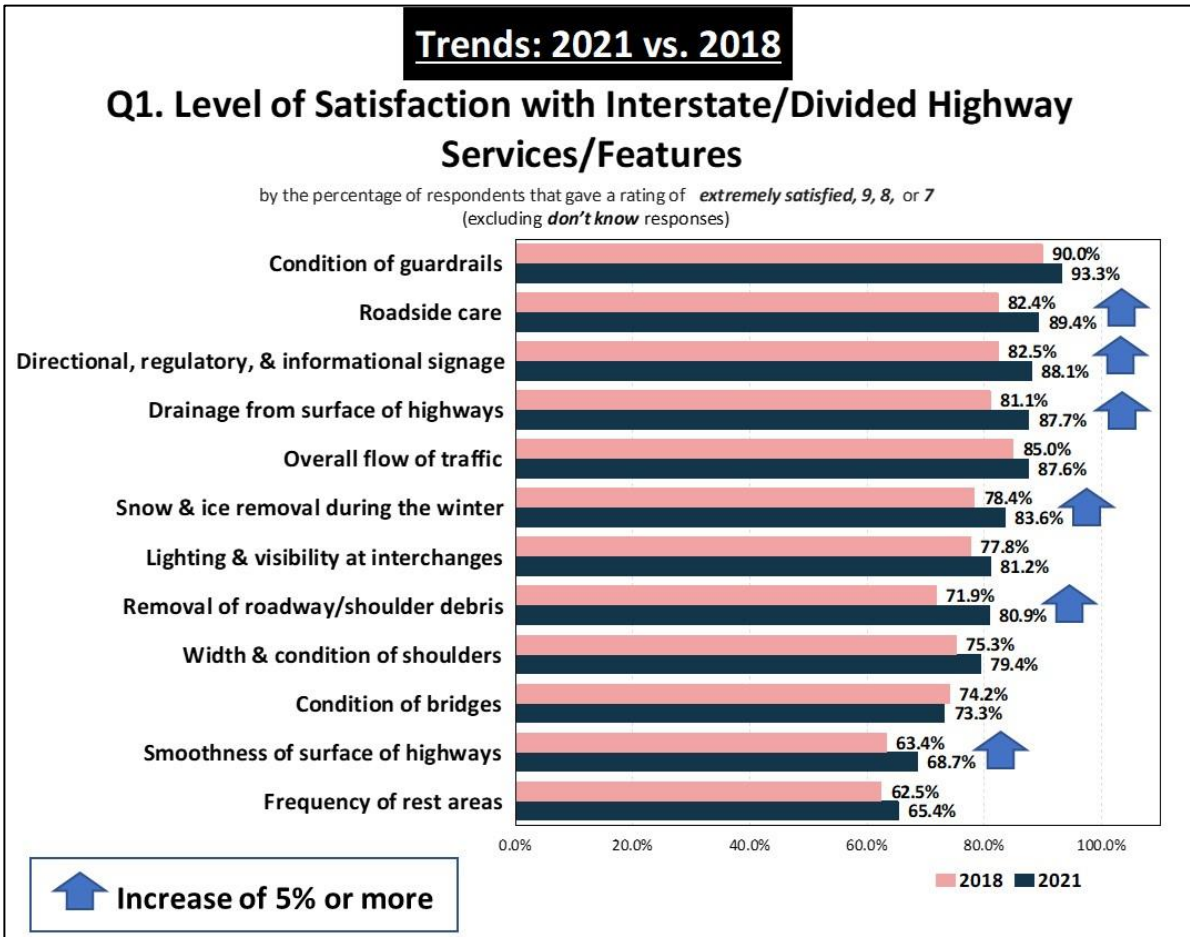


Figure 3: Satisfaction with Interstate and Divided Highway Services and Features (Trends)

Satisfaction by Key Customer Group

The table to the right shows the satisfaction levels among key customer groups in the top three areas of Interstate and rural 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 F has the ratings by customer group for all areas that were assessed.

| Q1. Interstate and Divided Highway Services and Features | | | |
|--|-------------------------------|-------------------------------|--|
| Customer Group | Most Satisfied | Second Most Satisfied | Third Most Satisfied |
| Emergency Vehicle Operator | Condition of guardrails (92%) | Overall flow of traffic (86%) | Roadside care (85%) |
| Rancher | Condition of guardrails (92%) | Overall flow of traffic (89%) | Directional, regulatory, & informational signage (89%) |
| Senior | Condition of guardrails (95%) | Roadside care (94%) | Drainage from the surface of highways (92%) |
| Trucker | Condition of guardrails (93%) | Overall flow of traffic (88%) | Drainage from the surface of highways (85%) |
| Overall | Condition of guardrails (93%) | Roadside care (89%) | Directional, regulatory, & informational signage (88%) |

Figure 4: Satisfaction with Interstate and Divided Highway Services and Features Among Key Customer Groups

3.2 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, 72% of residents indicated they were satisfied with two-lane and undivided highways in South Dakota, 21% were neither satisfied or dissatisfied (neutral), and 7% were dissatisfied.
- The condition of guardrails (86%), roadside care (81%) and the overall flow of traffic (80%) 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 width and condition of shoulders (58%), smoothness of surface of highways (57%), and the frequency of rest areas (48%).

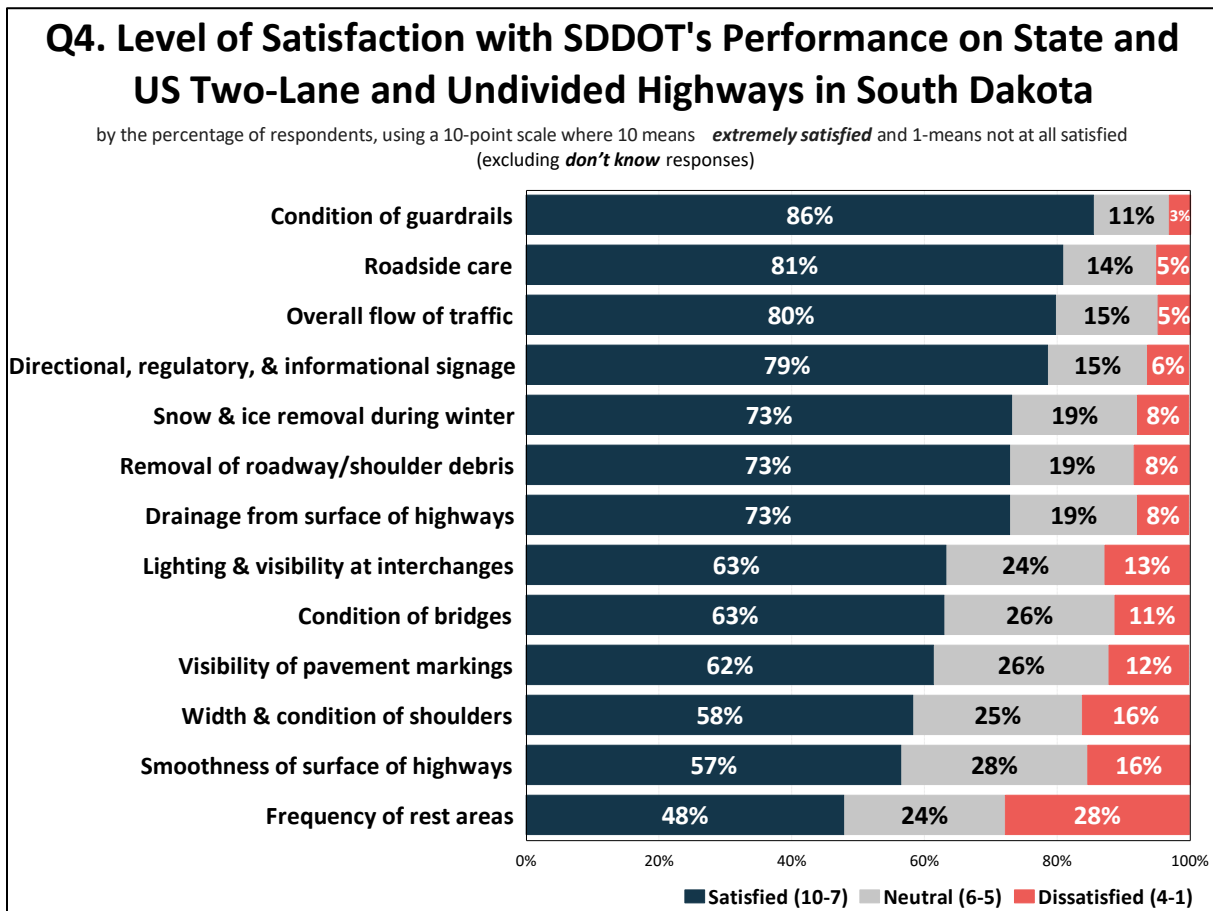


Figure 5: Two-Lane and Undivided Highway Ratings

Trends from 2018-2021

- Overall satisfaction with two-lane and undivided highways in South Dakota increased by 11.9% since 2018.

- Since 2018, satisfaction increased by at least 5% or more in the following eight areas:
 - Snow and ice removal (9.6%)
 - Roadside care (8.6%)
 - Removing roadway and shoulder debris (7.7%)
 - Width and condition of shoulders (7.5%)
 - Smoothness of surface of highways (7.2%)
 - Directional, regulatory, and informational signage (5.9%)
 - Condition of guardrails (5.8%)
 - Drainage from surface of highways (5.3%)

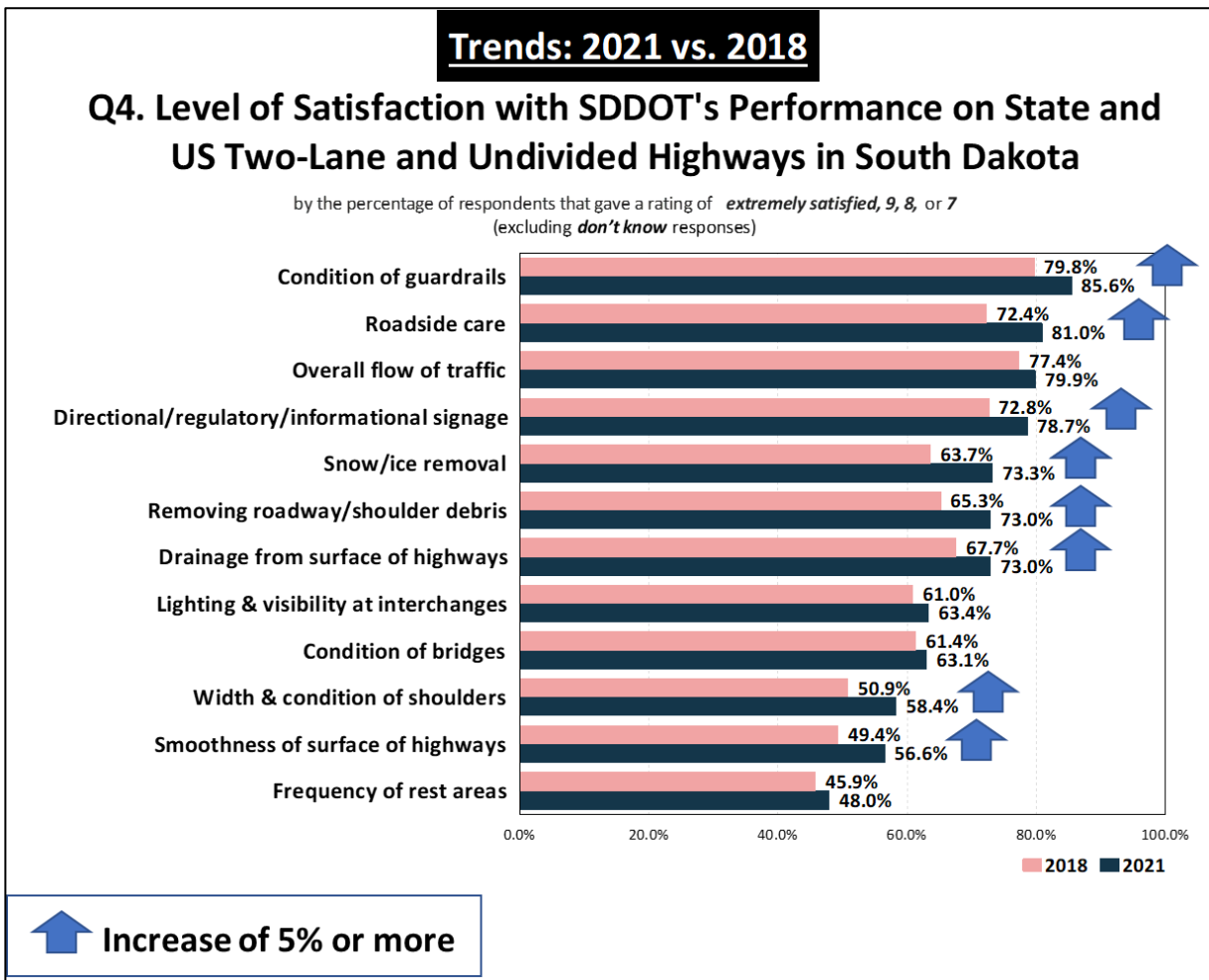


Figure 6: Two-Lane and Undivided Highway Ratings (Trends)

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 F has the ratings by customer group for all areas that were assessed.

| Q4. Two-Lane and Undivided Highway Services and Features | | | |
|---|-------------------------------|--|--|
| Customer Group | Most Satisfied | Second Most Satisfied | Third Most Satisfied |
| Emergency Vehicle Operator | Condition of guardrails (82%) | Overall flow of traffic (75%) | Directional, regulatory, & informational signage (73%) |
| Rancher | Condition of guardrails (87%) | Roadside care (82%) | Overall flow of traffic (81%) |
| Senior | Roadside care (88%) | Condition of guardrails (87%) | Overall flow of traffic (85%) |
| Trucker | Condition of guardrails (85%) | Directional, regulatory, & informational signage (77%) | Roadside care (77%) |
| Overall | Condition of guardrails (86%) | Roadside care (81%) | Overall flow of traffic (80%) |

Figure 7: Satisfaction with Two-Lane and Undivided Highway Services and Features among Key Customer Groups

3.3 Construction and Detours

Nearly all respondents (96%) 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 (78.6%) 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 7% since 2018. Residents in the Aberdeen 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.

| Q7a. Is the length of time you are delayed by work zones on highways in South Dakota acceptable? | | | | |
|---|-----------------|-----------------|---------------|-------------------|
| | Aberdeen | Mitchell | Pierre | Rapid City |
| %Sum of Always/Usually | 82.3% | 74.7% | 79.9% | 79.2% |

Figure 8: Length of Time Delayed by Work Zones on Highways Always/Usually Acceptable by Region

The majority (60%) of residents think SDDOT completes highway construction projects in a reasonable amount of time, 24% of residents do not think SDDOT completes highway construction projects in a reasonable amount of time, and 16% of residents “don’t know.” 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. Does SDDOT complete highway construction projects in a reasonable amount of time? | | | | |
|---|-----------------|-----------------|---------------|-------------------|
| | Aberdeen | Mitchell | Pierre | Rapid City |
| %Yes | 58.5% | 59.5% | 67.1% | 55.4% |
| %No | 41.5% | 40.5% | 32.9% | 44.6% |

Figure 9: 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, 88% of residents feel safe on State, U.S., and Interstate highways, which was an increase of 8.9% since 2018.
- Compared to five years ago, 47% of residents think State, U.S., and Interstate highways are either “much safer” or “safer”; 40.7% think they are about the same, 10.8% think they are somewhat more dangerous, and 1.7% think they are much more dangerous.
- Over three-quarters (78%) of residents feel safe when driving through work zones on State, U.S., and Interstate highways in South Dakota.
- Most (86%) of residents either “strongly agree” or “agree” that SDDOT does a good job of providing signage in work zones. The map below shows that the ratings for safety in work zones was rated high in all areas of South Dakota.

Q8-01. I feel safe when driving through work zones on South Dakota State, US, and Interstate highways

(Shading Reflects the Mean Rating by SDDOT Regions)

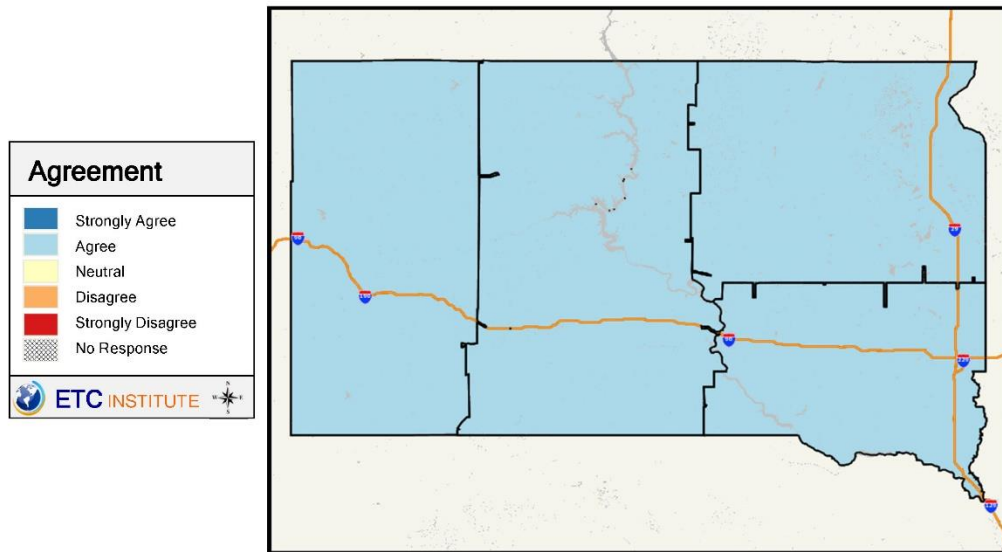


Figure 10: Regional Highway Safety Ratings

- Sixty-two percent (62%) of the residents surveyed thought that “distracted drivers” was the biggest safety concern on highways, 56% thought it was “winter conditions,” and 38% thought it was “rough roads.” Residents were significantly more concerned with traffic congestion and construction zones in 2021 than they were in 2018.

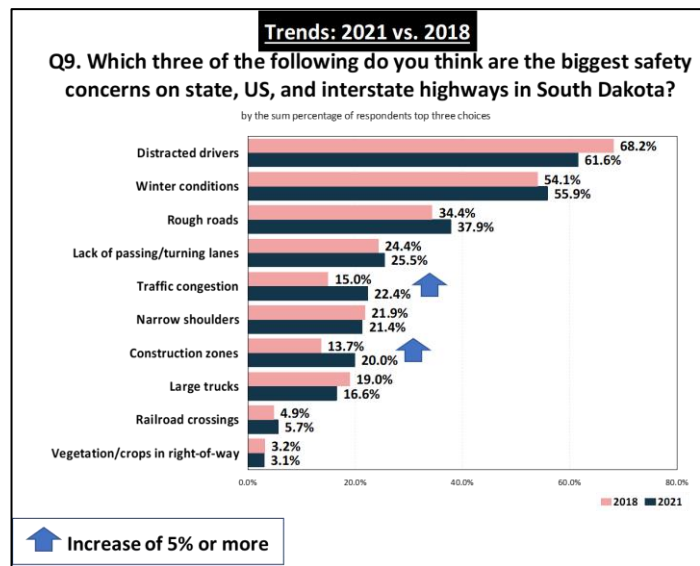


Figure 11: Biggest Safety Problems on State Highways

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 below.

- Satisfaction with SDDOT’s effort to keep residents informed about road conditions has increased 35.8%. SDDOT’s efforts to alert residents about delays and alternative routes caused by construction projects has increased 12.3% since 2018. This was the largest increase among more than 100 areas that were assessed on the survey. The changes in satisfaction from 2018 to 2021 are shown in the chart below.

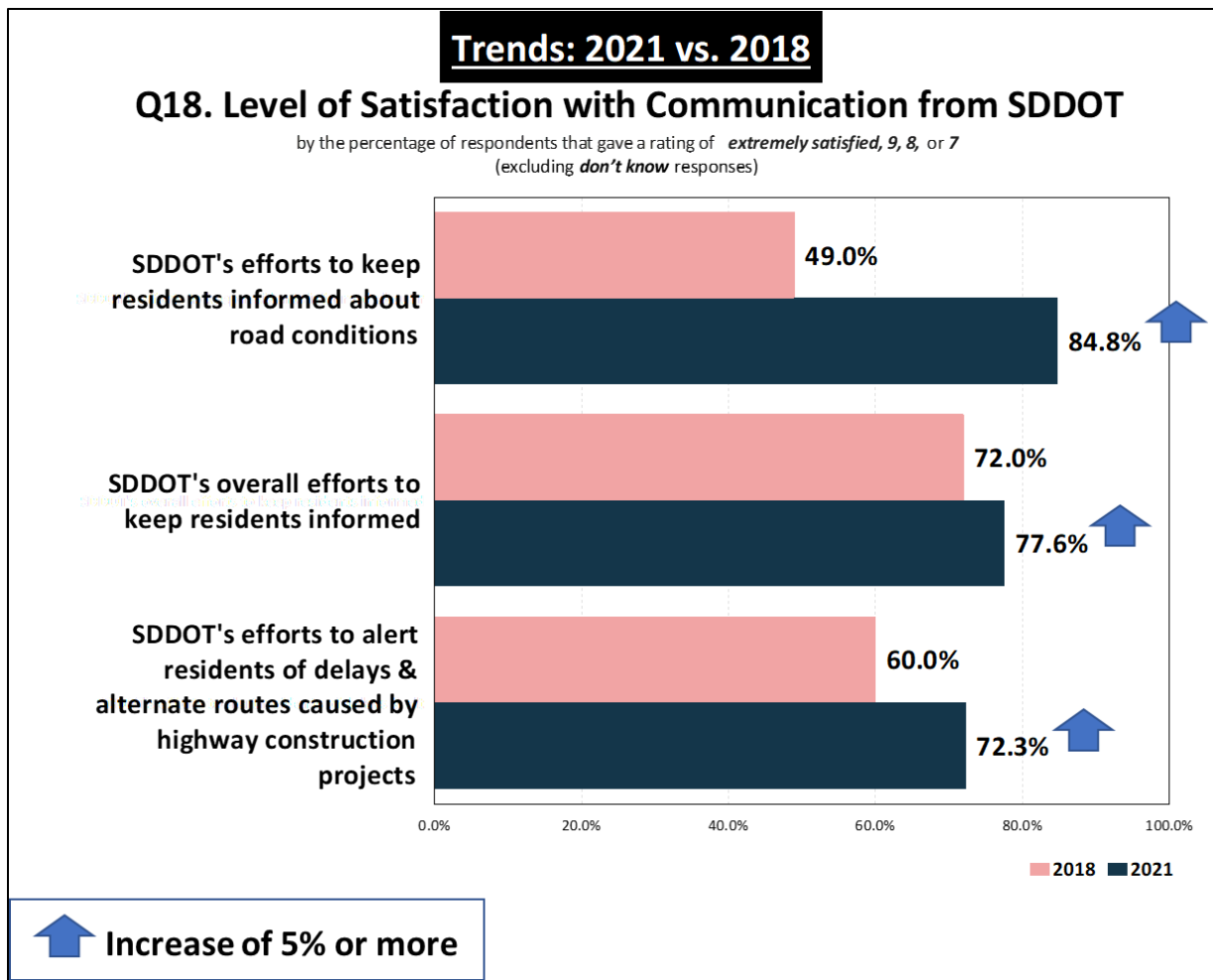


Figure 12: Satisfaction with Communication from SDDOT

- Most (90%) 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 (57%) and road closures/re-openings (55%).

- Twenty-five percent (25%) of residents most prefer SDDOT to share information to them through text or online through websites (24%).
- The majority (63%) 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 511 (91%) and SDDOT message boards along highways (91%).

3.6 Customer Service

One in eight (12.5%) of South Dakota residents indicated that they had contact with SDDOT employees during the past two years, which was up slightly from 11% in 2018. Among those who had contacted SDDOT employees, 73% of residents indicated they were either “very satisfied” or “satisfied” with the level of customer service provided by SDDOT; 13% gave a “neutral” rating, 12% were “dissatisfied,” and 3% were “very dissatisfied.” Although the percentage of residents who were “very satisfied” decreased from 2018, the overall percentage who were satisfied stayed about the same.

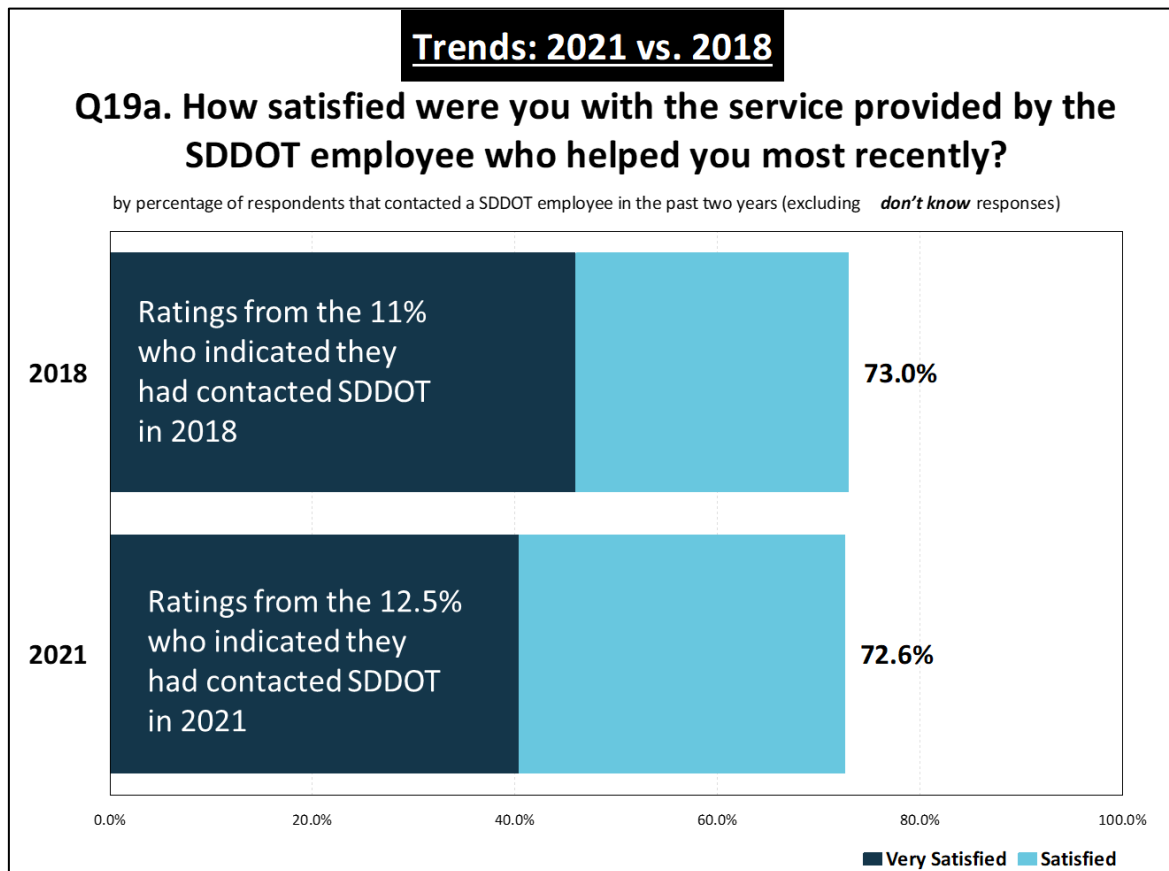


Figure 13: Satisfaction Ratings with Customer Service

3.7 Transportation Technology and Other Issues

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

- Fifty-one percent (51%) of residents think it is either “extremely important,” “very important,” or “important” to accommodate the use of electric vehicles and electric vehicle charging stations in South Dakota.
- Forty-nine percent (49%) of residents think it is either “extremely important,” “very important,” or “important” for the State to support developing infrastructure needed for connected and autonomous vehicles.

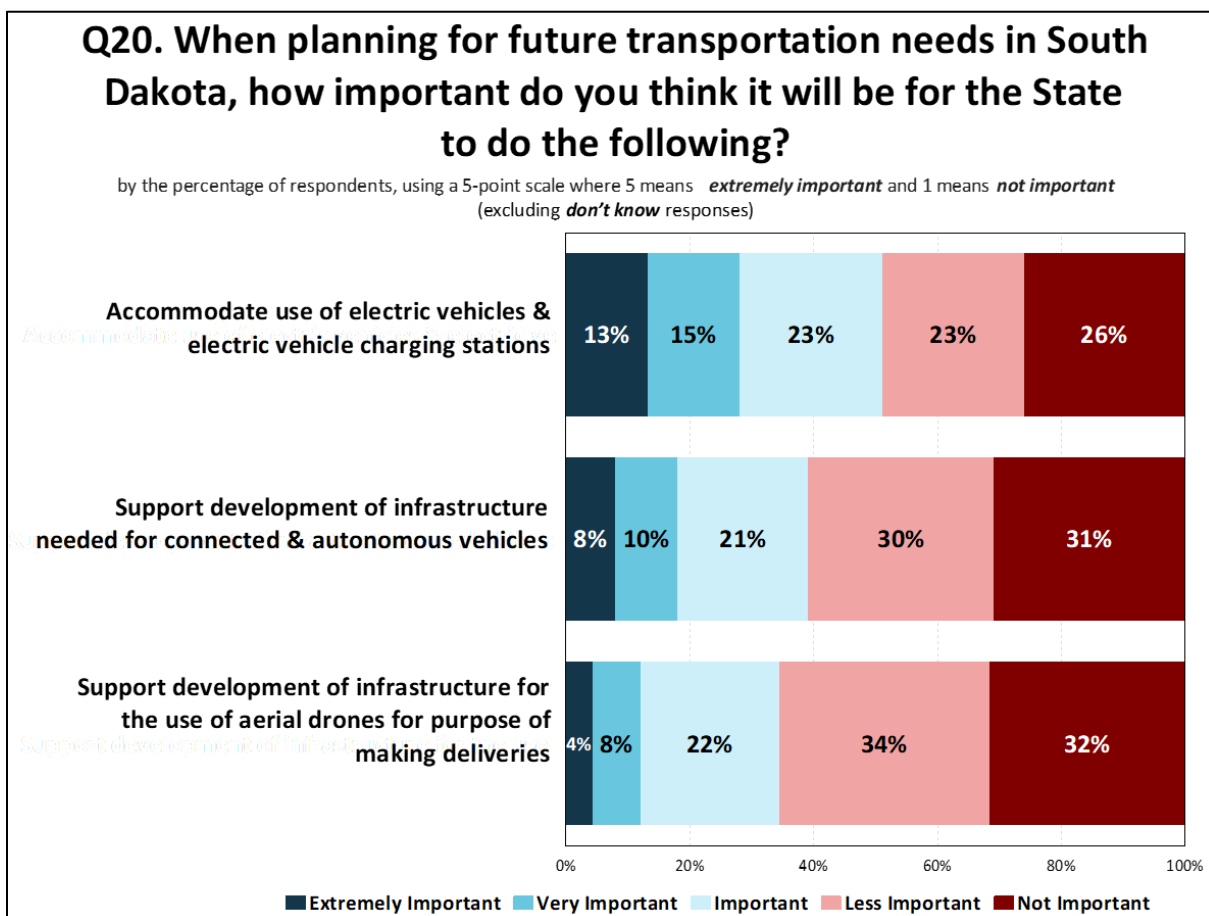


Figure 14: Importance of Future Transportation Needs

Plans for Electric Vehicle Ownership

- One in nine (11.2%) of South Dakota residents indicated that they plan to purchase an electric vehicle in the next five years. Young adults between the ages of 18 to 34 years were nearly twice as likely as seniors (age 65+) to be planning to purchase an electric vehicle in the next five years.

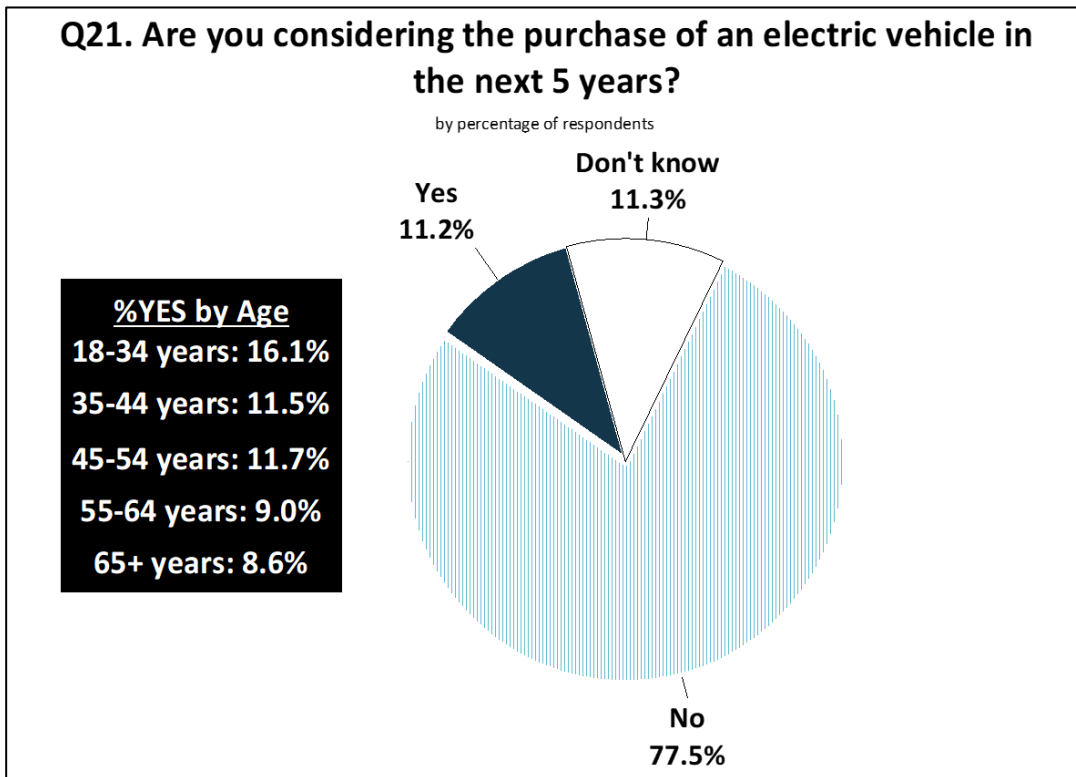


Figure 15: Plans to Purchase an Electric Vehicle in the Next Five Years

Plans to Work from Home

- Forty-four percent (44.1%) of residents who are employed anticipate working from home in the future, which is a 14% increase compared to the percentage who reported working from home at least one day per week before the COVID-19 Pandemic.

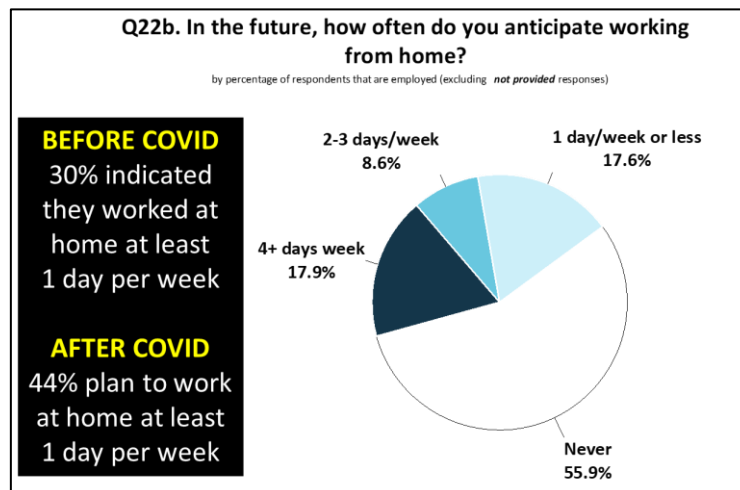


Figure 16: Residents Anticipating Working from Home in the Future

Perceptions of Rest Areas

- Satisfaction with South Dakota rest area(s) increased by 7.4% from 81.0% in 2018 to 88.4% in 2021 as shown in the figure below.

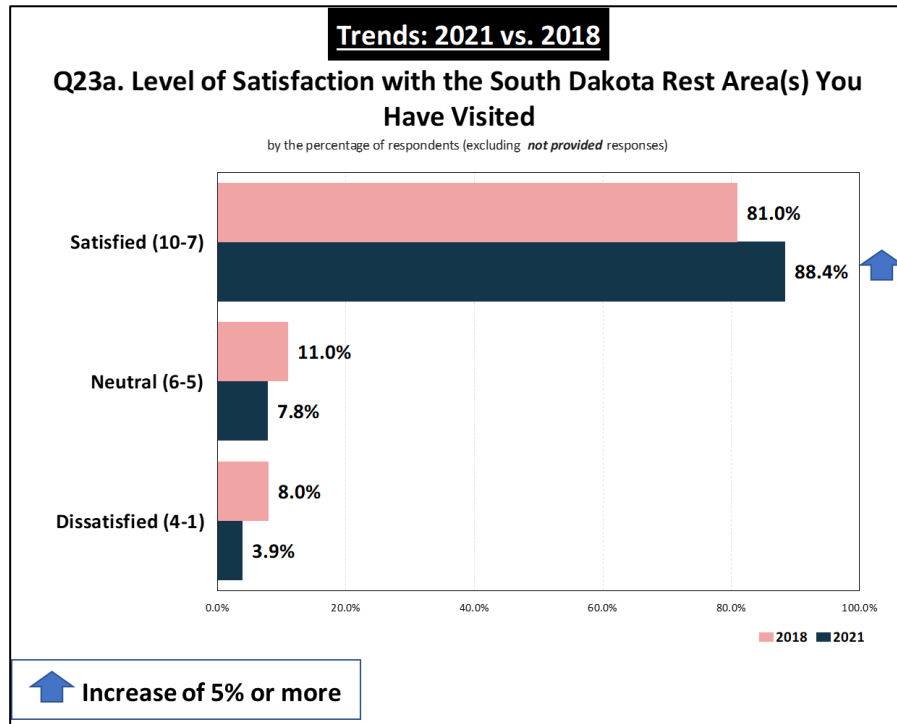


Figure 17: Satisfaction with Rest Areas

Perceptions of Roundabouts

- Sixty-three percent (63.1%) of residents were satisfied with the roundabouts they have experienced.

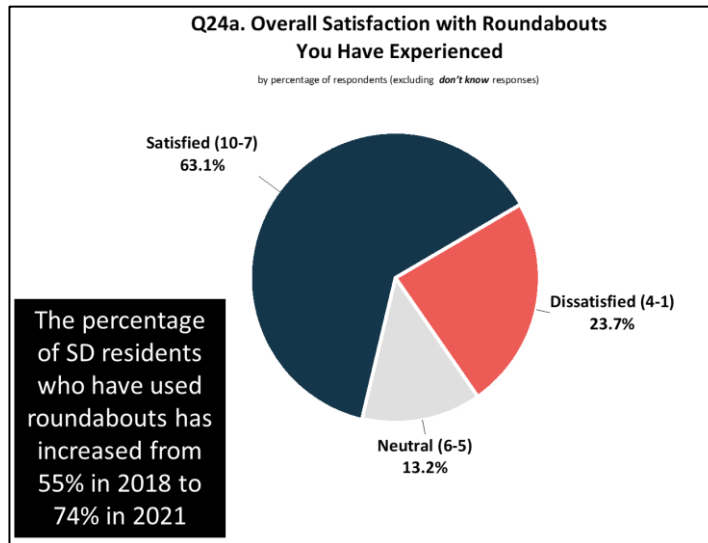


Figure 18: Satisfaction with Roundabouts Used

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 (75.8%)
- Making safety improvements to highways (50.4%)
- Expanding transportation services for seniors and persons with disabilities (36.5%)
- Adding capacity to highways to reduce congestion (32.7%)

Accommodating the use of electric vehicles and electric vehicle charging stations was the 6th highest priority. Residents were more likely to pick accommodations for electric vehicles than new highways that provide more direct links between communities.

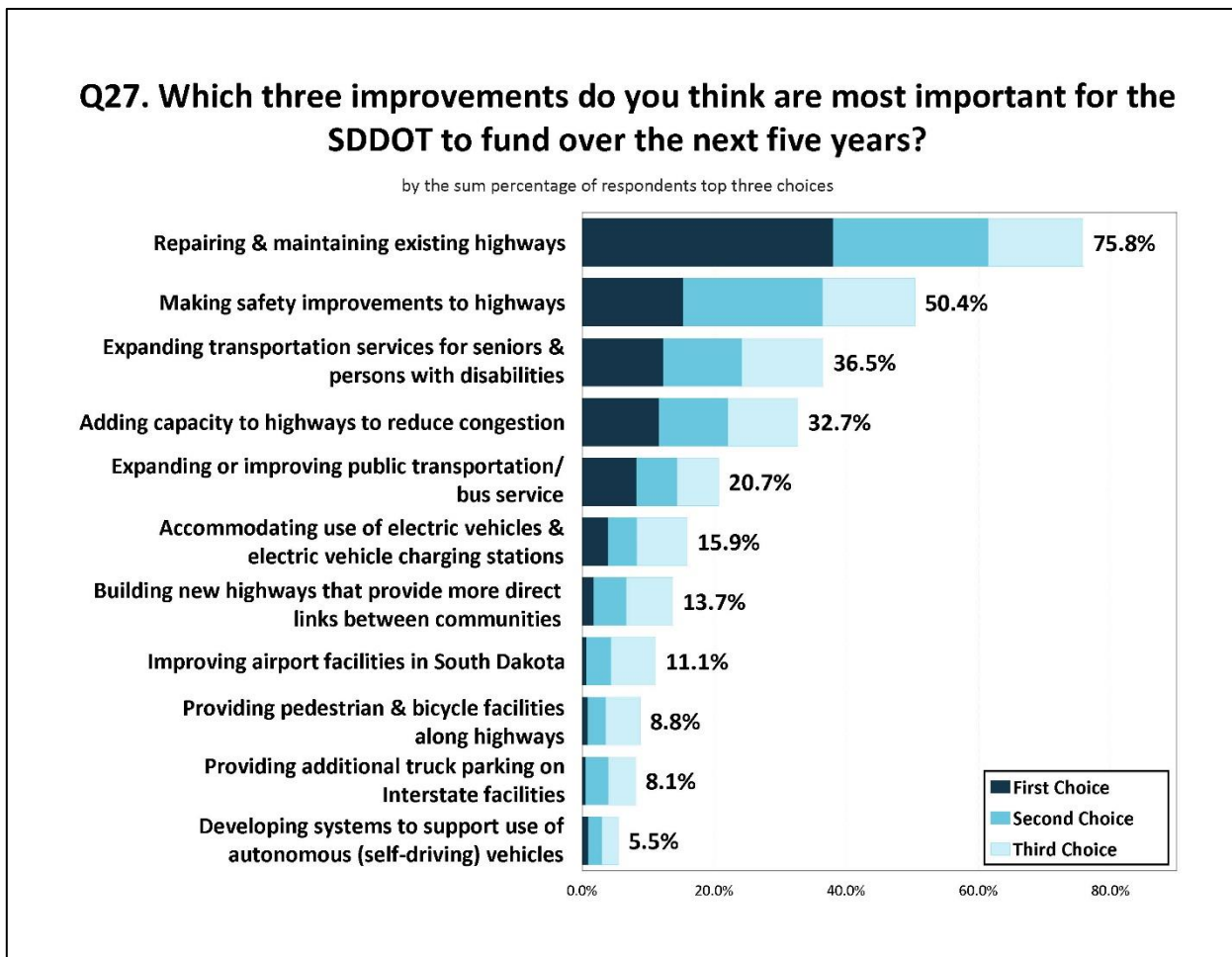


Figure 19: Transportation Priorities that Should Receive the Most Emphasis

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, 38% of residents think the current quality of SDDOT services are “better,” 51.6% think they are “about the same,” 2.7% think they are “worse,” and 8.1% did not have an opinion.
- Twenty-one percent (20.9%) of residents rated the value of services provided by SDDOT as “excellent,” 54.8% gave the value a “good” rating, 17.7% gave the value an “OK” rating, 2.0% gave the value a “low” rating, and 4.6% did not have an opinion.
- Overall satisfaction with SDDOT increased significantly from 73.0% in 2018 to 80.5% in 2021 as shown in the figure below.

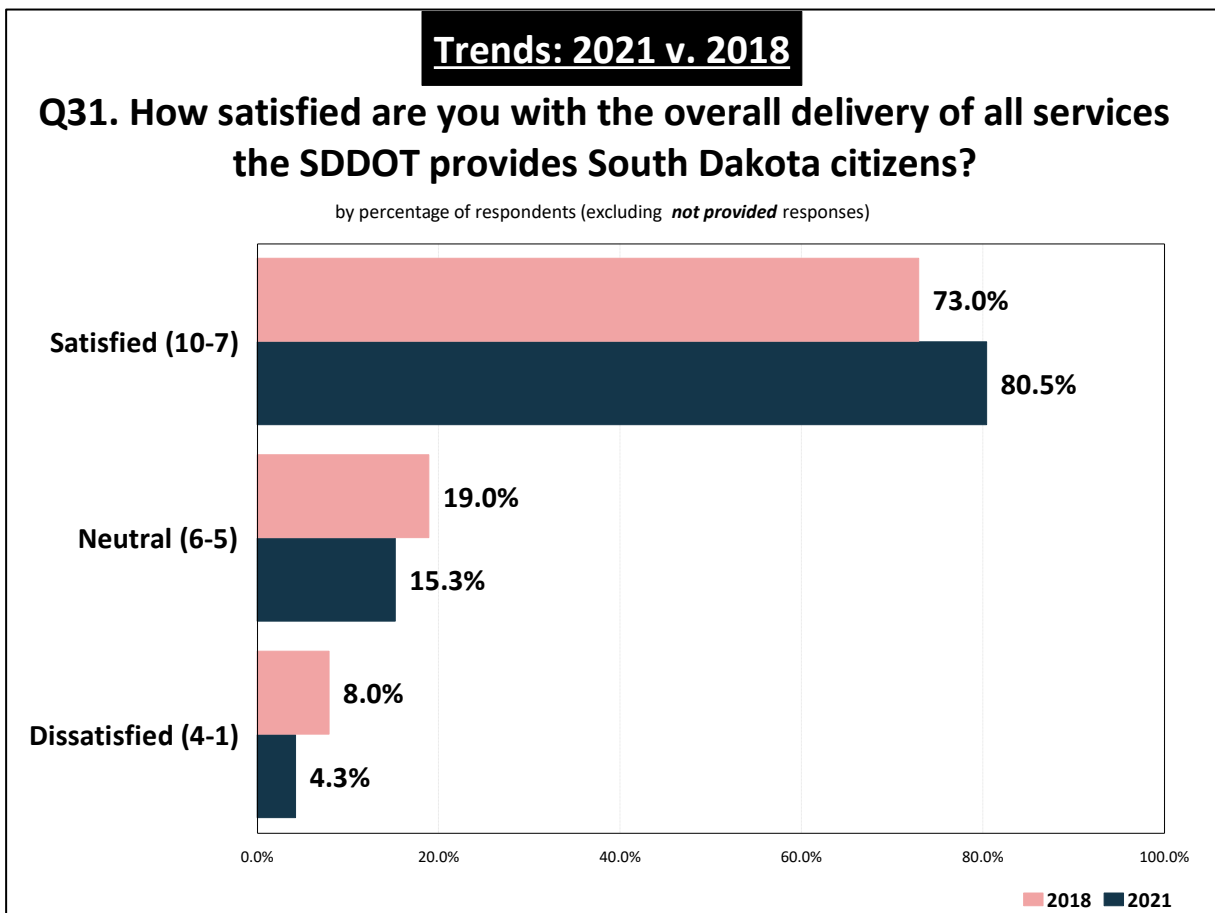


Figure 20: Overall Satisfaction with SDDOT

Customer Engagement Ratings

- Seventy percent (70%) of residents agreed with the statements that “SDDOT has employees who really care about the public” and that “SDDOT treats people with respect.” This was 10 times the number of people who did not agree with each statement (7% each).
- 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”.
- 61% of those surveyed think SDDOT is one of the best governmental organizations in South Dakota.
- The majority (58%) of residents think SDDOT sets the standard for designing and maintaining safe highways.

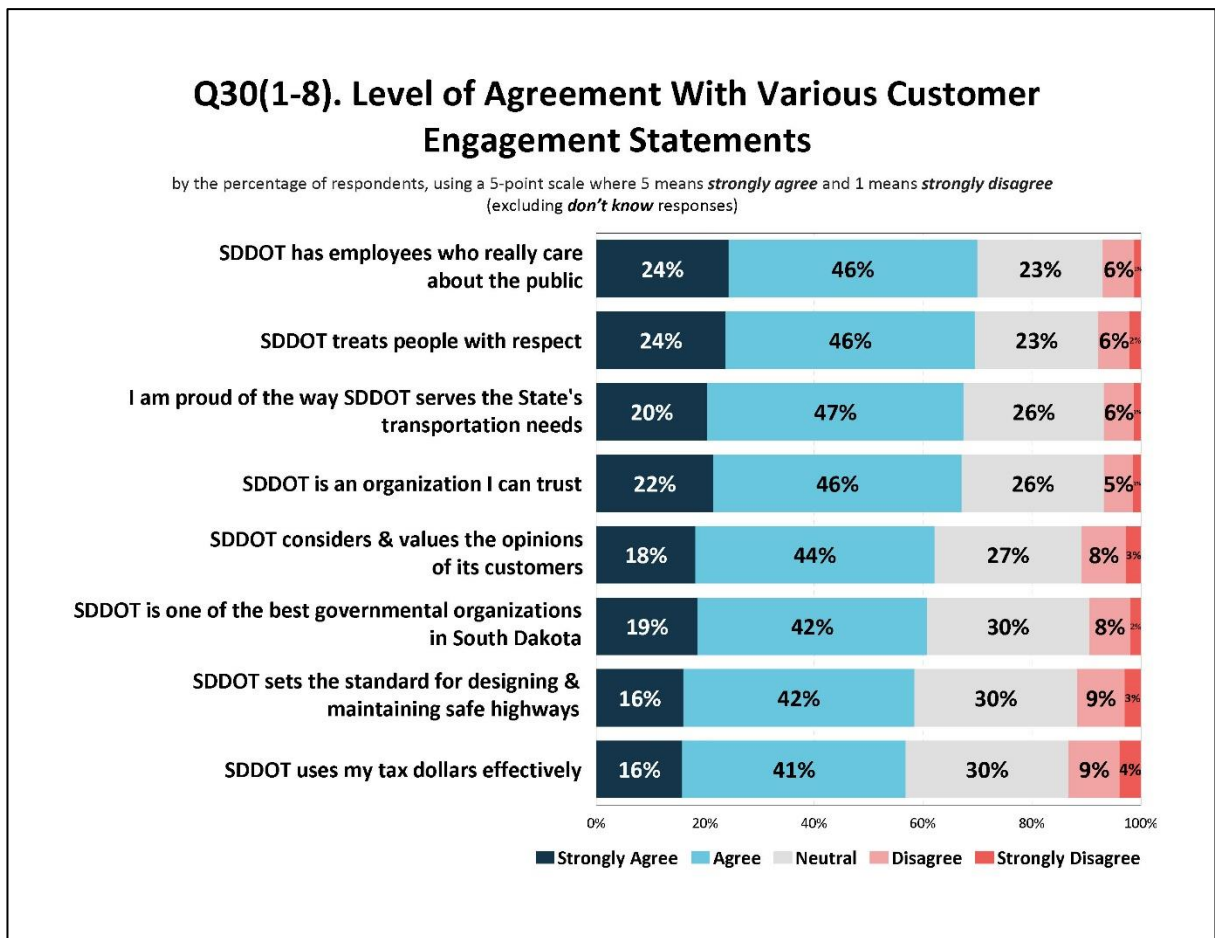


Figure 21: Customer Engagement-Related Ratings

4.0 CONCLUSIONS

The following conclusions were made based upon the results of the 2021 Statewide Customer Satisfaction Survey. The supporting evidence accompanies each conclusion.

4.1 SDDOT Is Setting the Standard for 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, Colorado, Nebraska, Minnesota, Iowa, and Kansas. The survey questions were identical to the questions asked to South Dakota residents and the timing of the survey was the same (November-December 2021). Among the 43 performance-related questions on the benchmarking survey, SDDOT outperformed the average for the North Central Region in all 43 areas. In fact, SDDOT's ratings were at least 10% higher than the North Central Region in 38 of 43 areas. The areas for which the results for SDDOT were 20% or more above the North Central Region are provided in the table below.

| Item Rated 20% or More Above the North Central U.S. Average | % SDDOT vs. North Central Average |
|---|-----------------------------------|
| Satisfaction with the overall value of the services provided by their State DOT | 35% |
| Satisfaction w/the Feeling of Safety on State, U.S., and Interstate Highways | 28% |
| Overall Satisfaction with 2-lane undivided Highways in the State | 27% |
| Satisfaction with the condition of guardrails on undivided highways | 25% |
| Satisfaction with snow/ice removal on undivided highways | 24% |
| % of Residents who think their state DOT is one of the best governmental organizations in their state | 23% |
| Overall Satisfaction with Interstate and Rural Divided Highways | 23% |
| Satisfaction with the width & condition of shoulders on Interstates | 23% |
| Satisfaction with the condition of guardrails on Interstates | 22% |
| Satisfaction with the overall flow of traffic on Interstates | 22% |
| % of Residents Who Think Their State DOT uses their tax dollars effectively | 22% |
| Satisfaction with roadside care on undivided highways | 20% |

Figure 22: SDDOT Satisfaction Ratings Compared to the Regional Average

4.2 SDDOT Is Providing High Levels of Customer Service

Supporting Evidence

Seventy-three percent (73%) of the residents surveyed who had contacted SDDOT during the past year indicated they were either "very satisfied" (40%) or "satisfied" (33%) with the customer services provided by the SDDOT employee who helped them most recently. Only 15% of residents indicated they were "dissatisfied" or "very dissatisfied."

4.3 Overall Satisfaction with Contractors Has Improved

Supporting Evidence

- The percentage of contractors who rated the value of services provided by SDDOT as “good” or “ok” increased from 76% in 2018 to 83% in 2021. Only 4% of contractors thought SDDOT provided “poor” value. The remaining 13% did not have an opinion.
- Eighty-nine percent (89%) 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 57.0% in 2018 to 65.3% in 2021. Among 19 specific areas that were assessed, satisfaction increased in 14 of the 19 areas.

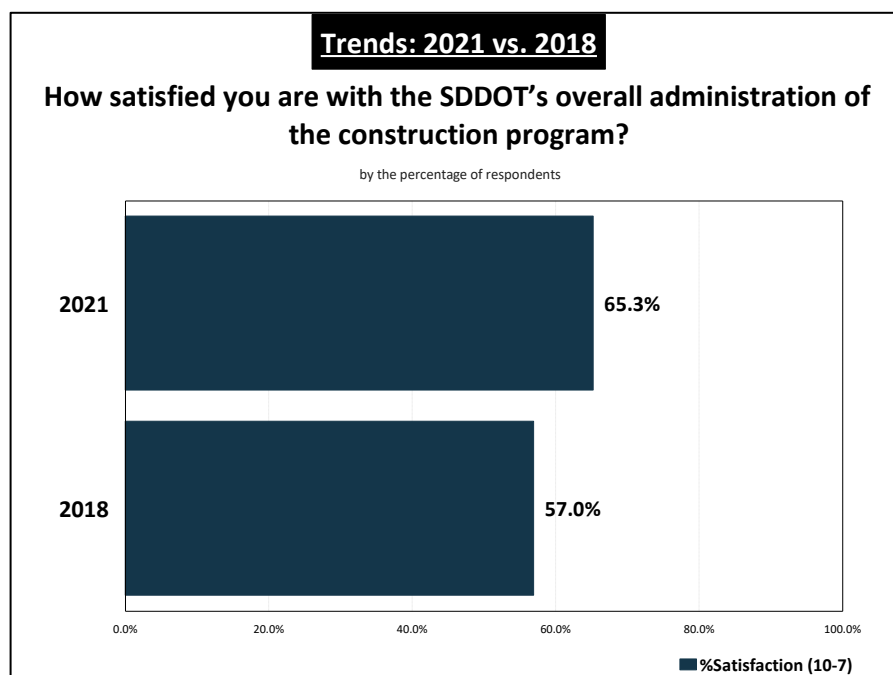


Figure 23: Trend Analysis of Respondent’s Satisfaction with SDDOT’s Construction Program

Areas that improved by more than 5% Since 2018

- SDDOT provides flexibility in timing and sequencing of work (+15.6%)
- SDDOT has timely finals on projects (+12.6%)
- SDDOT provides sufficient opportunity for contractors to provide input on projects prior to letting (+12.3%)
- SDDOT’s DBE solicitation process is convenient and efficient to use (+12%)
- SDDOT provides opportunity for contractors to suggest alternative approaches during construction (+11.5%)

- The amount of paperwork required by SDDOT is reasonable (+7.9%)
- SDDOT produces construction plan sets that are clear, accurate, and complete (+6.7%)
- SDDOT responds promptly to requests for decisions and information (+5.5%)
- SDDOT seems to do a good job of developing employees for senior positions (+5.2%)

Areas that declined by more than 5% Since 2018

- SDDOT inspectors with whom I have worked are adequately trained (-10.9%)
- SDDOT does a good job enforcing traffic control requirements and ensuring a safe environment for the public, SDDOT staff, and contractors (-9.3%)
- SDDOT pays contractors promptly (-8.3%)
- SDDOT treats me/my organization fairly (-5.8%)

4.4 SDDOT’s Efforts to Improve Communication Are Definitely Working

Supporting Evidence

- Satisfaction with SDDOT’s effort to keep residents informed about road conditions has increased 35.8% since 2018.
- Satisfaction with SDDOT’s efforts to alert residents about delays and alternative routes caused by construction projects has increased 12.3% since 2018.
- Overall satisfaction with SDDOT’s efforts to keep the public informed increased by 6% since 2018.
- The percentage of residents who report using SDDOT’s website increased from 29% in 2018 to 44% in 2021.

4.5 Overall Satisfaction with the State Highway System Has Increased Significantly

Supporting Evidence

- Overall satisfaction with Interstate and divided highways increased 10% since 2018, and satisfaction improved for 12 of the 13 specific attributes of Interstate and Divided highways that were assessed.
- Overall satisfaction with two-lane/undivided highways increased 12% since 2018, and satisfaction improved in all 13 of the specific attributes of two-lane/undivided highways that were assessed.

4.6 Residents Feel Safer Driving on State Highways Than They Did in 2018

Supporting Evidence

- Overall satisfaction with the feeling of safety on highways increased 8.9% since 2018.

- Forty-seven percent (47%) of the residents surveyed indicated that South Dakota highways were “much safer” (11%) or “somewhat safer” (36%) than they were five years ago.
- Winter conditions and rough roads continue to be the top safety priorities for residents, but residents are more concerned about traffic congestion and construction zones than they were in 2018.

4.7 SDDOT Should Plan for Changes to Transportation Needs that are Being Caused by the Pandemic and Changes in Technology

- **More residents are likely to be working from home.** Nearly half (44.1%) of those surveyed who were employed indicated that they plan to work at home at least one day per week after the pandemic. This represents a 14.3% increase from the 29.8% who reported working at home at least one day per week before the pandemic. If 14.3% of South Dakota’s 470,000 persons in the labor force begin working at home, the State could see up to 67,000 more people working at home at least one day per week as a long-term impact of the pandemic.
- **The demand for infrastructure that supports electric vehicles and other emerging technologies is likely to increase significantly.** More than one in nine (11.2%) of all residents surveyed indicated that they plan to buy an electric vehicle in the next five years. The percentage was highest among young adults among whom 16.1% indicated they planned to purchase an electric vehicle in the next five years.

5.0 RECOMMENDATIONS FOR ACTION

In addition to the findings presented previously in this report, the research team conducted the importance-satisfaction analysis to identify priorities for the Department based on the results of the 2021 Statewide Customer Satisfaction Survey. The results of this analysis are provided below.

5.1 Interstate and Divided Highway Priorities

ETC Institute performed the Importance-Satisfaction (I-S) analysis to develop ratings to help prioritize the services and features that are of the highest importance to residents and to target resources toward those features and services where residents are least satisfied. The I-S rating is based on the concept that public agencies will maximize overall customer satisfaction by emphasizing improvements in those areas where the level of satisfaction is relatively low, and the perceived importance of the service is relatively high. The top priorities based on the I-S analysis should closely resemble those from the matrix above.

The table on the following page shows the I-S ratings for all 13 of the services and features of Interstates and divided highways that were rated on the 2021 Statewide Customer Satisfaction Survey. The following three features/services had the highest I-S ratings:

- Smoothness of surface of highways
- Condition of bridges
- Snow and ice removal during the winter

| Importance-Satisfaction Analysis & Ratings Interstate & Rural Divided Highway Features/Services 2021 SDDOT Customer Satisfaction Survey Resident Survey | | | | | | |
|--|------------------|---------------------|----------------|-------------------|--------------------------------|-----------------|
| Category of Service | Most Important % | Most Important Rank | Satisfaction % | Satisfaction Rank | Importance-Satisfaction Rating | I-S Rating Rank |
| Very High Priority (I-S > 0.2) | | | | | | |
| Smoothness of the surface of highways | 64.0% | 1 | 68.7% | 12 | 0.2003 | 1 |
| High Priority (I-S = 0.1-0.2) | | | | | | |
| Condition of bridges | 42.3% | 3 | 73.3% | 10 | 0.1129 | 2 |
| Snow & ice removal during the winter | 62.1% | 2 | 83.6% | 6 | 0.1018 | 3 |
| Medium Priority (I-S < 0.1) | | | | | | |
| Visibility of pavement markings | 34.2% | 5 | 73.0% | 11 | 0.0923 | 4 |
| Removal of roadway/shoulder debris | 34.9% | 4 | 80.9% | 8 | 0.0667 | 5 |
| Frequency of rest areas | 18.5% | 7 | 65.4% | 13 | 0.0640 | 6 |
| Width & condition of shoulders | 25.2% | 6 | 79.4% | 9 | 0.0519 | 7 |
| Lighting & visibility at interchanges | 16.2% | 9 | 81.2% | 7 | 0.0305 | 8 |
| Roadside care | 17.4% | 8 | 89.4% | 2 | 0.0184 | 9 |
| Overall flow of traffic | 14.2% | 10 | 87.6% | 5 | 0.0176 | 10 |
| Drainage from the surface of highways | 13.4% | 11 | 87.7% | 4 | 0.0165 | 11 |
| Directional, regulatory, & informational signage | 12.3% | 12 | 88.1% | 3 | 0.0146 | 12 |
| Condition of guardrails | 7.7% | 13 | 93.3% | 1 | 0.0052 | 13 |

Figure 24: Interstate and Divided Highway Services and Features I-S Ratings

5.2 Two-Lane and Undivided Highway Priorities

The table below shows the I-S ratings for all 13 of the services and features of two-lane and undivided highway features/services that were rated on the 2021 Statewide Customer Satisfaction Survey. The following five features/services had the highest I-S ratings:

- Smoothness of surface of highways
- Snow and ice removal during winter
- Width and condition of shoulders
- Condition of bridges
- Visibility of pavement markings

| Importance-Satisfaction Analysis & Ratings State & U.S. Two-Lane and Undivided Highway Features/Services 2021 SDDOT Customer Satisfaction Survey Resident Survey | | | | | | |
|---|------------------|---------------------|----------------|-------------------|--------------------------------|-----------------|
| Category of Service | Most Important % | Most Important Rank | Satisfaction % | Satisfaction Rank | Importance-Satisfaction Rating | I-S Rating Rank |
| Very High Priority (I-S > 0.2) | | | | | | |
| Smoothness of surface of highways | 62.5% | 1 | 56.6% | 12 | 0.2713 | 1 |
| High Priority (I-S = 0.1-0.2) | | | | | | |
| Snow & ice removal during winter | 62.1% | 2 | 73.3% | 5 | 0.1658 | 2 |
| Width & condition of shoulders | 35.9% | 4 | 58.4% | 11 | 0.1493 | 3 |
| Condition of bridges | 37.5% | 3 | 63.1% | 9 | 0.1384 | 4 |
| Visibility of pavement markings | 33.8% | 5 | 61.5% | 10 | 0.1301 | 5 |
| Medium Priority (I-S < 0.1) | | | | | | |
| Removal of roadway/shoulder debris | 32.1% | 6 | 73.0% | 6 | 0.0867 | 6 |
| Frequency of rest areas | 15.9% | 9 | 48.0% | 13 | 0.0827 | 7 |
| Lighting & visibility at interchanges | 16.4% | 8 | 63.4% | 8 | 0.0600 | 8 |
| Drainage from surface of highways | 14.2% | 10 | 73.0% | 7 | 0.0383 | 9 |
| Roadside care | 19.5% | 7 | 81.0% | 2 | 0.0371 | 10 |
| Overall flow of traffic | 11.0% | 11 | 79.9% | 3 | 0.0221 | 11 |
| Directional, regulatory, & informational signage | 8.6% | 12 | 78.7% | 4 | 0.0183 | 12 |
| Condition of guardrails | 7.8% | 13 | 85.6% | 1 | 0.0112 | 13 |

Figure 25: State and U.S. Two-Lane and Undivided Highway Features/Services I-S Ratings

5.3 Emphasize Maintenance and Preservation

SDDOT should emphasize the maintenance and preservation of the existing highway system because “repairing and maintaining highways” was clearly the top priority for residents on the 2021 survey. Specific actions that should be considered in support of this recommendation include:

- Educating the public about the amount of resurfacing that has taken place on state highways over the past two years
- Informing the public about the timeline to complete highway construction projects to ensure the public has accurate expectations as they relate to the time it takes to complete construction projects
- Informing the public and key customer groups about how SDDOT is planning to maintain and preserve the state highway system in future years
- Ensuring that projects that support the preservation of the existing system are given a high priority in the Statewide Transportation Improvement Program
- Continuing to emphasize the importance of maintaining the surface of state highways to all SDDOT employees so the organization will continue to be responsive to customer expectations in this area

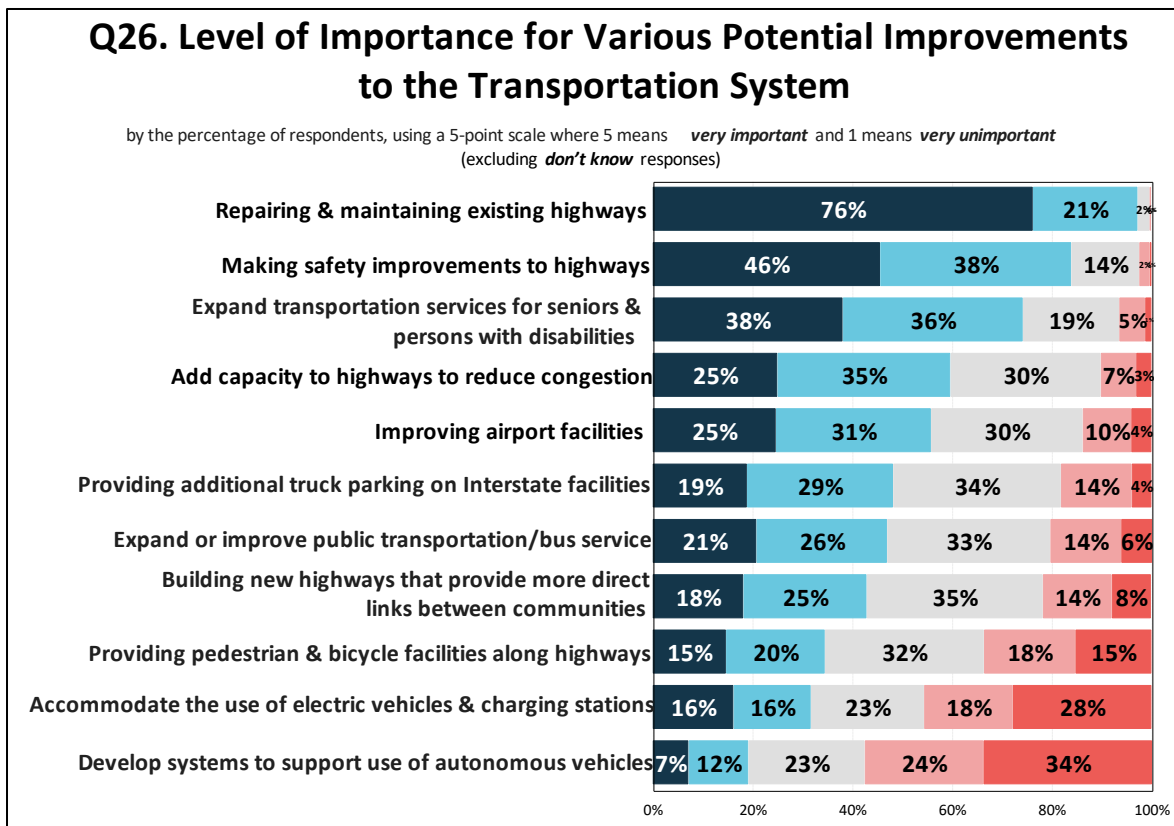


Figure 26: Importance of Potential Improvements to the Transportation System

5.4 Continue to Emphasize Safety

SDDOT should continue to emphasize operational investments and activities that support travel safety on state highways in South Dakota. Specific operational activities that should be considered included the following:

- In addition to addressing winter conditions, which showed a significant increase among residents when asked what they thought were the biggest safety problems, the Department should also explore ways to cut down on distracted driving, which is the item residents indicated was the biggest safety problem on highways in South Dakota.
- When addressing safety on highways during winter conditions, 67% of residents indicated they would favor temporarily lowering speed conditions to match road conditions. The Department should explore ways to implement lowered speed limits that match road conditions on highways throughout the state.

5.5 Continue to Improve Communication About Road Conditions

SDDOT has made significant progress in its efforts to communicate about road conditions, but the gains have been short-term. Expectations for information about road conditions is likely to rise in the years ahead, so SDDOT will need to continue to find new ways to inform residents about road conditions. Specific operational activities that should be considered included the following:

- The Department should explore additional methods of relaying important road condition information to residents on social media, its website, and other sources.
- SDDOT should continue emphasizing road condition information on SDDOT message boards along highways and SDDOT's website.

5.6 Continue to Improve Interactions with Contractors

SDDOT should continue to improve the way it works with contractors. The actions that will have the most positive impact improving SDDOT's partnership with employees are listed below. These items are the top five priorities for respondents to the contractor survey. (This bulleted list does include complete sentences.)

- SDDOT should continue to find ways to empower employees to make decisions.
- SDDOT should ensure its employees respond promptly to requests from contractors for decisions and information.
- SDDOT should continue to find opportunities for contractors to provide input prior to letting.
- SDDOT should continually review the time requirements to complete projects to ensure they are reasonable.
- SDDOT should ensure employees are equipped to promptly explain reasons for decisions.

5.7 Recommendations for Action

The recommendations described above should be implemented in three steps as described below.

Step 1: SDDOT Should Market the Results of the Survey to Customers

- During the summer of 2022, SDDOT should consider issuing press releases to the media and informational notices to leaders of key customer groups to report the findings of the 2021 Customer Satisfaction Assessment and announce the Department's plans to respond to the findings.

Step 2: SDDOT Should Establish Awareness and Accountability within SDDOT

- During the summer and fall of 2022, the Executive Team should provide training to key staff on how to use the "dashboards" that were developed for the project. The dashboards give key staff access to the survey data in a wide range of formats to support decision-making.
- During the fall of 2022, the Executive Team should consider having subordinate managers from the Area Engineer level and above identify specific ways that they will use the results of the 2021 Customer Satisfaction Assessment to improve organizational performance over the next two years.
- During the spring of 2023, SDDOT should consider having managers from the Area Engineer level and above provide an update to their immediate supervisor regarding how they have used the results of the 2021 Customer Satisfaction Assessment to improve their work unit's performance as part of their performance review process.

Step 3: SDDOT Should Use the Results to Update the Department's Strategic Plan and Other Initiatives Related to Promoting Excellence in the Organization

- The 2021 survey contains a wide range of data that can be used as performance measures for the Department's Strategic Plan and other initiatives designed to promoting excellence in the organization. By the fall of 2022, the Executive Team should ensure that those leading the Department's strategic planning efforts are very familiar with the results of the 2021 survey.

Step 4: SDDOT Should Initiate Another Assessment

- During 2023, SDDOT should initiate the necessary actions to conduct another Customer Satisfaction Assessment in 2023 or 2024.

6.0 SUMMARY AND BENEFITS

Although the short-term benefits of customer surveys are difficult to measure, the long-term impact of such processes can have a dramatic and lasting impact on an organization. The results of the 2021 Customer Satisfaction Assessment clearly demonstrate that SDDOT's ongoing efforts to gather input from customers has had a positive impact on public perceptions of the Department. The Department's priorities are generally aligned with the needs of its customers, and overall satisfaction ratings with Interstates, divided highways, two-lane highways, and undivided highways is extremely high.

By conducting surveys every few years, SDDOT has been able to provide its senior managers and employees with objective feedback from residents and the key customer groups on a regular basis. This has created a corporate culture that is customer-oriented, which has helped the Department meet the needs of its customers.

Although the customer satisfaction survey should not be the only tool the Department uses, it remains a very important tool to balance feedback that would otherwise only be provided by special interest groups or those who have a direct stake in the outcome of major transportation planning and investment decisions. The Customer Satisfaction Assessment ensures the needs of the general public, and key customers who do not interact with the SDDOT on a regular basis, are incorporated into the Department's decision-making process.

Despite progress in some areas, the Department still has room for improvement. To continue achieving success, SDDOT should respond to the results of this survey and be prepared to address new issues that will emerge in the years ahead. If resources are available, SDDOT should administer the survey again in two or three years. The overall assessment process engages community leaders, the general public, and key customer groups in a manner that demonstrates the Department's commitment to customer satisfaction. Because the 2021 survey differed slightly from previous surveys, SDDOT would benefit from additional surveys that gauge the way leaders at the Department respond to the results of the survey. Objectively evaluating the Department's performance over time gives SDDOT leadership the ability to grade themselves on the actions they took and to course-correct if necessary. This process will also help build long-term customer loyalty, which will provide immeasurable benefits to the Department in the years ahead.