

Appendix D

Customer Survey Summary

October 2003

Background

Department of Transportation, district 3, is supporting the regional (region 7W) planning effort. Region 7W is in the process of developing a long-range plan for the area and capturing the residents' opinions and preferences. The data collected from this survey will be incorporated into the regional planning process.

Methodology

In July 2003, surveys were mailed to 1,500 households in four counties: Sherburne, Stearns, Benton and Wright. A county proportionate sample was purchased; meaning the households randomly selected were reflective on the number of households in each of the participating counties. Randomly selected households received a cover letter requesting their participation, a one page back-to-back survey and a return, prepaid envelope. Residents were given up to three weeks to complete and return their survey. A total of 520 surveys were returned by mid-July, representing a 35% return rate (a good return rate for a mail study). Of those, 400 surveys were useable and tabulated. A base of n=400 represents a reliability factor of +/- 4.9% at the 95% confidence level (smaller bases result in higher margins of error).

Survey Questions and Analysis

The types of questions include:

- Transportation modes used
- Commuting behavior
- Anticipated travel behavior changes, next 15 years
- Preferences for transportation funding
- Transportation-related concerns, and
- Preferred methods of communication (about future long term plans).

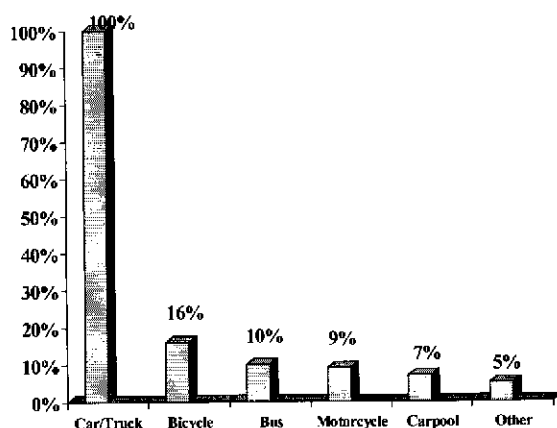
Following is a summary of results reported in total, and by subgroup (where differences are noteworthy). Subgroups considered during analysis included differences in opinion filtered by the following characteristics: respondent's age, gender, and size of community (St. Cloud metro vs. non-St. Cloud metro residents).

Detailed Findings

Transportation Mode

Not surprisingly, everyone has traveled by car or truck in the past year -- clearly the primary mode of transportation. Additionally, sixteen percent have also traveled by bicycle, 10% by bus, 9% by motorcycle and 7% via a car or vanpool. In the 'other category' of travel, a few wrote into the survey the following modes: walk, horse, taxi and private plane.

Which forms of transportation have you used while traveling within Minnesota this past year?



[N=400] Exceeds 100% due to multiple responses

The mode of transportation used most often is car/truck (97%) followed by a distant two percent for bus. The remaining one percent includes carpool, walking and motorcycle.

Which form of transportation do you use, most often?



[N=400]

Those traveling by bus were primarily in the category of 45-54 year olds, and all were commuters.

Commuting Behavior

Among those surveyed, seven in ten (70%) are currently traveling to work or school on a regular basis. Of this commuting population, ninety seven percent (97%) fall between the ages of 25 and 64 years. Two thirds (67%) of this commuting population are traveling to work or school between the hours of 5 and 9 a.m. and/or 2 and 6:30 p.m. This pattern is the same for those residing within the St. Cloud metro area and those residing outside the St. Cloud metro area.

Commuting Behaviors

Do you currently travel to work or school on a regular basis?

Yes	70%
No	28%
No answer	2%

Do you regularly commute in the mornings between 5 and 9 a.m. and/or in the afternoons between the hours of 2 and 6:30 p.m. (Among Commuters)

Yes	67%
No	6%

Anticipated Travel Behavior Changes

Commuters were asked to think about how their driving behavior may change over the next 15 years. A list of possible travel behavior-related changes was offered. Respondents were asked to separate their most likely behavior change with all other behaviors changes under consideration. The majority of commuters plan minor adjustments to deal with the growing traffic over the next 15 years; such as leaving earlier or later for work (30%) and avoiding certain roadways when too congested (21%). These same patterns also exist for their non-primary behavior changes such as: just sit and wait longer in traffic (15%). Also, among this list of non-primary behavior adjustments we begin to see more lifestyle-type changes such as: purchasing a vehicle – for gas saving purposes (10%), using rail - if available (9%), occasionally share rides/carpooling (9%) and telecommuting (8%).

Thinking of the growth in the area traffic, how might this increased traffic affect/change the way you drive within the next 15 years?

<u>Behavior</u>	<u>Most Likely/Primary Change</u>	<u>Others Changes*</u>
Leave earlier/later for work	30%	16%
Avoid certain roadways/too congested	21%	23%
Just sit/wait longer in traffic	4%	15%
Occasionally work from home/telecom.	3%	8%
Use rail (if available)	3%	9%
Move closer to work	3%	5%
Occasionally share rides/carpool	2%	9%
Purchase vehicle – for gas savings	1%	10%
Use public transit more often	1%	5%
No Answers	32%	--

[n=270] *Based to total responses, commuters only.

Preferences for Transportation Funding

Respondents were asked to assume they were 'the' person responsible for long-term transportation planning in the region. Seven expenditure categories were offered and their first and second spending preferences were recorded. Consistent with the data from the statewide planning research, region 7W residents also seek a spending emphasis in maintaining current roadways with nearly half (49%) selecting this as their first priority and an additional quarter (24%) selecting as their second spending priority. Resulting in three out of four expressing maintaining current roadways is their spending priority. Constructing new roadways was mentioned next most often with a collective response of nearly six in ten (57%). Transit-related priorities came in a distant third; with new transit options funding yielding a third of the votes and increasing bus transit yielding 12% of the votes.

Last Choice for Transportation Funding

Far and away, the last choice for transportation funding is toll roads, with more than four in ten (45%) citing this as the last choice for spending transportation dollars. This is followed by concerns with investments in multi-modal spending (new and increased bus transit and ped/bike trails).

There are significant gender differences when analyzing the last choice response as it relates to toll roads. Namely, a significantly larger number of females listed this in their last spending choice, compared to males (57% vs. 44%, respectively).

Next, assume you are THE person responsible for long-term transportation planning in the region, and it is your job to set the transportation priorities for the next 15 years. In which of the following categories would you choose to place transportation money... (first, second and last choice)?

Investment Options	1 st	2 nd	Last Choice
Maintaining current roadways	49%	24%	2%
Constructing new roadways	28%	29%	6%
New transit options	15%	18%	19%
Increasing bus transit	2%	10%	8%
Maintaining bus transit	1%	4%	1%
Ped/Bike trails	1%	2%	14%
Toll roads	1%	7%	45%
No answer/others	3%	6%	5%

[n=400] *Based to total responses

Transportation-related Concerns (chart on next page)

Residents were asked to identify their top three transportation-related concerns. A list of 14 possible topics was provided along with space to write in any additional concerns they may have. There's clearly a broad-range of concern spreading from congestion to safety to the region's population growth.

The traffic growth in the region is the largest transportation concern, with a third (31%) citing congestion as the number one issue. When looking at the three concerns collectively (first, second and third concerns) nearly one in six (57%) checked the topic of congestion. There appears to be a recognized connection between congestion and population growth, with this population issues mentioned second most often; with a collective mention (39%). The concern expressed third most often is safety-related; with road rage (other drivers) representing 35% of the response and road safety (in general) garnering 29%.

Notably, there was no significant difference between the level of concern for congestion when comparing responses among those residing in and outside the St. Cloud metropolitan area. Similarly, there were no differences in the concern over population growth when comparing the two populations based on area of residence.

Next, please identify your TOP THREE transportation-related concerns.

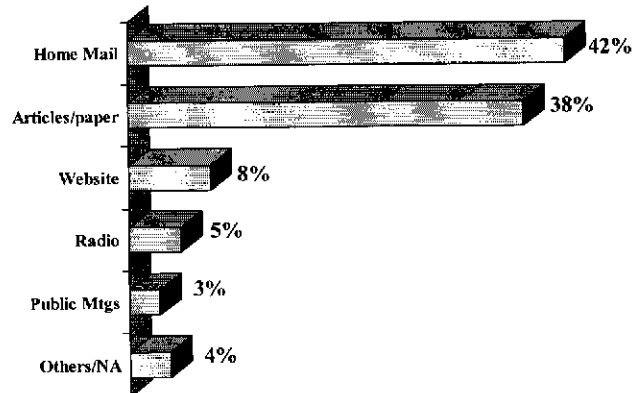
Considerations	Largest Concern	Second	Third
Congestion	31%	17%	9%
Population growth in region	13%	13%	13%
Road rage/other drivers	11%	14%	10%
Road safety (in general)	9%	9%	11%
Speed limits	7%	7%	7%
Adequate transp. Planning	7%	8%	13%
Adequate funding	6%	7%	9%
Interchanges/intersections	6%	6%	6%
Adequate public transit	4%	7%	7%
School zone safety	3%	3%	2%
Adequate river crossings	2%	2%	3%
Availability of travel info.	--	2%	2%
RR-Xings	--	3%	1%
Limited access	--	1%	2%
Others/NA	1%	1%	5%

[n=400] *Based to total responses

Preferred Methods of Communication

As long-term plans develop in the region, area residents prefer to learn of this information via direct mail to their home, or via the local newspaper (42% and 38%, respectively).

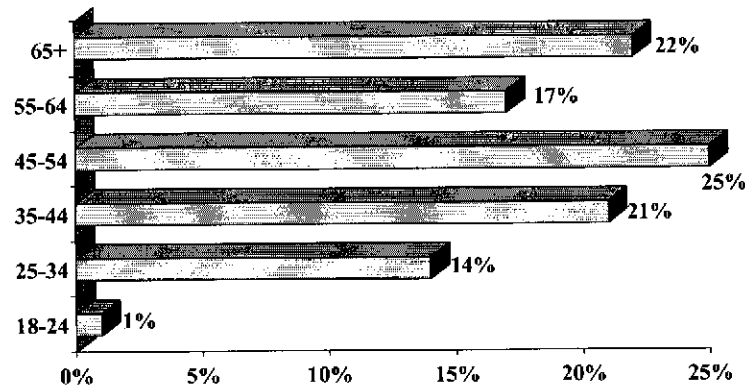
How would you most like to get information about the region's long-term plans?



[N=400]

Demographics of participants responding in this survey are shown below:

Respondent Age



[N=400]

Gender & Geographic Area

Gender:

Male	64%
Female	34%
No answer	2%

*Do you live in a city of more than 5,000 people?

Yes	56%
No	43%
No answer	1%

Do you live in the St. Cloud metropolitan area?

Yes	36%
No	61%
No answer	3%

*Notably, a significant number of respondents cited 'no' to the question do you live in a city of more than 5,000 people, and then also answered 'yes' to whether they live in the St. Cloud metro area.