INDOT Market Research Study

Summary of March 5, 2003 Focus Groups

technical
memorandum

prepared for
Indiana Department of Transportation

prepared by
Cambridge Systematics, Inc.
The Blackstone Group

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May 6, 2003

Steven C. Smith, AICP
Manager, Long-Range Transportation Planning Section
Indiana Department of Transportation (INDOT)
N901 100 North Senate Avenue
Indianapolis, IN 46204-2219

Re: INDOT Market Research Project
        Summary of March 5, 2003 Focus Groups

Dear Mr. Smith:

Cambridge Systematics, Inc. is pleased to provide this technical memorandum that summarizes the results of two focus groups held on March 5, 2003. The focus groups were facilitated, and this technical memorandum was drafted by Kathi Rose of The Blackstone Group.

The focus groups provide some valuable insights into the attitudes of some of INDOT's customers in the Indianapolis metropolitan area. However, the findings are not statistically significant. The focus groups were undertaken to assist Cambridge Systematics develop a general survey which will have statistically significant findings.

Please let us know if you have any questions on this material

Sincerely,

CAMBRIDGE SYSTEMATICS, INC.

Jeffrey N. Buxbaum, AICP
Senior Associate

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Objectives

- **To identify opportunities to improve the questionnaire for the large-scale telephone survey scheduled for May, 2003**

- **To gain insights into INDOT's customers' view of the nine policy areas in "Transportation in Indiana," INDOT's 1995 policy plan**

- **To explore customer attitudes towards INDOT and priorities related to transportation in Indiana**

Approach

- **Two consumer focus groups held in Indianapolis on March 5, 2003**

- **Participant profile**

  - **Registered voters from the Indianapolis metropolitan area, ages 19 to 70, at least a high school education, aware of INDOT**

  - **Group 1 (N = 10)**

    - Younger, more urban, more transit-oriented (four had ridden IndyGo buses in the past 30 days)

  - **Group 2 (N = 9)**

    - Older, more suburban, drivers with no recent transit use

Relationship of Focus Groups to Telephone Survey

- **Focus group participants are not a scientifically selected random sample, so the results can't be projected to all INDOT customers**

  - **The focus groups included Indianapolis-area residents only**

  - **The telephone survey will use random sampling to represent Indiana's residents overall**

- **Focus groups explore the opinions of a relatively few individuals to develop insights and ideas – not definitive conclusions. As such, the results of the focus groups can serve as a useful supplement to the general telephone survey**

- **The numbers in this report are for general understanding and comparison – they are not statistically significant findings**

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Proposed Improvements to the Telephone Questionnaire

Proposed Improvements to Telephone Questionnaire

- **Fix specific wordings – clarify "finishing highway construction fast," split "quality of life" into two items, etc.**

- **Eliminate the paired trade-offs as they may yield usable results**

  - **In particular, the participants resisted the forced choice between "help rural areas keep their character" and "help rural areas develop economically"**

    - "There is a town outside of Albuquerque, New Mexico, where the interstate runs above the town, and it's the cleanest town I've ever seen. Everybody was happy. Everybody was making money. It can be done [without] interfer[ing] with the quality of life."

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Proposed Improvements to Telephone Questionnaire *(continued)*

- **Add measures of INDOT's actual and perceived performance**

  - **Recall of most recent highway experience – trip length, construction, accidents, congestion, etc.**

  - **Ratings of specific attributes – e.g., highway signage, cleanliness, toll collection, etc.**

  - **Perceptual and attitudinal statements – e.g., INDOT's leadership role, use of technology, role in sprawl, etc.**

  - **Overall performance measures in addition to satisfaction – level of trust, changing for the better, fairness, etc.**

Proposed Improvements to Telephone Questionnaire (continued)

- **Add items to pinpoint emergent issues**

    - **Implications of growth**

    - **Demographic trends – e.g., aging population, increasing numbers of Hispanic residents, etc.**

    - **New policy goals – homeland security, etc.**

- **Add one or two open-ended questions**

    - **"What are the transportation issues you feel most strongly about?"**

    - **"What improvements would you recommend?"**

    - **"What would you like to be able to do that you cannot do using the transportation services available in Indiana?"**

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How Do Customer Priorities Compare to the 1995 Policy Goals?

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INDOT's Policy Areas

1995 INDOT Policy Plan	Description for Focus Group
Transportation System Effectiveness	Expand transportation options and connect them into an efficient system
Transportation Safety	Reduce transportation accidents
Demographic Changes and Quality of Life	Improve recreational travel and make it easier for low income, elderly, and disabled persons to get around
Transportation Finance	Obtain more funding for transportation
Intergovernmental Coordination	Improve transportation planning
Economic Development	Support economic development in Indiana
Natural Environment and Energy	Develop the transportation system in a way that protects the environment
Bicycle and Pedestrian Facilities	Make it easier for pedestrians and bicyclists to get around
New Technology	Use new transportation technologies

Policy Priorities

- **In a collaborative exercise, the participants allocated, on average, about half of their budget of 100 "dollars" to two of INDOT's nine policy goals**

    - **Improving transportation planning – $26**

    - **Expanding transportation options and connecting them into an efficient system – $23**

- **Two of the 1995 goals appeared to rank as second-tier priorities**

    - **Using new transportation technologies – $12**

    - **Working with government officials to get more funding for transportation – $9**

Policy Priorities *(continued)*

- **Four goals received relatively low priority**

  - **Supporting economic development in Indiana – $7**

  - **Developing the transportation system in ways that protect the environment – $7**

  - **Making it easier for pedestrians and bicyclists to get around – $6**

  - **Reducing transportation accidents – $5**

- **Combining two seemingly unrelated ideas, "raising quality of life by improving recreational travel and by making travel easier for low income, elderly, and disabled" caused difficulties and scored differently on paper ($14) than in the group exercise ($4)**

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Policy Priorities (continued)

- **On their own, the participants did not propose to add to the 1995 policy goals**

  - **Asked specifically about homeland security, Group 2 judged it as outside INDOT's sphere of responsibility**

Commentary on Customer Views of Policy Areas

- **Focus groups generally confirmed validity of INDOT's nine current policy areas**

- **Transforming INDOT's nine policy areas, each encompassing multiple technical elements, into unidimensional, easy-to-understand concepts is an important challenge in conducting customer oriented research**

- **Transportation planning ranked highest of the policy areas examined**

  - **Participants interpreted this very broadly, including**

    - The need for long-range planning horizons,

    - Process streamlining and timely project delivery, and

    - Taking responsibility for coordinating the transportation ramifications of planning, project implementation, and economic development activities undertaken by local, regional, and state agencies

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Commentary on Customer Views of Policy Areas (continued)

- **Viewing the "economic development" policy goal as a low priority is consistent with the findings of other consumer research that Cambridge Systematics has conducted – e.g., Vermont**

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Customer Attitudes Towards Transportation in Indiana

How Did the Participants View Transportation Services in Indiana?

- **The participants viewed Indiana as lagging behind elsewhere in the U.S. and Europe**

    - "Indianapolis is 30 years behind . . . Denver"

    - "Indianapolis is not really up to date on their road systems"

    - "Indiana [is notorious] for not keeping up or planning properly"

    - "They follow other states and see what other states do successfully and they try to replicate that"

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How Did the Participants View Transportation Services in Indiana? *(continued)*

- **In general, traffic congestion seems to have gotten a little worse in the past 12 months**

  - **Weighting participants' responses (from 1 = "got a lot worse" to 5 = "got a lot better") produced a mean rating of 2.2**

    - "There are just too many people."

    - "It's terrible. Traffic is congested . . . I think it's getting worse. All the cars and construction."

- **Specific aspects of the system have improved**

    - "The northwest side of 465 has had a lot of neon signs put up in the last two years . . . The signs have really helped bottlenecks. You can jump off."

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How Did the Participants View Transportation Services in Indiana? *(continued)*

- **Overall, though, the participants did not perceive Indiana as being proactive in addressing transportation needs**

    - "I do not think the city of Indianapolis has did [sic] very well at planning. I think they have had their head stuck in the cornfield."

    - "When they do build the homes, they don't build the roads to go with them."

    - "Instead of planning for future growth and putting two extra lanes in, they just add one to keep up or to catch up with . . . the amount of traffic growth that we have had . . . They do not seem to be proactive."

    - "Planning is supposed to be for tomorrow. We plan everything we do in Indiana for today."

What do Participants Think About INDOT?

■ **Participant awareness of INDOT came from multiple sources**

- • **TV, radio, and newspapers – general reports, major stories (e.g., I-69), public service announcements**

- • **Direct experience – work crew sightings, phone calls, work-related contact**

- • **Personal information seeking – in newspapers, on INDOT's web site**

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What do Participants Think About INDOT? *(continued)*

- **Though fuzzy about the full scope and details, the participants were broadly familiar with INDOT's responsibilities**

  - **Highway planning, construction, maintenance, repair**

  - **All aspects of transportation in Indiana**

  - **High-speed transit/public transit (cited by a few)**

  - **Truck licensing/freight permits (mentioned when aided)**

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What do Participants Think About INDOT? *(continued)*

- **In both groups many of the participants' top-of-mind associations with INDOT were less than favorable**

  - **Aggravation**

  - **Construction**

  - **Delays**

  - **Failure to perform road maintenance**

  - **Financially broke**

  - **Low productive work crews**

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What do Participants Think About INDOT? *(continued)*

- **Not all comments, though, were negative**
    - "Traffic on the interstate . . . is not congested going to work. It does not seem as backed up."

    - "They revamped the 465 and 74 interchange . . . It was so futuristic, it was like the Jetsons. I thought, 'This is really nice.'"

- **Direct questioning revealed that Group 2 largely viewed INDOT as trustworthy and fair**
    - "They are charged with such a huge responsibility that they have. I think they do a fairly good job."

    - "I am sure they do a lot of good things that happen every day that we do not give them credit for because it is not in the news."

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Perspective on the Views Expressed of INDOT and Transportation in Indiana

- **Customers' satisfaction with an organization is the result of both their *image* of it and their *direct experiences* with it**

- **INDOT's *image* is shaped by several factors**

  - **Government is not held in high esteem today**

  - **Negative media stories have more impact than positive ones**

  - **Participants did not clearly differentiate between local transportation agencies' responsibilities and INDOT's – partly from lack of knowledge, but also because they perceive INDOT, the state agency, as being "responsible for everything"**

    - This perception is not likely to change

Perspective on the Views Expressed of INDOT and Transportation in Indiana (continued)

- **Customers expect good performance, so they take many things for granted**

    - "Indiana has a beautiful highway system, in terms of being able to get from one city to another. It's perfectly laid out."

- **Direct questioning and statistical analyses are needed to distinguish between customers "normal expectations" for high quality services and specific improvements that will raise customer performance satisfaction**

- **Bottom line – INDOT can best develop an understanding of customer satisfaction by including in the telephone survey questions on image attributes and performance measures, in combination with questions about customers' personal experiences on Indiana's highways**

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What Are Participants' Expectations of INDOT?

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What Are Participants' Expectations of INDOT?

1. *Recognize that the future won't be the same as the past*

2. *INDOT should be fully responsible*

3. *INDOT should lead –*

   a. **Put the team together**

   b. **Plan**

   c. **Involve the public so that the plans serve the collective good, not just special interests**

   d. **Make decisions**

   e. **Act**

4. *Educate and communicate more*

5. *Develop a customer service culture*

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What Are Participants' Expectations of INDOT?
(continued)

1. **Recognize that the future won't be the same as the past**

- "You're talking about an old highway system here. . . . It's an antique . . . We need a fast, efficient train system or rail system or bus system . . . Why not expand your ideas of public transportation?"

- "We need an efficient combination of trains, buses, airport, and an efficient highway system for individual automobiles. But the individual automobile has to, some day soon, come down to a reasonable number. We will have to use more public transportation."

- "Get someone from California or someplace like Washington or Denver or wherever to come in . . . Bring in new technology and new ideas."

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What Are Participants' Expectations of INDOT? (continued)

2. **INDOT should be fully responsible**

   - "The Department of Transportation of the state should be responsible for every little bitty inch of [the system]. The city of Indianapolis is a part of the state. If you're going to have an efficient system, it has to be state wide."

   - "Real development is . . . broad . . . You've got to branch out."

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What Are Participants' Expectations of INDOT? (continued)

3. *INDOT should lead*

    a. **Put the team together**

        - "[INDOT] should see that, as a team, everybody's working together to build the city. They have a responsibility."

What Are Participants' Expectations of INDOT? *(continued)*

3. *Lead (continued)*

    b. Plan

- "I believe their responsibility is to plan – design, with public input, within a reasonable budget, an efficient, futuristic highway system or public transportation system . . . efficient, clean, safe transportation for an optimal number of people."

- "Geological studies. Transportation studies. Study every aspect of it. Blueprint it out . Forecast what's going to happen. Itineraries. Timelines. How's it going to happen? When's it going to happen? How are you going to pay for it to happen? That's planning. That's everything. That's the foundation of what happens."

What Are Participants' Expectations of INDOT? *(continued)*

3. *Lead (continued)*

    c. **Involve the public so that the plans serve the collective good, not just special interests**

        - "It's a clique . . . It's the whole 'you scratch mine, I'll scratch yours.'"

        - "They are pulled by God knows how many different factions . . . [If] they got a guy in South Bend that wants something . . . it is according to how much juice he has got as to whether he can . . . exert enough pressure on them to get what he wants."

        - "They need to have more public meetings open to the public, instead of [just listening to] these little cities."

What Are Participants' Expectations of INDOT? *(continued)*

3. **Lead** *(continued)*

   d. **Make decisions**

- "Hire somebody with the guts to go in there, go to a meeting and say, 'Come on, guys, let's do something.'"

   e. **Act**

- "Indiana is notorious for having many general assembly discussions and spending a lot of money and never producing any efforts."

- "You're going to have to get up off your little tutu and do some work . . . You can't sit at a table and just have meetings. You've got to move. You've got to do something."

What Are Participants' Expectations of INDOT? *(continued)*

4. Educate and communicate more

- "They can do a better job of identifying themselves so the public knows who they are and what they're responsible for."

5. Develop a customer service culture

- "Nobody has a clue that their main responsibility is to be of public service."

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Appendices (Under Separate Cover)

Focus Group Pre-Screener Questionnaire

Focus Group Survey and Analysis

Focus Group Protocol

Focus Group Transcripts

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