NCDOT CUSTOMER SERVICE SURVEY 2020-21

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RESEARCH & DEVELOPMENT

2020–21

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16. Abstract

Across North Carolina, the North Carolina Department of Transportation (NCDOT) provides transportation services for a variety of functions and uses. Customer satisfaction is identified as an NCDOT priority as part of the department's Strategic Plan. Since 2015, NCDOT has measured customer service through a statewide survey focused on asking customers about key elements of interest to the department. This survey continues to provide useful insights that can be used to improve customer satisfaction and track progress over time, with a focus on NCDOT's mission and goals.

This summary outlines the results of the 2020-21 survey, which was completed by nearly 5,000 North Carolina residents. This customer survey was conducted in the fall of 2021 using convenience sampling as well as two additional oversampling efforts to ensure populations that are typically more difficult to reach were surveyed.

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Executive Summary

Introduction

The North Carolina Department of Transportation (NCDOT) provides transportation services for a variety of purposes to customers across the state. Customer satisfaction is a priority for NCDOT that is empathized in the department's Strategic Plan. Since 2015, NCDOT has measured customer service through a statewide survey focused on asking customers about key services and programs of interest to the department. This annual survey continues to provide useful insights that can be used to improve customer satisfaction and track progress over time, with a focus on NCDOT's mission and goals.

This summary outlines the results of the 2020-21 survey (referred to as the "2021" survey in this document), which was answered by nearly 5,000 North Carolinians. The survey is conducted annually and the sampling method alternates; a convenience sample is conducted one year and a random sample is conducted the next. This customer survey was conducted in the fall of 2021 using a convenience sampling method. An additional targeted oversampling effort was conducted to survey demographic groups that are typically challenging to reach through the convenience sample.

The overall NCDOT customer satisfaction rate for 2021 survey participants was 71%. The vast majority (93%) of respondents reported using a personal vehicle as their primary mode of transportation and 95% of respondents reported having access to a usable and reliable vehicle of their own. Overall, 72% of respondents reported that they have sufficient access to the transportation system in North Carolina and 67% of respondents reported that they do not experience barriers to using the transportation mode that they want to use. Additionally, 71% of respondents reported that they feel supported by North Carolina's transportation system.

Oversampling Results

To reach specific demographics and to provide a more representative survey sample, an oversampling effort was conducted in addition to the base survey sample. A total of four demographic groups were targeted: individuals ages 18 to 24 and ages 25 to 34, individuals who identify as Black/African American, and individuals who identify as Hispanic. Oversampling of these groups resulted in representation that more closely aligned with the actual demographic composite of North Carolina, as displayed in Figures 1 and 2.

Weighting

As part of the survey, respondents were asked to share which demographic categories that best describe them. These categories were consistent with those included in the United States Census Bureau's American Community Survey. While oversampling efforts helped increase the total diversity of respondents, the convenience sample, which comprises the majority of the total survey sample, was not representative of North Carolina's demographic makeup. Therefore, a basic weighting scheme was employed to ensure the survey results are more representative of North Carolina's population.

Valid survey responses from both the convenience sample and oversampling effort were weighted to be more representative of age, gender, Hispanic origin, and ethnicity. Weights were determined by comparing the proportion of a specific demographic within the survey sample to that of the adult population of North Carolina. An individual weight was applied for each demographic observed and then multiplied together to identify the total weight. This type of weighting is a standard approach in survey research.

The specific formula to determine a weight for an individual respondent is as follows:

Untrimmed weight =

$$\frac{\text{Gender (Population)}}{\text{Gender (Survey)}} \times \frac{\text{Age (P)}}{\text{Age (S)}} \times \frac{\text{Ethnicity (P)}}{\text{Ethnicity (S)}} \times \frac{\text{Hispanic Origin (P)}}{\text{Hispanic Origin (S)}}$$

For example, the weight for a white (not of Hispanic origin) female respondent within the 25-34 age range would be calculated as follows:

$$\frac{.5211}{.5831} \times \frac{.1363}{.0707} \times \frac{.7111}{.7559} \times \frac{.9021}{.9310} = 1.569$$

Additionally, artificially high individual weights were trimmed within four standard deviations plus the average weight, creating a more normal distribution and preventing any one individual from substantially skewing results. The above example weight would not be trimmed because it is within four standard deviations plus the average weight.

Demographics

The following data presents a summary of the direct participant demographics for both the convenience sample as well as the oversampling effort. The oversampling effort helped make the survey participant sample align more closely with the actual demographic composition of North Carolina adults. This summary shows the weighted percentage of each demographic type (such as gender) that a given demographic group (such as those who identify as female) comprises in the random survey sample respondents compared to the North Carolina population as a whole. The state-level data utilized to measure representation is based on NC State Demographer projections for 2021 and US Census data.

Gender

- **Males: 47.9%** of North Carolina, **47.0%** of survey respondents
- **Females: 52.1%** of North Carolina, **53.0%** of survey respondents

Age

- **18-24 Years: 12.6%** in North Carolina, **15.9%** of survey respondents
- **25-34 Years: 16.5% i**n North Carolina, **18.6%** of survey respondents
- **35-44 Years: 16.6%** in North Carolina, **18.3%** of survey respondents
- **45-54 Years: 16.4%** in North Carolina, **17.1%** of survey respondents
- **55-64 Years: 16.1%** in North Carolina, **16.2%** of survey respondents
- **65 or Older: 21.9%** in North Carolina, **13.9%** of survey respondents

Race

- **White/Caucasian: 71.1%** of North Carolina, **64.2%** of survey respondents
- **Asian or Pacific Islander: 3.5%** of North Carolina, **2.5%** of survey respondents
- **Native American including Alaskan Native: 1.6%** of North Carolina, **0.8%** of survey respondents
- **Black/African American: 20.3%** of North Carolina, **20.0%** of survey respondents
- **Hispanic/Latino: 9.8%** of North Carolina, **10.0%** of survey respondents
- **Multiracial: 3.4%** of North Carolina, **2.4%** of survey respondents

RACE, WITH AND WITHOUT OVERSAMPLING EFFORT

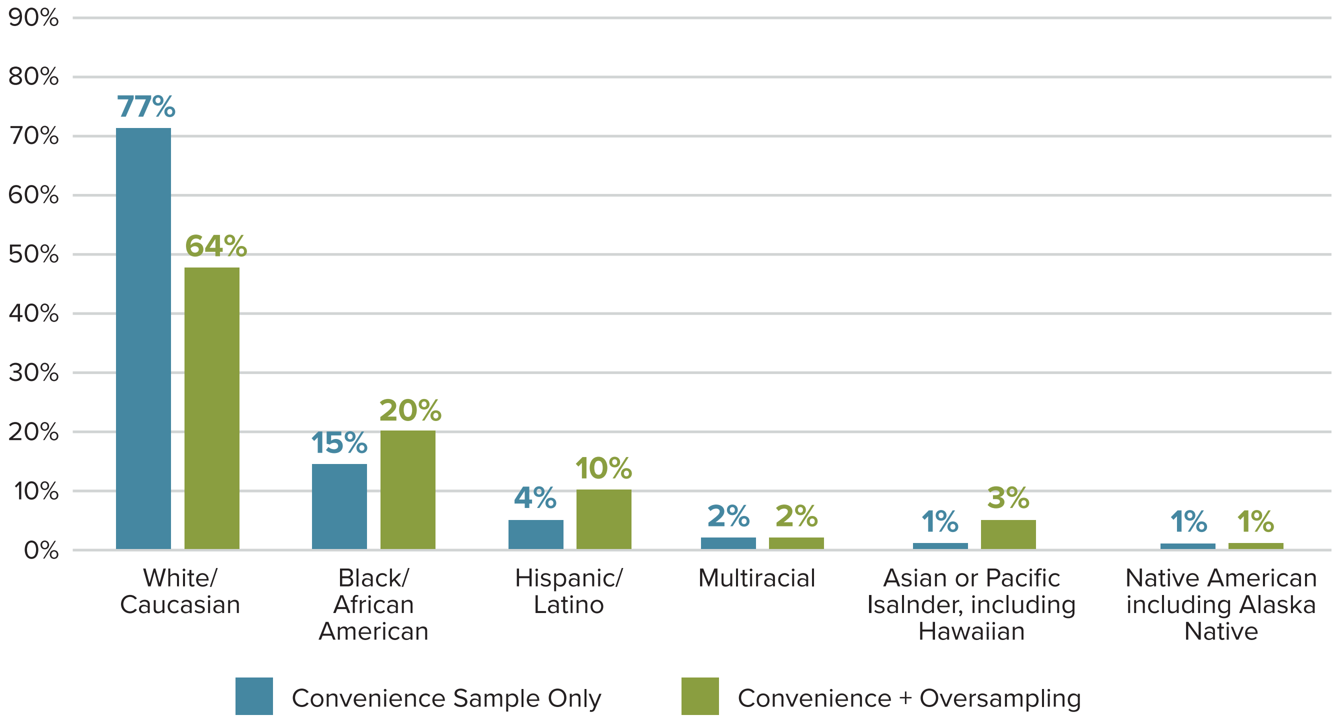


Figure 1: Participants by Race, weighted

AGE, WITH AND WITHOUT OVERSAMPLING EFFORT

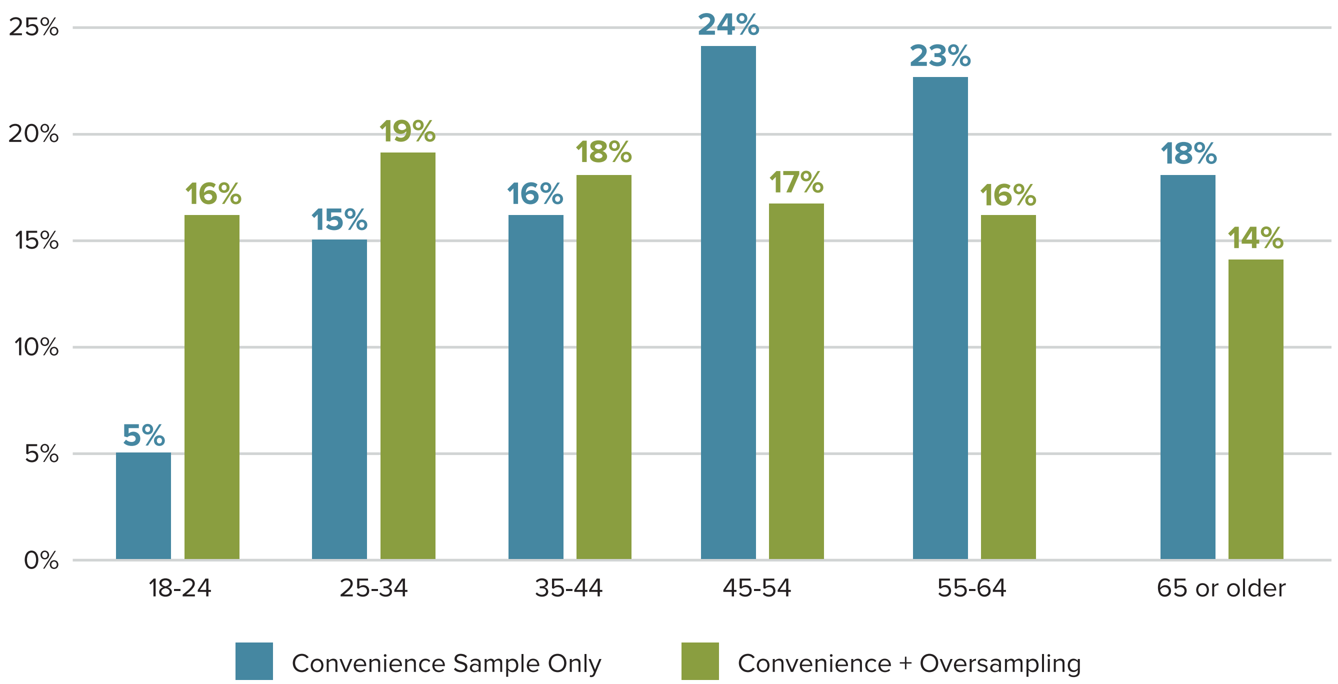


Figure 2: Participants by Age, weighted

Survey Adjustments

Compared to the previous year, several adjustments were made to the 2021 survey.

Additional questions and response options were added to the survey to capture whether respondents feel they have sufficient access to the transportation system, experience any barriers to using their desired transportation mode, feel supported by the transportation system, and have access to a reliable personal vehicle.

In the 2019-20 survey, significant changes to the survey were made to reflect potential lifestyle changes resulting from the COVID-19 pandemic. While many questions were reverted back to the wording used as part of the 2018-19 survey, some response options (such as those pertaining to health) were maintained.

Overall Satisfaction Rate

The overall customer satisfaction rate for the 2021 survey participants was 71%. This is a slight decrease from 74% in 2020, and an increase from 58% in 2019. This satisfaction rate is compared to that of previous survey years in Figure 3. Caution should be used when comparing satisfaction across years, as some of the survey methods have changed over time. For example, the satisfaction rate for the 2019 survey is notably lower than other years. This may be the result of some changes to the survey, as the 3-point Likert scale used in previous survey years was converted to a 5-point Likert scale in 2019, which may have resulted in fewer respondents opting to select the "neutral" satisfaction category. Respondents who may have otherwise reported their satisfaction as "neutral" in previous years may have selected a different response option in the new, broader scale because they felt that it better represented their opinion, reducing the overall satisfaction rate compared to past years.

It is also worth noting that when a convenience sample is conducted, which occurs every other year, satisfaction is generally lower. This may be because the survey is posted and advertised online, which may attract more respondents who are opting to participate to share strong opinions about NCDOT.

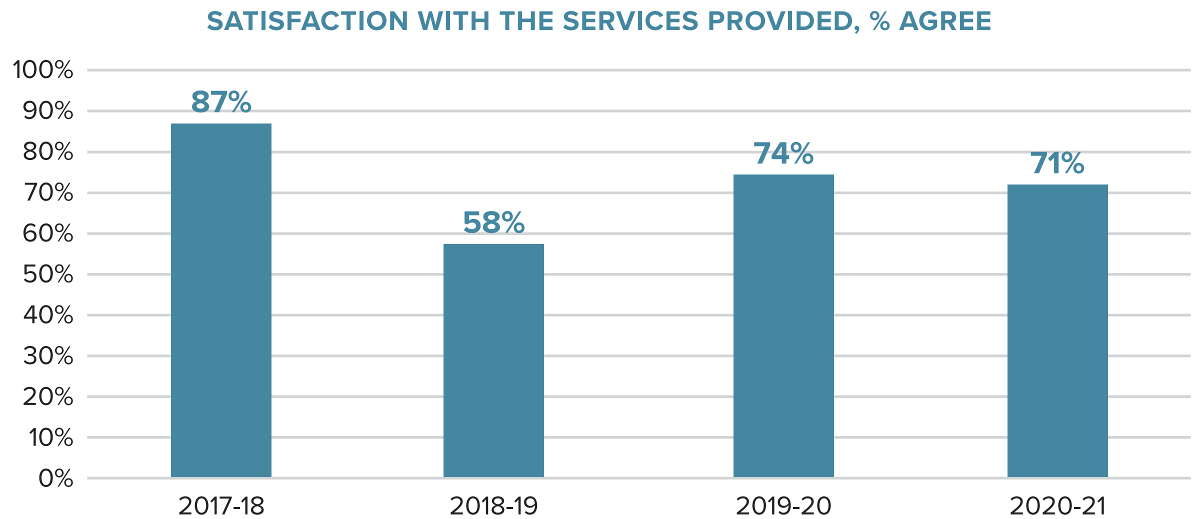


Figure 3: Level of Satisfaction

Overall Responses

The following section outlines the results of the convenience and oversampling effort conducted through this study. Note that not all participants responded to all questions.

Satisfaction

Overall, 71% of respondents said they were satisfied with transportation services in North Carolina.

Primary Mode

Respondents reported their primary means of transportation as follows:

- **93%** of respondents use a **personal vehicle** as their primary means of transportation (83% as a driver and 9% as a passenger).
- **2%** use a **work vehicle**
- **2% walk**
- **2%** use a **personal bicycle**
- **1%** use **public transportation**
- **<1%** use p**ay-to-use bicycles or scooters**
- **<1%** use **ferries**
- **<1%** use **another mode** as a primary means of transportation

Time in North Carolina

In terms of time in North Carolina:

- **40%** of respondents have lived in North Carolina for **more than 30 years**
- **20%** have lived in NC for **21-30 years**
- **19%** have lived in NC for **11-20 years**
- **9%** have lived in NC for **6-10 years**
- **10%** have lived in NC for **1-5 years**
- **3%** have lived in NC for **less than 1 year**

Of those respondents who have moved to North Carolina somewhat recently, **59%** rated transportation services offered in NC as better or the same as their previous residence.

Service Priorities

Respondents rated the following services as those that should receive the most emphasis over the next two years:

- Maintenance of roadways **(27%)**
- Safety of roadways **(21%)**
- New construction of roadways **(17%)**
- Local/public/city buses **(9%)**
- Pedestrian transportation **(9%)**
- Trains **(7%)**

- Bicycle transportation **(6%)**
- Airports **(2%)**
- Ferries **(2%)**

These results are based on the services each respondent report as their top three priorities.

Key Findings

In addition to the overall results described in previous sections, the research team identified survey results of interest related to travel trends and patterns identified in the data. These findings are described in the following sections.

Transportation Infrastructure Support

Four new questions were added to measure respondents' perceived access to and support from transportation infrastructure in North Carolina. Overall, 72% of respondents felt that they have sufficient access to the transportation system in North Carolina, while 67% of respondents reported that they do not experience barriers to using the transportation mode that they want to use. Of those who responded to the questions, 71% reported that they feel supported by the transportation system in the state. Most respondents, 95%, reported that they have access to a usable and reliable vehicle of their own.

Vehicle access by income is presented in Figure 4. Only 78% of respondents earning less than $25,000 a year said they have access to a usable and reliable vehicle, and 90% of respondents earning between $25,000 and $49,999 said they have access to a usable and reliable vehicle. In comparison, 97% of those earning between $50,000 and $99,999 said they have access to a usable and reliable vehicle, and 99% of those earning $100,000 or more said they have access to a usable reliable vehicle. This shows a disparity in vehicle access by income level.

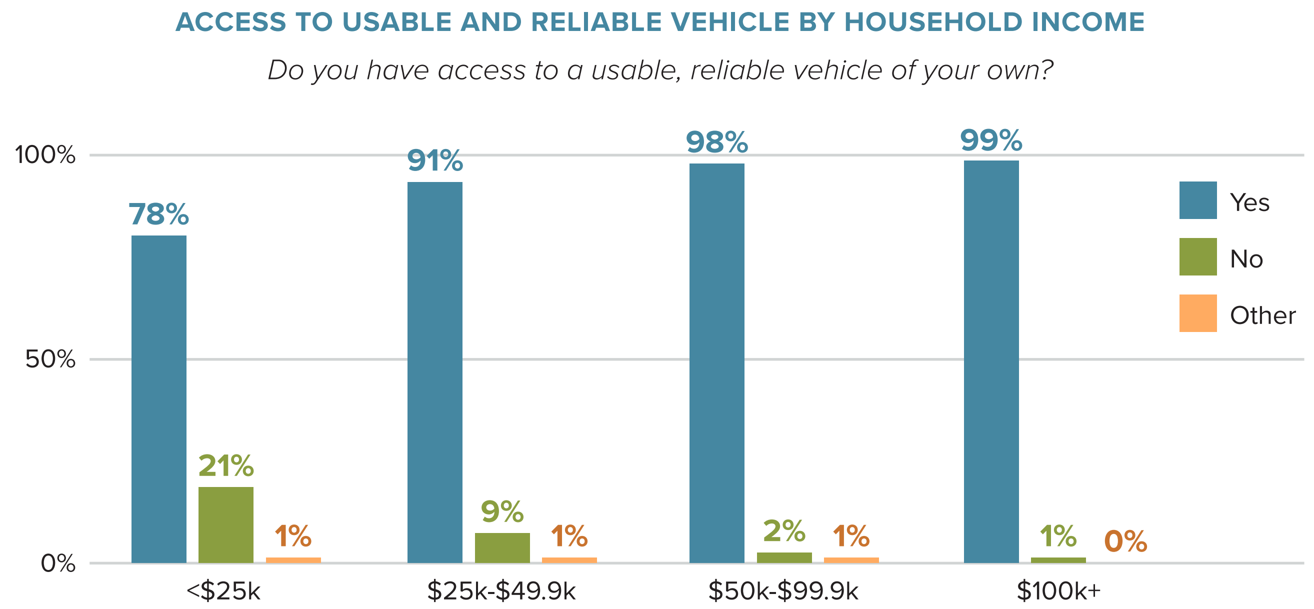


Figure 4: Access to usable and reliable vehicle by household income

Personal Vehicle Use by Year

In 2020, there was a marked shift in the number of respondents driving a personal vehicle every day. This was likely because of an increase in working from home and an overall reduction of activity due to COVID-19. In 2021, the number of respondents who indicated that they drive every day increased, though the overall proportion is still greatly lower than pre-pandemic levels. It is possible that many people still work remotely or have permanently altered their travel habits for other reasons. These results are presented in Figure 5.

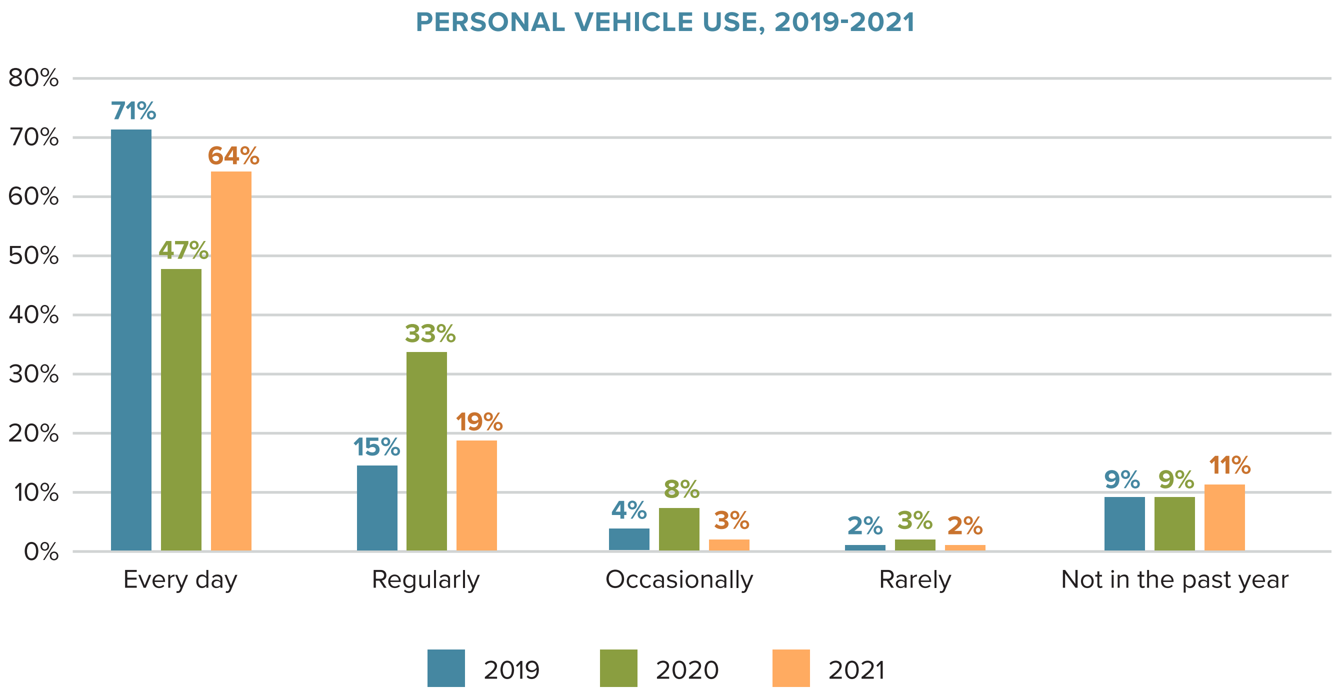


Figure 5: Personal Vehicle Use, 2019-2021

Variance by Income

Primary mode use differed between household income brackets, as shown in Figure 6. For the purposes of this survey, respondents were asked to report their total household income before taxes and other withholdings. Respondents in lower income groups drive a personal vehicle at a much lower rate than respondents in higher income brackets. Lower income groups are also more likely to be vehicle passengers compared to higher income groups. This may be due to challenges associated with affording a personal vehicle and/or the affordability of riding with someone else due to fuel cost. As indicated earlier in this report, respondents in lower income groups do not have the same access to a reliable and usable vehicle as those respondents with higher income.

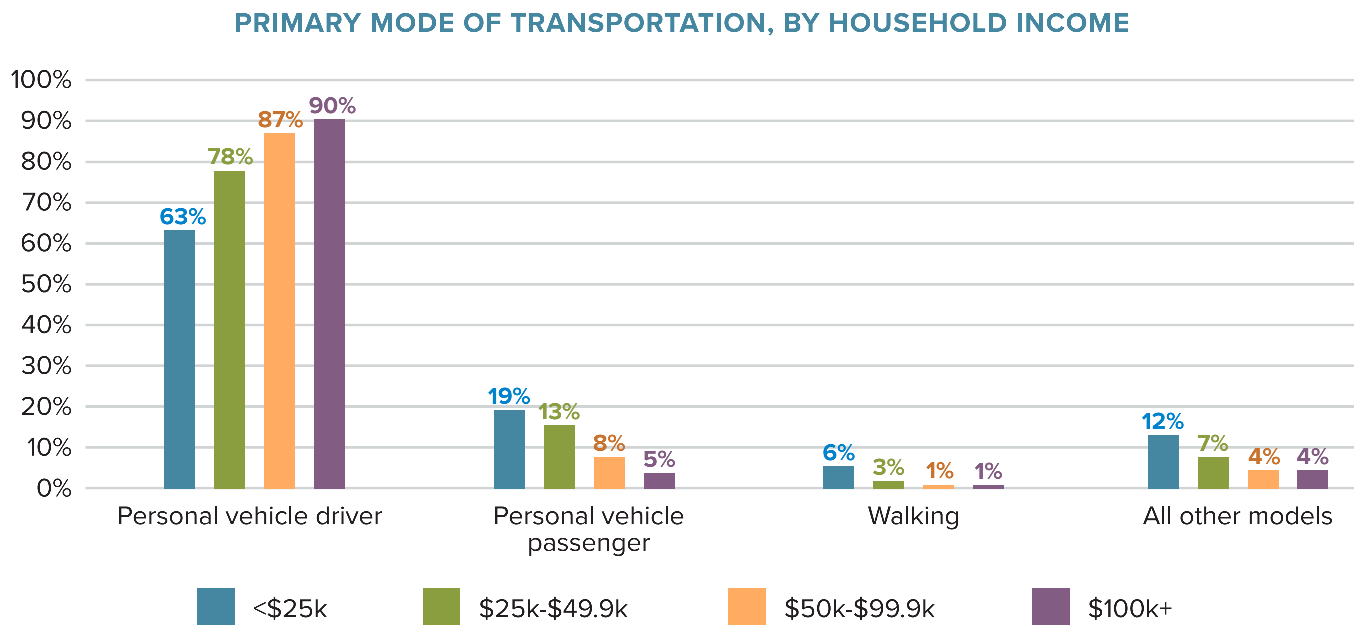


Figure 6: Modal Choice Variance by Household Income

Satisfaction by Mode/Unit

For all modes except bicycle, the average satisfaction across services met or exceeded 50% across categories. This is typical across survey years. These results are shown in Figure 7.

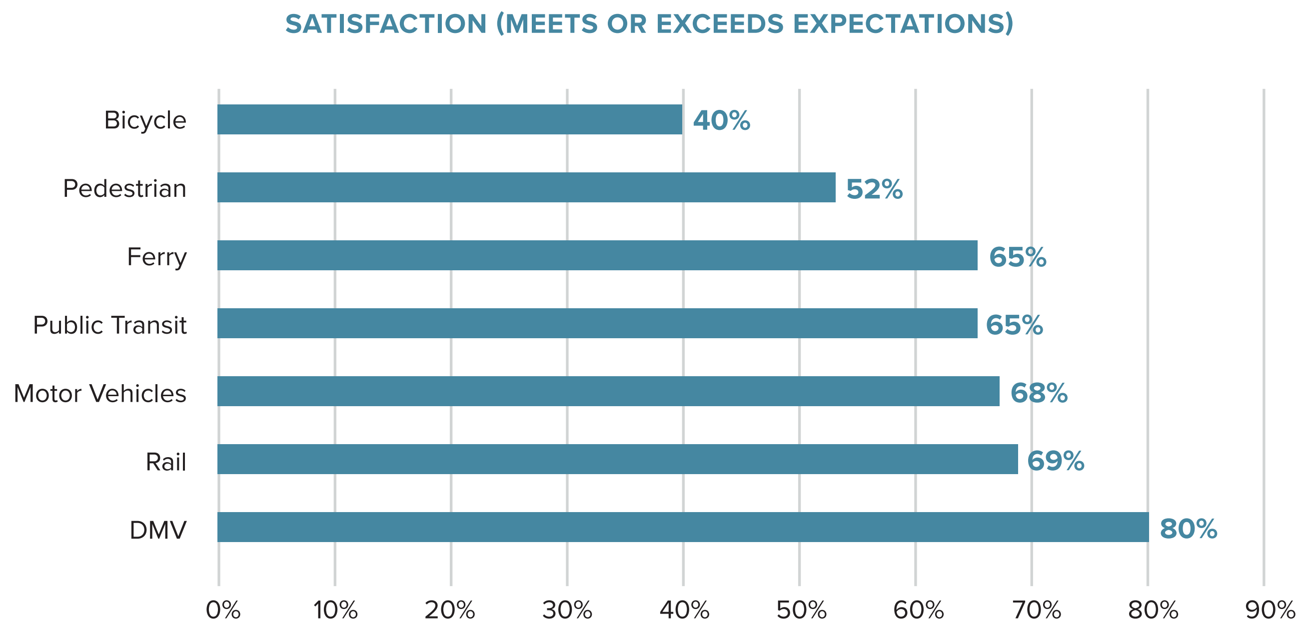


Figure 7: Expectation Achievement by Mode/Unit

Results by Mode

The survey also included both mode-specific and general agency-level questions, the results of which are described in the following section.

NCDOT Communications

Eighteen percent of respondents reported that electronic message boards on highways were the most effective way for NCDOT to provide information such as traffic conditions and roadway projects. An additional 17% of respondents said that signs on roadways were the most effective, and 12% said social media was the most effective method. More respondents (10%) thought that text messages would be an effective way to provide information than in 2020 (8%).

Top 5 most effective ways to provide information:

18% Electronic Message Boards

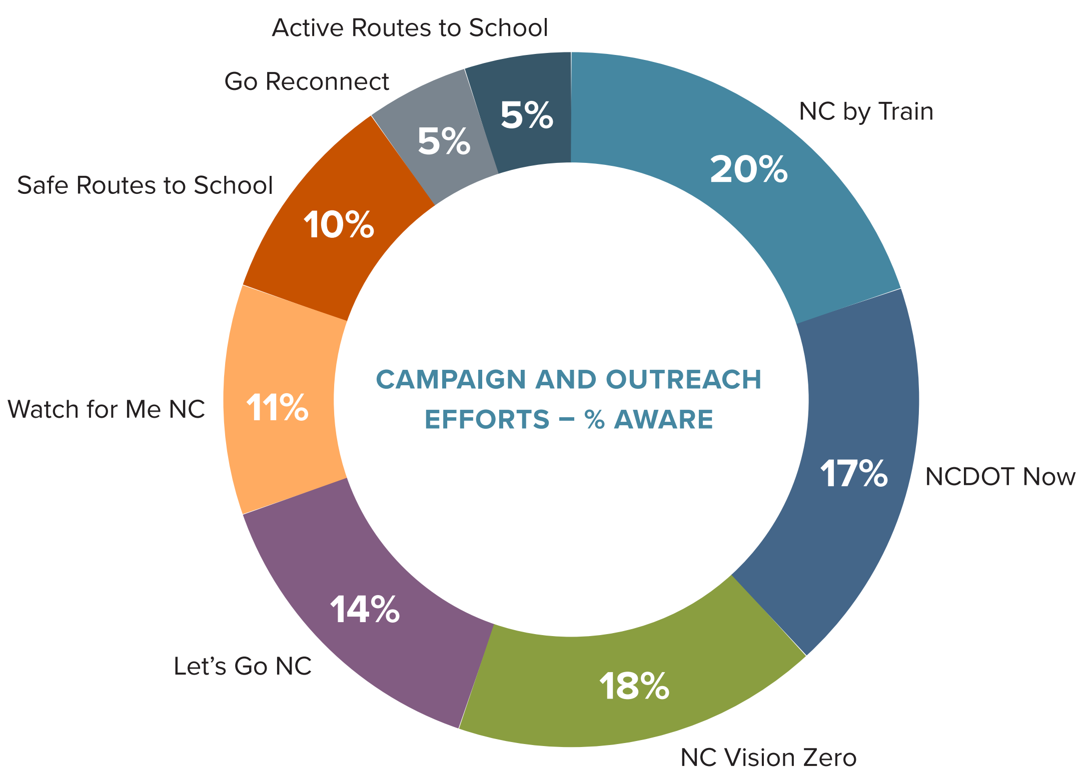
17% Signs on Roadways

12% Social Media

10% Text Messages

10% Local TV

Compared to 2020, respondents' knowledge of various campaigns and outreach efforts shifted. Many more respondents were aware of NC Vision Zero (18% in 2021, versus 2% in 2020), while knowledge of NCDOT Now, NC by Train, and Let's Go NC decreased. For example, 31% of respondents were aware of NCDOT Now in 2020, only 17% of respondents were aware in 2021. These decreases may be due to lingering changes in travel stemming from the pandemic, which could impact the level of which respondents were exposed to campaign messages.



Division of Motor Vehicles

Seventy-four percent of respondents said they visited a Driver License DMV office in North Carolina in the past year. This is a sharp increase from forty-two percent in the 2020 survey, a change likely related to the COVID-19 pandemic. The following results include responses from survey participants who reported that they visited a North Carolina DMV at least once in the past year. In deciding which DMV office to visit, respondents considered location (44%), shorter wait times (18%), previous experience (12%), the attitude of employees and customer service (10%), and hours of operation (7%).

Top 3 most important DMV service characteristics:

- **Length of wait time at DMV office (30%)**
- **Overall quality of customer service at DMV office (20%)**
- **Convenience of hours of operation at DMV office (20%)**

Overall, services at DMV offices met or exceeded the expectations of 73% of participants. This is lower than 2020, although it is important to note that a much higher percent of respondents had directly interacted with the DMV in 2021 than in 2020. Additionally, 80% of respondents found the courteousness of DMV employees to meet or exceed their expectations, 76% of respondents found that clarity of instructions met or exceeded their expectations, 75% of respondents found the convenience of hours of operations to meet or exceed their expectations, and 64% of respondents found that the amount of time they waited for service met or exceeded their expectations. Overall, the expectations of respondents were similar to 2020. Respondents prioritized the length of wait time at a DMV office (32%), overall quality of customer service at a DMV office (20%), and convenience of hours of operation at a DMV office (19%) as the three most important services on which to focus.

Personal Vehicle Drivers and Passengers

Sixty-four percent respondents reported driving or riding in a personal vehicle every day compared to 2020, a marked increase from 47% in 2020. However, the number of respondents who drive or ride in a vehicle every day is still lower than pre-pandemic levels. The number of respondents who did not drive or ride in a vehicle in the past year rose slightly from 9% to 11%. Nineteen percent of respondents reported driving or riding in a vehicle regularly (a few times a week), a decrease from 33% in 2020, but an increase from 15% in 2019.

The median time spent in a vehicle was reported as approximately 50 minutes on Tuesday and Thursday, 45 minutes on Saturday, and 30 minutes on Sunday. Compared to 2020, respondents reported driving more on Tuesday, Thursday, and Saturday, and the same amount of time on Sunday.

More respondents reported driving or riding in a car every day but the total percent is still lower than 2019.

Over half (52%) of respondents said they rely on apps like Waze and Google maps to help them make decisions about their daily commute. An additional 43% of respondents said they rely on their past experience with roadways.

Sixty-eight percent of respondents were satisfied with all services, on average. Respondents felt most dissatisfied with smoothness of highway and interstate surfaces (59% satisfied), the overall flow of traffic (57% satisfied), and removal of trash and debris along highways and interstates (61% satisfied). Respondents were most satisfied with the safety and cleanliness of rest areas (88% and 89% satisfied, respectively), maintenance of guardrails (83% satisfied), and the spacing of exit and crossroad signs (82% satisfied). These findings are consistent with previous years.

Respondents rated the overall flow of traffic on highways and interstates (33%), the safety of highways and interstates (30%), and the smoothness of highways and interstates (28%) as the most important services for NCDOT to focus on. In 2020, respondents thought the top focus should be the smoothness of highway and interstate surfaces.

Top 3 most important vehicle services:

- **Overall flow of traffic on highways and interstates (33%)**
- **Safety of highway and interstates (30%)**
- **Smoothness of highway and interstate surfaces (28%)**

Bicyclists

Twelve percent of respondents said they ride a bicycle every day or more than once a week, while an additional 15% reported that they ride a bicycle a couple of times each month. The median daily travel time was approximately 43 minutes.

Respondents who said they did not ride a bicycle in the past year reported that they were not interested in riding a bicycle (28%), had safety concerns about riding on or near roads (24%), or felt that they lack areas to bike (22%).

Top 3 most important bicycle services:

- **Access to bike lanes, wide shoulders, and bicycle-friendly shared lanes (21%)**
- **Location of bike lanes, wide shoulders, and bicycle-friendly shared lanes (13%)**
- **Connectivity of bicycling facilities (13%)**

Amongst respondents who reported riding a bicycle at least a couple of times a year, 38% typically rode a bicycle for exercise or recreation. Respondents also reported riding a bicycle to visit friends or family (14%) and to get to shopping or dining areas (11%).

This mode historically has the lowest satisfaction rates, which was consistent in 2021. The average satisfaction rate across all categories was 40%. Expectations were best met for drainage on bike paths (52%) and access to off-road greenways or other separated bicycle facilities (46%). Location of bike lanes, wide shoulders, and bicycle-friendly shared lanes were rated as the least satisfactory, with 58% of respondents identifying this group of attributes as not meeting their expectations.

Respondents rated access to bike lanes, wide shoulders, and bicycle-friendly shared lanes (21%); location of bike lanes, wide shoulders, and bicycle-friendly shared lanes (13%); and connectivity of bicycling facilities (13%) as the three modes that should receive the most attention over the next couple of years. This is consistent with rankings from 2020.

Pedestrians

Fifty-five percent of respondents said they walk, jog, or run on a sidewalk, greenway, or walkway every day or more than once a week, while an additional 23% responded that they do so a couple of times each month. These numbers increased greatly compared to 2020. The median time traveled during a typical trip was 30 minutes for both walking and jogging or running, which is a decrease from 50 minutes in 2020. Respondents in urban counties indicated that they walk, jog, or run more frequently than those in rural counties.

Top 3 most important pedestrian services:

- **Access to pedestrian walkways and/or sidewalks (20%)**
- **Safety of pedestrian walkways, sidewalks, or crossing locations (18%)**
- **Access to greenways or trails (12%)**

The following results include responses from survey participants who reported that they walked, jogged, or ran on a sidewalk, greenway, or in North Carolina at least a couple of times in the past year. Respondents who did not walk, jog, or run in the past year cited they did not do so primarily due to preference (30%), lack of infrastructure (27%), and personal physical condition (15%). Those who did walk, jog, or run in the past year typically did so for exercise or recreation (35%), to walk a pet (16%), or to go to a shopping or dining location (13%).

Across all categories, 52% of respondents rated pedestrian services as either meeting or exceeding their expectations. Forty-two percent of respondents reported that the education of roadway users about interacting safely with pedestrians did not meet their expectations, and 38% of respondents reported that the visibility of lighting along sidewalks and greenways did not meet their expectations.

The three transportation areas that respondents indicated should receive the most emphasis over the next two years were access to pedestrian walkways and sidewalks (20%), safety of pedestrian walkways, sidewalks, or crossing locations (18%), and access to greenways or trails (12%).

Public Transportation (NOTE: Small sample size)

Five percent of respondents said they ride a public/local/city bus in North Carolina every day or more than once a week, while an additional 5% responded that they ride a public/local/city bus a couple of times each month. This is an increase from the 1% of respondents in the 2020 survey who reported riding a bus every day or more than once a week. Overall, lower ridership is likely contributable to reduced service due to the COVID-19 pandemic over the past two years.

Top 3 most important bus services:

- **Access to public/local/city buses (15%)**
- **Access to park-and-ride lots (8%)**
- **Reliability/timeliness of buses (8%)**

The following results include responses from survey participants who reported that they used public/local/city buses in North Carolina at least a couple of times in the past year. Twenty percent of respondents reported using a bus to get to or from work. An additional 18% of respondents reported using a bus to access recreation, and 18% reported using a bus to visit friends or family.

Twenty-six percent of respondents reported that they would be more likely to ride the bus more frequently if there were routes that met their needs and 22% reported that stops closer to their intended destination would make them more likely to use the bus.

Overall, 65% of respondents indicated that their expectations were met or exceeded. Respondents were most dissatisfied with weather protection at bus stops (53% satisfied), access to park-and-ride lots (57% satisfied), and how long it takes the bus to get them where they want to go (63% satisfied).

Respondents rated access to public/local/city buses (38%), access to park-and-ride lots (8%), and the reliability and timeliness of buses (8%) as the three services that should receive the most attention over the next two years.

Passenger Train (NOTE: Small sample size)

Less than one percent of respondents said they rode a passenger train in North Carolina every day. Of those who responded that they rode a passenger train, 1% reported riding a passenger train a couple of times a week and 11% reported that they ride a passenger train a couple of times per year. Because of the COVID-19 pandemic over the past two years, passenger train service has been reduced, likely contributing to the low number of respondents. Fifty-five percent of respondents reported using a passenger train five times or less. Overall, more respondents reported riding a passenger train than in 2020, although the total number of respondents is still low.

Top 3 most important rail services:

- **Access to passenger train stations and routes (16%)**
- **Frequency of trains servicing desired route (15%)**
- **Reliability/timeliness of passenger trains (10%)**

Thirty-two percent of respondents reported not traveling by train more often because of personal preferences and 18% reported a lack of train routes where they need to go. Thirty-three percent of respondents indicated that they would travel by train more frequently if there were train routes where they needed to go, 22% if there were closer stations, and 16% if it were easier. Twenty-two percent of respondents reported riding a passenger train for recreation and to visit friends and/or family.

Overall, 69% of respondents across all satisfaction questions rated passenger train services as meeting or exceeding expectations. Thirty-three percent of respondents rated the frequency of trains servicing their desired route as not meeting their expectations. Respondents rated access to passenger train stations and routes (16%), frequency of trains servicing desired route (15%), and the reliability and timeliness of passenger trains (10%) as the three services that should receive the most attention over the next two years.

Ferries (NOTE: Small sample size)

Twenty five percent of respondents said they rode a ferry in North Carolina in the past year. This is an increase from 2020, but still a relatively small portion of the sample. Respondents reported not riding a ferry more frequently because they did not need to cross water to reach their destinations (46%) or were not interested (10%).

Across all services, satisfaction was 65%. Respondents were most satisfied with the convenience of ticketing and reservation options (79%) and least satisfied with the availability and quality of food and drink onboard (53%).

Top 3 most important ferry services:

- **Frequency of ferry service on desired route (17%)**
- **Availability of ferry schedule and information (14%)**
- **Reliability/timeliness of ferry service (13%)**

Respondents rated frequency of ferry service on desired route (17%), availability of ferry schedule and information (14%), and the reliability and timeliness of ferry service (13%) as the three services that should receive the most emphasis over the next two years.

Aviation

Thirty-nine percent of respondents reported flying to or from a North Carolina in the past year, a twenty percent increase from 2020. Thirty-seven percent of respondents reported that they did not fly more frequently in the past year because they had no need to, an additional 20% cited cost as a limiting factor. Thirty-one percent of respondents reported flying for recreation, such as a vacation, and 29% reported flying to see friends or family. Because NCDOT's role in aviation is different than the other modes, this segment of the survey has been reduced over time to optimize the content and length of the survey.

Conclusion

The fifth iteration of NCDOT's statewide customer service survey continues to capture the experiences and opinions of North Carolinians as they travel. The use of oversampling methods continues to provide survey results that are more representative of North Carolina's true demographics.

The result of the most recent survey shows that the COVID-19 pandemic is still impacting how people experience North Carolina's transportation system. For example, while vehicle ridership is up from 2020, there was also an increase in respondents who reported not driving regularly, a potential result of lifestyle changes that began due to the pandemic. While the use of many modes has increased compared to changes seen at the beginning of the pandemic, overall usage of the transportation system is still lower than years prior to the pandemic.

New questions were added to the survey the survey this year to capture whether respondents feel they have access to and are adequately supported by the transportation system.

Most respondents indicated that they feel supported by the transportation system, have access to a usable and reliable vehicle, and do not experience barriers to the transportation system. However, there are clear disparities between income groups in the state. For example, 21% of respondents earning less than $25,000 a year reported that they do not have access to a usable and reliable vehicle, compared to only 3% of those earning between $50,000 and $99,999 indicating that they do not have access.

Consistent with 2020, satisfaction continues to be generally high with most modes apart from bicycle riders.