TO: Florida Department of Transportation
FROM: The Schapiro Group, Inc.
DATE: August 19, 2014
RE: $\quad$ Customer Satisfaction Tracking Study — District 5 Results

The Schapiro Group (TSG) interviewed 300 Florida freeway drivers across District 5 as part of a larger statewide survey effort to explore ongoing usage of, attitudes toward, and perceptions of the Florida Department of Transportation's (FDOT) Intelligent Transportation Systems (ITS) services. Data collected in 2006, 2008, 2010, and 2012 in addition to the 2014 results, allow for changes in usage and attitudes to be tracked over time. During the months of April-June 2014, TSG randomly sampled phone numbers within Orange, Osceola, Seminole, and Volusia Counties to obtain scientific telephone survey data. The margin of sampling error for results is $\pm 5.7 \%$. This report summarizes key changes in attitudes and behaviors regarding ITS services over the past eight years.

Some research highlights from District 5 include:

## Driving Patterns and Traffic Information Services

- The number of drivers on the road in District 5 has remained relatively steady during the morning rush, daytime, and afternoon rush hours, but has slightly decreased in the evening.
- The overall use of radio as a source of traffic information has remained the same since 2010, while the percentage of drivers turning to television dropped from 59\% in 2012 to $46 \%$ this year. A majority of those who get traffic information from radio and television still sees these resources as at least somewhat useful.
- Drivers use several different sources for their traffic information. Just over half ( $54 \%$ ) use electronic message signs (down from $78 \%$ in 2012), $52 \%$ use in-car navigation systems (up from $30 \%$ in 2012), one-third ( $33 \%$ ) use mobile apps, and one-third ( $33 \%$ ) use websites on their computer or cell phone (up from $22 \%$ in 2012). All other tested sources are used by less than $15 \%$ of drivers.
- Among drivers who use websites for traffic information, the top site is Google, whose usage doubled to $29 \%$. As in 2012, $13 \%$ use local TV and radio station websites, though $43 \%$ of drivers indicate some other site or they do not know.
- Starting in 2014, we asked drivers who use mobile apps for traffic information about their main mobile app for this kind of information. Google maps ( $32 \%$ ) is the leader, with another $10 \%$ using local radio and television station apps. Just under half ( $48 \%$ ) indicate some other site or they do not know.


## ITS Services: 511 Traveler Information System

- When asked if they would use a service that provided traffic information through a phone call, website, mobile app, or social media site, the percentage of drivers who say that they would be likely to use it increased to $54 \%$ (up from $44 \%$ two years ago).
- Awareness of the 511 Traveler Information System decreased slightly to $42 \%$ in 2014. In that same time period, the percentage of drivers who know about 511 and use the service held steady at around one-third ( $35 \%$ ). District 5 drivers continue to say that they are most likely to find out about 511 through signs on the freeway or a friend or acquaintance.
- Starting in 2012, respondents who use the 511 Traveler Information System are now asked which services they use. The most popular continues to be the call-in service, though usage dropped from $87 \%$ in 2012 to $53 \%$ of drivers this year. The $32 \%$ of drivers using the mobile app represents a four-fold increase since 2012. No other service is used by more than $10 \%$ of 511 Traveler Information System users.
- Drivers are most likely to use the 511 Traveler Information System in the same ways as in the past, but the order has shifted since 2012. Now, $37 \%$ are likely to use the system before they leave for their destination ( $21 \%$ in 2012), $30 \%$ while stopped in traffic approaching congestion ( $37 \%$ in 2012), and $29 \%$ while on their way to their destination ( $55 \%$ in 2012).
- Most drivers $(71 \%)$ continue to change their route based on the information they received from the 511 Traveler Information System. Some have changed their mode of travel ( $20 \%$ in 2014; $7 \%$ in 2012) or their estimated time of arrival ( $22 \%$ in $2014 ; 14 \%$ in 2012). Those who changed their stress levels ( $16 \%$ ) or their departure time ( $15 \%$ ) did so at similar levels in 2012.


## ITS Services: Electronic Message Signs

- Most District 5 drivers ( $83 \%$ ) read electronic message signs at least once per week, a percentage that is down slightly from $94 \%$ in 2012. Nearly all users continue to believe the signs are accurate ( $97 \%$ ), useful ( $93 \%$ ), and easy to read ( $92 \%$ ). As in 2012 , $82 \%$ are likely to change their route based on information they see posted.


## ITS Services: Road Rangers

- After an increase in 2012, awareness of the Road Rangers has decreased slightly, with $72 \%$ of drivers knowing about this service. Continuing a downward trend since 2010, 7\% have top-of-mind awareness of how to contact a Road Ranger. However, when prompted with a reminder about *FHP $/ * 347,61 \%$ of other drivers say they know to call that number to request assistance. Among drivers who say they do not know how to contact a Road Ranger, $68 \%$ say they have heard of *FHP/*347 (up from $44 \%$ in 2012).
- Now at $23 \%$, the number of District 5 drivers who have been assisted by a Road Ranger has shown its first increase since 2006. A strong majority ( $87 \%$ ) of those who have been assisted say that the Road Ranger was "very helpful," which is up somewhat from 2012. Nearly all drivers ( $93 \%$ ) who know about Road Rangers, even those who have not had direct experience with them, continue to believe this service is at least "somewhat useful."
- When asked what types of additional information they would like FDOT to provide, drivers continue to say they would like information about alternate routes to help them avoid traffic incidents. That sentiment was even stronger in 2014, with $78 \%$ expressing this desire compared to $64 \%$ in 2012.

|  | Do you live in Florida year-round, or for only part of the year? <br> Year-round <br> Only part of the year | Total |  |
| :--- | :---: | :---: | :---: |
| Total | $99 \%$ | $1 \%$ | $100 \%$ |
| Gender | $99 \%$ |  |  |
| Male | $99 \%$ | $1 \%$ | $100 \%$ |
| Female |  |  | $100 \%$ |
| Age | $100 \%$ | $0 \%$ |  |
| 18 to 29 | $100 \%$ | $0 \%$ | $100 \%$ |
| 3 to 39 | $100 \%$ | $0 \%$ | $100 \%$ |
| 40 to 49 | $97 \%$ | $3 \%$ | $100 \%$ |
| 50 to 59 | $98 \%$ | $2 \%$ | $100 \%$ |
| Over 60 |  | $1 \%$ | $100 \%$ |
| Rush hour driver | $99 \%$ | $1 \%$ | $100 \%$ |
| Yes | $99 \%$ |  | $100 \%$ |
| No |  |  |  |


|  | Typically driving on Florida freeways during: The morning rush, 6 a.m. to 9 a.m. |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
|  | Yes | No | Don't know/Refused | Total |
| Total | 53\% | 46\% | 0\% | 100\% |
| Gender |  |  |  |  |
| Male | 55\% | 45\% | 0\% | 100\% |
| Female | 52\% | 48\% | 0\% | 100\% |
| Age |  |  |  |  |
| 18 to 29 | 72\% | 28\% | 0\% | 100\% |
| 30 to 39 | 57\% | 43\% | 0\% | 100\% |
| 40 to 49 | 56\% | 44\% | 0\% | 100\% |
| 50 to 59 | 69\% | 31\% | 0\% | 100\% |
| Over 60 | 26\% | 73\% | 1\% | 100\% |
| Rush hour driver |  |  |  |  |
| Yes | 75\% | 25\% | 0\% | 100\% |
| No | 0\% | 99\% | 1\% | 100\% |


|  | 亚y driving on Florida freeways during: The day, |  |  | Total |
| :---: | :---: | :---: | :---: | :---: |
|  | Yes | No | Don't know/Refused |  |
| Total | 63\% | 37\% | 0\% | 100\% |
| Gender |  |  |  |  |
| Male | 65\% | 35\% | 0\% | 100\% |
| Female | 61\% | 38\% | 1\% | 100\% |
| Age |  |  |  |  |
| 18 to 29 | 53\% | 47\% | 0\% | 100\% |
| 30 to 39 | 67\% | 30\% | 3\% | 100\% |
| 40 to 49 | 60\% | 40\% | 0\% | 100\% |
| 50 to 59 | 58\% | 42\% | 0\% | 100\% |
| Over 60 | 72\% | 28\% | 0\% | 100\% |
| Rush hour driver |  |  |  |  |
| Yes | 57\% | 42\% | 1\% | 100\% |
| No | 76\% | 24\% | 0\% | 100\% |

Total
Gender
Male
Female
Age
18 to 29
30 to 39
40 to 49
50 to 59
Over 60
Rush hour drive
Yes
No

| Typically <br> driving on Florida freeways during: <br> Yos <br>  <br> No | The evening rush, $\mathbf{4}$ p.m. to $\mathbf{~} \mathbf{p}$ p.m. <br> Total |  |
| :---: | :---: | :---: |
| $64 \%$ | $36 \%$ | $100 \%$ |
|  |  |  |
| $61 \%$ | $39 \%$ | $100 \%$ |
| $67 \%$ | $33 \%$ | $100 \%$ |
| $71 \%$ | $29 \%$ | $100 \%$ |
| $75 \%$ | $25 \%$ | $100 \%$ |
| $72 \%$ | $28 \%$ | $100 \%$ |
| $74 \%$ | $26 \%$ | $100 \%$ |
| $42 \%$ | $58 \%$ | $100 \%$ |
|  |  |  |
| $89 \%$ | $11 \%$ | $100 \%$ |
| $0 \%$ | $100 \%$ | $100 \%$ |


| Typically driving on Florida freeways during: The evening after 7 p.m. <br> Yes <br> Non't know/Refused | Total |  |  |
| :---: | :---: | :---: | :---: |
| $38 \%$ | $62 \%$ | $0 \%$ | $100 \%$ |
| $41 \%$ | $59 \%$ | $0 \%$ | $100 \%$ |
| $36 \%$ | $64 \%$ | $0 \%$ | $100 \%$ |
|  |  |  |  |
| $41 \%$ | $59 \%$ | $0 \%$ | $100 \%$ |
| $39 \%$ | $61 \%$ | $0 \%$ | $100 \%$ |
| $39 \%$ | $61 \%$ | $0 \%$ | $100 \%$ |
| $36 \%$ | $63 \%$ | $1 \%$ | $100 \%$ |
| $38 \%$ |  | $0 \%$ | $100 \%$ |
| $42 \%$ |  |  |  |
| $28 \%$ | $72 \%$ | $0 \%$ | $100 \%$ |
|  |  |  |  |
|  |  |  | $100 \%$ |


| How often do you listen to radio traffic reports? |  |  |  | Never | Don't know/Refused | Total |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Once per week | 2-3 times per week | More than 3 times per |  |  |  |
| Total | 10\% | 15\% | 30\% | 44\% | 0\% | 100\% |
| Gender |  |  |  |  |  |  |
| Male | 9\% | 9\% | 30\% | 51\% | 1\% | 100\% |
| Female | 11\% | 21\% | 31\% | 37\% | 0\% | 100\% |
| Age |  |  |  |  |  |  |
| 18 to 29 | 12\% | 15\% | 28\% | 45\% | 0\% | 100\% |
| 30 to 39 | 13\% | 15\% | 30\% | 43\% | 0\% | 100\% |
| 40 to 49 | 9\% | 28\% | 25\% | 38\% | 0\% | 100\% |
| 50 to 59 | 8\% | 7\% | 37\% | 48\% | 0\% | 100\% |
| Over 60 | 10\% | 13\% | 31\% | 44\% | 2\% | 100\% |
| Rush hour driver |  |  |  |  |  |  |
| Yes | 11\% | 14\% | 34\% | 41\% | 0\% | 100\% |
| No | 7\% | 19\% | 22\% | 50\% | 1\% | 100\% |
|  | Do you find radio traffic reports... |  |  |  |  |  |
|  | Very useful | Somewhat useful | Not very useful at all | Don't know/Refused | Total |  |
| Total | 41\% | 46\% | 12\% | 1\% | 100\% |  |
| Gender |  |  |  |  |  |  |
| Male | 43\% | 46\% | 10\% | 2\% | 100\% |  |
| Female | 39\% | 47\% | 13\% | 1\% | 100\% |  |
| Age |  |  |  |  |  |  |
| 18 to 29 | 43\% | 43\% | 14\% | 0\% | 100\% |  |
| 30 to 39 | 47\% | 41\% | 11\% | 0\% | 100\% |  |
| 40 to 49 | 26\% | 67\% | 7\% | 0\% | 100\% |  |
| 50 to 59 | 45\% | 50\% | 5\% | 0\% | 100\% |  |
| Over 60 | 41\% | 37\% | 17\% | 4\% | 100\% |  |
| Rush hour driver |  |  |  |  |  |  |
| Yes | 41\% | 48\% | 11\% | 0\% | 100\% |  |
| No | 39\% | 42\% | 15\% | 4\% | 100\% |  |
|  | How often do you tune in to traffic reports on television? |  |  |  |  |  |
|  | Once per week | 2-3 times per week | More than 3 times per | Never | Don't know/Refused | Total |
| Total | 8\% | 12\% | 26\% | 53\% | 0\% | 100\% |
| Gender |  |  |  |  |  |  |
| Male | 9\% | 11\% | 20\% | 60\% | 1\% | 100\% |
| Female | 8\% | 14\% | 31\% | 47\% | 0\% | 100\% |
| Age |  |  |  |  |  |  |
| 18 to 29 | 8\% | 8\% | 15\% | 69\% | 0\% | 100\% |
| 30 to 39 | 3\% | 12\% | 24\% | 61\% | 0\% | 100\% |
| 40 to 49 | 9\% | 21\% | 27\% | 42\% | 0\% | 100\% |
| 50 to 59 | 14\% | 11\% | 29\% | 45\% | 3\% | 100\% |
| Over 60 | 7\% | 10\% | 33\% | 50\% | 0\% | 100\% |
| Rush hour driver |  |  |  |  |  |  |
| Yes | 8\% | 12\% | 25\% | 55\% | 0\% | 100\% |
| No | 8\% | 14\% | 27\% | 50\% | 1\% | 100\% |







|  | How have you used the info you receive from 511: Changed your route |  |  |
| :---: | :---: | :---: | :---: |
|  | Yes | No | Total |
| Total | 71\% | 29\% | 100\% |
| Gender |  |  |  |
| Male | 67\% | 33\% | 100\% |
| Female | 76\% | 24\% | 100\% |
| Age |  |  |  |
| 30 to 39 | 80\% | 20\% | 100\% |
| 40 to 49 | 66\% | 34\% | 100\% |
| 50 to 59 | 63\% | 37\% | 100\% |
| Over 60 | 80\% | 20\% | 100\% |
| Rush hour driver |  |  |  |
| Yes | 74\% | 26\% | 100\% |
| No | 61\% | 39\% | 100\% |
|  | How have you used the info you receive from 511: Changed departure time |  |  |
|  | Yes | No | Total |
| Total | 15\% | 85\% | 100\% |
| Gender |  |  |  |
| Male | 16\% | 84\% | 100\% |
| Female | 14\% | 86\% | 100\% |
| Age |  |  |  |
| 30 to 39 | 29\% | 71\% | 100\% |
| 40 to 49 | 0\% | 100\% | 100\% |
| 50 to 59 | 6\% | 94\% | 100\% |
| Over 60 | 7\% | 93\% | 100\% |
| Rush hour driver |  |  |  |
| Yes | 17\% | 83\% | 100\% |
| No | 11\% | 89\% | 100\% |
|  | How have you used the info you receive from 511: Changed est. time of arrival |  |  |
|  | Yes | No | Total |
| Total | 22\% | 78\% | 100\% |
| Gender |  |  |  |
| Male | 24\% | 76\% | 100\% |
| Female | 20\% | 80\% | 100\% |
| Age |  |  |  |
| 30 to 39 | 31\% | 69\% | 100\% |
| 40 to 49 | 16\% | 84\% | 100\% |
| 50 to 59 | 19\% | 81\% | 100\% |
| Over 60 | 20\% | 80\% | 100\% |
| Rush hour driver |  |  |  |
| Yes | 16\% | 84\% | 100\% |
| No | 42\% | 58\% | 100\% |
|  | How have you used the info you receive from 511: Changed your stress level |  |  |
|  | Yes | No | Total |
| Total | 16\% | 84\% | 100\% |
| Gender |  |  |  |
| Male | 12\% | 88\% | 100\% |
| Female | 21\% | 79\% | 100\% |
| Age |  |  |  |
| 30 to 39 | 29\% | 71\% | 100\% |
| 40 to 49 | 0\% | 100\% | 100\% |
| 50 to 59 | 12\% | 88\% | 100\% |
| Over 60 | 13\% | 87\% | 100\% |
| Rush hour driver |  |  |  |
| Yes | 20\% | 80\% | 100\% |
| No | 0\% | 100\% | 100\% |






| Have you ever heard of *FHP or *347? |  |  |  |
| :---: | :---: | :---: | :---: |
|  | Yes | No | Total |
| Total | 68\% | 32\% | 100\% |
| Gender |  |  |  |
| Male | 75\% | 25\% | 100\% |
| Female | 61\% | 39\% | 100\% |
| Age |  |  |  |
| 18 to 29 | 100\% | 0\% | 100\% |
| 30 to 39 | 56\% | 44\% | 100\% |
| 40 to 49 | 61\% | 39\% | 100\% |
| 50 to 59 | 77\% | 23\% | 100\% |
| Over 60 | 60\% | 40\% | 100\% |
| Rush hour driver |  |  |  |
| Yes | 71\% | 29\% | 100\% |
| No | 62\% | 38\% | 100\% |

$\left.\begin{array}{lcccccc} & \begin{array}{c}\text { How useful do you think the } \\ \text { Very useful }\end{array} & \begin{array}{c}\text { Road Rangers are? } \\ \text { Somewhat useful }\end{array} & \text { Not very useful at all } & \text { Don't know/Refused }\end{array}\right]$ Total


| Age |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | 18 to 29 | 30 to 39 | 40 to 49 | 50 to 59 | Over 60 | Don't know/Refused | Total |
| Total | 21\% | 16\% | 18\% | 17\% | 25\% | 2\% | 100\% |
| Gender |  |  |  |  |  |  |  |
| Male | 19\% | 16\% | 16\% | 19\% | 28\% | 2\% | 100\% |
| Female | 24\% | 16\% | 19\% | 16\% | 23\% | 2\% | 100\% |
| Rush hour driver |  |  |  |  |  |  |  |
| Yes | 25\% | 18\% | 19\% | 20\% | 17\% | 0\% | 100\% |
| No | 12\% | 10\% | 15\% | 10\% | 47\% | 6\% | 100\% |
| Gender |  |  |  |  |  |  |  |
|  | Male | Female | Total |  |  |  |  |
| Total | 49\% | 51\% | 100\% |  |  |  |  |
| Age |  |  |  |  |  |  |  |
| 18 to 29 | 43\% | 57\% | 100\% |  |  |  |  |
| 30 to 39 | 48\% | 52\% | 100\% |  |  |  |  |
| 40 to 49 | 45\% | 55\% | 100\% |  |  |  |  |
| 50 to 59 | 53\% | 47\% | 100\% |  |  |  |  |
| Over 60 | 53\% | 47\% | 100\% |  |  |  |  |
| Rush hour driver |  |  |  |  |  |  |  |
| Yes | 48\% | 52\% | 100\% |  |  |  |  |
| No | 51\% | 49\% | 100\% |  |  |  |  |

