



TO: Florida Department of Transportation
FROM: The Schapiro Group, Inc.
DATE: August 19, 2014
RE: Customer Satisfaction Tracking Study — District 7 Results

The Schapiro Group (TSG) interviewed 300 Florida freeway drivers across District 7 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 Hillsborough, Pasco, and Pinellas 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 7 include:

Driving Patterns and Traffic Information Services

- The number of drivers on District 7 freeways during the day is similar to 2012, with slightly fewer during the morning rush hour, evening rush period, and the evening.
- Roughly half of drivers still use traditional traffic information sources such as radio and television, and an overwhelming majority of those who get traffic information from those sources sees them as at least “somewhat useful.”
- Drivers still use several different sources for their traffic information, but their patterns have changed over the past two years. Electronic message signs are still the most popular information source, but their usage dropped from 73% in 2012 to 50% this year. Just under half (46%) use in-car navigation systems, 34% use mobile apps, and 31% use websites on their computers or cell phones. Usage of each of these last three sources increased in 2014.
- Among drivers who use websites for traffic information, the top site is now Google (24% in 2014; 20% in 2012). Local TV and radio station websites are now second in popularity (15% in 2014; 25% in 2012). Over half (56%) 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 (40%) is the leader, by far, with local radio and television websites a distant second at 7%. Roughly four in ten (42%) drivers indicate some other site or that 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, half (51%) of drivers continue to say that they would be unlikely to use it.
- Awareness of the 511 Traveler Information System decreased slightly to 29%. Usage, however, has remained the same. District 7 drivers are most likely to find out about 511 through signs on the freeway or television.
- Starting in 2012, respondents who use the 511 Traveler Information System are now asked which services they use. The most popular, by far, continues to be the call-in service (51%), though usage is down from 2012. Personalized services are used by 16% of drivers, while 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 on their way to their destination (41%), while stopped in traffic approaching congestion (34%), or before they leave for their destination (28%). These patterns are similar to those seen in 2012.
- Most drivers (60%) changed their route based on the information they received from the 511 Traveler Information System. Some have changed their departure time (32%), their stress levels (24%), their estimated time of arrival (24%), or their mode of travel (16%). These usage levels are similar to those reported in 2012, with the exception of changed stress levels (increased in 2014).

ITS Services: Electronic Message Signs

- A solid majority of District 7 drivers (80%) continues to read electronic message signs at least once per week. Most users continue to believe the signs are accurate (95%), useful (92%), and easy to read (91%), and 75% are still likely to change their route based on information they see posted.

ITS Services: Road Rangers

- After slight increases over the years, awareness of the Road Rangers has decreased slightly, with 55% of current drivers knowing about this service. Only 6% of District 7 drivers have top-of-mind awareness of how to contact a Road Ranger, down from 28% in 2012. When prompted with a reminder about *FHP/*347, a majority (64%) of other drivers continues to say they know to call that number to request assistance. Among drivers who say they do not know how to contact a Road Ranger, roughly two-thirds continue to say they have heard of *FHP.
- The number of District 7 drivers who have been assisted by a Road Ranger increased from 17% in 2012 to 29% in 2014. Of those who have been assisted, virtually all (95%) describe the Road Ranger as “very helpful.” Nearly all drivers (89%) who know about Road Rangers, even those who have not had direct experience with them, continue to believe this service to be at least “somewhat useful.”

- When asked what types of additional information they would like FDOT to provide, more than half of drivers (72%) continue to say they would like information about alternate routes to help them avoid traffic incidents.