

VISION 2032

Mapping Nebraska's Future



Stakeholder Survey

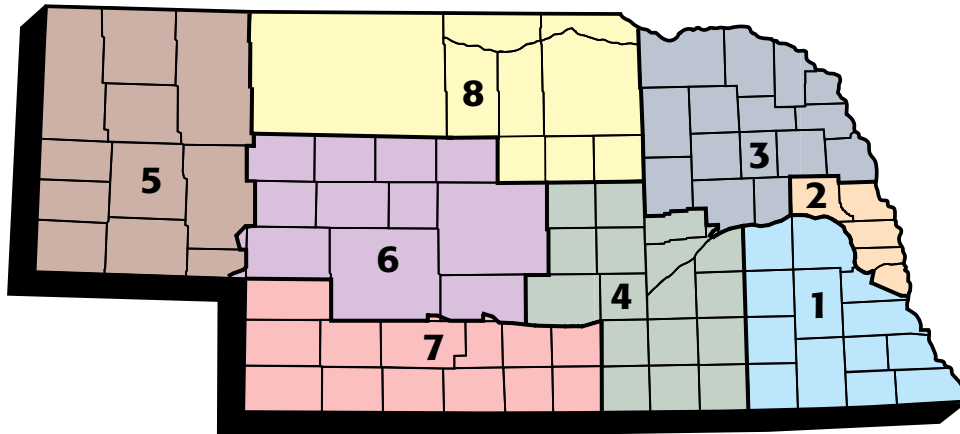
*Differences by Respondent Type
and Industry*

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Nebraska Department of Roads Districts



Respondents

The Long Range Transportation Plan: Vision 2032 stakeholder survey enjoyed excellent response from private citizens as well as from business and government representatives. Rural districts comprise 37% of Nebraska's population, yet 52% of survey respondents are from rural districts, resulting in overall findings with somewhat of a rural slant.

Introduction

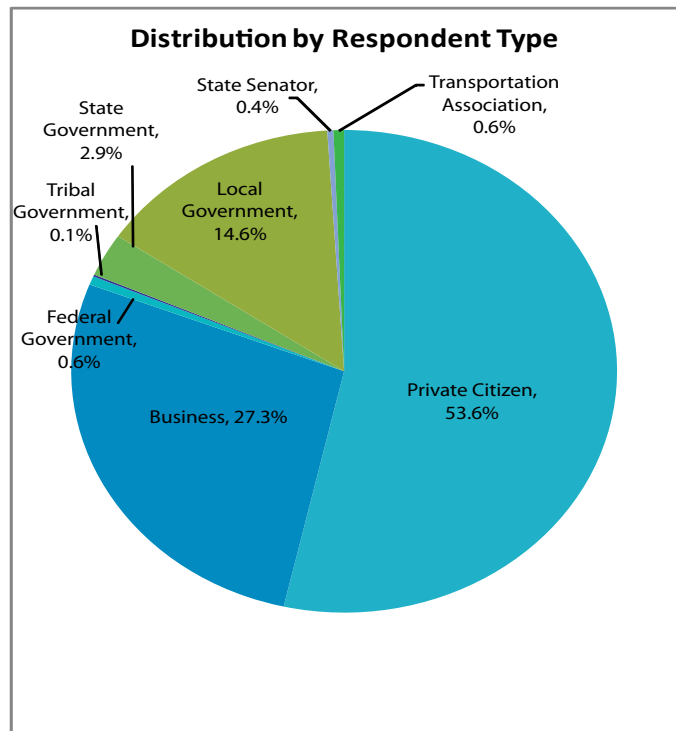
These survey results are important to the Long Range Transportation Plan: Vision 2032 as we consider the views of our stakeholders in development of the plan. The survey reveals that respondents feel strongly that transportation is an important community issue. The highest rated issues from this survey are to “Keep existing highways in a state of good repair,” and “Increased maintenance of existing roads and bridges”. These findings support the current NDOR goal to “maintain and preserve the transportation system” that continues to be important into the future.

Private citizens may have obtained a survey from a transportation agency or may have become aware of the survey through news releases, radio and television announcements and responded on the internet. A sample of 7,867 business, government, Tribal Government and Transportation Associations received a survey through the mail. The under served and transportationally disadvantaged were reached through placement of surveys on buses and placards in libraries. Business, non-profit organizations or government agencies working with this population were included in the survey mailing. Survey respondents were asked to identify themselves by selecting predetermined categories. This report displays survey results for the respondent types and reports significant differences found in the total importance or total priority ratings when compared to the overall response.

Business and government respondents were asked to complete additional questions regarding strategies for the movement of freight. These responses are reported by industry. Significant differences of industry responses to the overall response have been identified.

The 70 respondents who did not identify their respondent type and the 33 business respondents who did not identify an industry are included in the “All Respondents” and “All Industries” category, but are not reported as a breakout category.

Distribution by Respondent Type	
Respondent Type	Number of Respondents
Private Citizen	2,219
Business	1,131
Local Government	603
State Government	120
Federal Government	24
State Senator	15
Tribal Government	5
Transportation Association	26
Total	4,143



Private citizen’s comprise over half (53.6%) of the survey respondents, with over a quarter (27.3%) from the business community and just under a fifth (18.5%) from government respondents. Respondents from transportation associations make up the remaining 0.6% of the sample.

Importance of Transportation as a Community Issue

Stakeholders Rate Importance of Transportation as a Community Issue						
Respondent Type	Number of Respondents	Not at all Important	Not Very Important	Somewhat Important	Very Important	Total % Important (Somewhat Important + Very Important)
Private Citizen	2,187	1%	3%	24%	73%	97%*
Business	1,114	1%	4%	23%	72%	96%
Federal Government	24	0%	0%	8%	92%	100%*
Local Government	593	1%	4%	17%	78%	95%
State Government	117	1%	1%	24%	74%	98%
State Senator	14	0%	7%	21%	71%	93%
Transportation Association	26	4%	0%	8%	88%	96%
Tribal Government	5	0%	0%	20%	80%	100%*
All Respondents	4,145	1%	3%	23%	74%	96%

*Respondent Type with a significant difference from the all respondent total % important.

Transportation as a community issue is rated quite highly, with 96% of respondents rating it either somewhat important (23%) or very important (74%). The total importance rating (somewhat + very important) for private citizens is significantly higher than the overall at 97%, with federal government and tribal government both giving a 100% important rating.

Stakeholders Prioritize Transportation Issues

Stakeholders Prioritize Direct Airline Connections From Your Area						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,076	13%	41%	33%	13%	46%
Private Citizen	2,139	17%	39%	28%	16%	44%
Federal Government	21	10%	33%	38%	19%	57%
State Government	118	14%	43%	31%	13%	43%
State Senator	15	20%	53%	13%	13%	27%
Local Government	543	19%	52%	24%	5%	29%*
Transportation Association	25	23%	41%	14%	36%	50%
Tribal Government	4	25%	25%	50%	0%	50%
All Respondents	4,000	16%	41%	29%	14%	43%

*Respondent Type with a significant difference from the all respondent total % priority

Over four out of ten (43%) respondents feel that “direct airline connections from your area” are a priority, with three out of ten (29%) local government respondents rating this issue as a priority for them.

Stakeholders Prioritize Less Traffic Congestion in Your Area						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,095	19%	49%	25%	7%	32%*
Private Citizen	2,166	13%	37%	31%	19%	50%*
Federal Government	22	23%	36%	27%	14%	41%
State Government	117	16%	36%	36%	12%	48%
State Senator	15	27%	60%	7%	7%	13%
Local Government	568	22%	50%	20%	9%	28%*
Transportation Association	25	12%	32%	32%	24%	56%
Tribal Government	4	0%	25%	50%	25%	75%
All Respondents	4,072	16%	42%	28%	14%	43%
*Respondent Type with a significant difference from the all respondent total % priority						

Four out of ten (43%) respondents overall rate “less traffic congestion in your area” as a priority. Private citizens rate the issue significantly higher than the overall, with half (50%) rating this issue as a priority, while only a third (32%) of business and a quarter (28%) of local government respondents rate the issue as a priority.

Stakeholders Prioritize Bus Service Between Nebraska Cities						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,093	20%	55%	21%	4%	25%*
Private Citizen	2,153	17%	41%	31%	11%	42%*
Federal Government	22	14%	50%	23%	14%	36%
State Government	117	17%	41%	27%	15%	42%
State Senator	15	13%	60%	27%	0%	27%
Local Government	555	17%	55%	25%	3%	28%*
Transportation Association	26	12%	50%	12%	27%	38%
Tribal Government	4	0%	75%	25%	0%	25%
All Respondents	4,045	17%	47%	27%	9%	35%
*Respondent Type with a significant difference from the all respondent total % priority						

Four out of ten (42%) private citizens rate “bus service between Nebraska cities” as a priority compared to 35% of all respondents. Only a quarter (25%) of business respondents and under three out of ten (28%) local government respondents rate the issue as a priority.

Stakeholders Prioritize Pollution Caused by Automobiles and Trucks						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,106	9%	55%	30%	6%	36%*
Private Citizen	2,170	8%	39%	37%	17%	54%*
Federal Government	23	4%	48%	35%	13%	48%
State Government	116	7%	38%	49%	6%	55%
State Senator	15	13%	53%	20%	13%	33%
Local Government	574	9%	60%	27%	4%	31%*
Transportation Association	26	4%	62%	23%	12%	35%
Tribal Government	4	25%	75%	0%	0%	0%*
All Respondents	4,094	8%	46%	34%	12%	46%
*Respondent Type with a significant difference from the all respondent total % priority						

“Pollution caused by automobiles and trucks” has a 46% priority rating overall, with over half (54%) of private citizens seeing this issue as a priority. Business (36%), local government (31%), and tribal government (0%) respondents gave the issue a priority rating significantly lower than the overall.

Stakeholders Prioritize Travel between Cities in Nebraska Without a Car						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,075	17%	54%	23%	7%	30%*
Private Citizen	2,164	13%	36%	29%	22%	51%*
Federal Government	21	14%	48%	19%	19%	38%
State Government	119	17%	38%	29%	16%	45%
State Senator	15	13%	67%	20%	0%	20%*
Local Government	561	13%	55%	26%	5%	31%*
Transportation Association	25	28%	20%	40%	12%	52%
Tribal Government	4	0%	50%	50%	0%	50%
All Respondents	4,044	14%	44%	27%	15%	42%
*Respondent Type with a significant difference from the all respondent total % priority						

Over half (51%) of private citizens rated “travel between cities in Nebraska without a car” as a priority, compared to four out of ten (42%) overall. Respondent types that gave a significantly lower priority rating include local government (31%), business (30%) and state senators (20%).

Stakeholders Prioritize Less Traffic Congestion on State and Interstate Highways						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,111	5%	33%	49%	12%	62%
Private Citizen	2,184	6%	32%	41%	22%	63%
Federal Government	23	0%	43%	43%	13%	57%
State Government	119	8%	28%	50%	15%	65%
State Senator	15	0%	20%	60%	20%	80%
Local Government	584	5%	35%	47%	13%	60%
Transportation Association	25	4%	28%	40%	28%	68%
Tribal Government	5	0%	0%	80%	20%	100%*
All Respondents	4,124	5%	33%	44%	18%	62%
*Respondent Type with a significant difference from the all respondent total % priority						

“Traffic congestion on state and interstate highways” is a priority to over six out of ten (62%) of respondents and 100% of tribal government respondents.

Stakeholders Prioritize Convenient Connections for Moving People Between Cars, Buses, Trains and Airplanes						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,071	16%	47%	31%	6%	37%*
Private Citizen	2,135	9%	34%	38%	19%	57%*
Federal Government	22	9%	64%	18%	9%	27%*
State Government	118	14%	38%	41%	8%	48%
State Senator	14	36%	21%	29%	14%	43%
Local Government	550	16%	50%	30%	4%	34%*
Transportation Association	26	15%	12%	38%	35%	73%*
Tribal Government	4	25%	25%	50%	0%	50%
All Respondents	3,998	12%	40%	35%	13%	48%
*Respondent Type with a significant difference from the all respondent total % priority						

Almost half (48%) of all respondents rate “convenient connections for moving people between cars, buses, trains and airplanes” as a priority. Almost three fourths (73%) of transportation association respondents and over half (57%) of private citizens rate this issue as a priority. Business (37%), local government (34%), and federal government (27%) respondents view this issue as less of a priority than respondents overall.

Stakeholders Prioritize Impact of Transportation Projects on the Natural Environment						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,099	9%	45%	37%	8%	45%*
Private Citizen	2,150	8%	28%	39%	25%	64%*
Federal Government	23	0%	30%	43%	26%	70%
State Government	118	7%	34%	41%	19%	59%
State Senator	15	13%	27%	47%	13%	60%
Local Government	573	11%	46%	36%	7%	43%*
Transportation Association	26	8%	23%	54%	15%	69%
Tribal Government	3	33%	67%	0%	0%	0%*
All Respondents	4,067	9%	35%	38%	17%	56%
*Respondent Type with a significant difference from the all respondent total % priority						

More than six out of ten (64%) private citizens rate the “impact of transportation projects on the natural environment” as a priority, compared to over five out of ten (56%) overall. Business and local government respondents, with 45% and 43% respectively, rated the issue as less of a priority than respondents overall.

Stakeholders Prioritize the Visual Appearance of State and Interstate Highways						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,110	4%	36%	52%	8%	60%
Private Citizen	2,175	7%	35%	45%	13%	58%
Federal Government	22	0%	23%	64%	14%	77%*
State Government	119	6%	30%	48%	16%	64%
State Senator	15	7%	27%	53%	13%	67%
Local Government	588	4%	37%	53%	6%	59%
Transportation Association	26	8%	23%	46%	23%	69%
Tribal Government	5	0%	40%	60%	0%	60%
All Respondents	4,118	5%	35%	48%	11%	59%
*Respondent Type with a significant difference from the all respondent total % priority						

Six out of ten (59%) respondents rate the “visual appearance of state and interstate highways” as a priority, compared to almost eight out of ten (77%) federal government respondents.

Stakeholders Prioritize Equal Access to Transportation Options						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,064	13%	46%	32%	9%	41%*
Private Citizen	2,149	7%	30%	41%	21%	62%*
Federal Government	22	0%	36%	50%	14%	64%
State Government	118	9%	38%	36%	17%	53%
State Senator	15	7%	40%	33%	20%	53%
Local Government	548	11%	46%	37%	6%	43%*
Transportation Association	26	15%	35%	27%	23%	50%
Tribal Government	5	0%	60%	40%	0%	40%
All Respondents	4,007	9%	37%	38%	16%	53%
*Respondent Type with a significant difference from the all respondent total % priority						

“Equal Access to transportation options” has a priority rating from over half (53%) of respondents overall, with six out of ten (62%) of private citizens rating the issue as a priority. Respondent types rating the issue as a lower priority than the overall include local government (43%) and business (41%) respondents.

Stakeholders Prioritize Transportation Options for the Elderly or Disabled						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,090	2%	30%	56%	12%	68%*
Private Citizen	2,155	4%	23%	47%	26%	73%
Federal Government	23	0%	26%	43%	30%	74%
State Government	117	3%	22%	52%	22%	74%
State Senator	15	0%	7%	73%	20%	93%*
Local Government	584	1%	28%	58%	14%	71%
Transportation Association	26	4%	12%	50%	35%	85%
Tribal Government	5	0%	60%	20%	20%	40%
All Respondents	4,071	3%	25%	51%	21%	72%
*Respondent Type with a significant difference from the all respondent total % priority						

At 72% overall, “transportation options for the elderly or disabled” has the second highest overall priority rating of all the transportation options on the survey. State senators rate this issue as an even higher priority at 93%, with business respondents rating it as less of a priority than overall, at 68%.

Stakeholders Prioritize Keep Existing Highways in a State of Good Repair						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,119	0%	2%	38%	60%	98%
Private Citizen	2,186	1%	3%	33%	64%	96%
Federal Government	23	0%	0%	43%	57%	100%*
State Government	119	1%	2%	24%	74%	97%
State Senator	14	7%	0%	14%	79%	93%
Local Government	598	0%	2%	37%	61%	98%
Transportation Association	26	4%	8%	35%	54%	88%
Tribal Government	5	0%	0%	0%	100%	100%*
All Respondents	4,150	1%	3%	34%	63%	97%
*Respondent Type with a significant difference from the all respondent total % priority						

At 97% priority overall, the transportation issue to “keep existing highways in a state of good repair” has the highest priority rating of all issues in the survey. Federal government and tribal government respondents both rated this issue as 100% priority.

Stakeholders Prioritize Getting to Work, a Doctor's Appointment or Running Errands Without a Car						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,084	9%	48%	33%	10%	43%*
Private Citizen	2,177	10%	30%	31%	29%	60%*
Federal Government	21	5%	33%	43%	19%	62%
State Government	117	9%	33%	35%	22%	57%
State Senator	15	13%	47%	40%	0%	40%
Local Government	572	6%	45%	37%	12%	49%*
Transportation Association	24	8%	25%	29%	38%	67%
Tribal Government	4	0%	50%	50%	0%	50%
All Respondents	4,075	9%	37%	32%	21%	54%
*Respondent Type with a significant difference from the all respondent total % priority						

Over five out of ten (54%) respondents rate “getting to work, a doctor’s appointment or running errands without a car” as a priority. Private citizens gave this issue a significantly higher priority rating of six out of ten (60%). Local government respondents rate this transportation issue significantly lower than the overall at 49%, with only 43% of business respondents rating the issue as a priority.

Stakeholders Prioritize Safe Bike and Pedestrian Routes/Trails in Your Community						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,110	16%	43%	31%	9%	41%*
Private Citizen	2,182	10%	26%	30%	35%	65%*
Federal Government	24	13%	21%	33%	33%	67%
State Government	119	8%	28%	39%	26%	65%
State Senator	15	20%	47%	20%	13%	33%
Local Government	586	19%	45%	29%	8%	36%*
Transportation Association	25	12%	28%	16%	44%	60%
Tribal Government	5	0%	40%	60%	0%	60%
All Respondents	4,128	13%	33%	30%	24%	54%
*Respondent Type with a significant difference from the all respondent total % priority						

Over half (54%) of respondents rate “safe bike and pedestrian routes/trails in your community” as a priority. Private citizens rate this issue significantly higher, at 65% priority, while business and local governments rate the issue significantly lower, at 41% and 36% respectively.

Stakeholders Prioritize Passenger Train Service Between Cities						
Respondent Type	Number of Respondents	Not at all a Priority	Low Priority	High Priority	Critical Priority	Total % Priority (High + Critical)
Business	1,066	29%	50%	16%	5%	22%*
Private Citizen	2,140	21%	39%	24%	17%	41%*
Federal Government	22	18%	41%	14%	27%	41%
State Government	117	25%	44%	23%	8%	31%
State Senator	15	27%	47%	13%	13%	27%
Local Government	545	30%	53%	14%	3%	17%*
Transportation Association	25	24%	40%	16%	20%	36%
Tribal Government	4	25%	75%	0%	0%	0%*
All Respondents	3,993	24%	44%	20%	12%	32%
*Respondent Type with a significant difference from the all respondent total % priority						

Just under a third (32%) of respondents overall rate “passenger train service between cities” as a priority, with private citizens rating the issue significantly higher, at 41% priority. Local government respondents rate the issue significantly lower than overall, at 17% priority, with tribal government respondents giving the lowest priority rating of 0%.

Stakeholders Choose Options

Stakeholders Choose Options			
Respondent Type	Number of Respondents	Reducing the amount of time the project Inconveniences drivers	Reducing the cost of a highway project
Business	1,006	32%*	68%*
Private Citizen	2,011	44%*	56%*
Federal Government	22	36%	64%
State Government	109	35%	65%
State Senator	13	15%	85%
Local Government	533	21%*	79%*
Transportation Association	24	29%	71%
Tribal Government	4	25%	75%
All Respondents	3,747	37%	63%
*Respondent Type with a significant difference from all respondents			

Stakeholders selected which option they would choose between important goals. Overall respondents are more in favor of reducing the cost of a highway project (63%) than reducing the amount of time the project inconveniences drivers (37%). At 56%, private citizens are less inclined than the overall to select reducing the cost of a highway project, while business and local government are more inclined to choose this option, at 68% and 79% respectively.

Stakeholders Choose Options			
Respondent Type	Number of Respondents	Repaving a Rough highway	Widening a Congested highway
Business	1,073	68%	32%
Private Citizen	2,109	65%*	35%*
Federal Government	23	70%	30%
State Government	117	75%	25%
State Senator	15	87%*	13%*
Local Government	574	76%*	24%*
Transportation Association	26	65%	35%
Tribal Government	5	60%	40%
All Respondents	3,973	68%	32%
*Respondent Type with a significant difference from all respondents			

Overall, two thirds (68%) of respondents favor repaving a rough highway over widening a congested highway. A higher percent of state senators and local government respondents agree, with 87% and 76% respectively. Just under two thirds (65%) of private citizens favor repaving a rough highway, with 35% favoring widening a congested highway.

Stakeholders Choose Options			
Respondent Type	Number of Respondents	Building a road to encourage economic development	Widening a congested highway
Business	1,024	44%	56%
Private Citizen	2,036	39%	61%
Federal Government	22	32%	68%
State Government	116	31%*	69%*
State Senator	15	80%*	20%*
Local Government	550	44%	56%
Transportation Association	25	44%	56%
Tribal Government	3	0%*	100%*
All Respondents	3,817	41%	59%
*Respondent Type with a significant difference from all respondents			

Six out of ten (59%) respondents would choose widening a congested highway over building a road to encourage economic development. Significant differences include 100% of tribal government respondents, and 69% of state government respondents also choosing widening a congested highway. Eight out of ten (80%) state senators would choose building a road to encourage economic development.

Stakeholders Rate NDOR Effectiveness

Stakeholders Rate NDOR: Planning the Transportation System as a Whole						
Respondent Type	Number of Respondents	Not at all Effective	Not very Effective	Somewhat Effective	Very Effective	Total % Effective (Somewhat + Very Effective)
Business	970	5%	20%	58%	17%	75%*
Private Citizen	1,922	9%	29%	49%	13%	62%*
Federal Government	22	5%	18%	45%	32%	77%
State Government	111	2%	21%	51%	26%	77%*
State Senator	15	0%	33%	47%	20%	67%
Local Government	538	4%	19%	59%	18%	77%*
Transportation Association	25	8%	12%	52%	28%	80%
Tribal Government	5	0%	20%	80%	0%	80%
All Respondents	3,634	7%	25%	53%	16%	68%
*Respondent Type with a significant difference from the all respondent total % effective						

NDOR's ability to plan the transportation system as a whole has a 68% effective rating overall, with over three fourths (77%) of both state and local government respondents and three fourths (75%) of business respondents rating NDOR effective. Private citizens rate NDOR's effectiveness at planning the transportation system as a whole lower than the overall, with six out of ten (62%) rating NDOR effective.

Stakeholders Rate NDOR: Completing Transportation Projects						
Respondent Type	Number of Respondents	Not at all Effective	Not very Effective	Somewhat Effective	Very Effective	Total % Effective (Somewhat + Very)
Business	1,007	5%	16%	56%	24%	80%*
Private Citizen	1,958	5%	20%	56%	19%	75%
Federal Government	22	5%	9%	64%	23%	86%
State Government	116	1%	10%	55%	34%	89%*
State Senator	15	0%	7%	53%	40%	93%*
Local Government	564	5%	19%	55%	21%	76%
Transportation Association	24	4%	17%	42%	38%	79%
Tribal Government	4	0%	25%	50%	25%	75%
All Respondents	3,738	5%	18%	55%	21%	77%
*Respondent Type with a significant difference from the all respondent total % effective						

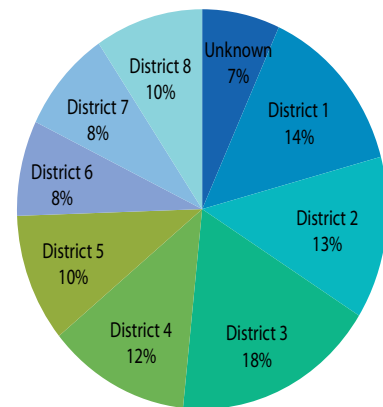
Over three fourths (77%) of survey respondents overall rate NDOR effective at completing transportation projects. More than nine out of ten (93%) state senators, nine out of ten (89%) state government respondents and eight out of ten (80%) business respondents rate the department effective at completing transportation projects.

Business and Government Respondents by District

Business and Government Respondents by District					
District	Number of Respondents	Percent of Respondents by District	Sample Size*	Response Rate	Margin of Error (±%)
Unknown	92	7%			
District 1	189	14%	1,598	12%	6.7%
District 2	177	13%	1,143	15%	6.8%
District 3	240	18%	1,182	20%	5.7%
District 4	168	12%	1,236	14%	7.0%
District 5	140	10%	662	21%	7.4%
District 6	104	8%	643	16%	8.8%
District 7	113	8%	717	16%	8.5%
District 8	128	9%	585	22%	7.7%
Statewide	1,351	100%	7,766	17%	2.4%

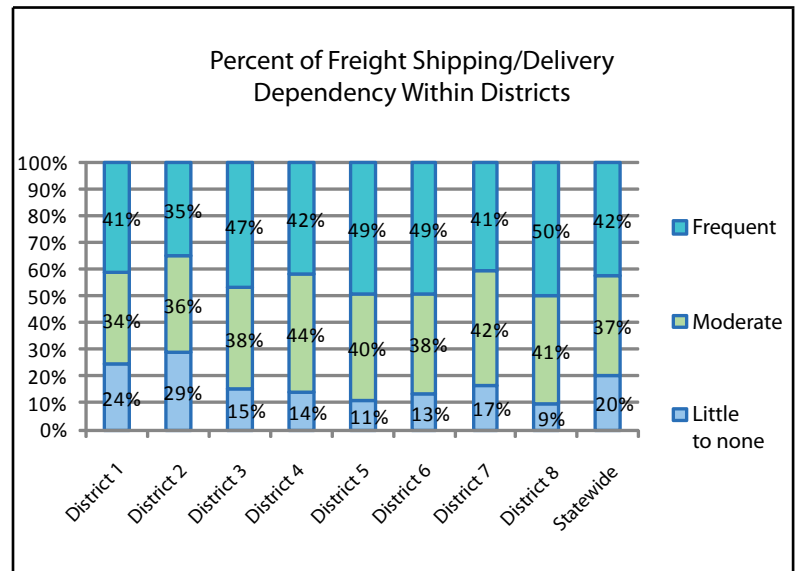
Business and government respondents were spread across all districts, with the largest percent of respondents in district 3, which had 18% of the total. District 8 enjoyed the highest response rate of 22%. The margin of error statewide for freight dependent respondents is 2.4%.

Percent of Business Respondents by District



Freight Dependency by District

Percent of Respondents by Freight Dependency Within Districts				
District	Little to None	Moderate	Frequent	Moderate + Frequent
District 1	24%	34%	41%	76%
District 2	29%	36%	35%	71%
District 3	15%	38%	47%	85%
District 4	14%	44%	42%	86%
District 5	11%	40%	49%	89%
District 6	13%	38%	49%	87%
District 7	17%	42%	41%	83%
District 8	9%	41%	50%	91%
Statewide	20%	37%	42%	80%



As might be expected, the more populated districts 1 and 2 have more than the statewide average of respondents with little to no dependency on shipping at 24% and 29% respectively.

Business and Government Respondents by Industry

Business and Government Respondents by Industry				
Industry	Number of Respondents	Sample Size	Response Rate	Margin of Error
Unknown	124			
Construction	100	432	23%	8.60%
Education and Health Services	121	410	30%	7.50%
Financial Activities	57	354	16%	12%
Government	160	1,810	9%	7.40%
Information	28	67	42%	14.40%
Leisure and Hospitality	58	361	16%	11.90%
Manufacturing	63	200	32%	10.30%
Natural Resources and Mining	247	215	115%	N/A*
Other Services	93	309	30%	8.50%
Professional and Business Services	60	470	13%	11.90%
Trade, Transportation, and Utilities	240	1,119	21%	5.60%
Total	1,227	5,747	21%	2.50%
*Volunteer respondents in this industry resulted in a response larger than the original sample.				

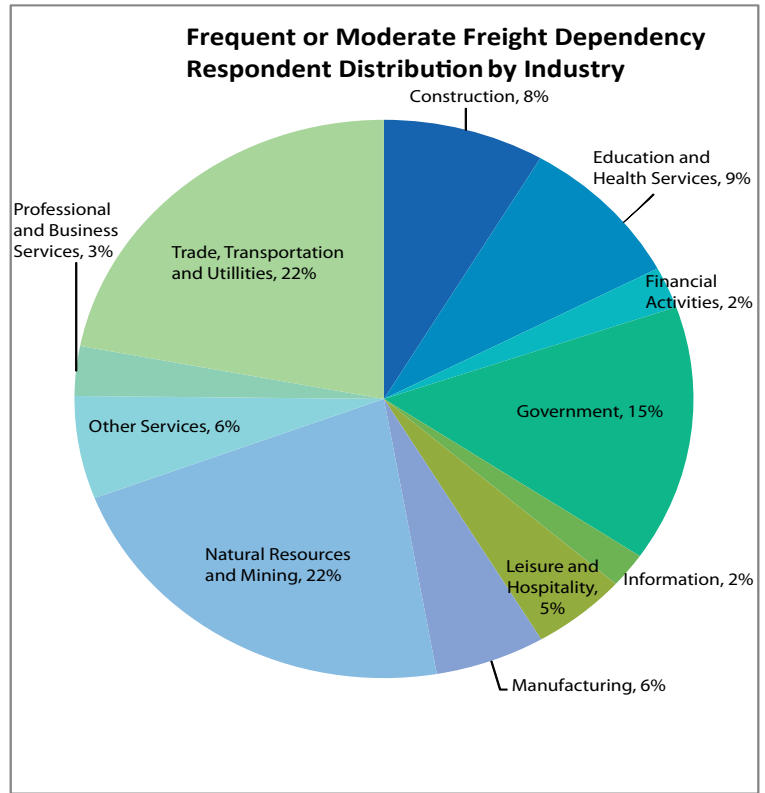
Looking at the business and government respondents by industry, reveals that the majority are in natural resources and mining, followed by the trade, transportation and utilities industry. There were volunteer respondents in the natural resources and mining industry, presumably from farmers or ranchers, which is greatly appreciated.

Business Respondents Dependency on Freight Shipping/Delivery								
Industry	Industry Total	Little to None		Moderate		Frequent		% Moderate + Frequent
		#	%	#	%	#	%	
Construction	100	12	12%	44	44%	44	44%	88%
Education and Health Services	121	29	24%	59	49%	33	27%	76%*
Financial Activities	57	32	56%	19	33%	6	11%	44%*
Government	160	5	3%	129	81%	26	16%	97%*
Information	28	7	25%	10	36%	11	39%	75%
Leisure and Hospitality	58	6	10%	21	36%	31	53%	90%
Manufacturing	63	3	5%	9	14%	51	81%	95%*
Natural Resources and Mining	247	18	7%	90	36%	139	56%	93%*
Other Services	93	31	33%	26	28%	36	39%	67%*
Professional and Business Services	60	30	50%	18	30%	12	20%	50%*
Trade, Transportation, and Utilities	240	11	5%	60	25%	169	70%	95%*
All Industries	1,227	275	22%	505	41%	571	47%	88%
*Industries with a significant difference in % of freight shipping/delivery dependency from all industries.								

Of the business and government respondents, 1,227 identified their industry. Of these, 88% state that they have either moderate or frequent freight shipping/delivery dependency. These 1,076 respondents were asked the remaining questions on freight movement.

Moderate/Frequent Freight Dependency by Industry

Distribution by Industry of Respondents with Moderate/ Frequent Freight Dependency	
Industry	#
Construction	88
Education and Health Services	92
Financial Activities	25
Government	155
Information	21
Leisure and Hospitality	52
Manufacturing	60
Natural Resources and Mining	229
Other Services	62
Professional and Business Services	30
Trade, Transportation and Utilities	229
All Industries	1,043



The business and government respondents who have moderate or frequent dependency on freight were asked the additional questions on strategies for the movement of freight. These respondents are in all industries, with the largest percent from the natural resources and mining industry and the trade, transportation and utilities industry, each comprising 22% of the total sample.

Business Respondents Rate Strategies for Enhanced Goods Movement

New or Wider Highways						
Industry	Number of Respondents	Not at all Important	Not Very Important	Some-what Important	Very Important	Total % Important (Some-what Important + Very Important)
Construction	86	1%	15%	44%	40%	84%
Education and Health Services	89	1%	21%	43%	35%	78%
Financial Activities	22	0%	9%	46%	46%	91%
Government	153	1%	17%	39%	43%	82%
Information	20	5%	10%	55%	30%	85%
Leisure and Hospitality	51	0%	28%	29%	43%	73%
Manufacturing	57	0%	9%	28%	63%	91%*
Natural Resources and Mining	216	5%	13%	44%	38%	82%
Other Services	60	3%	8%	62%	27%	88%
Professional and Business Services	29	0%	14%	41%	45%	86%
Trade, Transportation, and Utilities	223	1%	16%	40%	44%	83%
All Industries	1,030	2%	15%	42%	41%	83%

*Industries with a significant difference from the all industries total % Important.

More than eight out of ten (83%) respondents rate “new or wider highways” as important, with nine out of ten (91%) manufacturing respondents rating this strategy significantly more important to their industry than the overall.

Better Connections (Roadways, Bridges, etc.) Between Farm and Market						
Industry	Number of Respondents	Not at all Important	Not Very Important	Some-what Important	Very Important	Total % Important (Some-what Important + Very Important)
Construction	85	7%	25%	44%	25%	68%
Education and Health Services	80	3%	20%	46%	31%	77%
Financial Activities	24	0%	17%	33%	50%	83%
Government	149	3%	17%	36%	45%	81%
Information	17	0%	24%	59%	18%	76%
Leisure and Hospitality	49	6%	27%	41%	27%	67%
Manufacturing	57	4%	25%	37%	35%	72%
Natural Resources and Mining	221	2%	9%	31%	58%	90%*
Other Services	58	14%	9%	50%	28%	78%
Professional and Business Services	27	0%	19%	59%	22%	82%
Trade, Transportation, and Utilities	214	6%	24%	37%	33%	70%*
All Industries	1,004	4%	19%	39%	39%	77%

*Industries with a significant difference from the all industries total % Important.

The strategy of “better connections between farm and market” is important to over three fourths (77%) of respondents, while nine out of ten (90%) respondents in the natural resources and mining industry rate this strategy important. The trade, transportation and utilities industry rate the strategy less important than the overall, at 70% important.

Separation of Railroad and Road Crossings, Using Bridges or Underpasses						
Industry	Number of Respondents	Not at all Important	Not Very Important	Somewhat Important	Very Important	Total % Important (Somewhat Important + Very Important)
Construction	82	10%	26%	44%	21%	65%
Education and Health Services	83	7%	31%	37%	24%	61%
Financial Activities	23	4%	26%	39%	30%	70%
Government	142	9%	32%	37%	22%	58%
Information	19	5%	21%	53%	21%	74%
Leisure and Hospitality	50	12%	36%	26%	26%	52%
Manufacturing	57	4%	23%	37%	37%	74%*
Natural Resources and Mining	209	12%	28%	38%	22%	60%
Other Services	58	12%	29%	40%	19%	59%
Professional and Business Services	29	3%	21%	41%	35%	76%
Trade, Transportation, and Utilities	208	12%	28%	38%	23%	60%
All Industries	984	10%	29%	38%	23%	62%

*Industries with a significant difference from the all industries total % Important.

Six out of ten (62%) respondents rate the “separation of railroad and road crossings, using bridges or underpasses” as important. With a rating of 74% important, the manufacturing industry rated this strategy significantly higher than the overall.

Shift Some of the Goods Movement From Truck to Air, Rail or Water						
Industry	Number of Respondents	Not at all Important	Not Very Important	Somewhat Important	Very Important	Total % Important (Somewhat Important + Very Important)
Construction	78	18%	55%	23%	4%	27%
Education and Health Services	75	17%	44%	28%	11%	39%
Financial Activities	22	9%	41%	23%	27%	50%
Government	135	15%	47%	25%	13%	38%
Information	18	22%	67%	11%	0%	11%*
Leisure and Hospitality	43	19%	37%	21%	23%	44%
Manufacturing	53	28%	49%	13%	9%	23%*
Natural Resources and Mining	200	27%	35%	27%	11%	38%
Other Services	54	19%	41%	28%	13%	41%
Professional and Business Services	27	19%	41%	26%	15%	41%
Trade, Transportation, and Utilities	204	27%	42%	19%	13%	31%
All Industries	929	22%	43%	23%	12%	35%

*Industries with a significant difference from the all industries total % Important.

With 35% important overall, the strategy to “shift some of the goods movement from truck to air, rail or water” has the lowest important rating of all the strategies in the survey. The manufacturing industry and the information industry rate this strategy significantly lower than overall, with 23% and 11% important, respectively.

Dedicated Lanes on Highways for Commercial Trucks						
Industry	Number of Respondents	Not at all Important	Not Very Important	Some-what Important	Very Important	Total % Important (Some-what Important + Very Important)
Construction	81	7%	37%	38%	17%	56%
Education and Health Services	80	11%	40%	30%	19%	49%
Financial Activities	23	9%	48%	26%	17%	44%
Government	143	11%	37%	35%	18%	53%
Information	19	16%	47%	32%	5%	37%
Leisure and Hospitality	49	14%	35%	33%	18%	51%
Manufacturing	59	10%	32%	32%	25%	58%
Natural Resources and Mining	212	11%	33%	36%	20%	56%
Other Services	58	10%	50%	29%	10%	40%
Professional and Business Services	28	7%	50%	36%	7%	43%
Trade, Transportation, and Utilities	217	12%	29%	37%	22%	59%
All Industries	994	11%	36%	34%	19%	53%
No significant differences were found from the all Industries Total % Important.						

Over half (53%) of the respondents rate the strategy of having “dedicated lanes on highways for commercial trucks” as important, with no significant differences found between industry responses and the overall.

Better Freight Rail Service						
Industry	Number of Respondents	Not at all Important	Not Very Important	Some-what Important	Very Important	Total % Important (Some-what Important + Very Important)
Construction	76	11%	49%	34%	7%	41%
Education and Health Services	73	15%	41%	36%	8%	44%
Financial Activities	23	9%	35%	35%	22%	57%
Government	138	9%	38%	38%	15%	53%
Information	17	18%	53%	29%	0%	29%
Leisure and Hospitality	44	21%	34%	30%	16%	45%
Manufacturing	54	9%	43%	28%	20%	48%
Natural Resources and Mining	197	13%	38%	36%	14%	50%
Other Services	51	8%	45%	33%	14%	47%
Professional and Business Services	24	0%	38%	38%	25%	63%
Trade, Transportation, and Utilities	206	20%	33%	32%	16%	47%
All Industries	923	13%	39%	34%	14%	48%
No significant differences were found from the all Industries Total % Important.						

“Better freight rail service” is important to half (48%) of respondents overall, with no significant differences found by industry.

Better Connections for Freight Movement Between Trucks, Barges, Trains and Airplanes						
Industry	Number of Respondents	Not at all Important	Not Very Important	Somewhat Important	Very Important	Total % Important (Somewhat Important + Very Important)
Construction	79	9%	37%	41%	14%	54%
Education and Health Services	77	7%	26%	47%	21%	68%
Financial Activities	23	4%	26%	48%	22%	70%
Government	139	5%	42%	38%	14%	53%
Information	17	12%	41%	41%	6%	47%
Leisure and Hospitality	46	13%	30%	39%	17%	57%
Manufacturing	55	11%	35%	38%	16%	55%
Natural Resources and Mining	204	7%	33%	48%	12%	60%
Other Services	53	8%	32%	40%	21%	60%
Professional and Business Services	25	0%	32%	56%	12%	68%
Trade, Transportation, and Utilities	210	11%	27%	40%	22%	62%
All Industries	950	8%	33%	42%	17%	59%
No significant differences were found from the all Industries Total % Important.						

Six out of ten (59%) respondents rate “better connections for freight movement between trucks, barges, trains and airplanes” important. No difference between the overall and industry responses was found.

Increased Maintenance of Existing Roads and Bridges						
Industry	Number of Respondents	Not at all Important	Not Very Important	Somewhat Important	Very Important	Total % Important (Somewhat Important + Very Important)
Construction	88	0%	2%	19%	78%	98%
Education and Health Services	89	0%	0%	16%	84%	100%*
Financial Activities	24	0%	4%	13%	83%	96%
Government	154	0%	1%	10%	89%	99%
Information	20	0%	0%	15%	85%	100%*
Leisure and Hospitality	52	0%	0%	25%	75%	100%*
Manufacturing	59	0%	2%	10%	88%	98%
Natural Resources and Mining	222	0%	1%	15%	85%	100%*
Other Services	61	0%	2%	16%	82%	98%
Professional and Business Services	30	0%	3%	27%	70%	97%
Trade, Transportation, and Utilities	227	0%	2%	16%	82%	98%
All Industries	1,053	0%	1%	16%	83%	99%
*Industries with a significant difference from the all industries total % Important.						

The strategy of “increased maintenance of existing roads and bridges” has the highest important rating of all strategies at 99%. Industries giving this strategy a 100% important rating include education and health services, information, leisure and hospitality, and natural resources and mining.

Importance of Mode of Travel by Industry

Total % Important (Somewhat Important + Very Important)					
Industry	Water	Air	Rail	Delivery Van	Truck
Construction	8%	26%	26%	87%	99%
Education and Health Services	9%	37%	31%	98%*	93%
Financial Activities	13%	52%	35%	96%*	100%*
Government	13%	30%	39%	91%	92%*
Information	0%*	37%	17%*	100%*	91%
Leisure and Hospitality	14%	29%	33%	90%	98%
Manufacturing	15%	35%	44%	73%*	100%*
Natural Resources and Mining	19%	28%	52%*	74%*	100%*
Other Services	10%	31%	20%*	90%	92%
Professional and Business Services	11%	64%*	37%	90%	100%*
Trade, Transportation, and Utilities	18%	36%	29%	88%	97%
All Industries	14%	33%	36%	86%	97%
Number of Respondents	851	868	874	1,000	1,036
*Industries with a significant difference from the all industries total % Important.					

Respondents were asked to rate how important various transportation modes are to freight movement in their business. Trucking is the mode of transportation that received the highest overall rating of 97%, followed by delivery van with 86% overall. It's of interest to note that almost two thirds (64%) of the professional and business services industry rate air travel as important compared to 33% overall. Half of respondents in the natural resources and mining industry rate rail important compared to the overall rate of 36%.