

Section 1:
Consolidated Report
Executive Summary

2019 Sioux Falls Metropolitan Area LRTP Market Research Study Consolidated Report Executive Summary

Purpose and Overview

During the summer of 2019, the Sioux Falls Metropolitan Planning Organization (MPO) conducted a comprehensive market research study to gather input from the community about transportation planning issues in the Sioux Falls Metropolitan Planning Area (see Appendix C). The results of the study will be used to help identify priorities for the region's long-range transportation plan. This was the fifth time the MPO has conducted a comprehensive transportation market research assessment; previous studies were completed in 1999, 2005, 2010, and 2014.

The five major components of the study included:

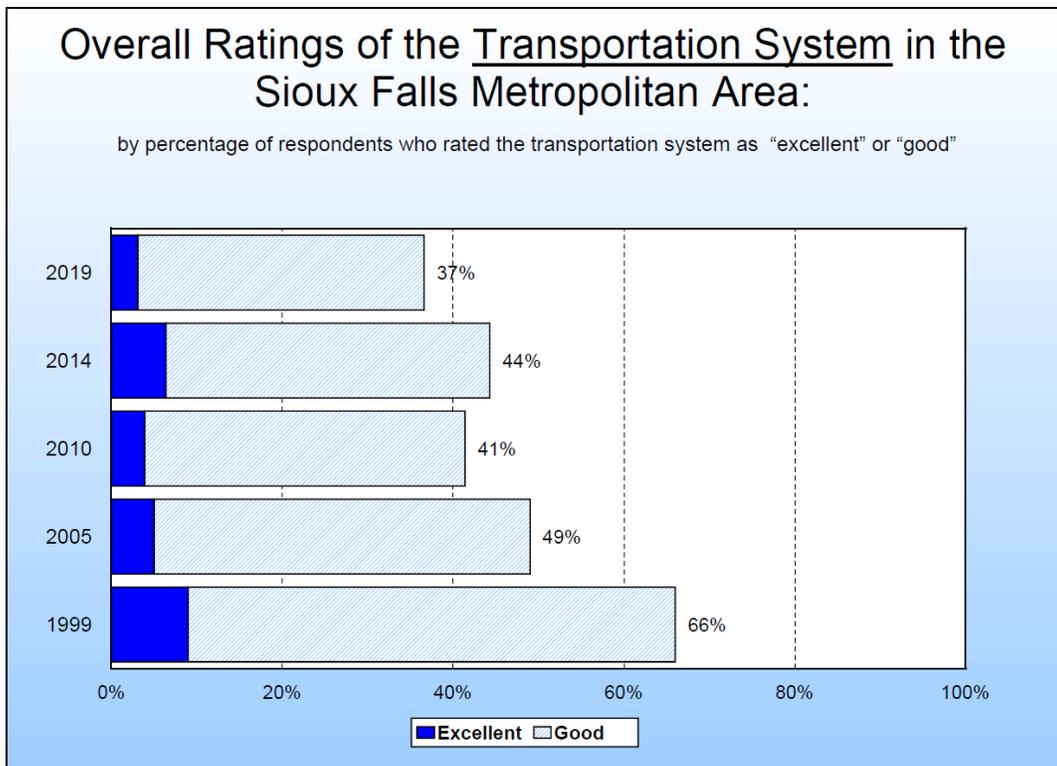
- A resident survey, which was administered to a random sample of 1,025 residents from the Sioux Falls MPO area. The 2019 survey contained many of the same questions that were asked on previous surveys to allow community leaders to see how attitudes of residents have changes over the past twenty years. The results of the resident survey have a precision of at least +/-3% at the 95% level of confidence. The results of the resident survey are provided in Section 2 of this report.
- An employer survey, which was administered to a random sample of 310 employers from the Sioux Falls MPO area. The 2019 survey contained many of the same questions that were asked to employers on previous surveys to allow community leaders to see how the perceptions of the business community have changed over the past twenty years. The results of the employer survey have a precision of at least +/-5.5% at the 95% level of confidence. The results of the employer survey are provided in Section 3 of this report.
- A survey of traditionally underserved populations, which was administered to 222 persons who met one or more of the following criteria: had a physical disability, were the caretaker of someone with a cognitive disability, lived in poverty, were not able to speak English, did not have access to a vehicle, or were homeless. The survey was administered by ETC Institute with assistance of agencies who provide support to these population groups in the Sioux Falls area. The survey of traditionally underserved populations was designed to ensure that the needs of these groups were adequately represented in the 2019 LRTP Market Research Study. The results of the traditionally underserved populations survey are provided in Section 4 of this report.
- Focus groups were conducted with residents in the Sioux Falls area during the month of May 2019. The purpose of the focus groups was to gather input about a wide range of issues related to the Sioux Falls Long Range Transportation Plan Survey. A summary of the focus groups is provided in Section 5 of this report.

- Stakeholder Interviews were conducted with transportation stakeholders in the Sioux Falls area during the month of April 2019. The purpose of the internal interviews was to gather input about a wide range of issues related to the Sioux Falls Long Range Transportation Plan Survey. A summary of the stakeholder interviews is provided in Section 6 of this report.

Major Findings

Ratings of the Region’s Transportation System Have Decreased.

Since 1999, the percentage of residents surveyed in the Sioux Falls area who rate the region’s transportation system as “excellent” or “good” has declined from 66% to 37% in 2019 (see chart below). Although major investments in transportation have been made in the Sioux Falls area over the past 20 years, the lower ratings suggest that the region’s investments in transportation are not keeping up with expectations and growth in the region. In 1999, the population of the Sioux Falls Metropolitan Statistical area was 168,300. In 2019, the population surpassed 266,000.

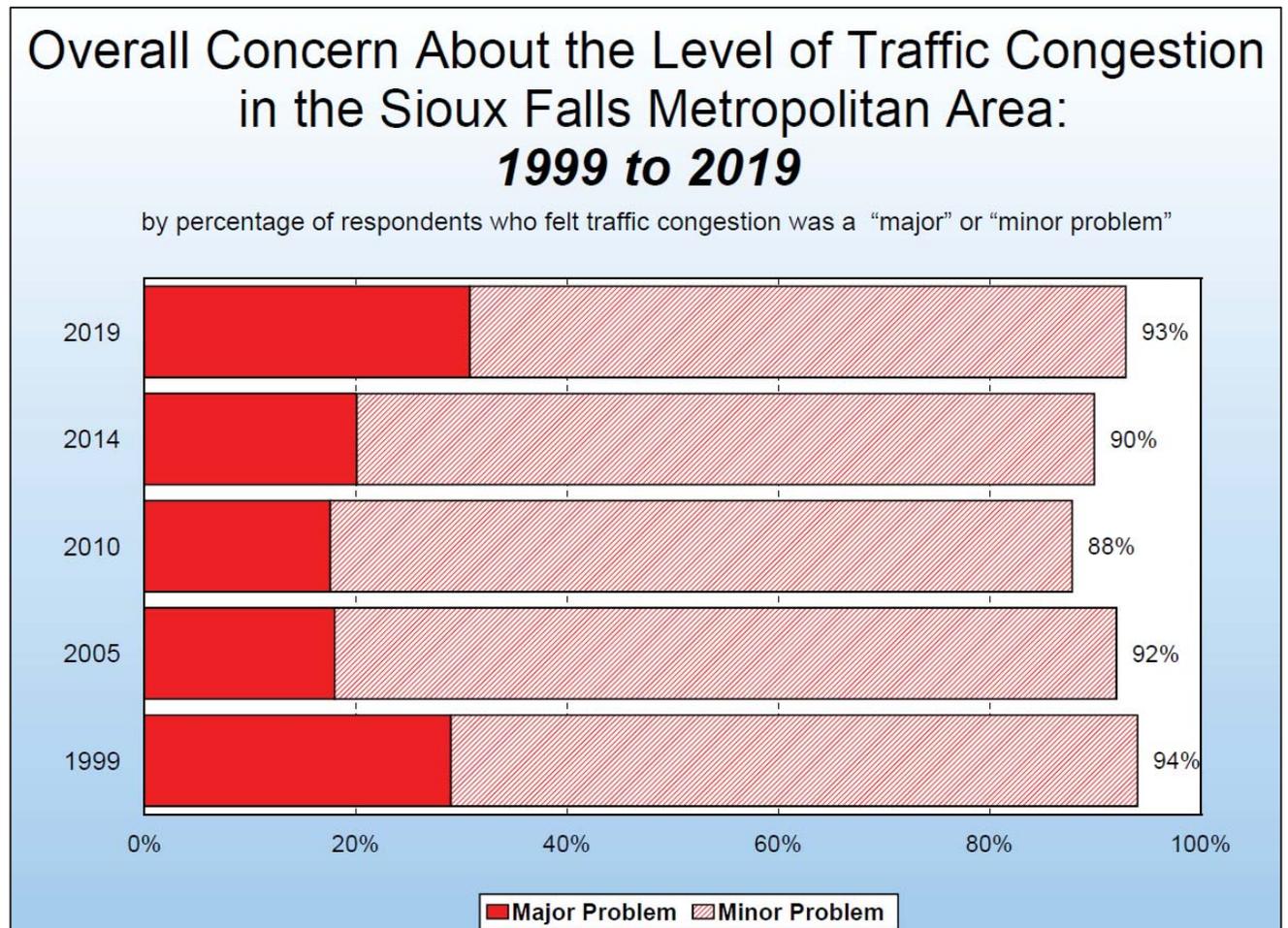


Satisfaction with Street Maintenance Has Declined in Most Areas.

- Satisfaction with the maintenance of city streets in the City of Sioux Falls decreased by 20% from 2014 to 2019
- Satisfaction with the maintenance of rural roads in the Sioux Falls area decreased by 13% from 2014 to 2019
- Satisfaction with the maintenance of city streets outside Sioux Falls decreased by 12% from 2014 to 2019

Concerns about Traffic Congestion Remain High.

- Satisfaction with the ease of travel to/from Sioux Falls and other communities in the Sioux Falls area decreased by 11% from 2014 to 2019
- Satisfaction with the ease of travel from one side of the City of Sioux Falls to the other side decreased by 7% from 2014 to 2019
- The percentage of residents who reported that the thought traffic congestion was a “major problem” in the Sioux Falls area increased by 11% from 2014 to 2019

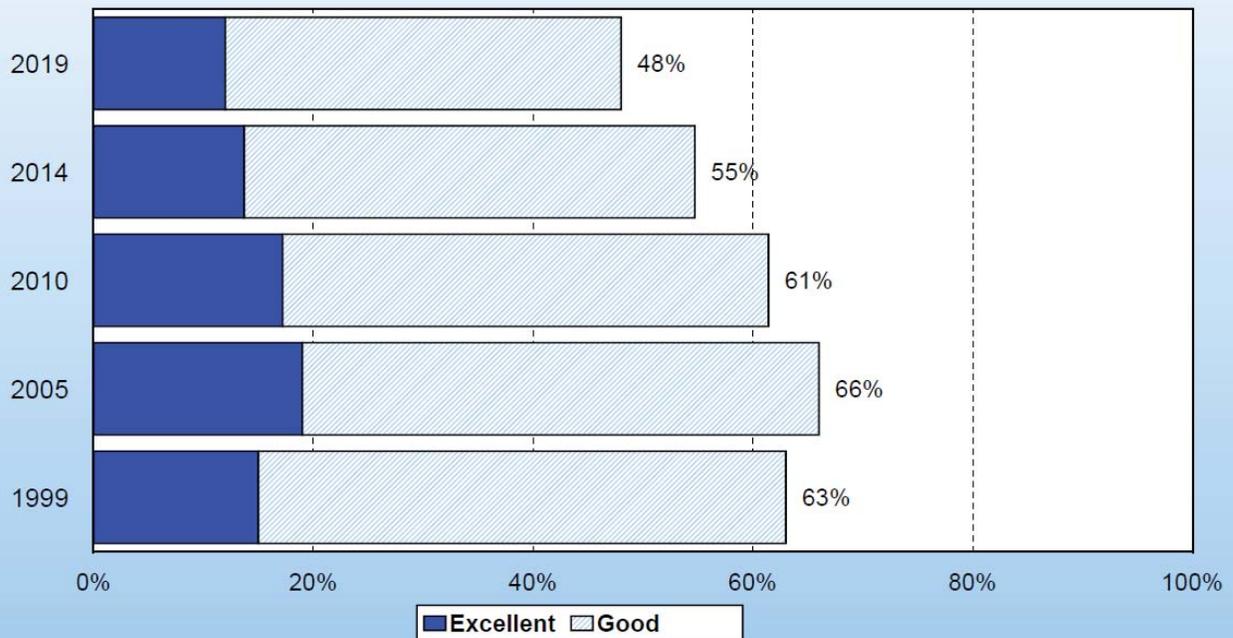


Ratings of Traffic Safety Near Schools Has Decreased.

The percentage of residents who rated traffic safety near schools good or excellent has decreased from 66% in 2005 to 48% in 2019. According to a statewide survey of South Dakota residents conducted by the South Dakota Department of Transportation indicated that “distracted drivers” were perceived to be the biggest traffic safety problem on state highways. The lower ratings for traffic safety near schools could be a result of rising concerns about “distracted drivers” due to increased usage of cell phones and texting while driving.

Ratings of Traffic Safety Near Schools in the Sioux Falls Metropolitan Area:

by percentage of respondents who felt the traffic safety near schools was “excellent” or “good”



Transportation Improvements Respondents Were Willing to Fund Most in the Sioux Falls Metropolitan Area.

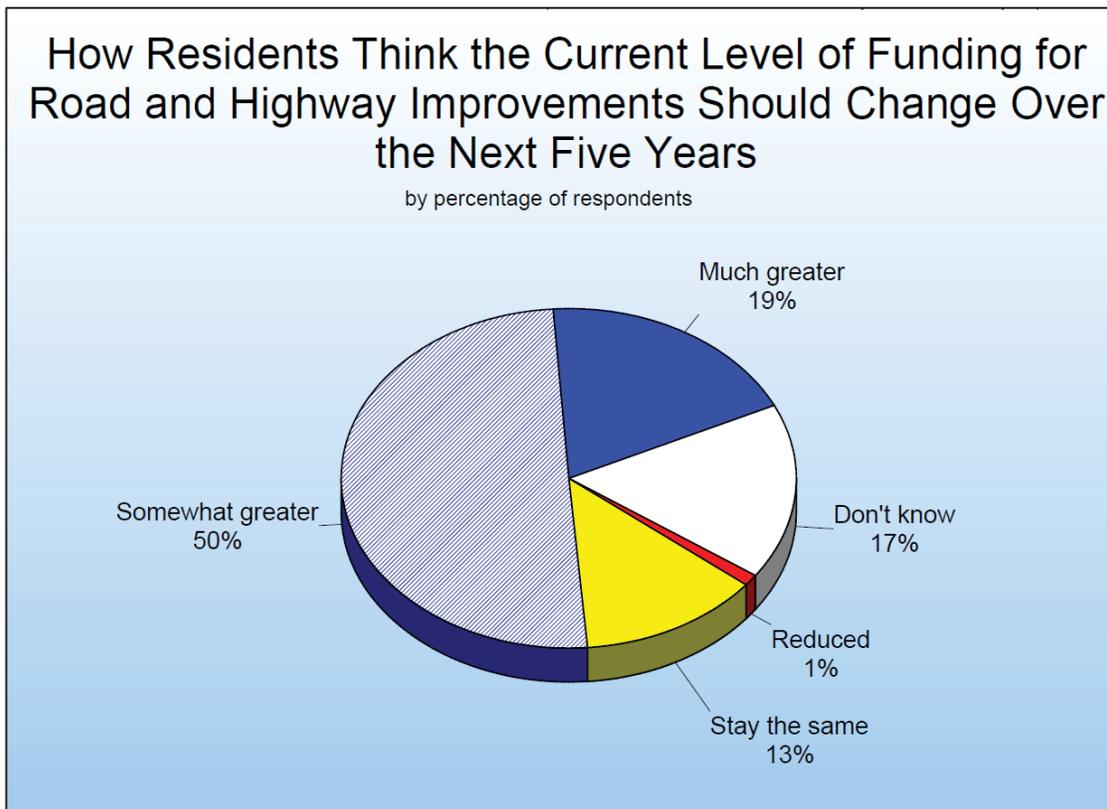
The table on the top of the following page shows the top 5 priorities for transportation investments for each of the three groups that were surveyed based on the percentage of respondents who selected the investment as one of their top priorities. The top priority for all three groups was the same: improvements to east-west roads in Sioux Falls, and two of the remaining top 5 priorities were also the same for all three groups: improving north-south roads in Sioux Falls and improving the timing of traffic signals.

Traditionally underserved populations placed more importance on improving (1) public transportation and (2) transportations services for seniors and persons with disabilities. Residents placed slightly more importance on improving existing interchanges on interstates while employers placed slightly more importance on improving roads in rural areas that link to Sioux Falls.

Transportation Improvements Respondents Were Willing to Fund Most			
Rank	Resident	Employer	Underserved
1	Improving east-west roads in Sioux Falls	Improving east-west roads in Sioux Falls	Improving east-west roads in Sioux Falls
2	Improving north-south roads in Sioux Falls	Improving north-south roads in Sioux Falls	Improving public transportation inside
3	Improving the timing of traffic lights	Improving the timing of traffic lights	Improving north-south roads in Sioux Falls
4	Adding interchanges on the Interstates	Adding interchanges on the Interstates	Improving the timing of traffic lights
5	Improving existing interchanges on Interstates	Improving roads in rural areas that link to Sioux Falls	Improving transportation for seniors/persons with

Residents and Employers Think Funding for Transportation Should Be Increased

More than two-thirds (69%) of residents and 72% of employers thought that the level of funding for road and highway improvements should be increased over the next 5 years. Among residents and employers who had an opinion, 66% of employers and 59% of residents thought funding for public transportation should be increased over the next 5 years.



- **Current or Emerging Issues in the Region’s Transportation System.** The one issue residents felt was the biggest problem with the region’s transportation system, based upon a combined percentage of respondents who rated the item as a “current” or “emerging” issue, was congestion on East-West roads in the City of Sioux Falls.

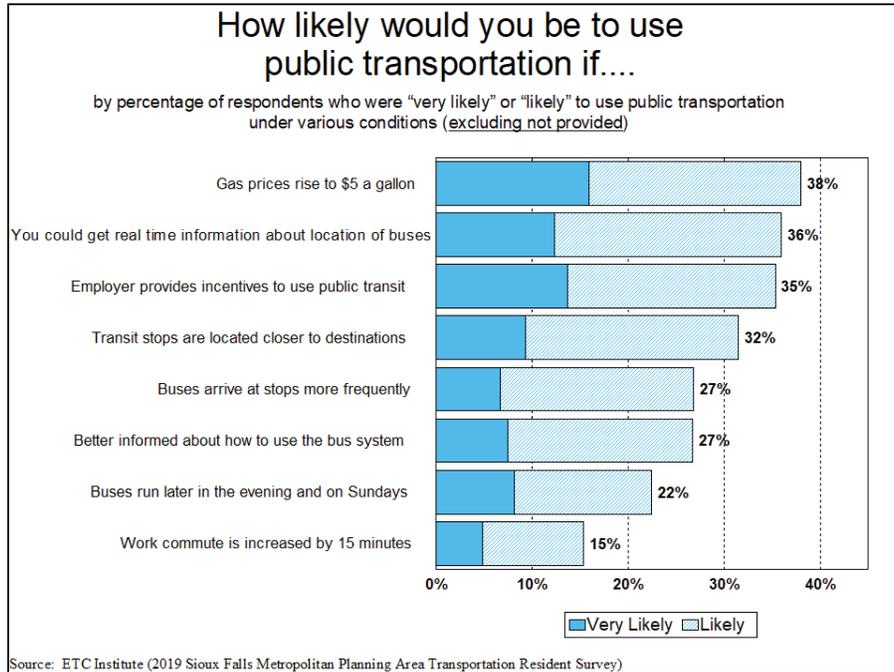
- **Streets and Corridors that Should Receive the Highest Priority for Improvements.** Based on the sum of their top four choices, the streets or roads in the metropolitan area that residents and employers felt should receive the top priority for improvement were:
 - (1) 41st Street
 - (2) Minnesota Avenue/SD 115
 - (3) Cliff Avenue
 - (4) 26th Street.

- **How Employers Would Allocate Transportation Funding for the Sioux Falls Area.** Seventy-two percent (72%) of the employers surveyed indicated the current level of funding for road and highway improvements in the area should be greater over the next five years. When asked how they would allocate \$100 of transportation funding for the Sioux Falls area, employers collectively provided the following response:
 - \$32 for improvements to existing streets and roads in the City of Sioux Falls
 - \$21 for improvements to existing streets and roads in the rural areas
 - \$20 for the development of new roads in future growth areas
 - \$11 for bus/public transportation improvements
 - \$ 8 for airport and rail facilities
 - \$ 8 for improvements to bicycle and pedestrian facilities

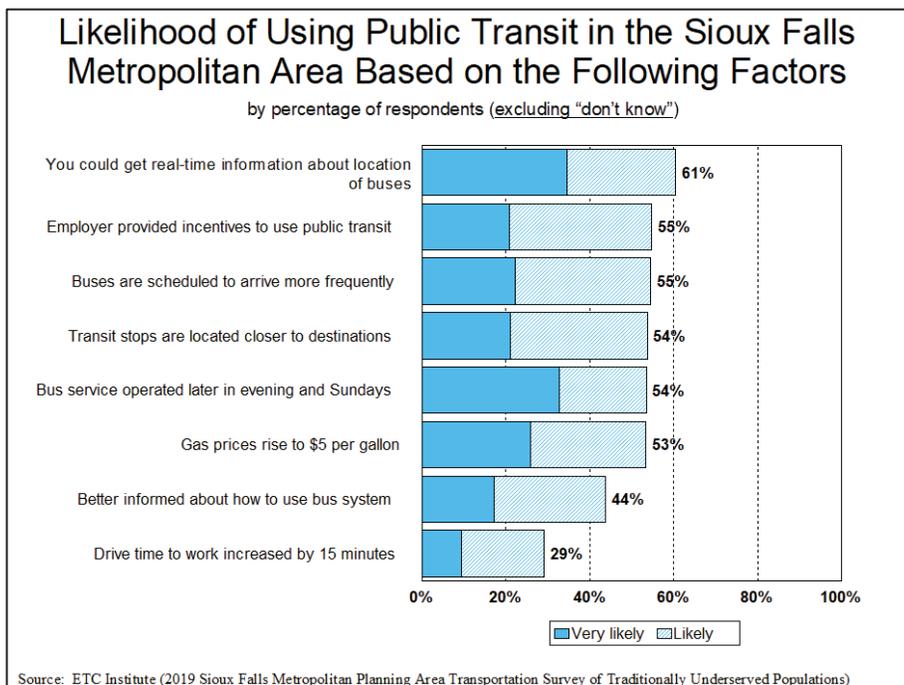
- **Ratings of the Public Transportation System.** In the Fall of 2018, a random sample of 347 Sioux Falls Area Metro transit users were surveyed. Eighty-three percent (83%) of transit users rated region’s public transportation system as “good” or “excellent”, and only 2% rated the system as poor. Although current users gave the system high ratings, only 27% of the traditionally underserved survey respondents gave “good” or “excellent” ratings and 20% rated the system as poor.
 - **Opportunities for improvement to Bus Service.** Based on the results of the On-Board Transit Survey, the top three opportunities for improvement to transit services were:
 - Availability of weekend service
 - Availability of evening service
 - Availability of covered shelters at stops

- Likelihood of Using Public Transit Based on Various Factors.** Residents and traditionally underserved populations were asked how likely they would be to use public transit or use it more often based on various factors. The charts below show how each group responded.

Likelihood of Residents Using Public Transportation:



Likelihood of Underserved Populations Using Public Transportation:



Guiding Objectives

The focus groups and surveys were designed to identify guiding objectives for long range transportation planning in Sioux Falls Metropolitan Planning Area. The guiding objectives reflect the overall top priorities for transportation that were identified by the majority of residents and employers in the area. These objectives should be used as a guide to help prioritize long range transportation investments.

The results of this study identified the following guidelines should continue to be used to set priorities for transportation investments in the region:

- **Enhancing people’s ability to travel throughout the Sioux Falls area**
- **Ensuring that residents can safely travel in the region**
- **Ensuring that the capacity of the region’s transportation system can accommodate projected increases in population**
- **Developing and encouraging the use of alternative modes of transportation, such as public transportation, biking, walking, and ride sharing.**

Transportation planners and elected officials should use these guidelines to help set long range transportation priorities for the Sioux Falls Metropolitan Planning Organization. Decisions to make major long range transportation investments should be reviewed with regard to how the investment supports these objectives. **Investments that support the guiding objectives should receive higher priority than those that do not.**

Possible Seed Projects

The market research identified several areas that should be considered as seed projects and/or as areas for further study.

- **Maintenance of streets in the City of Sioux Falls and the surrounding communities in the MPO planning area**
- **Improvements to traffic flow in the City of Sioux Falls, which could include intersection and capacity improvements that allow residents to travel to/from major destinations in the region, including Empire Mall, Downtown Sioux Falls, Eastside Shopping area, and the Convention Center/Arena**
- **Investments in public transportation to meet the needs of seniors, low income and other underserved populations in the region**
- **Expansion of the region’s walking and biking system to ensure residents can safely walk and bike in the region**

Contents of this Report

In addition to the items described in this summary, some of the other issues addressed in this study included: traffic safety, traffic flow, condition of rural roads/highways, and truck traffic. Please refer to the following sections of this report to view the results of individual components of this study:

- Section 2: Resident Survey Report
- Section 3: Employer Survey Report
- Section 4: Survey of Traditionally Underserved Populations Report
- Section 5: Focus Groups Summary
- Section 6: Summary of Stakeholders Interviews
- Appendix A: Summary Report for the On-Board Transit User Survey
- Appendix B: GIS Maps of Results to the Resident Survey
- Appendix C: Sioux Falls Metropolitan Planning Organization Boundary Map