2021 Customer Survey Results

JUNE 3, 2022

PRESENTED BY

ETC INSTITUTE

ETC Institute is the Leader in Market Research for State and Local Governments. Clients include 27 of the 35 largest public transit systems in the United States

Since 2011, ETC Institute Has Surveyed More Than 3,000,000 People for More Than 1,000 government agencies on 4 continents!

For more than 35 years, our mission has been to help local governments gather and use survey data to make better decisions.

Agenda

- Purpose and Methodology
- Major Findings:
  - Topic 1: Characteristics of Transit Users
  - Topic 2: Satisfaction with Bus and Streetcar Services
  - Topic 3: Opportunities for Improvement
  - Topic 4: Other Issues
- Summary
- Questions

Purpose and Methodology

Purpose of the Survey

- Better understand the characteristics of riders
- Assess satisfaction with transit services and changing expectations over time
- Identify opportunities to maximize the investment of available resources to continually improve the quality of services provided
- Gather feedback on other issues that may impact decisions related to transit service

Methodology

- The survey was administered during the fall of 2021
- A total of 1,432 total surveys were completed with OKC Riders
  - ➤ 1,279 riders were surveyed on buses
  - ➤ 252 riders surveyed on the Streetcar
- Another 153 surveys were collected on routes in Norman
- Overall results have a precision of at least +/-2.5% at the 95% level of confidence

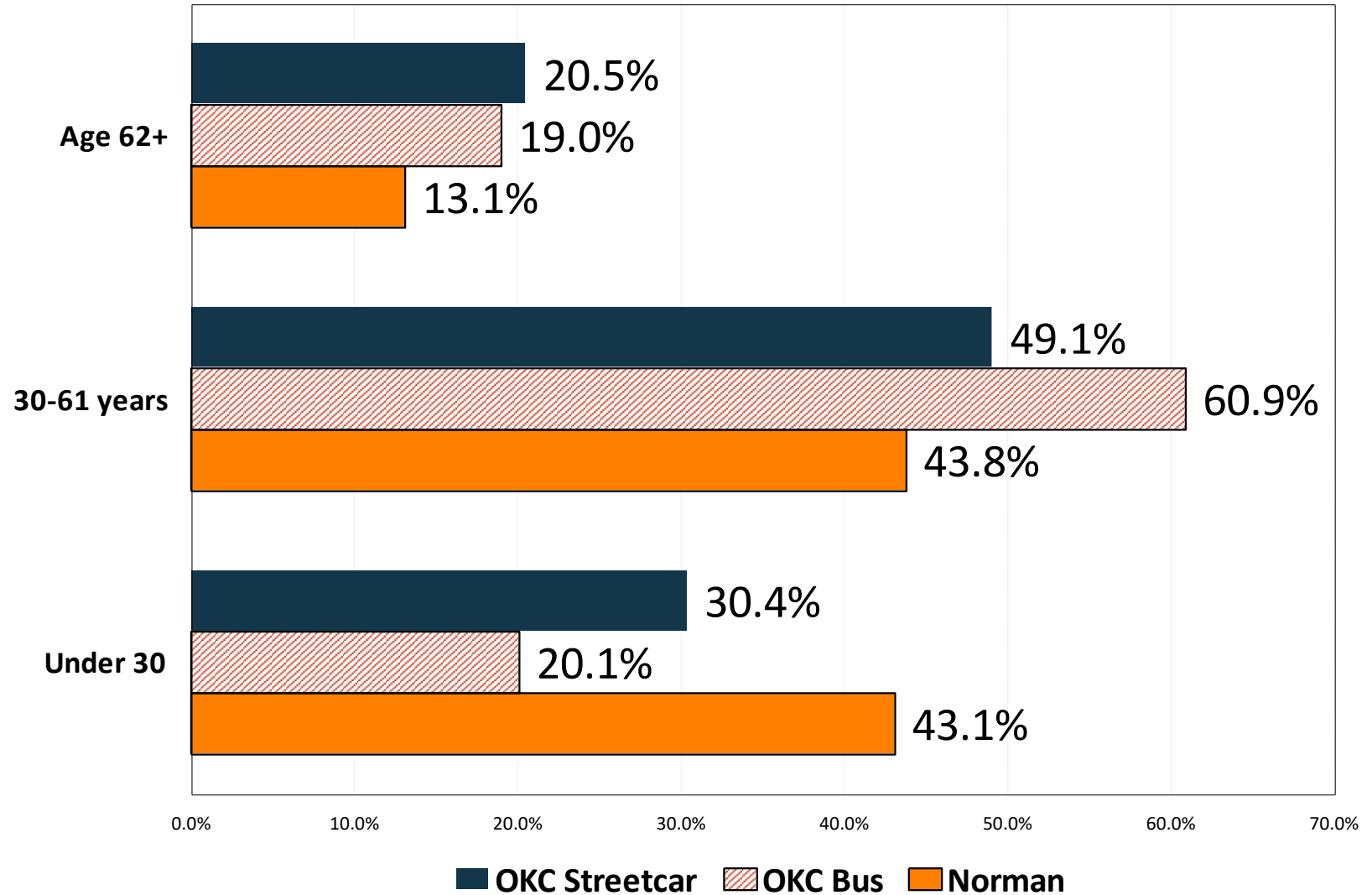*MAJOR FINDINGS: TOPIC #1*
Characteristics of Transit Users

People of All Ages Are Being Served By Embark!

Streetcar Users Are More Likely to Be Under 30 Than Bus Riders in OKC.

Age of Transit Riders

by percentage of riders (excluding "not provided" responses)

Age 62+
- OKC Streetcar: 20.5%
- OKC Bus: 19.0%
- Norman: 13.1%

30-61 years
- OKC Streetcar: 49.1%
- OKC Bus: 60.9%
- Norman: 43.8%

Under 30
- OKC Streetcar: 30.4%
- OKC Bus: 20.1%
- Norman: 43.1%

Legend: ■ OKC Streetcar ▨ OKC Bus ■ Norman
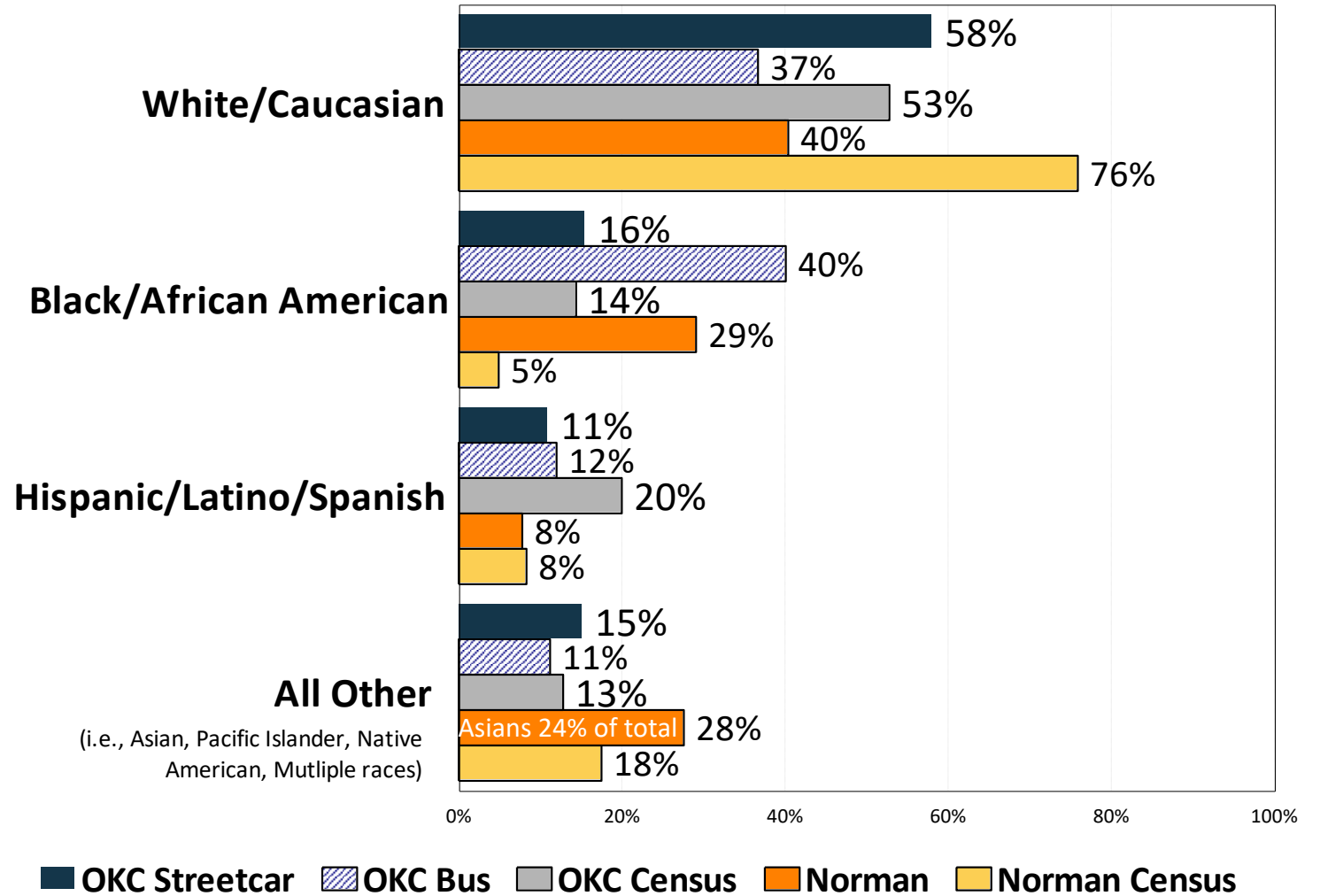
People of All Races Are Using Transit Services in OKC!

African Americans Are Significantly More Likely to Use OKC Bus Services Than all Other Racial Groups.

With the Exception of Hispanics, OKC Streetcar Usage Aligns with the Racial Composition of OKC's population when compared to the Census.

Asians Account for 24% of the Riders in Norman

Do you consider yourself?

by percentage of riders

White/Caucasian
- 58%
- 37%
- 53%
- 40%
- 76%

Black/African American
- 16%
- 40%
- 14%
- 29%
- 5%

Hispanic/Latino/Spanish
- 11%
- 12%
- 20%
- 8%
- 8%

All Other
(i.e., Asian, Pacific Islander, Native American, Mutliple races)
- 15%
- 11%
- 13%
- Asians 24% of total 28%
- 18%

Legend: OKC Streetcar | OKC Bus | OKC Census | Norman | Norman Census

Bus Users Have Significantly Lower Incomes than the General Population.

The Median HH Income for Streetcar Users is Similar to the Census.

Median Household Income

- OKC Bus: $10,000-$19,999 (only 2.7% over $50K)

- OKC Streetcar: More than $50,000

- OKC Census: $56,456

- Norman Bus: $10,000-$19,999 (only 6.2% over $50K)

- Norman Census: $58,111
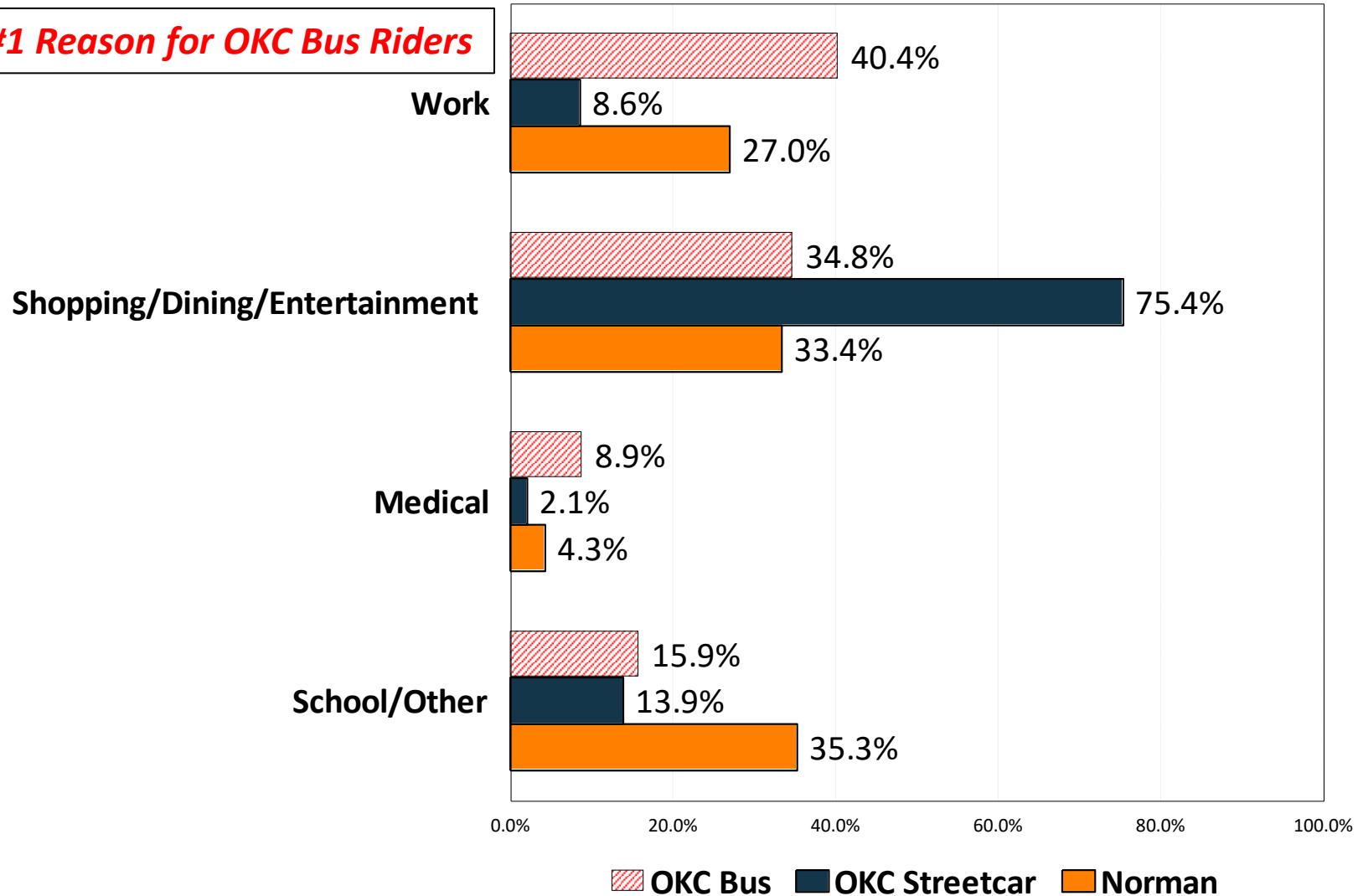
The Majority of Bus Riders in OKC and Norman Use Transit Service on a Daily Basis!

How often do you use the the Bus/Streetcar?

by percentage of riders (excluding "not provided" responses)

Daily
- OKC Streetcar: 10.1%
- OKC Bus: 51.9%
- Norman: 63.8%

Once/Month to 4 Days Per Week
- OKC Streetcar: 27.7%
- OKC Bus: 43.7%
- Norman: 31.4%

< once per month
- OKC Streetcar: 62.2%
- OKC Bus: 4.4%
- Norman: 4.7%

0.0%   10.0%   20.0%   30.0%   40.0%   50.0%   60.0%   70.0%

■ OKC Streetcar   ▨ OKC Bus   ■ Norman
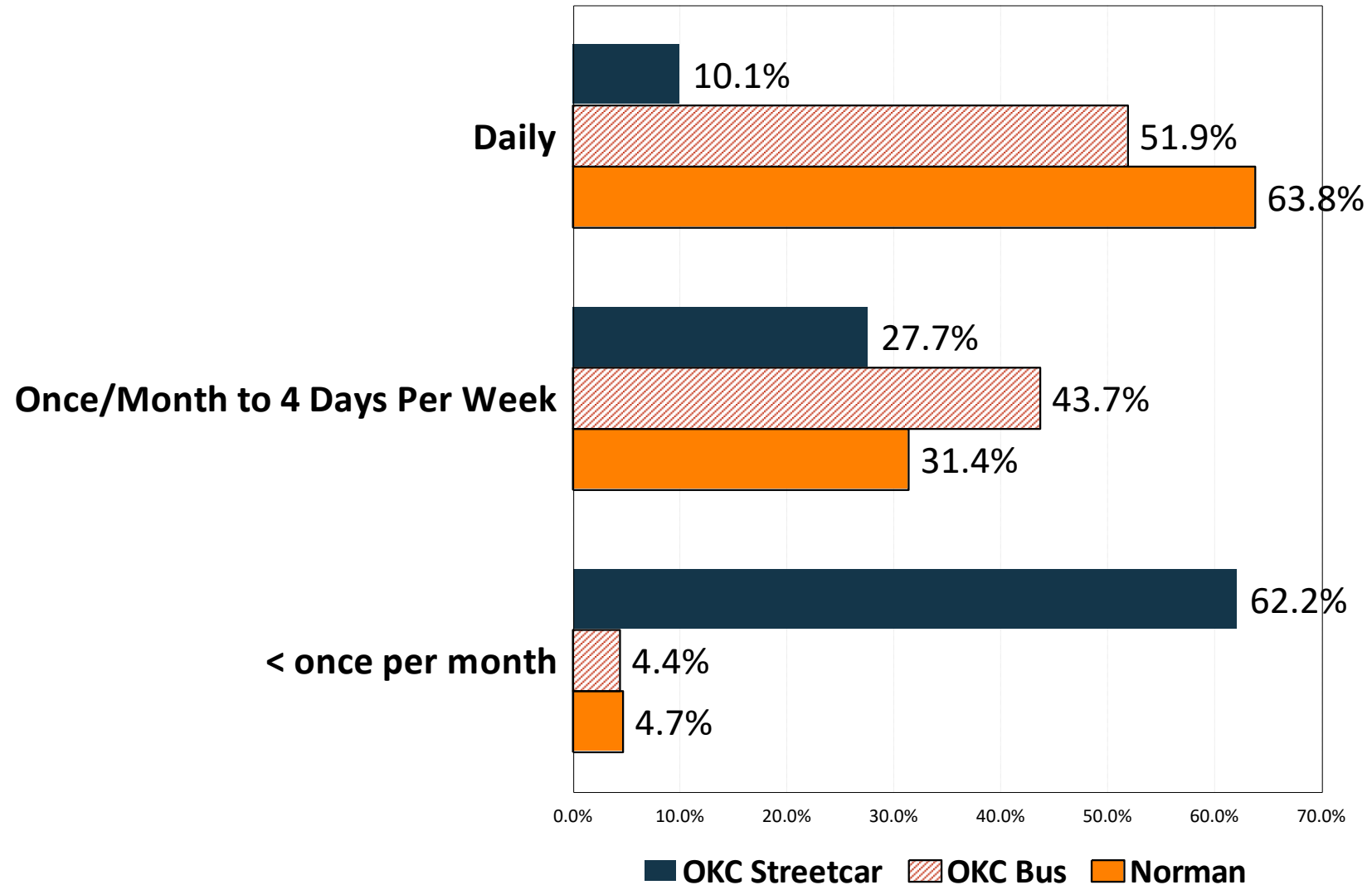
The Frequency of Streetcar Usage Is Lower Because the Majority of Streetcar Riders Are Visitors!

Among Streetcar Riders Who Live in Downtown OKC, 51% Use the Streetcar at least 3-4 Times Per Week.

Which statement best describes you?
[RAIL USERS ONLY]

by percentage of streetcar riders (multiple choices allowed)

I am visiting the downtown area — **67.9%**

I live in the downtown area — **18.7%**

Downtown Residents Are Frequent Users!

I work in the downtown area — **11.9%**

I am attending a convention — **6.0%**

0.0%   20.0%   40.0%   60.0%
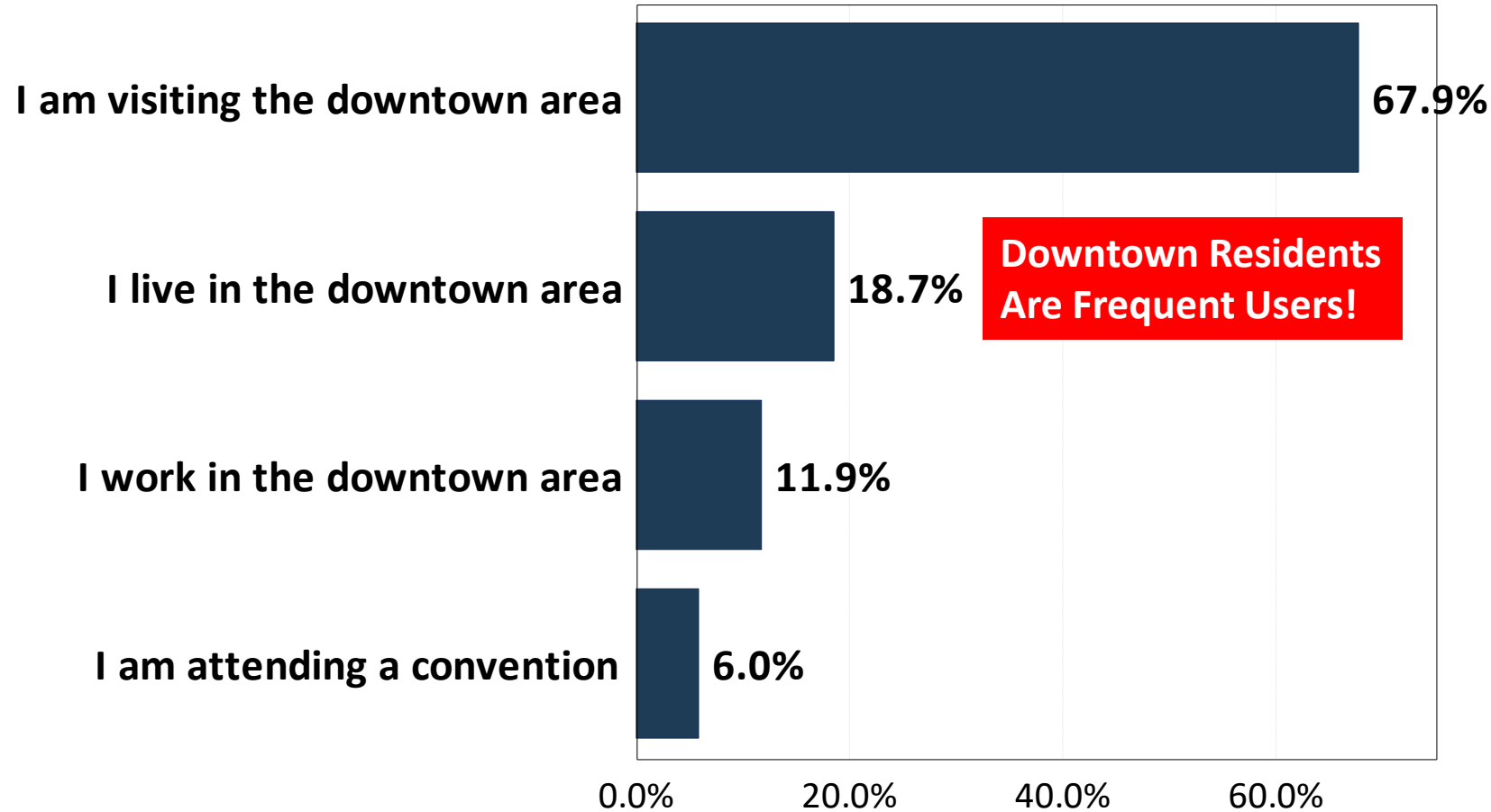
MAJOR FINDINGS: TOPIC #2
Satisfaction with Transit Services

Satisfaction with OKC Bus Service Remains High in All Areas that Were Assessed!

Ratings Changed by more than +/- 4% from 2020-2021 in four areas:

Increases of More than 4%
- Information at bus stops (+4.9%)
- Avail. of accessible stops (+4.6%)

Decreases of More than 4%
- Frequency of service (-5.9%)
- Courtesy of drivers (-5.9%)

Satisfaction with Various OKC BUS Services

by percentage of riders (excluding "don't know" responses)

Service	Satisfaction
Ease of paying your fare	79%
Safe operation of buses	78%
Availability of accessible bus stops	77%
How safe you feel riding this bus route	76%
Cleanliness of transit center	75%
Ease of getting service information	74%
COVID safety precautions/procedures while riding	74%
Ease of locating a bus stop	74%
Information at the bus stop	72%
Cleanliness of buses	72%
Safety at transit center	72%
Safety while waiting at a bus stop	71%
Buses arriving on time	66%
Cleanliness of bus shelters	65%
Frequency of service	64%
Courtesy of drivers	63%

0% 20% 40% 60% 80% 100%

■ Very Satisfied ■ Satisfied

OKC Bus

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Satisfaction with Streetcar Service Is Even Higher!

Ratings Changed by more than +/- 4% from 2020-2021 in four areas:

Increases of More than 4%

- Ease of using ticketing kiosks (+10.1%)
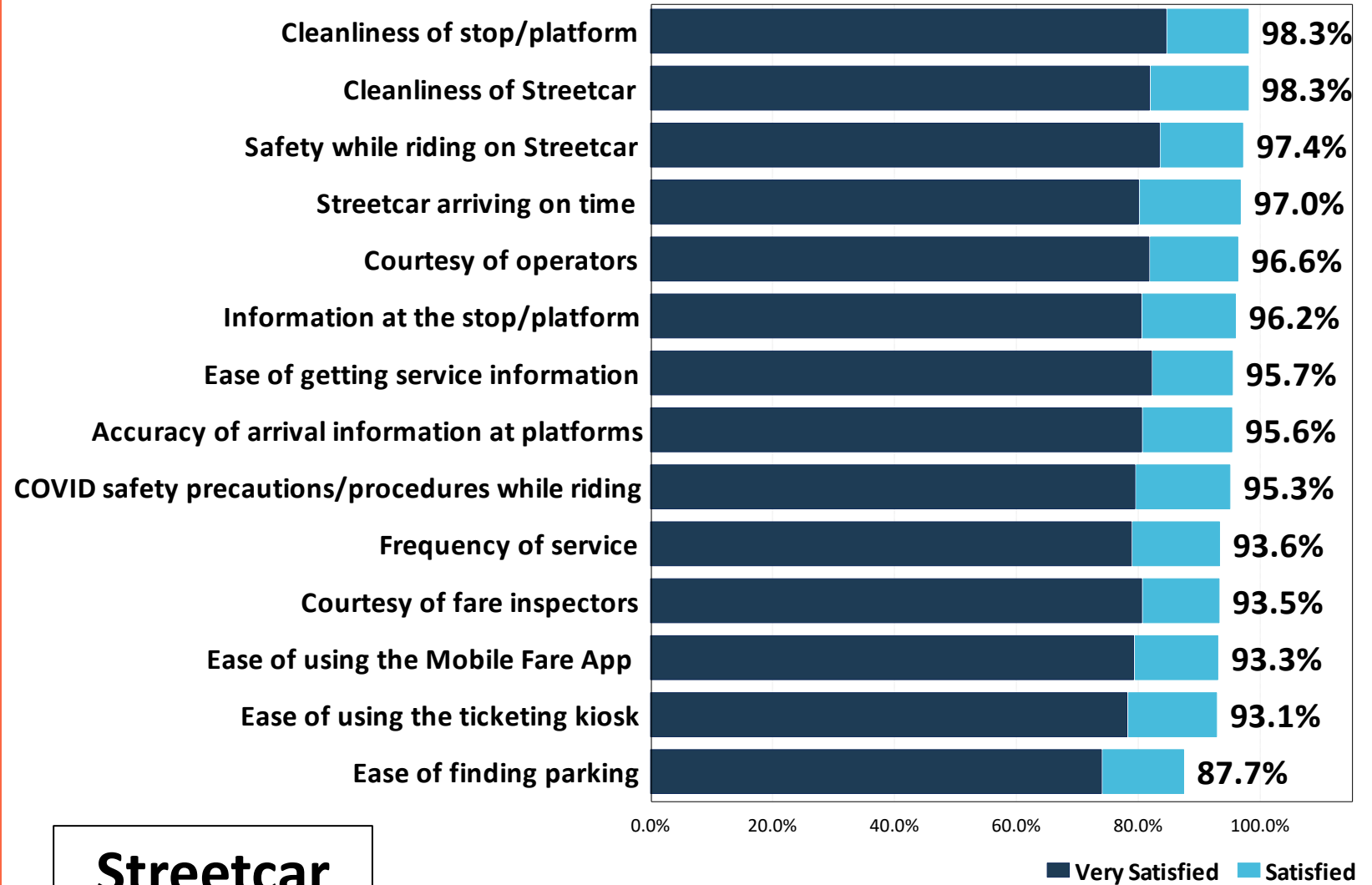- Ease of using Mobile Fare App (+8.3%)
- Ease of getting information (+5.7%)
- Courtesy of fare inspectors (+5.5%)

Decreases of More than 4%

- NONE

Satisfaction with Various __STREETCAR__ Services
by sum percentage of riders (excluding "don't know" responses)

Service	Satisfaction
Cleanliness of stop/platform	98.3%
Cleanliness of Streetcar	98.3%
Safety while riding on Streetcar	97.4%
Streetcar arriving on time	97.0%
Courtesy of operators	96.6%
Information at the stop/platform	96.2%
Ease of getting service information	95.7%
Accuracy of arrival information at platforms	95.6%
COVID safety precautions/procedures while riding	95.3%
Frequency of service	93.6%
Courtesy of fare inspectors	93.5%
Ease of using the Mobile Fare App	93.3%
Ease of using the ticketing kiosk	93.1%
Ease of finding parking	87.7%

0.0%   20.0%   40.0%   60.0%   80.0%   100.0%

Streetcar

■ Very Satisfied   ■ Satisfied

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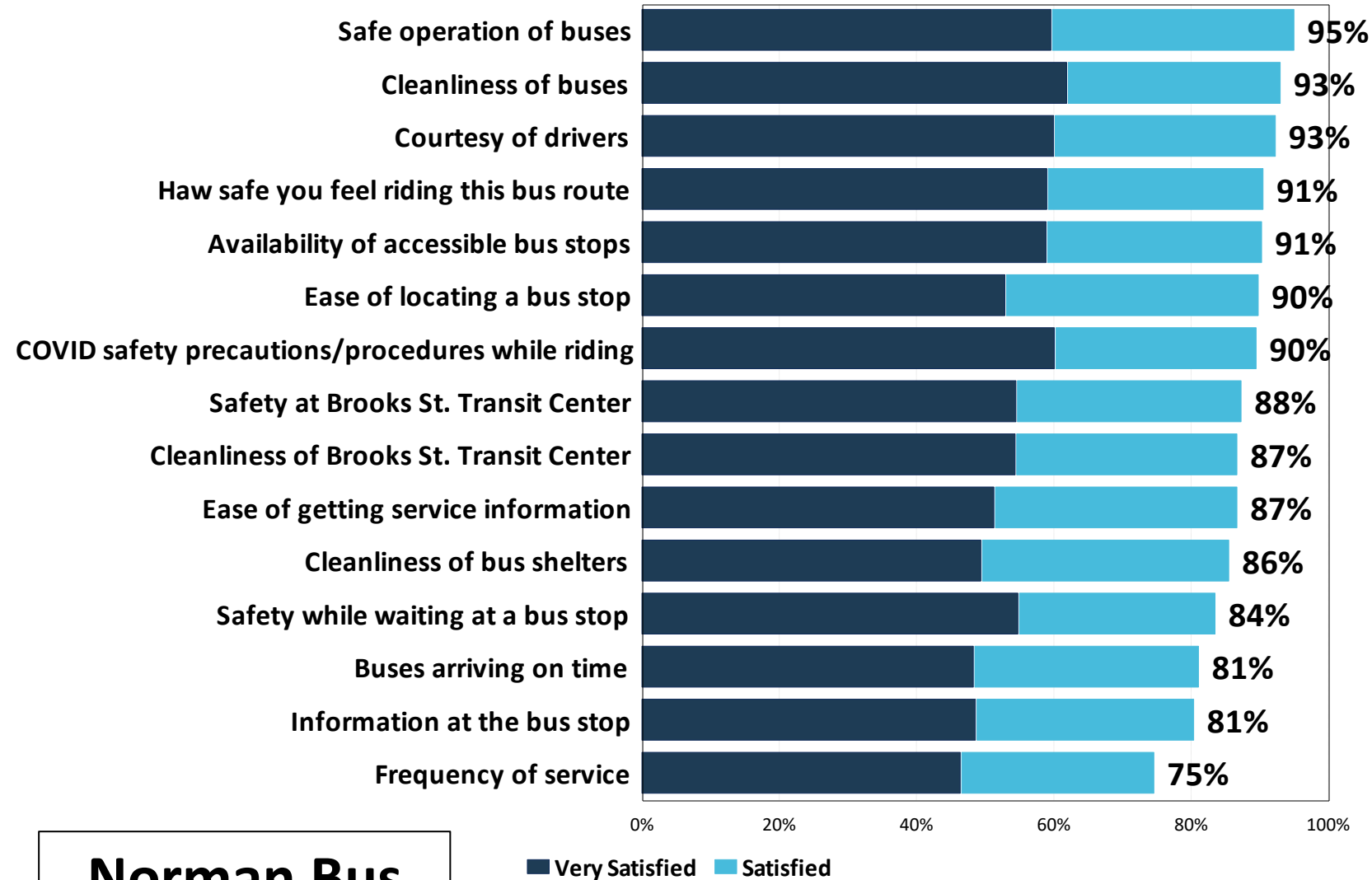# Satisfaction with Norman Bus Improved in 12 of 15 Areas!

Largest Increases
- Ease of getting information (+10.9)
- Avail. of accessible stops (+8.5%)
- COVID safety procedures (+7.7%)
- Safe operation of buses (+7.2%)
- Ease of locating a bus stop (+7.0%)
- Cleanliness of buses (+6.2%)

Decreases
- Safety at bus stops (-4.3%)
- Frequency of service (-8.2%)

Satisfaction with Various Norman BUS Services

by percentage of riders (excluding "don't know" responses)

Service	%
Safe operation of buses	95%
Cleanliness of buses	93%
Courtesy of drivers	93%
How safe you feel riding this bus route	91%
Availability of accessible bus stops	91%
Ease of locating a bus stop	90%
COVID safety precautions/procedures while riding	90%
Safety at Brooks St. Transit Center	88%
Cleanliness of Brooks St. Transit Center	87%
Ease of getting service information	87%
Cleanliness of bus shelters	86%
Safety while waiting at a bus stop	84%
Buses arriving on time	81%
Information at the bus stop	81%
Frequency of service	75%

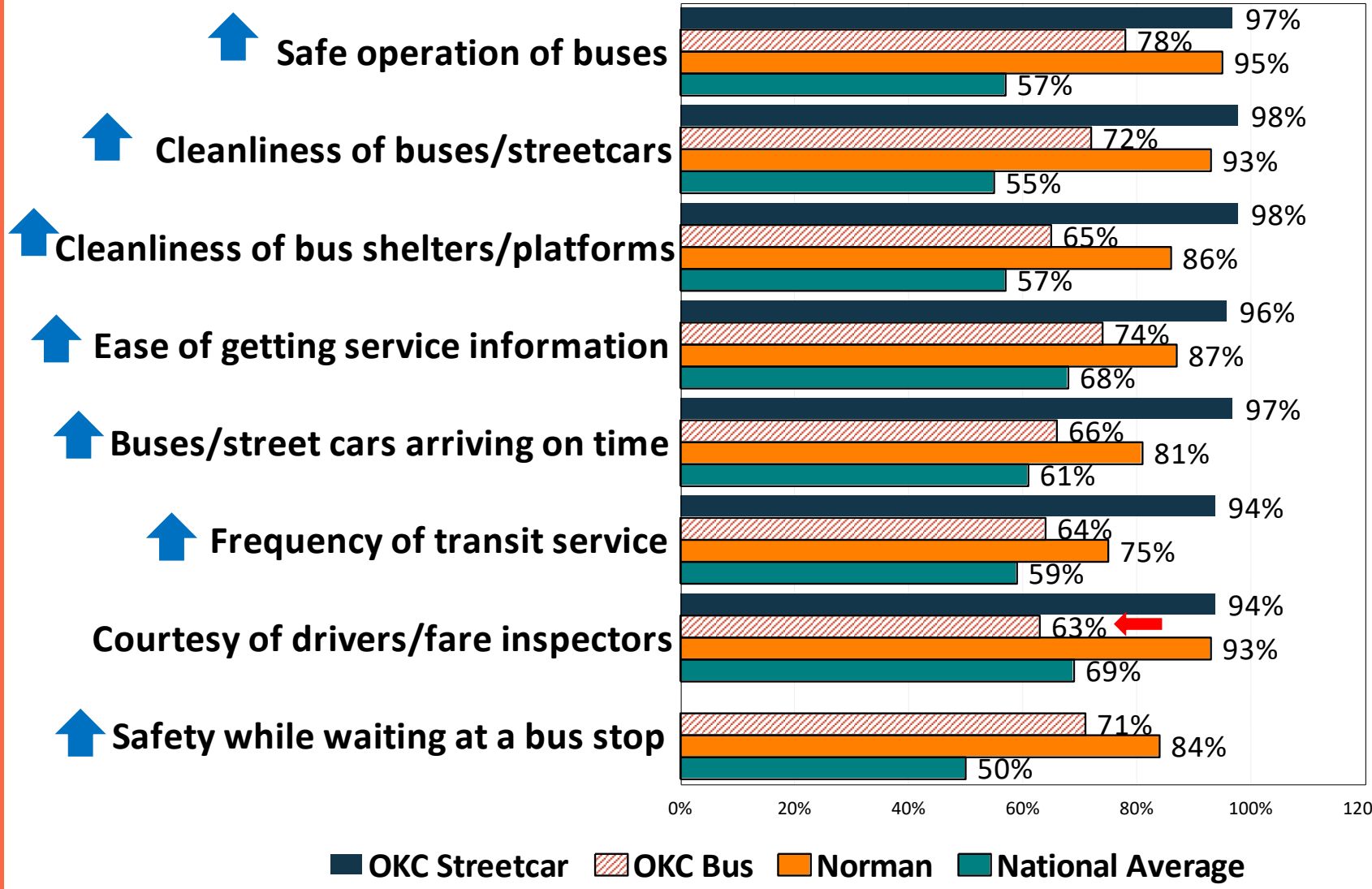0% 20% 40% 60% 80% 100%

■ Very Satisfied ■ Satisfied

Norman Bus

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Embark's Service Is Setting the Standard for Customer Satisfaction in Most Areas!

Courtesy of drivers on OKC Buses was the Only Area Where Embark's Service Rated Below the National Average.

Embark Satisfaction vs. National Average

by percentage of riders (excluding "don't knows")

Safe operation of buses
- OKC Streetcar: 97%
- OKC Bus: 78%
- Norman: 95%
- National Average: 57%

Cleanliness of buses/streetcars
- OKC Streetcar: 98%
- OKC Bus: 72%
- Norman: 93%
- National Average: 55%

Cleanliness of bus shelters/platforms
- OKC Streetcar: 98%
- OKC Bus: 65%
- Norman: 86%
- National Average: 57%

Ease of getting service information
- OKC Streetcar: 96%
- OKC Bus: 74%
- Norman: 87%
- National Average: 68%

Buses/street cars arriving on time
- OKC Streetcar: 97%
- OKC Bus: 66%
- Norman: 81%
- National Average: 61%

Frequency of transit service
- OKC Streetcar: 94%
- OKC Bus: 64%
- Norman: 75%
- National Average: 59%

Courtesy of drivers/fare inspectors
- OKC Streetcar: 94%
- OKC Bus: 63%
- Norman: 93%
- National Average: 69%

Safety while waiting at a bus stop
- OKC Streetcar: 71%
- Norman: 84%
- National Average: 50%

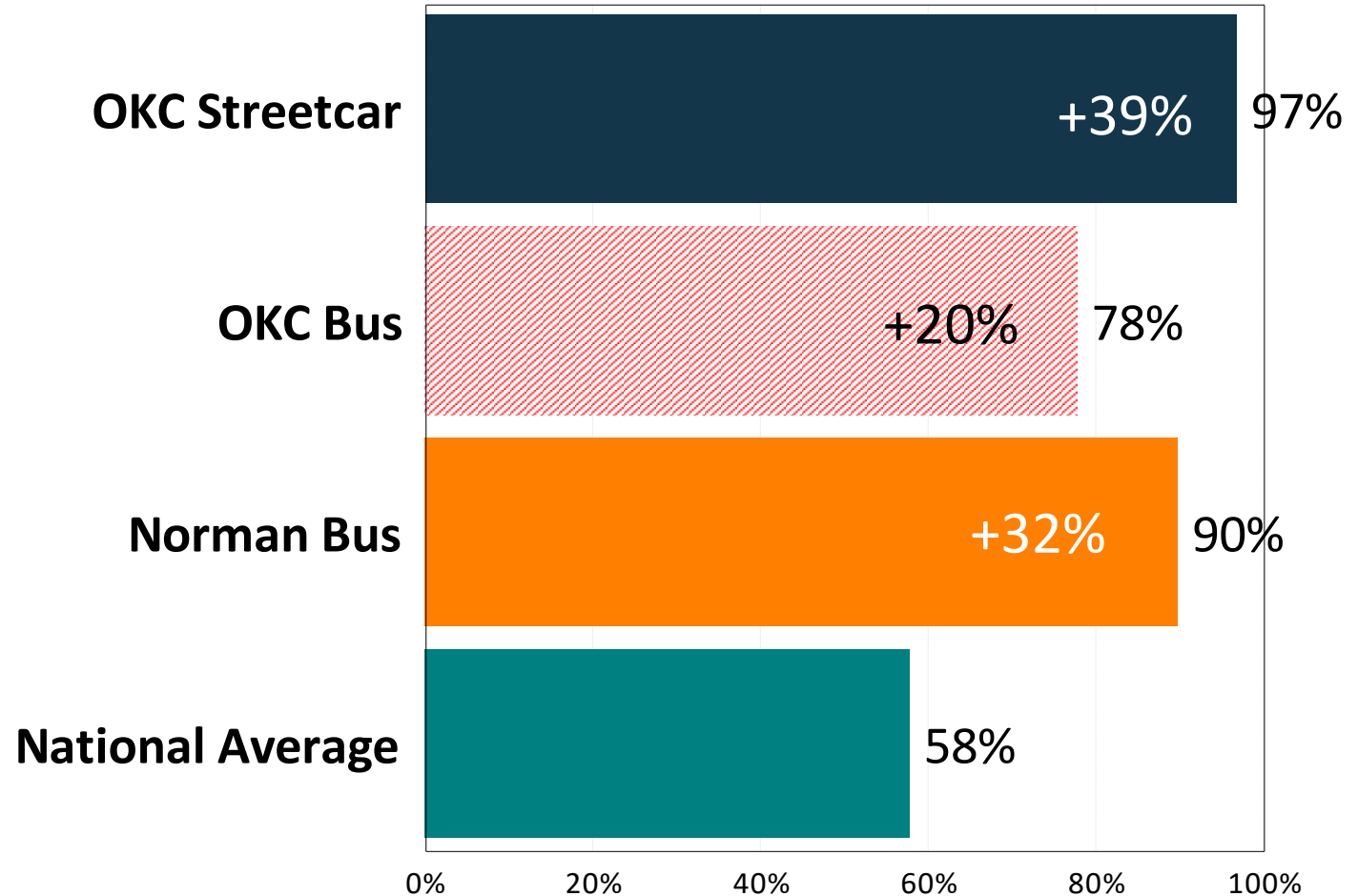Legend: OKC Streetcar | OKC Bus | Norman | National Average

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Overall Satisfaction with the Quality of Service Provided By Embark is Very High!

All Three Services Rated Significantly Above the National Average

Overall Satisfaction with the Quality of Service
Embark Satisfaction vs. National Average

by percentage of riders who were very satisfied or satisfied (excluding "don't knows")

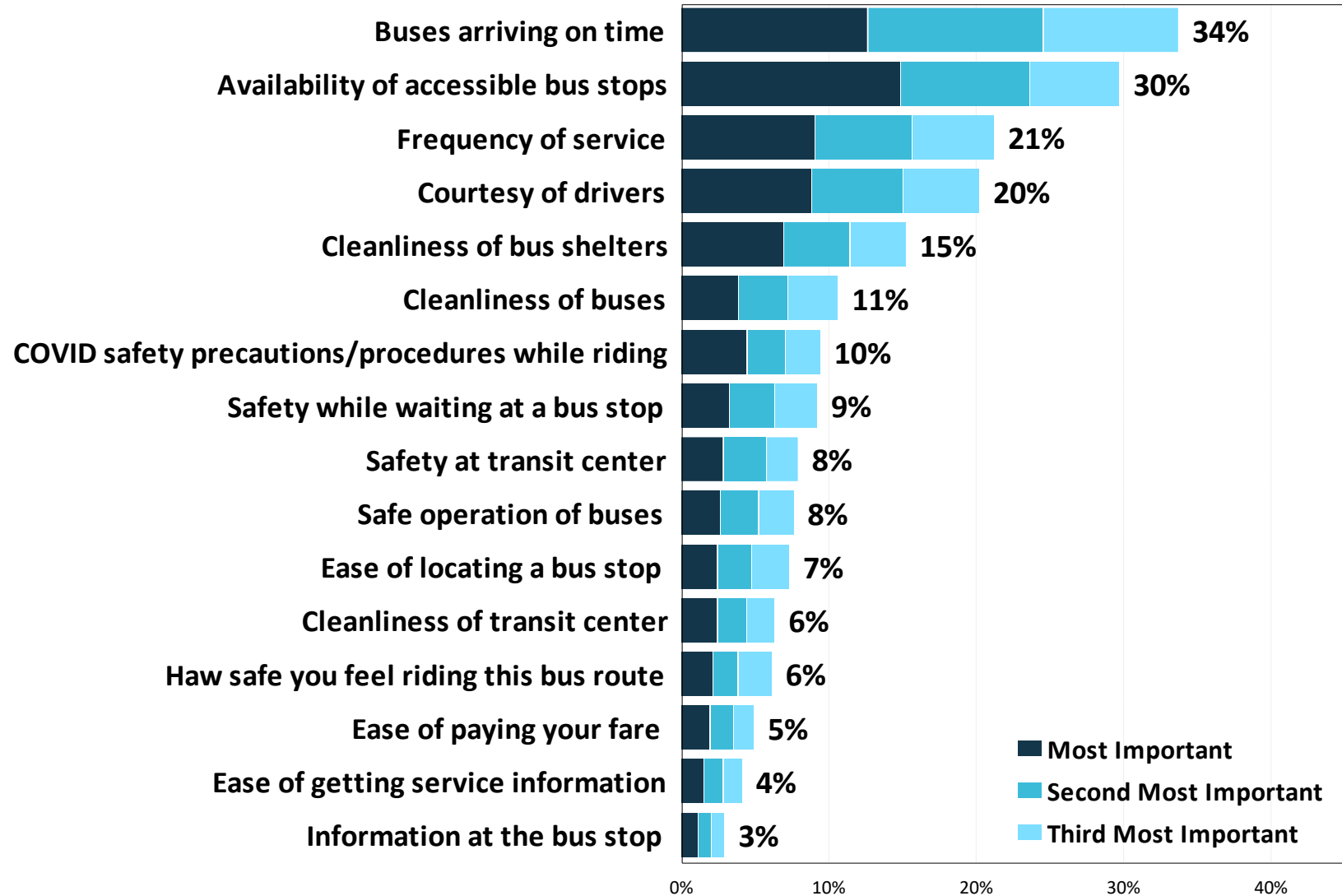| Service	+% vs National	Satisfaction
OKC Streetcar	+39%	97%
OKC Bus	+20%	78%
Norman Bus	+32%	90%
National Average		58%

0%   20%   40%   60%   80%   100%

MAJOR FINDINGS: TOPIC #3

Top Priorities and Opportunities to Improve Transit Services

OKC BUS Service Attributes that Are Most Important to Riders

OKC BUS Service Items That Are Most Important to Riders

by sum percentage of respondents top three choices

Service Item	Percentage
Buses arriving on time	34%
Availability of accessible bus stops	30%
Frequency of service	21%
Courtesy of drivers	20%
Cleanliness of bus shelters	15%
Cleanliness of buses	11%
COVID safety precautions/procedures while riding	10%
Safety while waiting at a bus stop	9%
Safety at transit center	8%
Safe operation of buses	8%
Ease of locating a bus stop	7%
Cleanliness of transit center	6%
Haw safe you feel riding this bus route	6%
Ease of paying your fare	5%
Ease of getting service information	4%
Information at the bus stop	3%

Legend:
- Most Important
- Second Most Important
- Third Most Important

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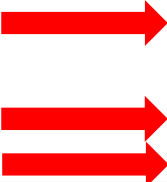## Importance-Satisfaction Analysis
EMBARK Transit Rider Survey (2021)
City of Oklahoma City, OK
Major Categories of Services

Embark Should Continue Emphasize the Highest Rated Areas to Sustain High Satisfaction Ratings in the Future.

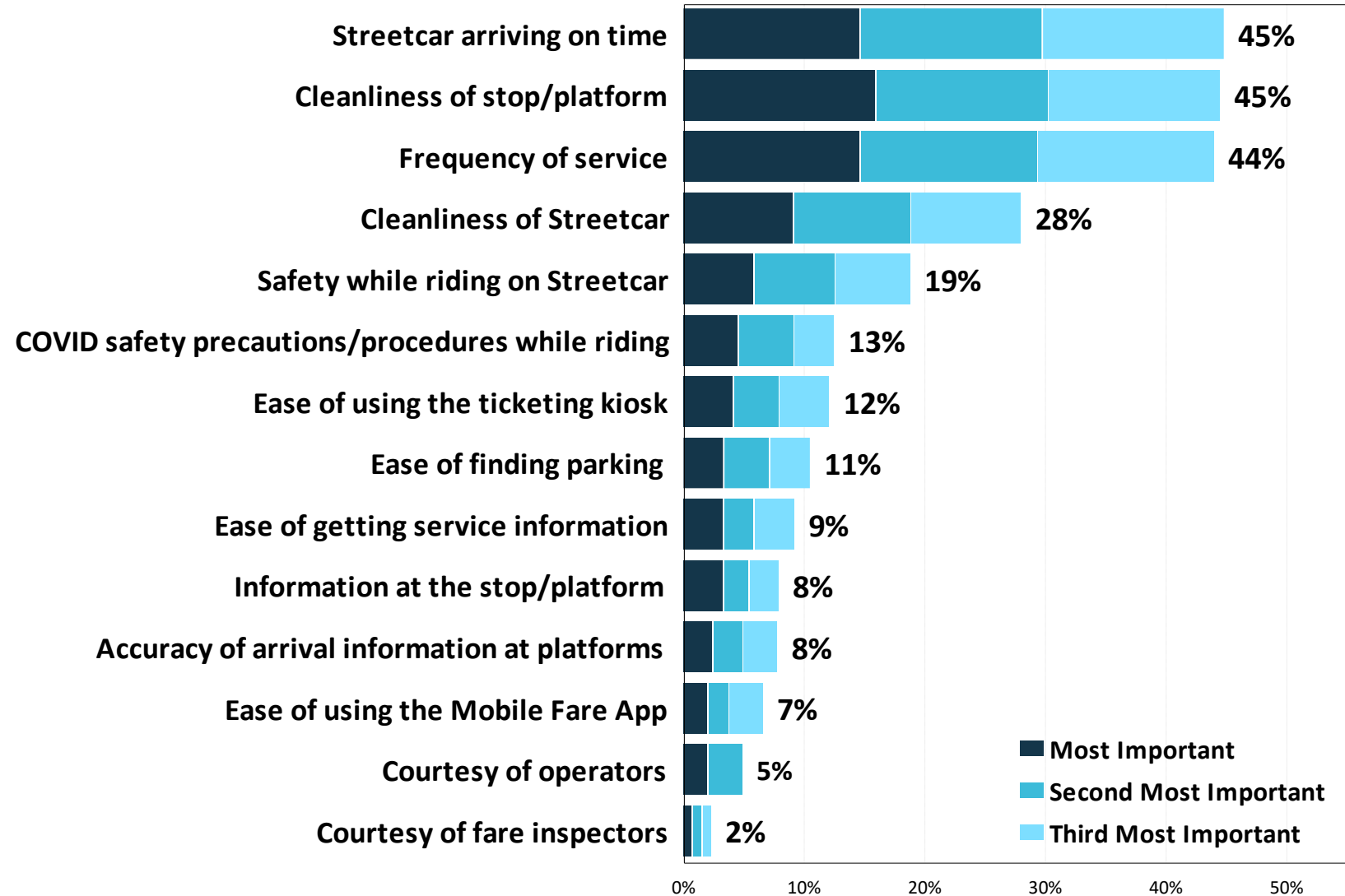| Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
High Priority (I-S = 0.10-0.20)						
Buses arriving on time	34%	1	66%	13	0.1153	1
Medium Priority (I-S < 0.10)						
Frequency of service	21%	3	64%	15	0.0765	2
Courtesy of drivers	20%	4	63%	16	0.0749	3
Availability of accessible bus stops	30%	2	77%	3	0.0697	4
Cleanliness of bus shelters	15%	5	65%	14	0.0536	5
Cleanliness of buses	11%	6	72%	10	0.0302	6
Safety while waiting at a bus stop	9%	8	71%	12	0.0272	7
COVID safety precautions/procedures while riding	10%	7	74%	7	0.0250	8
Safety at transit center	8%	9	72%	11	0.0226	9
Ease of locating a bus stop	7%	11	74%	8	0.0195	10
Safe operation of buses	8%	10	78%	2	0.0173	11
Cleanliness of transit center	6%	12	75%	5	0.0163	12
How safe you feel riding this bus route	6%	13	76%	4	0.0151	13
Ease of getting service information	4%	15	74%	6	0.0108	14
Ease of paying your fare	5%	14	79%	1	0.0104	15
Information at the bus stop	3%	16	72%	9	0.0084	16

Top 6 Opportunities for Improvement

Cleanliness/Driver Courtesy Are Lower Cost Opportunities for Improvement with Potentially High Returns!

Streetcar Service Attributes that Are Most Important to Riders

Streetcar Service Items That Are Most Important to Riders

by sum percentage of respondents top three choices

Service Item	Percentage
Streetcar arriving on time	45%
Cleanliness of stop/platform	45%
Frequency of service	44%
Cleanliness of Streetcar	28%
Safety while riding on Streetcar	19%
COVID safety precautions/procedures while riding	13%
Ease of using the ticketing kiosk	12%
Ease of finding parking	11%
Ease of getting service information	9%
Information at the stop/platform	8%
Accuracy of arrival information at platforms	8%
Ease of using the Mobile Fare App	7%
Courtesy of operators	5%
Courtesy of fare inspectors	2%

Legend:
- Most Important
- Second Most Important
- Third Most Important

Importance-Satisfaction Analysis
EMBARK Streetcar Survey (2021)
City of Oklahoma City, OK

Embark Should Continue Emphasize the Highest Rated Areas to Sustain High Satisfaction Ratings in the Future.

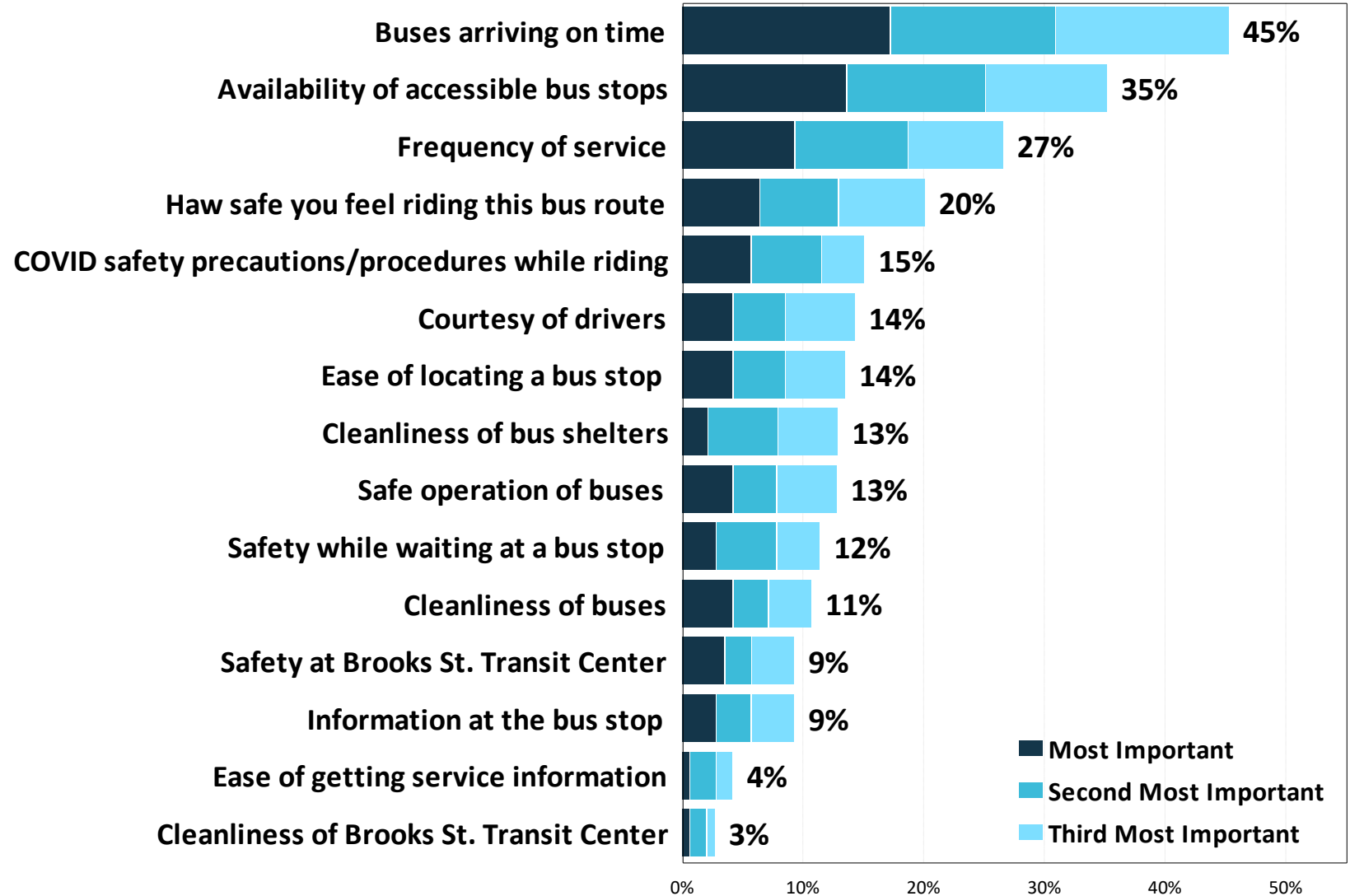| Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank	
Medium Priority (I-S < 0.10)							
Frequency of service	44%	3	94%	10	0.0282	1	Top 6 Opportunities for Improvement
Streetcar arriving on time	45%	1	97%	4	0.0135	2	
Ease of finding parking	11%	8	88%	14	0.0130	3	
Ease of using the ticketing kiosk	12%	7	93%	13	0.0084	4	
Cleanliness of stop/platform	45%	2	98%	1	0.0076	5	
COVID safety procedures	13%	6	95%	9	0.0059	6	
Safety while riding on Streetcar	19%	5	97%	3	0.0049	7	
Cleanliness of Streetcar	28%	4	98%	2	0.0048	8	
Ease of using the Mobile Fare App (Token Transit)	7%	12	93%	12	0.0045	9	
Ease of getting service information	9%	9	96%	7	0.0040	10	
Accuracy of arrival information at platforms	8%	11	96%	8	0.0035	11	
Information at the stop/platform	8%	10	96%	6	0.0030	12	
Courtesy of operators	5%	13	97%	5	0.0017	13	
Courtesy of fare inspectors	2%	14	94%	11	0.0016	14	

Cleanliness is a Lower Cost Opportunity for Improvement with Potentially High Returns!

Norman BUS Service Attributes that Are Most Important to Riders

Norman Bus Service Items That Are Most Important to Riders

by sum percentage of respondents top three choices

Service Item	Percentage
Buses arriving on time	45%
Availability of accessible bus stops	35%
Frequency of service	27%
Haw safe you feel riding this bus route	20%
COVID safety precautions/procedures while riding	15%
Courtesy of drivers	14%
Ease of locating a bus stop	14%
Cleanliness of bus shelters	13%
Safe operation of buses	13%
Safety while waiting at a bus stop	12%
Cleanliness of buses	11%
Safety at Brooks St. Transit Center	9%
Information at the bus stop	9%
Ease of getting service information	4%
Cleanliness of Brooks St. Transit Center	3%

Legend: Most Important, Second Most Important, Third Most Important

EMBARK Onboard Survey - Norman

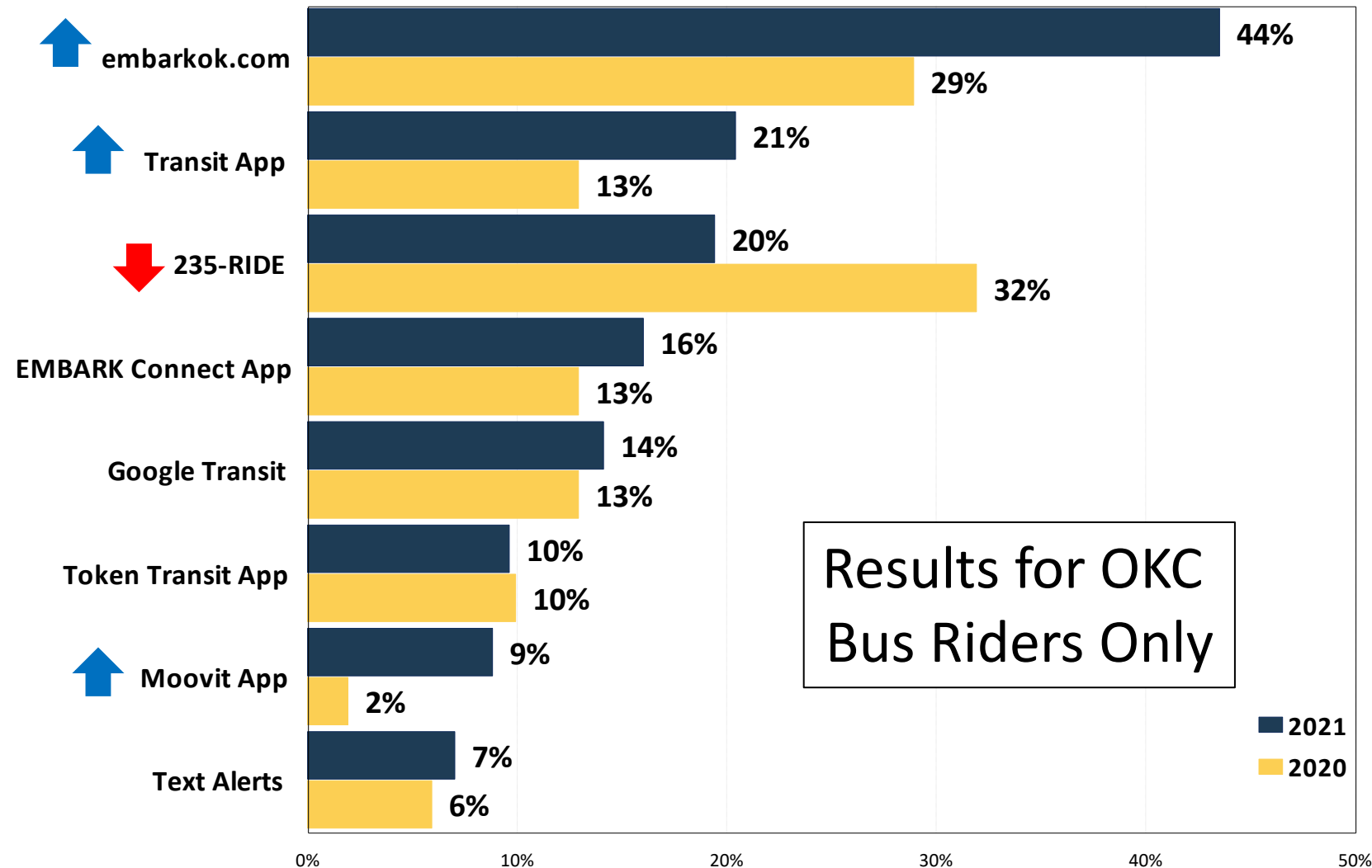| Category of Service	Top 6 Opportunities for Improvement	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank	
Medium Priority (IS < 0.10)								
Buses arriving on time		45%	1	78%	14	0.0975	1	
Availability of accessible bus stops		39%	2	81%	10	0.0735	2	
Frequency of service		36%	3	83%	8	0.0603	3	Top 6 Opportunities for Improvement
Information at the bus stop		18%	5	80%	13	0.0369	4	
Cleanliness of buses		16%	6	87%	5	0.0198	5	
Ease of getting service information		8%	8	77%	15	0.0196	6	
Courtesy of drivers		19%	4	90%	1	0.0194	7	
Safety while waiting at a bus stop		11%	7	88%	4	0.0134	8	
Cleanliness of bus shelters		6%	10	80%	12	0.0122	9	
Ease of locating a bus stop		7%	9	83%	7	0.0122	10	
Safety at transit center		5%	11	86%	6	0.0064	11	
Safe operation of buses		4%	12	88%	3	0.0043	12	
Cleanliness of transit center		2%	13	81%	11	0.0029	13	
How safe you feel riding this bus route		2%	14	89%	2	0.0016	14	
COVID safety precautions/procedures while riding		0%	15	82%	9	0.0000	15	

TOPIC #4

Other Findings

Usage of embarkok.com Has Increased Significantly!

Usage of the Moovit and Transit Apps Has Also Increased Since 2020.

Q9. Have you used any of these rider tools?

by percentage of riders (multiple choices could be selected) (excluding "none selected" responses)

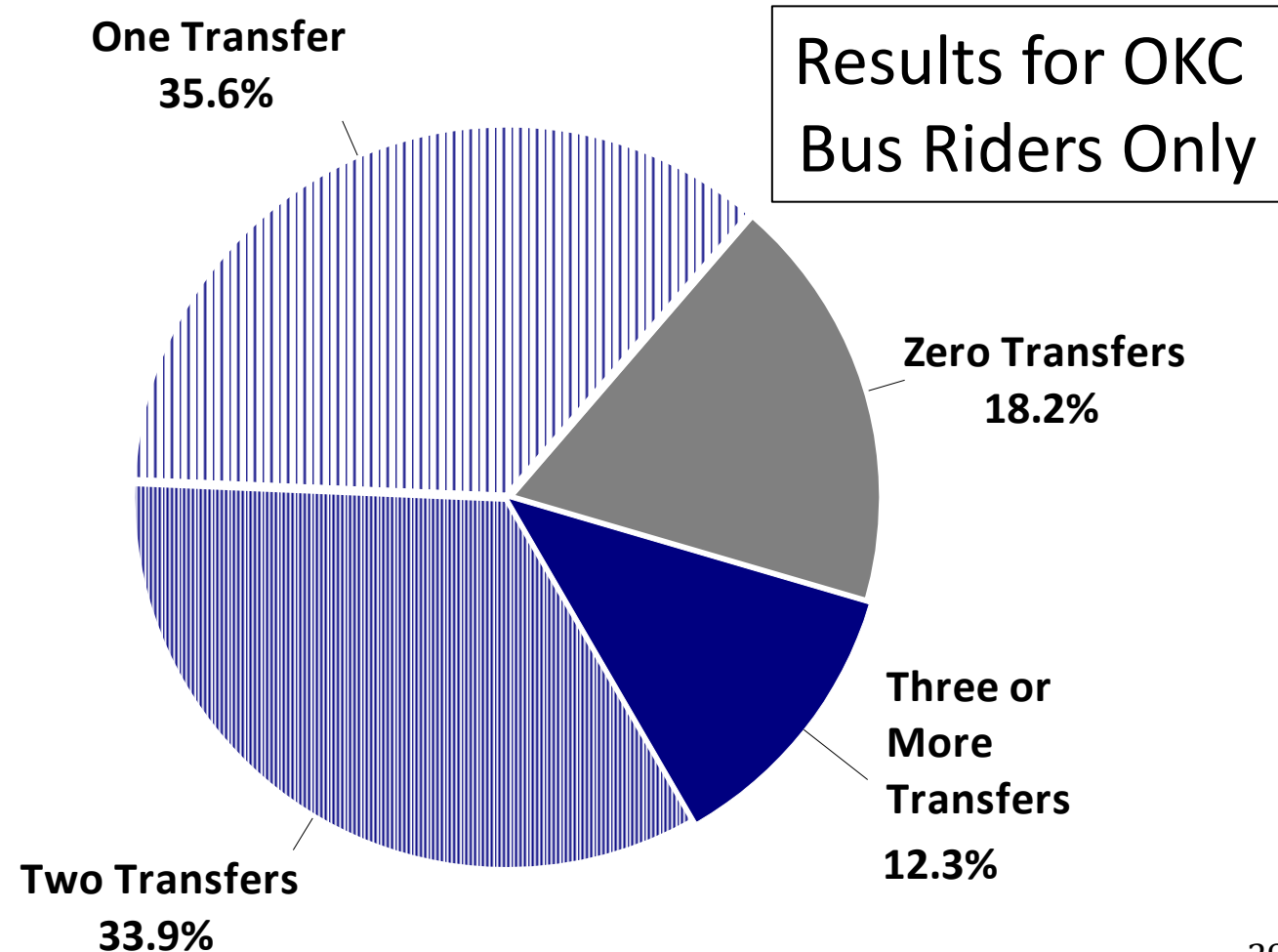| Tool	2021	2020
embarkok.com	44%	29%
Transit App	21%	13%
235-RIDE	20%	32%
EMBARK Connect App	16%	13%
Google Transit	14%	13%
Token Transit App	10%	10%
Moovit App	9%	2%
Text Alerts	7%	6%

Results for OKC Bus Riders Only

■ 2021
■ 2020

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Nearly Half of OKC Bus Users in OKC Make at Least Two Transfers

Fewer than 1 in 5 Bus Riders Reported Zero Transfers.

For the trip you are currently on, how many transfers will you make to reach your destination?

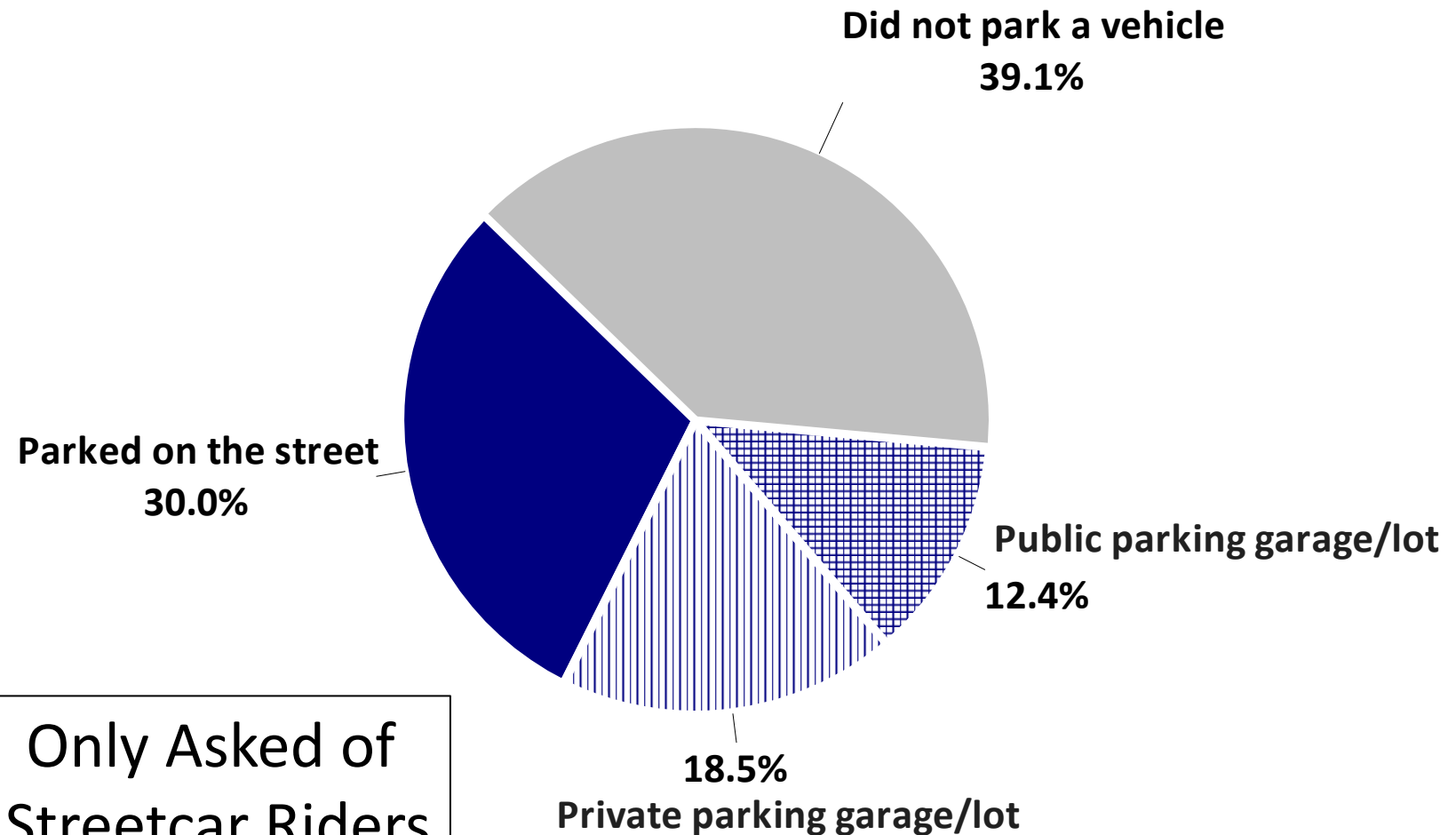by percentage of riders (excluding "not provided" responses)

One Transfer
35.6%

Results for OKC Bus Riders Only

Zero Transfers
18.2%

Three or More Transfers
12.3%

Two Transfers
33.9%

Nearly 6 in 10 Streetcar Users Park a Car.

Half of Those Who Parked a Car Did so on the Street.

Only Asked of Streetcar Riders

If you drove, or rode with others in a vehicle today, where did you park?

by percentage of riders (excluding "not provided" responses)

Did not park a vehicle
39.1%

Parked on the street
30.0%

Public parking garage/lot
12.4%

18.5%
Private parking garage/lot

Interest in Extending the Streetcar to Uptown Has Increased While Interest in Extending It to Capitol Hill Has Decreased.

If the Streetcar could be extended to other areas, which area would you like to see it extended to?

by percentage of riders (excluding "not provided" responses)

Uptown (NW 23)
- 2021: 37.5%
- 2020: 31.3%

Plaza District
- 2021: 23.4%
- 2020: 21.1%

Capitol Hill (S. OKC)
- 2021: 18.2%
- 2020: 23.1%

OUHSC
- 2021: 10.4%
- 2020: 10.9%

Only Asked of Streetcar Riders

2021
2020

0.0%   10.0%   20.0%   30.0%   40.0%   50.0%

31
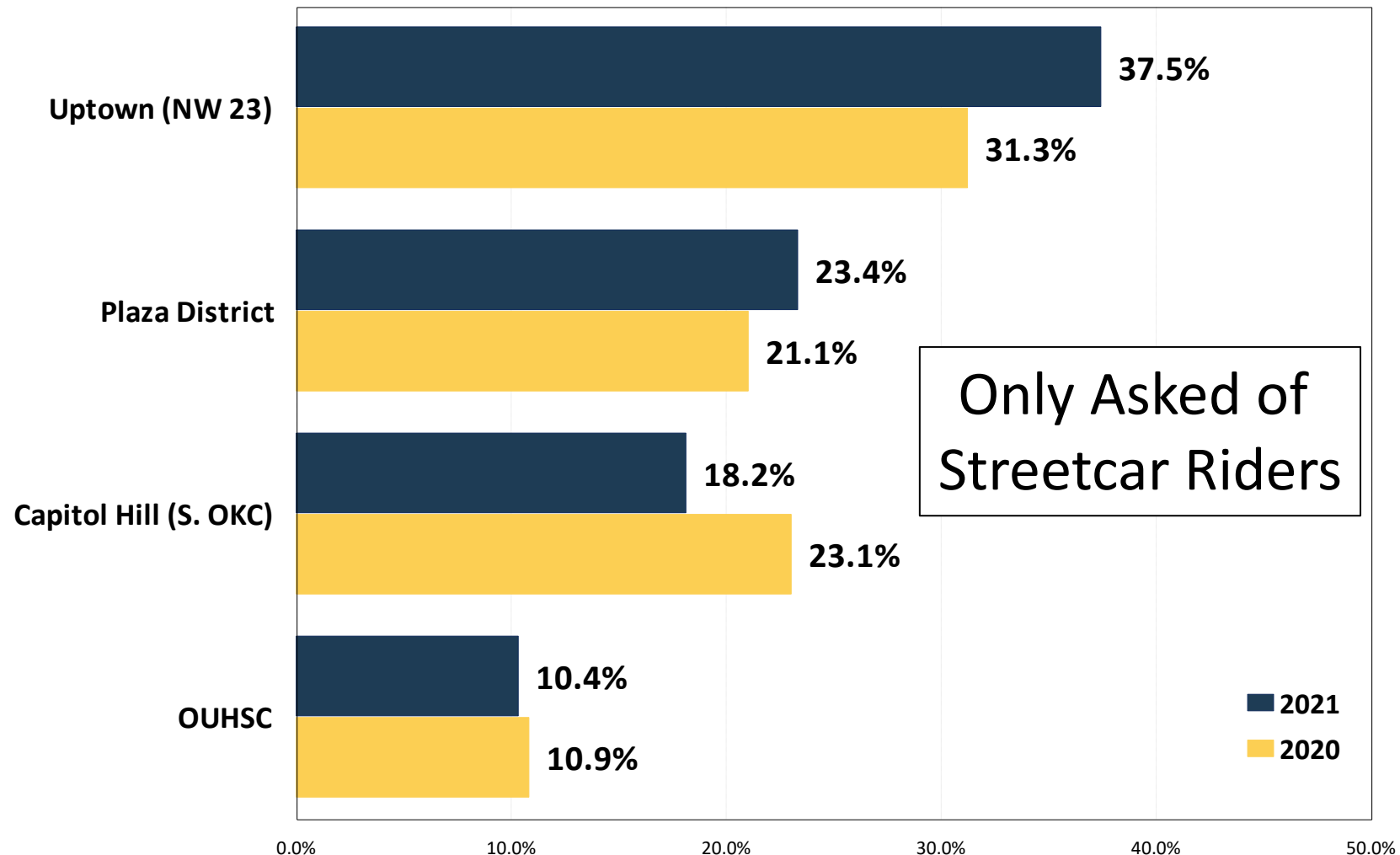
Summary

Summary

- **Embark is setting the standard when it comes to providing riders with an excellent customer experience!**
  - ➢ Streetcar satisfaction is 39% above the National Average
  - ➢ OKC Bus satisfaction is 20% above the National Average
  - ➢ Norman Bus satisfaction is 32% above the National Average

- **Satisfaction has stayed the same or improved in most areas over the past year**
  - ➢ Of the 14 <u>Streetcar</u> attributes rated, four areas increased by more than 4%; no areas decreased by more than 4%
  - ➢ Of the 16 <u>OKC Bus</u> attributes rated, two areas increased by more than 4% and two decreased by more than 4%
  - ➢ Of the 15 <u>Norman Bus</u> attributes rated, satisfaction increased in 13 areas

- **The Importance-Satisfaction analysis should be used to guide opportunities for improved**
  - ➢ Embark should emphasize its efforts in lower cost opportunities that have high I-S ratings, such as cleanliness and driver courtesy on OKC buses.

QUESTIONS?

Thank You!