

Survey Findings



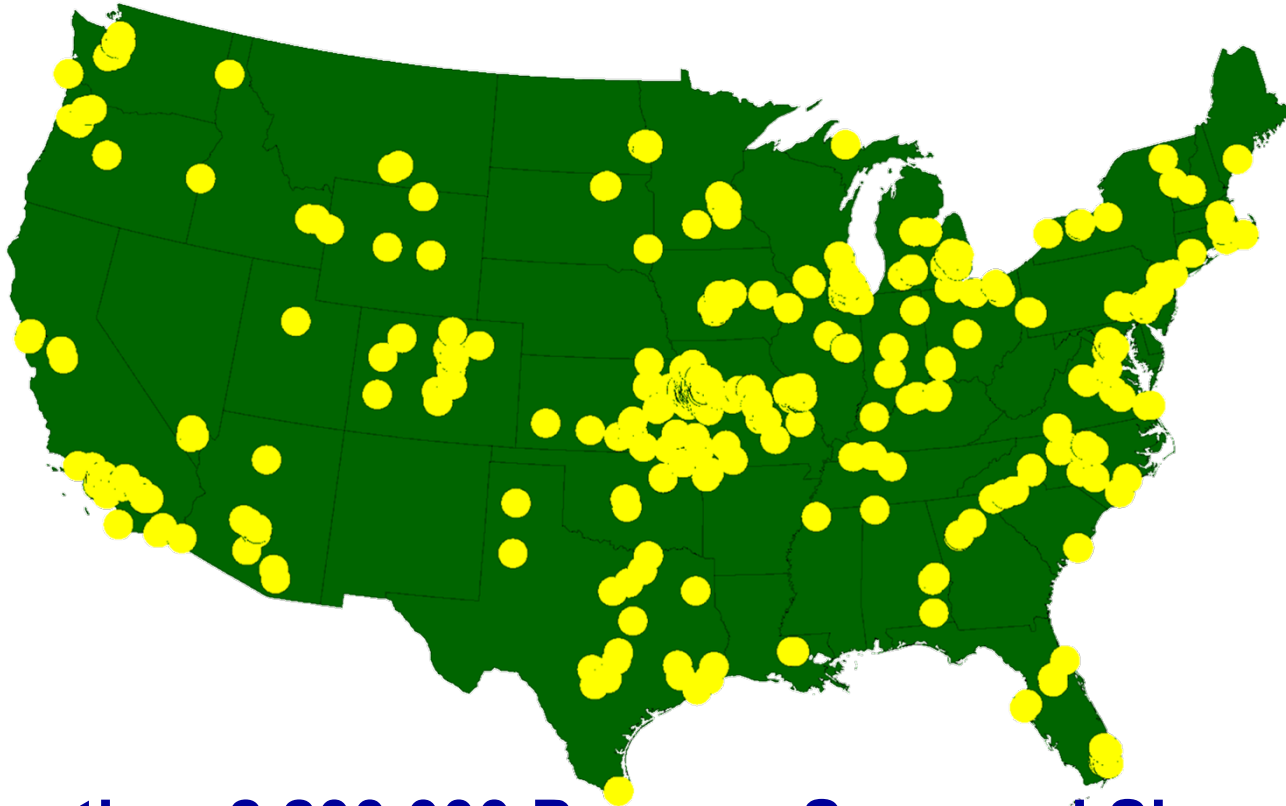
Presented to
**EMBARK and
City of OKC**
By
ETC Institute

July 2021

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**More than 2,200,000 Persons Surveyed Since 2006
for more than 900 cities in 49 States**

Agenda

- **Non-Rider Survey Findings**
- **Rider Survey Findings**
- **Transit Summary**
- **Questions**

Non-Rider Survey

Purpose of the Survey

- **Assess the perceived importance of transit in the community among those who don't use transit**
- **Measure awareness of EMBARK and familiarity with the services provided**
- **Determine if non-riders would consider using transit and if so,**
 - **What service characteristics are most important**

Methodology

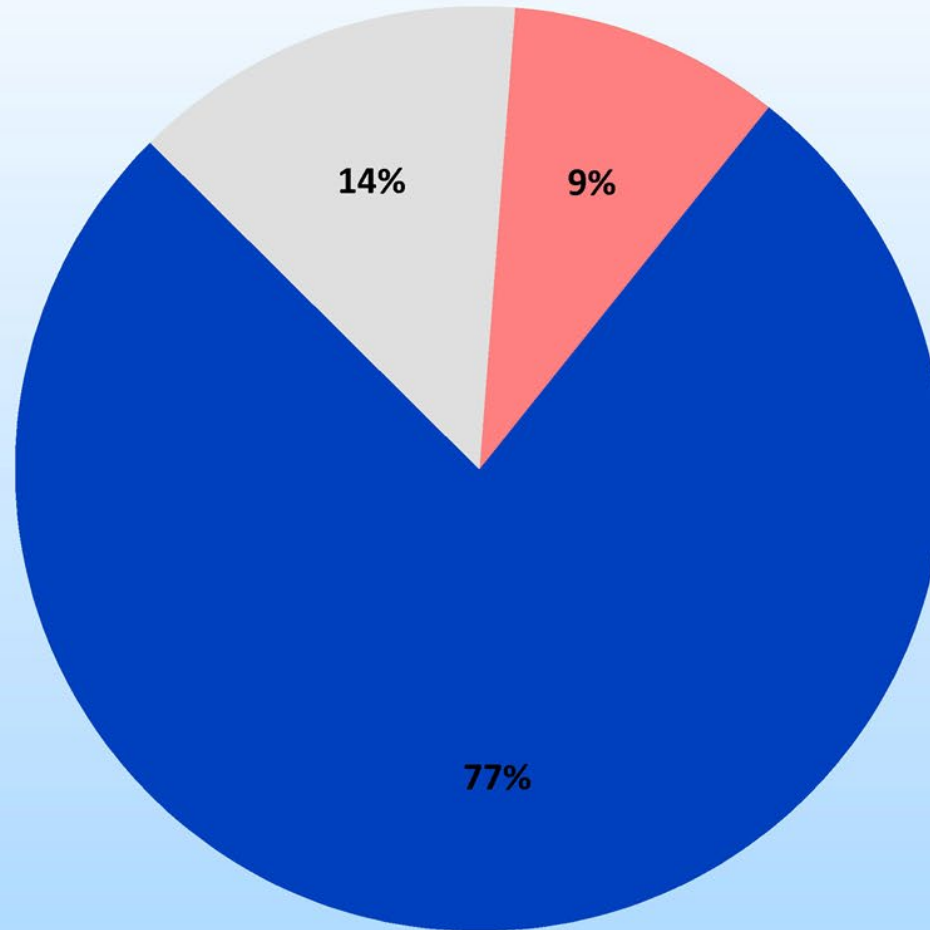
- Surveys were conducted during the winter of 2020
- Administered by email and mail to 1,275 residents in EMBARK's service area: 973 in Oklahoma City and 302 in Norman
- Overall results have a precision of at least +/- 2.7% at the 95% level of confidence.

Findings from the Non-Rider Survey

Public Transit Is a High Priority to Residents

Q3. Do you feel that EMBARK's public transit services are valuable to the community?

by percentage of respondents

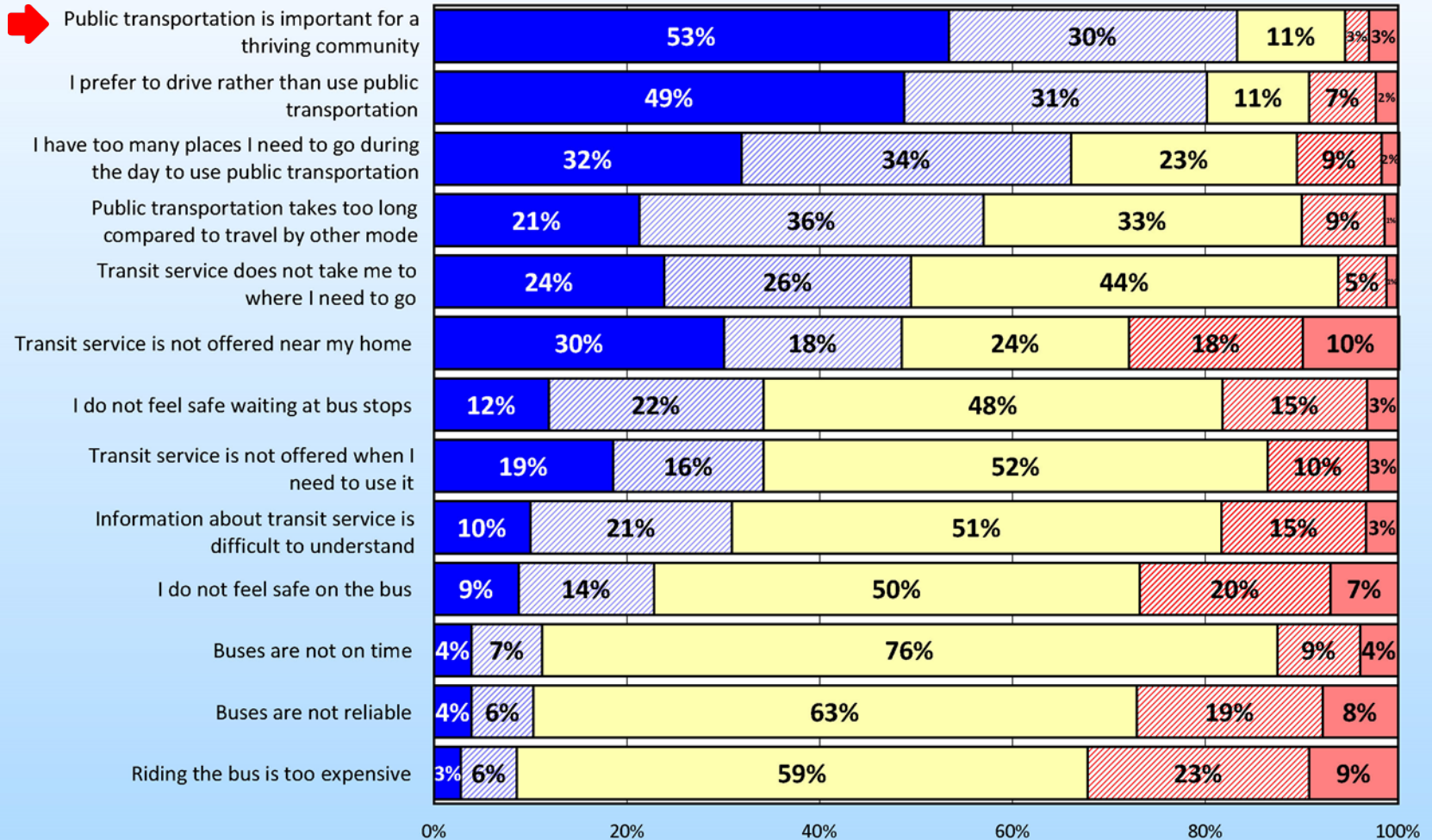


Source: ETC Institute (2020)

■ Yes ■ No ■ Don't know

Q5. Level of Agreement with Various Statements About Public Transportation in the Region

by percentage of respondents using a 5-point scale where 5 means Strongly Agree and 1 means Strongly Disagree (without "not provided")

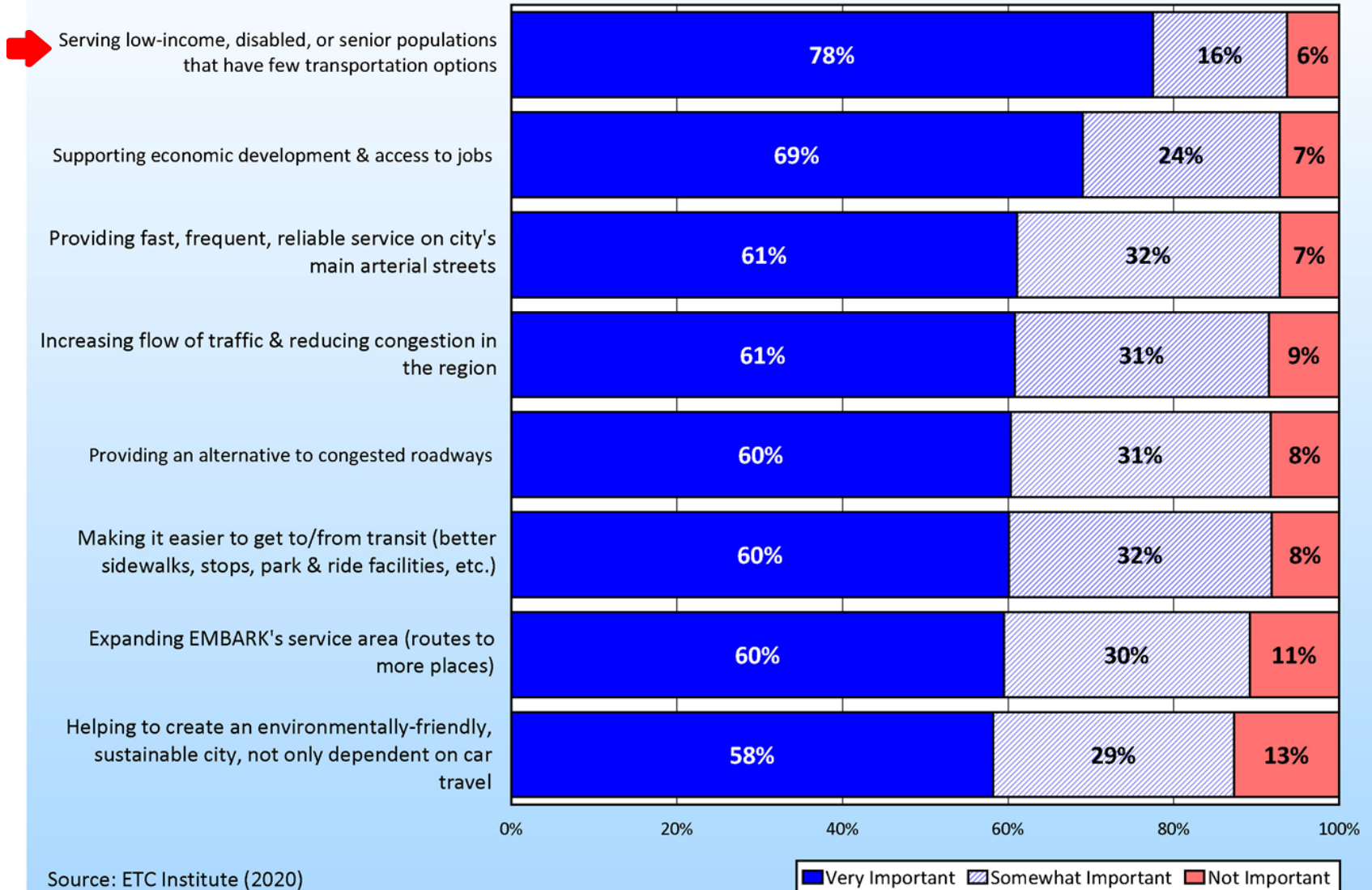


Source: ETC Institute (2020)

Strongly Agree Agree Neutral/Not Sure Disagree Strongly Disagree

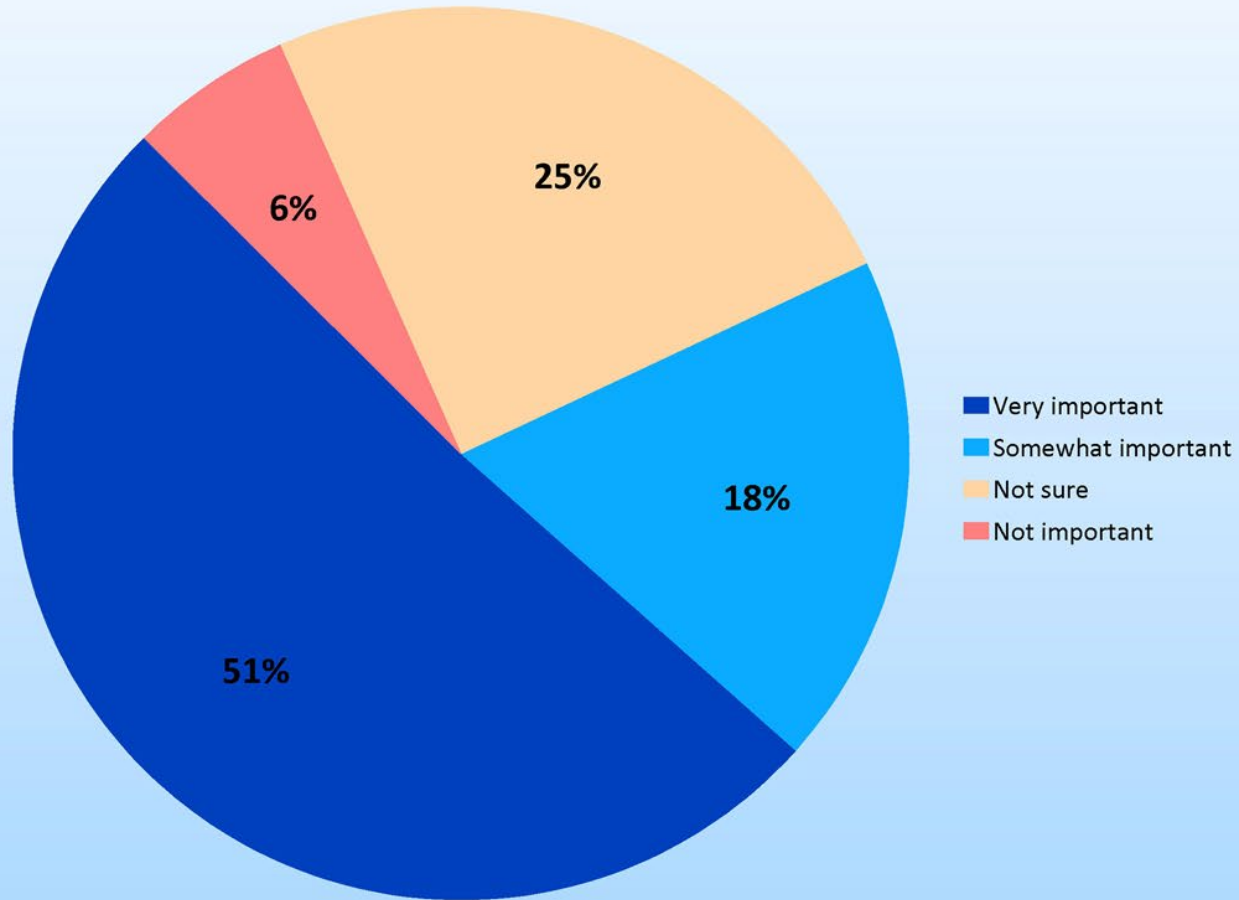
Q18. Level of Importance of Various Purposes for a Public Transit System

by percentage of respondents using a 3-point scale where 3 means Very Important and 1 means Not Important (without "not provided")



Q20. Overall, how important do you think it is for the region (Central Oklahoma Metro) to support and fund improved public transportation?

by percentage of respondents



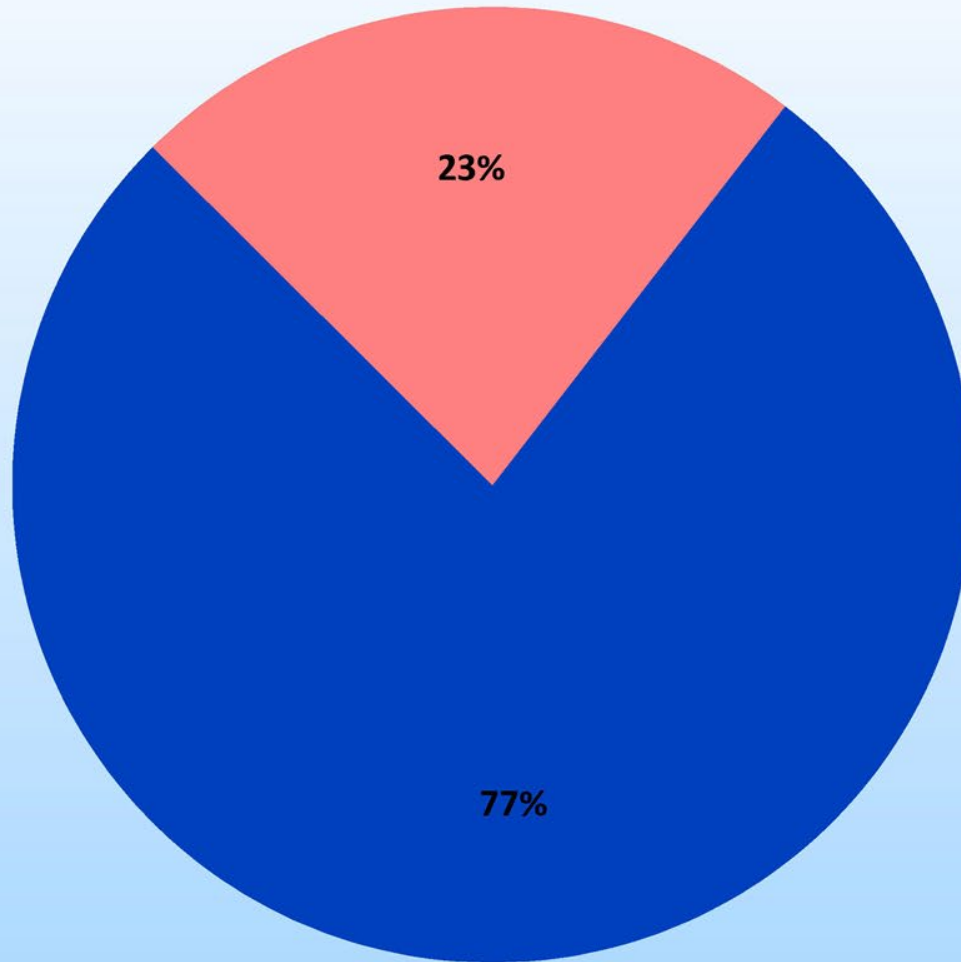
Source: ETC Institute (2020)

Findings from the Non-Rider Survey

Public Awareness of EMBARC is High

Q38. Prior to this receiving this survey, were you familiar with the public transit services offered by EMBARK?

by percentage of respondents (without "not provided")



Source: ETC Institute (2020)

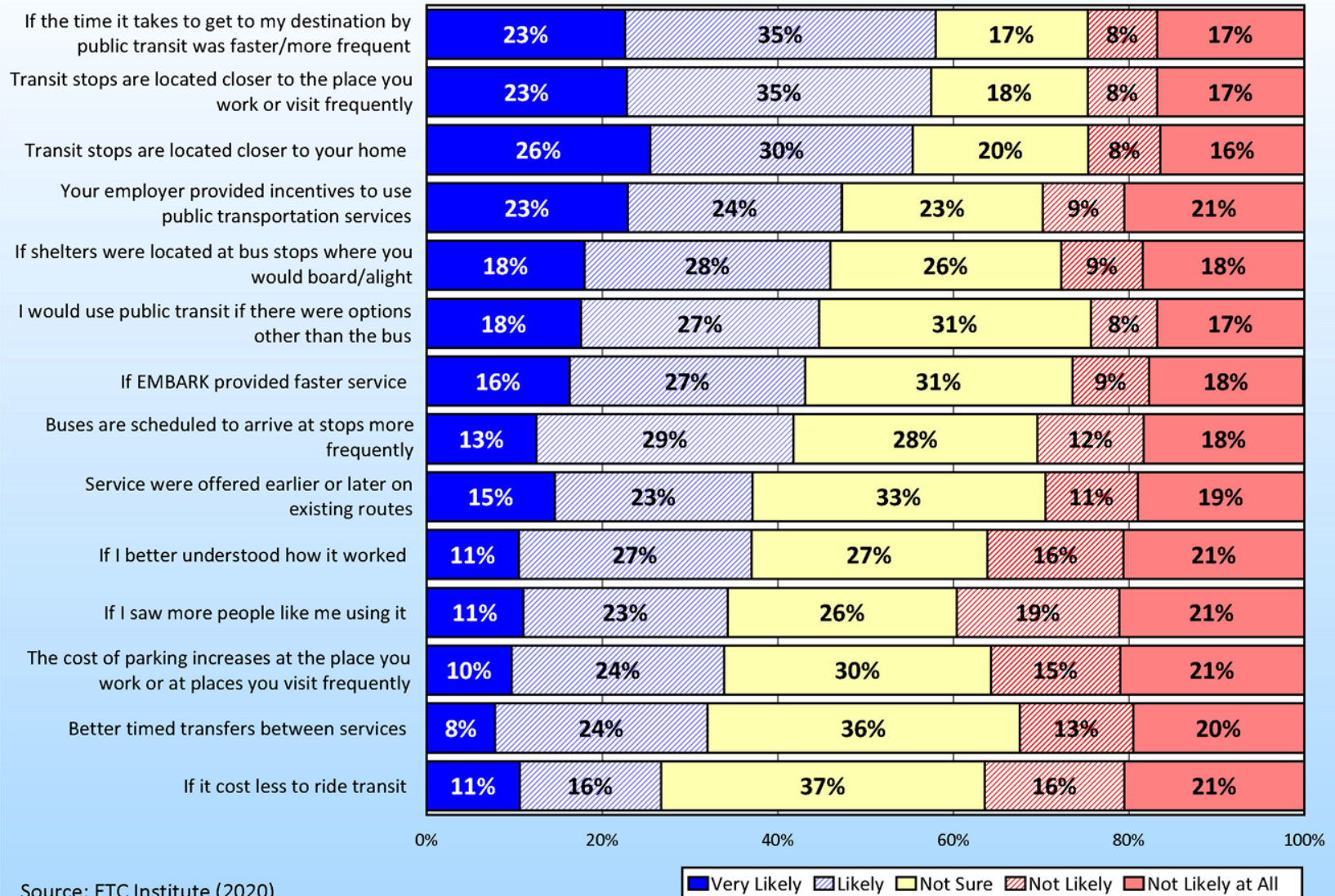
■ Yes ■ No

Findings from the Non-Rider Survey

Commuters Would Use Transit Under the Right Conditions

Q7. Likelihood of Various Factors Encouraging Public Transportation in the Region

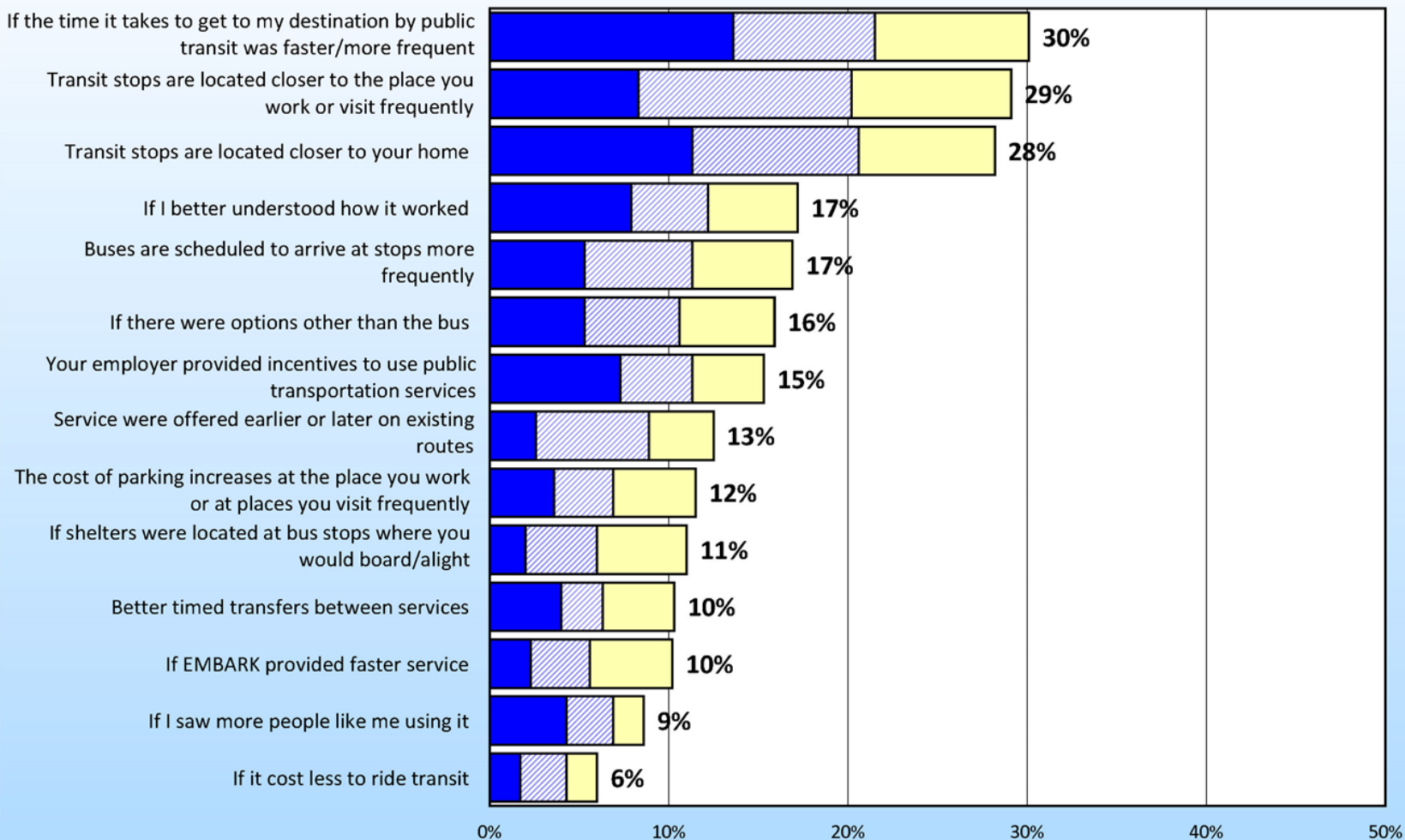
by percentage of respondents using a 5-point scale where 5 means Very Likely and 1 means Not Likely at All (without “not provided”)



Source: ETC Institute (2020)

Q8. Of the items listed in Question 7, which THREE would be MOST LIKELY to cause you to begin using public transportation services in the region?

by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2020)

■ Most Likely
 ▨ 2nd Choice
 ■ 3rd Choice

Rider Survey

Purpose of the Survey

- **Better understand the characteristics of riders**
- **Assess satisfaction of EMBARK's overall performance**
- **Identify opportunities for improvement**
- **Measure changes since the last survey efforts in 2016, 2017 and 2019**

Methodology

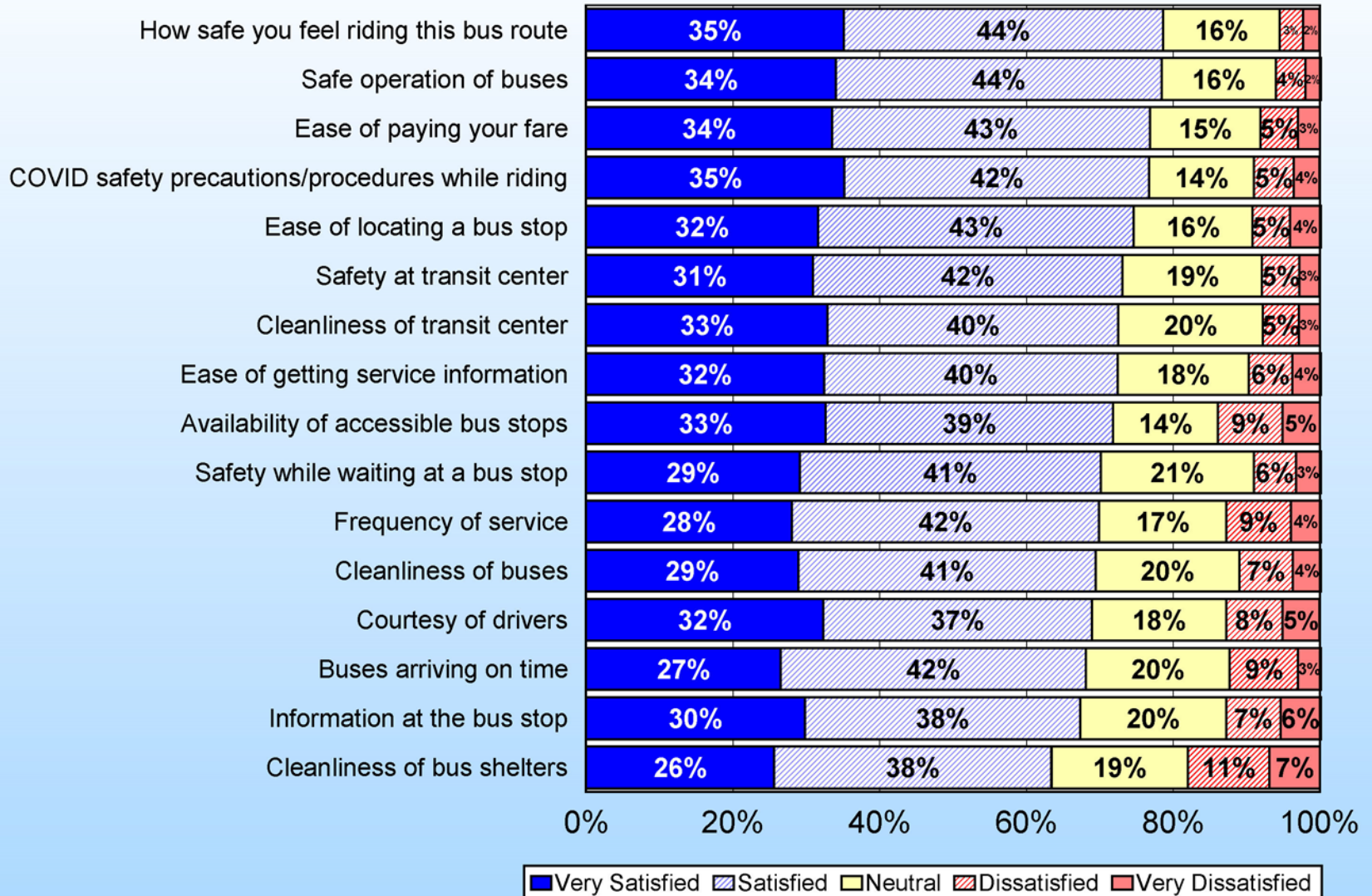
- Surveys were conducted during the fall of 2020
- 1,208 total surveys were completed: 994 in Oklahoma City and 214 in Norman, 200 on Streetcar
- Overall results have a precision of at least +/- 2.5% at the 95% level of confidence.

Findings from the Rider Survey

**Most Riders Are Satisfied
with EMBARK**

Q8. Satisfaction with Service

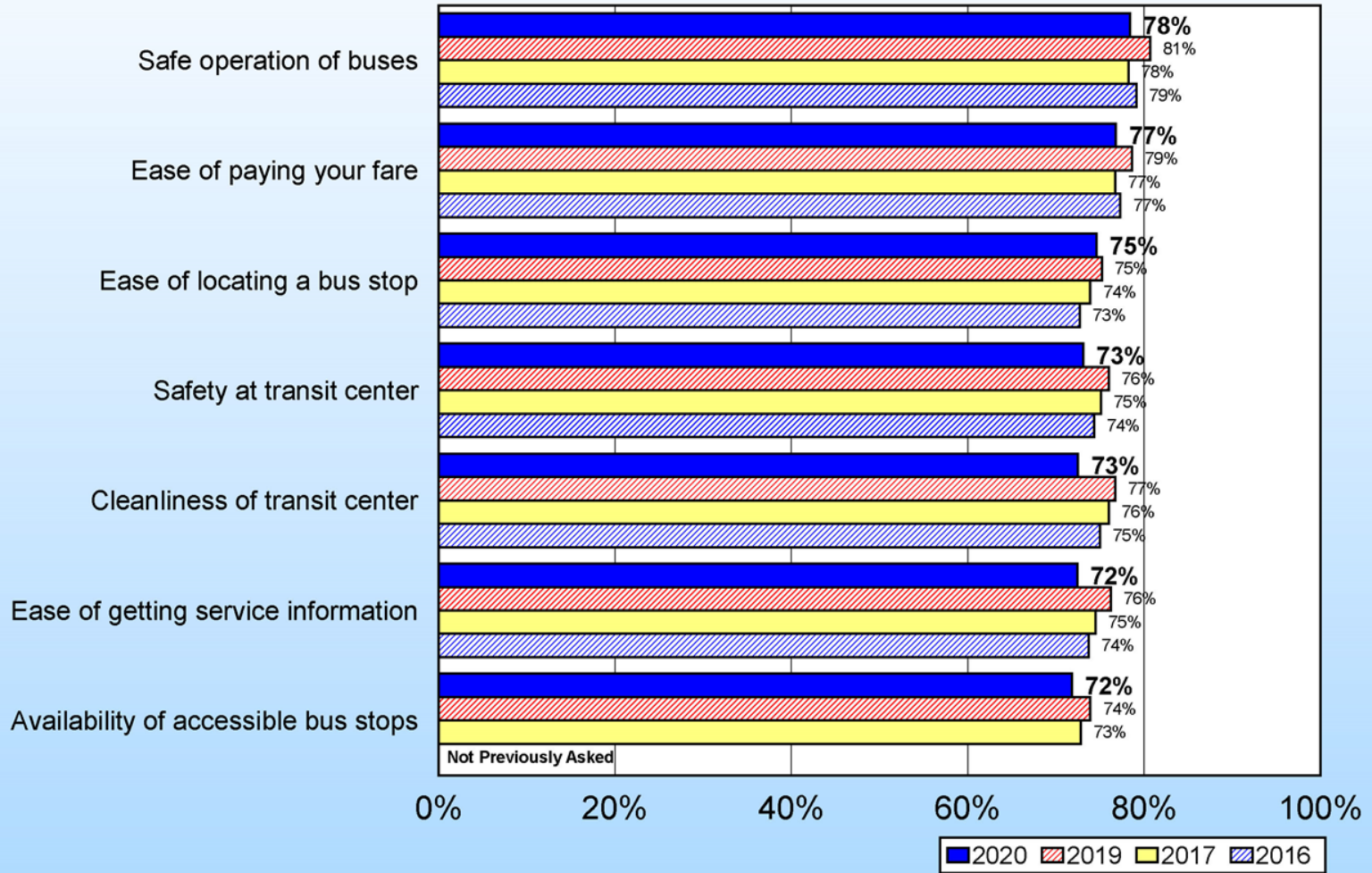
by percentage of respondents



Source: ETC Institute (2020)

Q8. Satisfaction with Service

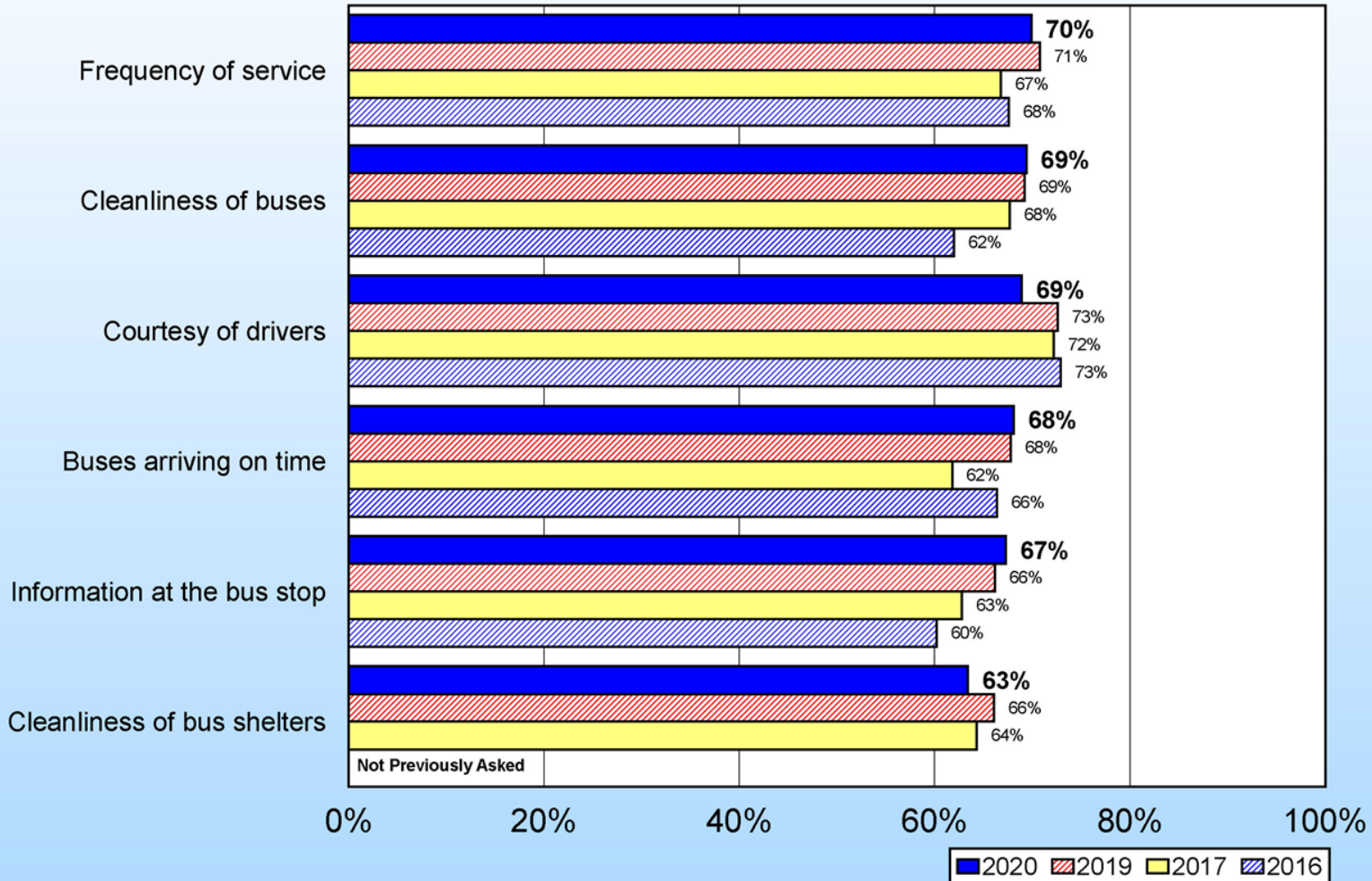
by percentage of respondents who rated the item as "Very Satisfied" or "Satisfied"



Source: ETC Institute (2020)

Q8. Satisfaction with Service

by percentage of respondents who rated the item as "Very Satisfied" or "Satisfied"



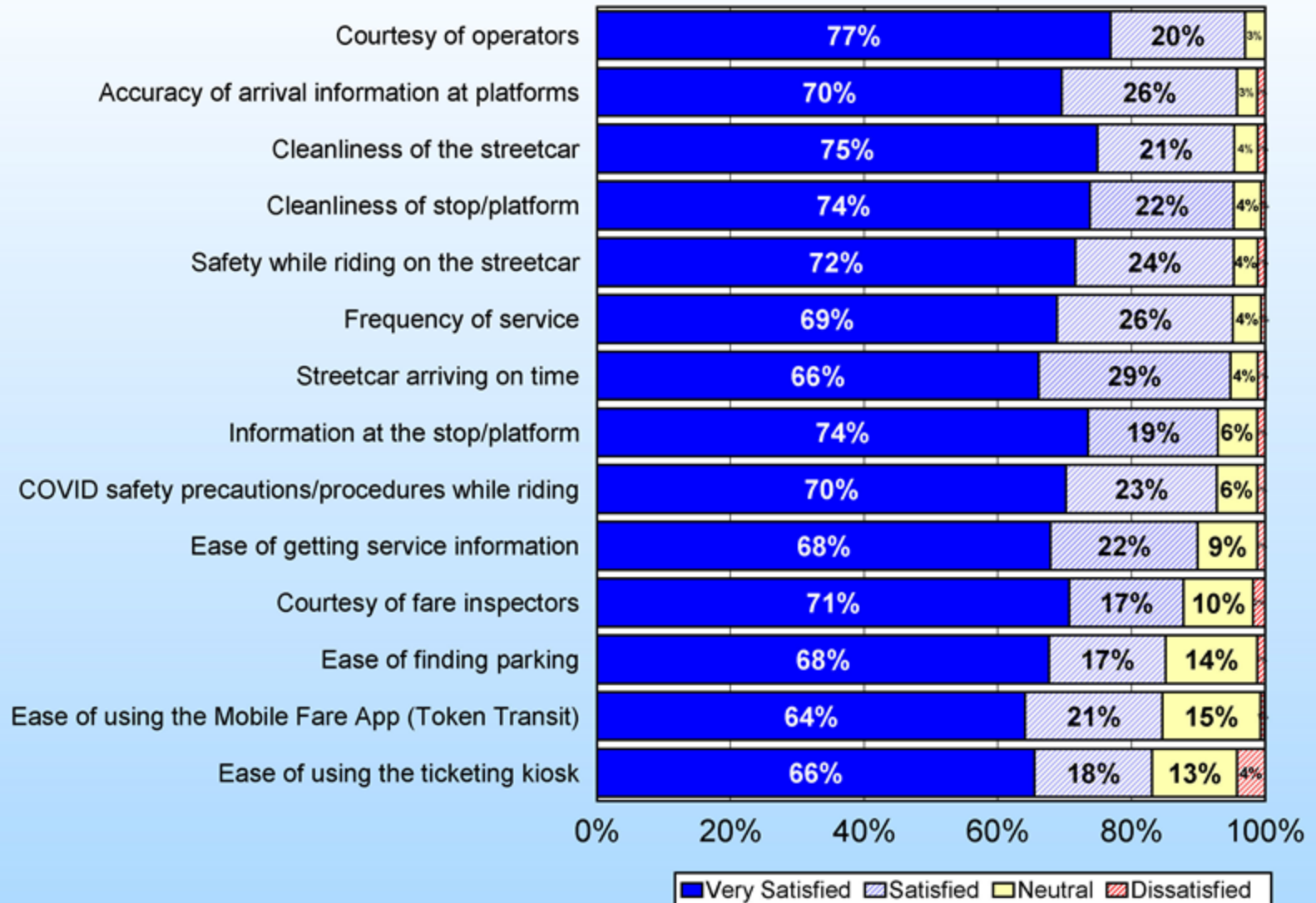
Source: ETC Institute (2020)

TRENDS

Streetcar Results

Q9. Service Ratings

by percentage of respondents (without "not provided")

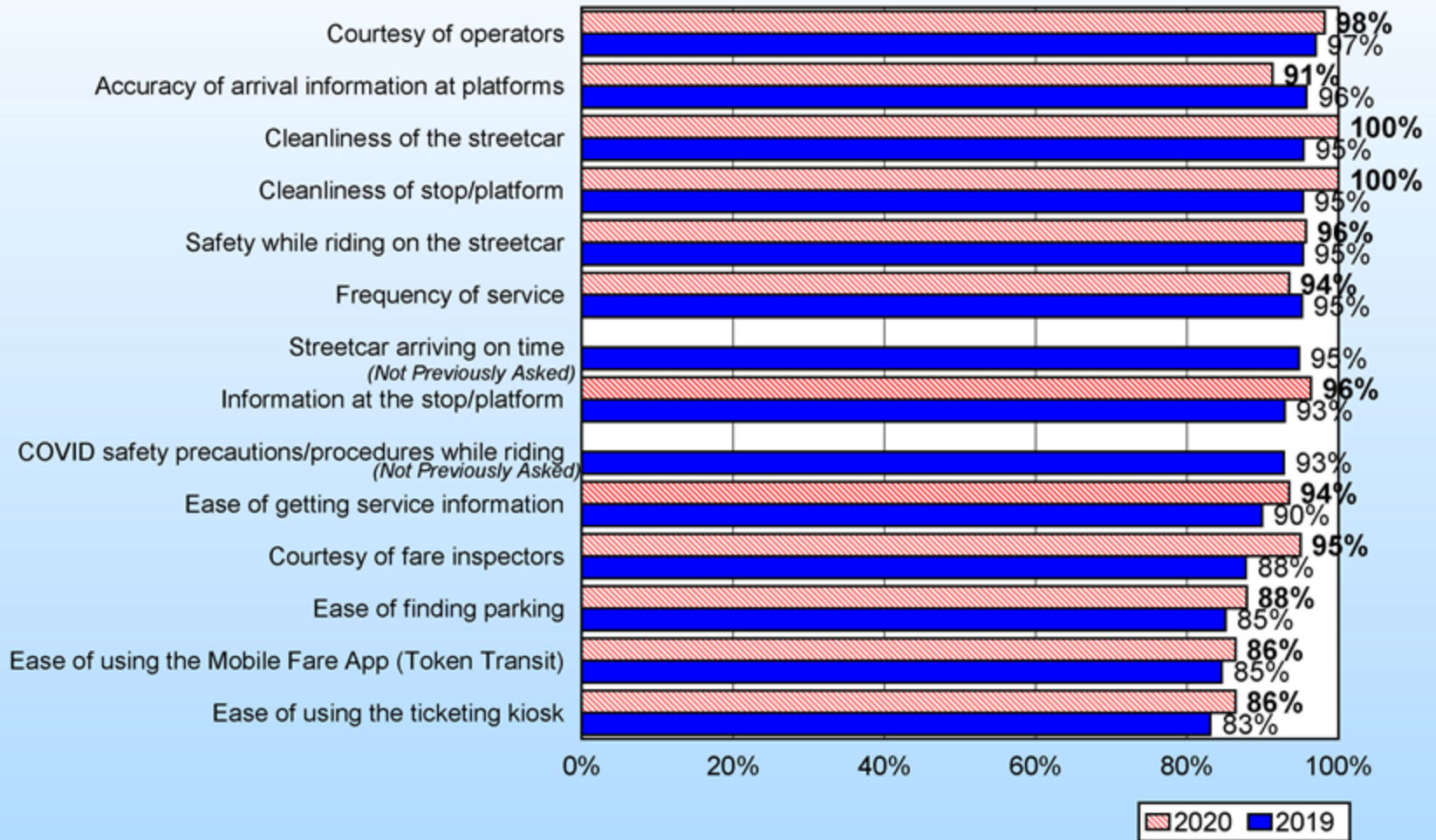


Source: ETC Institute (2020)

Streetcar Results

Q9. Service Ratings

by percentage of respondents who rated the item a 5 or 4 on a 5-point scale where 5 means "very satisfied" (without "not provided")



Source: ETC Institute (2020)

TRENDS

10 of the 12 Service Items Previously Rated Increased Compared to 2019

Who is Using the Streetcar

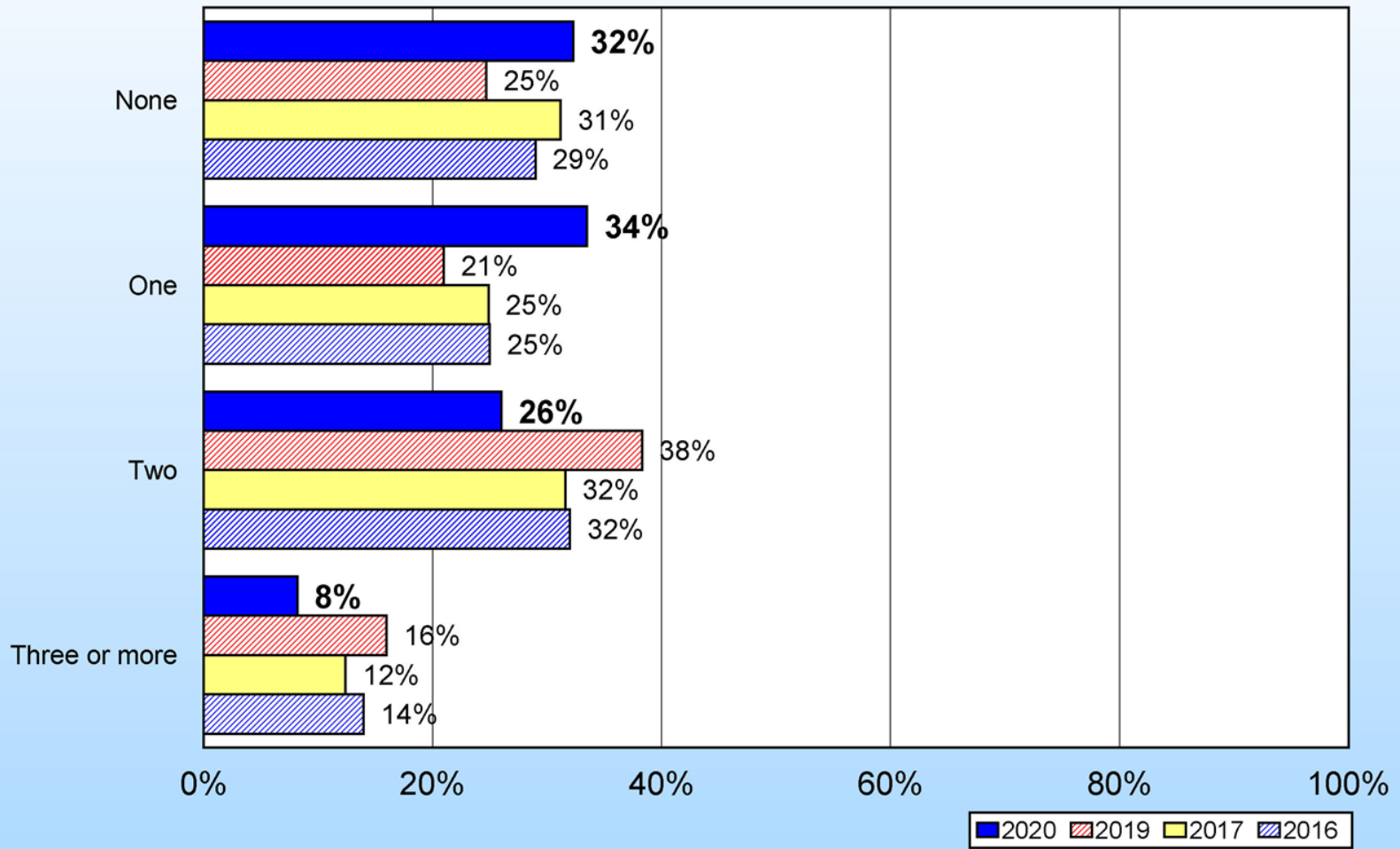
- **64% are visitors/visiting the downtown area**
- **9% work in the downtown area**
- **44% female, 52% male, 4% other/prefer not to answer**
- **Approximately 31% are non-white; 13% African American, 56% White**
- **28% reported household income less than \$20,000; 31% \$50,000 or more**
- **13% of respondents surveyed use the streetcar daily; 50% less than once per month**

Findings from the Rider Survey

**More Than Half of All Riders
Make More Than One
Transfer to Reach Their
Destination**

Q6. How Many Transfers Respondent Makes to Reach Their Destination

by percentage of respondents



Source: ETC Institute (2020)

TRENDS

Findings from the Rider Survey

Opportunities for Improvement

2020 Importance-Satisfaction Rating

EMBARC Onboard Survey - OKC

Major Categories of Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
<u>Medium Priority (IS < 0.10)</u>						
Buses arriving on time	30%	1	68%	14	0.0944	1
Frequency of service	22%	3	70%	11	0.0650	2
Courtesy of drivers	20%	4	69%	13	0.0610	3
Availability of accessible bus stops	22%	2	72%	9	0.0609	4
Cleanliness of buses	14%	5	69%	12	0.0441	5
COVID safety precautions/procedures while riding	12%	6	77%	4	0.0277	6
Cleanliness of bus shelters	7%	10	63%	16	0.0245	7
Safe operation of buses	11%	7	78%	2	0.0242	8
Information at the bus stop	6%	12	67%	15	0.0190	9
Safety while waiting at a bus stop	6%	11	70%	10	0.0185	10
How safe you feel riding this bus route	8%	8	79%	1	0.0165	11
Ease of paying your fare	7%	9	77%	3	0.0160	12
Ease of getting service information	5%	13	72%	8	0.0149	13
Safety at transit center	5%	14	73%	6	0.0126	14
Ease of locating a bus stop	4%	15	75%	5	0.0091	15
Cleanliness of transit center	2%	16	73%	7	0.0047	16

Transit Summary

- ▶ EMBARK continues to do an excellent job of raising awareness of itself
- ▶ Most residents think transit service is very important even if they are not using it
- ▶ Overall satisfaction with transit service among riders is high
- ▶ Transit service is important to the region's economy because most riders are using the service to get to/from work
- ▶ Many non-riders would be willing to use transit under the right conditions
- ▶ As service improvements are made, expectations are likely to rise

QUESTIONS?