

EMBARK 2021 Customer Survey Results

AUGUST 25, 2022

PRESENTED BY



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

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

*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 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 153 surveys were collected on routes in Norman
- Another 1,432 surveys were completed with OKC Riders
 - 1,279 riders were surveyed on buses
 - 252 riders surveyed on the Streetcar
- Overall results have a precision of at least +/-2.5% at the 95% level of confidence

MAJOR FINDINGS: TOPIC #1

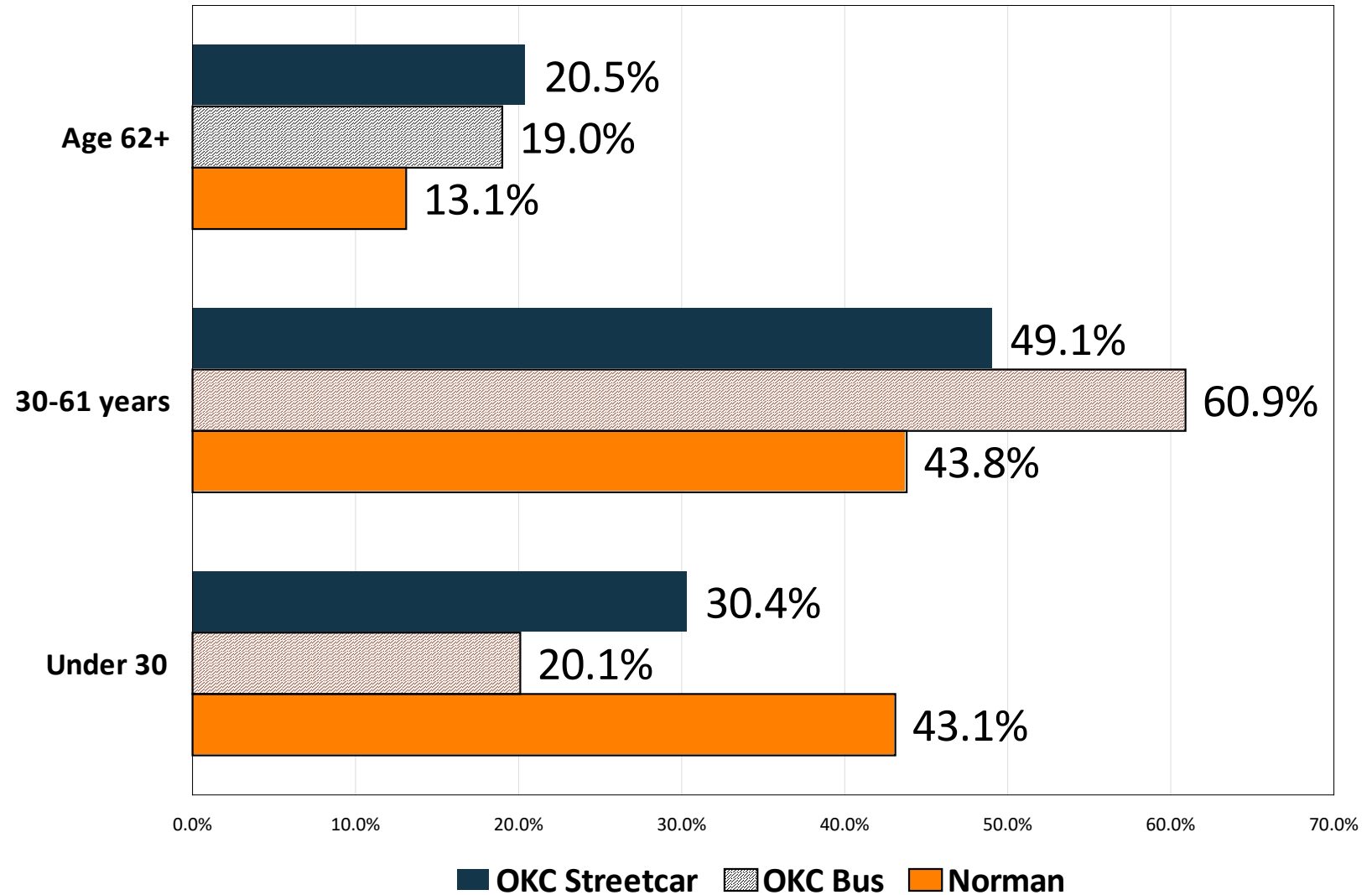
Characteristics of Transit Users

People of All
Ages Are Being
Served By
EMBARK!

*Norman Riders Are
More Likely to Be
Under 30 than
OKC users*

Age of Transit Riders

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



People of All Races Are Using Transit Services in Norman!

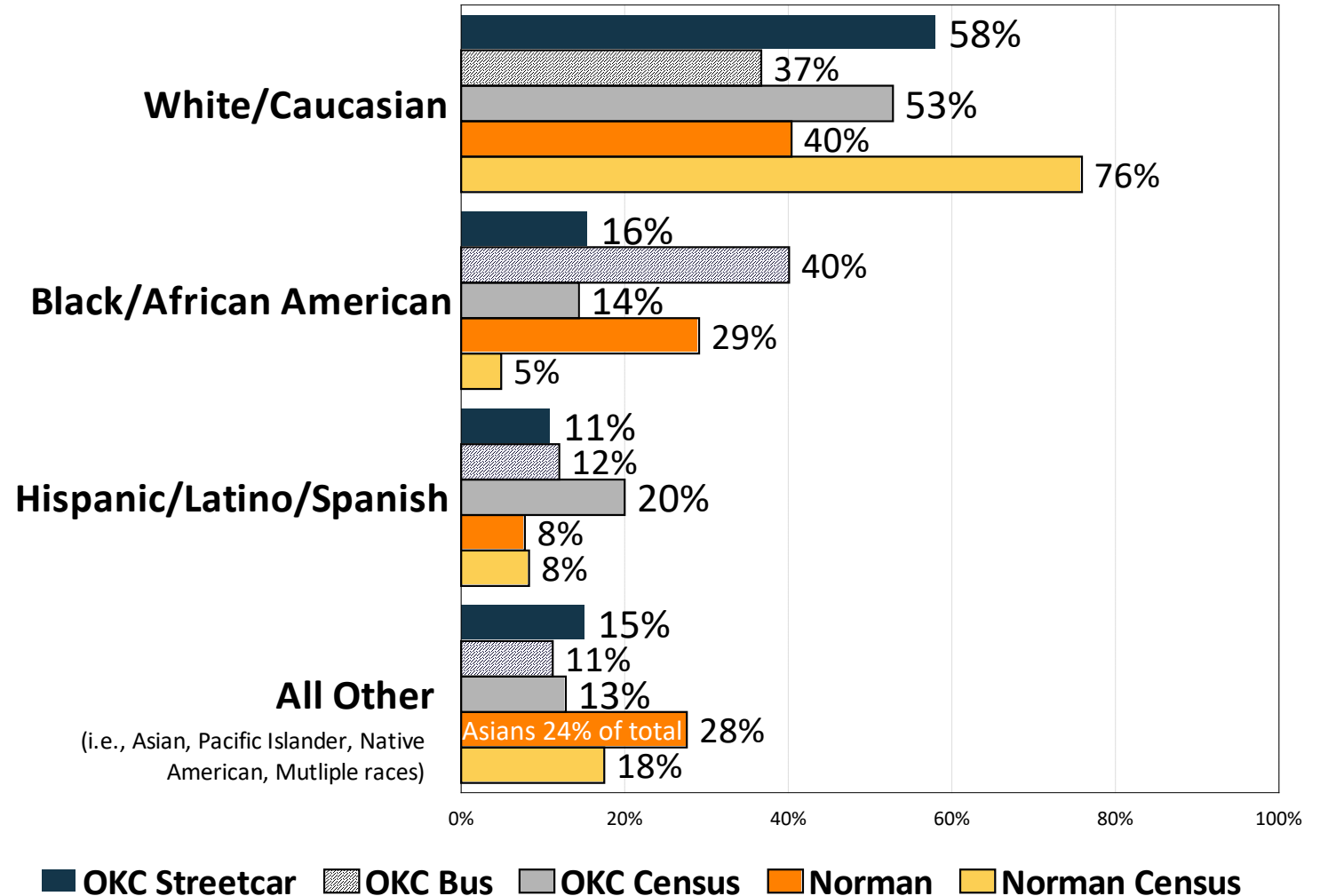
Blacks/African American
Account for 29% of the
Riders in Norman

Asians Account for 24% of
the Riders in Norman

Hispanic/Latino/Spanish
Usage Aligns with the Racial
Composition of Norman's
Population When Compared
to the Census.

Do you consider yourself?

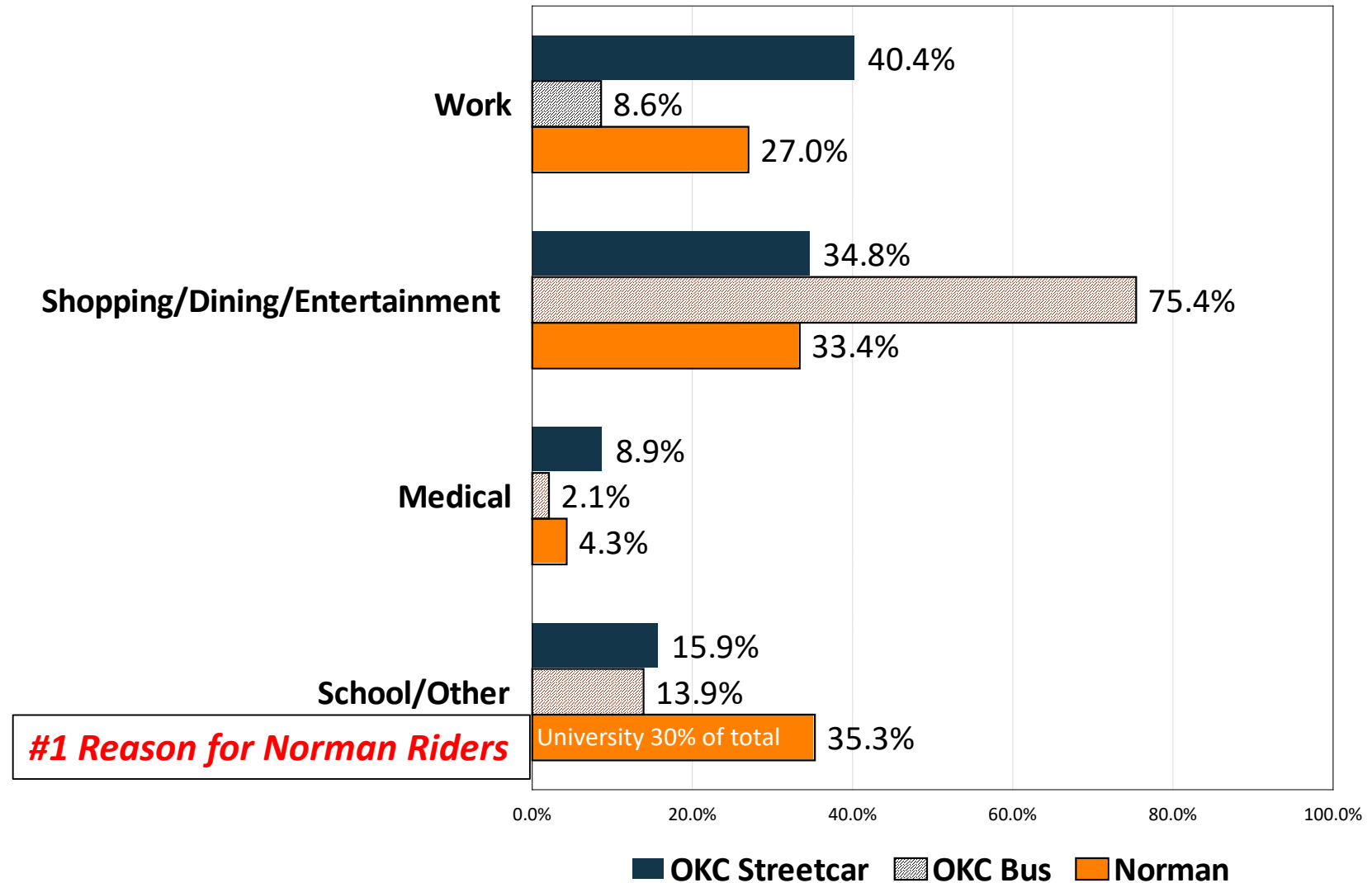
by percentage of riders



University-Related Trips Are the #1 Reason People Use the Bus in Norman

What was the main purpose of your trip today?

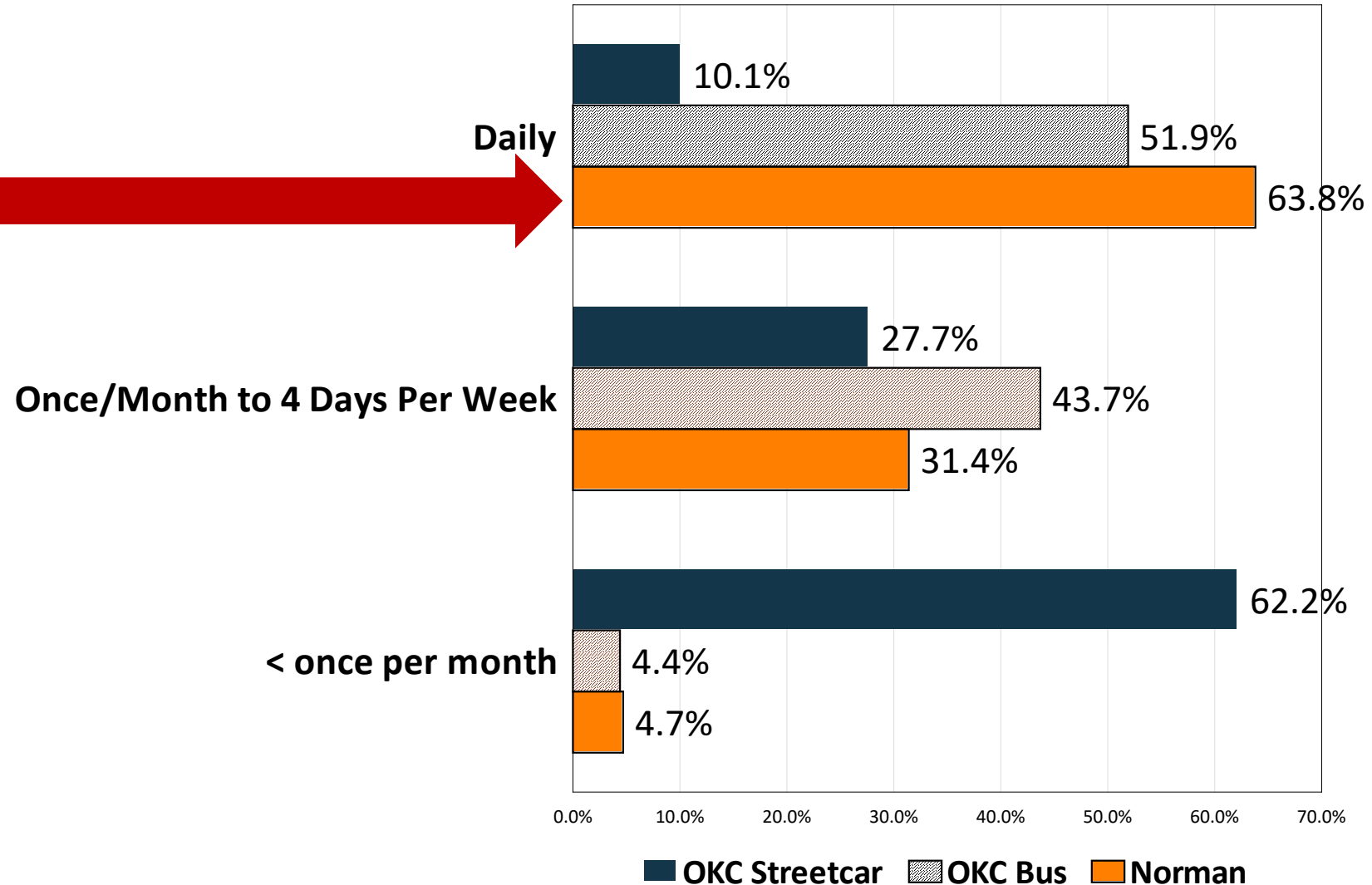
by percentage of riders (excluding "not provided" responses) - response choices have been collapsed



The Majority of
Bus Riders in
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)



MAJOR FINDINGS: TOPIC #2

Satisfaction with Transit Services

Satisfaction with Norman Bus Improved in 12 of 15 Areas!

Largest Increases

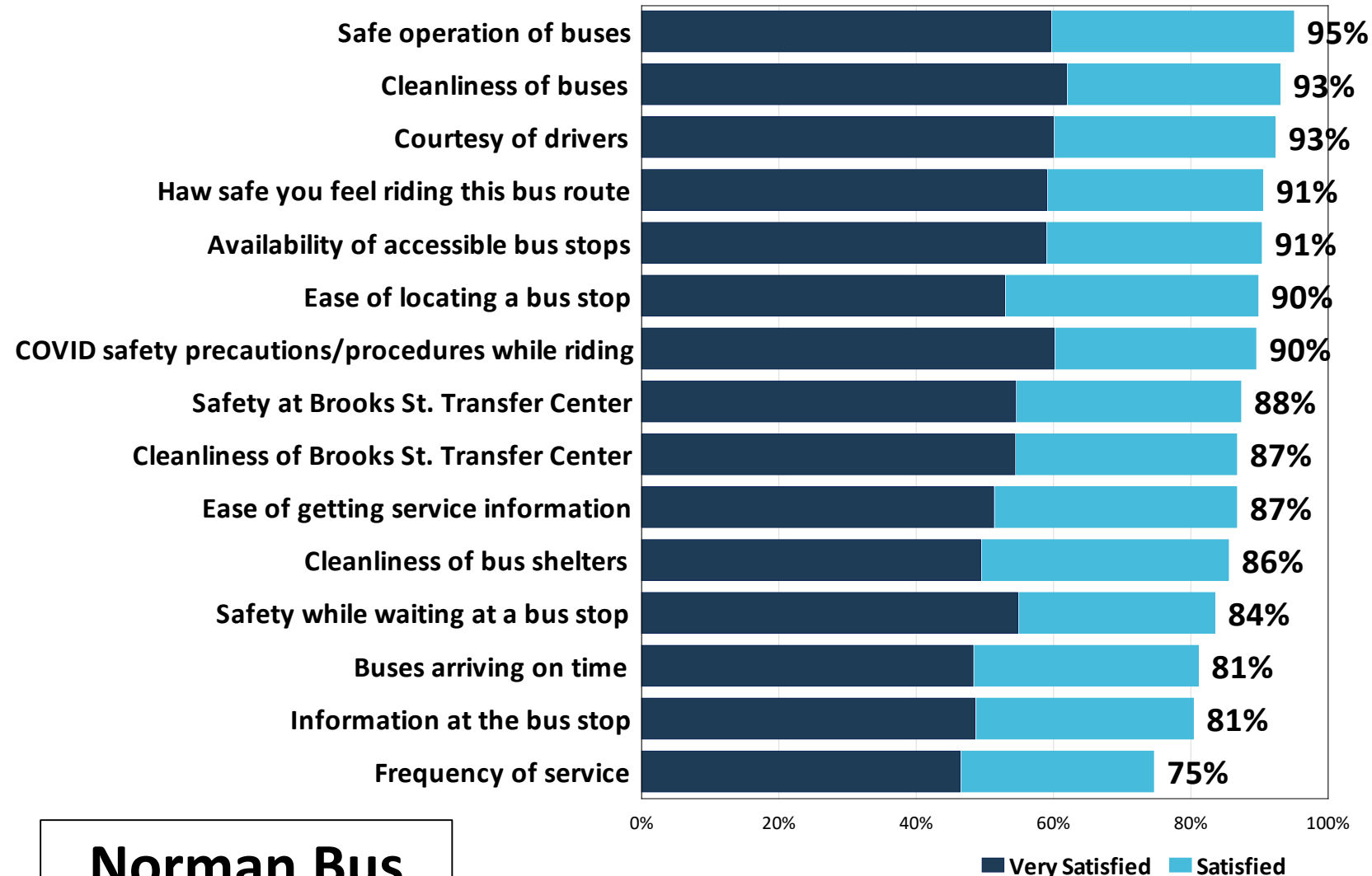
- Ease of getting information (+10.9)
- Avail. of accessible stops (+8.5%)
- COVID safety procedures (+7.7%)
- Safe operation of buses (+7.2%)
- Ease of locating a bus stop (+7.0%)
- Cleanliness of buses (+6.2%)

Decreases

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

Satisfaction with Norman Bus Services

by percentage of riders

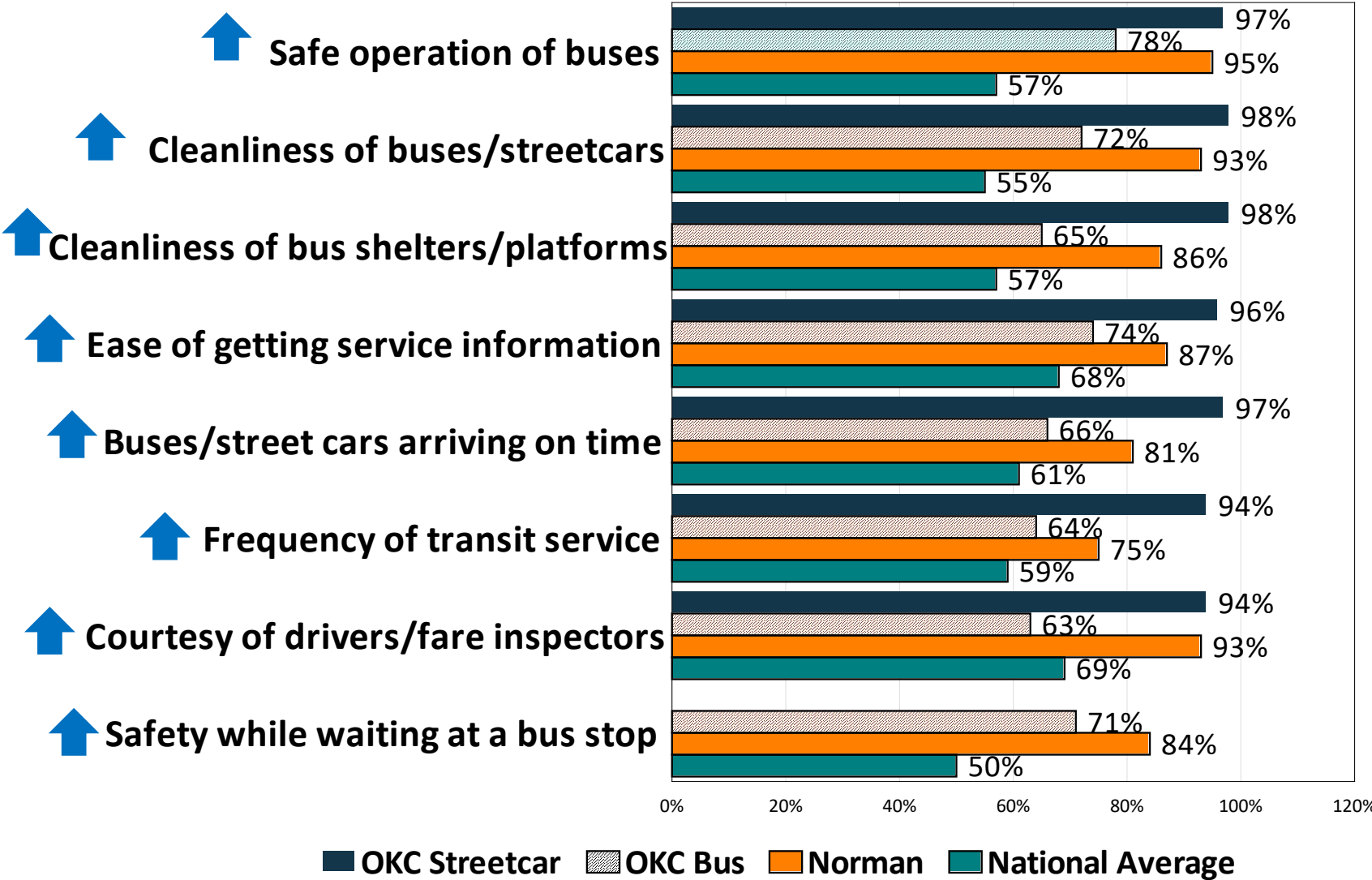


Norman Bus

EMBARC's
Norman Service
Is Setting the
Standard for
Customer
Satisfaction in
All Areas!

Embark Satisfaction vs. National Average

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

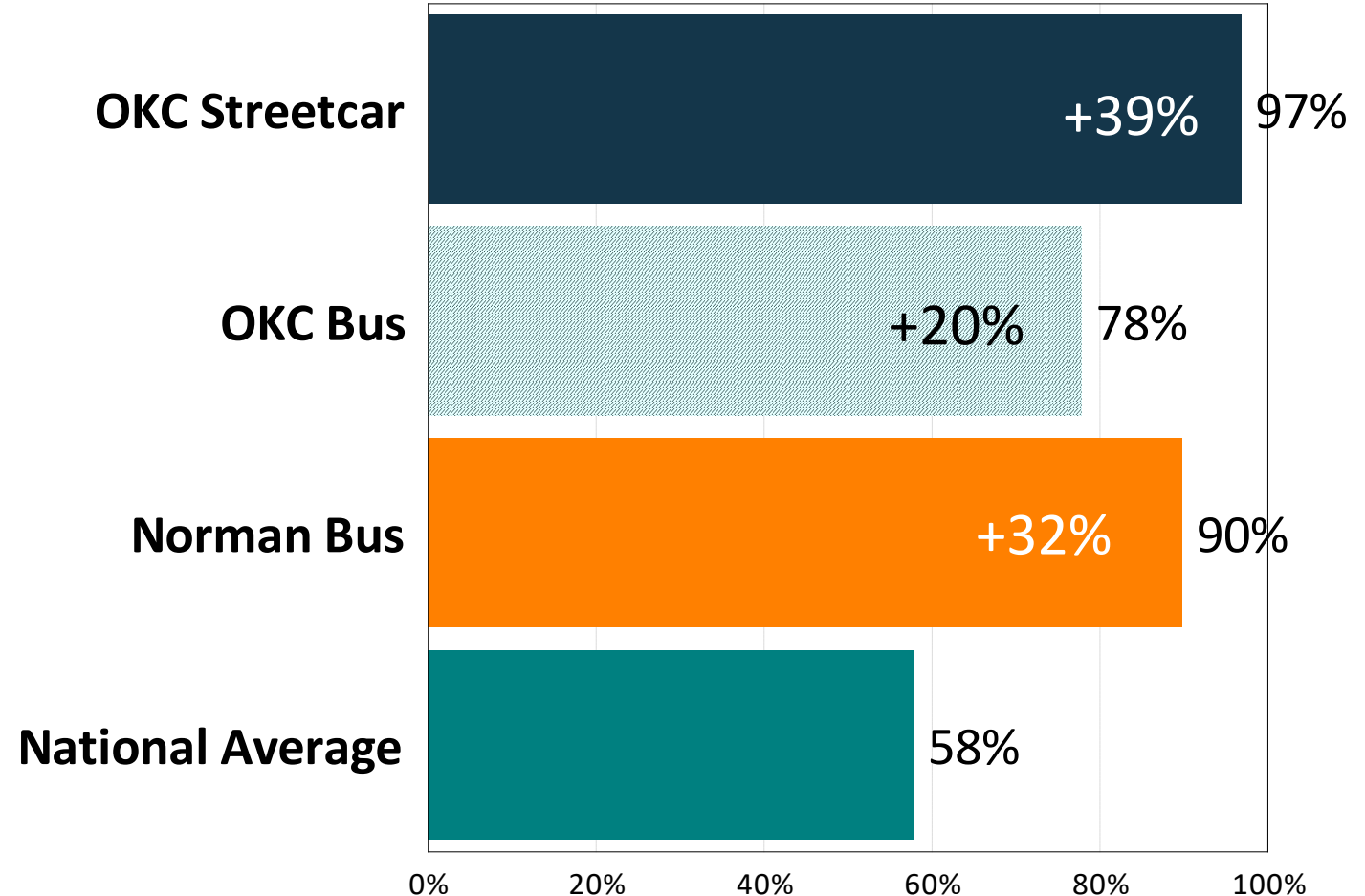


Overall
Satisfaction with
the Quality of
Service Provided
By EMBARK is
Very High!

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")



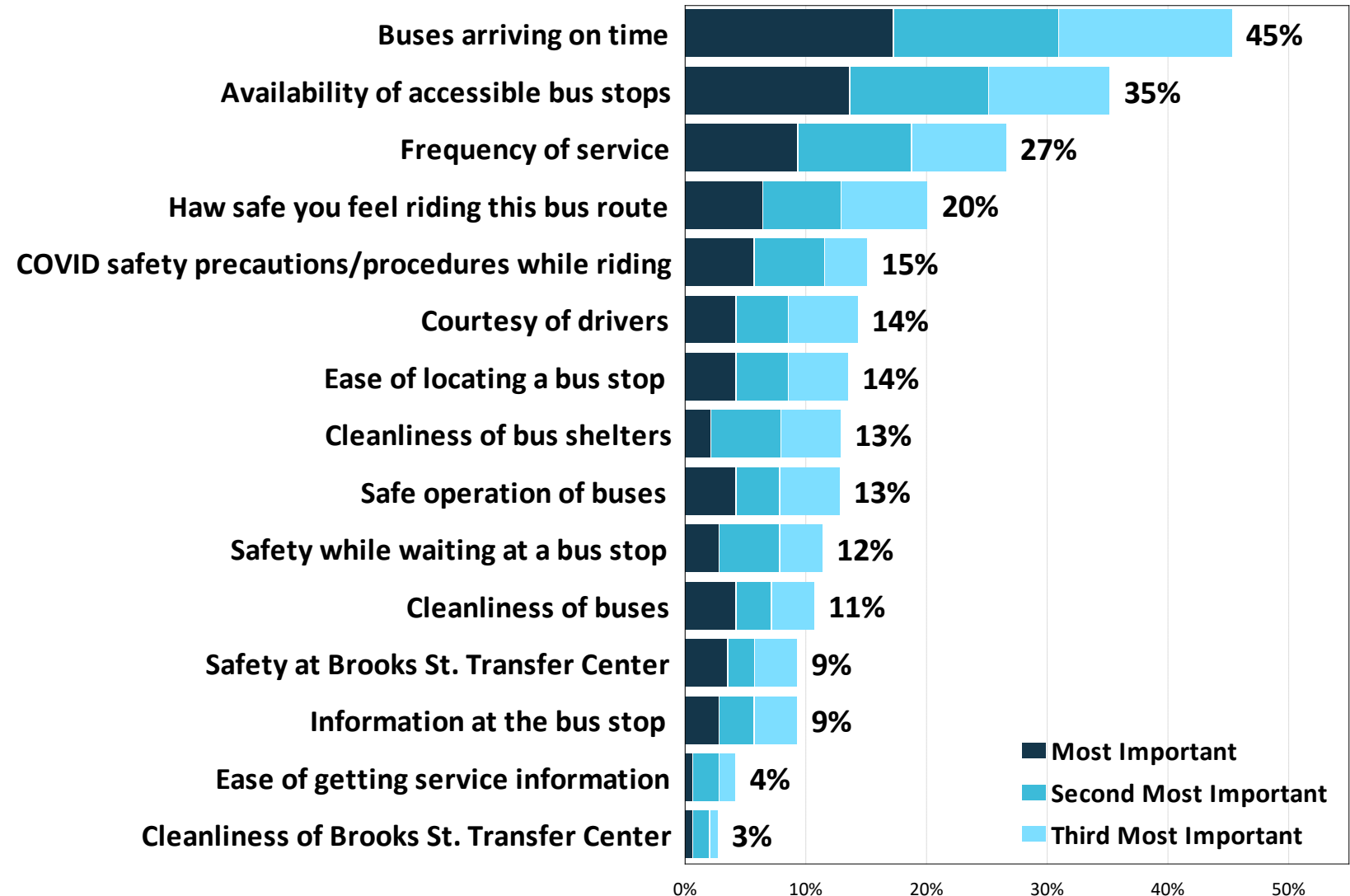
MAJOR FINDINGS: TOPIC #3

Top Priorities and Opportunities to Improve Transit Services

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



Norman Importance-Satisfaction Rating

EMBARC 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
<u>Medium Priority (IS < 0.10)</u>						
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
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 transfer center	5%	11	86%	6	0.0064	11
Safe operation of buses	4%	12	88%	3	0.0043	12
Cleanliness of transfer 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

Top 6
Opportunities
for
Improvement



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

Summary



Summary

- **EMBARK is setting the standard when it comes to providing riders with an excellent customer experience!**
 - 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 15 Norman Bus 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!