4 Existing Conditions

EXISTING TRANSIT SERVICES

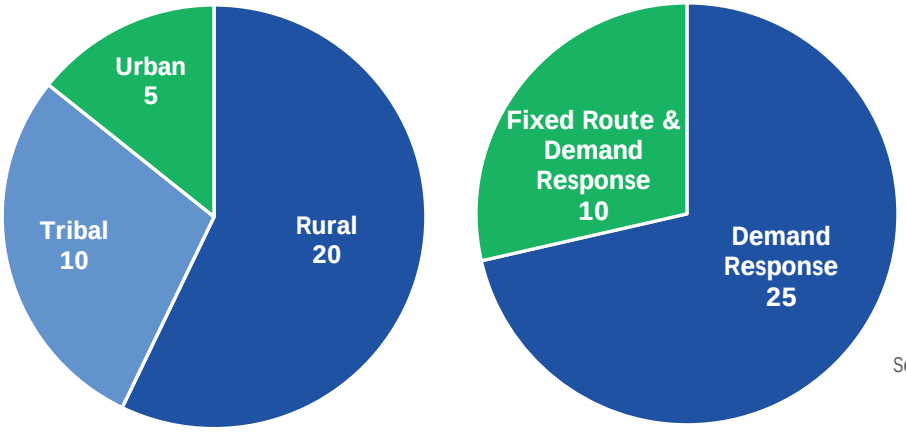
There are 37 recipients of federal transit funding in the state of Oklahoma, under either FTA section 5307 or 5311 (tribal funding is provided through FTA section 5311(c)). Thirty-five of these recipients are transit systems that operate a range of services across the state, broadly categorized into fixed-route or demand-response (Figure 4-1).[1]

More than 100 entities receive federal transit funds through ODOT to support additional community-based transportation services for older adults and persons with disabilities.

In general, transit systems in urban areas operate scheduled, fixed-route services, while rural areas are more likely to be served by demand-response services. Five urban systems operate fixed-route service but also provide some level of demand-response services. Also, as part of receiving federal funds for fixed-route services, these systems are required to provide demand-response paratransit services within their fixed-route service areas. Twenty rural systems provide demand-response services. Two tribal systems and three rural systems also provide limited fixed-route services, mostly oriented toward connecting people to employment sites. Twelve tribal entities receive federal transportation funds to support transit services. Ten of these tribal entities operate transit services as listed in Figure 4-2. Two additional tribal entities are federal funding recipients (Cherokee Nation and the Northeast Oklahoma Tribal Transit Consortium) and contract with transit agencies to provide service.

1 A small portion of the Fort Smith, AR, urbanized area (UZA) extends into Oklahoma, with transit service that operates into this portion of Oklahoma. As a result, the transit provider contributes part of its federal funds to the state of Oklahoma, which redistributes it to other small urban transit agencies in the state. This redistributed funding is reflected in the budgets of Oklahoma's transit agencies; thus, Fort Smith service is excluded from this analysis.

Figure 4-1 Number of Transit Service Providers in Oklahoma by Federal Funding Category and Type of Service



Source: U.S. Department of Transportation, FTA, National Transit Database (NTD)

About the Data

To conduct the analysis in this chapter, the project team used the most recent data available at the time of analysis. Data on transit service, including ridership and service performance, are based on 2018 data from the FTA's NTD. Population and demographic information are based on the U.S. Census American Community Survey, using 2013-2017 five-year estimates. Data on employment is based on Longitudinal Employment-Household Dynamics (LEHD) program data, administered through the U.S. Census Center for Economic Studies, from 2010 and 2017. Additional data sources were used for specific topics in this chapter, and analysis was based on the most recent data available from those sources.

Figure 4-2 Transit Providers by Federal Funding Classification and Type of Service

Service Provider	Service Type
Urban	
City of Norman	Fixed Route and Demand-response (Small)
Citylink of Edmond	Fixed Route and Demand-response (Small)
EMBARK	Fixed Route and Demand-response (Large)
Lawton Area Transit System (LATS)	Fixed Route and Demand-Response (Small)
Tulsa Transit	Fixed Route and Demand-Response (Large)
Tribal	
Cheyenne and Arapaho Transit Program	Fixed Route and Demand-Response (Large)
Chickasaw Nation Transportation Services	Demand-Response (Large)
Choctaw Nation Tribal Transit	Demand-Response (Large)
Citizen Potawatomi Nation Tribal Transit	Demand-Response (Small)
Comanche Nation Transit	Demand-Response (Large)
Kiowa Fastrans	Demand-Response (Small)
Muscogee (Creek) Nation Tribal Transit	Fixed Route and Demand-Response (Large)
Seminole Nation Transit	Demand-Response (Small)
United Keetoowah Band Transit	Demand-Response (Small)
White Eagle Transit	Demand-Response (Small)
Rural	
Beaver City Transit	Demand-Response (Small)
Call A Ride Public Transit	Demand-Response (Small)
Central Oklahoma Community Transit System (COTS)	Demand-Response (Small)
Cherokee Strip	Demand-Response (Large)
Cimarron Public Transit System	Demand-Response (Large)
Delta Public Transit	Demand-Response (Small)
Enid Public Transit	Demand-Response (Large)
First Capital Trolley	Fixed Route and Demand-Response (Large)
JAMM Transit	Demand-Response (Large)
KI BOIS Area Transit System (KATS)	Demand-Response (Large)

Service Provider	Service Type
Little Dixie Transit	Demand-Response (Large)
MAGB Transportation	Demand-Response (Large)
Muskogee County Public Transit Authority	Fixed Route and Demand-Response (Small)
OSU/Stillwater Community Transit System	Fixed Route and Demand-Response (Large)
Pelivan Transit	Demand-Response (Large)
Red River Public Transportation Service	Demand-Response (Large)
Southern Oklahoma Rural Transit System (SORTS)	Demand-Response (Large)
Southwest Transit	Demand-Response (Small)
The Ride (City of Guymon)	Demand-Response (Small)
Washita Valley Transit	Demand-Response (Small)

Source: FTA and ODOT

Transit service coverage areas, or the places where transit services travel, vary across the state. Most transit agencies' service areas are defined by jurisdictional boundaries, such as city or county lines. Other transit agencies may serve only a portion of a county or include multiple counties. There are several instances of overlapping service areas across the state, where service is provided by more than one transit system. For example, an area may be covered by both rural and tribal transit services. Maps of the service coverage areas for urban, rural, and tribal transit agencies are shown in Figure 4-3 through Figure 4-5.

Nearly all of Oklahoma's residents—99%—live within the coverage area of at least one public transit provider (Figure 4-6). However, while many areas appear to be covered by at least one transit service provider, the reality is that constrained resources limit the ability of transit operators to deliver service to everyone in these communities. As a result, many residents who live within a transit service coverage area may have only partial or no access to service compared to what is shown in Figure 4-4 and Figure 4-5.

About 27% of Oklahomans live within reasonable access of fixed-route service or have access to demand-response service. The remaining 73% are located in a service area for demand-response service only. In many areas where public transit is not available, many community, health, and faith-based organizations provide transportation for older adults and people with disabilities, providing mobility options for vulnerable populations and connecting them to medical and other services.

Figure 4-3 Urban Transit Service Designated Coverage Areas

Figure 4-4 Rural Transit Service Coverage Areas

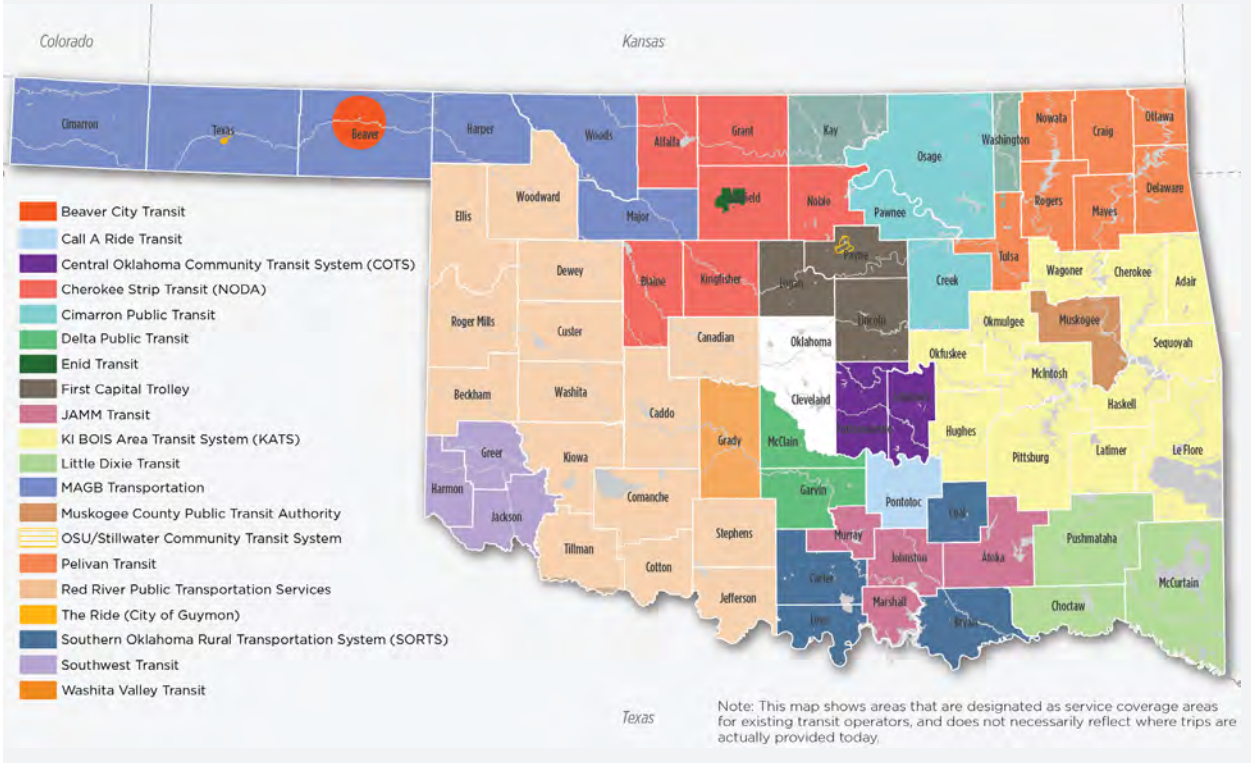


Figure 4-5 Tribal Transit Service Coverage Areas

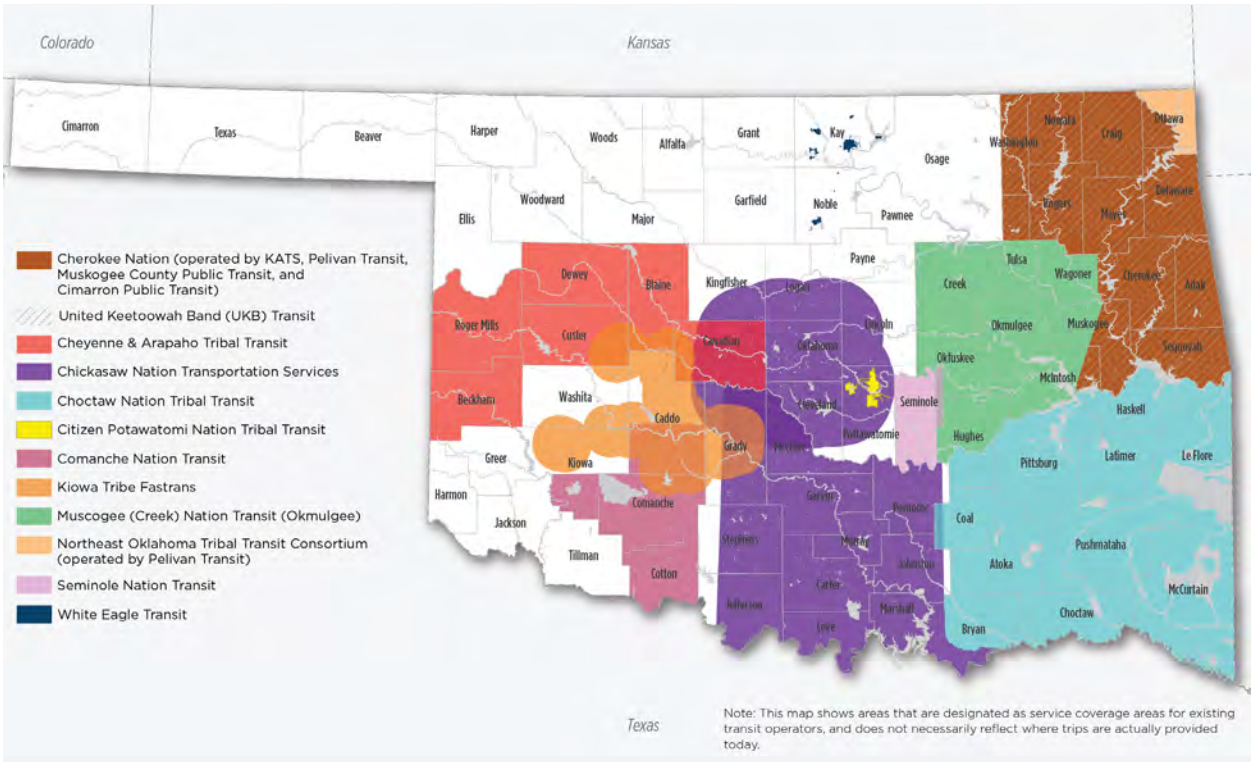
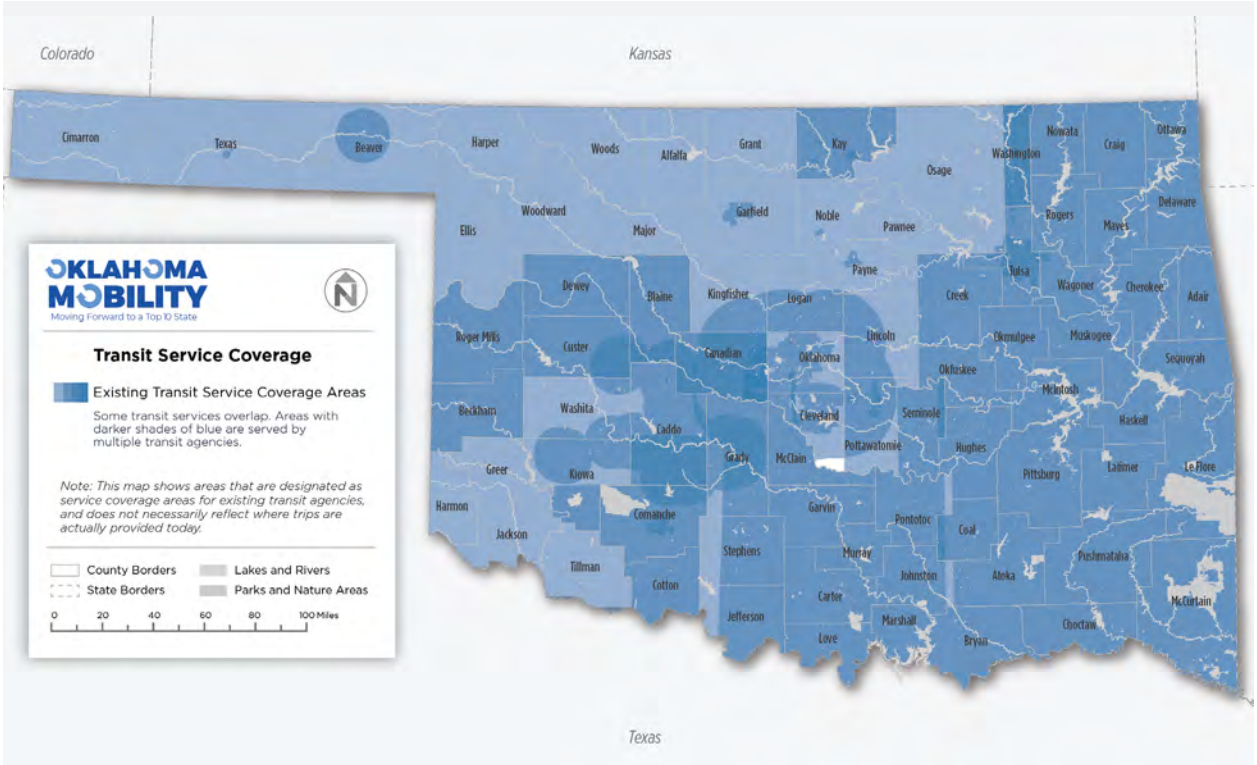


Figure 4-6 Transit Service Coverage Areas – All Programs

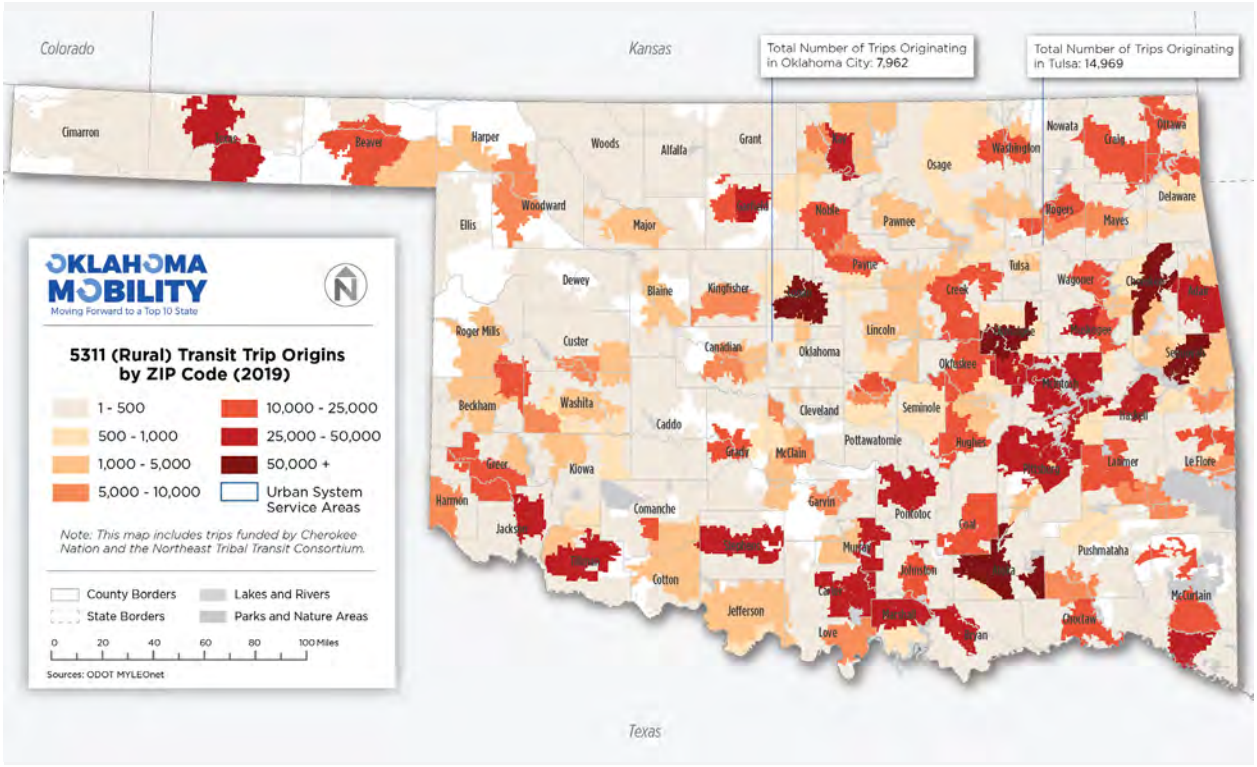


A Closer Look at Rural Service

The state of Oklahoma provides rural transit agencies with access to MYLEOnet, a proprietary software application designed to collect data from the state's FTA section 5311 transit services. Through MYLEOnet, Oklahoma's rural transit agencies report data including ridership, origin-destination data, and operating performance. A map of all trip origins on rural transit services (by ZIP Code) is shown in Figure 4-7. While nearly two million trips were provided in 2019, comparing Figure 4-7 to Figure 4-4 shows that service is not necessarily provided in all of the areas that are designated as service coverage areas. This is because many transit agencies are unable to adequately serve all of the communities within their coverage areas, often due to limited capacity and constrained funding. Areas with the most frequent number of trips are:

- Across east-central Oklahoma, particularly in Cherokee, Sequoyah, Adair, and Muskogee counties, as well as Okmulgee, McIntosh, Pittsburg, Muskogee, and Haskell counties
- Logan County just north of the Greater Oklahoma City Metropolitan Area
- Southern Oklahoma including Atoka, Carter, Marshall, northwest Bryan, and eastern Murray counties
- Stephens County
- Southern McCurtain County
- Northern Pontotoc County

Figure 4-7 Rural (5311) Transit Trip Origins by ZIP Code



- Parts of Tillman, Jackson, and Greer counties in the southwest
- Central Garfield County
- Central Kay County
- In the panhandle, focused in central Texas County as well as central Beaver County
- Craig, Ottawa, and northern Delaware counties in the northeast, and central Washington County

Riders utilize rural transit agencies for a wide variety of trip purposes (Figure 4-8). The largest share of trips—25%—are taken for medical purposes, while other trips are evenly distributed among getting to education, jobs, shopping, and recreation, as well as other opportunities.

Figure 4-8 Rural (5311) Transit Trips by Purpose

Trip Purpose	Number of Trips	Percentage of Trips
Medical	458,830	25%
Education	281,235	15%
Employment	269,393	15%
Shopping	264,521	14%
Recreation	231,082	13%
Other	325,660	18%

Source: MYLEOnet, ODOT

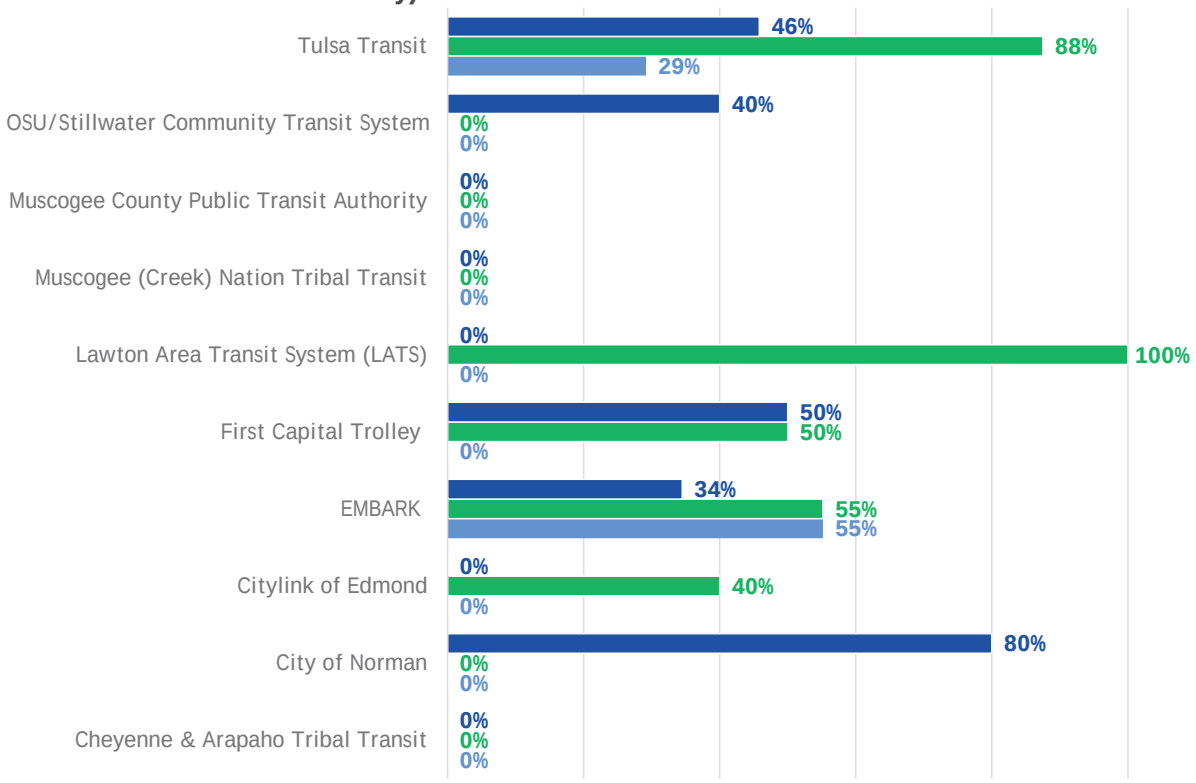
Fixed-Route Services

About 27% of Oklahoma's population lives within one-half mile of fixed-route transit service. However, living in a county or city that offers public transit service does not necessarily mean it is accessible to all residents, particularly if an individual wants to take a trip on a day when service is not operating (e.g., weekends) or at a time of the day when there is no service (e.g., evenings).

To examine transit availability in these time periods, this study calculated the portion of existing services available on weekday evenings (defined as after 7 p.m.) and on weekends (Saturdays and Sundays). This calculation was performed by counting the number of routes an agency has that offer service on weekday evenings and weekend days and expressing this as a percentage of the total number of routes.

The results (Figure 4-9) show that in general, much less service is available on weekday evenings, Saturdays, and Sundays compared to weekday daytime hours. Beyond traditional weekday periods, there is generally more service available on weekday evenings than on Saturdays, and more service on Saturdays than Sundays. Within these general findings, there are variations. Lawton Area Transit System (LATS) provides full coverage on Saturday and EMBARK offers slightly more than half their service (55% of all routes) on Saturday and Sunday. Only Tulsa Transit and EMBARK offer Sunday service. There is significant opportunity to expand the hours and days when service is available, which would make transit a more convenient, reliable transportation option and better serve a variety of trip purposes outside of traditional work hours.

Figure 4-9 Percentage of Routes Operating During Evenings, Saturdays, and Sundays (Fixed-Route Services Only)



Source: Nelson\Nygaard, information from individual transit agencies

Demand-Response Services

Unlike fixed-route service that typically operates on a regular schedule, users of demand-response services must contact the service provider to reserve a trip in advance. Many of these services are only available on weekdays, and generally operate during typical business hours only (i.e., 8:00 a.m. to 5:00 p.m.). Appendix D includes more detailed information on service areas and availability.

Intercity Bus Services

Most intercity bus service in the United States has been provided by private for-profit firms without any subsidy, federal or state. These services often provide the only publicly available scheduled services linking the towns and cities with the national network and connections to more distant points. This is true in Oklahoma as well. Oklahoma's intercity bus services benefit from the fact that there are a number of routes that pass through the state, so their viability is not completely dependent on the revenue generated at stops in Oklahoma.

Prior to the COVID-19 pandemic, intercity bus service in Oklahoma was provided by five firms: Greyhound Lines, Jefferson Lines, Tornado Bus Company and new entrants, Flixbus and Vonlane. None of these services received any type of subsidy to operate these services, nor had they been contacted by ODOT as part of a consultation process under the FTA section 5311(f) program. Greyhound and Jefferson are part of the national intercity bus network of interlined services, so a ticket on one service may be used on the other, and they generally share stops and coordinate schedules. Flixbus and Vonlane each have their own ticketing and separate stops. There is no central source of intercity bus information (either nationally or in Oklahoma).

Intercity Passenger Rail Service

Amtrak's Heartland Flyer intercity train is a state-supported service that links Oklahoma City with Fort Worth, with intermediate stops in Norman, Pauls Valley, Ardmore, Purcell, and Gainesville (Texas). The service operates daily. However, one weekend per year a train operates through to Dallas for the University of Oklahoma-Texas football game. In addition, there is Amtrak Thruway bus service connecting Oklahoma City to Newton, Kansas, where passengers can connect to the Southwest Chief which operates between Kansas City and Los Angeles. The connecting bus service is operated under contract by Village Tours. In Fort Worth, passengers can connect to the three-day per week Chicago-San Antonio Texas Eagle service (with connecting cars to Los Angeles from San Antonio) and the Trinity Railway Express service between Fort Worth and Dallas.[2]

Fixed Guideway Systems

Fixed guideway refers to public transit that uses dedicated right-of-way such as rail tracks, catenaries, overhead wires, or bus-only lanes. In December 2018, the Oklahoma City Streetcar began service on the state's first fixed guideway streetcar service, providing two routes along 4.86 miles in and around downtown Oklahoma City. During 2019, the streetcar provided approximately 400,000 trips. Fares are $1 per trip and all EMBARK universal passes are accepted. Oklahoma River Cruises also provides seven miles of fixed guideway ferry service along the Oklahoma River. Fares are $12 for a day pass. The streetcar and ferry are part of EMBARK's family of services in Oklahoma City.

2 https://www.ok.gov/odot/documents/OK_StateRailPlan_Final_2018.pdf

SERVICE AND RIDERSHIP TRENDS

Oklahoma's transit agencies carried 10,470,020 passenger trips in 2018.[3] This represents a 9% decrease from 2014, when the state's transit agencies served just more than 10.5 million trips (Figure 4-10). This decline is similar to the national trend of declining transit ridership, which fell by nearly 8% between 2014 and 2018.[4]

About 25 of the state's 35 transit agencies experienced a decrease in ridership during this time, while 10 transit agencies saw a ridership increase. Total ridership among urban systems declined slightly during this time, while ridership on rural systems experienced a more significant decline. Ridership on tribal services increased slightly during this period.

As of 2018, most passenger trips in Oklahoma are carried by urban transit services, representing 7,655,793 passenger trips in 2018, or 73% of all passenger trips. Rural transit agencies carried 24% of all passenger trips in 2018, and tribal transit services carried about 3% of trips.

While many of the state's transit agencies experienced ridership declines, about 90% of the state's net loss in riders occurred among just six transit agencies: Tulsa Transit, OSU/Stillwater Community Transit System, KI BOIS Area Transit System (KATS), Southern Oklahoma Rural Transit System (SORTS), Lawton Area Transit System (LATS), and Red River Public Transportation Service.

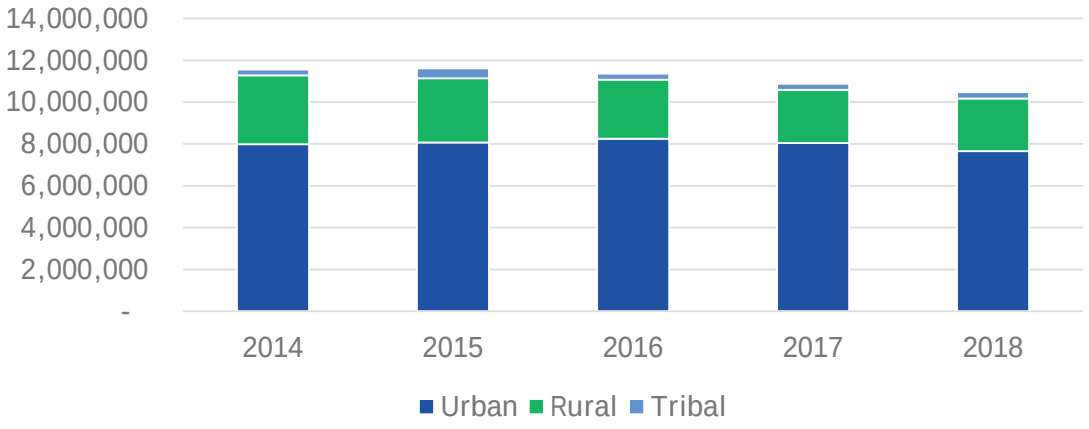
Transit agencies in Oklahoma operated nearly 1.7 million hours of service in 2018 (Figure 4-11). The largest share of transit service hours is operated by rural systems, which operated 57% of all service hours in 2018. Urban systems operate 35% of all transit service hours in the state, while tribal systems operate 8% of the state's hours of transit service. Since 2014, total hours of service decreased by about 3%. However, this decline is attributable to decreased hours of service among rural systems, which experienced an 8.7% decrease in service hours. Urban systems increased service hours by 2.5%, and tribal systems increased service hours by 24%.

Changes in service and performance are also notable between different types of services. Figure 4-12 shows that small and large transit agencies operating both fixed-route and demand-response service increased service hours and experienced increased ridership between 2014 and 2018, while agencies operating only demand-response service experienced declines in both service hours and ridership. The decline was particularly stark among smaller demand-response transit agencies, for whom overall service hours and ridership declined by more than 20%.

3 US Department of Transportation, FTA, National Transit Database (NTD)

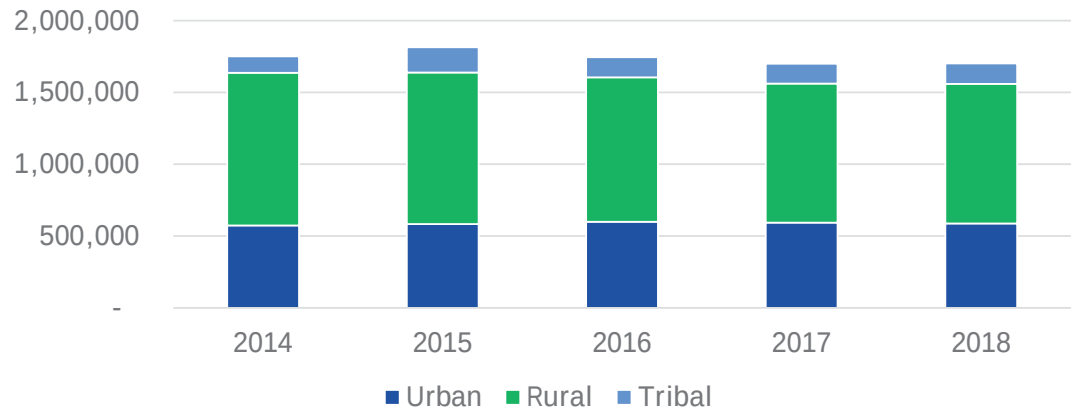
4 Ibid.

Figure 4-10 Annual Passenger Trips in Oklahoma, 2014 – 2018



Source: NTD

Figure 4-11 Annual Hours of Transit Service in Oklahoma, 2014 – 2018



Source: NTD

Figure 4-12 Service and Performance Trends: Averages by Type of Transit Service

	Agencies Operating Demand-Response Services ONLY		Agencies Operating Fixed-Route Services and Demand-Response	
	Small	Large	Small	Large
Annual Revenue Vehicle Hours per Capita (2018)	0.46	0.29	0.45	0.41
Change in Revenue Vehicle Hours (2014-2018)	-23.2%	-5.9%	10.8%	3.4%
Change in Ridership (2014-2018)	-29.9%	-3.0%	2.8%	4.4%
Passengers per Revenue Vehicle Hour	3.0	2.2	7.4	12.7
Operating Cost per Revenue Vehicle Hour	$38.10	$47.20	$49.80	$95.30
Operating Cost per Passenger	$13.00	$25.10	$10.70	$7.40

Source: NTD

TRANSIT FUNDING IN OKLAHOMA

Transit services in Oklahoma are funded through some combination of federal, local, and state funds, plus fares, contracts, and other resources, such as grants and other financial assistance. Within this general formula, however, there is a lot of variation in how individual transit agencies fund their systems. Transit service requires two types of investments: operational and capital.

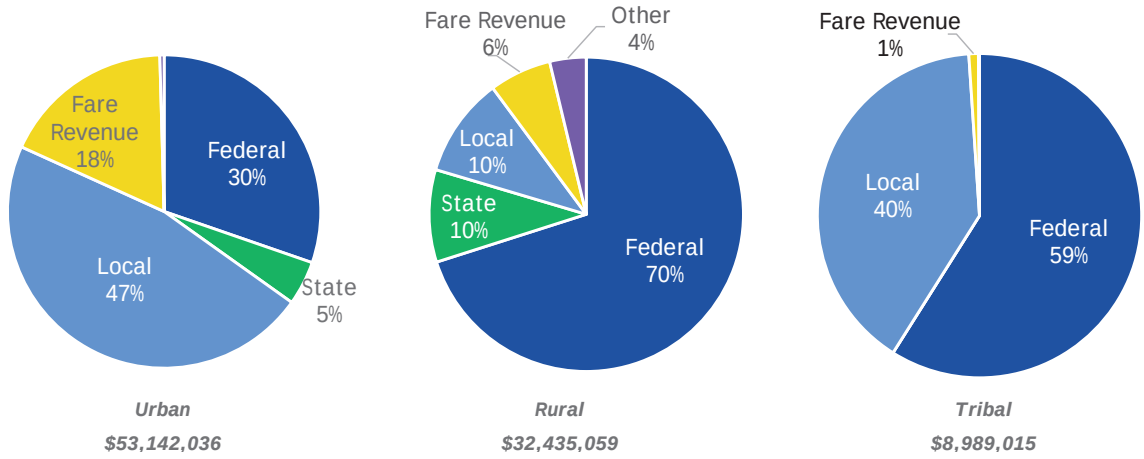
Operations funding includes driver wages and fuel (among other inputs) and reflects the actual service delivery. Federal funds can support up to 50% of operating costs depending on fleet size and service area population. Capital funding includes fleet purchases and other physical investments. Federal funds are used by both urban and rural transit agencies for capital expenses; these funds normally require a 20% match.

FTA formula funds can be used to cover a large portion of fleet and other infrastructure expenses, such as vehicle purchases, passenger infrastructure, and investments in technology. Some agencies use the revenue from contracted services, such as trips provided through LogistiCare, to meet federal match requirements for operations and fleet purchases. For some transit agencies, these contracts often serve as the only source of local match funds.

Statewide, transit providers in Oklahoma spend roughly $94.6 million annually to operate service.[5] About 34% of this operating funding is from local sources, such as local county and municipal funds, while 47% of funding is from the federal government. Another 6% of funding for transit comes from the state of Oklahoma. The remaining 13% comes from passenger fares and other sources. Figure 4-13 breaks this down further and provides the sources of operating funds by urban, rural, and tribal agencies. Rural and tribal programs rely on federal operating assistance twice as much as urban service providers.

5 This amount represents the total transit service operating costs as reported to NTD for fiscal year 2018, the most recent data available at the time of the study.

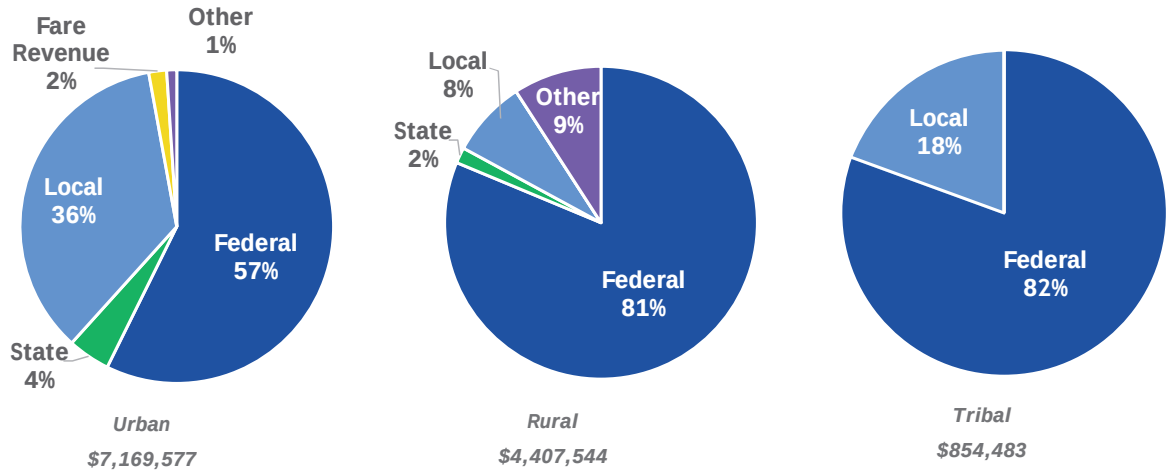
Figure 4-13 Sources of Operating Funds for Urban, Rural, and Tribal Transit Service Providers (2018)



Source: NTD

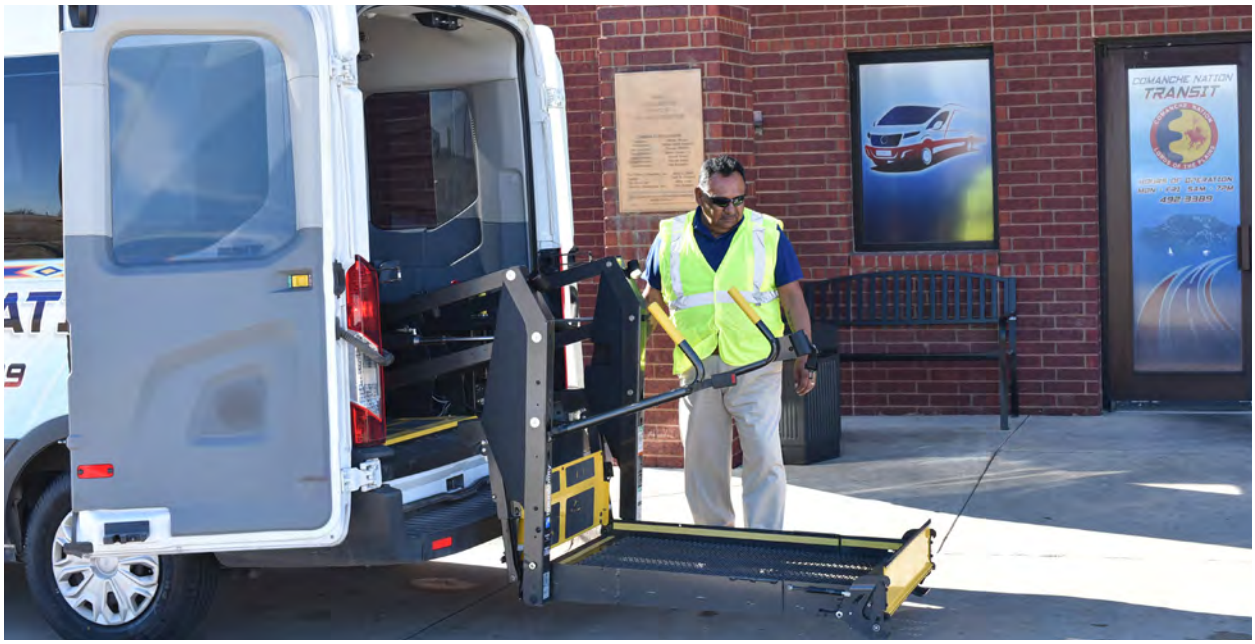
From 2014 to 2018, transit providers spent on average $12.4 million per year on capital expenditures. Approximately 67% of these capital funds are from the federal government, while 25% of funding is from local sources. Another 3% of capital funding for transit comes from the state of Oklahoma. The remaining 5% comes from passenger fares and other sources. Figure 4-14 breaks this down further and provides the sources of capital funds by urban, rural, and tribal agencies. Similar to operating assistance, rural and tribal service providers rely on federal assistance more heavily than urban service providers. Local funds comprise a much greater share of investment in capital funds for urban providers compared to rural and tribal providers.

Figure 4-14 Sources of Capital Funds for Urban, Rural, and Tribal Transit Service Providers (Annual Average 2014-2018)



Note: This figure excludes $97 million in capital funds between 2016-2018 for the EMBARK streetcar project.

Source: NTD



AVAILABILITY OF TECHNOLOGY

Technology plays an increasingly important role in helping transit agencies to run efficiently and for conveying information about services to current and potential riders. As part of this study, the availability of transit technologies by the various transit agencies was inventoried. Oklahoma's largest fixed-route systems are, for the most part, technology capable. In some cases, transit agencies without certain technologies are in the process of obtaining new technology, such as scheduling and dispatching software.

ODOT makes two propriety software available to rural transit agencies in the state: MYLEOnet and TransitAssistant. MYLEOnet, as mentioned previously, is an application designed for all elements of data collection for the state's 5311 transit services. TransitAssistant is available in both a desktop and mobile version. TransitAssistant Desktop is an application for scheduling, dispatching, and data collection by transit agencies. TransitAssistant Mobile is an Android application that can be used by operators to collect ridership data and by dispatchers to schedule trips and monitor rider trip activity. At least five transit agencies take advantage of TransitAssistant and use it in their operations, while other transit agencies have invested in more advanced technologies for a variety of purposes, including scheduling software, automatic vehicle location (AVL), GPS systems, and real-time arrival information for customers. Some agencies cited the cost of software as a barrier to acquiring technologies to enhance their operations.

HUMAN SERVICES TRANSPORTATION

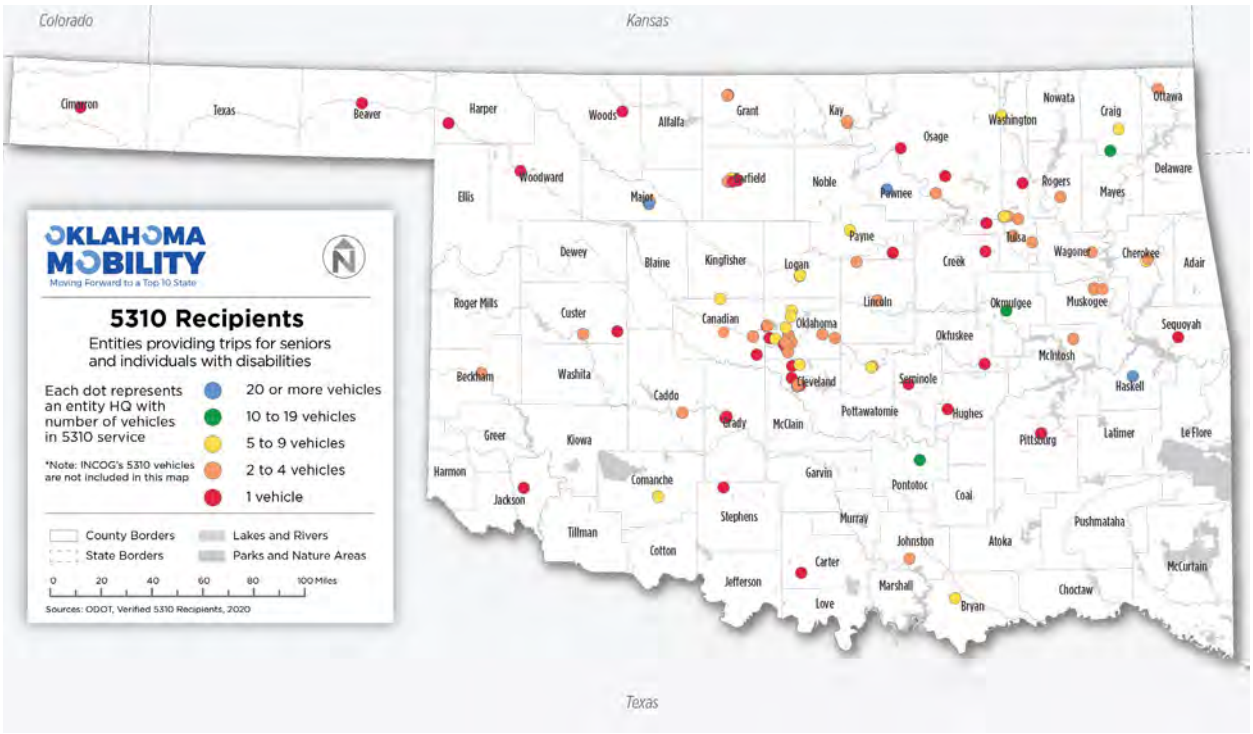
Public transit agencies across Oklahoma play a vital role in providing trips for older adults, disabled persons, and/or people with lower incomes. In recognition of the transportation needs of these individuals, the FTA provides additional resources through the FTA section 5310 program to states to support private, non-profit entities to expand resources where public transit options may be unavailable or unable to meet these needs.

ODOT distributes these funds for the purchase of vehicles for both non-profit and transit agencies to provide trips for older adults and individuals with disabilities. These funds were previously managed and distributed through DHS. Since July 2019, the program has been overseen by OMPT to better coordinate and align services across the state. There are approximately 100 program recipients (Figure 4-15), including 12 transit agencies who use these funds to supplement their fleet to provide additional services within their communities for these targeted populations. In 2020, 396 vehicles were identified as being in service through this program.[6]

Additionally, the OHCA administers the Medicaid program for the state and has oversight of NEMT services through the SoonerRide program. Since 1999, Oklahoma has used a statewide broker to operate its NEMT program, currently contracting with LogistiCare Solutions, LLC. To operate the statewide brokerage, LogistiCare contracts with a variety of transportation providers. In 2019, there were 932,264 trips taken through this program, or an average of 3,570 trips daily. The average trip length was 23 miles one way. Less than 1% of these trips were taken by fixed-route bus, but about 26%, or 240,483 trips, were provided by a combination of nine rural transit agencies and three organizations with vehicles purchased through the 5310 program. Based on data provided by LogistiCare, SoonerRide is predicting a 24% increase in members once Medicaid expansion is implemented.

6 INCOG has vehicles that are not represented here and in Figure 4-15.

Figure 4-15 5310 Funding Recipients in Oklahoma (Headquarter Address)



OFFICE OF MOBILITY AND PUBLIC TRANSIT

The creation of the OMPT at ODOT was mandated by HB 1365. HB 1365 charged OMPT with overseeing a network of public transit systems that receive adequate funding to ensure the mobility needs of all Oklahomans are met in a safe, affordable, reliable, consistent, and coordinated fashion. State law requires that oversight and management of all FTA programs, not administered by an FTA-recognized direct recipient, fall under the jurisdiction of OMPT, including the FTA section 5310 program which was transferred from DHS to OMPT by the bill.

As prescribed by the law, OMPT administers or is involved with the following federal programs:

- Section 5303, 5304, and 5305 Metropolitan and Statewide and Nonmetropolitan Transportation Planning
- Section 5307 UZA Formula Grants[7]
- Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program[8]
- Section 5311 Formula Grants for Rural Areas[9]
- Section 5329(e) State Safety Oversight (SSO)
- Section 5339 Grants for Buses and Bus Facilities Program[10]

OMPT relies on FTA and ODOT policy guidance in managing its transit funding programs as mandated by FTA. Guidance for the state's administration of the FTA section 5311, 5339, 5303, and 5304 programs is provided by the OMPT 2020 SMP. The FTA section 5310 program has a separate guidance document—the 2020 Section 5310 SMP. The SSO Program also has a separate revised January 31, 2020 Program Standard governance document.

In Oklahoma, FTA also provides funding directly to five transit programs in areas with more than a 50,000 people under the FTA section 5307 program for UZAs: Oklahoma City, Edmond, Norman, Lawton, and Tulsa. While these programs are direct recipients of funding from FTA, OMPT oversees the small urban program budgets and the state funding program for them as well as the programs managed by OMPT.[11]

ODOT, as the Governor's designee with regard to the administration of state-managed FTA programs, is charged with the responsibility of actively pursuing available funds under these programs for the development and maintenance of public transit services, and to disburse these funds to eligible local transit operators and planning organizations throughout the state of Oklahoma. The responsibility for the administration of these programs is vested in OMPT.

It is the responsibility of OMPT to:

- Distribute information concerning these programs.
- Provide technical assistance and training.
- Develop a fair and equitable competitive application process for FTA funds.
- Ensure public transit availability statewide.
- Review and monitor transportation program subrecipients who have received FTA and state program funds—including the expanded role of the SSO program.
- Submit an Annual Program of Projects to the FTA for approval.

7 The ODOT OMPT does not have oversight or management responsibilities for the FTA section 5307 direct recipients of FTA funding. It does have to file a letter with FTA designating the formula funding split for the FTA section 5307 subrecipients (between 50,000 and 200,000 population) and it is responsible for ensuring that they have a TAM plan and a Planning Technical Assistance Program (PTAP).

8 INCOG, the MPO for the Tulsa area, is the designated direct recipient of FTA section 5310 funds for that region, and it manages and oversees its own separate program including applications, coordination planning, grants and compliance. ODOT's OMPT performs those same functions for the rest of the state.

9 FTA section 5311(c) recipients (federally recognized tribes) are direct FTA recipients and do not pass through OMPT.

10 OMPT does not have oversight of urban and tribal systems for FTA section 5339 funds.

11 FTA also allocates a portion of the formula funding for the Fort Smith, Arkansas UZA to Oklahoma for the portion of the service area that is in Oklahoma. This funding is administered by OMPT.

THE MARKET FOR TRANSIT IN OKLAHOMA

As part of this Plan, the project team was tasked with evaluating the factors that influence transit need and demand, with the goal of developing strategies that improve mobility for all Oklahomans in every community. Transit is the backbone of vibrant urban communities and a lifeline in rural ones. By assessing the market for transit, this Plan aims to identify the places where people need access to healthcare, jobs, education, shopping, recreation, and other activities, as well as where transit impacts economic growth and is a viable alternative to driving

This analysis assumes that public transit investment is oriented around two primary goals:

1. **Strengthening the vitality of Oklahoma's economy** so as many people as possible have access to Oklahoma's commercial centers, employment centers, tourist destinations, and educational resources. This means employers have access to Oklahoma's talent pool, and Oklahomans have a reliable and affordable way to get to work. Access to commercial and employment centers is equally important for people living in urban and rural areas, although the systems will be different in each location. Equally important is the interconnection between the commercial and employment centers in the urban and rural communities.
2. **Supporting Oklahoma's most vulnerable individuals,** including older adults, people with disabilities, minorities, and people with low incomes, by providing mobility and access to services. Public transit is critical in helping people access basic services such as healthcare, human services, and education. Transit's role in this effort is equally important in both urban and rural areas, while service may look and operate differently in urban and rural environments.

Different Services for Different Contexts

There is no "one-size-fits-all" solution to address the variety of transit needs in Oklahoma. In every part of Oklahoma, there are residents who cannot reach jobs and basic services on their own. These needs may be local, regional, or they may stretch across the state. There is also a need to connect all Oklahomans to services designed to meet the needs of specific populations. These services may be provided by federal and state human service programs (e.g., Medicaid) and are typically available statewide, but trips are limited to and from specific appointments and activities. A truly accessible and connected public transit system would include transportation services available to any member of the public traveling for any purpose.

Assessing the Transit Market

To understand the market (or need) for transit in Oklahoma today, the project team considered a variety of factors, including demographics, development patterns, major activity centers, and travel flows. Together, these elements help to identify where there is need for transit and what kind of services are needed. They also provide insight into what types of service models may best fit different needs and service environments across the state. It is always difficult to quantify the need for public transit services; there are always exceptions to every rule and sometimes transit services succeed where one might not expect them to and fail where they should work. However, national experience suggests that the underlying market for transit is strongly related to six factors:

Population and Population Density: First and foremost, transit serves people, and understanding where people live is a key factor to knowing where service needs to go.

Employment and Employment Density: The location and density of jobs is also a strong indicator of transit demand. This includes not just metro centers, but also large employers outside of cities as well as schools and healthcare facilities.

Socioeconomic Characteristics: Different people have a different likelihood to use transit, with differences tied to socioeconomic characteristics. For example, households with many cars are much less likely to use transit than those with one or none.

Development Patterns: Development and land use patterns have a significant impact on the types of transit service models that are most likely to offer effective service in different types of communities, including large urban, small urban, and rural settings.

Important Activity Centers and Resources: Large employers, hospitals, universities, and other major destinations can generate transit ridership. Transit users traveling to these places may be from nearby or from farther away across the region, meaning different types of service can provide connections to these places.

Travel Flows: For transit to be effective, it must take people from where they are to where they need or want to go. Travel flows show the trips that people make and indicate where transit can or should provide service.

TRANSIT NEEDS ACROSS OKLAHOMA

Demographic and socioeconomic characteristics, or an analysis of transit reliance, help identify the need for transit service. National research shows that many population groups have a higher propensity for transit use than the overall population.

In other words, certain population groups are more likely to use or rely on transit relative to the general population. Socioeconomic characteristics that are related to transit propensity include:

Vehicle Ownership and Access

Households with limited or no access to a personal vehicle, either by choice or by necessity, are more likely to rely on transit. Residents may need transit as their primary form of transportation due to the high cost of vehicle ownership or may be unable to drive due to a disability. Residents in places with more robust transit services may choose to use transit because it is a convenient and cost-effective way to get where they need or want to go for at least some of their trips.

Income

Residents with lower incomes tend to use local transit to a greater extent because it is less expensive than owning and operating a personal vehicle, and many rely on transit as their primary mode of transportation.

Age

Older adults (age 65 and over) may no longer be comfortable driving or are no longer able to drive and may begin or continue to use transit to maintain their independence as they age. On the other hand, Millennials (age 25-34) generally have a higher interest in using many transportation options such as transit, walking, and biking, and less interest in driving.

Disability

Many residents with disabilities may be unable to drive or have difficulty driving and may be more likely to rely on transit and paratransit services to meet their transportation needs and maintain an independent lifestyle.

Race and Ethnicity

Minority residents generally have higher rates of transit use. Providing effective transit service to minority populations is particularly important to the FTA and is a requirement under Title VI of the Civil Rights Act of 1964.

Transit Propensity Index

To better understand transit needs across the state, the project team developed a Transit Propensity Index, a single measure that estimates the extent to which a specific area (such as a census tract) may have a sizeable proportion of the population with characteristics related to transit usage.

The following five characteristics were combined into the Transit Propensity Index:

- Low-income residents, defined as households with income at or below 150% of the federal poverty level
- Persons with disabilities
- Older adults, 65 years or greater of age
- Minority residents
- Households with zero or one vehicles

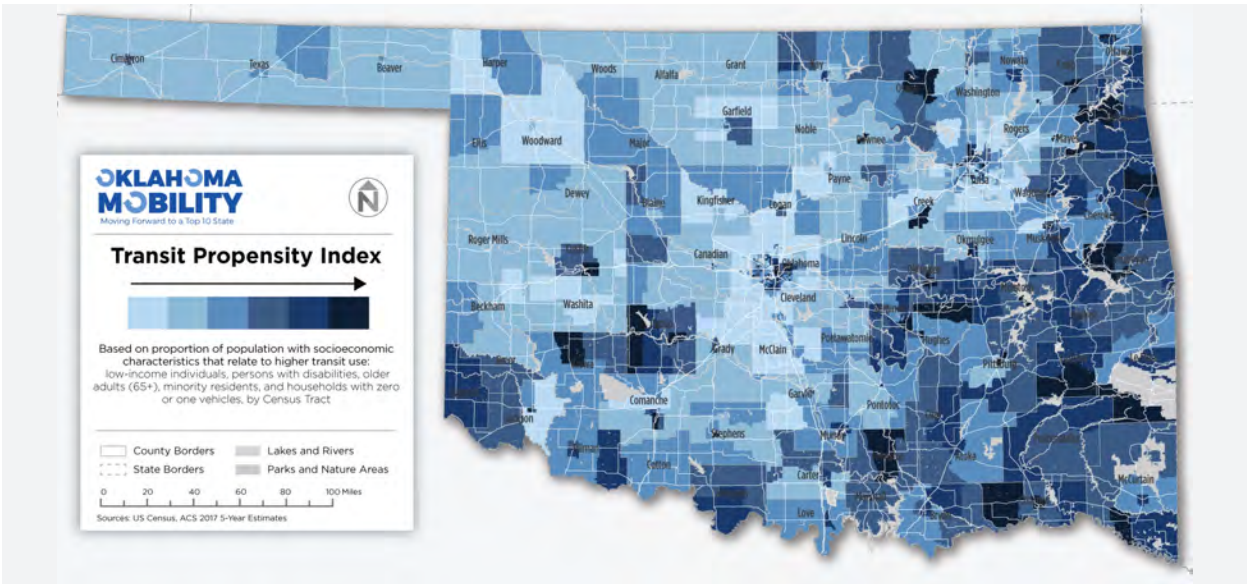
The Transit Propensity Index purposefully excludes population density as a factor and does not recommend the type or level of transit service that should be provided. Rather, it highlights places where there are high proportions of people more likely to rely on transit service, regardless of what type of transit may be appropriate to meeting those needs and how many people live there. The results of the transit propensity analysis are shown in Figure 4-16. Areas that stand out in the analysis include:

- Counties in the southeastern part of the state, such as Johnston, Choctaw, McCurtain, Latimer, Le Flore, Seminole, Okfuskee, Bryan, and McIntosh counties
- Counties in the southwestern part of the state, such as Harmon, Kiowa, Custer, Caddo, Tillman, and Jefferson counties
- Counties in the northeastern part of the state, such as Sequoyah, Adair, Delaware, Craig, and Osage counties
- The eastern and southern parts of Oklahoma City
- The northern parts of Tulsa
- Lawton
- Blaine County
- Central Custer County
- Texas County and central Cimarron County

Additional Transit Propensity Index maps for specific geographic areas can be found in Appendix D.

Key Finding: The needs for transit investments are growing. The need and demand for transit is changing, both in response to underlying demographic changes in Oklahoma's population and because of the regionalization, or concentration, of jobs and healthcare services outside of rural communities.

Figure 4-16 Transit Propensity Index



DEVELOPMENT PATTERNS

Research shows that density and demographics are key factors in the type of transit service that will work well in a particular area. There are a wide variety of transit services, each one with different strengths and weaknesses, and each designed to serve different types of communities and riders. Transit propensity, as described in the previous section, is a major component of transit need and demand across Oklahoma. Density and development patterns are also critical to understanding the state's transit context and can influence the types of transit service that can most effectively serve different types of communities.

Demand-response service can generally work in any environment, and different models can provide service for the general public or to meet the needs of specific populations or types of trips.

Fixed-route service, however, generally requires some level of density to be effective. Typically at least 10-15 residents per acre or 5-10 employees per acre, or a combination thereof, is necessary to support fixed-route service that operates at least once an hour. Population and employment density are key indicators of an area's development patterns and provide insight into the types and level of service that may be appropriate for different contexts.

Population

As of 2017, 3,896,251 people called Oklahoma home.[12] About 62% of the state's population is focused in the major urban areas, particularly the Oklahoma City and Tulsa regions. The remaining 38% live in smaller communities or more rural areas across the state.

The highest concentration of population is in the Oklahoma City Metropolitan Area, with a continuous concentration of people in Oklahoma County, east Canadian County, northwest Cleveland County, and as far east as Shawnee. The Tulsa metro area also has a large population, with high concentrations of people focused across most of Tulsa County and in neighboring portions of Wagoner, Rogers, and Creek counties.

Additional municipalities with notably high concentrations of people include:

- Lawton/Fort Sill
- Stillwater
- Muskogee
- Enid
- Ponca City
- Bartlesville
- Tahlequah

Between 2010 and 2017, areas with the highest increases in population were the greater Oklahoma City and Tulsa regions, as well as the Lawton area. The Oklahoma City metro area grew significantly, growing by 8.0% between 2010 and 2017, while the Tulsa area grew by 4.3% and the Lawton area increased 4.0% (Figure 4-17). Notably, smaller areas within Oklahoma City and Tulsa experienced a mix of population growth and loss, with some core areas of each city increasing in population density while others declined during the same period. At the same time, the suburbs and surrounding communities outside these cities experienced significant increases in population, speaking to the expansion and urbanization of these metropolitan areas (Figure 4-18).

12 2017 American Community Survey 5-Year Estimates

Key Finding: Oklahoma's population is growing at a similar rate to the country, but growth is concentrated in the urban areas. Since 2010, Oklahoma's population growth rate has mirrored the nation's overall growth rate, though the growth is heavily concentrated in the Oklahoma City and Tulsa metropolitan areas.

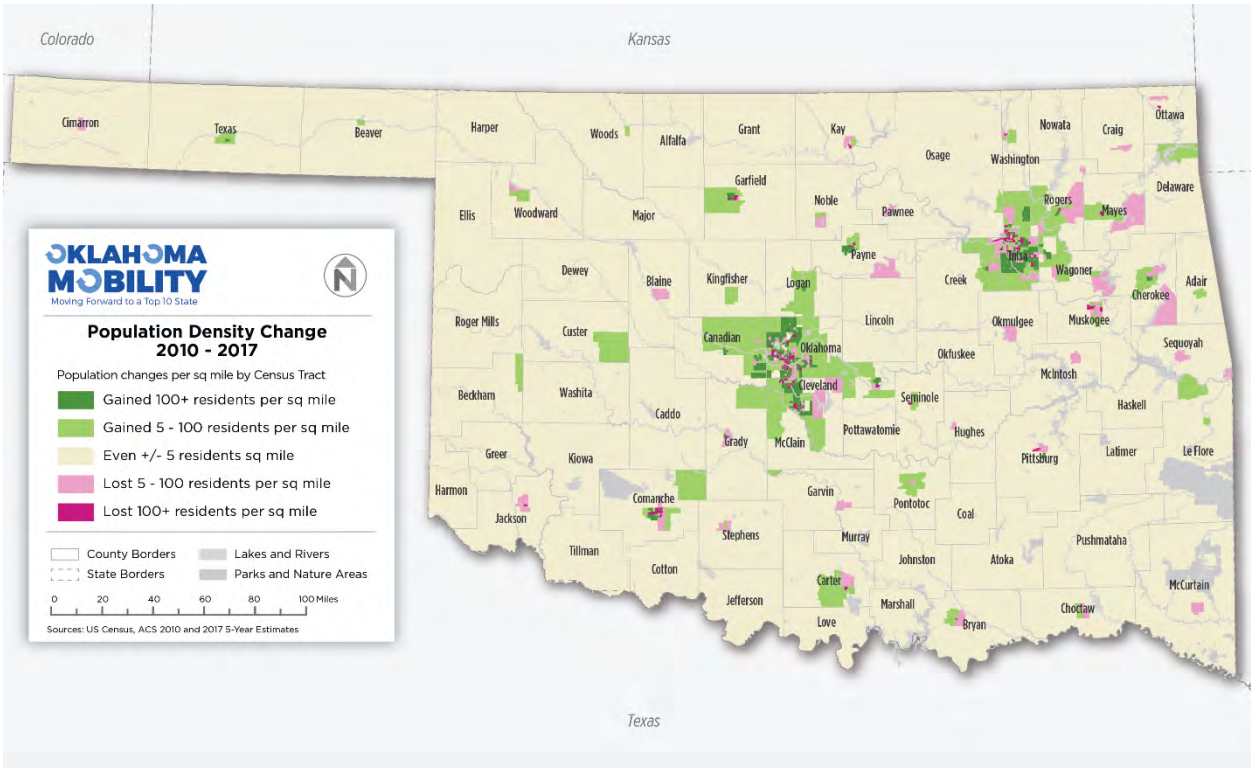
Figure 4-17 Population Growth in Major Metro Areas, 2010 to 2017

	State of Oklahoma	Oklahoma City-Norman MSA	Tulsa MSA	Lawton MSA	Enid MSA	Stillwater MSA	Non-Urban/ Rural
2010	351,351	1,252,987	937,478	124,098	60,580	77,350	1,487,493
2017	3,896,251	1,353,504	977,869	129,066	62,421	80,634	1,496,356
# Change	+144,900	+100,517	+40,391	+4,968	+1,841	+3,284	+8,863
% Change	3.9%	8.0%	4.3%	4.0%	3.0%	4.2%	0.6%

Source: 2010 Census Summary File, 2017 ACS 5-Year Estimates

Oklahoma City MSA, Tulsa MSA, Lawton MSA, and Enid MSA are all Metropolitan Statistical Areas as defined by the US Census. The City of Norman is considered part of the Oklahoma City MSA by the US Census. Stillwater MSA is a Micropolitan Statistical Area.

Figure 4-18 Change in Population, 2010 to 2017



Employment

The location and density of employment complements population as an indicator of where people need or want to go and the type of transit service that may be needed based on density and pattern of development. In addition to showing where people need to commute, employment density is also a simple way to represent other types of potential travel activity; for example, the destinations where restaurant and retail employees need to travel are also the same places where customers are traveling. The same is true for hospital employees and patients traveling to medical care. As job densities increase, so does the demand for transit service.

In 2017, there were 1,550,990 jobs across Oklahoma.[13] Notably, employment is generally more geographically concentrated than population. Employment is most highly focused in the state's urban areas: Oklahoma City and Tulsa and their immediate metro areas. High concentrations of employment are also found in Norman, Lawton, Enid, Stillwater, Woodward, Bartlesville, Tahlequah, Muskogee, Ardmore, Altus, Guymon, and Durant.

Between 2010 and 2017, employment in Oklahoma increased by 6.2%, less than half of the national rate during this same period (14.1%).[14] The Oklahoma City and Tulsa Metropolitan Statistical Areas both experienced significant increases, with jobs increasing by 8.8% and 8.1%, respectively (Figure 4-19). In these metropolitan areas, most places just outside the urban centers experienced increased job density, while changes within the core areas were more mixed. Among all of the state's metro areas, the largest increase occurred in the Stillwater region, where employment grew by 12.7%. The Lawton metro area experienced an overall employment increase of 3.9% but with a mix of increases and decreases across the area. Outside of the state's metropolitan areas, overall employment increased by just 0.3% (Figure 4-20).

Beyond the major metro areas, employment density also increased in:

- Western Mayes County, east of the Tulsa metro area
- Eastern parts of Love County
- Ardmore
- Northeast Beckham County/Elk City

Areas where employment density decreased include:

- Southern Cherokee County
- Northern Haskell County
- Central Le Flore County
- Altus
- Guymon
- Ponca City
- Miami

13 Longitudinal Employer-Household Dynamics (LEHD) program (U.S. Census, Center for Economic Studies)

14 Ibid.

Key Finding: Job growth is half the national growth rate, and is concentrated in the urban areas. Jobs are heavily concentrated in Oklahoma City and Tulsa, as well as in and around smaller urban areas such as Norman, Lawton, Stillwater, Enid, and Muskogee. Employment in the state has increased at less than half of the national rate, and this growth has also been largely concentrated in the Oklahoma City, Tulsa and Stillwater metropolitan areas.

Figure 4-19 Change in Employment, 2010 to 2017

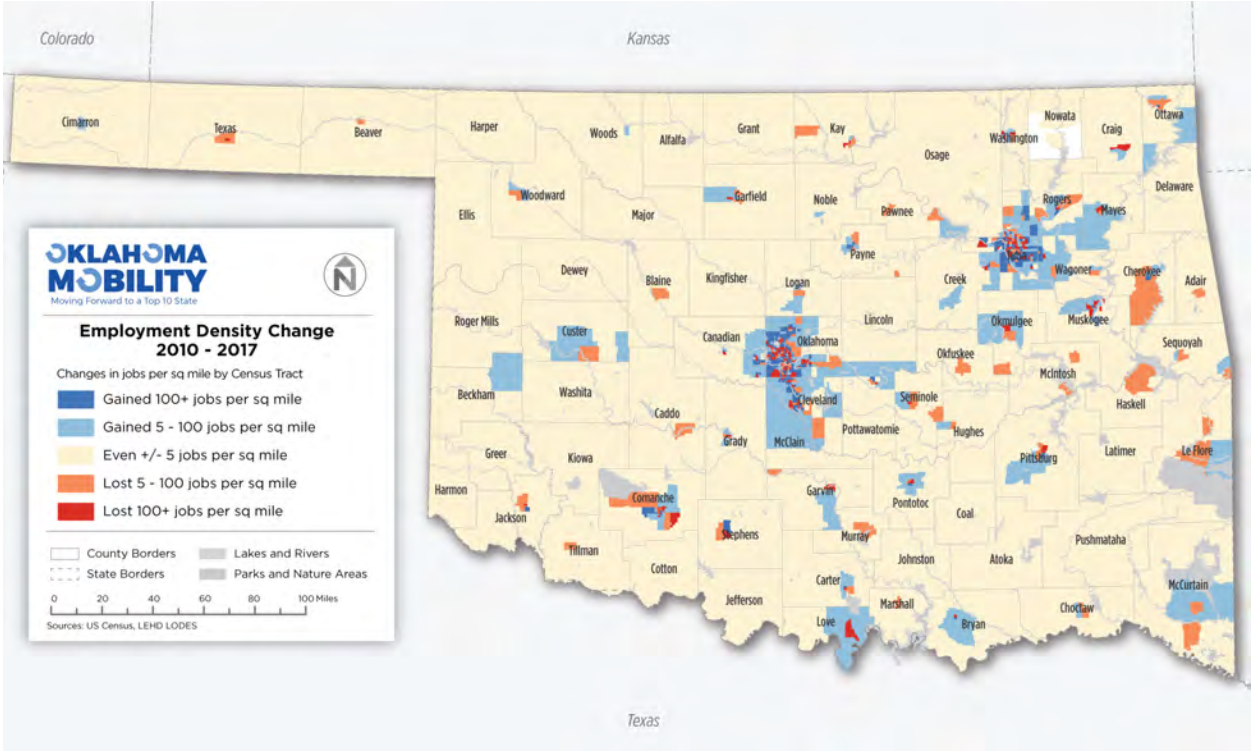


Figure 4-20 Employment Growth in Major Metro Areas, 2010 to 2017

	State of Oklahoma	Oklahoma City-Norman MSA	Tulsa MSA	Lawton MSA	Enid MSA	Stillwater MSA	Non-Urban/ Rural
2010	1,460,741	546,958	408,647	38,348	24,642	30,486	502,063
2017	1,550,990	595,050	441,628	39,835	25,080	34,354	503,451
# Change	+90,249	+48,092	+32,981	+1,487	+438	+3,868	+1,388
% Change	6.2%	8.8%	8.1%	3.9%	1.8%	12.7%	0.3%

Source: Longitudinal Employer-Household Dynamics (LEHD) Survey (US Census Bureau, Center for Economic Studies)

Oklahoma City MSA, Tulsa MSA, Lawton MSA, and Enid MSA are all Metropolitan Statistical Areas as defined by the U.S. Census. The City of Norman is considered part of the Oklahoma City MSA by the U.S. Census. Stillwater MSA is a Micropolitan Statistical Area.

Transit and Development Patterns

The project team linked density to transit demand by creating an index that combines population and employment density, and then broadly relating these densities to the most appropriate types of transit service. Generally, there is no minimum density requirement for demand-response service. Demand-response service can work in any environment and can be deployed in a variety of ways to provide service for the general public or to meet the needs of specific populations or types of trips, depending on need. Fixed-route service, however, does generally require some level of density to be effective.

When considering the population and job densities needed to support fixed-route bus service (Figure 4-21), the highest potential demand in Oklahoma is located in a few specific areas of the state. These include Oklahoma City and its surrounding cities such as Norman, Edmond, Shawnee, and Yukon, as well as the urban areas of Tulsa, Lawton, Enid, Stillwater, and Tahlequah. These communities have areas of contiguous job and population density that can support the hourly (or more frequent) service of traditional fixed-route transit. Beyond these areas, additional types of transit service should be considered to meet the needs of communities that is appropriate to the local and regional service environment while effectively meeting community needs. Different types of service models, such as demand-response service or regional connectors, can provide transit service that matches the needs and goals of Oklahoma's communities.

Key Finding: Both urban and rural communities have residents who rely on transit. The Transit Propensity Index, based on socioeconomic characteristics associated with a greater tendency to use public transit, shows that there are large populations that rely heavily on transit in the central portions of the Oklahoma City and Tulsa metropolitan areas, the Lawton-Fort Sill UZA, and the City of Muskogee. In the rural communities, there are fewer people overall; however, some groups with a higher propensity to use transit, including older adults, low-income residents, and people with disabilities, make up a higher percentage of the population in rural areas as compared to the state average.

Figure 4-21 Transit Service Hierarchy

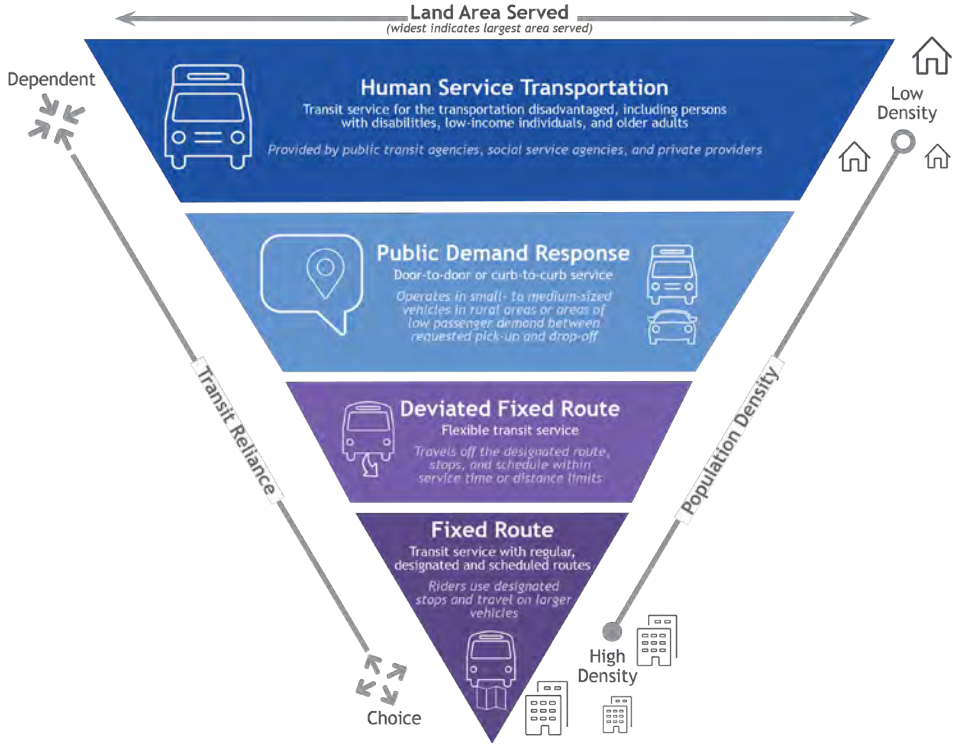


Figure 4-22 Hospitals in Oklahoma

ACCESS TO NEEDED SERVICES

Healthcare Facilities

Transportation is often cited as a major barrier to accessing healthcare services. Limited access to medical services can lead to missed medical appointments, poor health outcomes, and higher healthcare costs. Figure 4-22 shows the location of hospitals across Oklahoma. This map is not representative of all healthcare facilities across the state but illustrates a concentration of services in Oklahoma City and Tulsa. According to the Health Resources and Services Administration, Oklahoma has the following rural health care facilities:

- 40 Critical Access Hospitals
- 93 Rural Health Clinics
- 85 Federally Qualified Health Center sites located outside of UZAs
- 46 short-term hospitals located outside of UZAs

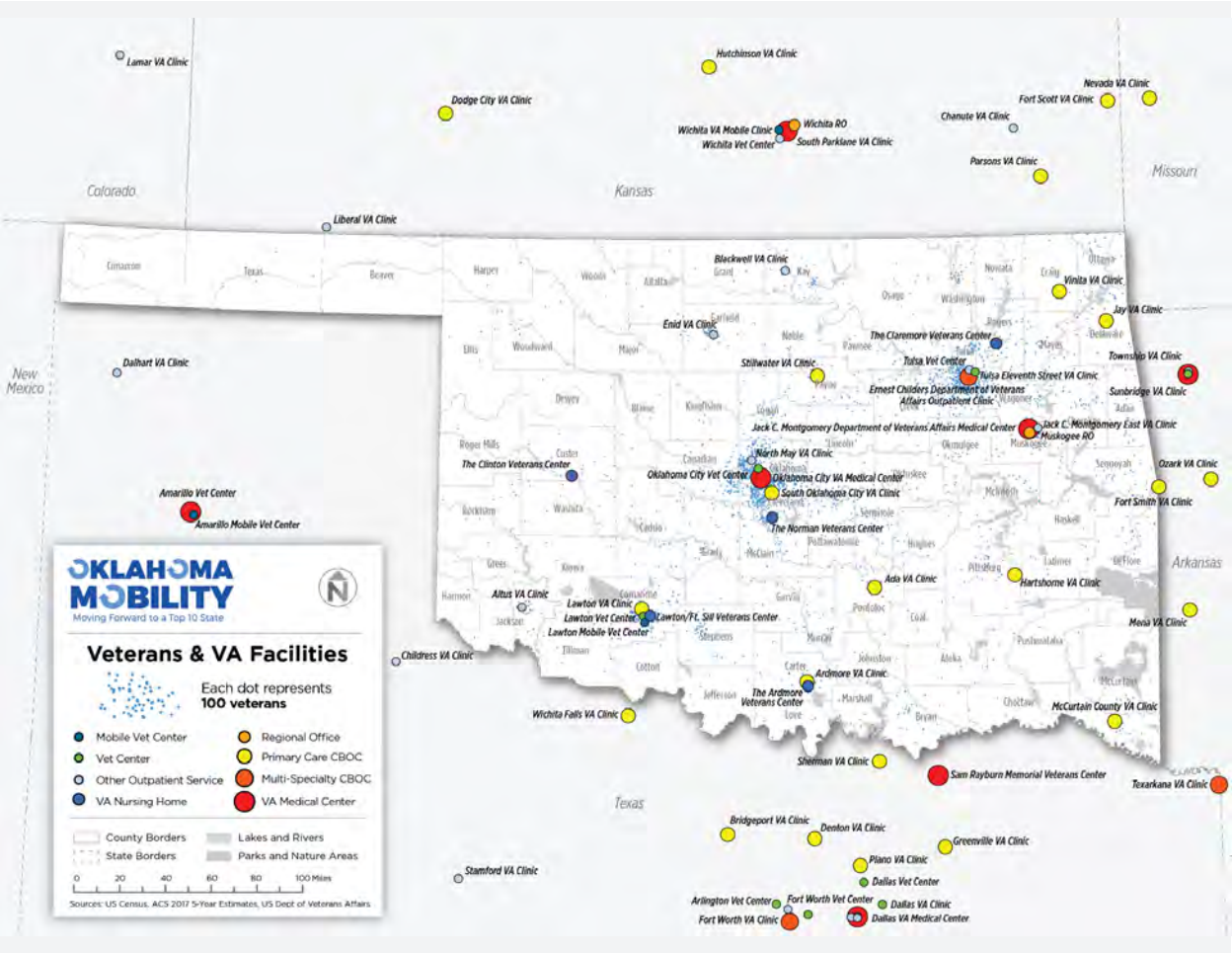
Access to medical services is also critical for Oklahomans enrolled in SoonerCare, the state's Medicaid program. As of March 2020, there were 785,366 residents enrolled in SoonerCare, and 67% of those enrolled are children.[15] In June 2020, voters approved a ballot measure expanding SoonerCare to childless adults earning up to 138% of the poverty level. SoonerRide provides well over a million rides annually to medical appointments.[16]

15 LogistiCare

16 OHCA

Key Finding: Healthcare services are becoming more difficult to access in rural areas. Historically, residents of rural and smaller urban areas had access to the services and facilities they needed within their community. More recent trends show, in response to shrinking populations and shifting demographics, many smaller urban and rural areas are experiencing a consolidation of their services and facilities, such as hospitals and healthcare services (as well as shopping areas and employment centers). Consequently, travel patterns increasingly require transit agencies to cross county lines and coordinate services with neighboring agencies.

Figure 4-23 Veterans and VA Facilities



Veteran Facilities

Oklahoma is home to 276,948 veterans, with most concentrated in the greater Oklahoma City, Tulsa, and Lawton metropolitan areas as well as in other smaller cities across the state.[17] The VA operates several types of facilities across Oklahoma to meet medical and other needs of veterans. Facilities range in scale from full-scale medical centers to nursing homes and mobile care centers and clinics across the state and in neighboring states, as shown in Figure 4-23.[18]

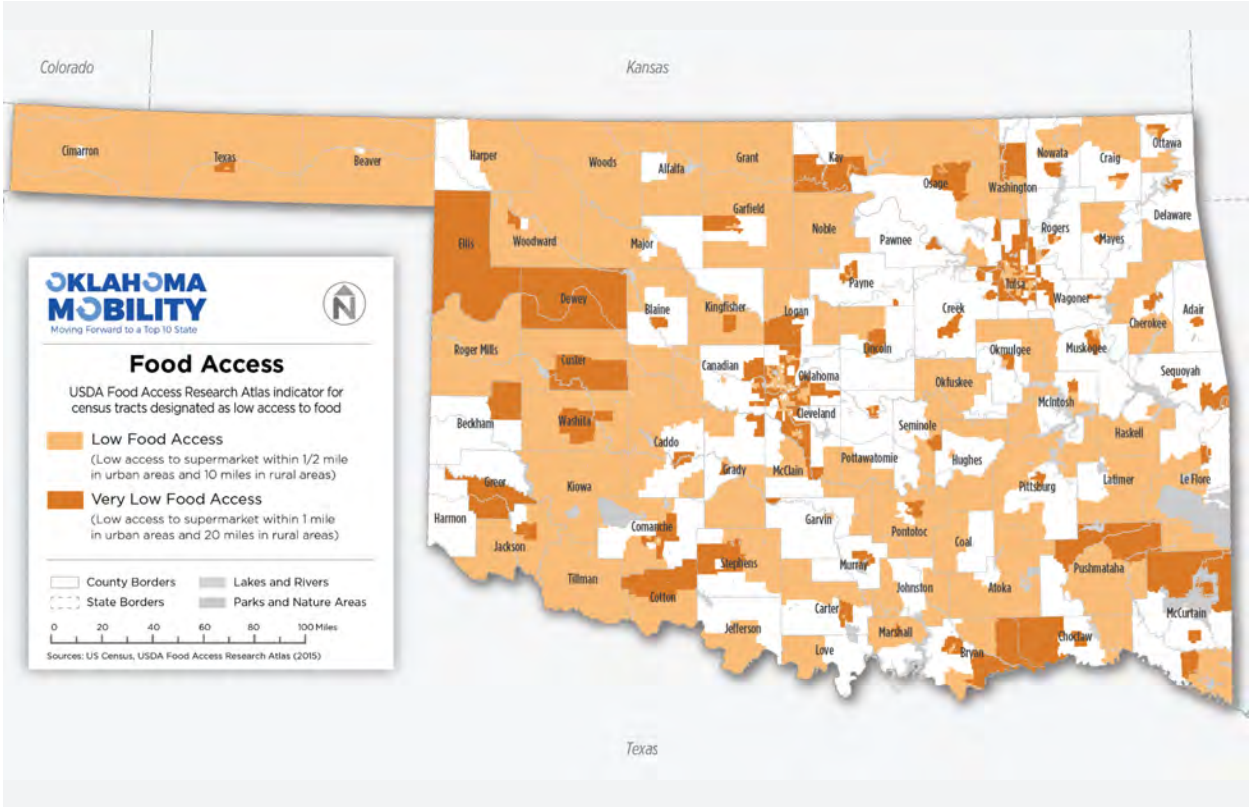
Food Access

Access to grocery stores and supermarkets with fresh food is crucial to the health and wellbeing of all Oklahoma residents. However, in areas with few or no grocery stores, accessing fresh food presents a challenge. Coupled with unreliable or non-existent transportation, this intensifies the burden and exacerbates the health and financial impacts on residents. Low-income households and those without cars are especially impacted by the inability to access the nearest grocery store.

17 2017 American Community Survey 5-Year Estimates

18 U.S. Department of Veterans Affairs

Figure 4-24 Food Access



The United States Department of Agriculture (USDA) publishes the Food Access Research Atlas, which aims to quantify access to food by census tract.[19] Census tracts are designated "low access" if at least 500 people or at least 33% of the population is farther than the specified distance from the nearest supermarket, supercenter, or large grocery store.

Figure 4-24 shows the Food Access Research Atlas index by census tract in the state of Oklahoma. Tracts that have low food access (within ½ mile in urban areas and 10 miles in rural areas) are denoted in light orange, while tracts that are very low food access (within one mile in urban areas and 20 miles in rural areas) are in dark orange. Many areas across the state demonstrate low food access, with several pockets of very low access.

Notable areas of the state that lack adequate access to supermarkets include:

- Southeast Oklahoma, particularly in Pushmataha, McCurtain, Choctaw, Bryan, Atoka, and Latimer counties
- Comanche, Stephens, Cotton, Greer, Jackson, Tillman, and Kiowa counties in Southwestern Oklahoma
- Areas surrounding the greater Oklahoma City and Tulsa metro areas
- Most areas of western Oklahoma, with areas of very low access in Ellis, Dewey, Custer, Washita, and Beckham counties
- Western panhandle, particularly in central Texas County
- Northern Oklahoma, including Kay, Osage, and Washington counties

19 US Department of Agriculture Food Access Research Atlas, 2015

ACCESS TO JOBS

Major Employers

Large employers are in many communities across Oklahoma. The largest employers—those with 10,000 employees or more—are Tinker Air Force Base in Oklahoma City, Oklahoma State University in Stillwater, and the University of Oklahoma in Norman. Other very large employers (at least 5,000 employees) include the University of Oklahoma Health Sciences Center in Oklahoma City, the US FAA Mike Monroney Aeronautical Center also in Oklahoma City, and Altus Air Force Base in Altus. Many of the state's other large employers are concentrated in the greater Tulsa and Oklahoma City metro areas, and access to these jobs requires both strong local transit service and effective regional connections for commuters from surrounding communities and rural areas.

While many of the state's large employers are focused in urban areas, there are also large employers in more rural areas, serving as key job sites for many of the state's residents. These employers represent a variety of industries, but mostly include hospitals and major medical facilities, casinos/resorts, energy and natural resource enterprises, manufacturing, and food processing. In rural areas where there are few employment opportunities, many residents travel a significant distance to reach these jobs. Reliable and affordable long-distance transportation is critical in order to connect rural residents to job opportunities in both rural and urban areas.

For transit to be effective, it must take people from where they are to where they need and want to go.

Commuter Trips Between Counties

Commuter travel flows, which show where the largest numbers of people are traveling from to get to work, are one resource to determine where direct or relatively easy connections should be made. Using commuter data available through the U.S. Census, commuter travel flows were mapped for workers who commute to another county for work to better understand where coordinated or connected transit service may be most important for job access across the state.[20]

The largest volumes of home-to-work trips are into Oklahoma and Tulsa counties from their surrounding counties (Figure 4-25). Additional maps can be found in Appendix D. There are more than 10,000 daily commute trips into Oklahoma County from Logan, Canadian, and Cleveland counties, and more than 5,000 originating in Pottawatomie and Grady counties. There are also large commuting flows traveling out of Oklahoma County, with more than 10,000 commute trips going south to Cleveland County, and more than 5,000 going to Canadian County.

Tulsa County generates more than 10,000 commute trips each from Rogers, Wagoner, and Creek counties, and more than 5,000 trips from Osage County. A significant "reverse commute" flow also exists from Tulsa County to neighboring Rogers County.

20 Census Transportation Planning Products (CTPP) Program, 2016 5-Year Estimates

Key Finding: Different transit services are needed and appropriate for different environments. The cities of Oklahoma City, Edmond, Norman, Tulsa, Lawton, Shawnee, Enid, and Stillwater have areas of job and population density that can support traditional fixed-route transit service that runs at least once an hour, and many places can support 30-minute service or better. Demand-response services are a better fit for meeting local community transportation needs in the parts of the state outside of the larger urban areas. Demand-response services use smaller buses or vans and operate trips by appointment, compared to fixed-route service which operates on a fixed schedule. Technology investments can make these reservation-based systems more "on-demand," which would increase convenience and accessibility for riders.

Figure 4-25 Inter-County Trips from Home to Work – All Commuters

Other notable commute flows are as follows:

- Trips to Muskogee County from surrounding counties, especially Cherokee, Wagoner, and McIntosh counties, as well as from Muskogee County to Tulsa County
- To Comanche County from Stephens County and Caddo County
- To Pottawatomie County from Oklahoma, Seminole, and Lincoln counties
- Between Washington County and surrounding Tulsa, Osage, and Nowata counties
- To Kay County from Osage County
- To Beckham County from Washita County

Commuters with Low Incomes

Most trips by low-income commuters are heavily concentrated in Oklahoma County and Tulsa County relative to overall commuter travel flows. The largest travel flows are between Oklahoma County and Cleveland County, with commute trips in both directions, as well as travel between Oklahoma and Canadian counties, indicating a relatively significant market for "reverse commute" trips by residents with lower incomes. Many commuter trips to Oklahoma County also originate in Logan, Lincoln, and Pottawatomie counties.

Commutes in both directions are also found between Tulsa County and Rogers, Wagoner, and Creek counties. Many commuters also travel into Tulsa County from Osage and Okmulgee counties.

Key Finding: Employment opportunities are getting farther away from rural areas. The largest volumes of commuter trips by far are into Oklahoma County and Tulsa County from their surrounding counties, respectively. When looking at just low-income commuters, there are significant flows in both directions between Oklahoma County and Cleveland and Canadian counties, indicating that there is a relatively significant market for "reverse commute" trips by residents with lower incomes.

Commuters Traveling 45 Minutes or Longer

Similar to overall commute patterns, many longer commutes into Oklahoma County originate from neighboring counties, including Cleveland, Canadian, Logan, and Pottawatomie counties. However, longer-distance commutes to Oklahoma County also can be seen from Grady County and Garfield County.

The largest number of long commutes into Tulsa County originate in Rogers County, but several also begin in the surrounding counties of Wagoner, Osage, Creek, Okmulgee, and Wagoner. Commuters also travel a farther distance from McIntosh and Muskogee counties.

Early Morning and Late-Night Commuters

While most jobs are still based on traditional 9-to-5 hours, a growing number of people work non-traditional hours. For example, many food service, manufacturing, health care, and retail jobs have start times that are much earlier, and later second-shift and third-shift jobs are increasingly common.

Several travel flows emerge showing commuters who depart early for work, between 5 a.m. and 7 a.m., which also include those who must travel long distances. These workers are departing their homes often well before transit service begins for the day. Among commuters who leave for work between 5 a.m. and 7 a.m., the heaviest travel flows are from Cleveland County and Canadian County into Oklahoma County. Significant travel flows to Oklahoma County also originate in Logan County and Pottawatomie County, as well as from Oklahoma County south to Cleveland County. Early-morning commuters to Tulsa County mostly travel from neighboring Rogers, Wagoner, and Creek counties, with relatively significant travel flows from Osage and Okmulgee counties as well.

In addition to early morning commuters, there are also many commuters who depart late for work, beginning their commute between 4 p.m. and 12 a.m. to reach second- or third-shift jobs. An observed majority of these commute trips are concentrated around Oklahoma and Tulsa counties, with employees commuting inbound from counties that share a border with Oklahoma and Tulsa counties. The largest flow pattern observed is from Cleveland County to Oklahoma County, with additional inbound commuter flows from Canadian County to the west and Logan County to the north. Another notable commuter path also exists from Oklahoma County south to Cleveland County. Major late-night commuter flows also travel to Tulsa County from surrounding Rogers, Wagoner, and Creek counties, as well as modest commuter travel from Osage County.

EXISTING CHALLENGES AND OPPORTUNITIES

The analysis of existing services in Oklahoma shows several unmet needs for transit services statewide. While 99% of all Oklahomans reside within transit service areas, actual service is not provided to all of those areas; many residents who live within a transit service coverage area may have only partial or no access to service compared to what is shown on the map. This speaks to a gap between the need for transit across the state and the limited capacity of transit agencies to meet that need given constrained resources.

Interviews with transit agencies and other stakeholders (as discussed in Chapter 2), along with a market analysis of underlying demand and need for transit in Oklahoma, highlight opportunities where transit can boost the economy and the overall quality of life for all Oklahomans. The type of transit service needed varies across the state. In Oklahoma City and Tulsa, the two largest urban areas, frequent fixed-route services are in high demand. Demand also extends to communities within the Oklahoma City metropolitan area such as Norman, Edmond, Shawnee, and Yukon, as well the urban areas of Lawton, Enid, Stillwater, and Tahlequah. These communities have areas of continuous job and population density that can support the hourly traditional fixed-route transit service. Most of Oklahoma is rural and may be served best with demand-response transit that operates door-to-door. Regional commuter services need to connect rural residents with economic opportunity.

In order to improve both urban and rural public transit, transit agencies need support locally and at a state level. In many instances, they must work together to meet existing needs and expand services in a way that targets the priorities of Oklahomans. The following sections outline the current gaps and potential improvements in transit service and highlight the opportunities created by improved connectivity statewide.

Current Gaps and Potential Improvements

Funding Needs

All transit agencies in Oklahoma have significant unmet operational and capital funding needs, preventing them from improving and expanding service for their riders. Furthermore, uncertain funding sources do not necessarily guarantee adequate funds for the future.

One major issue is the instability of local funding to match federal grants. This often causes transit agencies to miss out on receiving grants that are readily available

due to the inability to come up with adequate local match. This situation has only intensified because of COVID-19, which has significantly impacted local economies, while presenting Oklahoma's transit riders and operators with unprecedented challenges.

To meet the local match, agencies often must piece together funds from other grants and contracts, such as money received from rides contracted by LogistiCare, a Medicaid transportation provider. These contracted rides are likely to decrease in the next few years, due to LogistiCare shifting to private companies to provide rides even though private contractors in Oklahoma have struggled to meet federal requirements related to NEMT services.

For transit agencies that do receive funding from local governments, the amount of funding can depend on how much city officials support transit. A change in city councils or town financial management can drastically change how much funding the transit provider gets, which impacts the amount of local match funds available. Finding a stable mechanism for dedicated local and state funding with a clear structure can help transit agencies across the state better leverage federal dollars.

Transit agencies identified the following capital and operation gaps due to lack of funding:

- Inability to find or retain drivers due to low wages and part-time status without benefits.
- Inability to meet all rides requested due to lack of overall capacity.
- Vehicles that are too old and/or have too many miles on them.
- Vehicles that need repair and cannot fully deliver services (e.g., broken wheelchair lift).
- Difficulty of providing long distance trips, since deadhead miles (the travel required to begin or end a passenger trip) do not receive funding but still use driver time and wear down vehicles.

In addition to increasing funding at both the local and state levels to address these gaps, state and federal agencies should reduce the large volume of burdensome regulations on transit agencies and their funding that prevent them from fully offering their services and programs. As an example, some grants are restricted to only vehicle purchases, but a transit provider may need those funds more for buying parts or investing in technology. Lastly, there is potential to increase the overall pool of funding through better coordination with other agencies, such as ones that oversee economic development and health. Public-private partnerships can also get more private entities to invest in transit, such as employers looking to increase access to their facilities for potential workers.

Service Improvements and Expansion

Transit in various areas of Oklahoma is limited. Given additional funding and resources, transit agencies can expand service and make it more reliable, affordable, and convenient. This funding can be used to increase capacity by hiring and retaining more drivers, purchasing and maintaining vehicles, and other operational changes.

Currently, many transit agencies operate only on weekdays, some on Saturdays, and very few on Sundays. Service hours are generally from the early morning to late afternoon. By operating only during the day on weekdays, people who work shifts outside of the typical workday cannot use transit to get to or from their jobs. On the flip side, people who rely on transit who are searching for a job cannot seek one outside of the typical workday. In both rural and urban areas, expanding service hours and days could connect more people to economic opportunities. It can also make accessing grocery stores, schools, medical facilities, and social activities more convenient and reliable.

Some demand-response transit agencies require advanced reservations of 24 hours or more for a ride, while others operate

on-demand. Agencies noted that they sometimes turn away riders due to lack of capacity. For people to be fully able to rely on transit, services should be simple to schedule and use, and people should not have to worry about being turned away. Implementing policies to allow for on-demand trips and to guarantee all request trips can be accommodated would make transit more usable, especially for those who depend on these services.

To best serve the people who rely the most on transit and to make transit competitive with driving, services must be affordable. Long distance trips, which usually charge by the mile, can be prohibitively expensive. While some individuals may be eligible for free transportation services through Medicaid, many trips are not covered. Lowering fares can allow more people to access transit. Providers can also put in place monthly passes or other frequent rider discounts to encourage people to take more trips on transit for a smaller fare.

Improving the infrastructure adjacent to transit can also help increase the safety and comfort of transit itself. For fixed-route services, first mile/last mile considerations—such as building infrastructure for accessible sidewalks, safe biking, and well-lit bus stops—are crucial to getting more riders onto buses. Even for demand-response services, better walking conditions encourages people to make more short trips without a car or to make a reservation for demand-response service.

Education and Marketing of Transit Services

Public transit is sometimes viewed as a last resort, rather than a mode that is competitive with driving. In addition to improving transit service so that it becomes a viable first-choice mode, ODOT, OTA, and transit agencies can improve the education and marketing of public transit in order to change its image and demonstrate how transit benefits everyone.

Education and marketing efforts can focus on the following:

- Increasing awareness of the types of services available.
- Educating people on how to use transit.
- Communicating the social and economic benefits of transit.
- Providing professional development and training to support transit agency staff.

A coordinated and funded statewide public outreach effort can help spread this messaging across the whole state. Tactics in

the marketing plan can be creative too, such as creating videos geared toward attracting current non-riders onto transit. These tactics should be paired with making sure that transit information is easy to access as well.

In addition to marketing efforts to reduce public stigma and gain riders, educating key partners of public transit, such as other state agencies and elected officials, can help spread beneficial information. It can also help these partners consider incorporating transit services into their own strategies to improve public health, economic development, and quality of life in general.

Investment in Technology

Over the last decade, there have been great advances in transportation-related technology that promise to make public transit more convenient and reliable. Investing in some of this technology statewide can help transit agencies better provide service and help Oklahomans better access this service.

Technology can help improve trip batching and dispatching for transit agencies, which is currently done manually by many demand-response agencies. Trip information can be sent directly to drivers, making on-demand rides easier to provide. In order for rural agencies to be able to access this technology however, wireless internet and broadband infrastructure must also be made more robust to avoid lost connections. For potential riders, technology can help make fare payment easier and allow for the convenience of online trip requests, as well as make information about how to ride transit and service alerts more widely accessible and easy to find.

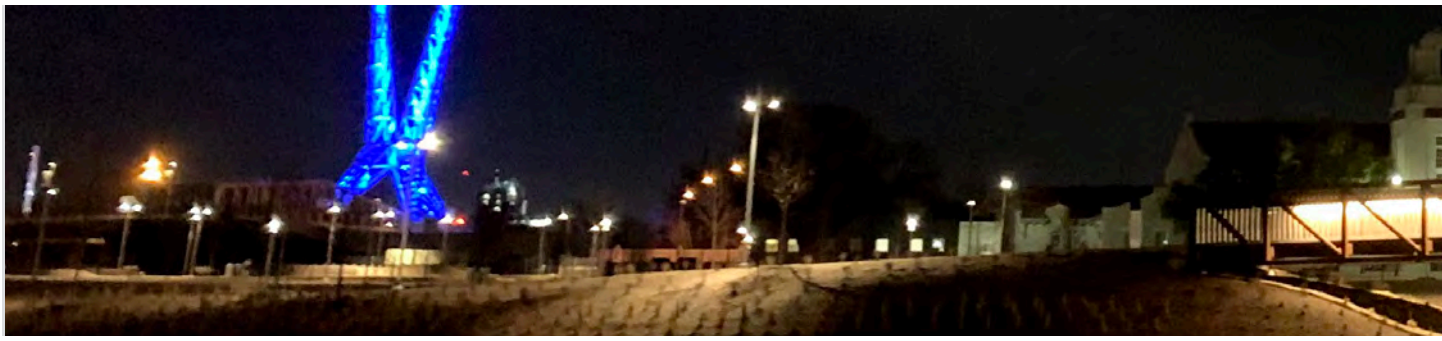
One potential goal of investing in technology is the creation of a coordinated statewide platform between all transit agencies through a user-friendly app. Through an app, riders could plan, book, and pay for any trip on any transit agency statewide, and transit agencies could receive this information and immediately provide the service.

Statewide Coordination and Connectivity

To fill gaps in transit service and ensure high-quality transportation across the state, it would be beneficial for ODOT and OTA to play a role in coordinating between transit agencies and other public and private entities. Statewide coordination can help boost the impact of other transit improvements discussed in this report.

Based on the way funding and resource allocation are structured, transit agencies often must compete for rides where service areas overlap. For people who want to travel regionally between different service areas, transit services are often lacking and transit agencies do not often coordinate with each other to pass off rides. The state can create a structure to better facilitate coordination and encourage collaboration among transit agencies to fulfill regional trips. ODOT and OTA can also work toward creating a centralized statewide mobility management system. These types of systems can provide for regional Mobility Managers and a statewide call center, as well as a single trip information and scheduling portal (one-call/ one-click) that people can access to use any transit service in the state. This portal can be made more robust with a universal fare payment system so that riders can transfer between agencies in a more convenient manner.

In addition to coordinating between agencies, the state can coordinate with private transportation entities like Amtrak and Greyhound and enter public-private partnerships to expand the reach of transit around the state. While several transit agencies offer longer-distance regional trips, none are part of the national intercity bus network and there is no statewide intercity bus information or plan that would allow users to travel from one region or city to another, or to points outside the state. There is little marketing and no branding of intercity feeders by ODOT or transit agencies. One operator, Delta Transit, is a Greyhound agent and advertises that it



provides feeder service to its Greyhound stop.

The state can play a major role in providing trainings for transit agencies. OMPT is responsible for the administration of both local and federal transit funding programs. Their responsibility to the network of transit agencies, and their funding includes training around program requirements such as drug and alcohol programs; civil rights; and maintenance and TAM Plans. Beyond compliance, agencies face many common issues, from local funding challenges and use of technology. OTA offers a forum for agencies to gather and discuss ideas. Agencies would benefit from more focused ODOT-funded opportunities to share best practices and exchange ideas. For agencies in areas far from Oklahoma City, supplementing statewide in-person training with regional in-person meetings, as well as webinars, can make them more accessible to both management staff and drivers across the state. Providing training on professional development and succession planning can also help ensure staff retention and the longevity of these transit agencies.

Opportunities Created by Improving Transit

Economic Development

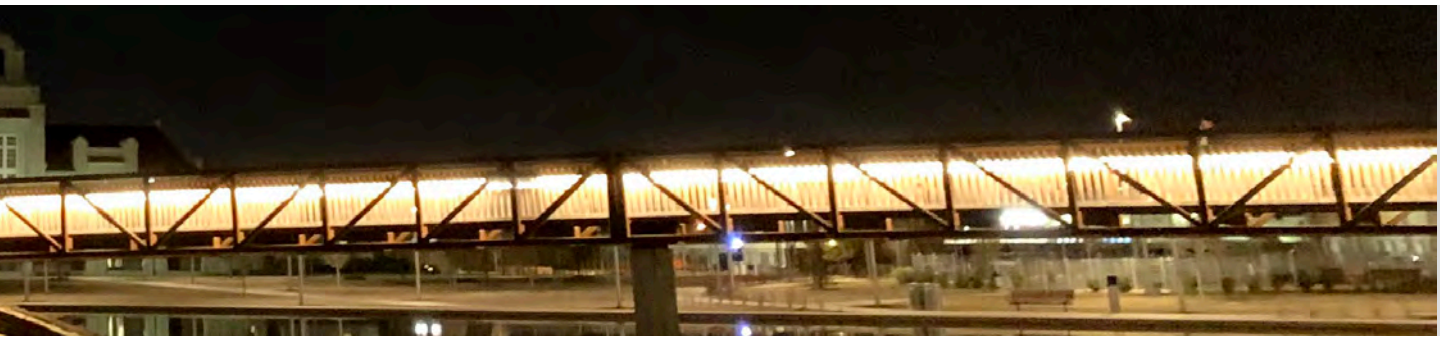
Transit agencies play a critical role in connecting people to their existing jobs as well as connecting them to new employment opportunities. This expands economic opportunity for Oklahoma's residents, and helps ensure that employers can fill positions from a large market of potential employees.

There are efforts at the state and local levels to make Oklahoma competitive with other states, which includes attracting new jobs to the state. When a major employer picks a location to open an office or facility, transportation for workers is an important consideration since employers want to ensure that they can hire workers who can get to their site. Large companies are giving increased consideration to the presence of public transit when they evaluate cities to relocate or expand, such as Amazon's requirement that transit served the site of their "HQ2" secondary headquarters. Making transit more robust presents an opportunity to make areas all over the state more attractive to prospective employers.

People must often travel farther than the town boundaries they reside in to access economic opportunities. Transit services that connect people to jobs regionally are currently lacking since many transit agencies that span the county or multiple counties are stretched thin with other trip purposes, such as medical appointments. Fare structures that charge by the mile also make these long-distance trips expensive and often cost prohibitive for riders, especially for fares that are not subsidized. Better coordination between agencies and more funding all around can help transit agencies expand their regional job access.

Quality of Life and Healthcare

The availability and quality of public transit in Oklahoma directly impacts people's quality of life and access to health services, especially for vulnerable communities. For residents without a car (or with one vehicle),low-income residents, residents



with disabilities, or older adults, access to transit is especially crucial for living independently.

Oklahoma has an aging population: between 2010 and 2017, the population 65 years of age or older increased by 13%, more than triple the growth rate of the general population (3.9%).[21] Many stakeholders have identified the ability of older adults (65+) to age in place as a high priority, so there are opportunities to expand collaborative efforts between transit agencies and health agencies for initiatives that improve livable communities. Some transit agencies currently partner with nursing homes and assisted living centers to provide group trips to other local facilities.

Many transit agencies require advanced reservations of 24 hours or more for transit rides, which is a barrier to spontaneous travel. These spontaneous trips can improve the quality of life while aging in place and can include a trip to visit friends, a last-minute medical appointment, or a trip to the grocery store or restaurant. Updating policies to allow on-demand transit trips, and potentially adding capacity to the transit system, would enhance overall wellbeing.

A major proportion of transit trips in Oklahoma, especially in rural areas, is to medical services and there is a need for reliable and affordable access to medical appointments. Though many transit agencies do connect people to local hospitals and clinics, most medical specialists are in Oklahoma City and Tulsa. Veterans' health facilities are also often farther than the typical health clinic, which introduces another gap in transit services. Increased transit services that serve longer-distance regional trips, plus better coordination between transit, health, and veteran agencies, can help better connect people to these crucial services.

Mobility for All

When communities fully invest in transit, it can meet the needs of those who rely on it most while also attracting riders who want to use a convenient and compelling transit service. Both urban and rural communities have populations who rely on transit, which can include older adults, veterans, people with disabilities, people without cars, and students. Improving transit allows these populations to access quality healthcare and specialists, employment opportunities, veteran services, supermarkets, and other centers of activity. Connecting Oklahomans to their destinations in a safe, accessible, and affordable way also allows elderly residents to age in place and sustains communities of all ages and abilities in both urban and rural areas.

At the same time, improving transit also gives Oklahomans more transportation choices, offering a compelling alternative to driving that can attract riders with other options. Providing convenient, reliable, and safe public transit that is competitive with other travel modes can reduce car dependency, increase transit ridership, and ensure that all Oklahomans can travel where they need or want to go.

21 2010 U.S. Census Summary File, 2017 American Community Survey 5-Year Estimates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