



# The Market for Transit in Oklahoma

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# Summary of Findings

As part of the development of the Oklahoma Public Transit Policy Plan, *Oklahoma Mobility*, the study team was tasked with evaluating the factors that influence transit need and demand. The goal of this study is to develop a set of strategies that improve mobility for all Oklahomans in every community. Transit is the backbone of vibrant, urban communities and a lifeline in rural ones. As we assess the market for transit, we aim to identify the places where people need access to healthcare, jobs, education, shopping, recreation and other activities. We also look to identify where transit impacts economic growth and is a viable alternative to driving.

Our analysis is based in an assumption that public transit investment is oriented around two primary goals:

1. **Strengthen 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. **Support Oklahoma's most vulnerable individuals**, including older adults, people with disabilities, minorities, and people with low incomes. Public transit services are a critical resource in ensuring access to basic services such as health care, human services, and education with or without the ability to own or operate a vehicle. 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.

## Key Findings

- **Growing Needs for Transit Investment:** 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.
- **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.
- **Job growth is half the national growth rate, and is concentrated in the urban areas:** Population and 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 and Tulsa metropolitan areas.
- **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.

- **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.
- **Both urban and rural communities have residents who rely on transit:** The Transit Reliance 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 urbanized area, 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.
- **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, instead of serving a fixed route on a fixed schedule. Technology investments can make these reservation-based systems more “on demand” making these services more convenient and accessible. Connections between all types of transit services are important for providing access to both local and regional destinations.

# 1 Introduction

## What is Oklahoma Mobility?

In 2019, in accordance with HB 1365, the Oklahoma Department of Transportation (ODOT) created the Office of Mobility and Public Transit to help improve delivery and coordination of public transit services, ensuring that resources are aligned to meet mobility needs across Oklahoma. To aid in this effort, the Oklahoma Public Transit Policy Plan, titled *Oklahoma Mobility*, as mandated by HB 1365, is a joint effort by ODOT and the Oklahoma Transit Association (OTA) and aims to:

- Establish standards and protocols for agencies involved in the delivery and funding of public transit services.
- Set the foundation for policies guiding transit investments statewide as well as establishing programs and strategies to enhance transit services.
- Aid the development of a policy that addresses current and future transit challenges while providing a strong and enduring vision for Oklahoma.

## Assessing the Transit Market

The project team has been tasked with analyzing Oklahoma's need for transit services through developing a detailed market analysis. This document builds and expands upon the previous work of 2018's Oklahoma Transit Needs Assessment by the Small Urban and Rural Transit Center at the Upper Great Plains Transportation Institute at North Dakota State University. The Market Analysis applies a methodology focused on assessing change in demand from the past to the present and into the future. This document provides the approach, analysis, and findings of the market analysis, which will then be used to evaluate the appropriateness of planned services and identify new and emerging opportunities for transit investment.

To understand the market (or need) for transit in Oklahoma today, the study 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 absolutely: there are always exceptions to every rule and sometimes transit services succeed where you 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 related 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 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.



### Major Activity and Resource Centers:

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 want to go. Travel flows show the trips that people make and indicate where transit can or should provide service.

Ultimately, transportation connects people to jobs, activities, and basic services like medical appointments and shopping. Every community has people who cannot reach jobs and basic services on their own. In many instances, these individuals use transportation services provided by other federally funded and state-funded human service programs, like Medicaid. These services are typically mandated by the federal government and are available statewide, but they are limited to trips to and from specific appointments and activities. Public transit, on the other hand, includes transportation services available to all members of the public traveling for any purpose.

## About the Data

To conduct the market analysis, the study team used the most recent data available at the time of analysis. Population and demographic information used in the market analysis is based on the US 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 US Census Center for Economic Studies, from 2010 and 2017. Additional data sources were used for specific topics in the document as well, and analysis was based on the most recent data available from those sources.

## Oklahoma Today

Oklahoma is home to nearly 3.9 million people. About 2.4 million people, or 62% of the state’s population, live in the state’s designated Metropolitan Statistical Areas (MSA), also referred to in this document as urbanized areas, while 1.5 million (38%) reside in smaller urbanized communities and rural areas across the state. From 2010 to 2017, the state added about 145,000 residents, an increase of 3.9% (Figure 1). This matches national growth rate during the same period, when the US population increased by 4.0%. However, population changes varied across the state, with notable differences in urban and rural parts of the state. The majority of population growth occurred in the state’s larger and smaller urbanized areas, which grew by 6.0%, in contrast to 0.6% population growth in rural areas. The greater Oklahoma City metro area, home to 35% of Oklahoma’s residents, grew at twice the statewide rate (8%), while most other metro areas generally increased at around the state average.

Looking ahead, it is anticipated that Oklahoma’s population will increase more than 20% by 2045, with most population growth concentrated in the metropolitan areas of Oklahoma City and Tulsa. This growth rate is slightly lower than the projected growth rate for the US, and less than half of the projected growth rate for Southwest states overall (Oklahoma, Texas, Arizona, and New Mexico).<sup>1</sup>

Figure 1: Population Growth, 2010 to 2017

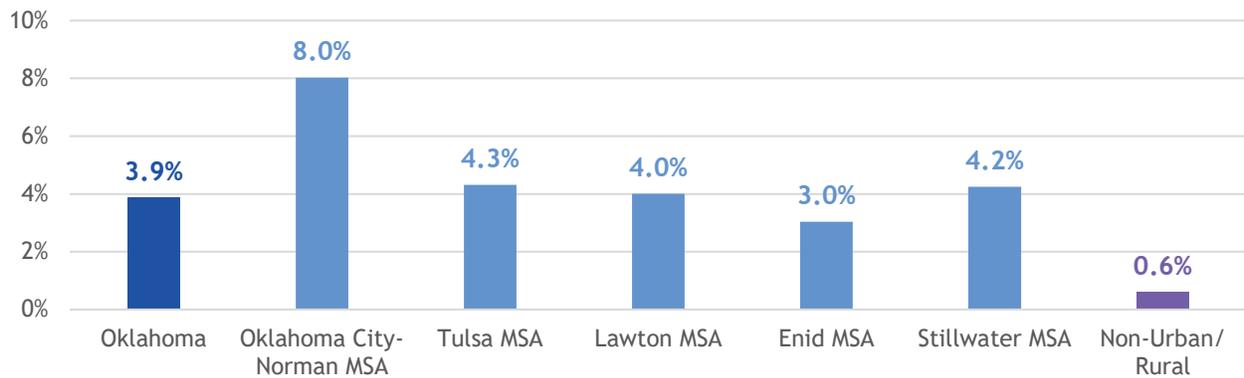
	State of Oklahoma	Oklahoma City-Norman MSA	Tulsa MSA	Lawton MSA	Enid MSA	Stillwater MSA	Non-Urban/Rural
2010	3,751,351	1,252,987	937,478	124,098	60,580	77,350	1,487,493
2017	3,896,251	1,353,504	977,869	129,066	62,421	80,634	1,496,356
# Change	+144,900	+100,517	+40,391	+4,968	+1,841	+3,284	+8,863
% Change	3.9%	8.0%	4.3%	4.0%	3.0%	4.2%	0.6%

Source: 2010 US Census Summary File, 2017 American Community Survey 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.

<sup>1</sup> 2020-2045 Oklahoma Long-Range Transportation Plan, Existing and Future Trends Report, page 2-2. Data sources: US Census Bureau and Woods & Poole Economics.

**Figure 2: Population Growth, 2010 to 2017**



Oklahoma added 90,000 jobs between 2010 and 2017, representing a 6.2% increase in jobs statewide. While this is a greater increase than population growth, it was just under half of the national job growth rate (14.1%). This growth was also not uniform across Oklahoma: while jobs increased by 9.3% in urban areas, it increased by just 0.3% in the state’s rural areas. Jobs increased in the greater Oklahoma City and Tulsa metro areas by 8.8% and 8.1%, respectively. Combined, these two metro areas are home to two-thirds of the state’s jobs. The Stillwater region experienced a 12.7% increase, or about twice the state average. In contrast, the growth rates in Lawton and Enid were well below the state’s overall rate.

Statewide and in most metro areas, job growth has been higher than population growth. The difference is particularly stark in the Tulsa region, where job growth of 8.1% was nearly twice its population growth of 4.3%, and in the Stillwater area, where the 12.7% increase in jobs was nearly three times the population increase of 4.2%. In contrast, Oklahoma’s rural areas experienced a 0.3% increase in jobs overall, just half of its population growth of 0.6%. The Enid metro area also had a lower job growth rate (1.8%) as compared to population growth (3.0%).

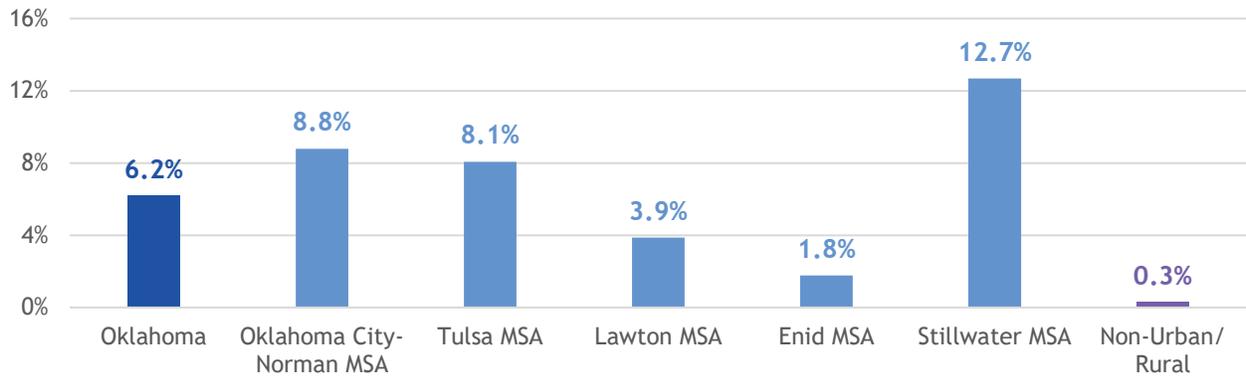
**Figure 3: Employment Growth in Major Metro Areas, 2010 to 2017**

	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 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: Employment Growth, 2010 to 2017



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# 2 Transit Needs Across Oklahoma

Demographic and socioeconomic characteristics, or an analysis of transit reliance, also help explain 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, they are more likely to use or rely on transit relative to the general population.

## Socioeconomic Characteristics

Socioeconomic characteristics that are related to transit propensity include:

<b>Vehicle Ownership and Access</b>	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 access to 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.
<b>Income</b>	Residents with incomes lower than average tend to use transit options at a higher rate than individuals in higher income brackets because it is less expensive than owning and operating a personal vehicle, and many rely on transit as their primary mode of transportation.
<b>Age</b>	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 a lower interest in driving.
<b>Disability</b>	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.
<b>Race and Ethnicity</b>	Minority residents generally have higher rates of transit use and providing effective transit service to minority populations is also particularly important to the Federal Transit Administration and is a requirement under Title VI of the Civil Rights Act of 1964.

The distribution of each of these characteristics is mapped on the following pages. In many (but not all) cases, the distribution tended to mirror that of the general population. To gain additional insight into where the relative need of these different populations is highest beyond only population numbers, the study team identified areas that have both high shares of each population group (i.e., places where each group makes up a larger percentage of the total population) and where the total population is larger (where there are more people that may need service).

## **Zero-Vehicle and One-Vehicle Households**

Approximately 563,284 households in Oklahoma (14%) have no personal vehicle available or just one personal vehicle.<sup>2</sup> While many of these households are focused in the state's core urban areas where transportation options may be more viable, there are also many households in other parts of the state where transportation poses a greater challenge. In these areas, a household with multiple residents may struggle with getting everyone to jobs, healthcare, or other services with just one vehicle, and any vehicle repairs and the associated costs present a significant risk for these households (Figure 5). The places with the highest potential transit need by zero- and one-vehicle households include:

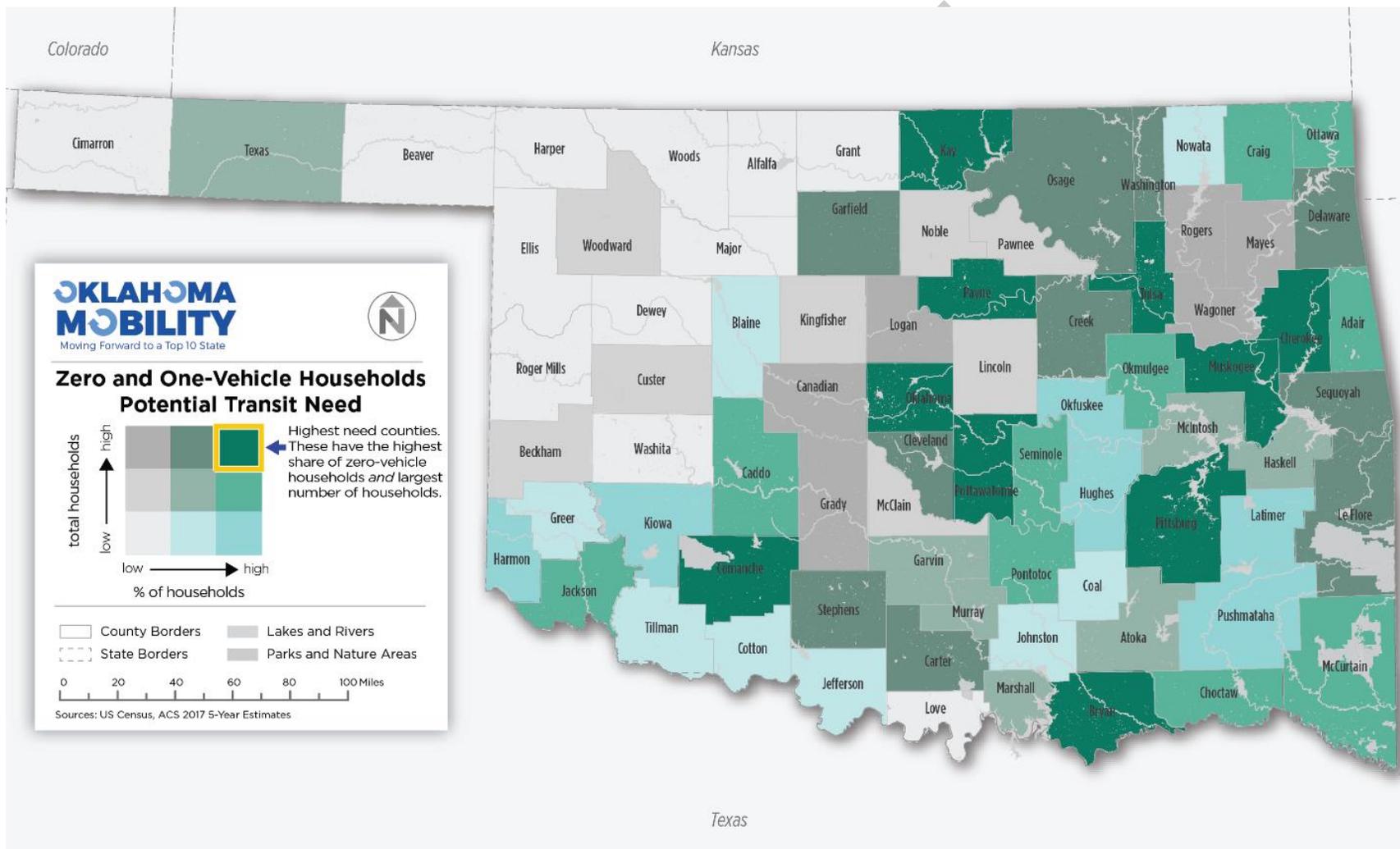
- Oklahoma County and neighboring Pottawatomie and Cleveland Counties
- Tulsa County, and neighboring Washington, Osage, Creek, and Okmulgee Counties
- Muskogee County
- Northeastern counties including Cherokee, Delaware, Sequoyah, Adair, Ottawa, Craig, and Nowata Counties.
- Kay County
- Garfield County
- Payne County
- Comanche County and neighboring Stephens County to the east and Caddo County to the north. Other counties in southwestern Oklahoma have low population but relatively high shares of auto-less households, including Jackson, Kiowa, Harmon, Tillman, Cotton, Jefferson, and Greer Counties.
- Pittsburg County
- Le Flore County
- Bryan, Choctaw, and McCurtain Counties in the southeast. Neighboring counties with low population but relatively high shares of auto-less households include Pushmataha, Latimer, and Atoka Counties.
- Texas County
- When considering just workers in the population, some counties in northwest Oklahoma have a high share of workers without access to a vehicle, specifically Harper, Woods, and Woodward Counties.

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<sup>2</sup> 2017 American Community Survey 5-Year Estimates



Figure 6: Highest Potential Need Among Zero- and One-Vehicle Households



## Low-Income Residents

There are just over one million residents who are low-income (at or below 150% of the poverty level), or about 26% of Oklahoma residents. This is slightly above the national share of low-income residents of 23%. Counties with high potential transit need among low-income residents are generally focused along the eastern edge, southeast, and central parts of the state, as well parts of the southwest.

- Highest-need eastern counties include Cherokee, Delaware, Muskogee, Sequoyah, and Le Flore Counties. There is also high need in Craig, Ottawa, Mayes, Adair, and Haskell Counties.
- Southeast counties especially Bryan, Atoka, McCurtain, Choctaw, and Marshall. Counties with low population but relatively high shares of low-income residents include Pushmataha, Latimer, and Johnston Counties.
- Payne County
- Kay County
- Garfield County
- Central- and central-east counties including Oklahoma, Pottawatomie, Pittsburg, Seminole, Hughes, Okmulgee, and Okfuskee Counties.
- Texas and Cimarron Counties in the western panhandle
- Southwest counties including Comanche, Stephens, and Carter. Adjacent counties with low population but relatively high shares of low-income residents include Kiowa, Greer, Tillman, and Jefferson Counties.

Figure 7: Distribution of Low-Income Residents

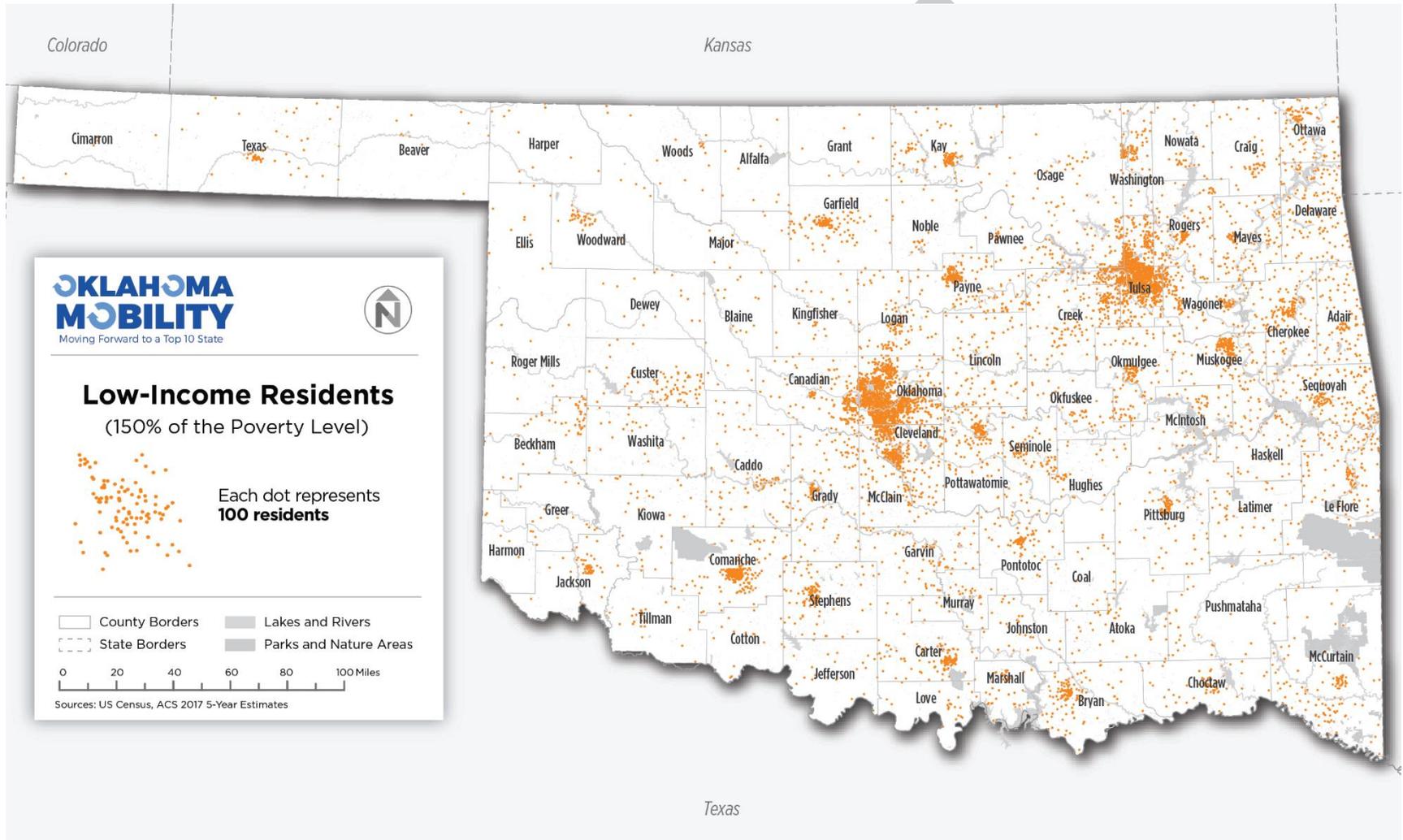
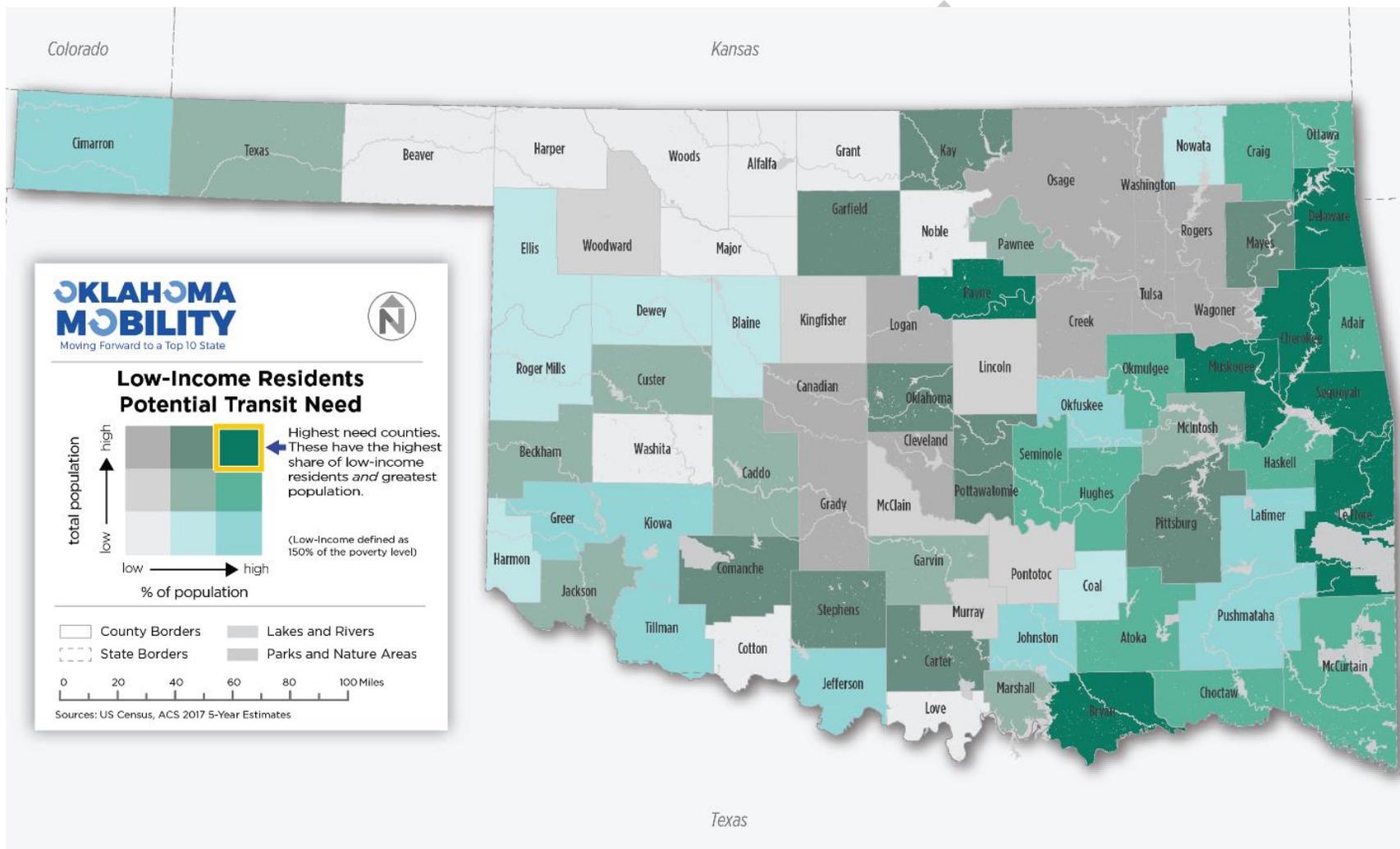


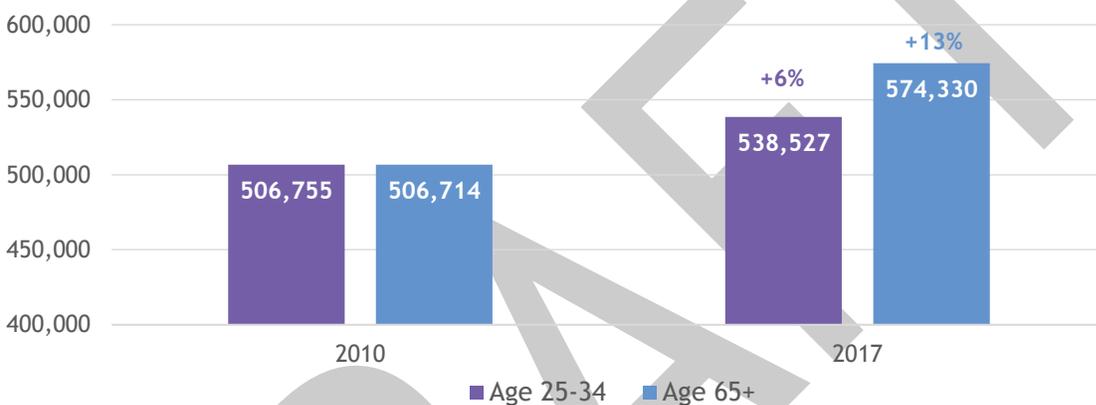
Figure 8: Highest Potential Need Among Low-Income Residents



## 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. For this population, public transit is a critical component that allows aging adults to “age in place,” or continue to live in their community as they age. As life expectancy continues to increase, the population of very elderly adults - aged 85 and over - is expected to grow as well, posing additional transportation challenges. In contrast, younger adults, and Millennials in particular (age 25-34), generally have a higher interest in using transportation options such as transit and a lower interest in driving. Both of these age groups are growing in Oklahoma; however, the population of adults age 65 and over has grown at twice the rate of adults age 25 to 34 (Figure 9), and their relative share of the total population has grown during this time.

Figure 9: Population Growth Among Age Groups, 2010 to 2017



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

## Older Adults

Areas that stand out with the highest relative need among all older adults (age 65 and older) include:

- Northeast corner of the state, especially Delaware County, as well as Mayes and Craig Counties
- Washington County
- Osage and Kay Counties
- Pittsburg County, along with some relatively high need in neighboring Hughes and McIntosh Counties
- Eastern Oklahoma in Sequoyah, Le Flore, and Haskell Counties
- Southern Oklahoma in Bryan, Choctaw, and Marshall Counties
- Creek County

In contrast, several counties have very low total population, but a large percentage of that population is age 65 or older. This is reflective of a relatively high share of the older adult population residing in rural areas (45%) as compared to the state's population overall (38%). These counties, which are primarily, but not all, in the western half of the state, have lower population densities but a relatively large share of their population comprised of older adults, and face a unique transportation challenge to serving this population. These counties include:

- Northwest and West Counties: Cimarron, Ellis, Roger Mills, Dewey, Major, Alfalfa, Grant
- South and Southwest Counties: Kiowa, Tillman, Cotton, Jefferson, Love
- Southeast: Latimer and Pushmataha Counties
- Coal County
- Nowata County

When considering only very elderly adults (age 85 and older), these trends are even more stark. The counties with the highest need among this population are Pittsburg, Washington, Garfield, and Stephens Counties. High need also exists in:

- Northeast: Delaware, Mayes, and Craig Counties
- Tulsa County
- Kay County
- Muskogee County
- Hughes and McIntosh Counties north of Pittsburg County
- Bryan County

More counties also emerge that have a high share of elderly residents, focused mostly in western Oklahoma and in some southeastern counties.

Figure 10: Distribution of Residents Age 65 and Older

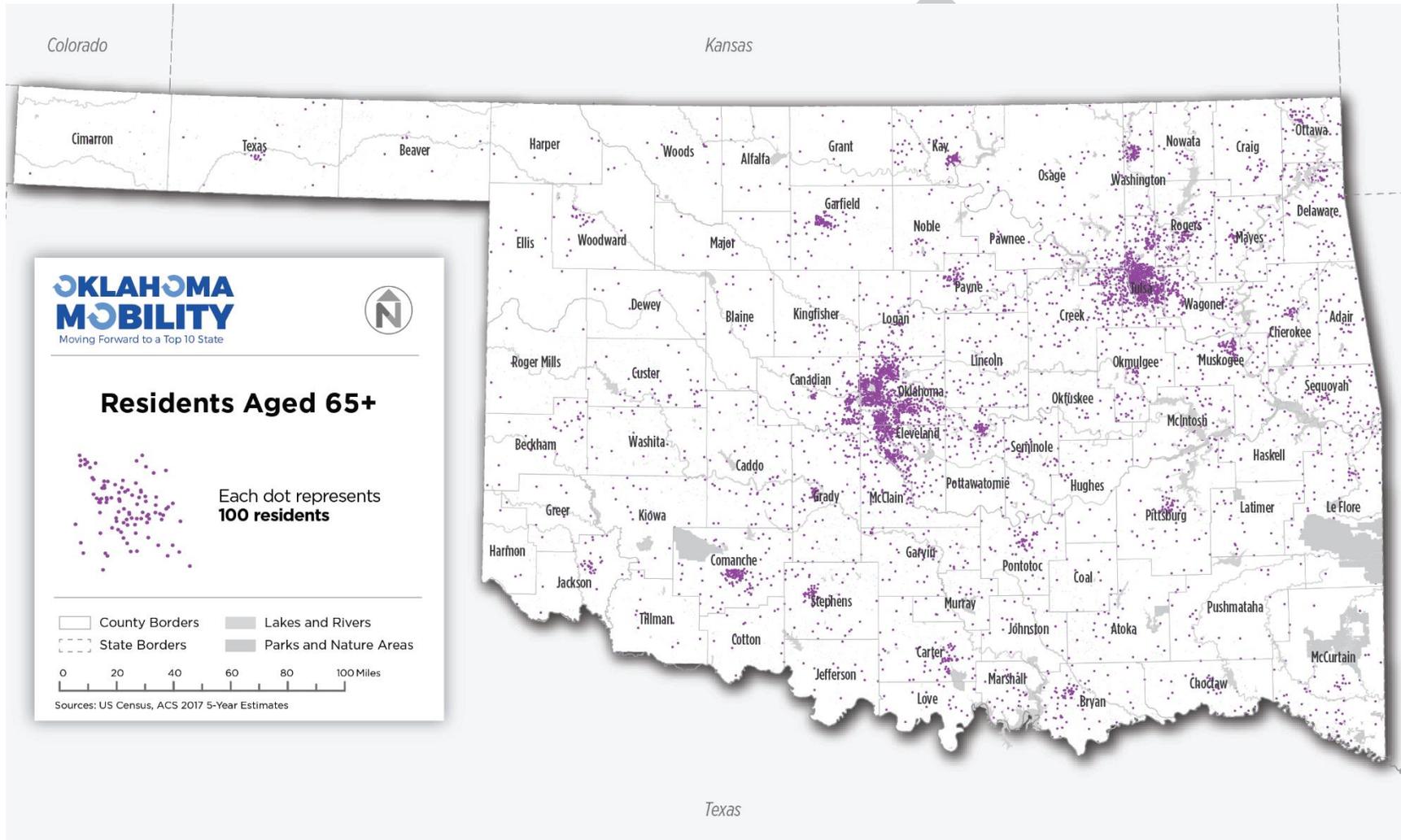


Figure 11: Highest Potential Transit Need Among Residents Age 65 and Older

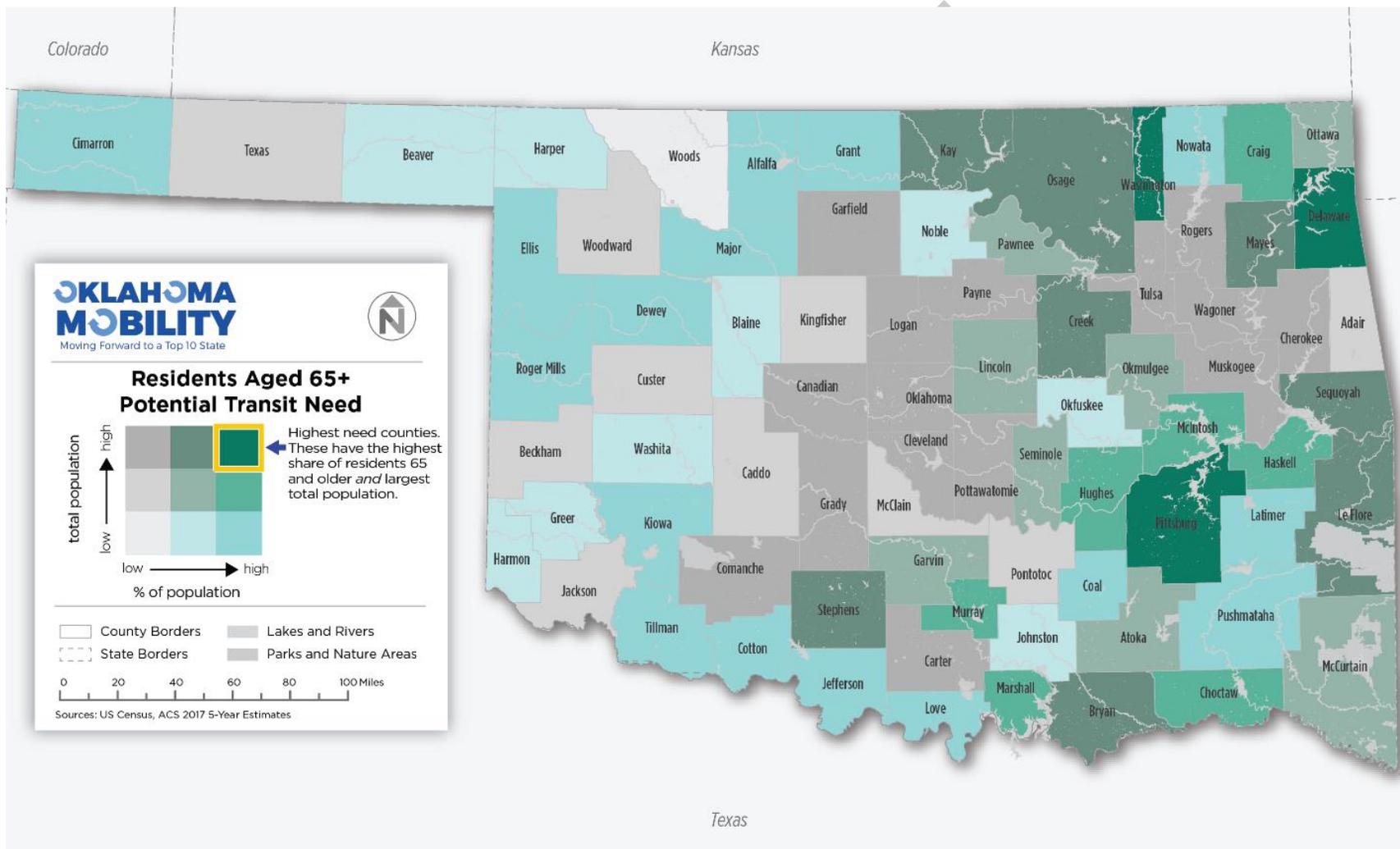
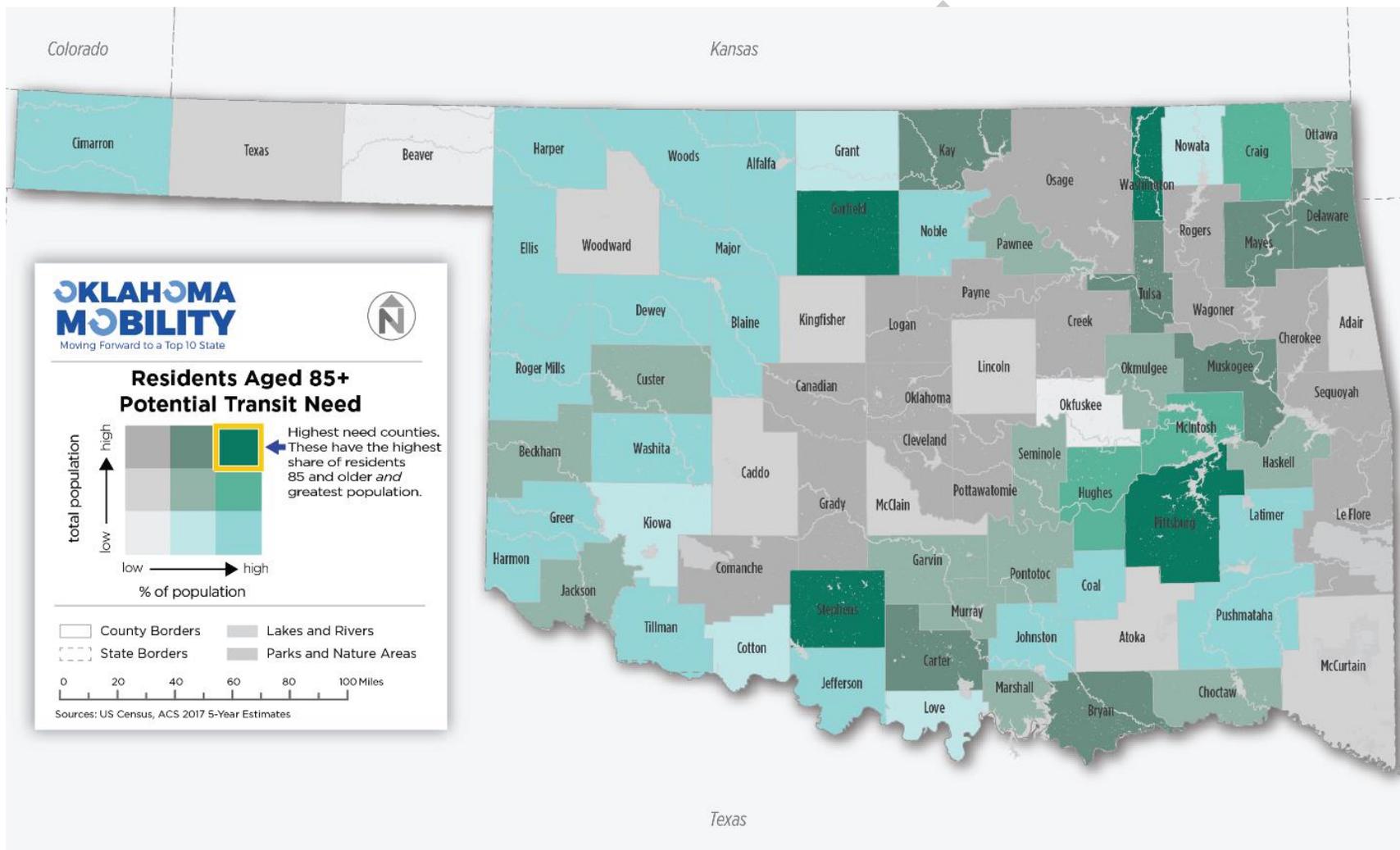




Figure 13: Highest Potential Transit Need Among Residents Age 85 and Older



### **Millennials (Age 25-34)**

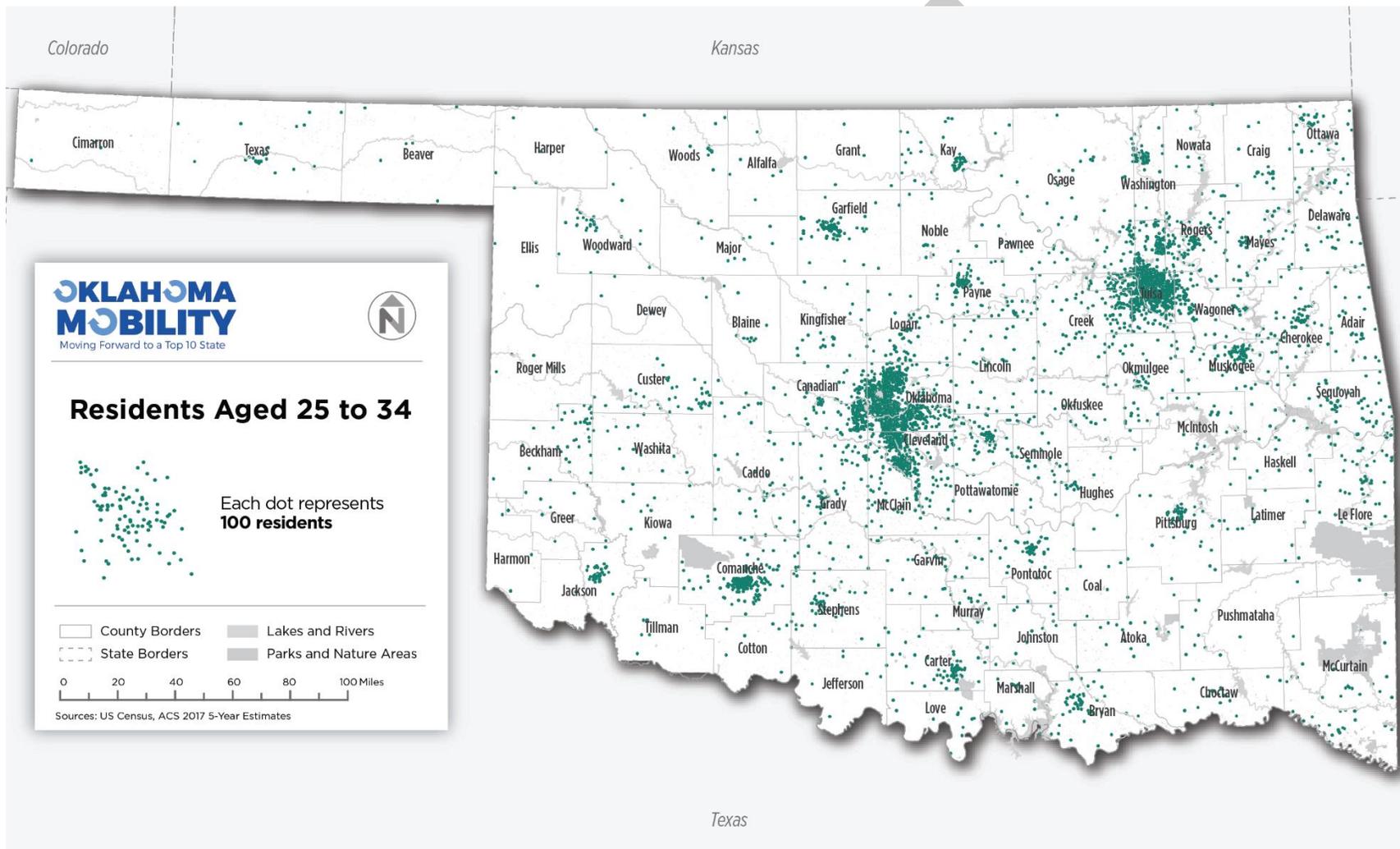
Younger adults generally have a higher interest in using transportation options such as transit and a lower interest in driving. Residents between the ages of 25 and 34 are generally focused in and around the state's large cities and metropolitan areas. Unlike with older age groups, there are fewer counties that have both low density and high shares of Millennial residents. Counties with the relative highest potential need among residents between ages 25 and 34 include:

- Oklahoma County and neighboring Cleveland, Canadian, and Pottawatomie Counties
- Tulsa County and neighboring Washington, Wagoner, and Muskogee Counties
- Comanche County
- Pittsburg County
- Bryan County
- Payne County
- Garfield County

Other areas with a high or moderate potential need by 25-34 residents include:

- Eastern Oklahoma: Rogers, Mayes, Cherokee, Sequoyah, and Le Flore Counties
- Key County
- Creek County
- Several counties across central Oklahoma: Logan, Kingfisher, Caddo, Grady, Stephens, and Carter Counties
- Pontotoc, Hughes, and Atoka Counties
- Western Oklahoma: Texas, Woodward, Custer, Beckham, and Jackson Counties.

Figure 14: Distribution of Residents Age 25 to 34





## Residents with Disabilities

Approximately 606,000 Oklahoma residents identify as having a least one disability<sup>3</sup>, or nearly 16% of the state's population. This is higher than the national rate, where people with disabilities comprise 12% of the total population.<sup>4</sup> Areas with high potential transit need among residents with disabilities are highly focused in eastern Oklahoma, with some additional areas of need in northern and southwestern counties. Potential transit need is highest in Delaware and Mayes Counties, Pittsburg County, Sequoyah and Le Flore Counties, and Bryan County.

Other areas with a high or moderate potential need by residents with disabilities include:

- Kay, Osage, and Washington Counties
- Eastern counties including Wagoner, Cherokee, and Muskogee Counties, as well as McIntosh and Haskell Counties
- Pottawatomie County, as well as Seminole and Hughes Counties
- Comanche, Stephens, Grady, and Caddo Counties
- Southeastern counties including McCurtain, Choctaw, and Atoka Counties

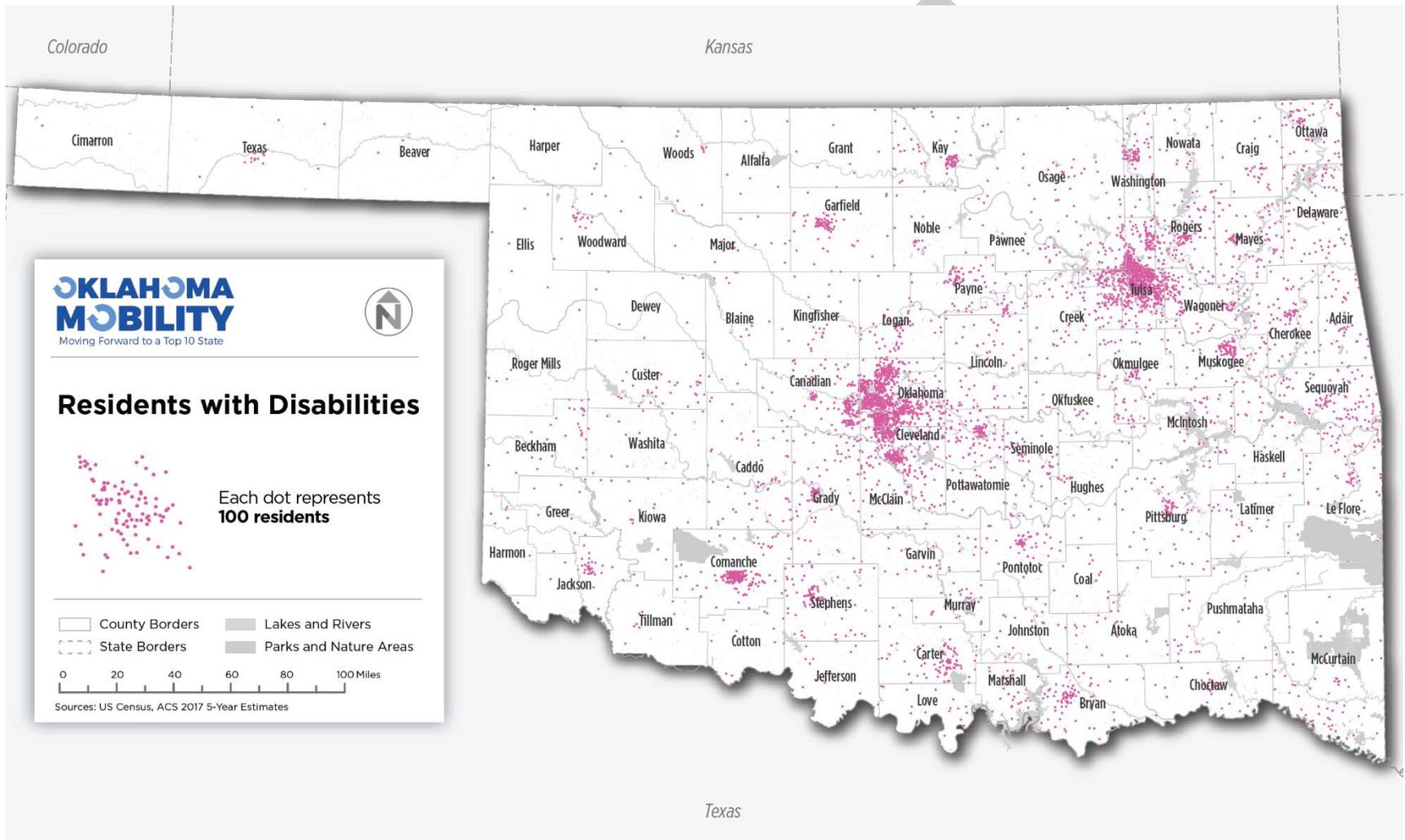
Counties with low total population but high shares of residents who have a disability are generally focused in southern areas of the state. These include Latimer, Pushmataha, Coal, Johnston, Jefferson, Cotton, Kiowa, Harmon, and Blaine Counties.

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<sup>3</sup> Definitions of disability considered by the US Census American Community Survey (ACS) can be found here: [https://www2.census.gov/programs-surveys/acs/tech\\_docs/subject\\_definitions/2018\\_ACSSubjectDefinitions.pdf](https://www2.census.gov/programs-surveys/acs/tech_docs/subject_definitions/2018_ACSSubjectDefinitions.pdf).

<sup>4</sup> 2017 American Community Survey 5-Year Estimates

Figure 16: Distribution of Residents with Disabilities





## Minority Residents

For this analysis, minority residents are defined as all residents that do not identify as White Non-Hispanic. Counties with the highest proportion of minority residents, including high- and low-population counties, are concentrated in the eastern half of the state.<sup>5</sup> Areas that stand out with the highest potential need among minority residents include:

- Northeastern Oklahoma, especially Delaware, Mayes, and Cherokee Counties
- Muskogee and Sequoyah Counties
- Osage County
- Oklahoma County
- Comanche County

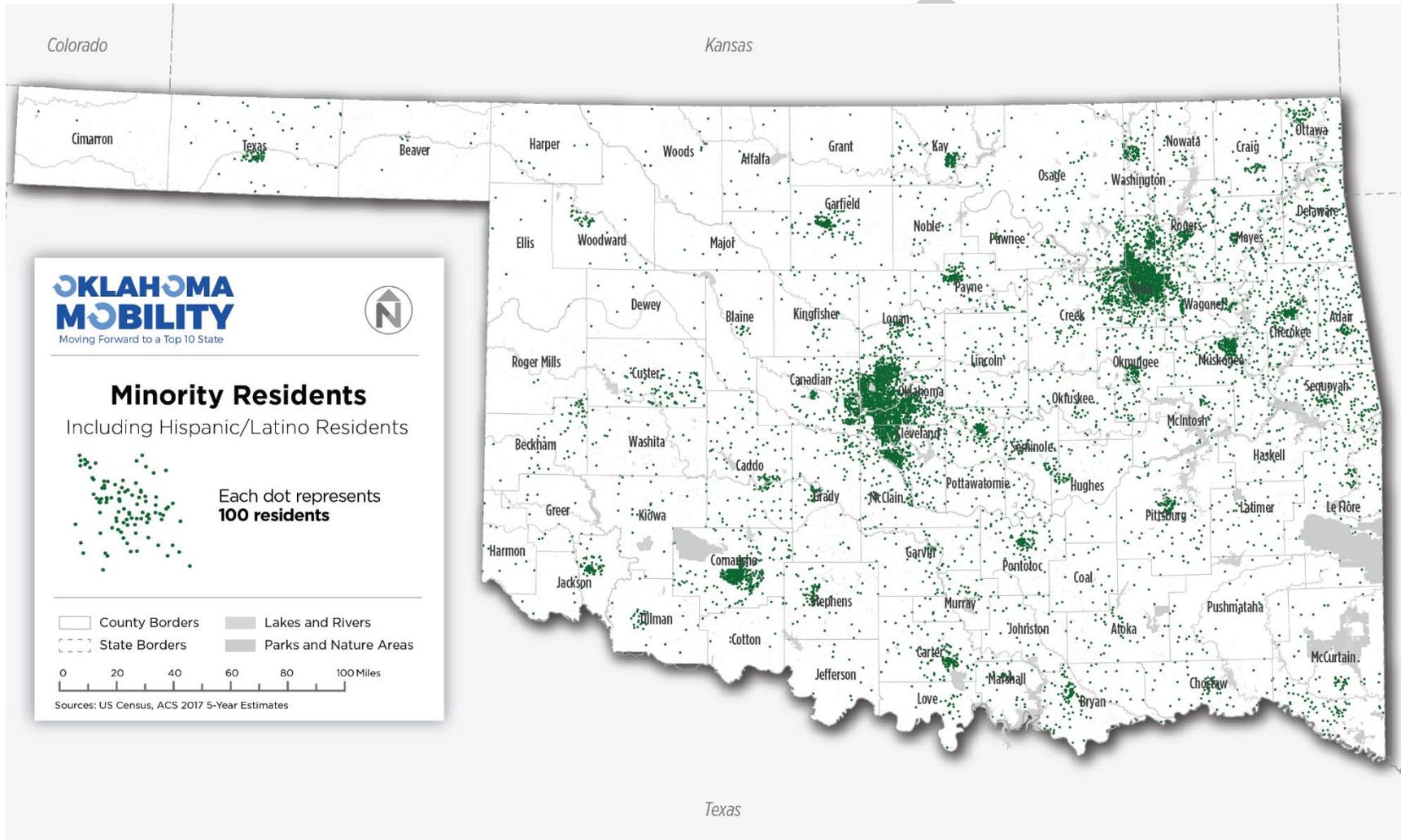
Additional areas with potential need include:

- Tulsa, Rogers, Washington, Creek, and Wagoner Counties, as well as Okmulgee County
- Cleveland and Pottawatomie Counties
- Kay County
- Pittsburg County
- Bryan County, as well as Choctaw and McCurtain Counties
- Carter County
- Le Flore County
- Seminole, Hughes, and Pontotoc Counties
- Ottawa, Craig, and Adair Counties
- Caddo and Jackson Counties

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<sup>5</sup> 2017 American Community Survey 5-Year Estimates

Figure 18: Distribution of Minority Residents





## Transit Propensity Index

Most of the demographic and socioeconomic characteristics described above are generally associated with a greater tendency, or propensity, to use public transit. The following five characteristics were combined into the Transit Propensity Index:

- Households with low-income levels, 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 is a single measure that estimates the scale in which a specific area (such as a census tract) may have a sizeable proportion of the population with characteristics related to transit usage, listed above. 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.

Areas that stand out in terms of transit propensity 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

Figure 20: Transit Propensity Index

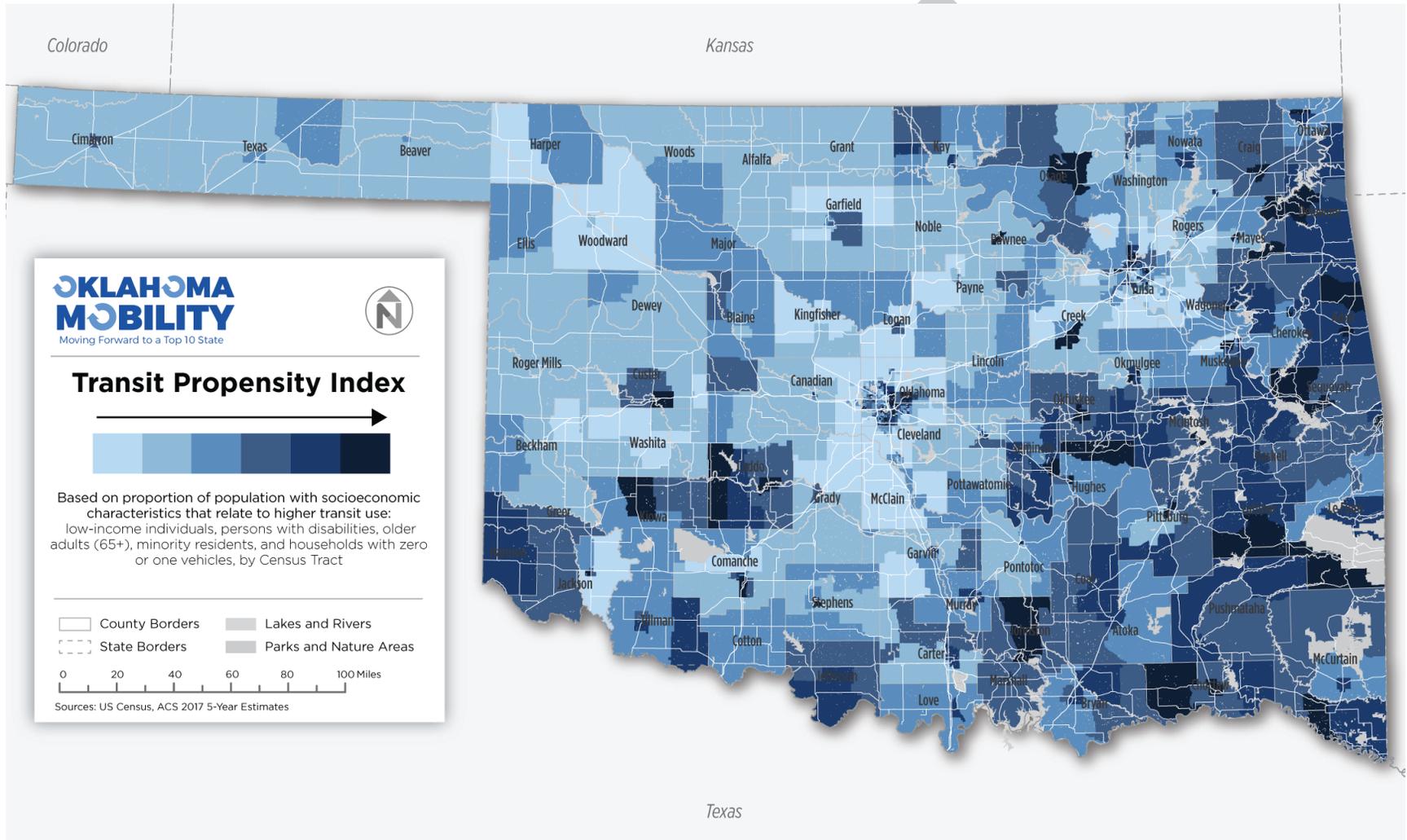


Figure 21: Transit Propensity Index - Central Oklahoma

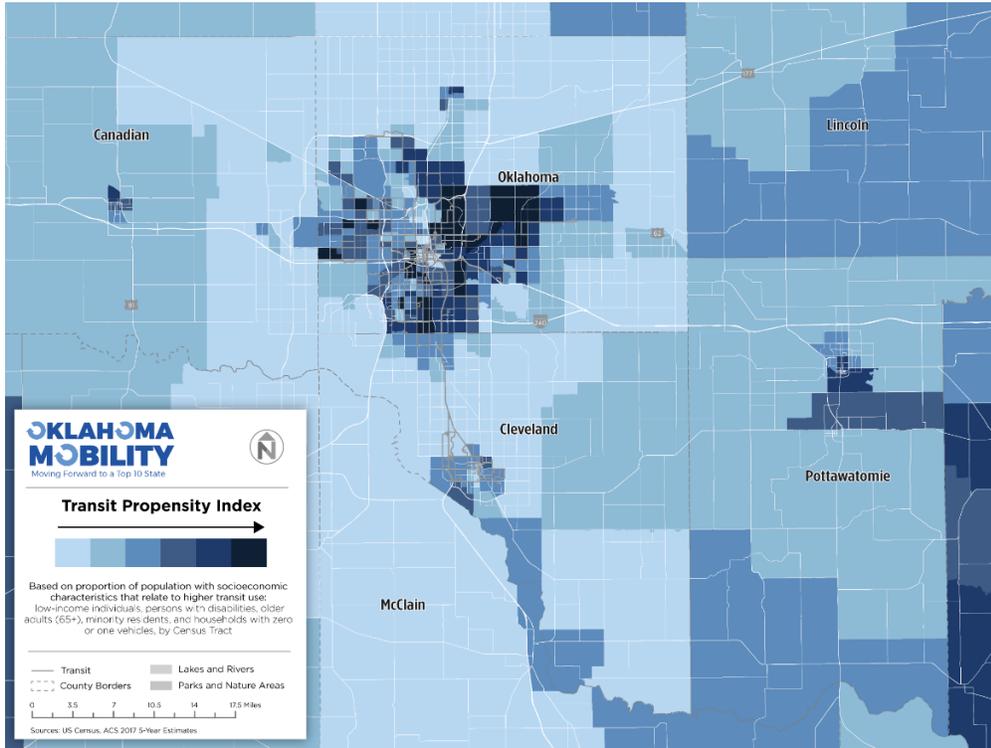


Figure 22: Transit Propensity Index - Tulsa Metropolitan Area

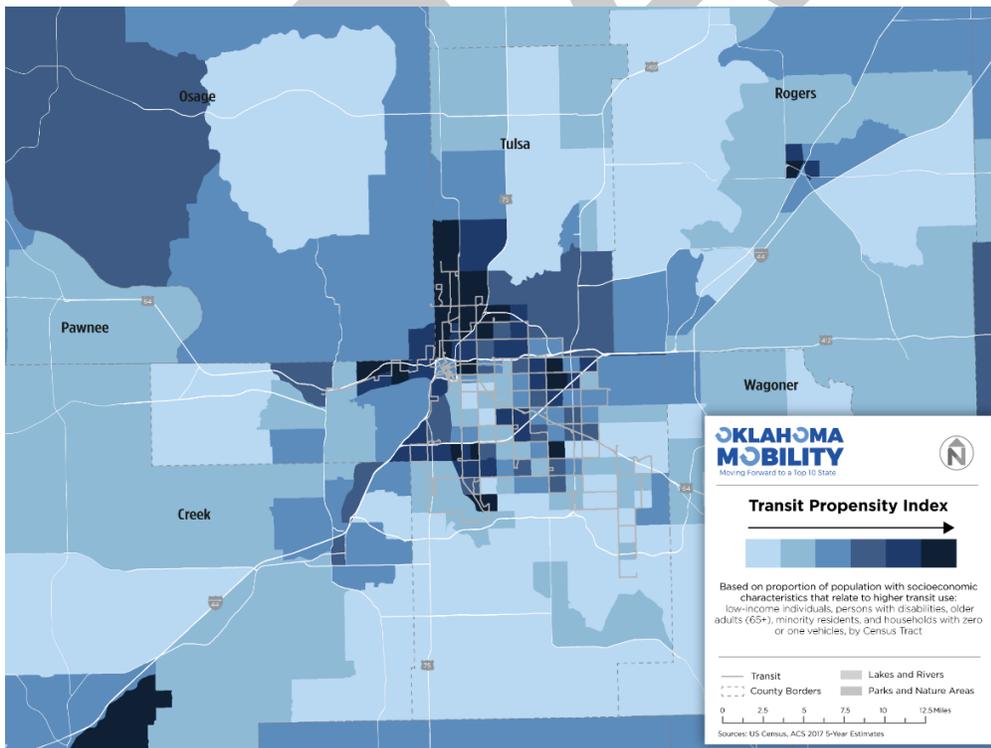
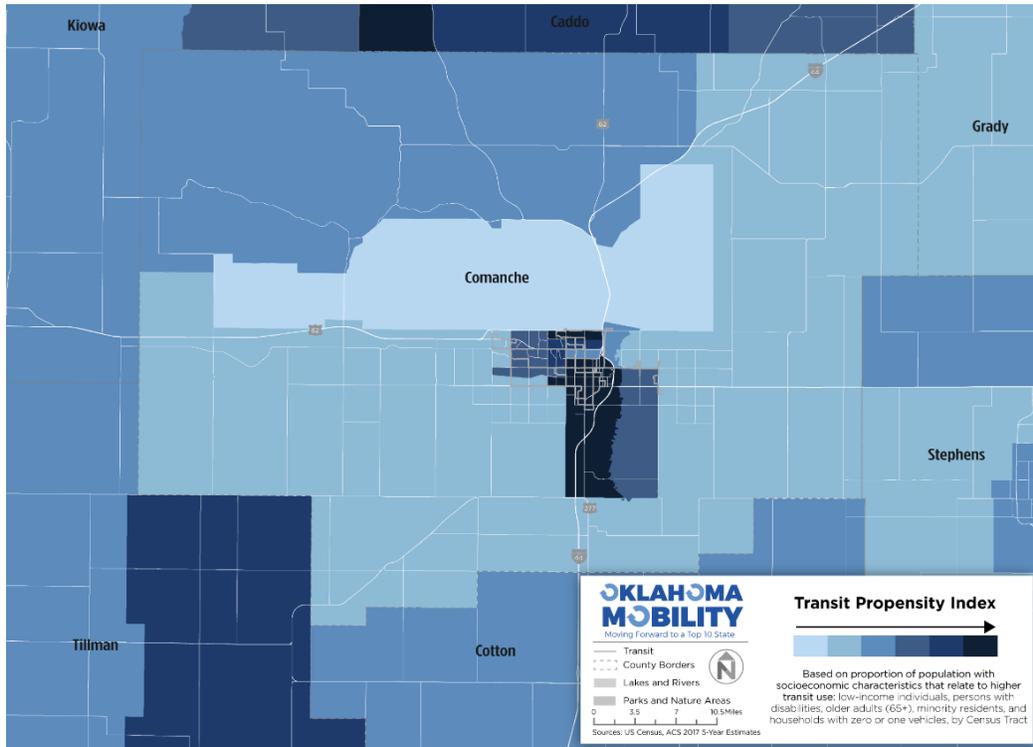
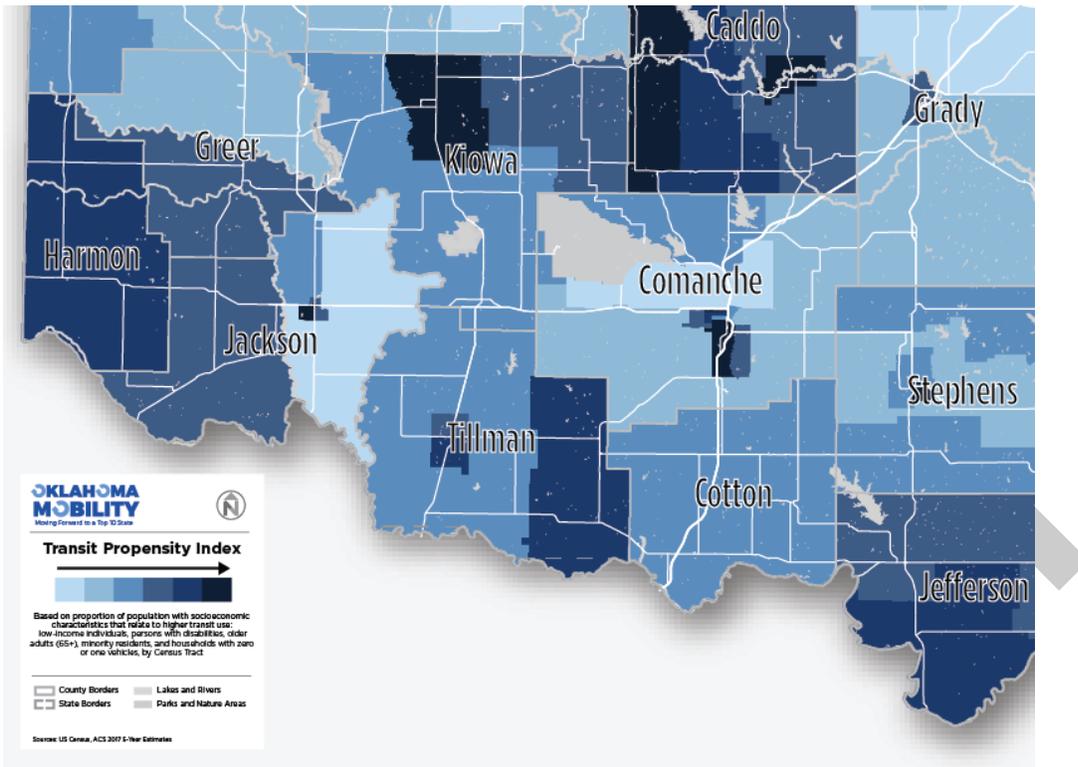


Figure 23: Transit Propensity Index - Lawton Metropolitan Planning Organization (Lawton MPO) / Comanche County



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Figure 24: Transit Propensity Index -Southwest Oklahoma (SORTPO, ASCOG Planning Areas)



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Figure 25: Transit Propensity Index - Northeast Oklahoma (NEORTPO Planning Area)

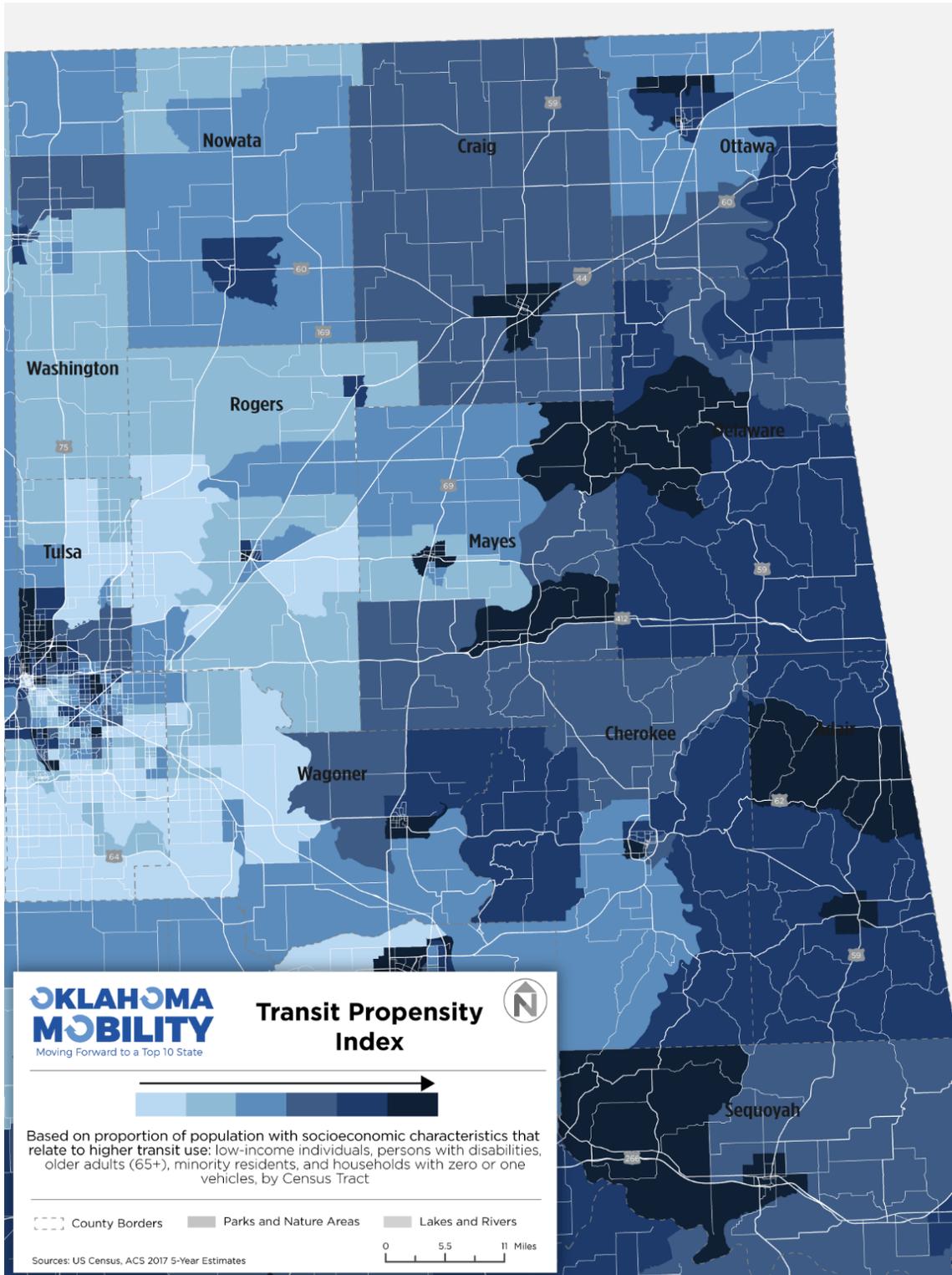


Figure 26: Transit Propensity Index -Southeast

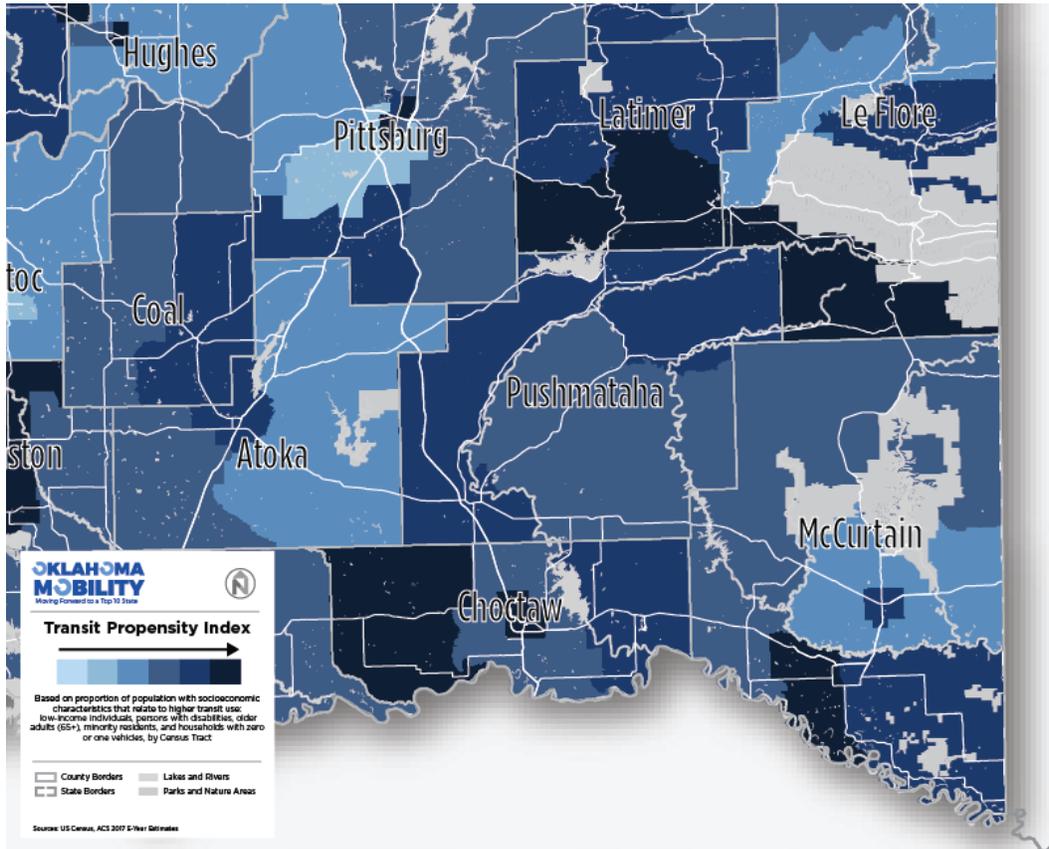
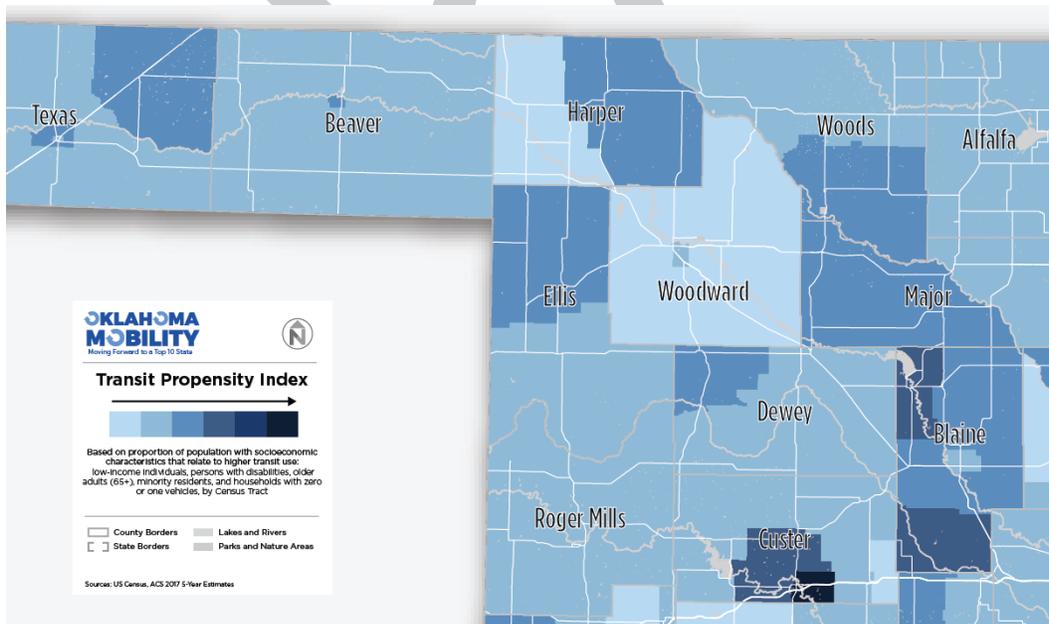


Figure 27: Transit Propensity Index -Northwest (NORTPO Planning Area)



# 3 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, and each one has different strengths and weakness and is designed to serve different types of communities and riders. Transit propensity, as described in the previous chapter, 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.<sup>6</sup> About 63% 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, and northwest Cleveland County, and stretching 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 County, Rogers County, and Creek County.

Additional municipalities with notably high concentrations of people include:

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

There are concentrations of population in other communities and small towns, while many of Oklahoma’s residents are also more spread out in rural areas. To meet the needs of these different contexts, transit service would generally be more oriented toward demand-response or regional

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<sup>6</sup> 2017 American Community Survey 5-Year Estimates

services that connect residents to opportunities and services, in contrast to more fixed-route service focused in small and larger urban areas.

Since 2010, Oklahoma's population increased 3.9%, which mirror's the nation's overall growth rate during the same period.<sup>7</sup> However, the most significant changes in population were focused in a few key areas, specifically within Oklahoma City and Tulsa and their surrounding urban areas. During this period, population in the state's urban areas increased 6.0%; in contrast, population in the rest of the state increased just 0.6%. 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%. 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.

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<sup>7</sup> 2010 US Census Summary File, 2017 American Community Survey 5-Year Estimates

Figure 28: Population Distribution

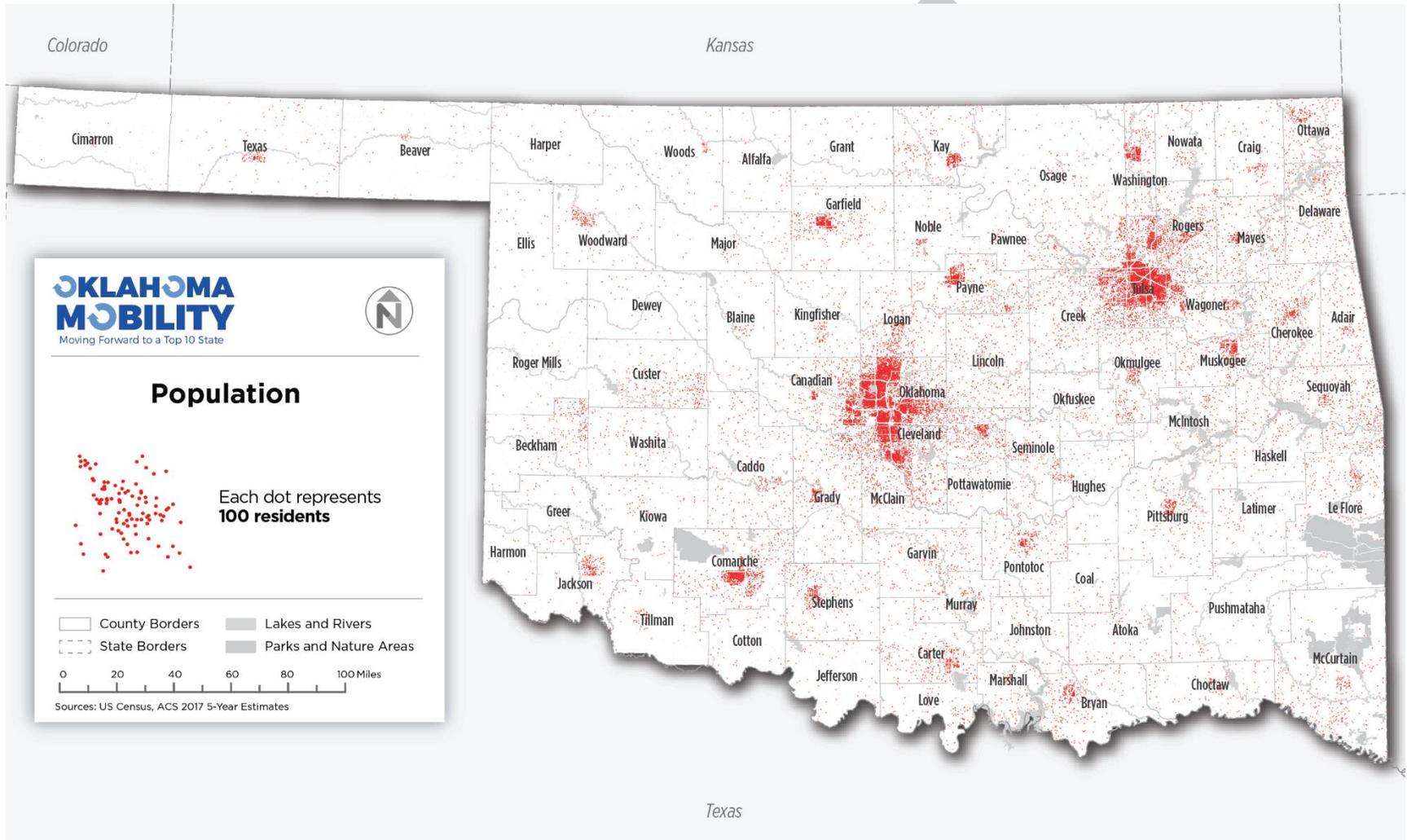
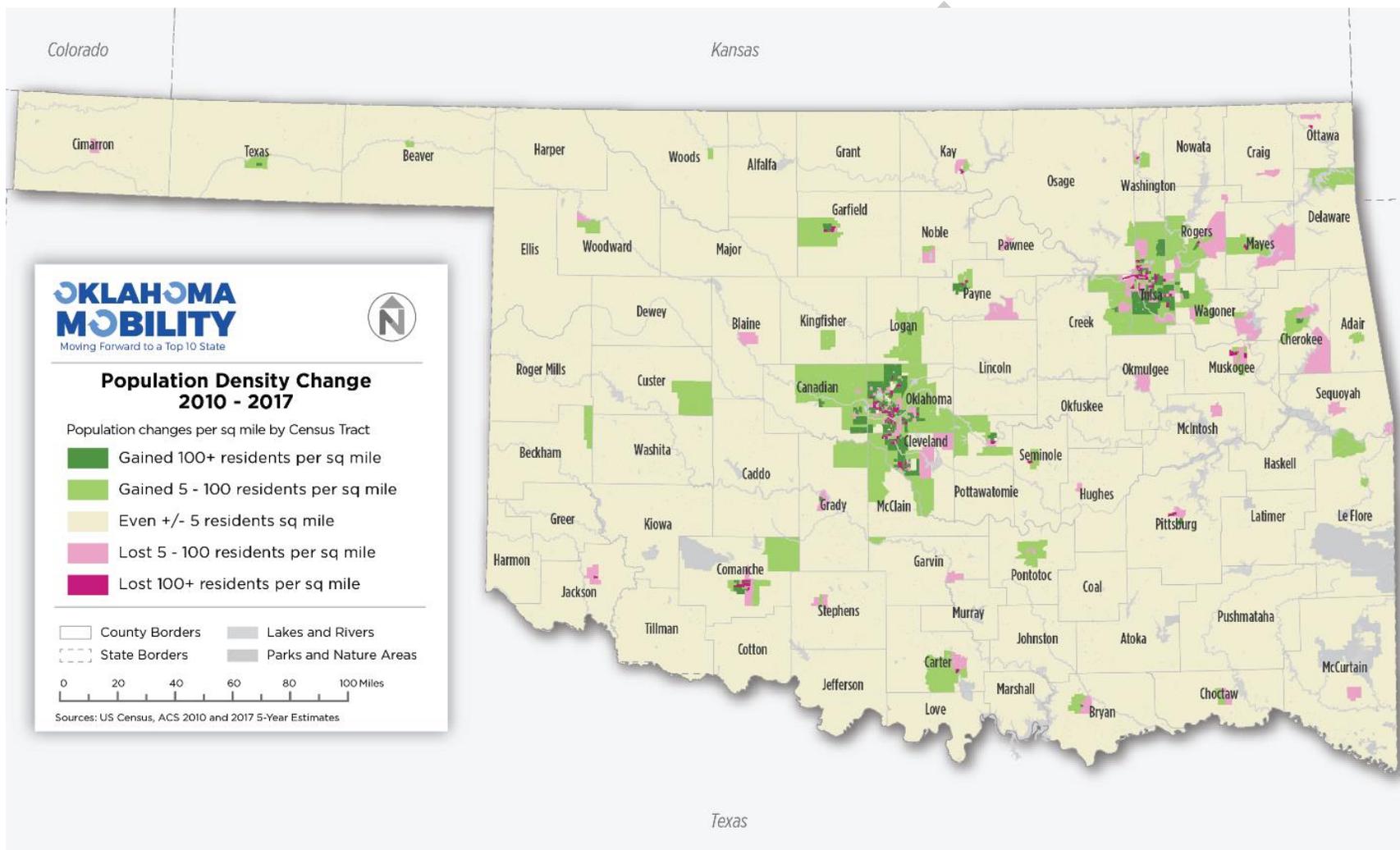


Figure 29: Change in Population, 2010 to 2017



## 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 that 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.<sup>8</sup> 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 have very high employment densities. 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%).<sup>9</sup> The Oklahoma City and Tulsa Metropolitan Statistical Areas both experience significant increases, with jobs increasing by 8.8% and 8.1%, respectively. 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 urbanized areas, overall employment increased by just 0.3%.

Beyond the state's major metropolitan areas, areas where employment density increased include:

- 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

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<sup>8</sup> Longitudinal Employer-Household Dynamics (LEHD) program (US Census, Center for Economic Studies)

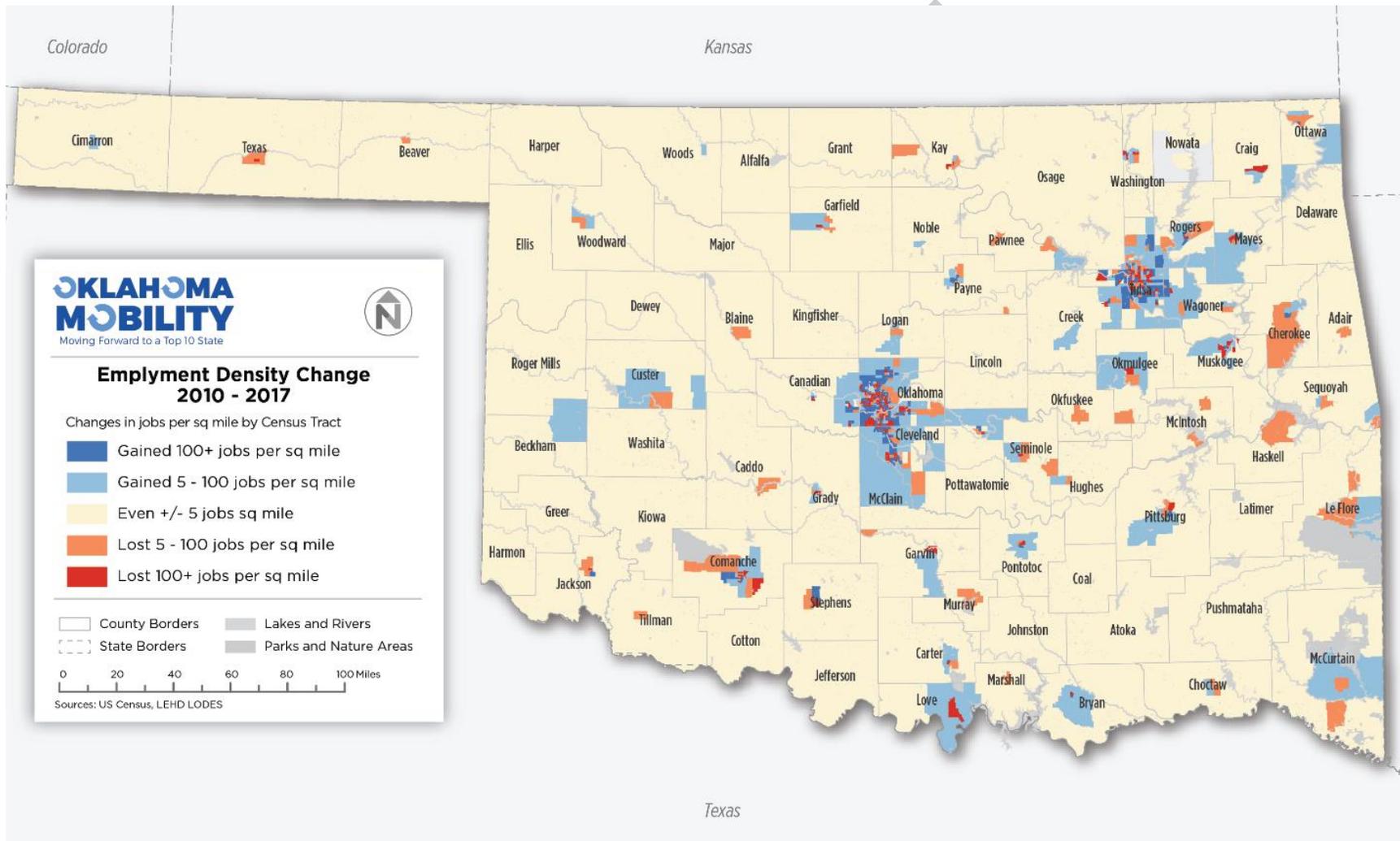
<sup>9</sup> Ibid.

- Durant

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Figure 31: Change in Number of Jobs, 2010 to 2017

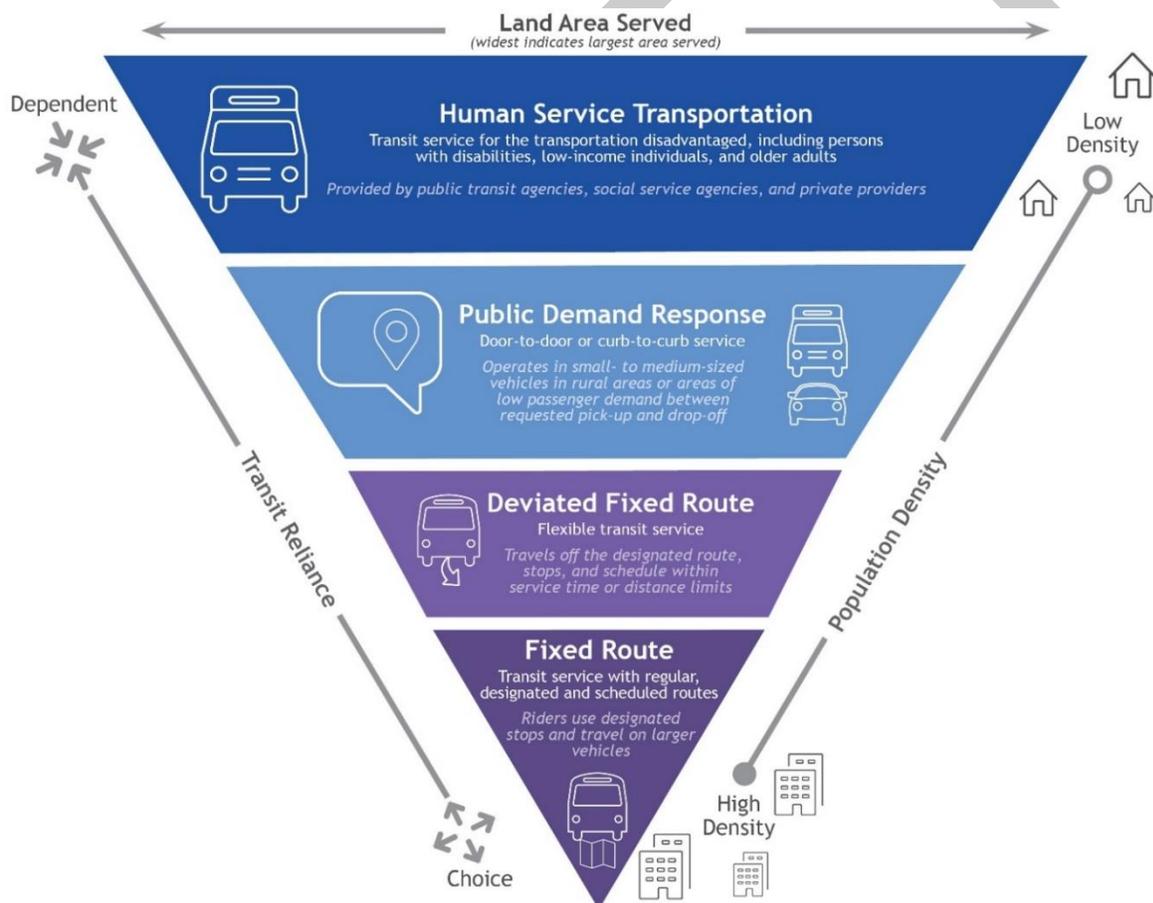


## Transit and Development Patterns

The study 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 for the area. 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 a minimum level of density to be effective.

The index presented in Figure 33 is not prescriptive and does not make suggestions about the specific frequency of service needed or the days of the week service should be provided; instead, it suggests the type of service that would likely be productive based on density and development patterns, and is intended to complement the findings of the Transit Propensity Index in Chapter 2 (see Figure 20).

Figure 32: Transit Service Hierarchy



When considering the population and job densities needed to support fixed-route bus service, 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 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 better service of traditional fixed-route transit service. 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 community.

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**Figure 33: Transit and Development Patterns**



Figure 34: Transit and Development Patterns - Oklahoma City Metropolitan Area

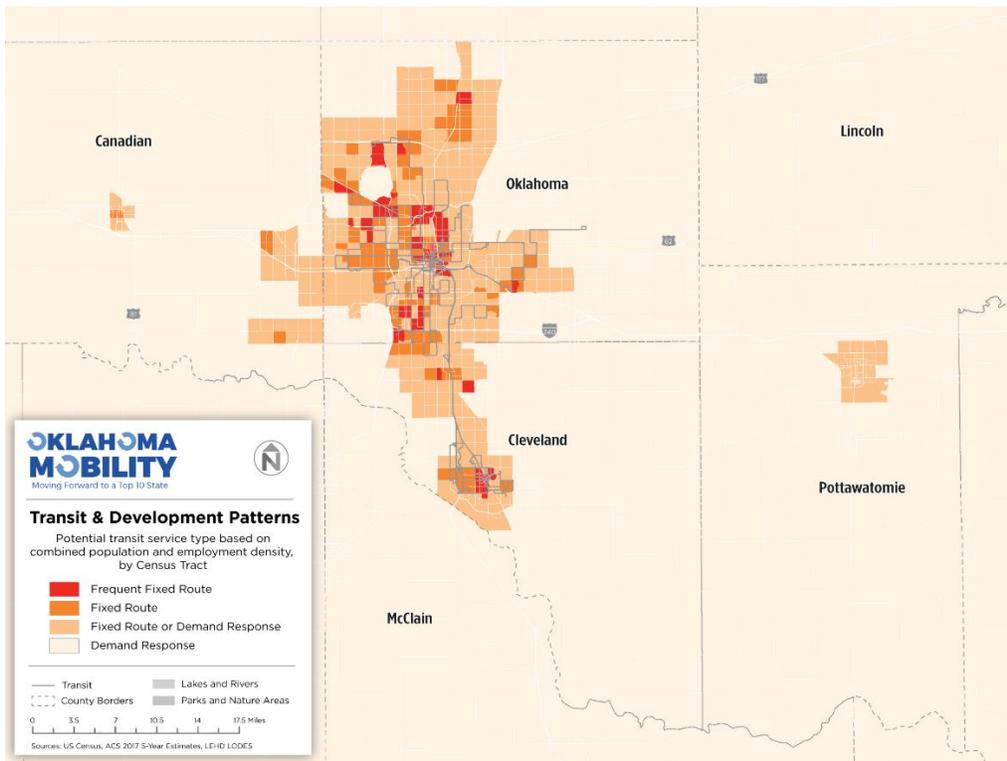


Figure 35: Transit and Development Patterns - Tulsa Metropolitan Area

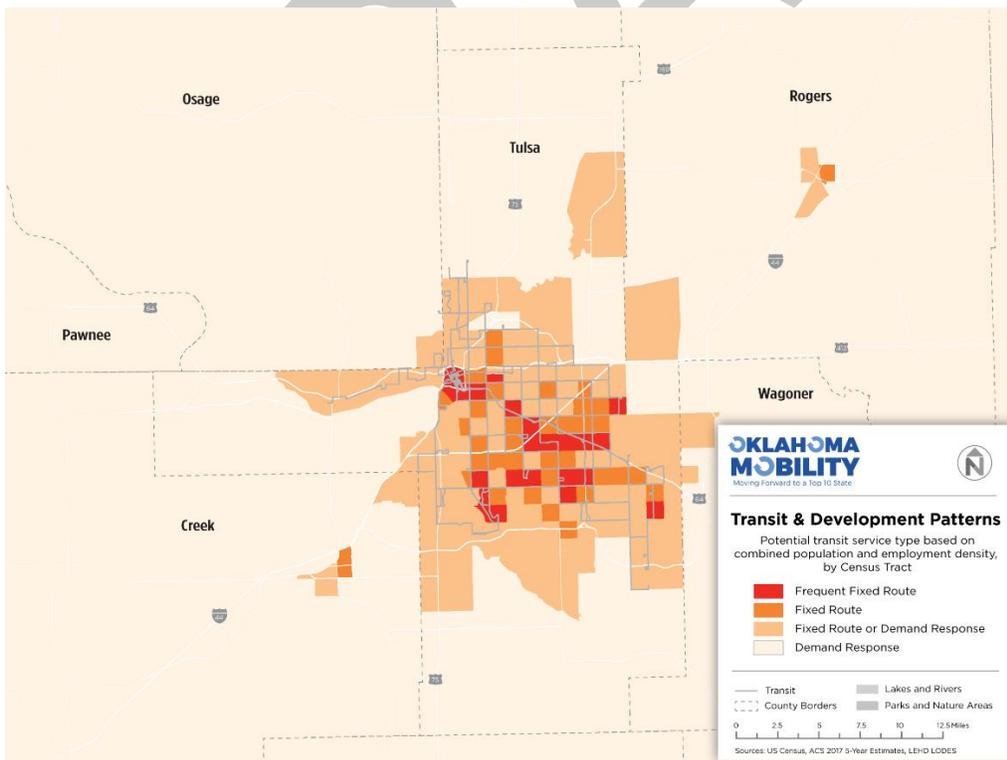


Figure 36: Transit and Development Patterns - Lawton Metropolitan Area/Comanche County

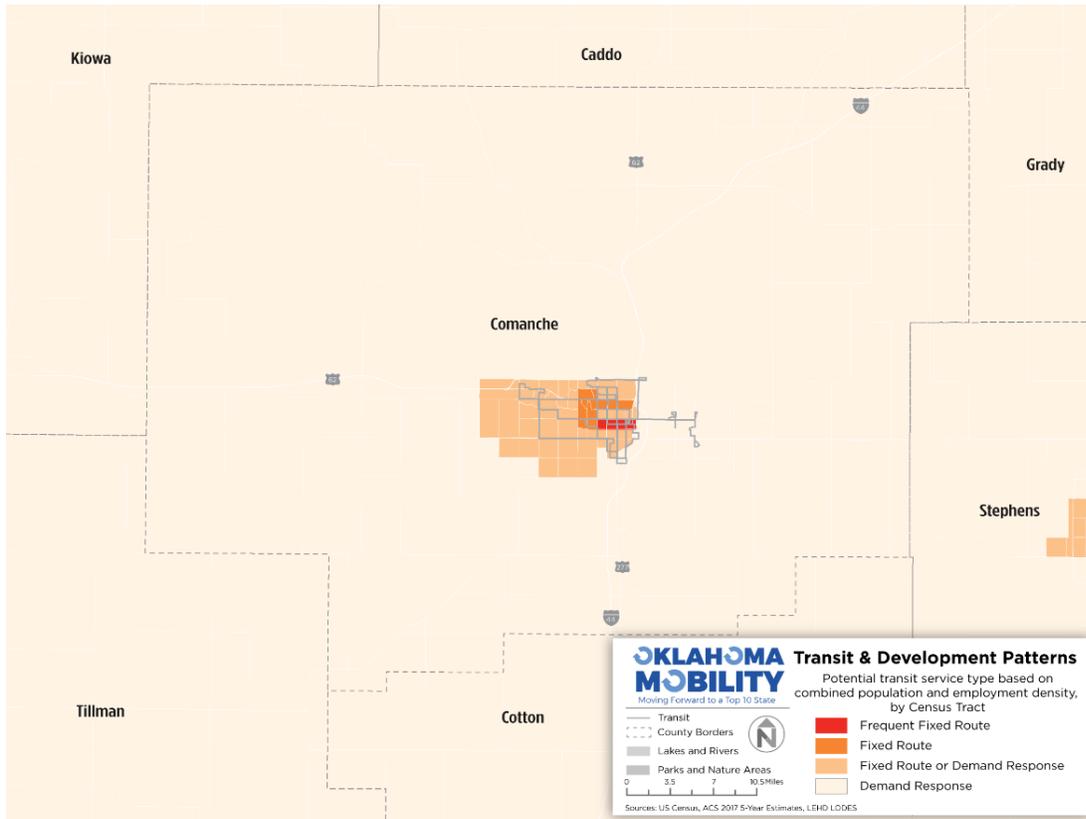


Figure 37: Transit and Development Patterns - Enid/Garfield County

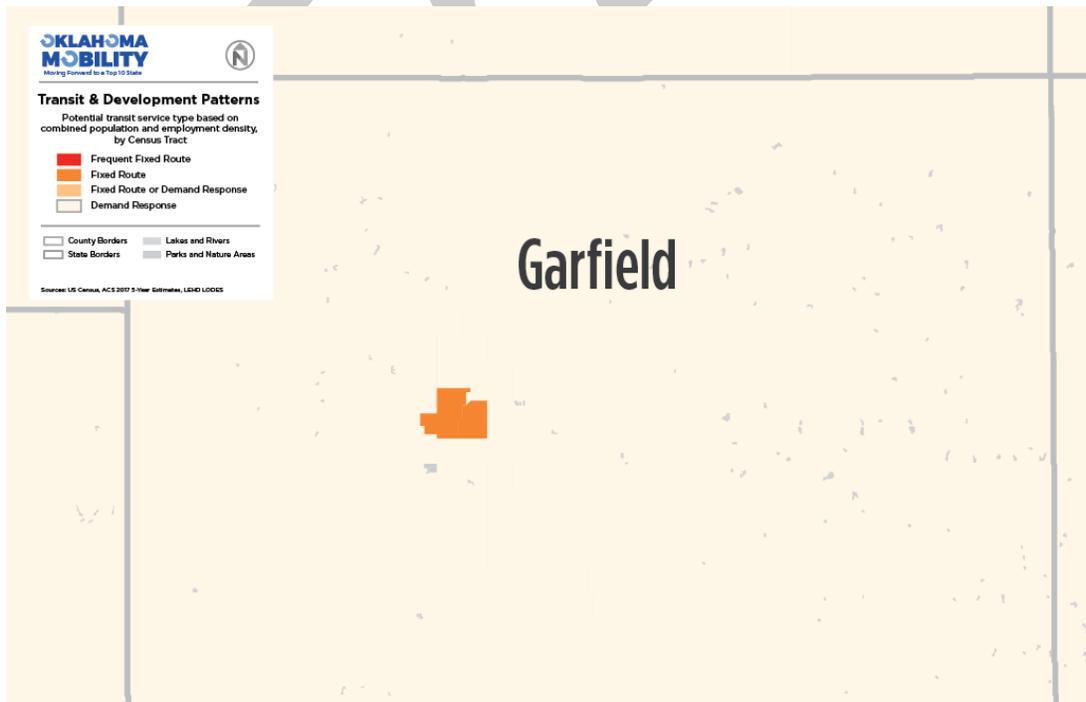
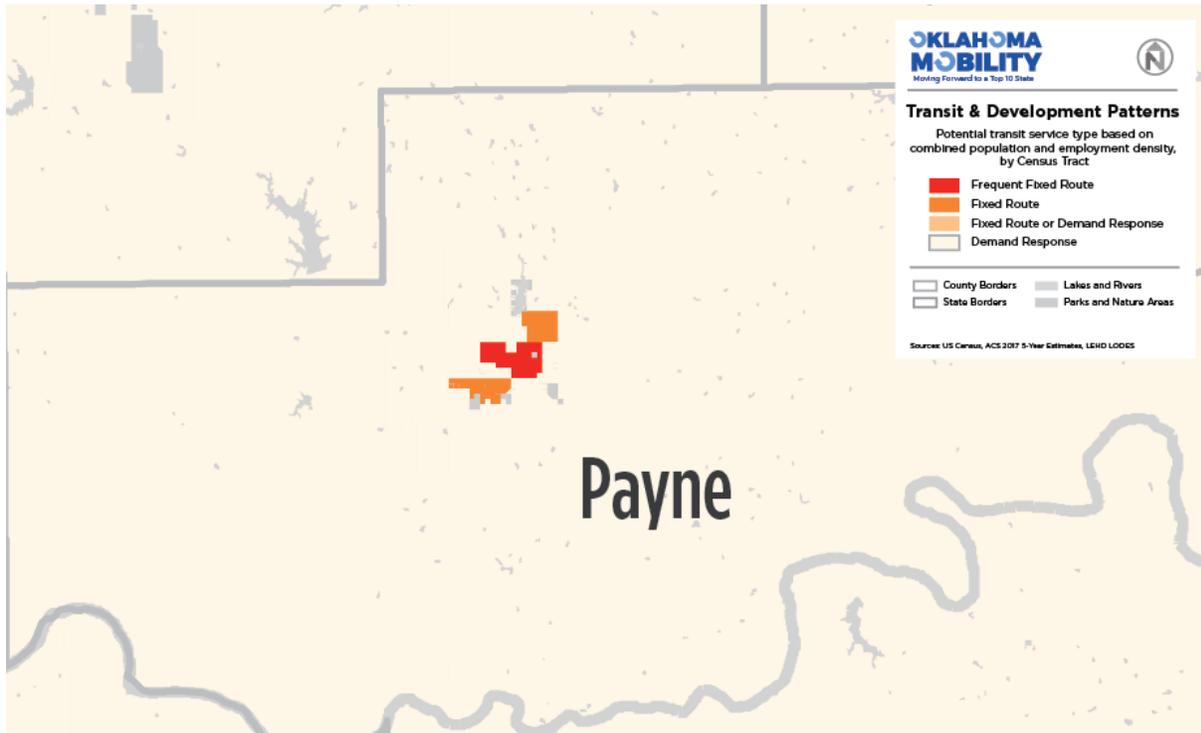


Figure 38: Transit and Development Patterns - Stillwater/Payne County



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## 4 Access to Needed Services

### Healthcare Facilities

Transportation is often cited as a major barrier to healthcare services. Limited access to medical services can lead to missed medical appointments, poor health outcomes and higher healthcare costs. Figure 39 shows the location of hospitals across Oklahoma.<sup>10</sup> 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 Urbanized Areas
- 46 short term hospitals located outside of Urbanized Areas

Access to medical services is also critical for Oklahomans enrolled in SoonerCare, the state's Medicaid program. As of March 2020, 785,366 residents are enrolled in SoonerCare, and 67% of those enrolled are children.<sup>11</sup> SoonerRides is the Non-Emergency Medical Transportation program in Oklahoma and provides well over a million rides annually to medical appointments.<sup>12</sup>

### 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.<sup>13</sup> The United States Department of Veterans Affairs (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, as shown in Figure 40.<sup>14</sup>

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<sup>10</sup> Oklahoma Hospital Association

<sup>11</sup> Logisticare

<sup>12</sup> Oklahoma Health Care Authority

<sup>13</sup> 2017 American Community Survey 5-Year Estimates

<sup>14</sup> US Department of Veterans Affairs

Figure 39: Hospitals in Oklahoma



Figure 40: Veterans and VA Facilities

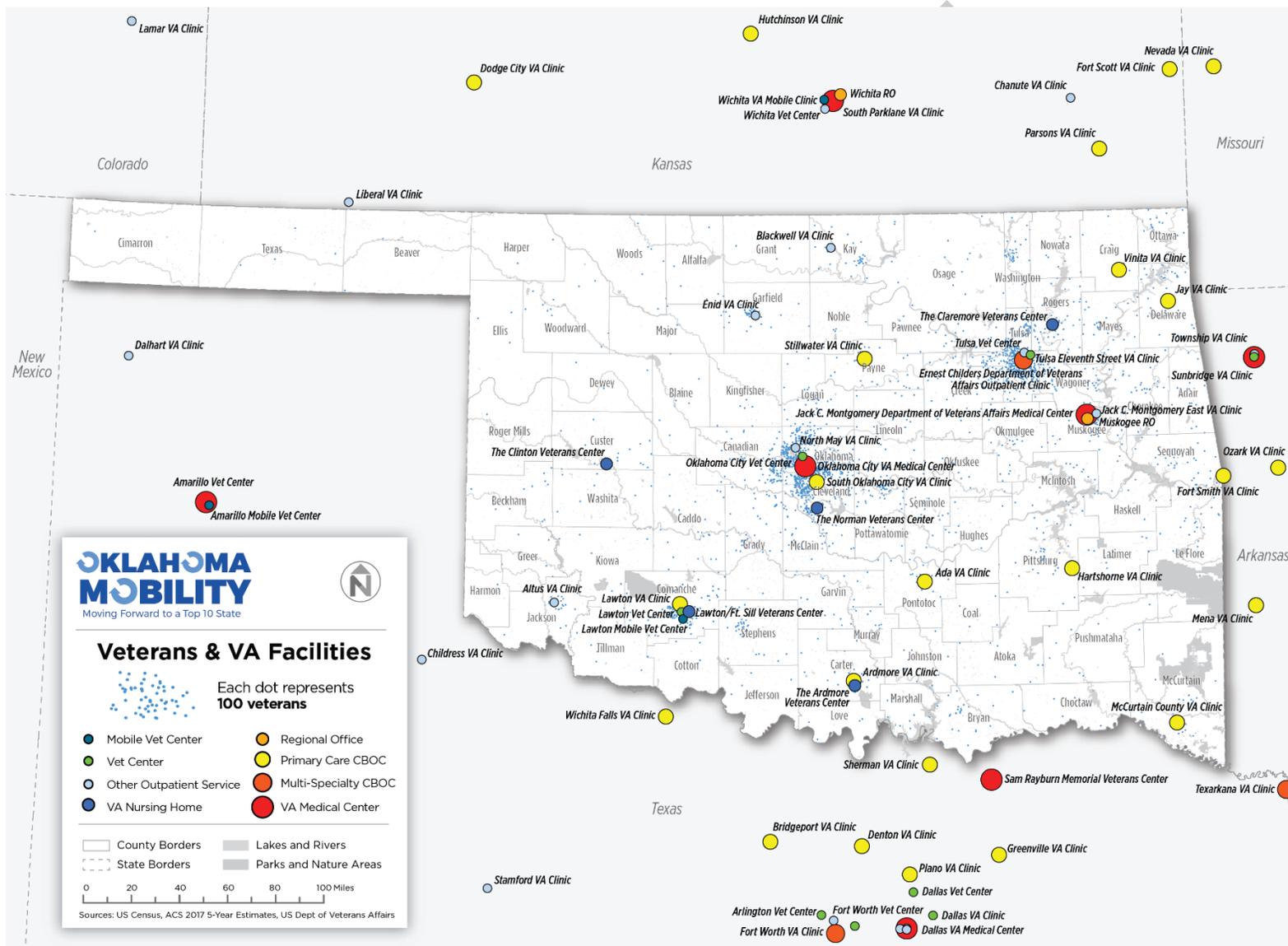


Figure 41: Veterans and VA Facilities - Oklahoma City Metropolitan Area

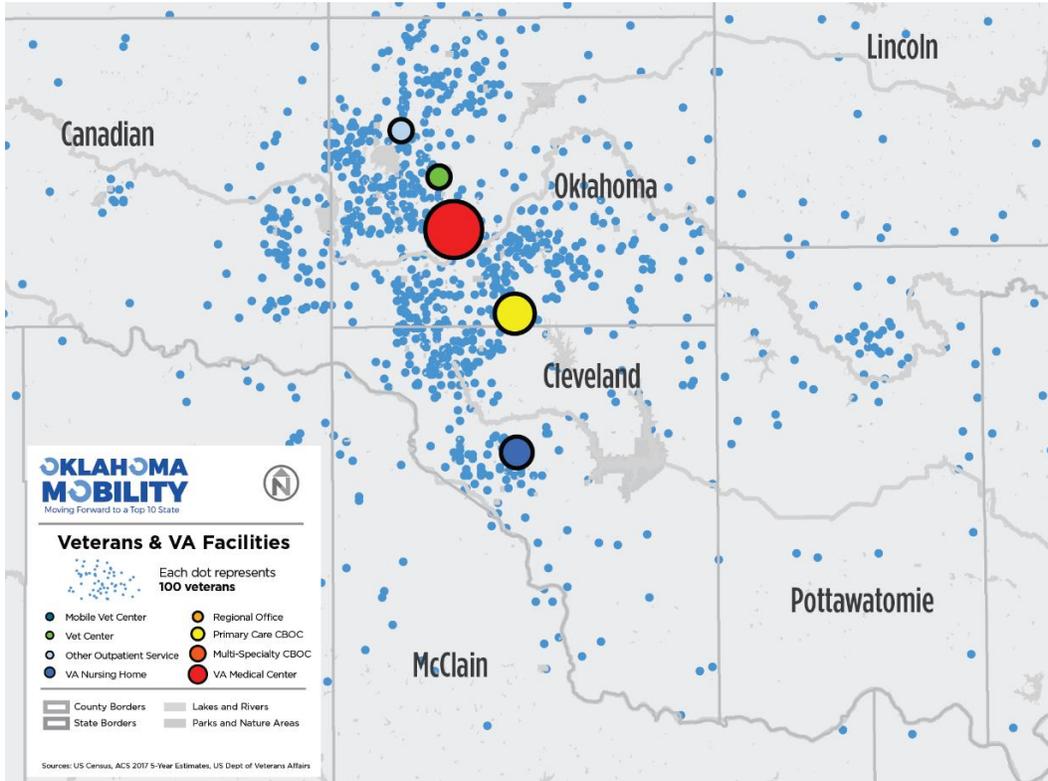


Figure 42: Veterans and VA Facilities - Tulsa Metropolitan Area

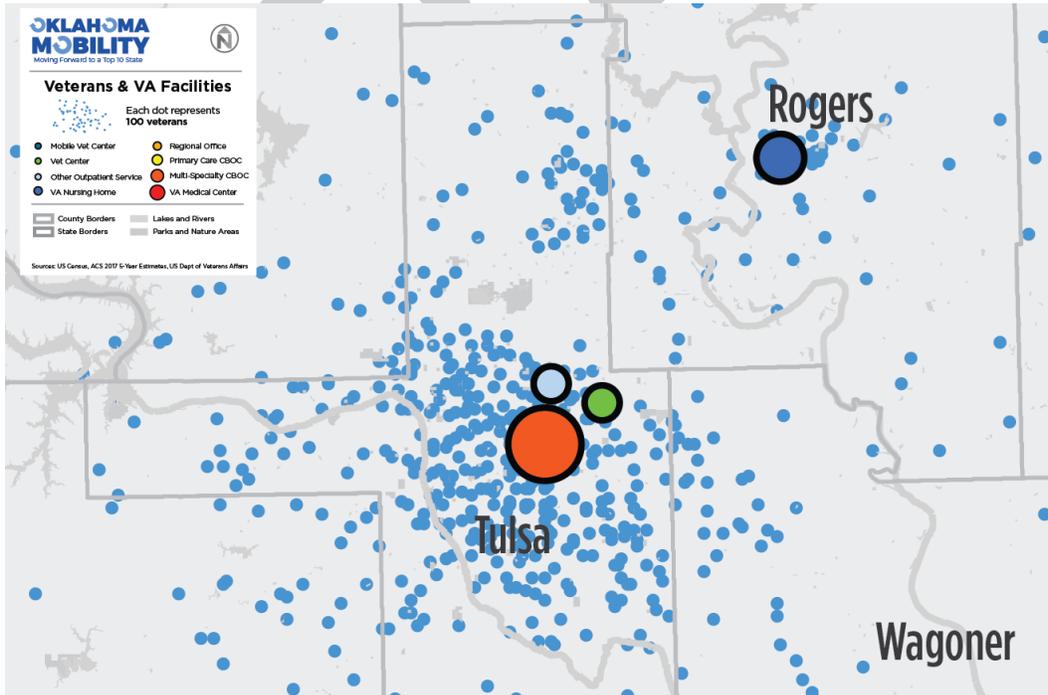


Figure 43: Veterans and VA Facilities - Lawton Metropolitan Area/Comanche County

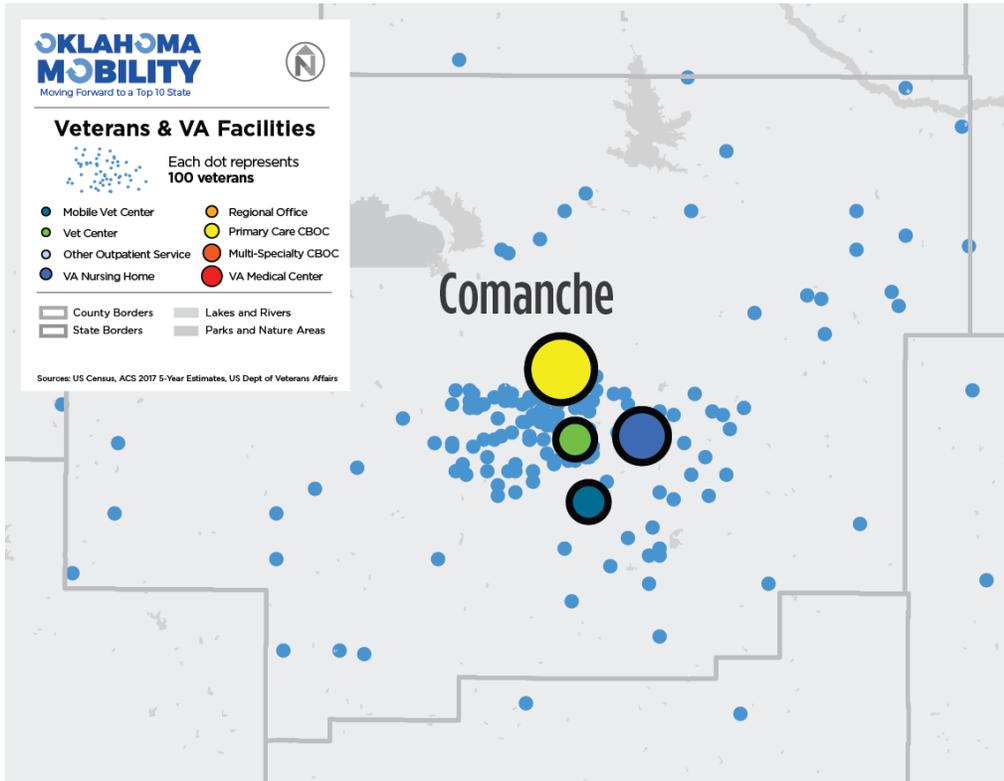
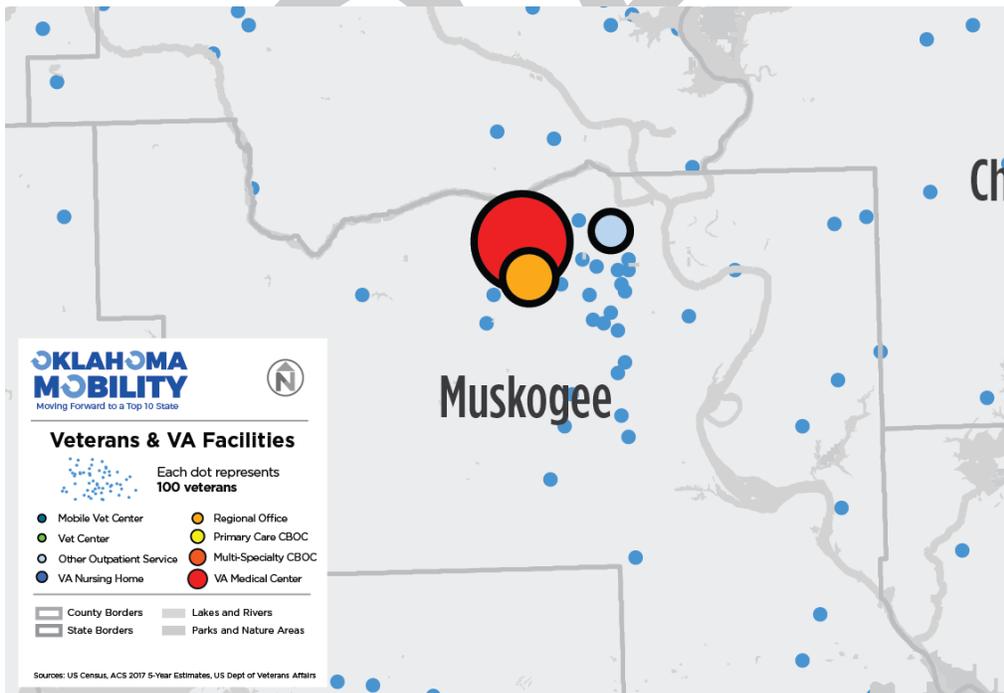


Figure 44: Veterans and VA Facilities - Muskogee County



## Food Access

Access to grocery stores and supermarkets with fresh food is crucial for the health and wellbeing of Oklahoma residents. However, in areas with few or no grocery stores, accessing fresh food presents a challenge for residents, and unreliable transportation intensifies this 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.

The United States Department of Agriculture (USDA) publishes the Food Access Research Atlas, which aims to quantify access to food by census tract.<sup>15</sup> 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 45 shows the Food Access Research Atlas index by census tract in the state of Oklahoma. Tracts that are 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 1 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

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<sup>15</sup> US Department of Agriculture Food Access Research Atlas, 2015



Figure 46: Food Access - Oklahoma City Metropolitan Area

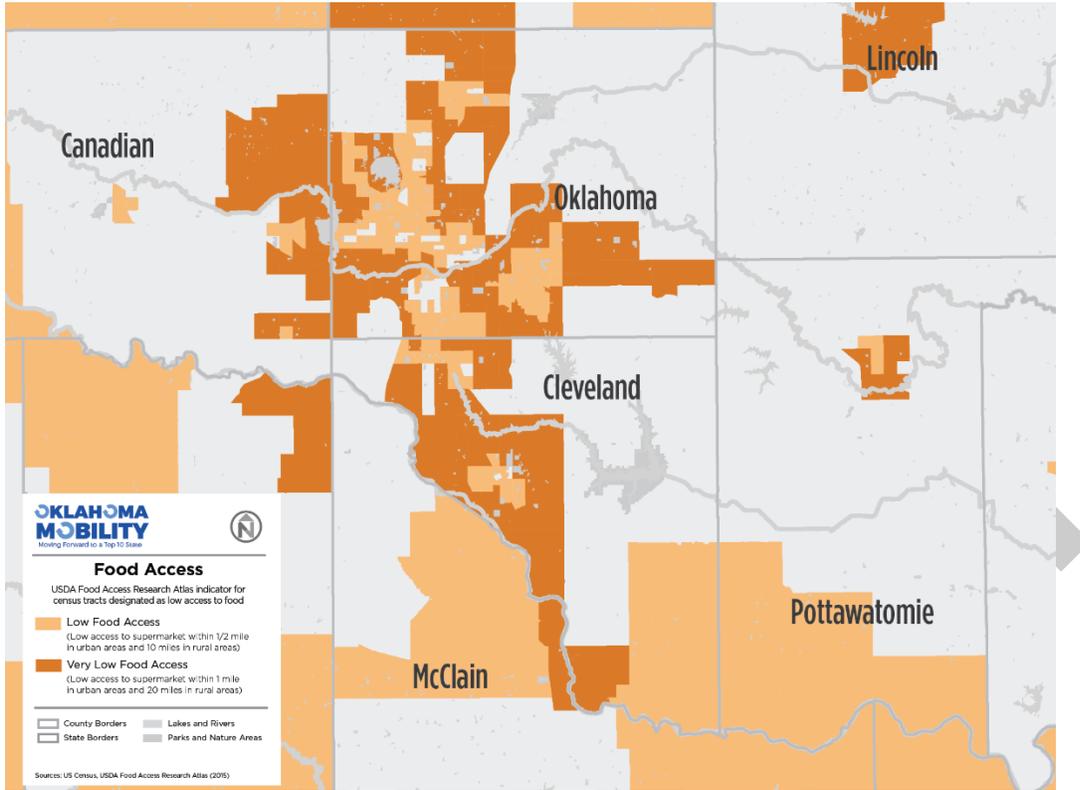
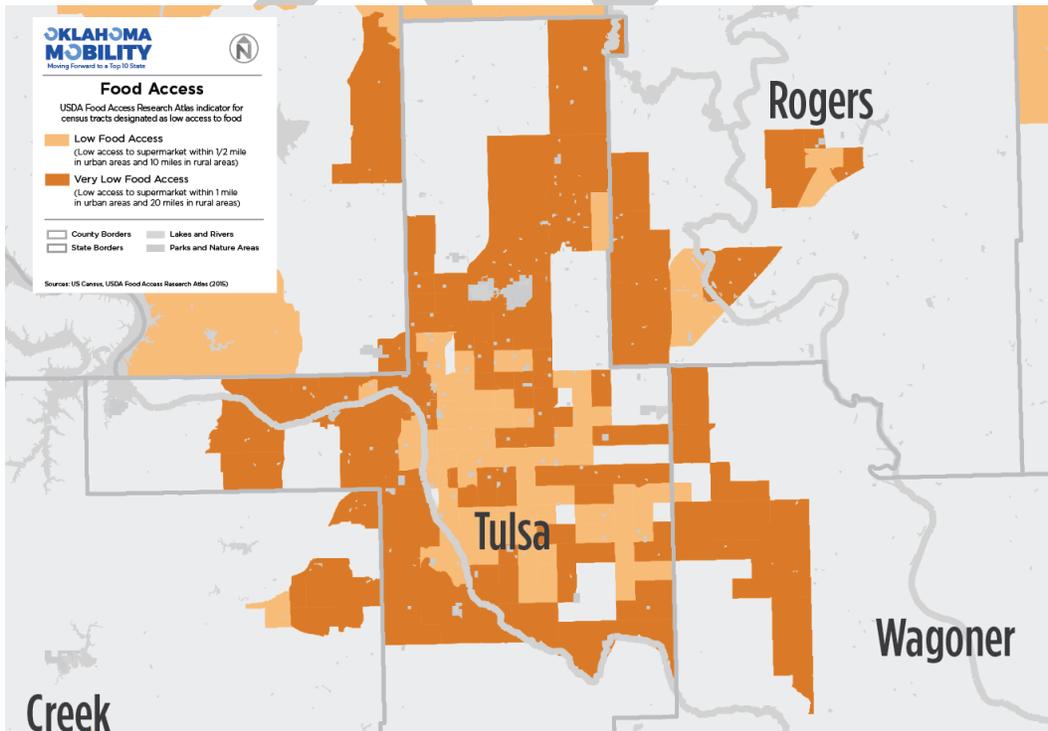


Figure 47: Food Access - Tulsa Metropolitan Area



# 5 Access to Jobs

## Major Employers

Large employers are in many cities and towns across Oklahoma (Figure 48). The very largest employers - those with 10,000 employees or more - are Tinker Air Force Base in Midwest 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 regions, 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 transit to meet long-distance transportation needs is critical in order to connect rural residents to job opportunities in both rural and urban areas.

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Figure 49: Large Employers - Oklahoma City Metropolitan Area

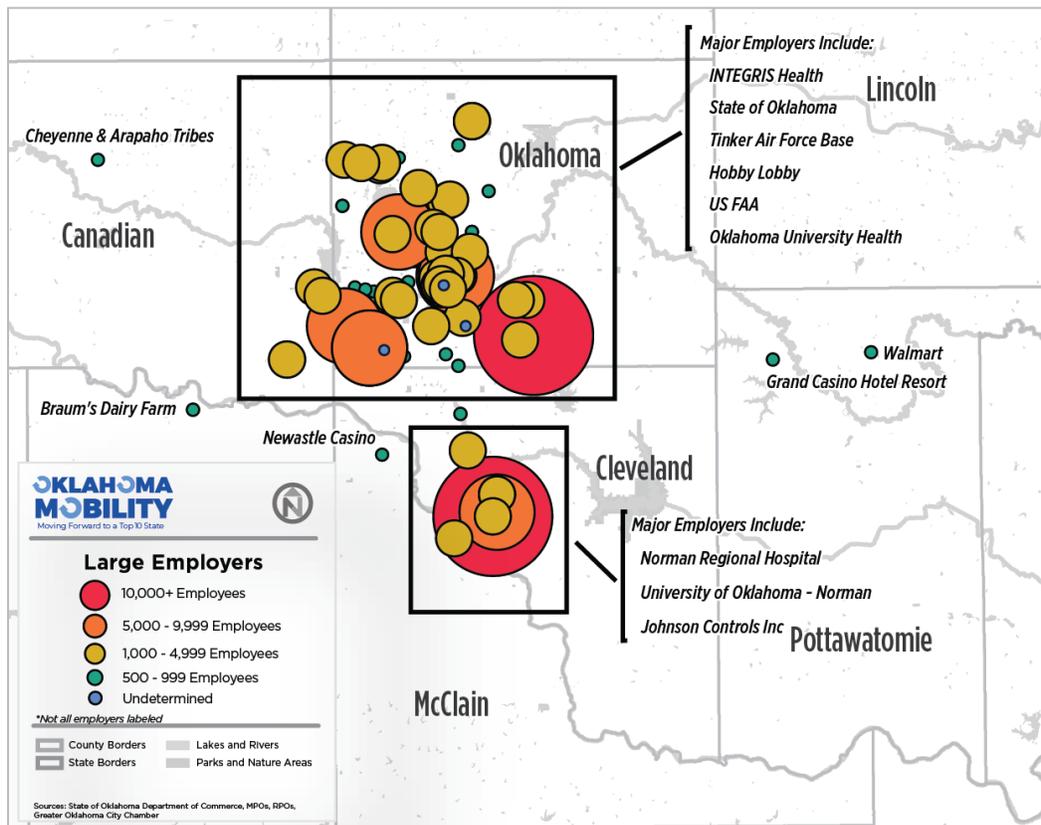
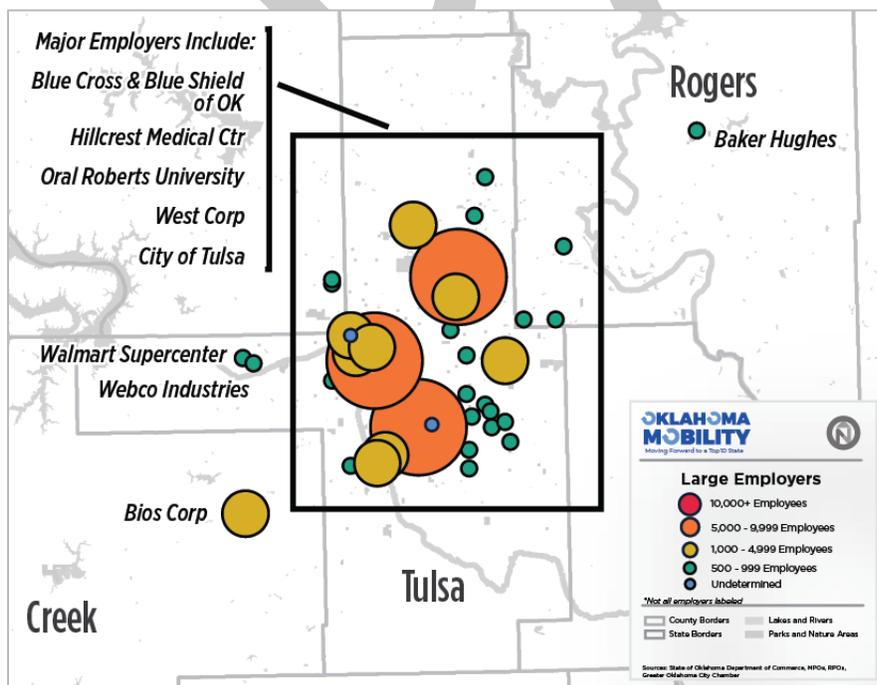


Figure 50: Large Employers - Tulsa Metropolitan Area



## Commuter Trips Between Counties

For transit to be effective, it must take people from where they are to where they need and want to go. Commuter travel flows show where the largest numbers of people are traveling from to get to work and are one resource to determine where direct or relatively easy connections should be made. Using commuter data available through the US 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.<sup>16</sup> The flows with the largest number of average daily trips are highlighted.

### All Commuters

The largest volumes of home-to-work trips are into Oklahoma and Tulsa Counties from their surrounding counties (Figure 51). 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.

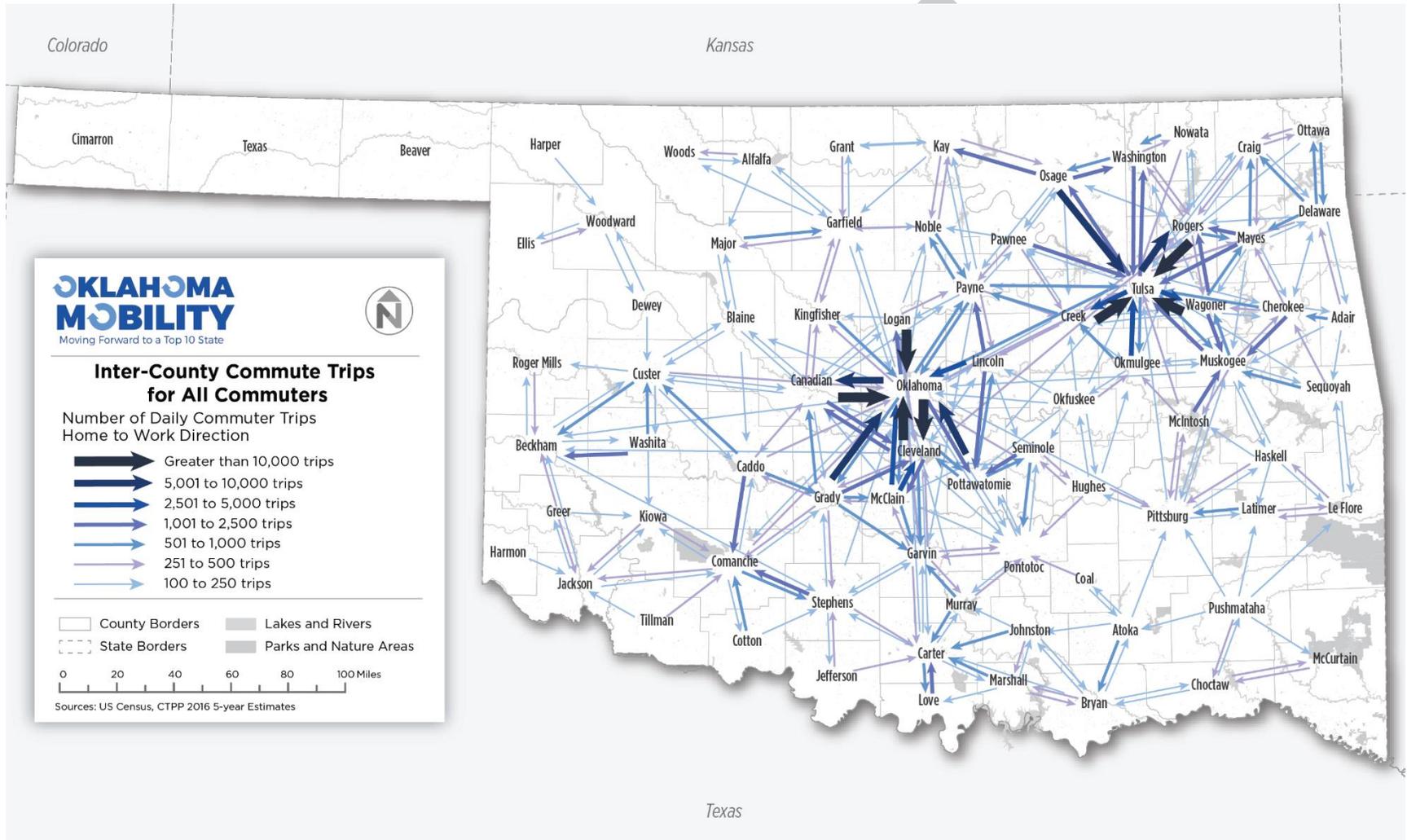
Other notable commute flows are described below:

- 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

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<sup>16</sup> Census Transportation Planning Products (CTPP) Program, 2016 5-Year Estimates

Figure 51: Inter-County Trips from Home to Work - All Commuters



## 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 (Figure 52). 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. A large number of 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.

## 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 (Figure 53). However, longer-distance commutes to Oklahoma County also can be seen from Grady County and Major 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 5am and 7am, the heaviest travel flows are from Cleveland County and Canadian County into Oklahoma County (Figure 54). 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 (Figure 55). 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.

Figure 52: Inter-County Trips from Home to Work - Commuters with Low Incomes



Figure 53: Inter-County Trips from Home to Work - Commuters Traveling 45 Minutes or Longer

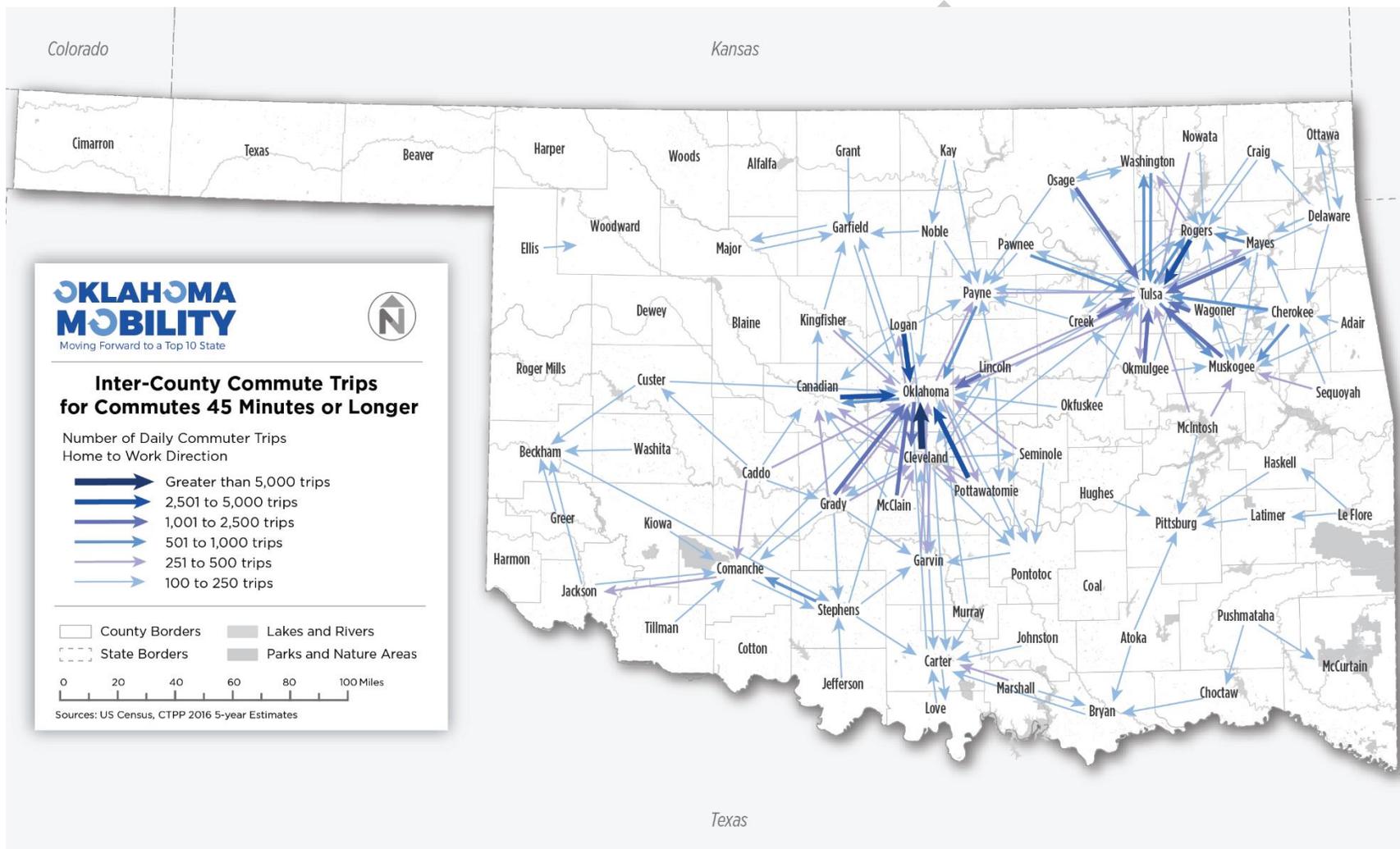


Figure 54: Inter-County Trips from Home to Work - Commuters Leaving Home between 5 AM and 7 AM

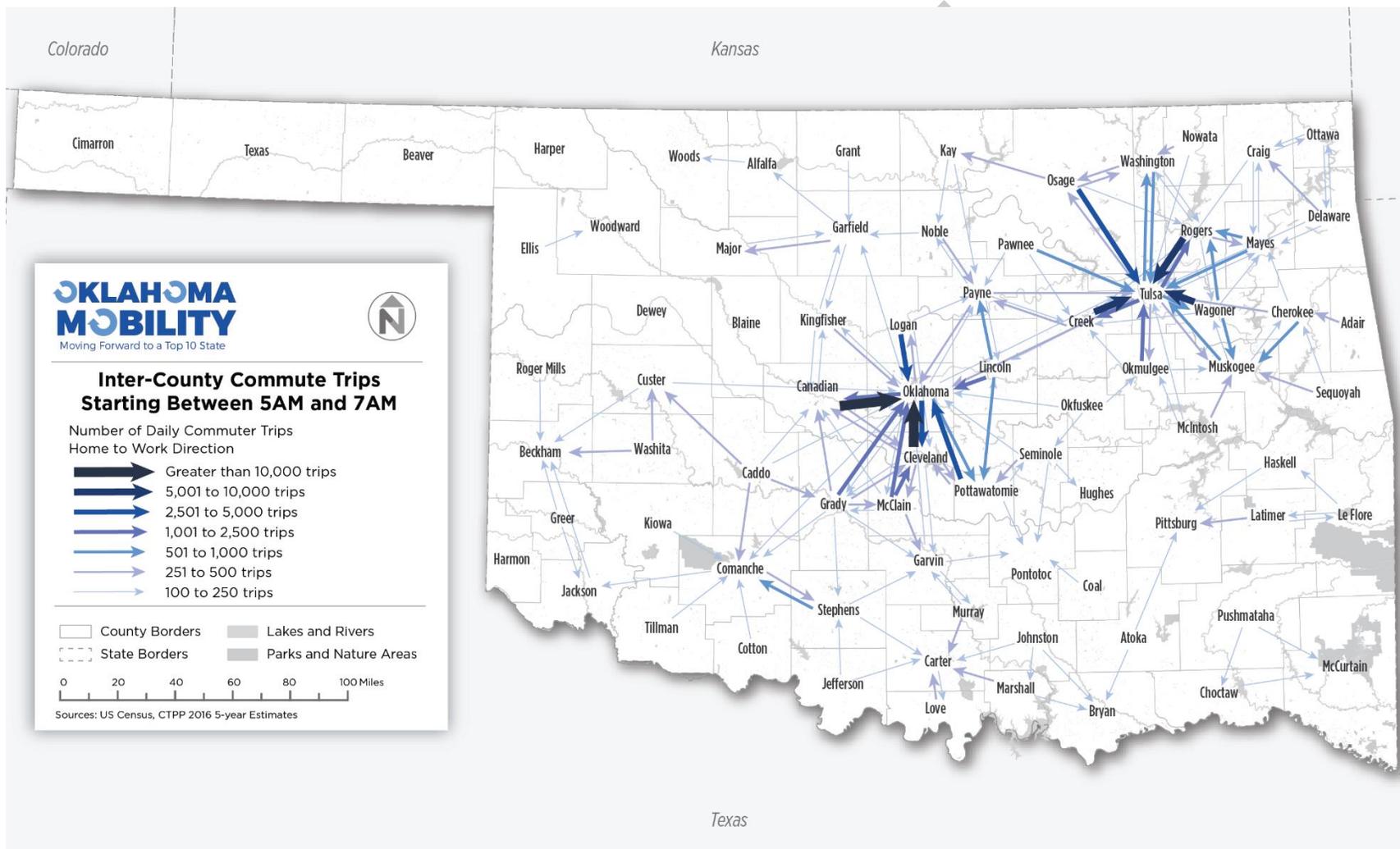
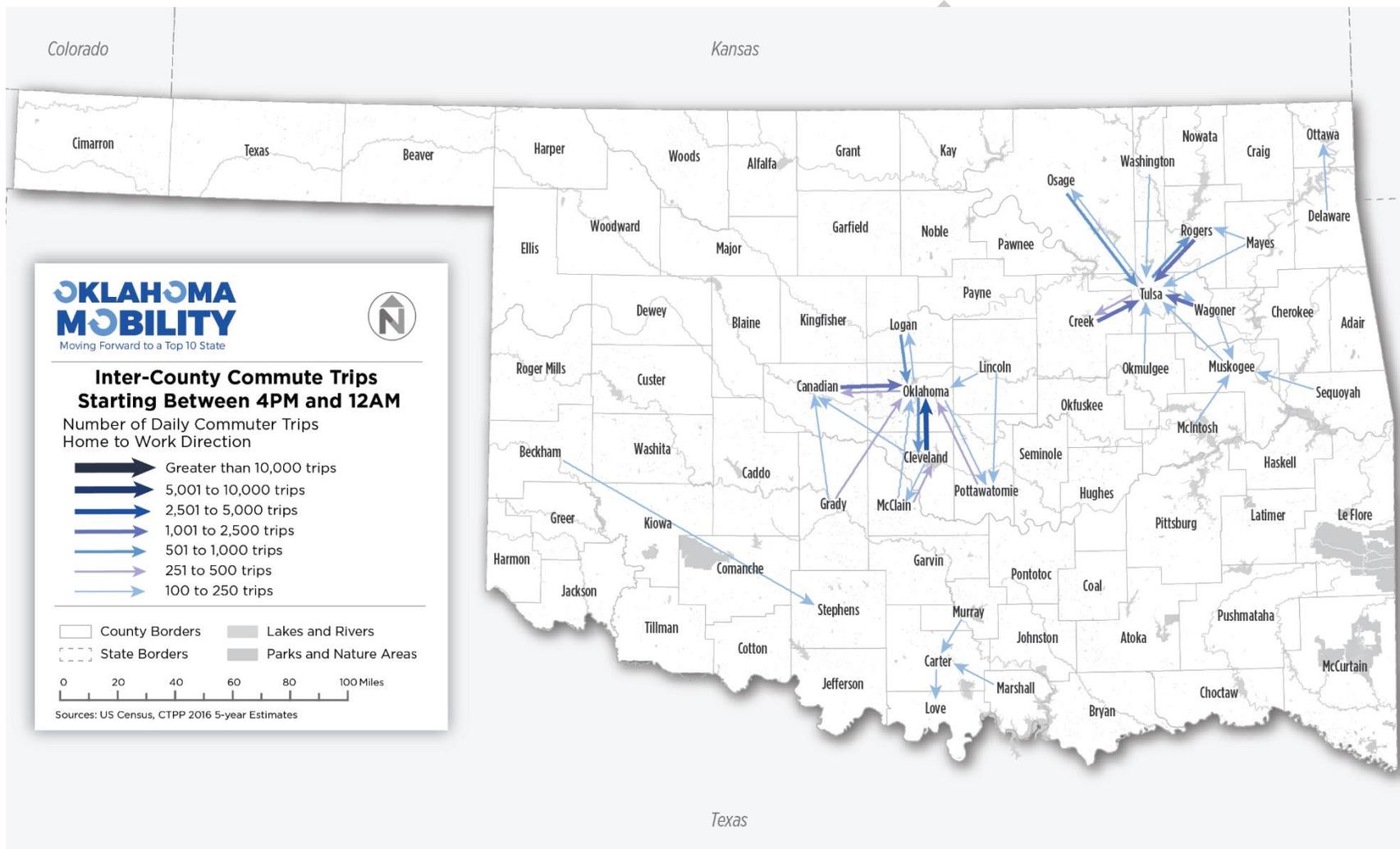


Figure 55: Inter-County Trips from Home to Work - Commuters Leaving Home between 4 PM and 12 AM



## 6 Next Steps

### Different Services for Different Contexts

There is no “one-size-fits-all” solution to address the variety of transit needs in Oklahoma. As this market analysis shows, every community across Oklahoma, regardless of size or location, has people who cannot reach jobs and basic services on their own. These needs may be local, 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, like Medicaid; they are typically available statewide, but trips are limited to and from specific appointments and activities. Public transit, on the other hand, includes transportation services available to members of the general public traveling for any purpose. A range of service types exist in Oklahoma, such as demand-response, fixed-route, and paratransit, designed to serve different types of communities and riders. How existing services meet the transportation needs in Oklahoma will be the focus of the State of the System report, identifying where resources are needed to best meet the transportation challenges, and opportunities, to improve mobility for all Oklahomans.

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