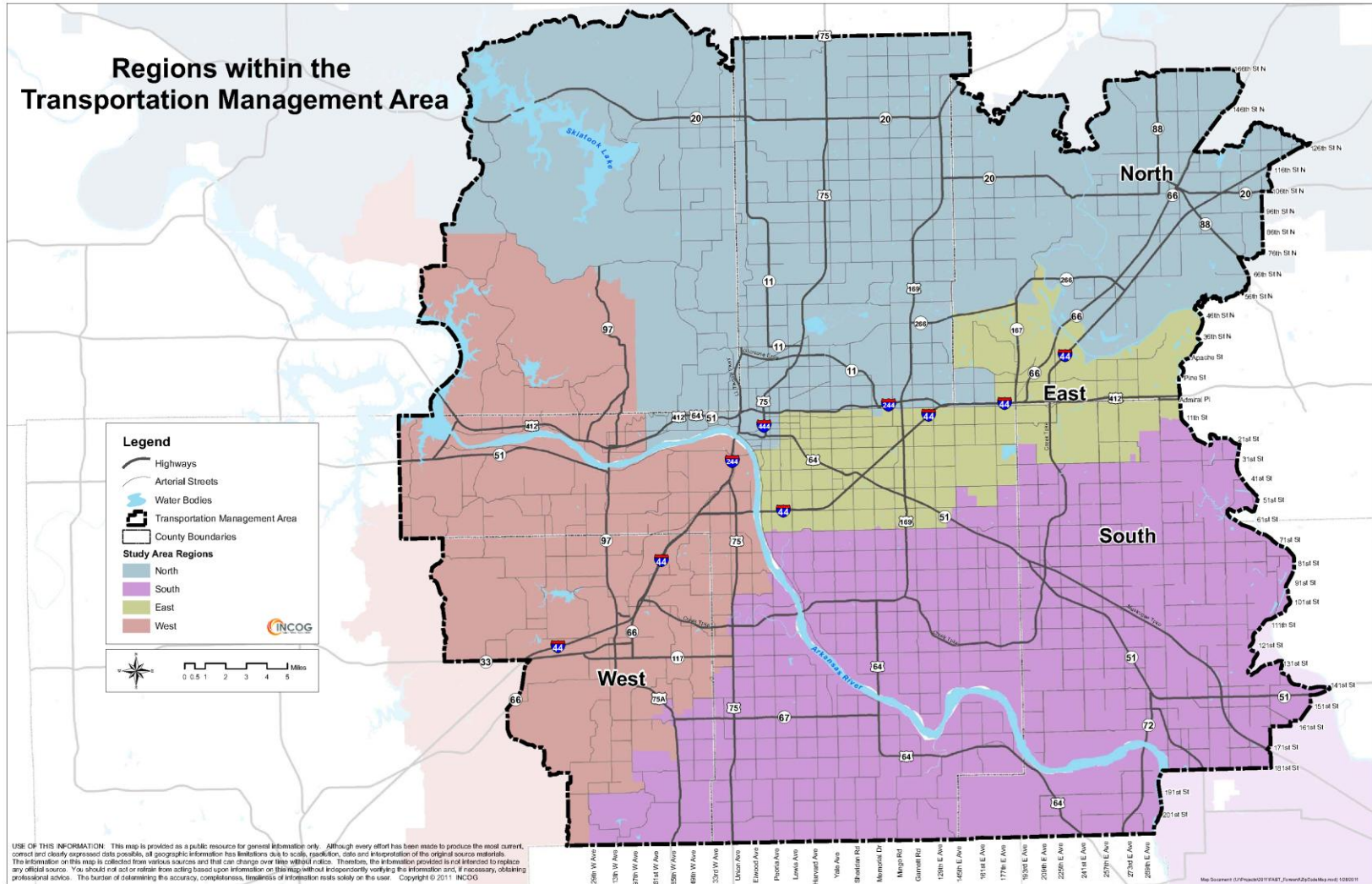


Tulsa Research and Highlight Charts

March 2011



Survey includes City of Tulsa and rest of the region



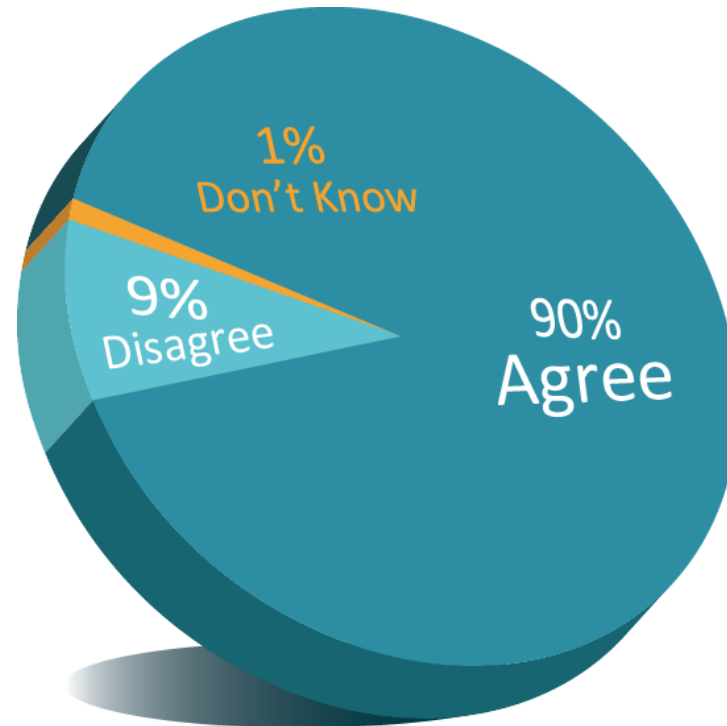
Part One: Phone Survey Results



Please tell me if you agree or disagree with each of the following statements: (% agree)

- 90% • I don't use public transportation but I support it because it helps others who don't have cars or can't drive.
- 85% • Investing in infrastructure projects like roads, rail transit and bridges is a good way to create jobs.
- 84% • Owning a car is getting more and more expensive.
- 77% • We need better transportation alternatives in order to keep our air clean
- 76% • Working people, seniors and young adults really need better public transportation alternatives than Tulsa has now.
- 74% • We need to invest in more transportation choices so we can reduce our dependence on oil
- 73% • If we had a better transportation system in Tulsa, it would help our economy.
- 72% • Other cities have much better transportation choices than we have.

“ I don't use public transportation but I support it because it helps others who don't have cars or can't drive ”



Source: INCOG Fast Forward Survey
2011

Please tell me if you agree or disagree with each of the following statements: (% agree)

- If we had a better transportation system in Tulsa, we would be able to attract more young professionals to our area. 64%
- I drive because I have to, not because I want to. 64%
- I'd like to be able to drive a little less than I do. 62%
- I love driving around the Tulsa region 55%
- We should spend our tax money only on maintaining and upgrading the roads we already have. 36%
- We shouldn't invest in public transportation because we need to spend resources on higher priorities. 36%
- We don't need any new transportation systems. 35%
- We don't need any other transportation choices because everyone drives their car here. 24%
- We shouldn't invest in public transportation because no one uses it. 13%

Overall, how important do you think it is for elected leaders in the region to encourage the development of alternatives to the car?

- Very important 45%
 - Somewhat important 40%
 - Not important 15%
- } **85%**

Would you be more willing, less willing or stay the same in terms of voting for an elected official who is strongly in favor of improving Tulsa's public transportation system?

- More willing 49%
 - Stay the same 40%
 - Less willing 8%
 - Don't know 3%
- } **89%**

For each of the following issues, tell me whether you want your elected officials to consider it a high, medium or low priority over the next five years?

High priority – 60%+

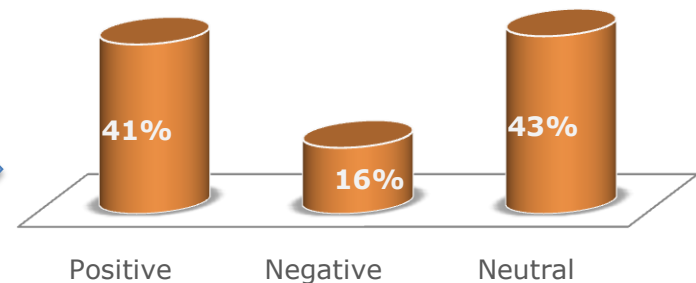
- | | |
|----------------------------|-----|
| – The economy and jobs | 88% |
| – Education | 78% |
| – Health care | 71% |
| – Cost of living and taxes | 68% |
| – Public Safety | 66% |

- 36% have taken transit (bus) in Tulsa
- 12% are regular riders (at least once a week)
- 41% rate it a positive experience
- 72% have taken transit elsewhere

Of those that took transit, what was the experience like?



Experience Riding Tulsa Bus



Key drivers for increasing transit use

Of the following choices, which would help you use public transportation more often?

	"Yes"
• Streetcars or rail transit service instead of buses	52%
• More frequent service	52%
• More extended service hours	51%
• More express buses	50%
• Lower fares on buses	48%
• Better quality buses and seats	46%
• Wi-fi on buses	28%

- Congestion on highways
 - Current problem 56%
 - Emerging problem 21%
 - Not a problem 20%

- Air quality
 - Current problem 34%
 - Emerging problem 32%
 - Not a problem 30%

- Lack of public transportation/bus service
 - Current problem 36%
 - Emerging problem 26%
 - Not a problem 33%

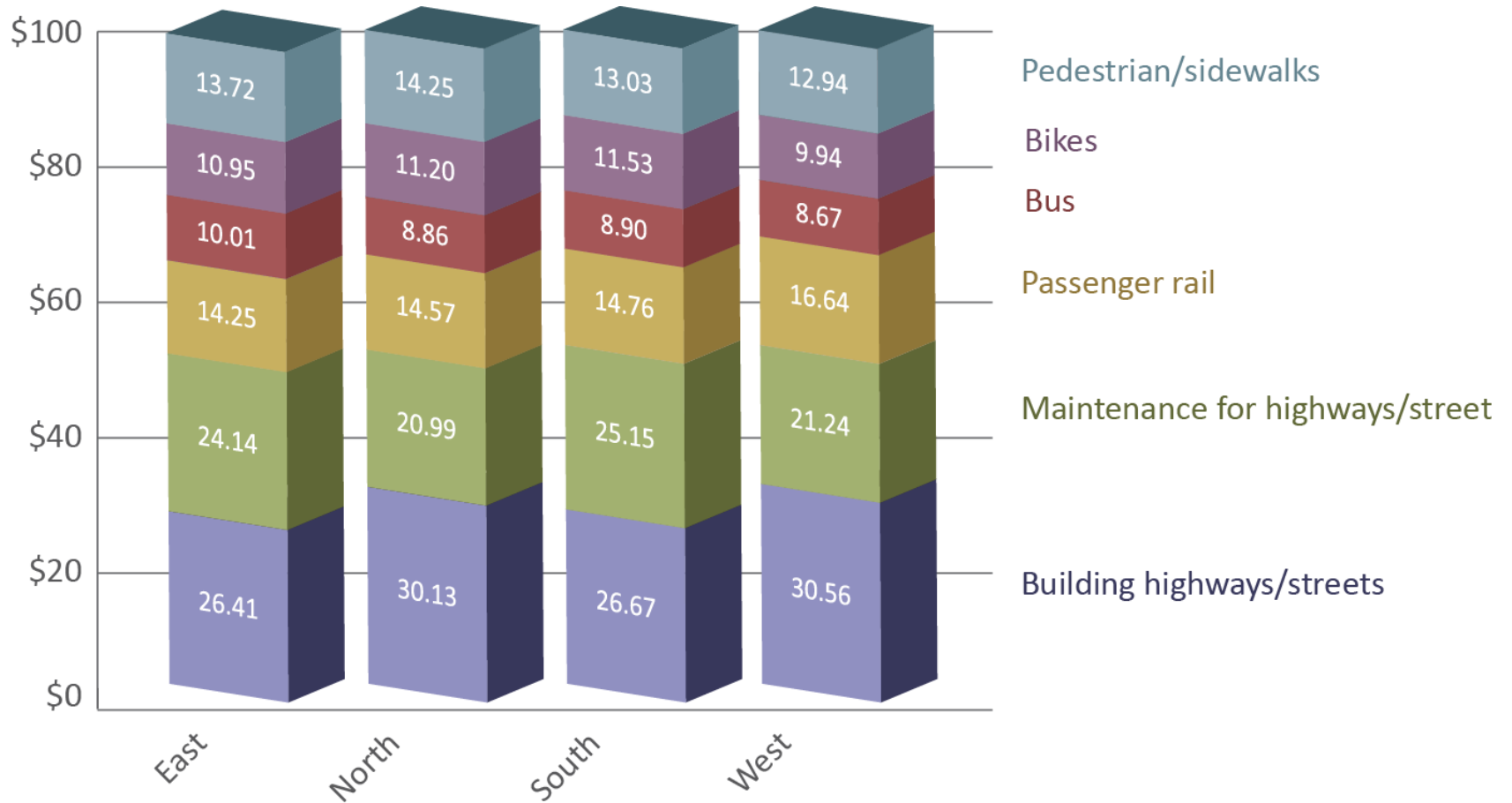
General public wants a better balanced split than existing plans call for.

	Survey results
– Highways and streets	\$52
– Public Transportation	\$28
– Bicycle/Pedestrian	\$20
	} \$48

2009-2010 Transportation Spending	
\$80	
\$17	} \$20
\$3	

Source: INCOG

\$100 question by region



Part Two: In-depth Interviews



- Community leader feedback is consistent with the polling data - no incongruence
- Chasm exists between those who are only interested in rail – and those who want the bus system fixed first.
- View of Tulsa transit is anemic
- Overpowering interest in light rail - very ho-hum about BRT, trolley, streetcars – Reason is driven by economic development considerations and expectations about ridership
- Bike and ped support is strong, but not as “transportation” more as “recreation”
- Concern about funding; no real sense of what is possible
- Dreams vs. Constraints – some tension exists

- Deep connection to the human side of public transportation.
- Can visualize students going to their part time job at the mall, single moms going to work, disabled veterans getting to their therapy, seniors going to the doctor, working people getting to work without spending hours and hours just to get there.

Part Three: Appendix

- INCOG provided Collective Strength a list of regional stakeholders to be interviewed
- A total of 111 interviews were conducted
- The one-on-one qualitative interviews were conducted via phone or in-person during October and November of 2010 on a confidential basis – meaning the stakeholder names are not associated with the responses.
- A list of stakeholders who participated is available from INCOG.

- 1,000 quantitative interviews with members of the general public in the Tulsa region were conducted using standard market research practices mirroring the US demographic estimates.
- The survey was conducted in October and November of 2010 and is accurate at the +/- 3% level.
- For more detailed information on the research contact INCOG.



- Do you live inside the city of Tulsa, in a suburb of Tulsa or in a rural area near Tulsa?
 - Rural 34%
 - Tulsa 38%
 - Suburb 23%
 - Don't know 6%

- Race
 - Caucasian 70%
 - African American 10%
 - Hispanic 7%
 - American Indian 8%
 - Multi-racial/other 4%
 - Asian/Island Pacific 1%

- Have you lived in Tulsa all of your life or did you move here as an adult?
 - All my life 37%
 - Moved as an adult 52%
 - Moved as a child or teen 9%

- What is your age?
 - 18-34 28%
 - 35-44 19%
 - 45-54 20%
 - 55-64 15%
 - 65+ 17%

- Would you say your total annual household income is:
 - Under \$20,000 21%
 - \$20,000 to \$49,999 35%
 - \$50,000 to \$99,999 26%
 - \$100,000 or more 10%
 - Don't know/refused 7%

List of In-depth interviewees

John Bowman
Mark Liotta
Rodney Ray
Bill Cartwright
Dave Wooden
Mike Tinker
Mike Neal
Jeff Mulder
Karen Keith
Doug Enelveson
Bruce Ford
Rich Brierre
Farhad Daroga
Michael Lester
Rick Westcott
Theron Warlick
Michael Bates
Howard Barnett
Gary Stanislawski
Jeannie McDaniel
Kara Gae Neal
Derek Gates
Dana Weber
Trish Richey
Ray Bowen
Jamie Jamieson
Clark Weins

David Charney
Michael Reed
Vic Vreeland
Minister Greg Taylor
Craig Thurmond
RJ Walker
Russel Crosby
Lori Mathis-Long
Gary Percefull
Jimmy Jobe
Ron Weese
Barbara VanHanken
Gary Akin
Dr. Gerard Clancy
Teri Bowers
Paul Kane
Robert Bell
Don Walker
Sandra Lewis
Ren Barger
David Breed
Jefry Tomlinson
Rick Webb
Michelle Cantrell
Tom Meshek
Shane Fernandez
Alan Ringle
Joe Fallin

Sarah Kobos
Dr. Tom McKeon
Fred Perry
Robert Endicott
Derek Campbell
Ben Chaney
Susan Neal
Corey Williams
Phil Lakin
Jim Lyle for Tallia Shaull
Charles Hardt
Rose Washington-Rentie
Christee Jenlink
Jonathan Bolzle
Brian Paschal
Jared Cottle
Richard Boone
Sabrina Ware
Darton Zink
OC Walker for Julius Peugues
John Smaligo
Bill Major
Stan Lybarger
Jim Goodwin
Jeff Dunn
Eunice Tarver

Chris Tiger
Scott Gibson
Dr. Donald O'Neil Tyler
Mike Bunney
David Lafon
Ed Sharrer
Marla Mayberry
Steve Todoroff
Nate Waters
Tom Adelson
Bob Walker
Mark Radzinski
Linda Jordan
Stanton Doyle
Mike Hayes for Mike Case
Delise Tomlinson
Susan Kimball
Frank Dickinson
Dwain Midget
Jack Henderson
Scott Graham
Nadia Guevara
Sharon King Davis
Ken Busby
Clarence Boyd
Elaine Meek
Clark Miller
Dewey Bartlett
Rodrigo Rojas
Susie Sharp



*Move the economy.
Find A Solution with Transit.*

For more information regarding the research contact James Wagner at INCOG

*Two W. Second St., Suite 800 Tulsa, OK 74103
Phone (918) 584-7526 FAX (918) 583-1024*

fastforwardplan.org