2009 Commuter Store Study

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OVERALL STUDY PURPOSE:
暌 To understand how ACCS’ Commuter Store™ concept is currently performing.
 Sabha To identify ways to improve the product and service delivery.
 Sabha To measure the overall impact of ACCS’ investment in the Commuter Store.
 Sabha To benchmark against 2007 Commuter Store Study

OBJECTIVES OF RESEARCH:
 Sabha Profile ACCS’ Commuter Stores’ current users.
 Sabha Identify what prompted store visit.
 Sabha Assess the current customer experience and related satisfaction with ACCS’ Commuter Stores.
 Sabha Identify store users’ needs for commuter information, fare media, and trip planning assistance services.
 Sabha Understand extent to which store is meeting needs - based on attributes of “retail experience” (i.e., customer service, store layout, information, etc.).
 Sabha Find perceived opportunities and challenges with stores' existing products/services.
 Sabha Identify return on investment/impact of the commuter stores. Results/outcomes of store services – did they influence or support travel change.
Understand the previous from different perspectives - by audience sub-segments – e.g., repeat customers vs. first time, etc.

**METHODOLOGY:**

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<thead>
<tr>
<th>Mode of Data Collection</th>
<th>Store intercepts</th>
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<tbody>
<tr>
<td>-</td>
<td>5-question pre-survey</td>
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<td>-</td>
<td>Follow-up online survey in store (with ability to finish in another location if necessary)</td>
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<td>$5 Gourmet Coffee Card incentive for online survey completion</td>
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<table>
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<tr>
<th>Completed Surveys</th>
<th>1,008 paper questionnaire/ 565 online questionnaire Completes</th>
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<tbody>
<tr>
<td>-</td>
<td>254 paper questionnaire/151 online questionnaire Ballston Mall Store Customers</td>
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<tr>
<td>-</td>
<td>351 paper questionnaire/204 online questionnaire Crystal City Underground Mall Store Customers</td>
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<tr>
<td>-</td>
<td>276 paper questionnaire/158 online questionnaire Rosslyn Metro Mall Store Customers</td>
</tr>
<tr>
<td>-</td>
<td>12 paper questionnaire/8 online questionnaire Shirlington Bus Stop Store Customers</td>
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<tr>
<td>-</td>
<td>115 paper questionnaire/44 online questionnaire Mobile Store Customers</td>
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<tr>
<th>Survey Population</th>
<th>Visitors to the five Commuter Stores between 3/30/09 and 4/6/09</th>
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<tr>
<th>Survey Instrument</th>
<th>Paper pre-questionnaire, then Online Follow-up</th>
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<th>Criteria for Participation</th>
<th>Store Customer</th>
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**RESEARCH NOTE:**

- A note on the scales used:
  - In the 2007 survey, as well as other ACCS surveys, a 1 to 5 (with 5 being the highest) scale was used for simplicity’s sake.
  - In 2009, the ACCS-consultant study team decided that a 0 to 10 (with 10 being the highest) scale should be used for this survey and for future surveys to better align with the Net Promoter Score (NPS) methodology created by Fred Reichheld (author of The Ultimate Question).
  - In order to compare the NPS results from the 2009 and 2007 Commuter Store surveys, both scales (1-5 and 0-10) were used in a rotating fashion (each respondent got only one type of scale, but every other respondent saw a different scale).

- While the fieldwork process was identical, please note that that resulting sample sets from a demographic perspective vary. For example, the Ballston store respondents saw an increase in Hispanics from 5% to 15%. This sample shift may or may not be reflective of the universe of Hispanic or the actual use of the Ballston store. Thus, significant changes between 2007 and 2009 findings as reported must be viewed as “potential trends” that should be watched and confirmed over time.

- Lastly, a greater degree of reporting accuracy when comparing 2007 and 2009 data sets could be realized if both data sets were weighted using common weights. As of this point in time, however, the time-related expense to do so is not worth the marginal benefit that would be realized.
**KEY FINDINGS:**

**Demographics of Commuter Store Survey Respondents:**
- Slightly more males than females responded to the survey (55% were male). The difference in the percentage of males and females decreased since 2007.
- More minority respondents were captured in the 2009 survey, especially Hispanics. Some of the increase in Hispanic visitors can be explained by an increase in first-time visitors who identify as Hispanic.
- More lower income respondents were captured in the 2009 survey than in the 2007 survey.
- Distribution across generations was similar for 2007 and 2009 with an increase only in Generation Y respondents (more of whom would have joined the workforce since 2007).
- More respondents who took the survey in 2009 were unemployed and fewer work full-time (than in 2007).
- 40% of the respondents neither lived nor worked in Arlington County, but utilized the Stores as they were passing through. This is an increase over 35% in 2007.
- Customers were transit riders, with less than 10% driving alone as their main source of commuting to work. This is consistent with the 2007 survey data. Slightly less than a third drove alone as a secondary mode of transportation. This is a decrease from 2007.

**Customer Behavior:**
- There was an increase in first-time visitors over 2007 with 23% falling into that category. Most of that increase has come from Rosslyn.
- Of those that were not first-timers, more 2009 respondents indicated that they visit the Stores once a week or more than did in 2007.
- In 2009, a question was added asking respondents who they thought operated The Commuter Stores. No one said "ACCS" or "ATP" specifically, but 34% named "Metro/WMATA."
- The majority heard about the Commuter Stores via "passing by" or referral as in 2007. There was an increase in respondents who heard about the stores from their employer.
- About three-quarters visited the Stores specifically to purchase tickets or fares and more than three-quarters who visited the Stores made a purchase. What they purchased varied significantly by Store. Those who did not purchase said they just didn't need anything, but more 2009 respondents were not able to find what they were looking for.
- Most visited their particular store because it was close to their home or work as in 2007.
- A little more than a third picked up a free schedule or brochure. This is a decrease from 2007.
- Many in 2009 mentioned that they would like more specific transit items and SmarTrip services.

**Store Experience:**
- The Commuter Store maintained its high customer satisfaction. 90% who used the 0 to 10 scale gave the store an 8, 9, or 10. 94% who used the 1 to 5 scale gave the store a 4 or 5 (down only one point from 2007). Scores did not differ significantly among the stores.
- The Net Promoter Score (based on the 0 to 10 scale used in “The Ultimate Question” by Fred Reichheld) is 79%. Using the 1 to 5 scale, the score is 83%. This is a slight increase over 78% in 2007.
Store Impact:

- 32% made a change in work travel and 28% made a change in non-work travel since first visiting The Commuter Store. The non-work change is a significant decrease from the 2007 percentage (35%).
- 39% of those who make work travel changes and 48% of those who made changes in non-work travel said that The Commuter Store influenced or assisted in the change. This question was not asked in 2007.
- 2009 Respondents indicated that they are less likely than 2007 respondents to purchase tickets at all. Slightly less than half of the respondents also purchased tickets from places other than The Commuter Store – similar to 2007 results.
- 6 in 10 customers also looked for travel information in places other than The Commuter Store although there was an increase in the number of respondents who say they don’t look for travel information at all.

Other Related Studies, Plans & Documents:

2006 – 2008 Arlington County Commuter Services (ACCS) Research and Evaluation Plan
2007 Arlington County Commuter Services (ACCS) Commuter Store Study

Available Documents:

- Questionnaires
- Data Tables
- PowerPoint Presentation Final Report

Key Words:

ACCS, Arlington County, Arlington County Commuter Services, Attitudes, Awareness, Commuter assistance services, commuters, Commuter Store, commuting, demographics, driving trips, evaluation, non-commute trips, performance measurement, satisfaction, scorecard, services, TDM, TDM Planning and Administration, The Commuter Store, The Mobile Commuter Store, Transit, Transportation Alternatives, Transportation Demand Management, Transportation Needs, Transportation Options, Transportation System