ACCS 2009
Commuter Store™ Study

July 2009

Prepared By
Table of Contents

- Study Background, Objectives, and Methodology
- Respondent Profile
- Detailed Findings:
  - Customer Behavior
  - Purchases and Information Sought
  - Customer Experience
  - The Commuter Store Staff
- Detailed Findings continued
  - Impact of the Commuter Store
  - Other Services
  - Competition
  - Customer Panel
- Strategic Implications
- Appendix
Study
Background
Objectives &
Methodology
Study Background

- This research study is a component of the ACCS Program Research and Evaluation Plan.

- The purpose of this study is four-fold:
  1. To understand how The Commuter Store™ concept is currently performing.
  2. To identify ways to improve the product and service delivery.
  3. To measure the overall impact of ACCS’ investment in the Commuter Store™.
  4. To benchmark against 2007 Commuter Store™ study.
Study Objectives

- Profile ACCS’ Commuter Stores’ current users.
- Identify what prompted store visit.
- Assess the current customer experience and satisfaction with The Commuter Stores.
- Identify store users’ needs for commuter information, fare media, and trip planning assistance services.
- Understand extent to which store is meeting consumer needs - based on attributes of “retail experience.”
- Find perceived opportunities and challenges with stores’ existing products/services.
- Identify return on investment/impact/results - did they influence or support travel change.
- Understand the above objectives from different perspectives - by audience sub-segments - e.g., repeat customers vs. first time, etc.
Methodology

• Intercept survey conducted at 5 stores
  - Fieldwork conducted March 30 - April 6, 2009
  - Interceptors approached customers as they were leaving the store
  - 1-minute, five-question intercept survey

• Interceptors asked respondents also to take a 20-to-25 minute online survey.

• $5 Starbucks gift card offered for completing online survey

• Online survey completed:
  - Survey available at in-store computer or off-site
  - Respondents were given the ability to send themselves an email and finish the survey where they left off at another location
Methodology

• 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).
2009 Response Breakdown

<table>
<thead>
<tr>
<th>Store</th>
<th># Pre-questionnaires</th>
<th># Online</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballston</td>
<td>254</td>
<td>151</td>
</tr>
<tr>
<td>Crystal City</td>
<td>351</td>
<td>204</td>
</tr>
<tr>
<td>Rosslyn</td>
<td>276</td>
<td>158</td>
</tr>
<tr>
<td>Shirlington</td>
<td>12</td>
<td>8</td>
</tr>
<tr>
<td>Mobile</td>
<td>115</td>
<td>44</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>1,008</strong></td>
<td><strong>565</strong></td>
</tr>
</tbody>
</table>

- The sample sizes for Shirlington and the Mobile Store are too small to make comparisons, but they are included in the total numbers.
## 2007 Response Breakdown

<table>
<thead>
<tr>
<th>Store</th>
<th># Pre-questionnaires</th>
<th># Online</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballston</td>
<td>199</td>
<td>171</td>
</tr>
<tr>
<td>Crystal City</td>
<td>337</td>
<td>200</td>
</tr>
<tr>
<td>Rosslyn</td>
<td>202</td>
<td>176</td>
</tr>
<tr>
<td>TOTAL</td>
<td>738</td>
<td>547</td>
</tr>
</tbody>
</table>

- 2007 data are compared with 2009 data in this presentation. When differences are significant, it is noted with a red arrow or red circle.
- Inter-store differences are also noted if applicable.
Research Note

While the fieldwork process was identical, please note 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.
Survey Respondent Profile
Who Are Commuter Store™ Patrons?

Traditional Demographics
Commuter Store Customers Tend to be Male But the Difference is Not as Pronounced as in 2007

There are no significant differences among Ballston, Crystal City, and Rosslyn in 2009. Ballston had higher male response than in 2007 and Crystal City and Rosslyn had higher female response.

2007 n = 525
2009 n = 564

Does not include those who preferred not to answer

Q26/28: Are you...
More Minority Respondents Were Captured in the 2009 Survey

Significantly more whites took the survey at Crystal City and more Hispanics took the survey at Ballston in 2009.

Q24/26: Which one of the following best describes your racial background?

- **2007 n = 489**
- **2009 n = 520**

Does not include those who said “don’t know” or preferred not to answer

- **White, non-Hispanic**
  - 2007: 49%
  - 2009: 62%

- **Black**
  - 2007: 24%
  - 2009: 23%

- **Hispanic**
  - 2007: 5%
  - 2009: 15%

- **Asian**
  - 2007: 6%
  - 2009: 8%

- **Other**
  - 2007: 4%
  - 2009: 5%

Of those who describe themselves as Hispanic - 12 of the 76 (16%) were first time visitors, 29 (38%) only started coming to the Stores in the past year, 22 (29%) first visited the stores in the past 1 to 4 years. This may account for some of the increase in Hispanic visitors.
Ballston: More Hispanics Took the Survey in 2009

Q24/26: Which one of the following best describes your racial background?

Ballston
2007 n = 157
2009 n = 144

Does not include those who said “don’t know” or preferred not to answer.
Rosslyn: Fewer Whites Took the Survey in 2009

Q24/26: Which one of the following best describes your racial background?

- White, non-Hispanic: 69% (2007), 53% (2009)
- Black: 26% (2007), 21% (2009)
- Hispanic: 4% (2007), 6% (2009)
- Asian: 4% (2007), 9% (2009)
- Other: 3% (2007), 6% (2009)

Rosslyn 2007 n = 157
2009 n = 141

Does not include those who said “don’t know” or preferred not to answer
More Lower Income Respondents Were Captured in the 2009 Survey

Q25/27: Which category best represents your household’s total annual income?

There are significant differences from 2007 to 2009 among Ballston and Crystal City respondents.

2007 n = 450
2009 n = 442

Does not include those who said “don’t know” or preferred not to answer.
Ballston:
More Lower Income Respondents Took the Survey in 2009

Q25/27: Which category best represents your household's total annual income?
Crystal City: Fewer Middle Income Respondents Took the Survey in 2009

- Crystal City 2007 n = 163
- 2009 n = 168

Does not include those who said "don’t know" or preferred not to answer

Q25/27: Which category best represents your household’s total annual income?
Respondents’ Generational Distribution Across 2007-2009 Sample Is Similar

There are significant differences from 2007 to 2009 among Ballston and Crystal City in the Gen Y category.

Q23/25: Age of respondent - based on What year were you born?

2007 n = 541
2009 n = 548

Does not include those who preferred not to answer
Fewer Full-time Respondents Took the Survey in 2009

Economy Changes May Attribute to Differences in Employment Levels from 2007 to 2009

Q20/22: What is your current employment status?

2007 n = 548
2009 n = 565

Does not include those who said “don’t know” or preferred not to answer
Where Do Commuter Store Patrons Live & Work?
Respondent Zip Code Analysis
The Percentage of Respondents Who Neither Live nor Work in Arlington Has Increased Slightly

More than a third (40%) neither live nor work in Arlington County

- Live but don’t work in Arlington: 6% in 2007, 16% in 2009
- Work but don’t live in Arlington: 50% in 2007, 34% in 2009
- Live and work in Arlington: 9% in 2007, 11% in 2009
- Neither live nor work in Arlington: 35% in 2007, 40% in 2009

Q19/20: What is your home zip code?
Q22/24: What is your work zip code?

2007 n = 468
2009 n = 553

Does not include those who preferred not to answer

There are significant differences from 2007 to 2009 among Ballston and Crystal City respondents in all categories except “live and work.” There are significant differences among Rosslyn respondents for those who “work not live” and “neither live nor work” in Arlington.
Home Zip Codes

The map above illustrates the distribution of home zip codes in the specified region. The color coding indicates different ranges of zip code values, with each color representing a specific range (0 to 7, 8 to 15, 16 to 23, 24 to 31, 32 to 40). This visual representation helps in understanding the concentration and dispersion of zip codes across the area.
Work Zip Codes
As In 2007, Almost Half of Arlington Resident Respondents Have Lived in Arlington for More Than 10 Years

Q19A/21: How long have you lived in Arlington County?

2007 n = 110
2009 n = 139
How Do Commuter Store Patrons Commute?

Self-reported Mode Use
Mode Use of Respondents Did Not Change Significantly from 2007 to 2009

Q21/23: What type of transportation do you typically use to get to work?  
ASKED ONLY OF THOSE WHO INDICATED THEY ARE EMPLOYED

2007 n = 470  
2009 n = 485

Note: 22% of those who drive alone were first time visitors. (28% in 2007)

2009 Ballston respondents are significantly more likely to typically ride the bus than 2007 Ballston respondents.
Different Stores Service Different Types of Commuters

Q21: What type of transportation do you typically use to get to work?
ASKED ONLY OF THOSE WHO INDICATED THEY ARE EMPLOYED

There were a few tourist respondents in Rosslyn accounting for some of the “Other” responses.

2009
Ballston
n = 107
Crystal City
n = 183
Rosslyn
n = 132

All three are significantly different
2009 Respondents Are Less Likely to Drive Alone as a Secondary Mode than 2007 Respondents

61% of 2007 respondents and 64% of 2009 respondents also use another type of transportation to get to work (not a significant difference).

2007 n = 311
2009 n = 288

Q21A/23A: Do you ever use another type of transportation to get to work, other than the one you just indicated?
Q21B/23B: What other types of transportation do you use? MULTIPLE RESPONSES ACCEPTED
In 2007, 55% of Ballston Customers, 62% of Crystal City Customers, and 47% of Rosslyn Customers use secondary transportation less than once a week. The two studies are not directly comparable on this question because the “three or more days a week” option was added in 2009.

Secondary Modes May Often Be Combined with Primary Modes as Many Use them Three or More Days a Week

Q21C: How often do you typically use any of these other types of transportation to get to work?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Three or more days per week</td>
<td>72%</td>
<td>66%</td>
<td></td>
</tr>
<tr>
<td>Two days per week</td>
<td>10%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>One day per week</td>
<td>8%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>A few times per month</td>
<td>15%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Once per month</td>
<td>10%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>A few times per year</td>
<td>11%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Only in emergencies</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

2009
Ballston n = 58
Crystal City n = 116
Rosslyn n = 82
# Comparison of Demographics

<table>
<thead>
<tr>
<th></th>
<th>Ballston</th>
<th>2009 Crystal City</th>
<th>Rosslyn</th>
<th>2007</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Male</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>50</td>
<td>59</td>
<td>57</td>
<td>62</td>
<td>55</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% White</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>31</td>
<td>59</td>
<td>49</td>
<td>55</td>
<td>46</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean Income (in thousands)</td>
<td>69</td>
<td>109</td>
<td>92</td>
<td>96</td>
<td>92</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean Age</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>45</td>
<td>48</td>
<td>44</td>
<td>47</td>
<td>46</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Employed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>71</td>
<td>90</td>
<td>85</td>
<td>88</td>
<td>83</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Live but don't work in AC</td>
<td>39</td>
<td>6</td>
<td>7</td>
<td>6</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Work but don't live in AC</td>
<td>20</td>
<td>51</td>
<td>31</td>
<td>50</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Live and work in AC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>22</td>
<td>5</td>
<td>7</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Don't live or work in AC</td>
<td>20</td>
<td>38</td>
<td>56</td>
<td>35</td>
<td>40</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Typical Travel Mode - Drive Alone</td>
<td>7</td>
<td>14</td>
<td>5</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>

Southeastern Institute of Research
### Comparison of Demographics

<table>
<thead>
<tr>
<th></th>
<th>Frequent Newbies</th>
<th>Frequent Veterans</th>
<th>Occasional Newbies*</th>
<th>Occasional Veterans</th>
<th>First Timers</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Male</td>
<td>56</td>
<td>61</td>
<td>48</td>
<td>52</td>
<td>49</td>
</tr>
<tr>
<td>% White</td>
<td>38</td>
<td>49</td>
<td>46</td>
<td>53</td>
<td>49</td>
</tr>
<tr>
<td>Mean Income (in thousands)</td>
<td>91</td>
<td>97</td>
<td>82</td>
<td>101</td>
<td>89</td>
</tr>
<tr>
<td>Mean Age</td>
<td>42</td>
<td>50</td>
<td>44</td>
<td>51</td>
<td>40</td>
</tr>
<tr>
<td>% Employed</td>
<td>91</td>
<td>88</td>
<td>77</td>
<td>76</td>
<td>72</td>
</tr>
<tr>
<td>% Live but don't work in AC</td>
<td>9</td>
<td>17</td>
<td>21</td>
<td>16</td>
<td>15</td>
</tr>
<tr>
<td>% Work but don't live in AC</td>
<td>30</td>
<td>45</td>
<td>31</td>
<td>31</td>
<td>19</td>
</tr>
<tr>
<td>% Live and work in AC</td>
<td>13</td>
<td>7</td>
<td>28</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>% Don't live or work in AC</td>
<td>48</td>
<td>30</td>
<td>21</td>
<td>41</td>
<td>56</td>
</tr>
<tr>
<td>% Typical Travel Mode - Drive Alone</td>
<td>3</td>
<td>5</td>
<td>13</td>
<td>4</td>
<td>22</td>
</tr>
</tbody>
</table>

*CAUTION SMALL SAMPLE SIZE*
## Comparison of Demographics

<table>
<thead>
<tr>
<th></th>
<th>Arlington Resident/Employee</th>
<th>Non Arlington</th>
<th>Made Change</th>
<th>No Change</th>
<th>Shopper</th>
<th>Loyalist</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Male</td>
<td>55</td>
<td>54</td>
<td>57</td>
<td>53</td>
<td>55</td>
<td>54</td>
</tr>
<tr>
<td>% White</td>
<td>46</td>
<td>46</td>
<td>51 (Circled)</td>
<td>40</td>
<td>57</td>
<td>52</td>
</tr>
<tr>
<td>Mean Income (in thousands)</td>
<td>89</td>
<td>97</td>
<td>90 (Circled)</td>
<td>95</td>
<td>91</td>
<td>90</td>
</tr>
<tr>
<td>Mean Age</td>
<td>47</td>
<td>45</td>
<td>44</td>
<td>49</td>
<td>46</td>
<td>49</td>
</tr>
<tr>
<td>% Employed</td>
<td>84</td>
<td>82</td>
<td>81</td>
<td>86</td>
<td>87</td>
<td>82</td>
</tr>
<tr>
<td>% Live but don't work in AC</td>
<td>26</td>
<td>0</td>
<td>13</td>
<td>18</td>
<td>13</td>
<td>22</td>
</tr>
<tr>
<td>% Work but don't live in AC</td>
<td>56</td>
<td>0</td>
<td>37</td>
<td>34</td>
<td>34</td>
<td>37</td>
</tr>
<tr>
<td>% Live and work in AC</td>
<td>18</td>
<td>0</td>
<td>11</td>
<td>10</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>% Don't live or work in AC</td>
<td>0</td>
<td>100</td>
<td>39</td>
<td>38</td>
<td>41</td>
<td>32</td>
</tr>
<tr>
<td>% Typical Travel Mode -</td>
<td>9</td>
<td>8</td>
<td>10</td>
<td>7</td>
<td>11</td>
<td>4</td>
</tr>
<tr>
<td>Drive Alone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Arlington Resident/Employee** = Respondent lives or works (or both) in Arlington

**Non Arlington** = Does not live or work in Arlington

**Made Change** = Respondent made either a change in work mode or a change in non-work travel since starting to go to the Commuter Store

**No Change** = Respondent did not make any changes; Does not include first timers.

**Shopper** = Respondent uses multiple sources to purchase tickets

**Loyalist** = Respondent only purchases tickets from The Commuter Store; Does not include those who don’t make ticket purchases.
Detailed Findings
Customer Behavior
How Engaged Are Commuter Store Patrons?

Self-reported store visitation
The 2009 Survey Captured More First-Time Visitors and Fewer Repeat Visitors Who Only Go to One Store

PQ3: Is this your first visit to any Commuter Store?

2007 n = 544
2009 n = 995

Younger generations are more likely to be first-time visitors.
Ballston:
The Incidence of Respondents Who Had Been to Commuter Stores Other than Ballston Was Higher in 2009

PQ3: Is this your first visit to any Commuter Store?

Ballston
2007 n = 169
2009 n = 245
**Crystal City:**
The Incidence of Respondents Who Only Visited That Store Went Down and That of Those Who Visited Multiple Stores Went Up

PQ3: Is this your first visit to any Commuter Store?

**Crystal City**
2007 n = 200
2009 n = 350
Rosslyn:
There Was an Increase in First-timers as the Percentage of Respondents Visiting Multiple Stores Decreased

PQ3: Is this your first visit to any Commuter Store?

Rosslyn
2007 n = 175
2009 n = 276
More 2009 Respondents Visited the Stores Once a Week or More

- 86% of Ballston Customers,
- 80% of Crystal City Customers,
- and 71% of Rosslyn Customers visit at least once a month.

PQ4/Q9: How often do you visit this and/or any other Commuter Store in Arlington County?

- 2007 n = 480
- 2009 n = 752

Generation Y and the Silent Generation are more likely to visit once a week or more than Generation X or Baby Boomers.

Those who made a purchase are more likely to visit once a month.

Does not include those visiting for the first time.
Ballston:
2009 Respondents Are More Likely to Visit Once a Week or More and Less Likely to Visit Once a Month Than Those in 2007

77% of 2007 and 86% of 2009 Ballston respondents visit at least once a month.

PQ4/Q9: How often do you visit this and/or any other Commuter Store in Arlington County?

Ballston
2007 n = 171
2009 n = 189
Does not include those visiting for the first time.
Rosslyn:
2009 Respondents Are More Likely to Visit Just Once a Year Than Those in 2007

76% of 2007 and 71% of 2009 Rosslyn respondents visit at least once a month.

PQ4/Q9: How often do you visit this and/or any other Commuter Store in Arlington County?

Rosslyn
2007 n = 171
2009 n = 189

Does not include those visiting for the first time.
There Are Few Changes Between the 2007 and 2009 Respondents in Terms of When They First Visited

The Ballston Store opened in June of 1989.
The Rosslyn Store Opened in December of 1994.

There are a few significant among the stores between 2007 and 2009, but the differences between those who first visited a year prior are not significant.

2007 n = 550
2009 n = 978
Note: Sample does not include some who didn’t answer the question which is why the % of first time visitors differs from prior slides.

53% of Ballston Customers, 59% of Crystal City Customers, and 31% of Rosslyn Customers had their first visit prior to one year ago.

PQ5/Q10: When did you first visit The Commuter Store?
More Believe Metro Owns the Stores Than Arlington; No One Said ACCS or ATP Specifically

Q2: To the best of your knowledge, what organization operates The Commuter Stores?

2009 n = 565
“Just Passing By” Is the Number One Source of Learning About the Commuter Store

Q1: Where did you first hear about The Commuter Store?

2007 n = 549
2009 n = 568

2009 Crystal City Respondents are more likely than 2007 respondents at that store to say “Employer,” but less likely to say “Other.”

In 2009, Ballston respondents were more likely to say “friend/family/co-worker.” Crystal City respondents were more likely than Ballston to say “employer” but less likely than Ballston to say “advertisement.”
Different Segments Learned about The Commuter Store from Different Sources

- Generation Y is more likely than Generation X and Baby Boomers to have first heard about The Commuter Store from friends, family, or co-workers.
- Generation X is the most likely to have first heard about The Commuter Store from a Web site.
- Older Generations are more likely to say they first heard about The Commuter Store from an advertisement.
- Those who made a purchase are less likely than those who did not to have first heard about The Commuter Store by passing by, but more likely to have heard about it first from a Web site.
Those Who Come Occasionally Are More Likely to Have Found Out About the Stores By Passing By

Q1: Where did you first hear about The Commuter Store?

- **Passing by**: 52% of Occasional Newbies, 44% of Occasional Veterans, 40% of Frequent Newbies, 33% of Frequent Veterans, 26% of First Timers.
- **Friend/Family/Co-Worker**: 28% of Occasional Newbies, 27% of Occasional Veterans, 23% of Frequent Newbies, 22% of Frequent Veterans, 13% of First Timers.
- **Employer**: 10% of Occasional Newbies, 7% of Occasional Veterans, 6% of Frequent Newbies, 3% of Frequent Veterans, 2% of First Timers.
- **Web site**: 12% of Occasional Newbies, 10% of Occasional Veterans, 8% of Frequent Newbies, 8% of Frequent Veterans, 7% of First Timers.
- **Advertisement**: 7% of Occasional Newbies, 6% of Occasional Veterans, 5% of Frequent Newbies, 5% of Frequent Veterans, 4% of First Timers.
- **Brochure**: 3% of Occasional Newbies, 3% of Occasional Veterans, 8% of Frequent Newbies, 8% of Frequent Veterans, 6% of First Timers.
- **Other**: 17% of Occasional Newbies, 10% of Occasional Veterans, 10% of Frequent Newbies, 10% of Frequent Veterans, 6% of First Timers.
Those Who Live and Work in Arlington Are Less Likely to Have Heard About the Stores From Their Employer or a Web Site

<table>
<thead>
<tr>
<th>Source</th>
<th>Arlington Resident or Employee</th>
<th>Non Arlington</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passing by</td>
<td>39%</td>
<td>35%</td>
</tr>
<tr>
<td>Friend/Family/Co-Worker</td>
<td>26%</td>
<td>19%</td>
</tr>
<tr>
<td>Employer</td>
<td>12%</td>
<td>18%</td>
</tr>
<tr>
<td>Web site</td>
<td>8%</td>
<td>18%</td>
</tr>
<tr>
<td>Advertisement</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Brochure</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Q1: Where did you first hear about The Commuter Store?
Loyalists Are More Likely to Have Heard About the Stores From Friends and Family and Less Likely to Have Just Been Passing By

Q1: Where did you first hear about The Commuter Store?

Shopper
n = 321

Loyalist
n = 216
The Majority of Customers Go to the Commuter Store Specifically to Purchase Fares

PQ1: Why did you come into The Commuter Store today? MULTIPLE RESPONSES ACCEPTED

2007 n = 547
2009 n = 1,004

- Needed ticket media: 79% (2007), 75% (2009)
- Needed information: 12% (2007), 11% (2009)
- Needed schedule/map: 7% (2007), 7% (2009)
- Came in to kill time: 4% (2007), 4% (2009)
- Came in to check it out: 1% (2007), 2% (2009)
- Want to improve commute: 1% (2007), 0% (2009)
- Other: 10% (2007), 14% (2009)
Respondents Are More Likely to Come to Crystal City to Purchase Fare Media and Less Likely to Kill Time There

Q1: Why did you come into The Commuter Store today? MULTIPLE RESPONSES ACCEPTED

- Needed ticket media
  - Ballston: 70%
  - Crystal City: 76%
  - Rosslyn: 82%
- Needed information
  - Ballston: 8%
  - Crystal City: 10%
- Needed schedule/map
  - Ballston: 5%
  - Crystal City: 8%
- Came in to kill time
  - Ballston: 3%
  - Crystal City: 5%
  - Rosslyn: 1%
- Came in to check it out
  - Ballston: 4%
  - Crystal City: 0%
  - Rosslyn: 0%
- Want to improve commute
  - Ballston: 0%
  - Crystal City: 1%
  - Rosslyn: 1%
- Other
  - Ballston: 15%
  - Crystal City: 12%
  - Rosslyn: 17%

Ballston significantly different from Rosslyn
Ballston:
2009 Respondents Are Less Likely to Have Come to the Store to Purchase Fares Than Those in 2007

PQ1: Why did you come into The Commuter Store today? MULTIPLE RESPONSES ACCEPTED

Ballston
2007 n = 171
2009 n = 253
Crystal City: 2009 Respondents Are More Likely to Have Come to the Store to Get a Map Than Those in 2007

Ballston
2007 n = 200
2009 n = 350

PQ1: Why did you come into The Commuter Store today? MULTIPLE RESPONSES ACCEPTED
Most Choose Stores Based on Location and Convenience

Generation Y is more likely than older generations to choose the store based on a referral.

Q3/2: What made you select this particular Store? MULTIPLE RESPONSES

- Near my work: 65% (2007), 55% (2009)
- Near my home: 17% (2007), 12% (2009)
- Only one I know of: 10% (2007), 12% (2009)
- Past experience: 9% (2007), 7% (2009)
- Referral: 7% (2007), 7% (2009)
- Employer referral: 3% (2007), 4% (2009)
- Other: 7% (2007), 12% (2009)

2007 n = 550
2009 n = 566
Crystal City is Closer to Shoppers’ Work Locations and Ballston is Closer to Shoppers’ Homes

<table>
<thead>
<tr>
<th>Reason</th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Near my work</td>
<td>41%</td>
<td>52%</td>
<td>68%</td>
</tr>
<tr>
<td>Near my home</td>
<td>38%</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Only one I know of</td>
<td>14%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Past experience</td>
<td>11%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Referral</td>
<td>10%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Employer referral</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
<td>10%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Q3/2: What made you select this particular Store? MULTIPLE RESPONSES

ACCEPTED

2009
- Ballston: n = 149
- Crystal City: n = 204
- Rosslyn: n = 158

Ballston significantly different from Rosslyn
Ballston significantly different from Crystal City
Ballston:
2009 Respondents Are Less Likely to Go to Ballston Because it is the Only One They Know

Q3/2: What made you select this particular Store? MULTIPLE RESPONSES

- Near my work: 46% (2007), 41% (2009)
- Near my home: 38% (2007), 29% (2009)
- Only one I know of: 15% (2007), 7% (2009)
- Past experience: 8% (2007), 5% (2009)
- Referral: 8% (2007), 10% (2009)
- Employer referral: 3% (2007), 3% (2009)
- Other: 6% (2007), 9% (2009)

Ballston
2007 n = 171
2009 n = 149
Crystal City:
2009 Respondents Are More Likely to Go to Crystal City Because it is the Only One They Know; The Percentage of Those Who Chose That Store Because It is Close to Their Home Has Also Increased

Q3/2:  What made you select this particular Store?  MULTIPLE RESPONSES

<table>
<thead>
<tr>
<th>Reason</th>
<th>2007</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Near my work</td>
<td>81%</td>
<td>68%</td>
</tr>
<tr>
<td>Near my home</td>
<td>1%</td>
<td>8%</td>
</tr>
<tr>
<td>Only one I know of</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Past experience</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>Referral</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Employer referral</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Crystal City
2007 n = 200
2009 n = 204
Rosslyn:
2009 Respondents Are More Likely to Go to Rosslyn Because it is the Only One They Know

Q3/2: What made you select this particular Store? MULTIPLE RESPONSES

- Near my work: 64% (2009), 52% (2007)
- Near my home: 8% (2009), 9% (2007)
- Only one I know of: 15% (2009), 8% (2007)
- Past experience: 10% (2009), 1% (2007)
- Referral: 7% (2009), 6% (2007)
- Employer referral: 3% (2009), 4% (2007)
- Other: 9% (2009), 17% (2007)
Purchases & Information Sought
In Both Years Surveyed, 8 in 10 Made a Purchase

- 2007, 80% of purchasers made a purchase.
- 2009, 79% of purchasers made a purchase.

There are no significant differences among the stores for 2009 or between 2007 and 2009.

16% of purchasers received a discounted fare for age or disability.

Q8/PQ2: Did you make a purchase?
Q8B: the fare that you purchased discounted for age (Senior or Youth) or a disability? (NOT ASKED IN 2007)

2007 n = 547
2009 n = 568

Boomers are the least likely to purchase SmarTrip cards.
Ballston Customers Tend to Purchase Metro Farecards or SmarTrip Cards

Q8A: What did you purchase? MULTIPLE RESPONSES ACCEPTED

- Other Metro farecard: 54%
- SmarTrip transaction: 36%
- Transit Link Card (TLC): 6%
- ART Tokens: 3%
- Other VRE pass: 2%
- Other MARC pass: 2%
- DASH Monthly Pass: 1%
- Red Top Cab Coupons: 1%
- Other: 6%

2007 data is not directly comparable because the questions were asked differently. However, 15% purchased a SmarTrip card.

Other includes items such as “cashed computer checks,” disability farecards, and maps.

Ballston 2009 n = 115
Crystal City Customers Tend to Purchase VRE Passes

2007 data is not directly comparable because the questions were asked differently. However, 49% purchased a VRE fare, and 5% purchased a SmarTrip card.

Other includes items such as MARC/Metro farecards and Senior passes.

Q8A: What did you purchase? MULTIPLE RESPONSES ACCEPTED

- Other VRE pass: 53%
- SmarTrip transaction: 19%
- Other Metro farecard: 12%
- Other MARC pass: 8%
- Transit Link Card (TLC): 6%
- STAR Coupon Books: 1%
- Super Senior Taxi Coupons: 1%
- Other: 9%
Rosslyn Customers Tend to Purchase SmarTrip Cards

2007 data is not directly comparable because the questions were asked differently. However, 40% purchased a SmarTrip card, 25% purchased a Transit Link, and 10% purchased a MARC fare.

Other includes items such as Georgetown Bus Commuter passes.

Q8A: What did you purchase? MULTIPLE RESPONSES ACCEPTED

- SmarTrip transaction: 40%
- Transit Link Card (TLC): 25%
- Other Metro farecard: 21%
- Other MARC pass: 18%
- Other VRE pass: 2%
- Other: 2%
Mobile Store Customers Tend to Purchase Metro or VRE Fares

Q8A: What did you purchase? MULTIPLE RESPONSES ACCEPTED

- Other Metro farecard: 13
- Other VRE pass: 9
- SmarTrip transaction: 4
- Other MARC pass: 4
- Transit Link Card (TLC): 3
- DASH Monthly Pass: 3

Actual numbers shown due to small sample size. Total is 37 because one respondent bought 2 items.
Those Who Come Frequently Are More Likely to Make a Purchase

Made a purchase

Q8/PQ2: Did you make a purchase?
Loyalists Were More Likely to Make a Purchase
Those Who Did Not Make a Change Were More Likely to Make a Purchase

Q8/PQ2: Did you make a purchase?

- **Arlington Resident or Employee**
  - n = 333

- **Does not live or work in Arlington**
  - n = 220

- **Made work or non-work mode change**
  - n = 302

- **Did not make change**
  - n = 266

- **Shopper**
  - n = 240

- **Loyalist**
  - n = 201

**Made a purchase**

- **Arlington Resident/Employee**
  - 74%

- **Non Arlington**
  - 85%

- **Made change**
  - 70%

- **No change**
  - 91%
More Respondents in 2009 Were Not Able to Find What They Were Looking For

Q8C/PQ2A: Why did you not make a purchase?

Items customers didn’t find: MTA tickets, a refundable SmarTrip (for a visitor), reduced fare VRE, and other unspecified tickets. All respondents were at Rosslyn with the exception of the person looking for the MTA tickets at the Mobile Store.

2007 n = 105
2009 n = 107
Ballston Customer Comments
What They Were Looking For But Could Not Find

16 Comments Total

“Bus Routes for Montgomery County”
(1 First-time Visitor, 1 Experienced)

“Info from Dale City to Arlington”

“Routes from Rosslyn to Georgetown.”

“MARC Tickets”

“[Found] more than I thought, found out I could load SmarTrip here in the store.”

“More weekly flash passes should be sold elsewhere. Smartrip steals money!”

“Yellow senior cards don't give transfers.”

“SmarTrip steals money on bus transfers.”
(3 similar comments - one from a First-time Visitor)

“Some of the bus routes. Montgomery County routes. Ride vs. Metro.”

“Store was hard to find, info on the directory would be helpful.”
( First-time Visitor)

PQ2: Was there anything you were looking for that you did not find?
Crystal City Customer Comments
What They Were Looking For But Could Not Find
29 Comments Total

“23 schedule was out.”
(2 comments like this)

“28AB Bus Schedule.”

“Ability to transfer funds from bad card to good card. I had to buy a new card.”
(6 comments like this, some from First-time Visitors)

“Large Print Guide”

“Maryland Triplink Card”

“Southwest Chief info. Washington - Chicago; give intel on that.”

PQ4: Was there anything you were looking for that you did not find?
Rosslyn Customer Comments
What They Were Looking For But Could Not Find
25 Comments Total

“Ability to get VRE monthly pass using SmartBenefits today + have future passes mailed to my home. Appears you can do mail through CmuterDirect but not pick up ticket on the 1st month, then mail future.” *(First-time Visitor)*

“Could not refund TLC without my receipt. Could not validate off my credit card used.”

“Great store, great service, greets by name.”

“Location closer to Baltimore.”

“Long distance bus”

“Metro map that uses (street realistic signs)”

“Mike is very helpful.”

“Replacements were not available here.” *(First-time Visitor)*

“Schedules reflecting the changes that took effect yesterday (29 March) throughout the Metrobus system.”

“VRE 10 trip passes”

“Wanted to x-change smart benefits voucher for VRE tickets.”

PQ4: Was there anything you were looking for that you did not find?
Mobile Store Customer Comments
What They Were Looking For But Could Not Find
10 Comments Total

“Bus Schedule 24P but don’t have.”
“Info on local events.”
“Info on the 905 bus.” (First-time Visitor)
“No, more than needed.” (First-time Visitor)

Shirlington Customer Comments
What They Were Looking For But Could Not Find
1 Comment Total

“How’s the weather?”

“How’s the weather?”

PQ4: Was there anything you were looking for that you did not find?
Fewer Respondents Took a Free Schedule or Brochure in 2009

Q13: Did you pick up a free schedule or brochure?

2007 n = 550
2009 n = 569
Fewer Respondents Took a Free Schedule or Brochure in 2009 in All Stores

Q13: Did you pick up a free schedule or brochure?

2007
Ballston
n = 171
Crystal City
n = 200
Rosslyn
n = 176

2009
Ballston
n = 151
Crystal City
n = 204
Rosslyn
n = 158
Occasional Veterans and First Timers Were The Most Likely to Pick Up a Schedule on Their Most Recent Visit

Q13: Did you pick up a free schedule or brochure?
Those Who Made a Change Were More Likely to Pick up a Schedule or Brochure

- **Shopper** = Respondent uses multiple sources to purchase tickets
- **Loyalist** = Respondent only purchases tickets from The Commuter Store

**Arlington Resident or Employee**  
$n = 333$

**Does not live or work in Arlington**  
$n = 221$

**Made work or non-work mode change**  
$n = 302$

**Did not make change**  
$n = 267$

**Shopper**  
$n = 240$

**Loyalist**  
$n = 201$

**Q13**: Did you pick up a free schedule or brochure?
Respondents in 2007 and 2009 Were Looking for Similar Types of Schedules, Maps, and Brochures

Q13A: What did you pick up? MULTIPLE RESPONSES ACCEPTED

Car-Free Diet, of course, wasn’t available in 2007

2007 n = 223
2009 n = 181
Many Mentioned They Would Like More Specific Transit Items and SmarTrip Services

Q14: Please list any local travel information products or travel services that you need or want that are not offered at the Store.  MULTIPLE RESPONSES ACCEPTED

- Commuter bus, MTA, and other bus items: 18%
- SmarTrip Services: 14%
- Tourism/local interests: 8%
- Other travel (incl air, AMTRAK, Greyhound etc): 7%
- Other Store Locations: 4%
- Other: 49%

2009 n = 73
Those who said none, nothing, don’t know, etc. were excluded as were those who did not answer the question.
Customer Comments
What Travel Information They Were Looking For But Could Not Find

“There is none. This place is excellent. Angelika personally ordered the relatively unpopular VRE Ten trip tickets from zones 1-3 so I’d have them when I came by.” (Mobile)

“A detailed map(s) of the greater Washington area with metro, roads, railroads, etc. that I could pin-up on my cubicle wall for quick reference for alternative transportation methods, approximate distance, etc. I would be will to pay for it.” (Crystal City)

“A machine that will download smart benefits onto a smartrip card.” (Rosslyn)

Q14: Please list any local travel information products or travel services that you need or want that are not offered at the Store.
Customer Comments
What Travel Information They Were Looking For But Could Not Find

“Ability to exchange non-working smartrip card.” (Ballston)

“Ability to transfer funds and register smart trip card.” (Crystal City)

“Ability to transfer Smartbenefit vouchers to Metro card.” (Rosslyn)

“It would be nice if the store sold lanyards and smarttrip card holders.” (Rosslyn)

“Long distance commuting - trains and busses - rosslyn to richmond, va. and rosslyn to new yok city.” (Crystal City)

Q14: Please list any local travel information products or travel services that you need or want that are not offered at the Store.
Customer Experience
Ballston:
2009 Ratings Are Up Across the Board, But Not Significantly With the Exception of “Sound”

Sample size varies as it does not include those who said “don’t know.”
**Ballston:**
The 0 to 10 Scale Yields Similar Results
Except “Easy to Find Location”
and “Convenient Hours” Are Slightly Lower

<table>
<thead>
<tr>
<th>Statement</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy to find way around</td>
<td>6%</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>81%</td>
</tr>
<tr>
<td>Right sound</td>
<td>6%</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>80%</td>
</tr>
<tr>
<td>Convenient location</td>
<td>6%</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>76%</td>
</tr>
<tr>
<td>Pleasant to shop</td>
<td>7%</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>77%</td>
</tr>
<tr>
<td>Right lighting</td>
<td>7%</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>71%</td>
</tr>
<tr>
<td>Easy to find location</td>
<td>7%</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>63%</td>
</tr>
<tr>
<td>Convenient hours</td>
<td>7%</td>
<td>6%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>65%</td>
</tr>
</tbody>
</table>

**Ballston**
2009 n = 70

Sample size varies as it does not include those who said “don’t know.”

Q11a-g: Do you agree with the following statements regarding this particular Commuter Store?
Crystal City:
2009 Ratings of “Easy to Find Location” Decreased Significantly But Other Ratings Are Similar

Q11a-g: Do you agree with the following statements regarding this particular Commuter Store?

Crystal City
2007 n = 200
2009 n = 105

Sample size varies as it does not include those who said “don’t know.”
Crystal City:
The 0 to 10 Scale Yields Just Slightly Lower Results in Most Cases

<table>
<thead>
<tr>
<th>Feature</th>
<th>8</th>
<th>9</th>
<th>10 - Completely agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy to find way around</td>
<td>8%</td>
<td>18%</td>
<td>66%</td>
</tr>
<tr>
<td>Right lighting</td>
<td>11%</td>
<td>16%</td>
<td>63%</td>
</tr>
<tr>
<td>Convenient location</td>
<td>6%</td>
<td>13%</td>
<td>69%</td>
</tr>
<tr>
<td>Pleasant to shop</td>
<td>12%</td>
<td>13%</td>
<td>59%</td>
</tr>
<tr>
<td>Right sound</td>
<td>15%</td>
<td>15%</td>
<td>54%</td>
</tr>
<tr>
<td>Convenient hours</td>
<td>9%</td>
<td>15%</td>
<td>57%</td>
</tr>
<tr>
<td>Easy to find location</td>
<td>11%</td>
<td>12%</td>
<td>57%</td>
</tr>
</tbody>
</table>

Q11a-g: Do you agree with the following statements regarding this particular Commuter Store?

Crystal City 2009 n = 98
Sample size varies as it does not include those who said “don’t know.”

5-point Scale top 2 box:
Easy to find way around - 94%
Right lighting - 93%
Convenient location - 90%
Pleasant to shop - 88%
Right sound - 92%
Convenient hours - 82%
Easy to find location - 85%
Rosslyn:
2009 Ratings Are Similar to 2007 Ratings

Q11a-g: Do you agree with the following statements regarding this particular Commuter Store?

Rosslyn
2007 n = 176
2009 n = 67

Sample size varies as it does not include those who said “don’t know.”
**Rosslyn:**
The 0 to 10 Scale Yields Similar Results

Q11a-g: Do you agree with the following statements regarding this particular Commuter Store?

- **Pleasant to shop:** 7% 11% 75% 93%
- **Easy to find way around:** 8% 14% 70% 92%
- **Right sound:** 11% 10% 70% 91%
- **Right lighting:** 13% 16% 61% 90%
- **Convenient location:** 8% 15% 65% 88%
- **Convenient hours:** 15% 14% 55% 84%
- **Easy to find location:** 8% 13% 61% 82%

5-point Scale top 2 box:
- Pleasant to shop - 88%
- Easy to find way around - 91%
- Right sound - 91%
- Right lighting - 85%
- Convenient location - 84%
- Convenient hours - 80%
- Easy to find location -85%

Rosslyn 2009 n = 90
Sample size varies as it does not include those who said “don’t know.”
Mobile:
The Majority Agree with These Statements

Q11a-g: Do you agree with the following statements regarding this particular Commuter Store?

Mobile
n = 17

Actual numbers shown due to small sample size.
The Majority Agree with These Statements

Q11a-g: Do you agree with the following statements regarding this particular Commuter Store?

- Easy to find way around: 5 (4), 20 (5 - Strongly agree)
- Right lighting: 5 (4), 19 (5 - Strongly agree)
- Convenient location: 3 (4), 20 (5 - Strongly agree)
- Pleasant to shop: 4 (4), 19 (5 - Strongly agree)
- Easy to find location: 5 (4), 18 (5 - Strongly agree)
- Right sound: 5 (4), 18 (5 - Strongly agree)
- Convenient hours: 7 (4), 13 (5 - Strongly agree)

Mobile: 27 respondents

Actual numbers shown due to small sample size.
A Few Comments

“Continue the good service, and keep this store open.” (Rosslyn)

“Darlene has been a great help and is willing to answer any question I have.” (Ballston)

“everything was good ... dee made my day” (Rosslyn)

“I have been to several of the commuter stores -- they are much more convenient to go to instead of going to metro center to get tickets, tokens..... Darlene at your Ballston is very well informed on multiple transportation systems and can find inform” (Ballston)

“Dee was absolutely amazing....very personable, very wonderful!” (Rosslyn)

“It is the only store in the area that will allow me to exchange my commuter checks for metro passes. For our office, this is EXTREMELY convenient and helps us decrease our carbon footprint by giving incentives to use public transportation.” (Rosslyn)

Q12: Why did you give that rating?
A Few Comments

“Customer service reps are not particularly friendly, and the lighting is harsh & inconsistent.” (Crystal City - 2/5 Rating)

“Typically the employees are not very friendly.” (Crystal City - 2/5 Rating)

“We don't need, or want, a TV on, filling the world with noise everywhere we go. When I am out and about and may need to wait in line, I always have something with me to read - the TV noise is very annoying. Do not presume that it adds to the environment” (Crystal City - 2/5 Rating)

“Lighting angles and types create distracting shadows, make it difficult to seek and read products and displays.” (Crystal City - 2/5 Rating)

“The lighting is sum what dim some patrons may not be able to view certain literature that is available throughout the store.” (Crystal City - 4/10 Rating)

“This commuter store (rosslyn) has lighting that is too dim.” (Rosslyn - 1/5 Rating; Another Rosslyn comment was similar - 2/5 rating)

“Need to put up signs when someones on break.” (Rosslyn - 5/10)

“Store was unable to transfer my remaining balance on my Smarttrip card (damaged) to my new one. Now I have to call someone else to finish this task.” (Crystal City)

Q12: Why did you give that rating?
A Few Comments

Comments on opening hours being too late (5 from Rosslyn, 7 from Crystal City, 3 from Ballston)

Comments on closing hours being too early (1 from Rosslyn, 1 from Crystal City, 2 from Ballston)

Comments indicating more weekend hours would also be welcome and more locations are necessary (not always in Arlington).

Comments on difficulty in finding the store (8 from Ballston, 5 from Crystal City, 4 from Rosslyn)

“Please [staff] the store with more [individuals] at the beginning and at the end of the month to accommodate all those persons that come in to buy the monthly passes.” (Rosslyn)

“The commuter store’s bus is an excellent option for us commuters. Recommend expanding this service in number of buses and operating hours.” (Mobile)

“As far as the store location in regards to proximity to my job…It would be nice if the mobile store offered days near L’Enfant that were on/around the first of the month, as we do not receive our monthly transit benefits at work until then.” (Mobile)
The Commuter Store Staff
Ballston: 2009 Ratings Are Up Across the Board, But Not Significantly With the Exception of “Helpful”

Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?
Ballston:
The 0 to 10 Scale Yields Similar Results
Except “Knowledgeable” Is Slightly Higher

- Knowledgeable: 7% 10% 81% 98%
- Helpful: 9% 7% 80% 96%
- Professional: 11% 7% 74% 92%

Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?

5-point Scale
Top 2 box:
Knowledgeable - 93%
Helpful - 97%
Professional - 93%
Crystal City:
2009 Ratings Are Down Significantly Across the Board, Yet Still Very High

Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?

<table>
<thead>
<tr>
<th></th>
<th>2009 - 5, Completely agree</th>
<th>2009 - 4</th>
<th>2007 - 5, Strongly agree</th>
<th>2007 - 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledgeable</td>
<td>97%</td>
<td>91%</td>
<td>96%</td>
<td>87%</td>
</tr>
<tr>
<td>Helpful</td>
<td>75%</td>
<td>65%</td>
<td>78%</td>
<td>66%</td>
</tr>
<tr>
<td>Professional</td>
<td>22%</td>
<td>26%</td>
<td>18%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Crystal City
2007 n = 200
2009 n = 105

Sample size varies as it does not include those who said “don’t know.”
Crystal City: The 0 to 10 Scale Yields Similar Results

- Knowledgeable: 11% (9), 14% (10), 64% (9-10), 89%
- Helpful: 9% (9), 12% (10), 64% (9-10), 85%
- Professional: 9% (9), 12% (10), 63% (9-10), 84%

Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?
Rosslyn:
2009 Ratings Are Up Across the Board, But Not Significantly

Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?

Sample size varies as it does not include those who said “don’t know.”
Rosslyn:
The 0 to 10 Scale Yields Somewhat Similar Results

Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?

5-point Scale top 2 box:
Helpful - 98%
Knowledgeable - 97%
Professional - 99%

Rosslyn 2009 n = 90
Sample size varies as it does not include those who said “don’t know.”
Mobile:
The Majority Agree with These Statements About the Staff

Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?

- Helpful
- Professional
- Knowledgeable

Mobile
n = 17

Actual numbers shown due to small sample size.
Mobile:
All Respondents Gave the Staff a 4 or 5 for These Qualities

Mobile
n = 27

Actual numbers shown due to small sample size.

Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?
A Few Comments

“I have come into the store a number of times in which there has been no line and it took a few moments for the staff to stop speaking in the back of the store and come and help me out. They also routinely speakin quiet voices that are difficult to hear. I don't have any faith that if I had a question that they could be able to answer faithfully. I always have to lay out exactly what I want, which is basic and sometimes that seems to be less than understood.” (Crystal City - 2/5 Rating)

“Smiles are free and should be freely given away by your staff. They aren't…” (Crystal City - 2/5 Rating)

“The person behind the counter was okay...didn't need the gum popping.” (Crystal City - 2/5 Rating)

“The staff needs to be reminded and trained about CUSTOMER SERVICE! Treat the store as a commercial service provider and not a government entity.” (Crystal City)

Please hire more staff to accomodate the last and first day of the commuting month. the line can be riddiculous.” (Rosslyn)

“I've been here when the lines are long and only one person was working at half speed” and the other doing who knows what. People have left the line over that.” (Crystal City)

Q16: Why did you give that rating?
A Few Comments

“Darlene is the one I normally deal with. She has been great! Sometimes they do not smile, but they are really friendly. I have gotten to know them well.” (Ballston)

“Dee was very friendly … gives DC a warm feeling.” (Rosslyn)

“Excellent staff at the Crystal city store.” (Crystal City)

“Its a big help to have someone that speaks spanish. It helps out a lot.” (Ballston)

“Rosslyn staff is always helpful- have visited other commuter stores and this staff is the best location.” (Rosslyn)

“The staff is one of my favorite parts of the Mobile store.” (Mobile)

“They're pro-active, but not pushy.” (Mobile)

“Angela is wonderful. in for a raise.” (Crystal City)

“This is why I stop here… Ms. Dee and Mike” (Rosslyn)

Q16: Why did you give that rating?
Commuter Store Customer Satisfaction
90% Had a Good Experience!

Q4: How would you rate your overall experience in The Commuter Store today? (0 to 10 scale)

Those who made a purchase are more likely than those who did not to give top two box ratings (9 or 10).
Southeastern Institute of Research

Commuter Store Maintains its High Customer Satisfaction

2007 n = 546
2009 n = 283

Note: First 66 in store Comment Cards had top-two box score of 95%.

Does not include those who said “don’t know.”

Q4/3: How would you rate your overall experience in The Commuter Store today? (1 - 5 scale)

Those who made a purchase are more likely than those who did not to rate the store a “5.”
The Scores Are Not Significantly Different Among the Stores

Q4: How would you rate your overall experience in The Commuter Store today? (0 to 10 scale)

- Ballston: 93%
- Crystal City: 88%
- Rosslyn: 90%
- Mobile Store: 59%

5-point Scale
- Top 2 box: Ballston - 97%, Crystal City - 89%, Rosslyn - 97%, Mobile - 96%
A Few Comments - Ballston

“every time i come to this store i always gets smiles and good customer service.”

“I always find what I need and there is never a long (more than 5 min) wait. The customer service is always a pleasant experience.”

“The representatives are always very courteous and very helpful with any of my commuting needs.”

“Unable to complete my desired transaction (exchange invalid metro fare cards)”

Q5: Why did you give that rating?
A Few Comments - Crystal City

“Because the ladies that wait on me are wonderful, professional and FAST!! That is the most important!”

“I have always received tip top service and the staff listens and trys to work with you.”

“associates are capable but not always speedy and could be a little more pleasant”

“Because they couldn't do what I wanted them to do. Transfer the balance of one smartcard to a new smartcard.”

“Brochures not always up to date when changes made. Sometimes lines are pretty long.”

“I am new to this area and the person at the desk was not willing to explain things in detail.”

Q5: Why did you give that rating?
A Few Comments - Rosslyn

“Always helpful and courteous staff. Same people for many years. Clean efficient office and very convenient.”

“Because the customer service is great and you can found everything you need to trip around the metro area.”

“Great friendly service and support. The atomosphere/environment is professional and customer friendly.”

“Quick and friendly service, and they gave nice explanations as to how the transit card [works].”

“Service should include people service + location accesibility for everybody. Even when the service is good, Arlington only location makes me rate it with a 6.”

Q5: Why did you give that rating?
A Few Comments - Mobile Store

“The attendant is always professional and helpful.”

“They had everything I was looking for. The info is up-to-date. The people were friendly, polite, and helpful, and the place is clean.”

A Few Comments - Shirlington

“Because I am pleased to and satisfied with their services from time to time when I need.”

“It was comfortable and easy to access.”

Q5: Why did you give that rating?
Net Promoter Score

Q6. How likely would you be to recommend The Commuter Store to someone who needs information or products related to traveling around Arlington County?
The “Net Promoter Score”

based on the 0 to 10 scale

• The Net Promoter Score is defined as

The percentage of promoters
(rating 9 or 10)

Less:

The percentage of detractors
(rating 0 through 6)

Commuter Store Net Promoter Score

84% (all respondents)

5%

79%

Net Promoter from 1 to 5 scale respondents - 2007 - 78% 2009 - 83%

Note: First 66 in store Comment Cards had Net Promoter Score of 91% (1 to 5 scale).

2009 n = 282
Arlington County Commuter Services
Satisfaction and Net Promoter Scores

All of these prior scores are based on the 1 to 5 scale.

<table>
<thead>
<tr>
<th>Service</th>
<th>Satisfaction</th>
<th>Net Promoter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential Services</td>
<td>79%</td>
<td>62%</td>
</tr>
<tr>
<td>Employer Services</td>
<td>75%</td>
<td>60%</td>
</tr>
<tr>
<td>Commuter Store</td>
<td>95%</td>
<td>78%</td>
</tr>
<tr>
<td>Commuter Direct (Individuals)</td>
<td>89%</td>
<td>82%</td>
</tr>
<tr>
<td>Commuter Direct (Corporate)</td>
<td>95%</td>
<td>96%</td>
</tr>
<tr>
<td>BikeArlington</td>
<td>59%</td>
<td>58%</td>
</tr>
<tr>
<td>WALKArlington</td>
<td>61%</td>
<td>49%</td>
</tr>
<tr>
<td>ART</td>
<td>85%</td>
<td>84%</td>
</tr>
</tbody>
</table>
Not Surprisingly, Loyalists Are More Likely to Recommend

Q7: How likely would you be to recommend The Commuter Store to someone who needs information or products related to traveling around Arlington County?

Shopper = Respondent uses multiple sources to purchase tickets
Loyalist = Respondent only purchases tickets from The Commuter Store

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Shopper</th>
<th>Loyalist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very likely</td>
<td>11%</td>
<td>91%</td>
</tr>
<tr>
<td>Somewhat likely</td>
<td>6%</td>
<td>11%</td>
</tr>
<tr>
<td>Neither unlikely nor likely</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Somewhat unlikely</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Very unlikely</td>
<td>2%</td>
<td>10%</td>
</tr>
</tbody>
</table>
87% Are Likely to Return

Those who made a purchase are more likely than those who did not to say they are certain to return.

Q7: How likely are you to visit a Commuter Store in the future? (0 to 10 scale)

2009 n = 282
The Majority of Customers Are Still Likely to Return

Those who made a purchase are more likely than those who did not to say they are very likely to return.

Q7/6: How likely are you to visit a Commuter Store in the future? (1 to 5 scale)

2007 n = 540
2009 n = 278

Does not include those who said “don’t know.”
Rosslyn Respondents Are Less Likely To Return, But More Than 8 in 10 Still Plan To

<table>
<thead>
<tr>
<th>Location</th>
<th>Score</th>
<th>Likely to Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballston</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>Crystal City</td>
<td>7%</td>
<td>82%</td>
</tr>
<tr>
<td>Rosslyn</td>
<td>8%</td>
<td>64%</td>
</tr>
</tbody>
</table>

Most who are unlikely to return say it is because they do not live in the area or do not need to service.

Q7: How likely are you to visit a Commuter Store in the future? (0 to 10 scale)
Impact of The Commuter Store™
One Third Have Made a Change in Work Travel Since First Visiting The Commuter Store

Younger customers are more likely to have made changes: 69% of Gen Y, 54% of Gen X, 41% of Boomers, and 38% of Silent Generation said they made a change.

Q17: Since you first visited The Commuter Store, have you made any of the following changes in how you travel to work?

- Made a change (2007: 33%, 2009: 2%)
- Did not make a change (2007: 51%, 2009: 52%)
- Don’t know/no answer (2007: 4%, 2009: 1%)
- First Visit (2007: 8%, 2009: 10%)
- Not working (2007: 5%, 2009: 5%)

Note: First 66 in store Comment Cards indicated 35% with work changes.
Those Who Visit Frequently Or Who Have Been Coming to the Store for Longer Are More Likely to Make Work Changes

Also, Frequent Visitors Are Less Likely to Not Be Working

Q17: Since you first visited The Commuter Store, have you made any of the following changes in how you travel to work?
Most Work Travel Changes Involve Starting or Increasing Transit Use

<table>
<thead>
<tr>
<th>Travel Change</th>
<th>2007 (%)</th>
<th>2009 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Started riding train</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Ride train more often</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>Started riding bus</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Ride bus more often</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Started riding bike</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Ride bike more often</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Started walking</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Walk more often</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Started carpooling</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Carpool more often</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Started teleworking</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Telework more often</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

2007 n = 177
2009 n = 184

Q17: Since you first visited The Commuter Store, have you made any of the following changes in how you travel to work? MULTIPLE RESPONSES

2007 data not directly comparable due to different options:
- Started train - 47%
- Train more often - 52%
- Started carpool - 3%
- Carpool more often - 5%
- Started bike/walk - 5%
- Bike/walk more often - 7%
- Started telework - 7%
- Telework more often - 5%
29% Sited Gas Prices or the Economy (Costs) as the Impetus for Change

Q17A: What influenced your decision to make this change? MULTIPLE RESPONSES ACCEPTED

- Gas prices/economy: 29%
- Job change/moved: 9%
- Traffic: 6%
- Employer changes: 5%
- Environment: 4%
- Commute time: 3%
- Other: 59%

2009 n = 141

Two mentioned Commuter Store directly: “The commute is cheap, the commute store offers schedules that are very precise to my commute. Plus it saves the environment and my health.” and “The Commuter store provided excellent information about VRE, answered my questions about VRE and also sells VRE tickets. You cannot gain thorough VRE information from an outdoor terminal that is confusing to understand.”
39% Said The Commuter Store Influenced Their Change in Commute

Q17B: Did any information, service, or benefit you received from The Commuter Store influence you or assist you to make this change?

2009 n = 188

Younger customers are more likely to say that Commuter Store assisted in this change: 50% of Gen Y, 49% of Gen X, 27% of Boomers, and 33% of Silent Generation said services received from the Commuter Store influenced them to make the change.
Frequency or Experience Does Not Appear to Have an Impact on Store Effectiveness

Q17B: Did any information, service, or benefit you received from The Commuter Store influence you or assist you to make this change?
Fewer in 2009 Drove Alone Before Changing Their Commute Mode

Q17D/17A: How did you typically travel to work before you made this change?

<table>
<thead>
<tr>
<th>Travel Mode</th>
<th>2007 n = 100</th>
<th>2009 n = 185</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drove alone</td>
<td>64%</td>
<td>42%</td>
</tr>
<tr>
<td>Rode train/bus</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Car/vanpooled</td>
<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>Walked</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Bicycled</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Didn't work then</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Teleworked</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Fewer in 2009 Have Made a Change in **Non-Work Travel** Since First Visiting The Commuter Store

Q18: Since you first started going to The Commuter Store, have you made any of the following changes in how you make non-work trips around Arlington County or around the Washington metropolitan region?

- **Made a change**
  - 2007: 35%
  - 2009: 28%

- **Did not make a change**
  - 2007: 65%
  - 2009: 72%

Generation Y is significantly more likely than older generations to have made a change - 49% indicated they did.

Note: First 66 in store Comment Cards indicated 27% with work changes.

2007 n = 498
2009 n = 507

Does not include those who said “don’t know” which was only offered as an option in 2007.
Frequency or Experience Does Not Appear to Have an Impact on Non-Work Changes

Q18: Since you first started going to The Commuter Store, have you made any of the following changes in how you make non-work trips around Arlington County or around the Washington metropolitan region? NOT ASKED OF THOSE WHO SAID IT WAS THEIR FIRST TIME IN Q17

Frequent Newbies
n = 126
Frequent Veterans
n = 199
Occasional Newbies
n = 29
Occasional Veterans
n = 60
First Timers
n = 67
48% said The Commuter Store influenced their change in non-work trips.

Q18C: Did any information, service, or benefit you received from The Commuter Store influence you or assist you to make this change?

2009 n = 146
Frequency or Experience Does Not Appear to Have an Impact on Store Effectiveness

CAUTION SMALL SAMPLE SIZES

Frequent Newbies
n = 33
Frequent Veterans
n = 56
Occasional Newbies
n = 10
Occasional Veterans
n = 20
First Timers
n = 20

Q18C: Did any information, service, or benefit you received from The Commuter Store influence you or assist you to make this change?
Other Arlington Services
Commuter Store Customers Are Familiar with Many of These Services and Some Have Used Them

<table>
<thead>
<tr>
<th>Service</th>
<th>Have used in the past</th>
<th>Have not used but am aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro / WMATA</td>
<td>74%</td>
<td>86%</td>
</tr>
<tr>
<td>VRE</td>
<td>32%</td>
<td>71%</td>
</tr>
<tr>
<td>ART</td>
<td>24%</td>
<td>60%</td>
</tr>
<tr>
<td>CommuterDirect.com</td>
<td>22%</td>
<td>52%</td>
</tr>
<tr>
<td>CommuterPage.com</td>
<td>22%</td>
<td>49%</td>
</tr>
<tr>
<td>Commuter Connections</td>
<td>20%</td>
<td>52%</td>
</tr>
<tr>
<td>ACCS</td>
<td>16%</td>
<td>48%</td>
</tr>
<tr>
<td>BikeArlington</td>
<td>8%</td>
<td>43%</td>
</tr>
<tr>
<td>WALKArlington</td>
<td>6%</td>
<td>33%</td>
</tr>
<tr>
<td>Car Free Diet</td>
<td>4%</td>
<td>31%</td>
</tr>
<tr>
<td>Telework VA!</td>
<td>2%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Q10: Following is a list of commuter services. In the first column, check all the services or benefits that you have used. For those that you have not used, please indicate if you are aware of them or not.
Differences Among Generations in Services Used

- Generation Y is more likely to have used carfreediet.com, but not significantly less or more likely to be aware of the campaign.
- The Silent Generation is more likely to be aware of WALKArlington than younger generations - significantly more than Generation X.
- The Silent Generation is more likely to have used ART, but not significantly less or more likely to be aware of the service.
- Boomers are most likely to use VRE; Generation Y is least likely.
The “Competition”
2009 Respondents Are Less Likely to Purchase Tickets

Q9/7: Do you typically purchase transit passes, tokens, or tickets through any sources other than The Commuter Store? MULTIPLE RESPONSES

2007 n = 548
2009 n = 569
2009 Respondents Are Less Likely to Look for Travel Information

Q9A/8: Do you typically look for local travel information through any sources other than The Commuter Store? MULTIPLE RESPONSE ACCEPTED

Males are more likely than females to say they do not look for travel info at the Commuter Store or any other location.

2007 n = 549
2009 n = 564
ACCS
Customer Panel
Q28: From time to time we would like to test new transportation services and programs with a panel made up of people like you. Panel members would share their opinions with us through short email surveys. We would not use your email for any other purpose - just periodic feedback.

Would you be interested in possibly participating on such a panel?
110 Respondents Would Like to Join the Commuter Stores Marketing Feedback Panel

Q29: Would you be interested in possibly participating on such a panel?
Q30: [IF YES] Please provide your email.
Strategic Implications
Celebrate Your Continued Success & Significant Impact
Customers Come From Afar and Are Happy to Be Here

- Continued high satisfaction and Net Promoter Scores
- Continued broad reach outside of Arlington
- 79% customers made a purchase
- 32% made a work change after coming to the Commuter Store and 39% of them say that Commuter Store contributed to that change
- 28% made a non-work change after coming to the Commuter Store and 48% of them say that Commuter Store contributed to that change
Turn Confidence Into Increased Production

• Thought Starter:
  - Celebrate your stars
  - Give out NPS Trophy
  - Set higher goals:
    • 80% (2007) and 79% (2009) made purchase ... so 20% to 21% did not... set new goal of 85% making purchases.
    - Explore in greater detail why information sought potentially decreased. Closely examine comments compared to what you have in the stores today.
Embrace A New “Consultative Selling” Perspective
Move to More Solutions Selling Versus Self-help Model

- Currently:
  - 79% purchase...what about 21% who do not?

- Thought Starter:
  - Move from a rational, transactional mindset towards an emotional, consultative relationship. Become their trusted resource for getting around — mobility and access.
Solutions Selling (Continued)

• **In-store messaging:** One way to do this is to shoot video of actual people using ACCS’ services - showcase 30-second vignettes of happy outcomes. Play these reinforcement messages on monitors in stores. Include both Arlington residents and those outside the county.

• **Store counter layout:** Current layout makes product appear like “self-service” take ones information resource center. Let your knowledge shine – help the customer “get it” ... have clerks wear “ask me” buttons... incentive clerks to offer customized advice. Move counter to the side and put clerks in the middle of store.

• **Store Staff:** Not all store staff seemed equally friendly. For transactional business, this may not be a top priority. However, if ACCS has larger ambitions for shifting behaviors, and adding value, the face of those efforts becomes the person behind the counter. Additional training may be needed. Increase the attention you give to training to insure it is consistently applied.
3
Build Your Brand Image
Brand Image Enhancement

• Currently:
  - WMATA is, *de facto*, taking credit for your stores.

• Thought Starter:
  - Launch a more aggressive internal signage identification branding system that directly links the Commuter Stores to Arlington County.
  - Give all ACCS services and products a brand personality - make going from the Commuter Store to CommuterPage.com seamless.
Expand Service Offerings
Some Customers Would Like Tourism and Travel Information Offered in the Commuter Stores

Q14: Please list any local travel information products or travel services that you need or want that are not offered at the Store. MULTIPLE RESPONSES ACCEPTED

- Commuter bus, MTA, and other bus items: 18%
- SmarTrip Services: 14%
- Tourism/local interests: 8%
- Other travel (incl air, AMTRAK, Greyhound etc): 7%
- Other Store Locations: 4%
- Other: 49%
Make The Commuter Store **The** Place to Go for Commuters, Residents, and Visitors.

- Thought Starter:
  1. Consider providing visitor services brochures for local attractions.
  2. Include suggested itineraries and related travel plans & routes for seeing regional attractions/museums. This information can be very specific, including links for schedules and fares. Attractions could be hot-linked to make the experience complete.
  3. Associating ACCS’ Commuter Stores with more Arlington County-centric (tourists) iconology will further advance the Commuter Stores’ image as a truly Arlington County service.
Consider Increasing SmarTrip Services
Your Store Users Are Asking For Help Centered Around SmarTrip

• Currently:
  - Many seem to be having problems with the SmarTrip cards in replacing, adding money, converting employer benefits, etc.
  - If these folks are having issues, imagine the potential if The Commuter Stores become the expert on this service.

• Thought Starter:
  - How can the Commuter Stores increase availability of services for the SmarTrip card from usage instructions/demonstrations down to selling card holders?
6

Build Your Store Traffic
Micro or Street Level Marketing

• Currently:
  - 37% of store users found the store by “just walking by,” the greatest source of how people learned of the Commuter Stores. Considering the volume of workers in each store area, more aggressive “mirco” or street level marketing may significantly grow store traffic.

• Thought Starters:
  - Put sandwich boards into action in front of the stores
  - Pay for paper products at area eateries where you can advance stores’ location, concept, and services on cups, napkins, table placemats, etc.
Explore The Hispanic Market Opportunity
This slide and the next one are from the ART 2008 Bus Rider Survey

32%

Elected to Respond to the Survey In Spanish
ART 2008 Bus Rider Survey

71% of Those Who Took the Survey in Spanish Prefer/Need Communications in Spanish

Translates to 9% of All Respondents

Frequent Riders (those who ride at least 5 days a week) are more likely to prefer the information in Spanish. Females are more likely to need the information in Spanish.

Can communicate using English: 17%
Prefer info in Spanish: 39%
Need Spanish: 32%
No Preference: 11%

Spanish Q14: What is your opinion about receiving information from ART in English?

n = 289
More Minority Respondents Were Captured in the 2009 Survey

Q24/26: Which one of the following best describes your racial background?

- White, non-Hispanic: 2007 n = 489, 2009 n = 520
- Black: 2007 n = 489, 2009 n = 520
- Hispanic: 2007 n = 489, 2009 n = 520
- Asian: 2007 n = 489, 2009 n = 520
- Other: 2007 n = 489, 2009 n = 520

Significantly more whites took the survey at Crystal City and more Hispanics took the survey at Ballston in 2009.

Of those who describe themselves as Hispanic - 12 of the 76 (16%) were first time visitors, 29 (38%) only started coming to the Stores in the past year, 22 (29%) first visited the stores in the past 1 to 4 years. This may account for some of the increase in Hispanic visitors.
Ballston: More Hispanics Took the Survey in 2009

Q24/26: Which one of the following best describes your racial background?

- White, non-Hispanic: 2007: 33%, 2009: 54%
- Black: 2007: 17%, 2009: 25%
- Hispanic: 2007: 8%, 2009: 35%
- Asian: 2007: 9%, 2009: 8%
- Other: 2007: 4%, 2009: 6%

2007 n = 157
2009 n = 144

Does not include those who said “don’t know” or preferred not to answer.
Rosslyn: Fewer Whites Took the Survey in 2009

Q24/26: Which one of the following best describes your racial background?

- White, non-Hispanic: 69% (2007) vs. 53% (2009)
- Black: 26% (2007) vs. 21% (2009)
- Hispanic: 4% (2007) vs. 6% (2009)
- Asian: 4% (2007) vs. 9% (2009)
- Other: 3% (2007) vs. 6% (2009)

Rosslyn
2007 n = 157
2009 n = 141

Does not include those who said “don’t know” or preferred not to answer
Is the Hispanic Market Untapped?

• Currently:
  - Ballston Store sample shows increase in use - sample issue over 2007 or early sign of increased use?
  - ART Study shows enormous impact of Hispanic riders.
  - Number one information sought out from Commuter Stores is transit-related info/tickets.

• Thought Starter:
  - Explore sample issue.
  - Think about Hispanic campaign advancing the free services you offer.
  - Think guerilla-like community marketing campaigns
  - Test multilingual staff at every location
Empower Your Stores’ Referral Network
A Quarter Heard About The Commuter Store From a Friend, Family Member or Co-worker

Q1: Where did you first hear about The Commuter Store?
79%

2009 Net Promoter Score

Yes, I would recommend the Commuter Store
Empower Your Customers To Sell You!

- **Thought Starter:**
  - Since your customer spends limited time in any one store, take the store to them in a way where it stays “top of mind” and in a manner where they can easily refer other people.
  - Simple monthly customer email newsletter:
    1. Build customers’ email database list.
    2. Make store personalities the face
    3. Focus on one key informational initiative per month. For example:
      - “Tips on having a better driving/commuting experience this Holiday”.
      - “Tips on how to get in and out of town on holiday weekend.”
      - “Tips on how to deal with Apple Blossom traffic.”
      - “5 travel tips for July 4 on the mall.”
    4. Ask customers to spread the word - send email to friends
    5. Monthly tips and e-newsletter could be promoted via in-store countertop info holders (large enough to hold a 3 x 7 card)
For Additional Information on this Study Contact:

Christy Evanko
Southeastern Institute of Research
804-358-8981