Arlington County
2007 Business Leaders Study

October 2007

Prepared By

LDA Consulting
Southeastern Institute of Research
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Study Background & Objectives
Study Background

- The Arlington County Business Leader Study is a component of the Arlington County Commuter Services (ACCS) 2006-2008 Research and Evaluation Plan.

- ACCS’ mission is to enhance the quality of life and economic vitality of Arlington by working to: reduce traffic congestion, reduce the demand for parking, provide for the maximum use of existing public transportation and High-Occupancy Vehicle (HOV) infrastructure, improve air quality, and improve mobility.

ACCS accomplishes its mission by encouraging people who live, work or commute through Arlington to use mass transit, car and vanpool, bicycle, walk, telecommute, and use other alternatives to driving alone. ACCS does this through the programs and services such as:

- Commuter Store
- Arlington Transportation Partners (employer-based transportation services)
- Commuterpage.com (Commuter information and schedules)
- CommuterDirect.com (Web site for purchasing transit fares)

- The overall purpose of this study is to obtain information to help identify the transportation needs of Arlington County businesses and assess ACCS’ performance in meeting these needs. Output of this study will help direct the development and implementation of ACCS’ employer-based programs and services.
Study Background

• The target for this study was Arlington County senior business leaders - the senior most company representative that could “officially speak for the company.”

• The total universe for this study was all Arlington County businesses. Unfortunately, from a research survey perspective, this is an extremely difficult group to capture as businesses form, move, expand, close, etc. on an ongoing basis. Consequently, there is no one optimal “finite list” of Arlington County companies.

• Complicating the kinetic nature of the greater Arlington County business community, ACCS’ limited budget for this study required the most efficient fieldwork approach - self-administered online and/or mail surveying if possible. This study could not afford the outbound business-to-businesses telephone interviewing necessary for it to be random.

• Given these two two considerations, ACCS approached the Arlington Economic Development (AED) for access to AED’s best list in exchange for including AED’s questions on this survey and subsequently sharing findings with AED.

• AED provided ACCS with their best list of top level business executives in Arlington County. This list was expanded with the inclusion of Arlington Transportation Partners’ (ATP) list of senior executives / target prospect companies and existing clients. The resulting “master list” of 842 companies (with their designated senior business leader’s names and addresses) was assumed to be a fairly good representative database of Arlington County’s total universe of businesses. (See respondent profile for more details).
Study Objectives

- Assess Arlington County business leaders’ perceptions of the relative importance of the County’s transportation system and related support programs and services (ACCS deliverables) as a component of Arlington County’s overall rating as a business location. Does the County’s transportation system make a difference when it comes to economic development?

- Gauge awareness, participation, and interest in employer-based transportation programs, activities, and services (ACCS’ current deliverables). Do they know these programs are available? Do they participate?

- Identify the specific benefits Arlington County business leaders’ ascribe to employer-based transportation programs, activities, and services (ACCS deliverables). Do they make a difference?

- Identify unmet needs and service opportunity areas for employer-based transportation programs, activities, and services (enhanced or new ACCS deliverables). What more can be done?

- Establish key benchmark measures to assess ACCS’ future performance in meeting the employer-based transportation program/service needs of Arlington County business leaders. How can we measure ACCS’s impact in the future?
Study Methodology
Study Methodology

- A 12-minute questionnaire was prepared by Arlington County Commuter Services (ACCS), SIR, and LDA.

- 842 Arlington County business leaders were invited by the Arlington Economic Development Commission to participate in the study via an initial mail letter.
  - The survey invitation letter was signed by Jerry Norris, Chairperson of the Arlington Economic Development Commission and CEO of Battlespace, Inc.

- Recipients were given three choices in how they took the survey:
  - Paper survey and mailing it back in a postage-paid envelope
  - Online survey
  - Calling SIR via an 800-number to take the survey over the phone

- Reminder emails and telephone calls were sent to most non-respondents
  - 255 emails sent to those for whom we had email addresses
  - 407 were called; 236 were reached in some manner, 171 had incorrect info
  - 60 contacts did not have an email address or phone number on record and were not contacted beyond the initial letter.

- The fieldwork was conducted from June 8 to July 13, 2007.
Out of the 843 Who Received an Invitation to This Survey . . .

- Did not complete: 66%
- Complete: 14%
- Incorrect Contact Information: 20%

843 invitations
Less:
- 171 incorrect phone numbers
- 672 “good” sample population
- 18% response among good addresses
- 120 respondents
61% of the 120 Total Respondents Opted to Respond Online

Note: There were actually 121 responses, but one paper survey was not included as the respondent indicated that they are not located in Arlington County. The online survey automatically terminated those without Arlington County locations.
Respondent Profile
Respondents Were Senior Management Executives

Q31: What is your title?
Most (83%) Respondents’ Companies Have Been Located in Arlington County for More Than Five Years

Q1: How long has your firm been located in Arlington County?

- Less than 1 year: 3%
- 1-5 years: 13%
- 6-10 years: 17%
- 11-15 years: 20%
- 16-20 years: 12%
- More than 20 years: 34%

83% More Than 5 Years
Most Respondents (71%) Have Been With Their Company for More Than Five Years

Q29: How long have you been with your current company?
One Third of Respondents Live in Arlington County

Live in Arlington: 33%

Live outside Arlington: 67%

Q30: Do you live in Arlington County?
Respondents Represent a Variety of Industries

- Non-profit: 18%
- Defense contracting: 14%
- Business/personnel/professional: 13%
- Banking/finance/insurance/real estate: 13%
- Hospitality/restaurants/hotels/tourism: 8%
- Education: 6%
- Technology consulting: 4%
- Retail/wholesale trade: 3%
- Construction/Building: 2%
- Manufacturing: 2%
- Public administration/government: 1%
- Other: 15%

Q2: What is the primary work or business of your organization?
The Majority of Respondents Are in Private, For-Profit Companies

Q3: Which of the following best describes your organization?

- Private company: 63%
- Non-profit: 27%
- Federal government agency: 3%
- State government agency: 1%
- Other: 5%

Government agencies were not targeted in the mailing; a few made it into the final respondent set.
Companies of All Sizes Are Represented

AC employees as a percentage of DC Metro employees ranges from 4.5% to 100%. The average is 90% and 76 respondents only have employees in Arlington County (100%).

The mean is 232 DC Metro employees and 100 Arlington County employees.

Q7: About how many employees work for your organization at all locations in the Washington Metropolitan region?
Q8: About how many employees work at locations in Arlington County?
Respondents’ Companies Are Located All Across Arlington County

Note: The Highest Distribution of respondent firms are in the Areas with Commuter Stores

Q6: Please select the area that best describes the primary location of your worksite?
2 in 3 Respondents’ Work for Companies That Are Just Located In Arlington County

63%
(76) respondents just have locations in Arlington County

37%
(43) respondents have additional locations outside of Arlington County in Metro Washington Area

- 57% of companies surveyed only have one location in the DC Metro area (which happens to be in Arlington County)
- 78% of companies surveyed have only one Arlington County location.

Q4: How many work locations does your organization have in the Washington metropolitan region?

Q5: How many of these work locations are in Arlington County?
Detailed Findings
Detailed Findings: Table Of Contents

- Overall Ratings of Arlington County as a Business Location
- Arlington County’s Transportation System Ratings
- Transportation System’s Impacts on the County’s Business Location Ratings
- Current Participation Level of Employer-based Transportation Benefit Services
- Interest in Employer-based Transportation Programs
- Barriers to Participating in Employer-based Transportation Programs
- The Benefits of Employer-based Transportation Programs
- Awareness of Arlington County’s Transportation Services
- The Impact of Arlington County’s Employer-based Transportation Services
- The Future: Business Leaders Thoughts on Planning for Arlington County’s Transportation System
- Future Engagement: Business Leaders Who Want to Stay Engaged
Overall Ratings of Arlington County as a Business Location
Considering all factors that are important to your organization as a place to locate your business, how would you rate Arlington County?
Arlington County Business Leaders Say Arlington County Is a Good Place to Locate a Business!

Overall Mean is 4.4 out of 5

Q9: Considering all factors that are important to your organization as a place to locate your business, how would you rate Arlington County?

- 5 - Very good: 63%
- 4: 25%
- 3: 9%
- 2: 2%
- 1 - Not very good: 2%

Note: In a recent Virginia Economic Development Partnership Study, 39% listed Virginia as a favorable state to locate a business. The #1 state of the 6 options given was North Carolina with 56%. However, these questions were asked differently of different audiences and are not directly comparable.
Why did you give that rating?

Considering all factors that are important to your organization as a place to locate your business, how would you rate Arlington County?

(OPEN END)
Respondent Quotes:
“Why Did You Give That Rating?”

Note: These Respondents all gave a “3” rating

“It is relatively removed from DC, which is bad in terms of client relations but good in terms of commuting and access. Traffic is still pretty bad, which is why I’d only give it an average rating.”

“The rating would be higher if we did not have some many difficulties with nearby construction. Roads are narrowed and damaged. In our area, road are in very poor shape. Frequently, construction crews are allowed to stop traffic for long periods. We do not believe that Arlington County adequately prioritizes the health and safety of people who work near construction sites.”

“Proximity to clients is good; convenience for employees is not good (commute/traffic).”
Respondent Quotes:
“Why Did You Give That Rating?”

Note: These Respondents all gave a “4” rating

“The area is central to everything. Our clients tell us that is one of the top reasons they office with us.”

“Arlington County provides very good business infrastructure and environment, except that the processes for permitting new business and construction inhibits business growth.”

“The County government is, at times unfriendly toward the business community and often fails to take their viewpoint into consideration when decisions are made.”

“Accessible to any amenities and services with a strong nationwide image for being a prime location.”
Respondent Quotes: “Why Did You Give That Rating?”

Note: These Respondents all gave a “5” rating

“Availability of transportation resources; quality of life; proximity of other organizations with which we do business.”

“Solid support for small business provided by AED and county gov’t in general. Low ‘red tape’ factor in setup & ongoing licensing & taxation issues.”

40% Listed Transportation Access as the Reason Arlington is a Good Place to Locate a Business!

Q9A: Why did you give that rating? (OPEN END)
Arlington County’s Transportation System Ratings
**Importance Attributes Ratings**

**Quality of Transportation System**
Rated Highest Among all Factors Influencing Location Decisions

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Rating Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation system</td>
<td>92%</td>
</tr>
<tr>
<td>Area reputation</td>
<td>83%</td>
</tr>
<tr>
<td>Proximity to customers</td>
<td>81%</td>
</tr>
<tr>
<td>Availability of skilled workforce</td>
<td>80%</td>
</tr>
<tr>
<td>Availability of business support svc.</td>
<td>64%</td>
</tr>
<tr>
<td>Tax structure/incentives</td>
<td>53%</td>
</tr>
<tr>
<td>Attractive residential communities</td>
<td>49%</td>
</tr>
<tr>
<td>Affordable employee housing</td>
<td>42%</td>
</tr>
<tr>
<td>Quality of K-12 education</td>
<td>41%</td>
</tr>
<tr>
<td>Quality colleges/universities</td>
<td>38%</td>
</tr>
<tr>
<td>Workforce training</td>
<td>31%</td>
</tr>
<tr>
<td>Entertainment opportunities</td>
<td>30%</td>
</tr>
<tr>
<td>Recreational opportunities</td>
<td>27%</td>
</tr>
</tbody>
</table>

Q10: When your organization considers alternative locations for your business or part of your business, how important are each of these attributes in the decision process?
Proximity to Customers Cited as the Single Most Important Attribute, Transportation Ranks Second

Q10A: What is the single most important attribute in selecting a location to relocate your business? (OPEN END)

n = 105
How Arlington County Performs on Attributes

Transportation System and Proximity to Customers Rank Second Only to Area Reputation in Terms of Arlington County’s Performance

Q11: Based on your experience with locating in Arlington County, please rate Arlington County’s performing in delivering on the attributes?

Complete breakdown of Q10 including percentages who answered “1,” “2,” or “3,” available in the appendix.
Recall, ATP Clients Are Slightly More Likely to Be Satisfied with Arlington County’s Transportation System Than With Metro Washington Transportation System

(ATP Clients Mostly Human Resource Managers/Directors and facility managers)

QB1: How satisfied are you with the transportation system in the Washington metropolitan region?
QB2: And how satisfied you are with the transportation system in Arlington County?

Note: This slide is from another ACCS Study: The 2007 ATP Client Survey
Arlington County Business Leaders
Also Slightly More Satisfied with Arlington County Transportation System

The mean was 3.5 for DC Metro and 3.8 for Arlington County.

Note: None of the differences is statistically significant at the 95% level.

Q12: How satisfied are you with the transportation system in the Washington metro region? Overall, how satisfied are you with the regional transportation system?

Q13: How satisfied are you with the transportation system in Arlington County?

51% gave DC Metro a Top-2 Box Score

62% gave Arlington a Top-2 Box Score
Transportation System Impacts on the County’s Business Location Ratings
In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization’s ability to conduct business?
Arlington County’s Business Leaders Believe the County’s Transportation System Has a Positive Impact on the Ability to Conduct Business

Less Than 16% Think it Has a Negative Effect

Note: Only 2 respondents (2%) gave all of these attributes a “3” indicating that transportation does not affect their organization.

Q21: In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization's ability to conduct business?
QB5: In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization?
**Southeastern Institute of Research**

Higher Satisfaction with Transportation Systems Parallels Positive Ratings as Business Location

**Q9:** Considering all factors that are important to your organization as a place to locate your business, how would you rate Arlington County?

- Satisfied with DC system n = 59
- Not satisfied with DC system n = 59
- Satisfied with AC system n = 72
- Not satisfied with AC system n = 44

How to read this slide:
Those who are satisfied with the transportation system are more likely than those who are not satisfied with the transportation to give Arlington County a 4 or 5 as a place to locate a business.
Current Participation Level

Employer-based Transportation Benefit Services
More Than Half of Business Executives Offer Flexible Work Schedules, Transit Schedules, and Teleworking

100 (83%) Respondents Offer at Least One Service/Benefit Program

Q22: Check all the services or benefits that are available to your employees. For those not available now, indicate if you would consider or not consider offering it.

- Flexible work schedules: 56%
- Transit schedules: 52%
- Teleworking: 52%
- Transportation options information: 45%
- Bike lockers/racks: 40%
- Transit benefits (e.g., Metrochek): 36%
- SmarTrip cards: 32%
- Compressed workweek: 28%
- Car/Vanpool reserved parking: 22%
- Pre-tax transportation account: 20%
- Ridematching: 12%
- GRH: 10%
- Car/Vanpool financial benefit: 9%

Available now
Interest In

Employer-based
Transportation Programs
Of Those Who Do Not Offer the Service, Almost Half Would Consider Guaranteed Ride Home
Companies Do Not Seem as Interested in Car/Vanpool Benefits

Q22: Check all the services or benefits that are available to your employees. For those not available now, indicate if you would consider or not consider offering it.

<table>
<thead>
<tr>
<th>Service</th>
<th>Would consider</th>
<th>Would not consider</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRH</td>
<td>23%</td>
<td>45%</td>
</tr>
<tr>
<td>SmarTrip cards</td>
<td>13%</td>
<td>37%</td>
</tr>
<tr>
<td>Pre-tax transportation account</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Ridematching</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>Transportation options information</td>
<td>21%</td>
<td>30%</td>
</tr>
<tr>
<td>Bike lockers/racks</td>
<td>21%</td>
<td>30%</td>
</tr>
<tr>
<td>Transit benefits (e.g. Metrocheck)</td>
<td>16%</td>
<td>30%</td>
</tr>
<tr>
<td>Transit schedules</td>
<td>4%</td>
<td>28%</td>
</tr>
<tr>
<td>Car/Vanpool financial benefit</td>
<td>4%</td>
<td>27%</td>
</tr>
<tr>
<td>Car/Vanpool reserved parking</td>
<td>25%</td>
<td>37%</td>
</tr>
<tr>
<td>Compressed workweek</td>
<td>18%</td>
<td>43%</td>
</tr>
<tr>
<td>Teleworking</td>
<td>14%</td>
<td>28%</td>
</tr>
<tr>
<td>Flexible work schedules</td>
<td>9%</td>
<td>28%</td>
</tr>
</tbody>
</table>

0% 20% 40% 60% 80% 100%
Recall, a Third of ATP Client Employers Do Not Offer, But Would Be Willing to Offer Ridematching, Info, or GRH

QC1: Check all the services or benefits that are available to your employees. For those that are not available now, indicate if you would consider or would not consider offering it.

Note: Information from a separate study - The 2007 ATP Client Survey
Consideration of Employer-Based Transportation Benefit Programs

<table>
<thead>
<tr>
<th>Service</th>
<th>Do not currently offer</th>
<th>Would consider*</th>
<th>Would not consider*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation options information</td>
<td>55%</td>
<td>60%</td>
<td>14%</td>
</tr>
<tr>
<td>Transit schedules</td>
<td>48%</td>
<td>59%</td>
<td>9%</td>
</tr>
<tr>
<td>SmarTrip cards</td>
<td>68%</td>
<td>54%</td>
<td>19%</td>
</tr>
<tr>
<td>GRH</td>
<td>90%</td>
<td>50%</td>
<td>26%</td>
</tr>
<tr>
<td>Bike lockers/racks</td>
<td>60%</td>
<td>50%</td>
<td>26%</td>
</tr>
<tr>
<td>Transit financial benefits (Metrochek, SmartBenefits)</td>
<td>64%</td>
<td>47%</td>
<td>26%</td>
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<tr>
<td>Pre-tax transportation account</td>
<td>80%</td>
<td>46%</td>
<td>26%</td>
</tr>
<tr>
<td>Ridematching</td>
<td>88%</td>
<td>39%</td>
<td>30%</td>
</tr>
<tr>
<td>Car/Vanpool reserved parking</td>
<td>78%</td>
<td>32%</td>
<td>47%</td>
</tr>
<tr>
<td>Car/Vanpool financial benefit</td>
<td>91%</td>
<td>29%</td>
<td>49%</td>
</tr>
<tr>
<td>Teleworking</td>
<td>48%</td>
<td>29%</td>
<td>58%</td>
</tr>
<tr>
<td>Compressed workweek</td>
<td>72%</td>
<td>25%</td>
<td>60%</td>
</tr>
<tr>
<td>Flexible work schedules</td>
<td>44%</td>
<td>22%</td>
<td>63%</td>
</tr>
</tbody>
</table>

**“Would consider” and “Would not consider” percentages are based on the number that do not currently offer these services. The difference is made up in “don’t know.”**

Q22: Check all the services or benefits that are available to your employees. For those not available now, indicate if you would consider or not consider offering it.
Barriers to Participating in Employer-based Transportation Programs
Barriers To Offering Employer-based Transportation Programs & Services

“Bicycles not practical due to travel distances. Guaranteed ride home offered thru van pool providers - uncertain re: employees find of use. Parking @ Corp HQ is not a problem. Very few employees use Metro due to inconvenience & time”

“Cannot make the provisions universal for all company locations in the U.S.”

Q23: For what reasons does your organization not offer any transportation services to employees?
Barriers To Offering Employer-based Transportation Programs & Services

“No employee has requested these services”

“Employees, on certain occasions MUST be at work. Work may be in a different location every day (i.e., client’s office, not ours). We are as flexible as we can be.”

Q23: For what reasons does your organization not offer any transportation services to employees?
The Benefits of Employer-based Transportation Programs
Those Who Offer Employer-based Transportation Benefit Programs See Real Business-oriented Benefits

Q24: Has your organization benefited in any of the following ways by offering these services to employees?

- Easier to recruit: 45%
- Improved productivity: 40%
- Reduced absenteeism: 27%
- Reduced turnover: 26%
- Reduced operating costs: 16%
- Alleviated parking shortage: 13%
- Other benefits: 1%
- No benefit: 5%
- Don’t know: 32%

n = 96
More Services Offered is Positively Related to More Benefits Realized

Q24: Has your organization benefited in any of the following ways by offering these services to employees?

How to read this slide:
Those who offer 4 or more services are more likely than those who offer fewer to realize more benefits from offering transportation services.

Offer 4 or more services
51%

Offer 0 to 3 services
25%

n = 53
n = 67

2 or more benefits realized

25%
Awareness of Arlington County’s Transportation Services
Q14: Are you aware of the transportation support services offered by Arlington County?

3 Out of 4 Respondents Indicate They Are Aware of Transportation Support Services Offered by Arlington County

Yes, 76%
No, 24%

Note: Respondents whose firm has been located in Arlington County for more than 16 years are significantly more likely to be aware of transportation support services than those who have been in Arlington County for less than 5 (84% vs. 63%).
Virtually All Those Aware Indicated They Were at Least Somewhat Familiar with the Services

Among those aware
n = 87

Q15: How familiar are you with county transportation support services
Of Those Aware, Only 40% Indicated They Know the Organization’s Name

Q18: Do you know which organization provides transportation services to Arlington residents, employees and visitors?

Among those aware n = 89
Of the 32 Respondents Who Said “They Knew the Organization Who Provided Transportation Services” . . .

- 12 listed Arlington Transit or ART
- 8 listed Arlington Transportation Partners
- 4 listed Arlington County/ACCS
- 2 said CommuterPage.com
  (one of those also listed Way To Go Arlington)
- 2 said Department of Environmental Services or DES
- 1 said “Arlington Transportation Commission”
- 1 said Commuter Connections
- 1 said WMATA
- 1 said “Don’t know but they have contacted us several times”
## Name Recognition of ACCS and ATP as Compared with Other Studies

<table>
<thead>
<tr>
<th>Study</th>
<th>Respondents</th>
<th>Question</th>
<th>Recognized Organizations</th>
</tr>
</thead>
</table>
| **2007 Arlington Business Leader Study**       | 32 out of 120 | Do you know which county organization provides transportation services to Arlington County residents, employees, and visitors? If yes, what is the name of that organization? | 4 listed Arlington County/ACCS  
8 listed Arlington Transportation Partners  
12 listed Arlington Transit or ART  
2 said CommuterPage.com (one of those also listed WayToGoArlington) |
| **2007 ACCS Naming and Branding Survey**       | 57 out of 206 | Arlington County currently provides services to residents, workers, and visitors to help them find transportation options that meet their needs and make it easier for them to travel within Arlington County and around the Washington metropolitan region. These services include employer transportation management programs, sales of transit passes and tickets, transit route and schedule information, telework information, information on walking and bike trails, and car and vanpool assistance, among others. Are you aware of the name of the County’s organization that provides these programs and travel information services? If yes, what is the name you recall?  | 2 listed ACCS  
2 listed ATP |
| **2006 Arlington County Resident Telephone Study** | 446 out of 509 | Do you know of any organizations, phone numbers, or website that provides information on getting around Arlington or around the Washington region? If yes, what sources do you know? | 44 listed Arlington County related sources  
15 listed ACCS  
4 listed ATP |
Slightly More than Half of Those Aware Say They Have Used Arlington County’s Transportation Support Services

Among those aware  
\[ n = 87 \]

Q16: Have you ever used any of the transportation support services offered by Arlington County?

- Yes, 53%
- No, 45%
- Don’t know, 2%
Two-thirds Rate Arlington County’s Transportation Support Services Good or Very Good

Q17: How do you rate Arlington County’s transportation support services?

Mean is 3.8 out of 5

CAUTION SMALL SAMPLE SIZE: Among those who used n = 46

68% gave a Top-2 Box Score
Q25. Arlington Transportation Partners (ATP) is a county government organization that offers free transportation information and services to employers and residential communities in Arlington County.

ATP assists employers and property managers in offering transportation benefit programs that will help their employees and residents get around the Washington region.

What is your relationship with ATP? (please check one)

- Currently use ATP services
- Have used ATP services in the past, but do not currently
- Have heard of ATP but do not use their services
- Am not aware of this organization
- Other ______________________
- Don’t know
Almost Half of the Respondents Are Aware of ATP

Q25: What is your relationship with ATP?
According to ATP Records, Almost a Quarter Have a Relationship

- Do not have relationship, 76%
- Have current relationship, 24%

Source: ATP Records as of October 2007

Note: This is a senior management survey audience. It is possible, the company could have a relationship with ATP as most business-ATP relationships are through the human resource department, not top management.
The Impact of Arlington County’s Employer-based Transportation Services
Half of Arlington Business Executives (Who Are/Were ATP Clients) *Would Not* Have Implemented Services Without Assistance

<table>
<thead>
<tr>
<th></th>
<th>Business Leaders</th>
<th>ATP Client Employers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very unlikely</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Somewhat unlikely</td>
<td>5</td>
<td>12</td>
</tr>
<tr>
<td>Neither likely nor unlikely</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Somewhat likely</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td>Very likely</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0</td>
<td>4</td>
</tr>
</tbody>
</table>

Q26: If ATP’s assistance had not been available to your company how likely would your company have been to implement transportation services or benefit programs? ASKED ONLY OF THOSE WHO SAID THEY HAD A RELATIONSHIP WITH ATP IN Q25

QC12: If this assistance had not been available to you, how likely would you have been to implement these services? ASKED ONLY OF THOSE WHO ANSWERED “YES” IN Q9
ACCS’ Arlington County Business Leader Impact Model

Awareness/use of/ratings of ACCS/ATP

- Participation in employer-based transportation services and benefits realized

- Rating of quality of Arlington County’s transportation system

- Rating of Arlington County as a business location
Those Aware of Transportation Support Services Give Arlington County Higher Ratings as a Business Location

Note: This difference is significant at the 95% level.

Q9: Considering all factors that are important to your organization as a place to locate your business, how would you rate Arlington County?
Those Who Perceive Engagement With ATP Give Arlington County Higher Ratings as a Business Location

Say they currently use or have used ATP in past

- 25% use or have used ATP
- 75% do not use or have used ATP

Note: This difference is significant at the 95% level.

Say they are unaware of ATP

- 24% are unaware of ATP
- 56% are aware of ATP

80% of 24% not using ATP rate AC a 4 or 5 as a place to locate a business vs. 90% of 75% using ATP.

Q9: Considering all factors that are important to your organization as a place to locate your business, how would you rate Arlington County?

CAUTION
SMALL SAMPLE SIZES
Use or have used ATP n = 16
Not aware n = 41

90% of ATP clients rate AC a 4 or 5 as a place to locate a business vs. 87% of the 89 who are not ATP clients.

This difference is not statistically significant.
Those Offering Increased Services Give Arlington County Higher Ratings as a Business Location

Note: This difference is NOT significant at the 95% level.

Q9: Considering all factors that are important to your organization as a place to locate your business, how would you rate Arlington County?

Offer 0 to 3 services
- 26% rated 4
- 55% rated 5 - Very good

Offer 4 or more services
- 22% rated 4
- 67% rated 5 - Very good

Note: This difference is NOT significant at the 95% level.

Offer 0 to 3 services  n = 53
Offer 4 or more services  n = 67
More Benefits Realized is Also Positively Related to Higher Ratings for Arlington County

Q9: Considering all factors that are important to your organization as a place to locate your business, how would you rate Arlington County?

Q24: Has your organization benefited in any of the following ways by offering these services to employees?

- 0 or 1 benefit
  - 22% indicated 0 or 1 benefit
  - Rating 4: 92%
  - Rating 5: 82%

- 2 or more benefits
  - 28% indicated 2 or more benefits
  - Rating 4: 54%
  - Rating 5: 60%

Note: This difference is NOT significant at the 95% level.
Higher Satisfaction with Arlington’s Transportation System Parallels Higher Ratings as a Business Location

Q9: Considering all factors that are important to your organization as a place to locate your business, how would you rate Arlington County?

Note: This difference is significant at the 95% level.

Satisfied with Arlington trans. system
- 22%
- 74%

Less than satisfied with Arlington trans. System
- 30%
- 43%

Satisfied with AC system n = 72
Not satisfied with AC system n = 44
ACCS’s Arlington County Business Leader Impact Model

Awareness/use of/ratings of ACCS/ATP

Participation in employer-based transportation services and benefits realized

Rating of quality of Arlington County’s transportation system

Rating of Arlington County as a business location

• Among those aware of transportation support services, business location ratings are **15 points higher**
• Among those who have had prior and current use of ATP services, ratings are **20 points** over those unaware of ATP*

• Ratings are **8 points higher** among those with increased service offerings*
• Ratings are **10 points higher** among those who have increased benefit realization*

• Those with higher satisfaction with Arlington County’s Transportation System rate Arlington **23 points higher as a business location**

* These differences were not statistically significant as individual measures. However, in total, there is a statistically significant positive relationship between satisfaction with the transportation system and higher ratings for the county as a business
The Future

Business Leaders Thoughts on Planning for Arlington County’s Transportation System
Q20. Are there any comments, positive or negative, that you would like to make about Arlington County’s transportation systems and services?
Comments on Arlington County’s Transportation System and Services

“Obviously, road capacity is a huge issue, however additional capacity has a limit if effectiveness at a certain point. Maximizing the use of existing resources make more sense. I would like to see as much emphasis as possible in facilitating public transportation, even to the extend of requiring a shower facility in every building to allow more bicycle commuting. I have an issue right now where a new employee wants to commute via bike from Ashburn to Ballston, and he cannot find a public place (that doesn't require a gym membership) to shower to allow him to do that.”

“ART bus system needs to be more frequent and reliable. I would favor larger subsidies in order to get more people to ride the buses. Student discounts are a good start, but more needs to be done to move people out of their automobiles.”

Q20. Are there any comments, positive or negative, that you would like to make about Arlington County’s transportation systems and services?
Comments on Arlington County’s Transportation System and Services

“Looking forward to community bikes program. I’d like more emphasis on bikes as a normal way of getting around (we’re 7 minutes by bike from Georgetown, here in Clarendon, 1 hour from Vienna, 45 minutes from Bethesda) but, internally in Arlington, we should be using bikes so much more ......
I want us to be like Amsterdam!”

“Continue to support/promote time sharing vehicles (ZipCar is great for us) and more parking/feeder lots for metro use. Need more parking near Metro stations…”

Q20. Are there any comments, positive or negative, that you would like to make about Arlington County’s transportation systems and services?
Comments on Arlington County’s Transportation System and Services

“We need to add light rail, i.e., a modern streetcar system, to our transportation infrastructure. This would serve as an effective feeder system into Metro in corridors that do not have Metro stations. It would also encourage greater use of public transit because streetcars are viewed as a convenient alternative to private automobiles and a more attractive option than buses. They are easier to get on and off, have more predictable routes and schedules, can move more people, and are environmentally friendly. Streetcar lines would also provide a economic development engine, attracting more private investment in underdeveloped areas, and would therefore help produce more tax revenue downstream.”

Q20. Are there any comments, positive or negative, that you would like to make about Arlington County’s transportation systems and services?
Q19. If you had $100 to allocate across the following parts of Arlington County’s Transportation System, how would you do it? (The total must add to $100.)

___ Transportation infrastructure - roads
___ Transportation infrastructure - bus, bike paths, walking paths, etc.
___ Transportation services - information-based support services that help you maximize transit use, bicycling, walking, carpooling, and so forth

(Note: the above options were rotated)
Arlington County Business Leaders Say Allocate Almost Half of the County’s Transportation System Budget on Non-Road Alternatives & Services

Q19: If you had $100 to allocate across the following parts of Arlington County’s transportation system, how would you do it?

- Infrastructure - roads: $53
- Infrastructure - bus, bike paths, etc.: $27
- Transportation Services: $19

n = 99
Future Engagement

*Business Leaders Who Want to Stay Engaged*
Companies Are Interested in Pursuing a Relationship with ACCS’ ATP

Companies out of the 104 who do not or have not had a relationship with ATP are interested in now being contacted.

Q27. Are you interested in having a representative from Arlington Transportation Partners contact you or someone in your organization about transportation information or benefit programs they could provide to your organization?

This information was passed along to ATP for action in August of 2007.
Companies With Programs Want to Be Profiled As a Case Study

6

Companies out of the 100 who offer transportation programs to their employees are interested in being profiled.

Q28. ATP is looking for companies to profile in corporate sales materials that showcase the many advantages of employer involvement/assistance in their employees’ commutes. These materials are used to inform other employers about the popularity of ATP programs among employees and the difference these programs make in employee recruiting and retention. Would you be interested in being profiled as a case study?

This information was passed along to ATP for action in August of 2007
Key Take-A-Ways
Key Take-A-Ways

1. Arlington County Business leaders give the County high ratings as a business location.

2. The perceived quality of Arlington County’s transportation system has a direct relationship to decisions to locate a business or office within the county.

To Arlington County Business leaders, the quality of transportation system is the most important attribute when considering alternative locations for their business or part of their business. Great news - Arlington County transportation system as a business location attribute get the highest rating in performance relative to all other attributes. In fact, the County is perceived as doing better than the DC metropolitan area as a whole on this measure.

*Implication: This a major competitive advantage - this data can be used as support in economic development marketing materials.*
Key Take-A-Ways

3. Some level of employer-based transportation benefit programs are offered by 83% of Arlington County companies, and 58% of these companies say they receive real business benefits from these programs - especially recruitment and productivity.

Implication: This benefit or “value” message should be incorporated in communications to businesses to help open doors for ATP.
Key Take-A-Ways

4. 53% reported using Arlington County transportation services. Of this group 68% were satisfied with those services. But only 14% of the respondents said they are using or have used ATP services, ACCS’ services specifically designed for businesses. Use of ATP services shows a lift in rating of Arlington County as a place to locate one’s business.

*Implication: Support more aggressively ATP’s outreach and service efforts. Greater awareness and use of ATP transportation services will positively impact the ratings of the County’s quality of transportation system ratings and this may lead to higher overall business climate ratings.*
Key Take-A-Ways

5. Many Arlington County business leaders who said they weren’t offering specific employer-based programs expressed interest in using them. Many who don’t currently provide certain programs said they would consider offering them in the future (especially transit information). 16 companies indicated they wanted to be contacted by ATP, and half of those who use services would not have implemented the services they provide if they did not have assistance.

*Implication: There is opportunity for more aggressive outreach and service effort.*
Key Take-A-Ways

6. While 3 out of 4 respondents indicate they are aware of transportation support services offered by Arlington County, only 40% could recall a name. The organizational names were all over the map. Only a few recalled ATP, THE organization set up to serve businesses.

Implication: Elevate ATP’s B2B campaign to extend beyond the human resource director / manager or facilities managers. Engaging business leaders will have the positive benefits of improving overall ratings of the County’s transportation system ratings and business climate ratings.
Key Take-A-Ways

7. Arlington County business leader respondents allocated almost half of the County’s transportation system budget to non-road alternatives and services.

*Implication: Business leaders get it. Involve them in the ongoing journey to make Arlington county the national model on a truly balanced transportation system.*
For Additional Information on this Study Contact:

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