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Background, Objectives & Methodology
Background

• The 2007 CommuterDirect.com Study is a component of the 2006-2008 ACCS Program Research and Evaluation Plan.

• The purposes of the research study are to:
  - Collect and analyze information needed to assess the performance and impact of CommuterDirect.com.
  - Establish benchmarks from which performance gains can be made.
Objectives

- Profile current users
- Understand how the service is used
- Evaluate specific aspects of the service
  - Web site
  - Renewable orders
  - Contact regarding problems
  - Fulfillment
- Gauge overall satisfaction
- Measure impact
Methodology

• 3,070 email addresses of current CommuterDirect.com customers were provided by Redmon, the company who houses the CommuterDirect.com database.

• Notification of the study was sent via an email signed by Jay Freshi to all potential respondents on November 15, 2007.

• An email invitation with a link to the survey was sent by SIR on November 26, 2007.

• A $5 Starbucks card, offered for participation, was originally planned for the first 200 completed surveys
  - Offer extended by ACCS to all participants completing surveys
  - Survey taken off line December 14, 2007
  - Total completed surveys - 390; 13% response rate
Respondent Profile
58% of Respondents Live in Maryland

Q 34 What is your home zip code?

26 % Virginia residents
54% of Respondents Work in DC

- Maryland: 26%
- Arlington: 6%
- Other Virginia: 11%
- DC: 54%
- Other: 3%

17% work in Virginia

Q 37 What is your work zip code?

Asking only of those who work outside of the home
n = 372
Zip Code Map - Respondents’ Work

Frequency
- Red: 21 to 26
- Pink: 16 to 20
- White: 11 to 15
- Light Blue: 6 to 10
- Dark Blue: 1 to 5
Virtually All Respondents Are Employed Full Time

Q 35  What is your current employment status?

- Employed full time: 94%
- Employed part time: 3%
- Not employed: 2%
Respondents Are Primarily Boomers and Gen X

Q 39 Based on: In what year were you born?

Average age of respondent: 41
73% Consider Themselves White, Non-Hispanic

Q 40  Which of the following best describes your racial background?
51% of Respondents Have HH Incomes Between $60K and $120K

Q 41 Which category best represents your household’s total income?
Respondents Are Slightly More Likely To Be Female

Q 42 Are you (male/female)?

Male: 45%
Female: 52%
N.A.: 4%
Respondent Comparison with Sample
Research Interpretation Caution!

There will always be some research bias in terms of the types of people who respond to surveys. We have tied the respondents in this survey back to the original sample to show the differences. This does not, however, invalidate the findings.
Most *CommuterDirect* Customers Give a Maryland Shipping Address

- **Maryland**: 58% (54% Respondents - Q32 Home, 26% Respondents - Q37 Work, 49% Total Sample)
- **Arlington**: 49% (4% Respondents - Q32 Home, 6% Respondents - Q37 Work, 24% Total Sample)
- **Other Virginia**: 24% (24% Respondents - Q32 Home, 11% Respondents - Q37 Work, 24% Total Sample)
- **DC**: 54% (12% Respondents - Q32 Home, 7% Respondents - Q37 Work, 12% Total Sample)
- **Other**: 8% (8% Respondents - Q32 Home, 3% Respondents - Q37 Work, 12% Total Sample)

Q 32 What is your home zip code?
Q 37 What is your work zip code?

Database Source: Redmon; delivery address – which may be either work or home.
Survey Respondents Are More Likely Than the Total Sample to Order MARC Tickets
But Less Likely to Order Circulator Fare

Respondents were asked in Q3 which product they purchase the most, but the two are not directly comparable.

Database Source: Redmon
Survey Respondents Tend to Spend More and Order More Often Than the Total Sample

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<thead>
<tr>
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<th>Respondents</th>
<th>Total Sample</th>
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<tr>
<td>Order Total</td>
<td>$2,100</td>
<td>$1,662</td>
</tr>
<tr>
<td>12 mo. Order Total</td>
<td>$1,041</td>
<td>$663</td>
</tr>
<tr>
<td>Average Amt per Order</td>
<td>$153</td>
<td>$133</td>
</tr>
<tr>
<td>% with only 1 Order per Year</td>
<td>29</td>
<td>46</td>
</tr>
</tbody>
</table>
Respondents Are Twice as Likely as the Total Sample to Use the Renewable Service

Note: Those who have cancelled their renewable orders are included in the “ever” group, but not in the “current” group; Those who have just begun renewable services are included in the “current” group, but not the “ever” group; and those who are currently renewable and have had at least one fulfilled order, are in both groups.

All differences are significantly significant at the 95% level.

Q11 Do you use the renewable order service on CommuterDirect.com? Database Source: Redmon

Some respondents may have answered “Yes” if they had the service in the past.
Respondents are More Likely Than the Total Sample to Have Opened an Account More Than One Year Ago

Q 12 When did you first start using CommuterDirect.com?

Database Source: Redmon

All differences are significantly significant at the 95% level with one exception.
Commuting Habits
70% Typically Commute By Rail, 9% By Bus, Only 12% Drive Alone

Q36 What type of transportation do you typically use to get to work?
Q36a Do you ever use another type of transportation?

32% of total report using one mode exclusively.
68% have secondary modes they also use.
Among Those Using Secondary Modes, Metrorail and Drive Alone Are Most Common

32% of total report using one mode exclusively. 68% have secondary modes they also use.

Q36b What other types of transportation do you typically use to get to work?
48% of Those Using Secondary Modes Do So Only a Few Times Per Month or Less

Q36c How often do you typically use any of these other types of transportation to get to work?

Asking all of those using secondary modes
n = 258

- Few times a year/emergencies: 18%
- Once a month: 9%
- Few times a month: 21%
- One day per week: 7%
- Two days per week: 5%
- More than 2 days per week: 27%
- Other: 12%
60% Commute Over 30 Miles to Work

Q37a About how far is it from your home to work?

Average length of commute is 38.5 miles.

61 miles + 10%
51-60 miles 10%
41-50 miles 18%
31-40 miles 22%
21-30 miles 16%
11-20 miles 13%
10 miles or less 11%

0% 20% 40% 60% 80% 100%
42% Live Less Than a Mile from the Nearest Bus/Train Stop

Q38 How far is it from your home to the nearest bus stop or train station?

1-2 blocks: 19%
3-5 blocks (1/4 to 1/2 mile): 12%
6-10 blocks (1/2 to 1 mile): 11%
More than 10 blocks (more than 1 mile): 45%
Other: 11%
D.K.: 2%
Use of Service
Slightly Less Than Half Began Using *CommuterDirect* in the Past Year

Q 12 When did you first start using CommuterDirect.com?
49% Heard About *CommuterDirect*
Through Other Online Sources

Comparing with the Commuter Page study, Commuter Page users reported 61% had heard of Commuter Page through online sources, 8% via referral.

Q1 How did you originally hear about CommuterDirect.com?
Respondents Do Not Have A Clear Idea of Who Operates CommuterDirect.com

Q1a To the best of your knowledge, who operates CommuterDirect.com?

Those who have been account holders for longer than a year are more likely to say “Arlington.”
MARC and Metrorail Are the Most Common Transit Services For Which Passes/Fares Are Purchased

Recall, 59% of respondents use the Commuter Train as their primary transport, 11% use Metrorail, and 9% use the bus.

Q2 For which of the following transit services do you currently purchase passes, tokens, tickets, or other fares?
MARC Monthly Pass and SmarTrip Cards Are the Most Popular Types Purchased

Q3 Which of the following types of passes, tickets, or other transit fares do you typically purchase now?
63% Say They Purchase from *CommuterDirect* Once a Month

Q8 How often do you make purchases on CommuterDirect.com

- 2 or 3 times per month: 2%
- Once a month: 63%
- A few times a year: 17%
- Once a year: 4%
- Almost never: 12%

Once a month purchasers are more likely to have $120K+ annual income.
Infrequent Users Would Use More Often If They Had Need or Shipping Costs Were Less

Q8a What would make you use the site more often?

- If travel more/ if there is need: 28%
- Free/cheaper shipping: 21%
- Ability to recharge SmartTrip card: 7%
- Discounted fare: 5%

Asked of those purchasing a few times a year or less

n = 116
34% Have Discontinued Purchase of Fares They Previously Bought

Q4 Did you previously purchase fares for any transit service for which you no longer purchase fares? If so, please check all types of passes that you used to purchase.
Most Discontinued Purchases Were a Result of Not Needing the Tickets

Q4a For what reason did you stop purchasing fares for this (these) transit service (s)?

- No longer need it: 53%
- Purchase elsewhere: 9%
- Too expensive: 6%
- Other: 35%

Asked of those who have discontinued purchase of specific fares, n = 127
42% Pay All Costs Themselves; 14% Have Costs Covered Entirely By Company

Q 33 Whp pays for the transportation fares you purchase (on CommuterDirectcom and through other sources)?

Pay out of my own pocket: 42%
I pay and company reimburses 1-49%: 12%
Company directly pays 1-49%: 3%
Company directly pays 50-99%: 10%
I pay and company reimburses between 50 and 99%: 18%
Company directly pays 100%: 9%
I pay and company reimburses 100%: 5%

Pay out of own pocket are more likely to:
- Have income below $60k than over $120k
- Be Gen X than Boomer
- Spend $100 or less with CD vs $500 or more
- Do not have or never had renewable service
18% Have Also Made Purchase or Obtained Something At The Commuter Stores
But 22% Have Never Heard of The Stores; This is an Opportunity to Cross-Sell

Q24 How familiar are you with the Arlington County Commuter Stores (located in Ballston, Rosslyn, Crystal City as well as a mobile store)?
59% Have Visited CommuterPage.com One or More Times

But 25% Have Never Heard of CommuterPage.com; This is an Opportunity to Cross-Sell

Q25 How familiar are you with the Web site CommuterPage.com?
Competition
61% Say They Spend More Than $150 Per Month In Total On All Transit Fares

Average Spending Per Month: $188

Those with current renewable service spend $251 per month on all fares vs. $153 per month for those without current service.

Q9 How much do you spend per month on all transit fares (all sources including CommuterDirect.com and other places that you purchase)?
Q5 Do you currently purchase transit passes, tickets, or other fares through any sources other than CommuterDirect.com?
Ease of Purchase at Metro Is the Main Reason For Not Using CommuterDirect For All Purchases

Q5a Why do you not use CommuterDirect for all your transit fare needs? Please indicate if there are products or services you receive from these other sources that are not provided by CommuterDirect.com?

- Easier at Metro station: 25%
- Added shipping costs: 21%
- No need/purchase infrequently: 17%
- Get Metrochecks from employer: 15%
- Did not know CD offered: 7%

Asked of those not using for all purchases, n = 169

Shipping costs are a barrier
Among Those Using Other Sources For Some Purchases, *CommuterDirect* Is Still Used Most

Q6 Which source do you use most often for your transit fare purchases?

*CommuterDirect.com*: 35%

Train station: 28%

Employer: 9%

Commuter Store: 6%

Bus stop: 2%

Metro sales office: 2%

WMATA.com: 2%

Another website: 1%

Other: 12%

Asked of those purchasing from sources other than *Commuter Direct*

n = 181
Other Fare Sources Are Rated Highly Except on Customer Service

Q7 How do you rate ___ on each of the following characteristics? Please use a scale of 1 to 5 where 1 means “very poor” and 5 means “very good”.

Asked of those using source other than CommuterDirect for some or all purchases

 Asked of those for whom Commuter Direct is not their main source of purchase

n = 111

Note: Sample Sizes are too small to look at other fare sources individually.
Q17 The CommuterDirect.com website was updated in September 2006. Did you notice any changes?

Only 26% Recall Changes to Web Site From Sept 2006

- Yes, 26%
- No, 74%
Changes to the Site Are Viewed As Change For The Better By Three-quarters

Q17a Do you feel those changes made the site worse or better?

Asked of those recalling change
n = 102

74%
Those Positive About the Web Site Changes Cited Ease of Navigation Most Often

Easier to navigate/find what looking for: 26%
Appearance: 9%
More user friendly: 6%
Improved log in: 4%
Easier to understand: 4%

Q 17b What specifically is better?

Small sample n = 60
The Web Site Is Rated Very Highly On Most Characteristics

Q20 How do you rate CommuterDirect.com on each of the following characteristics? Please use a scale of 1 to 5 where 1 means “very poor” and 5 means “very good”.

- Readability - type size: 37% 51% 88%
- Information content: 37% 46% 83%
- Ease of use: 32% 50% 82%
- Reports: 27% 48% 75%
- Navigation: 34% 40% 74%
- Visuals/Images: 35% 39% 74%
- Technical issues: 32% 37% 69%

LDA Consulting
Comments From Those Giving Negative Ratings On Technical Issues

“Problems with issued cards are not dealt with immediately. If this is not in the realm of CommuterDirect, it doesn’t matter because you get blamed.”

“Problems with stopping renewals temporarily.”

“I was not able to get help when I needed it.”

“I am blind and use a screen reader. I have had difficulty with some tables and other features of the site.”

As asked of those giving a 1 or 2 rating on items in Q 20

Technical issues
n = 7

Q 21 you rated _____ a (1 or 2), why did you give it that rating?
Renewable Order Service
Nearly All Are Aware of the Renewable Order Service

Q10 Are you aware of the renewable order service on CommuterDirect.com?

Yes, 90%
No, 10%
50% of Those Aware of the Renewable Service Are Using It

According to Redmon’s Records, as of January 2008, 1,449 accounts since inception maintained renewable orders for 1 year or more, 714 of those for 2 or more years, 190 for 5 or more years.

As of those aware of renewable service
n = 350

Q11 Do you use the renewable order service on CommuterDirect.com?

Yes, 50%
No, 50%
Irregular Schedule/Infrequent Use Are Most Common Reasons For Not Using Renewable Service

- Irregular commute pattern: 23%
- Don’t need/infrequent user: 21%
- Prefer to order when needed: 15%
- Funding issues: 7%
- Unpredictable schedule: 6%

Q11a why don’t you use the renewable order service on CommuterDirect.com?

Asked of those aware of renewable service but not using it

n = 165
Q11b How would you rate your experience with the renewable order service on CommuterDirect.com? Please use a scale of 1 to 5 where 1 means your experience was “very poor” and 5 means your experience was “very good”.

- 5 - Very good: 76% (93%)
- 4: 17%
- 3: 4%
- 2: 1%
- 1 - Very poor: 0%

Asked of those who have used service
n = 174
Most Comments Offered About the Service Were Positive

Q 11c  Do you have any comments about the renewable order service?

Asked of those who have used service  
\[ n = 117 \]
Among Those Who Were Not Aware of Renewable Service, 28% Are Likely To Use in the Future

Q10a CommuterDirect.com has a renewable order service where orders are automatically renewed each pass period. Renewable orders are shipped to arrive a few days prior to the beginning of the specific pass period. How likely are you to use this service in the future?

CAUTION: SMALL SAMPLE SIZE
n = 40
Customer Service Contact
46% Said They Had Contacted *CommuterDirect* About a Problem

- Yes, 46%
- No, 53%
- DK, 2%

**Q 26** Have you ever needed to contact CommuterDirect.com about a problem with the website or with a transaction? **Q 27** How did you make this contact? **Q 28** When did you make this contact?

- 77% made contact by phone
- 18% by email
- 2% by letter

- 10% made contact within the past month
- 35% between 1 and 6 months
- 27% between 7 and 12 months
- 27% over a year ago
Reasons for Making Contact Were Order Problems or Difficulty With Site

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem with account/charges</td>
<td>16%</td>
</tr>
<tr>
<td>Did not receive pass/delayed</td>
<td>12%</td>
</tr>
<tr>
<td>Could not find something</td>
<td>9%</td>
</tr>
<tr>
<td>Needed help using</td>
<td>9%</td>
</tr>
<tr>
<td>Problem with site</td>
<td>7%</td>
</tr>
<tr>
<td>Problem with order</td>
<td>7%</td>
</tr>
<tr>
<td>Question</td>
<td>5%</td>
</tr>
<tr>
<td>Need information</td>
<td>3%</td>
</tr>
<tr>
<td>Need to cancel order</td>
<td>3%</td>
</tr>
<tr>
<td>Wrong ticket</td>
<td>3%</td>
</tr>
<tr>
<td>Lost ticket</td>
<td>2%</td>
</tr>
</tbody>
</table>

Those who contacted are more likely to:
- Have spent $500 or more with CD in past year
- Have or have had renewable Service

Q29 For what reason did you make this most recent contact?

n = 176

As of those who reported having made contact about a problem

Southeastern Institute of Research
79% Were Satisfied With Their Most Recent Contact

Q30 How satisfied are you with your most recent contact regarding CommuterDirect.com?

Asked of those who reported having made contact about a problem
n = 176
Fulfillment Services Are Rated Highly On Most Measures, But Only Half Find the Shipping Fees Reasonable

Q31 Do you agree with the following statements regarding the way items you purchase from CommuterDirect.com are delivered to you? Please use a scale of 1 to 5 where 1 means you “strongly disagree” and 5 means you “strongly agree”
Summary of Comments From Those Giving Ratings of 1 or 2

- Never had a problem with receiving my package
  - Delivered to wrong address/mishandled - 10
  - Shipped late/arrived late - 9
  - Non specific problem - 8
  - Did not receive - 4
  - Problem with courier/delivery signature - 4

- Shipping and handling fees are reasonable
  - Too high/excessive/steep/adds up - 29
  - Should have less expensive option/use regular mail - 24
  - Available free from other sources - 7

Q 32  You rated _____ a (1 or 2), why did you give it that rating?
Overall Experience
Overall Experience With *CommuterDirect* Is Rated Very Positively

Q13 How would you rate your overall experience with CommuterDirect.com? Please use a scale of 1 to 5 where 1 means your experience was “very poor” and 5 means your experience was “very good”.

Those giving a 5 rating are more likely to:
- Be Boomers than Gen X
- Have spent $500 or more with CD in past year than $100 or less
- Have or have had renewable Service
Timeliness and Ease of Use Were Cited Most Often As Reasons for Overall Ratings

Q 14  Why did you give it that rating?
Ease of Use Is Cited Most Often As What They Like About CommuterDirect

Q 15  What do you like about Commuter Direct.com?

- Ease of use: 42%
- Convenient: 26%
- Saves time/fast: 12%
- Online ordering: 11%
- Reliable: 8%
- Not having to go stand in line: 8%
- Renewable feature: 8%
- Customer service: 7%
- Helpful information: 3%
- Paying by credit card: 1%
Users Cite Lower Shipping Costs Most Often As What Could Make *CommuterDirect* Better

- Lower shipping cost: 18%
- Excellent as is: 15%
- Fine tune website: 15%
- Improve MetroChecks system: 11%
- Notify if credit card expiring: 2%
- Sturdier passes: 1%

Q 16 How could we make CommuterDirect.com better?
Advertising Is Suggested as the Best Way to Attract More Users

Q 18 What in your opinion could CommuterDirect.com do to attract more users?
85% Are Likely To Recommend CommuterDirect.com

Q19 How likely is it that you would recommend CommuterDirect.com to a friend or colleague? Please use a scale of 1 to 5 for your answer where 1 means you are not at all likely and 5 means you are very likely to recommend CommuterDirect.com.

Those Very Likely to recommend are more likely to:
- Be Boomers than Gen X
- Have spent $500 or more with CD in past year
- Have or have had renewable Service
The “Net Promoter Score”

• The Net Promoter Score is defined as

The percentage of promoters (somewhat/very likely to recommend) 85% (all respondents)

Less:

The percentage of detractors (somewhat/very unlikely to recommend) 3%

CommuterDirect.com Net Promoter Score 82%
Other Net Promoter Scores

- CommuterDirect 82%
  - USAA 82%
  - HomeBanc* 81%
  - Harley-Davidson 81%
  - Costco 79%
  - Amazon 73%
  - Chick-Fil-A* 72%
  - Ebay 71%
  - Vanguard 70%
  - SAS 66%
  - Apple 66%
  - Intuit* 58%
  - Cisco 57%
  - Federal Express 56%
  - Southwest Airlines 51%
  - American Express 50%
  - Commerce Bank 50%
  - Dell 50%
  - Adobe 48%
  - Electronic Arts 48%

* All NPS statistics are based on Bain or Satmetrix surveys with the exceptions of Intuit, Chick-fil-A, and HomeBanc. For these firms, Satmetrix used data that the companies provided. Their data was gathered in a reasonable (but not perfectly equivalent) fashion.

Source: The Ultimate Question, Reichheld, 2006
Two Thirds Have Already Recommended *CommuterDirect* To Others

Yes, 67%

No, 33%

Q19a Have you ever recommended CommuterDirect.com

Those who have recommended are more likely to:

- Be Boomers than Gen X
- Have spent $500 or more with CD in past year
- Have or have had renewable Service
Impact of CommuterDirect.com
31% Indicate They Made a Change in Their Commute to Work Since Starting to Use *CommuterDirect*

Q22 Since you started using CommuterDirect.com, have you made any of the following changes in how you travel to work?

- Started riding train: 13%
- Ride train more often: 9%
- Started riding bus: 7%
- Ride bus more often: 4%
- Started walking/biking: 2%
- Walk/bike more often: 2%
- Did not make change: 69%

72% of those making a commute change started using/increased use of train

38% started using/increased use of bus

31% report making a change (total is higher as some respondents chose more than one category)
Change of Job/Location and Saving Money Influenced the Change Most Often

- Changed job/hours/location: 22%
- Save money: 21%
- Moved to new residence: 10%
- Save time: 10%
- Tired of driving/traffic: 9%
- Convenience: 8%
- Ease of use: 5%
- Proximity: 5%
- Reduce/congestion/pollution: 4%
- Personal reasons: 3%

Q22a What influenced your decision to make this change?

n = 105
22% Said *CommuterDirect* Had an Impact on Their Making a Change in Work Commutes

Q 22b Did any information, service or benefit you received from CommuterDirect.com influence you or assist you to make this change?

Asked of those who have made a change

n = 118
Drive Alone and Transit Were Used By Most Prior to Making a Change in Commute

- Drove alone all or most: 46%
- Rode bus/train all or most: 30%
- Car/vanpooled all or most: 3%
- Walked all or most: 2%
- Teleworked all or most: 2%
- Biked all or most: 1%

**Previous Drive Alone commuters were more likely to increase train use than bus.**

Q22d How did you typically travel to work before you made this change?

*Asked of those who have made a change  n = 118*
25% Say They Made a Change in Their Non-Work Patterns Since Starting To Use

25% report making a change (total is higher as some respondents chose more than one category)

Q23 Since you first started using CommuterDirect.com, have you made any of the following changes in how you make non-work trips around Arlington County or around the Washington metropolitan region?

- Ride train more often: 15%
- Started riding train: 6%
- Ride bus more often: 4%
- Walk more often: 4%
- Started riding bus: 2%
- Started walking to destinations: 2%
- Started biking to destinations: 1%
- Bike more often: 1%
- Did not make change: 75%

n = 98
35% Said *CommuterDirect* Had an Impact on Their Making a Non-Work Change

Q 23a Did any information, service or benefit you received from CommuterDirect.com influence you or assist you to make this change?

**Diagram:**
- Yes, 35%
- No, 55%
- DK, 10%

**Sample Size:**
- n = 98
Additional Opportunity
What Accounts for the Percentage of New Users Being So High?

- 60% of Current Account Holders in Database began service in 2007.
- Yet sales only grew 17% over the past year (2006 to 2007) and 10% from 2005 to 2006.
- There have been roughly 17,000 unique ship-to names since inception. There are 3,070 current accounts (have made a purchase in the last year).
- It is natural for any product or service to lose customers over time, but the numbers here seem exceptionally high.
What are the differences between Long-term and New Account Holders?
What is a Long-term Account Holder?

• Long-term Account Holders are defined as those who began service prior to 2007. (n = 194)

• New Account Holders began service in 2007, according to Database. (n = 196)
Long-term Account Holders Are More Likely to be Satisfied and to Recommend

• 95% of Long-term Account Holders are satisfied (top-two box) with *CommuterDirect* vs. 83% of New.

• 91% of Long-term Account Holders are likely to recommend (top-two box) vs. 80% of New.

• 82% of Long-term vs. 52% of New already had recommended.

• 86% of Long-term Account Holders are satisfied with recent Customer Service contact vs. 68% of New.
Long-Term Account Holders Use the Service Differently; Are More Likely to Renew

- 32% of Long-term Account Holders pay for transportation out of their own pocket vs 52% of New.

- 98% of Long-term Account Holders are aware of the renewable order service vs. 82% of New.

- 57% of Long-term Account Holders use the renewable service vs. 20% of New.

- 22% of Long-term Account Holders purchase SmarTrip cards vs. 36% of New.

- 49% of Long-term Account Holders purchase MARC Monthly Fares vs. 32% of New.
Long-term Account Holders Are More Likely to be Loyalists

- 62% of Long-term Account Holders ONLY purchase from CommuterDirect vs. only 42% of New.

- 51% of Long-term Account Holders use CommuterDirect most often vs. 25% of New.

- 19% of Long-term Account Holders also purchase fares at a train station/bus stop vs. 36% of New.

Loyalists (n = 204) are defined as those who only purchase from Commuter Direct, while Non-loyalists (n = 87) also purchase from other areas including WMATA.com. Those who also purchase at the stations or The Commuter Store (in addition to Commuter Direct), but no additional places are not included.
Long-term Account Holders Are Less Likely to Have Made a Change in Their Commute

- 23% of Long-term Account Holders made a work change in transit mode vs. 38% of New.
# Demographics Comparison

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Loyalists</th>
<th>Non-Loyalists</th>
<th>New Account Holders</th>
<th>Long-term Account Holders</th>
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</thead>
<tbody>
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<td><strong>% Employed</strong></td>
<td>94</td>
<td>95</td>
<td>94</td>
<td></td>
<td></td>
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<tr>
<td><strong>% Drive Alone</strong></td>
<td>12</td>
<td>11</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% Commuter Train Users</strong></td>
<td>59</td>
<td>69</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% Metrorail Users</strong></td>
<td>11</td>
<td>7</td>
<td>17</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% Income &lt; $60K</strong></td>
<td>15</td>
<td>13</td>
<td>22</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>% Female</strong></td>
<td>52</td>
<td>44</td>
<td>61</td>
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</tbody>
</table>
Key Take-A-Ways
Key Take-A-Ways

• *CommuterDirect* users are very satisfied with the service overall
  
  • Timeliness/speed and ease of use are primary benefits
  
  • 2006 changes to the Web site are viewed positively
    
    • Especially improved navigation/ease of use
  
  • *CommuterDirect* has a high percentage of loyal users
    
    • Lack of need/irregular commute are main barriers to increased use
Key Take-A-Ways

• The largest group of users (42%) is paying 100% of cost out of their own pockets

  • Spending with CommuterDirect among those paying out of pocket is significantly lower than others

  • New Account Holders are more likely to pay out of pocket

Implication: One of the keys to long term sales may be making sure the company knows about CommuterDirect or that the individual should tell their company
Key Take-A-Ways

- The renewable order service is widely used and appreciated
  - Average spending is significantly higher among those using renewable service

*Implication: Promoting renewable service (especially to Pay Out of Pocket group) is an opportunity*
Key Take-A-Ways

- 32% of CommuterDirect users do not use CommuterPage.com and as we learned from the CommuterPage study, 75% of their users are unaware of CommuterDirect

*Implication: Cross-selling between CommuterDirect and CommuterPage should be an effective strategy*
Key Take-A-Ways

- Most who have contacted CommuterDirect customer service about a problem had a satisfactory experience
- Fulfillment is an issue for some users
  - Sent late/wrong address
- Fees perceived as too high by many
  - Interest in regular mail option
  - Seen as barrier to using more often

**Implication:** If practical, offering lower cost shipping options may increase frequency of use
Key Take-A-Ways

• CommuterDirect has a very strong net promoter score
  • 2/3 actually have recommended
  • Referrals are a key source of learning about the service

• Users suggest advertising as a good method of attracting others

Implication: Testimonial advertising may be an effective strategy for increasing user base
Key Take-A-Ways

• A very high percentage of respondents began using in the past year
  • Yet sales have only grown 17% over the past year
  • With such high satisfaction numbers, it is difficult to say what causes the churn. We know the area is very transient, but we know that the number of people using transit has been increasing.

  *Implication: Loyalty marketing programs should be considered to improve retention.*

  *Suggest surveying lapsed users to determine why they no longer purchase from CommuterDirect.*
Key Take-A-Ways

- Impact of CommuterDirect is evident in those starting to use/increasing use of alternative modes
  - 31% made change in commute mode
    - 22% said CommuterDirect had an influence
  - 22% in non work travel
    - 35% said CommuterDirect had an influence

*Implication: Although users may have consulted other services to in the process of the decision to switch, the impact of CommuterDirect is undeniable.*
Q 43 From time to time we would like to test new ideas for the site with a panel of people like you. Panel members would share their opinions with us through short email surveys. Would you be interested in possibly participating on such a panel?
Only Slight Demographic Differences Between Panel and Total Respondent Base

<table>
<thead>
<tr>
<th></th>
<th>Total Respondents</th>
<th>Panel Respondents</th>
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<tbody>
<tr>
<td>% Employed</td>
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<td>96</td>
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<tr>
<td>% Drive Alone</td>
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<td>% Commuter Train Users</td>
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<tr>
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<td>28</td>
</tr>
<tr>
<td>% Female</td>
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<td>49</td>
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</tbody>
</table>
Appendix
Comments From Those Who Were Negative About Web site Change

“I do not like having to establish an account. I preferred making one time orders directly, without having an account name and password to remember. I do not want websites to keep my identifying information, particularly my credit card, on file.”

“It is not as intuitive and a bit harder to figure out.”

“Couldn’t find forms to mail in MetroChecks, requires redundant logins”

Q 17c  What specifically is worse?

n = 3
Comments From Those Who Were Neutral on Web site Change

“Transit Pass still a little confusing; I’ve talked to people who aren’t aware that they can get combined VRE/Metro or MARC/Metro monthly pass online and spend/waste money with their monthly train ticket and SmartPass.”

“I haven’t used it much. The main page is certainly less cluttered though. The colors are more appealing too.”

“A bit easier to navigate and check on account status.”

“Make it clearer”

“Make options more clear to first time users”

Q 17d Do you have any comments on the new site?

Asked those saying changes did not make site better or worse

n = 20
Comments From Those Giving Negative Ratings On Navigation

“I have difficulty finding things, even when it’s things I’ve done the previous month.”

“I have to click 10 times to get to the page where I can order.”

“It’s not clear how to proceed.”

“Hard to locate product at first try. Had to make calls to the staff and try under instruction.”
Comments From Those Giving Negative Ratings On Reports

“Reports have improved vastly, but they could still be improved.”

“Past buying history has not been reliable.”

“If I can remember correctly, I cannot view my entire history. I would rethink the presentation of the information.”

As of those giving a 1 or 2 rating on items in Q 20

Q 21 you rated _____ a (1 or 2), why did you give it that rating?
Comments From Those Giving Negative Ratings On Ease of Use

“*It does not clearly state how to use/order.*”

“I find I have to go too deep into the site to get what I need. Too many levels.”

“*Not very user friendly. Hard to find help.*”

As asked of those giving a 1 or 2 rating on items in Q 20

Ease of use

Q 21 you rated _____ a (1 or 2), why did you give it that rating?
Comments From Those Giving Negative Ratings On Information/Content

“Commuter Direct is linked to the transit systems that it serves, but there isn’t much more that is provided about how to use the various transit systems to get where you need to go. For example, I think that CD should be able to tell how to get from Reagan National to BWI taking public transportation.”

Additional information on new options/choices would be nice
Comments From Those Giving Negative Ratings On Visuals/Images

“Really don’t feel there are many visuals or perhaps they may not be relative to what is being promoted”

“Not a lot of pictures on the site.”

“Basic simple graphic. Try using some more Java/ActiveX related info. Make it flashier for the young crowd, BUT have by pass button for us older folk”

Q 21     you rated _____ a (1 or 2), why did you give it that rating?
Summary of Comments From Those Giving Neutral or Positive Ratings On All Items

- Great/good service/general positives - 14
- Easy to use/navigate/user friendly - 7
- No problems/OK - 6
- Confusing at first/hard to what looking for - 4
- Trouble paying/ordering - 4
- No/no comment - 112

Asked of those not giving a 1 or 2 on any item in Q 20
n = 164
Summary of Information, Service or Benefit Provided From CommuterDirect.com That Influenced Change - Work Trip

- Ease of obtaining tickets -4
- Fee/service schedules -4
- Access to various options -3
- Translink cards -3
- Found new information -2

Q22c What information, service, or benefit of CommuterDirect.com influenced or assisted your decision?

Asked of those who reported that CommuterDirect information, service or benefit influenced decision

n = 21
Summary of Information, Service or Benefit Provided From CommuterDirect.com That Influenced Change - Non-Work Trip

- Transit Link/ Unlimited access to Metro - 14
- Links to maps/other sites/trip planning - 4

Asked of those who reported that Commuter Direct information, service or benefit influenced decision

n = 32
Comments From Those Giving Neutral or Positive Ratings On All Fulfillment Items

- Shipping charges to high - 13
- Delivery problems/late - 13
- General positive comments - 11
- Would like option for less expensive shipping/regular mail - 7
- No other comments - 72

Q32b  Would you like to comment on any of the ratings you gave?

n = 120
What is a Loyalist?

- Loyalists are defined as those who only purchase from Commuter Direct, while Non-loyalists also purchase from other areas including WMATA.com. (n = 204)

- Those who also purchase at the stations or The Commuter Store (in addition to Commuter Direct), but no additional places are not included. (n = 87)

As asked of those making a non-work change
n = 98