ACCS 2007 Commuter Store™ Study

FINAL: July 2007

Prepared By

LDA Consulting

Southeastern Institute of Research
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Study Objectives & Methodology
Study Background

- This research study is a component of the 2006-2008 ACCS Program Research and Evaluation Plan.

- The overall 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 establish benchmarks to assess future performance gains.
Study Objectives

- Profile ACCS’ Commuter Stores’ current users.
- Identify what prompted 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 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 previous from different perspectives - by audience sub-segments - e.g., repeat customers vs. first time, etc.
Methodology

• Intercept survey at 3 stores (mobile store excluded)
  - Fieldwork conducted March 27-April 5, 2007
  - Interceptors approached customers as they were leaving the store
  - 1-minute, four-question intercept survey

• Interceptors asked respondents also to take a 10-12 minute online survey
  - $5 Starbucks gift card offered for completing online survey
  - Spanish version of survey available via telephone and a Spanish-speaking agent was stationed at the Ballston Store; ultimately, no one took the survey in Spanish

• Online survey available at in-store computer or off-site
  - Both on-site and off-site respondents reported on the visit at which they were intercepted
  - Intercept questionnaires coded to match the online survey
## Response Breakdown

<table>
<thead>
<tr>
<th>Store</th>
<th># Pre-questionnaires</th>
<th># Online</th>
<th># InStore/OutofStore</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballston</td>
<td>199</td>
<td>171</td>
<td>165/6</td>
</tr>
<tr>
<td>Crystal City</td>
<td>337</td>
<td>200</td>
<td>200/0</td>
</tr>
<tr>
<td>Rosslyn</td>
<td>202</td>
<td>176</td>
<td>174/2</td>
</tr>
<tr>
<td>TOTAL</td>
<td>738</td>
<td>547</td>
<td>539/8</td>
</tr>
</tbody>
</table>

- Given the number of completes per store and differences in Store customer profile, the sample from each store is viewed separately rather than combined into an overall total.
Key Commuter Store-related Findings from 2006 Arlington Resident Study
Recall that in the 2006 Resident Study, About Half Sought Transportation Information

- 52% of all residents sought information on types of transportation they could use and 47% sought transportation services.

- Who sought information?
  - Age 35-49 years old (60%) vs. other ages (51%)
  - Work outside Arlington (56%) vs. work inside (46%)
  - College/advanced degrees (56%) vs. HS or less (34%)
  - Lived in Arlington <10 years (54%) vs. >10 years (48%)
  - Employed and non-employed residents equally likely

Q K-1: In the past year, have you sought information on types of transportation you could use to get around the Washington metropolitan region?
Q K-2 In the past year, have you looked for services that could help you get around the Washington metropolitan region?
6% of Those Who Sought Information Used Arlington Organizations as Info Source

Q K-3: What sources did you use or contact to obtain this information or service?

* = Commuter Store, ACCS, ATP, CommuterPage.com, ART, Arlington government

Arlington Residents
n = 283

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More Than Half of Residents who Sought Information or Services Looked for Schedules

- Transit route/sched: 54%
- Metro fares/passes: 9%
- Travel directions: 7%
- CP/VP info: 3%
- Metrochek/SmarTrip: 2%
- Bike/walk: 2%
- Telecommute: 2%
- Park&Ride: 2%
- Other: 16%
- Yellow pages: 2%
- Other orgs: 3%

Q K-4: What information or services were you seeking?
Four in Ten Residents Who Sought Info/Services Took Action to Change Travel

Q K-5: After obtaining this information or service, did you take any actions to try to change how you travel around Arlington or how you travel from Arlington to other destinations in the Washington metropolitan area?

- Tried bus/train: 15%
- Sought more info from Internet: 9%
- Changed route to work: 5%
- Tried Carpooling: 2%
- Other: 8%

99% said the info/service encouraged this action and 47% said they were “not likely” to have taken the action without the info/service.
2% Knew of the Commuter Store Without Prompting

Q K-8 Do you know of any organizations, phone numbers, or website that provides information on getting around Arlington or around the Washington region?

Arlington Residents n = 201
When Prompted, 44% Said they Knew of The Commuter Store

![Bar Chart]

WMATA: 80%
ART: 46%
Commuter Store: 44%
ACCS: 38%
Commuter Connections: 34%
Bike Arlington: 32%
Walk Arlington: 22%
ATP: 16%
Way to Go: 14%
CommuterPage.com: 13%
CommuterDirect.com: 4%

Q K-8: Now, I’m going to read you a list of organizations and programs that provide transportation information and assistance to Arlington residents. As I read each one, please tell me if you have heard of the organization or service.
The Commuter Store is the Most Used Arlington Transportation Service Organization

One in five residents (21%) used a travel service from an Arlington County/ACCS program in the past year. Employed and non-employed residents equally likely to use Arlington services.

Q K-12 Have you used any services from this organization in the past year?
Survey Respondent Profile
Who Are Commuter Store Patrons?

Traditional Demographics
Commuter Store Customers Tend to be Male

*Ballston Had the Most Female Respondents*

Note: Throughout the presentation, red circles and arrows indicate statistical significance at the 95% level.

Q28: Are you...

<table>
<thead>
<tr>
<th></th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>31%</td>
<td>32%</td>
<td>45%</td>
</tr>
<tr>
<td>Male</td>
<td>53%</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>2%</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Race Does Not Vary Much Among Stores

A Little Over Half Consider Themselves “White”

Q26: Which one of the following best describes your racial background?

- White, non-Hispanic
- African-American or Black
- Asian
- Hispanic or Latino
- Other
- Don't know/No answer

Significantly different from Ballston

Significantly different from Ballston

Significantly different from Ballston
African-Americans are Over-represented While Whites and Hispanics are Under-represented

- **White, non-Hispanic**: 66% (2005 AC Census), 55% (Store AC Residents)
- **African-American or Black**: 9% (2005 AC Census), 25% (Store AC Residents)
- **Asian**: 9% (2005 AC Census), 4% (Store AC Residents)
- **Hispanic or Latino**: 16% (2005 AC Census), 6% (Store AC Residents)

Q26: Which one of the following best describes your racial background?

**AMONG ARLINGTON RESIDENTS ONLY**

05 AC Census: n = 195,800
Store AC Residents: n = 110

All are significantly different with the exception of “Asian.”

2005 Census Data compared with 2007 Commuter Store Study
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Crystal City Customers Tend to Have Higher Incomes than do Customers of Other Stores

Q27: Which category best represents your household’s total annual income?
Lower Income Groups Are Well Represented

Q27: Which category best represents your household’s total annual income? AMONG ARLINGTON RESIDENTS ONLY

- Less than $60,000
  - 2005 AC Census: 28%
  - Survey AC Residents: 37%
- $60,000 - $120K/$124K
  - 2005 AC Census: 31%
  - Survey AC Residents: 21%
- More than $120,000
  - 2005 AC Census: 42%
  - Survey AC Residents: 17%

Note: The Census data goes to $124,000 while the Commuter store data goes to $120,000

05 AC Census
n = 37,578

Survey AC Residents
n = 110
Crystal City Respondents Are More Likely to Be Boomers; Ballston Has More Silent Generation Customers

Q25: Age of respondent - based on What year were you born?

- **Generation Y (25 & younger)**
  - Ballston: 6%
  - Crystal City: 11%
  - Rosslyn: 11%

- **Generation X (ages 26 to 42)**
  - Ballston: 29%
  - Crystal City: 30%
  - Rosslyn: 27%

- **Baby Boomers (ages 43 to 61)**
  - Ballston: 40%
  - Crystal City: 62%
  - Rosslyn: 52%

- **Silent Generation (62 & older)**
  - Ballston: 5%
  - Crystal City: 21%
  - Rosslyn: 8%

- **No answer**
  - Ballston: 3%
  - Crystal City: 1%
  - Rosslyn: 1%

*All three are significantly different*
Crystal City Customers Are More Likely to Be Employed

Q22: What is your current employment status?

All three are significantly different

Employed full time
- Ballston: 67%
- Crystal City: 95%
- Rosslyn: 86%

Employed part time
- Ballston: 9%
- Crystal City: 5%
- Rosslyn: 1%

Not employed
- Ballston: 3%
- Crystal City: 8%
- Rosslyn: 19%

Other
- Ballston: 1%
- Crystal City: 5%
- Rosslyn: 1%

Don't know
- Ballston: 1%
- Crystal City: 0%
- Rosslyn: 1%

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Where Do Commuter Store Patrons Live & Work?

Respondent Zip Code Analysis
Surprisingly, 35% Neither Live Nor Work in Arlington County

More than a third (35%) of all Store users both live and work outside Arlington.

Q20: What is your home zip code?
Q24: What is your work zip code?
Ballston Store Home Zip Codes
Ballston Store Work Zip Codes
Crystal City Store Home Zip Codes
Crystal City Store Work Zip Codes
Rosslyn Store Work Zip Codes
Half of the Ballston Arlington Residents Have Lived There for More than 10 Years

Q21: How long have you lived in Arlington County?

- **Less than 2 years**
  - Ballston: 19%
  - Crystal City: 24%
  - Rosslyn: 43%

- **2 - 5 years**
  - Ballston: 20%
  - Crystal City: 29%
  - Rosslyn: 24%

- **6 - 10 years**
  - Ballston: 13%
  - Crystal City: 14%
  - Rosslyn: 21%

- **More than 10 years**
  - Ballston: 49%
  - Crystal City: 14%
  - Rosslyn: 30%

**CAUTION: SMALL SAMPLE SIZES**
- Ballston: n = 70
- Crystal City: n = 7
- Rosslyn: n = 33
How Do Commuter Store Patrons Commute?

Self-reported Mode Use
Customers Are Overwhelmingly Transit Riders – Fewer than One in Eight Regularly Drive Alone

Q23: What type of transportation do you typically use to get to work?
ASKED ONLY OF THOSE WHO INDICATED THEY ARE EMPLOYED

Note: 28% of those who drive alone were first time visitors. 49% visit the store less often than monthly.

Telework is not included on this slide as only 2 respondents fell into the category.

Ballston
n = 130
Crystal City
n = 193
Rosslyn
n = 160

0% 20% 40% 60% 80% 100%

Drive alone
Commuter train
Metrorail
Bus
Carpool/Vanpool
Walk/Bike
Other

Ballston
Crystal City
Rosslyn

All three are significantly different
But a Third to Almost Half Drive Alone as a Secondary Mode of Transportation

58% of Ballston Customers, 63% of Crystal City Customers, and 69% of Rosslyn Customers use secondary transportation.

Bar chart showing the percentage of customers using different modes of transportation in Ballston, Crystal City, and Rosslyn. The modes include Drive alone, Commuter train, Metrorail, Bus, Carpool, Bike/Walk, and Other. The percentages for each mode are as follows:

- Drive alone:
  - Ballston: 38%
  - Crystal City: 33%
  - Rosslyn: 48%

- Commuter train:
  - Ballston: 4%
  - Crystal City: 7%
  - Rosslyn: 16%

- Metrorail:
  - Ballston: 21%
  - Crystal City: 42%
  - Rosslyn: 59%

- Bus:
  - Ballston: 14%
  - Crystal City: 23%

- Carpool:
  - Ballston: 5%
  - Crystal City: 16%

- Bike/Walk:
  - Ballston: 1%
  - Crystal City: 5%

- Other:
  - Ballston: 4%

Q23A: Do you ever use another type of transportation to get to work, other than the one you just indicated?
Q23B: What other types of transportation do you use?
Secondary Modes Are Generally Used Less than Once per Week

55% of Ballston Customers, 62% of Crystal City Customers, and 47% of Rosslyn Customers use secondary transportation less than once a week.

Note: “Other” not shown, 2% or less for all 3 Stores
Q23C: How often do you typically use any of these other types of transportation to get to work?
How Engaged Are Commuter Store Patrons?

Self-reported store visitation
Most Respondents Are Repeat Customers
And More Than Half Are Loyal to a Particular Store

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

Males are more likely than females to have visited a Commuter Store before (88% vs. 79%).

Baby Boomers (88%) are more likely than Gen X (80%) and Gen Y (74%) to have visited before.

Those who purchased are more likely to have visited before (90% vs. 65%)
Two-thirds Visit at Least Once a Month

65% of Ballston Customers, 70% of Crystal City Customers, and 67% of Rosslyn Customers visit at least once a month.

Q9: How often do you visit this and/or any other Commuter Store in Arlington County (i.e., the Ballston, Rosslyn, Crystal City, and Mobile Commuter Stores)?
4 in 10 Customers Made Their First Visit Within the Last Year

Q10: When did you first visit The Commuter Store?

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

Ballston
n = 144
Crystal City
n = 181
Rosslyn
n = 154

Between 10 and 20 years ago
- Ballston: 8%
- Crystal City: 3%
- Rosslyn: 17%

Between 5 and 9 years ago
- Ballston: 10%
- Crystal City: 14%
- Rosslyn: 35%

Between 1 and 4 years ago
- Ballston: 35%
- Crystal City: 43%
- Rosslyn: 43%

Between 6 and 12 months ago
- Ballston: 10%
- Crystal City: 14%
- Rosslyn: 8%

Between 3 and 6 months ago
- Ballston: 12%
- Crystal City: 10%
- Rosslyn: 9%

Within the past 3 months
- Ballston: 8%
- Crystal City: 9%
- Rosslyn: 16%

First Time
- Ballston: 16%
- Crystal City: 16%
- Rosslyn: 16%

Don't know
- Ballston: 2%
- Crystal City: 3%
- Rosslyn: 3%
## Comparison of Demographics

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
<th>Existing Customers</th>
<th>First-time Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Male</td>
<td>60</td>
<td>53</td>
<td>63</td>
<td>63</td>
<td>62</td>
<td>42</td>
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<tr>
<td>% White</td>
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<td>50</td>
<td>54</td>
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<tr>
<td>Mean Income</td>
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<td>Mean Age</td>
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<td>49</td>
<td>47</td>
<td>45</td>
<td>48</td>
<td>42</td>
</tr>
<tr>
<td>% Employed</td>
<td>88</td>
<td>67</td>
<td>95</td>
<td>86</td>
<td>89</td>
<td>84</td>
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<tr>
<td>% Live but don't work in AC</td>
<td>6</td>
<td>14</td>
<td>1</td>
<td>6</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>% Work but don't live in AC</td>
<td>50</td>
<td>32</td>
<td>68</td>
<td>43</td>
<td>51</td>
<td>42</td>
</tr>
<tr>
<td>% Live and work in AC</td>
<td>9</td>
<td>18</td>
<td>3</td>
<td>8</td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>% Don't live or work in AC</td>
<td>35</td>
<td>35</td>
<td>28</td>
<td>42</td>
<td>34</td>
<td>40</td>
</tr>
<tr>
<td>% Typical Travel Mode - Drive Alone</td>
<td>9</td>
<td>14</td>
<td>5</td>
<td>11</td>
<td>8</td>
<td>23</td>
</tr>
</tbody>
</table>
Initial Store Attraction
The Majority Heard about the Stores Via “Passing by” or Referral

Females are more likely to hear about the Commuter Store from a referral and Males from passing by or a Web site.

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

Note: Map and newsletter not shown, named by 2% or fewer respondents at all stores
First-time Customers More Likely to Have Been Referred than Repeat Customers

Q1: Where did you first hear about The Commuter Store?
The Majority of Customers Go to the Commuter Store to Purchase Fares

- **Needed ticket media**: Ballston 70%, Crystal City 80%, Rosslyn 85%
- **Needed information**: Ballston 9%, Crystal City 13%, Rosslyn 14%
- **Needed schedule/map**: Ballston 0%, Crystal City 7%, Rosslyn 14%
- **Came in to kill time**: Ballston 3%, Crystal City 9%, Rosslyn 19%
- **Want to improve commute**: Ballston 1%, Crystal City 1%, Rosslyn 1%
- **Came in to check it out**: Ballston 1%, Crystal City 1%, Rosslyn 1%
- **Other**: Ballston 4%, Crystal City 9%, Rosslyn 16%

Of those who said “Other,” 2 came for the “friendly staff,” 7 were with or brought colleagues/friends, 3 came specifically for the survey. Generation Y is more likely than older generations to just be killing time (18% vs. 3%).

PQ1: Why did you come into The Commuter Store today?
Not Surprisingly, Repeat Customers Were More Likely to Make a Purchase

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

- Needed ticket media: 82%
- Needed information: 57%
- Needed schedule/map: 29%
- Came in to kill time: 24%
- Want to improve commute: 4%
- Came in to check it out: 1%
- Other: 12%

Repeat Customers: 9% First-time Customers: 12%
Most Choose Stores Based on Location and Convenience

- 46% Near my work
- 29% Near my home
- 15% Only one I know of
- 10% Past experience
- 8% Referral
- 5% Convenience
- 7% Employer referral
- 4% Employer referral
- 2% Other

Females are more likely to chose which Store to visit based on a referral than males (12% vs. 3%).

Generation Y is more likely to chose a Store based on an employer referral than older generations.

Q2: What made you select this particular Store?

- All three are significantly different

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First-time Customers Were More Likely To Choose Which Commuter Store Based on a Referral

Q2: What made you select this particular Store?
More Than Three-quarters Who Visited the Stores Made a Purchase

Note: Some respondents purchased more than one type.

50% of those who say they drive alone for the majority of time, still made a purchase.

59% of First-time Customers made a purchase!

PQ2: Did you make a purchase?
There are Several Differences Between Those Who Purchased and Those Who Did Not

- 83% of Repeat Customers vs. 59% of First-time Customers made a purchase.
- Older generations are more likely to have made a purchase.
  - 62% of Gen Y vs. 79% of Gen X, 82% of Boomers, and 84% of the Silent Generation made a purchase.
- Customers who visit monthly are most likely to have made a purchase.
  - 84% of those who visit more often than monthly, 92% of those who visit monthly, 66% of those that visit less often than monthly, and 59% of first time visitors made a purchase.
- 83% of those who live outside of Arlington vs. 69% of those living in Arlington County made a purchase.
- Income correlates with purchase.
  - 71% of those with incomes under $60K vs. 81% of those with $60K to $120K annual incomes and 88% of those with incomes of $120K or more made purchases.
Purchases Vary By Store

Rosslyn Customers Prefer TLC While Crystal City’s Buy VRE

Note: Some respondents purchased more than one type.

See appendix for breakdown of purchases

Ballston
n = 137
Crystal City
n = 173
Rosslyn
n = 130

PQ2: Did you make a purchase?
More Than Half of First-time Customers Bought a SmarTrip Card

Note: Some respondents purchased more than one type.

PQ2: Did you make a purchase?
PQ2A: Why did you not make a purchase?

Those Who Did Not Purchase Just Didn’t Need Anything

- Did not need anything today: 85% (Ballston), 77% (Crystal City), 82% (Rosslyn)
- Did not find what I was looking for: 0% (Ballston), 2% (Crystal City), 9% (Rosslyn)
- Just needed information: 27% (Ballston), 22% (Crystal City), 0% (Rosslyn)
- Other: 8% (Ballston), 9% (Crystal City), 24% (Rosslyn)

The one respondent who did not find what s/he was looking for was a first-time customer.

Ballston: n = 34
Crystal City: n = 26
Rosslyn: n = 45
Other Reasons Why Customers Did Not Purchase

“didn’t use tokens for purpose intended, needed to return them.” - Rosslyn

“Replacement pouch for SmartCard. They are free.” - Rosslyn

“Exchanged dead fare card.” - Ballston

“Not ready yet.” - Ballston

“Checking things out, comparing fare card options.” - Ballston

“Line was too long; will return later (lunch time).” - Crystal City

“Could not exchange Metro checks to a Smart card.” - Crystal City

PQ2A: Why did you not make a purchase?
Rosslyn Customer Comments
What They Were Looking For But Could Not Find

“Parking meter cards for Metro” (First-time Visitor)

“VRE Pocket time table” (First-time Visitor)

“No. The staff is excellent.”

“VRE pocket timetable”

“No, however this office could not transfer funds from card to card.”

“Bike map not available”

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

“Wanted brochure to go to Ocean City, MD (couldn’t find it)”
“A better Metro system map than the one displayed at the store or divide it up & magnify it to view street names clearer. The one in the store is too fuzzy looking.” (First-time Visitor)

“Step up ticket” (First-time Visitor)

“Info on Mt. Vernon, brochures”

“Out of week-after-next bus pass”

“The store hours are a problem for me. If the hours were from 8 - 9 p.m. that would be great.”

“It would be nice if we could get cards 4 or 5 weeks in advance.”

“Looking for senior smart card but need to apply first.” (First-time Visitor)

“I wish the ART 67 brochure had scheduled pickup times.”

PQ4: 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

“Did not find commuter schedules for buses that come from Waldorf.”
“Did not find bus schedules. Out of schedules.” (First-time Visitor)
“Looking for Amtrak info - local routes.”
“Couldn't find connection.”
“Bought card here. Can't fix problem here.”
“Cannot complete transaction in store.”
“No flyer for Omni ride at Rippon Landing & great staff!”
“Would be nice to have a store in Pentagon City.”
“Out of pamphlets for Transit link cards.”
“Could not transfer Metro fare onto commuter card. Still need to go to Metro station to complete transaction.”
“Didn't know location in Crystal City.”
“New Omni link schedule”
“Fairfax Connector 597 schedule”
“Closed Fredericksburg store - I used to go there.”

PQ4: Was there anything you were looking for that you did not find?
Almost Half Took Information

51% of First-time Customers vs. 42% of Existing customers picked up a schedule (not significant).

50% of females versus 39% of males picked up a schedule.

Those who made purchases are less likely than those who did not to pick up a schedule (37% vs. 68%).

Those who made a change in non-work trips are more likely to pick up a schedule than those who did not (50% vs. 38%).

Q13: Did you pick up a free schedule or brochure?
Collateral Needed Differs By Store

Bus schedule/ART schedule/Metrobus
- Ballston: 30%
- Crystal City: 21%
- Rosslyn: 13%
- Significantly different from Ballston

MARC schedule, VRE, train
- Ballston: 15%
- Crystal City: 13%
- Rosslyn: 9%

Unspecified schedule
- Ballston: 7%
- Crystal City: 13%
- Rosslyn: 9%

Bike map
- Ballston: 8%
- Crystal City: 7%
- Rosslyn: 1%

Metro map
- Ballston: 10%
- Crystal City: 5%
- Rosslyn: 1%

OmniRide schedule
- Ballston: 5%
- Crystal City: 3%
- Rosslyn: 0%

Pocket guide
- Ballston: 2%
- Crystal City: 7%
- Rosslyn: 3%

Zipcar brochure
- Ballston: 0%
- Crystal City: 5%
- Rosslyn: 5%

Fairfax connector
- Ballston: 1%
- Crystal City: 2%
- Rosslyn: 1%

Other
- Ballston: 13%
- Crystal City: 13%
- Rosslyn: 31%

Q13A: What did you pick up?

Note: Some respondents gave multiple responses.

Ballston: n = 76
Crystal City: n = 85
Rosslyn: n = 61
Most Find What They Need at the Commuter Store

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

Note: Some respondents gave multiple responses.

Ballston  
\[n = 91\]  
Crystal City  
\[n = 99\]  
Rosslyn  
\[n = 65\]
Customer Experience
The Store Staff Is an Important Part of Customer Experience

<table>
<thead>
<tr>
<th>Category</th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courteous/friendly staff</td>
<td>27%</td>
<td>42%</td>
<td>53%</td>
</tr>
<tr>
<td>Prompt service</td>
<td>21%</td>
<td>32%</td>
<td>34%</td>
</tr>
<tr>
<td>Good customer service</td>
<td>15%</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>Helpful service</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Availability of material/info</td>
<td>14%</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>Knowledgable staff</td>
<td>9%</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>Efficient service</td>
<td>3%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Pleasant experience</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Professional staff</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Convenient location</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Like the people</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>18%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Q4: Why did you give that rating -n Q3? (open end)

Q3: Think about the experience you just had in the Store today. How would you rate your overall experience in The Commuter Store?

Repeat Visitors were more likely than first-time visitors to say “prompt service” (31% vs. 16%)

Note: Some respondents gave multiple responses.

Ballston: n = 159  
Crystal City: n = 194  
Rosslyn: n = 166

All three are significantly different for these two
Most Ballston Customers Gave High Ratings to Store Attributes
Lower ratings for “convenient hours” and “easy to find”

- Convenient location: 14% strongly agree, 75% agree, 89%
- Easy to find way around: 16% strongly agree, 75% agree, 91%
- Pleasant: 14% strongly agree, 72% agree, 86%
- Right sound: 21% strongly agree, 64% agree, 85%
- Right lighting: 24% strongly agree, 65% agree, 89%
- Convenient hours: 19% strongly agree, 58% agree, 77%
- Easy to find: 24% strongly agree, 54% agree, 78%

Q11a-g: Do you agree with the following statements regarding this particular Commuter Store?
Most Crystal City Customers Gave High Ratings to Store Attributes
Slightly lower ratings for “convenient hours”

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

- Convenient location
  - 15% agree
  - 75% agree
  - 90% agree

- Easy to find way around
  - 17% agree
  - 79% agree
  - 96% agree

- Pleasant
  - 22% agree
  - 70% agree
  - 92% agree

- Right sound
  - 30% agree
  - 58% agree
  - 88% agree

- Right lighting
  - 28% agree
  - 61% agree
  - 89% agree

- Convenient hours
  - 25% agree
  - 60% agree
  - 85% agree

- Easy to find
  - 24% agree
  - 69% agree
  - 93% agree
Most Rosslyn Customers Gave High Ratings to Store Attributes
Slightly lower ratings for “convenient location,” “convenient hours,” and “easy to find”

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Rating 1</th>
<th>Rating 2</th>
<th>Rating 3</th>
<th>Rating 4</th>
<th>Rating 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenient location</td>
<td>9%</td>
<td>74%</td>
<td></td>
<td></td>
<td>83%</td>
</tr>
<tr>
<td>Easy to find way around</td>
<td>13%</td>
<td>79%</td>
<td></td>
<td></td>
<td>91%</td>
</tr>
<tr>
<td>Pleasant</td>
<td>16%</td>
<td>74%</td>
<td></td>
<td></td>
<td>90%</td>
</tr>
<tr>
<td>Right sound</td>
<td>23%</td>
<td>62%</td>
<td></td>
<td></td>
<td>85%</td>
</tr>
<tr>
<td>Right lighting</td>
<td>23%</td>
<td>64%</td>
<td></td>
<td></td>
<td>87%</td>
</tr>
<tr>
<td>Convenient hours</td>
<td>24%</td>
<td>58%</td>
<td></td>
<td></td>
<td>82%</td>
</tr>
<tr>
<td>Easy to find</td>
<td>17%</td>
<td>65%</td>
<td></td>
<td></td>
<td>82%</td>
</tr>
</tbody>
</table>

Q11a-g: Do you agree with the following statements regarding this particular Commuter Store?
Repeat Customers Have Found Ways to Make the Store Hours Work for Them

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

- Convenient location: 88% Repeat, 84% First-time
- Easy to find way around: 93% Repeat, 88% First-time
- Pleasant: 90% Repeat, 85% First-time
- Right sound: 87% Repeat, 81% First-time
- Right lighting: 88% Repeat, 84% First-time
- Convenient hours: 67% Repeat, 84% First-time
- Easy to find: 86% Repeat, 79% First-time
A Few Might Have Misunderstood the Ratings as Comments Did Not Match

34 gave “convenient to work or home” a 1 or 2 rating, but 10 of these respondents indicated the Store is convenient in Q12

20 gave “easy to find way around” a 1 or 2 rating, but 7 indicated the Store is well laid out in Q12

23 gave “pleasant to shop” a 1 or 2 rating, but 8 indicated the Store and staff are pleasant.

23 gave “noise level about right” a 1 or 2 rating, but 10 indicated the Store does have a good noise level.

19 gave “lighting level about right” a 1 or 2 rating, but 6 indicated the Store does have a good lighting level.

27 gave “pleasant to shop” a 1 or 2 rating, but 5 indicated the Store hours are convenient.

42 gave “easy to find way around” a 1 or 2 rating, but 7 indicated the Store is easy to find in Q12

Q12: You rated ________ a [1 or 2], why did you give that rating?
But a Few Did Have Negative Comments about the Store

Several comments about needing Stores in DC and Maryland.
Some comments about wanting the stores to open earlier or stay open later.

“It is small store with only one counter. I didn’t really shop, I only asked questions. The information I wanted was not available at the store.” - Crystal City

“Lighting is poor.” - Ballston

“Woman is consistently rude.” - Rosslyn

“Not enough staff.” - Ballston

“Impersonal. Location noisy. Lights to low for reading schedules.” - Rosslyn

“Lot of background noise from monitors.” - Crystal City

“Aloot of outside noise filters in while I was talking to the staff. I had to ask them repeat their answer.” - Crystal City

“Needs to be brighter, hard to read some material.” - Crystal City

“Occasionally, the store closes during lunch hour, or right at 4pm - the only two times I can visit the store to make my purchase.” - Ballston

Q12: You rated _________ a [1 or 2], why did you give that rating?
68% of Ballston, 56% of Crystal City, and 35% of Rosslyn customers did not have comments to make on their ratings.

Note: Some respondents gave multiple responses.

<table>
<thead>
<tr>
<th>Comment</th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store needs to open earlier</td>
<td>7%</td>
<td>7%</td>
<td>13%</td>
</tr>
<tr>
<td>Need DC location</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Needs better lighting</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Convenient location</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Staff courteous/friendly</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Store is great</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Helpful service</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Had pleasant experience</td>
<td>6%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Good customer service</td>
<td>6%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Other responses</td>
<td>21%</td>
<td>16%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Q12A/B. Would you like to (make any other) comment(s) on (any of) the ratings you gave?

Significantly different from Ballston

Ballston  
\( n = 85 \)

Crystal City  
\( n = 98 \)

Rosslyn  
\( n = 69 \)
The Commuter Store Staff
Most Ballston Customers Agree With These Positive Statements About Commuter Store 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?
Most Crystal City Customers Agree With These Positive Statements About Commuter Store 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?

- Professional: 20% agree, 74% strongly agree, 94% overall agreement
- Knowledgable: 22% agree, 74% strongly agree, 96% overall agreement
- Helpful: 18% agree, 78% strongly agree, 96% overall agreement
Most Rosslyn Customers Agree With These Positive Statements About Commuter Store 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?
A Few Might Have Misunderstood the Ratings as Comments Did Not Match

- 17 gave “professional” a 1 or 2 rating, but 5 indicated the staff is professional in Q16
- 16 gave “knowledgeable” a 1 or 2 rating, but 4 indicated the staff is knowledgeable in Q16
- 20 gave “helpful” a 1 or 2 rating, but 4 indicated the staff is helpful in Q16

Q12: You rated ________ a [1 or 2], why did you give that rating?
But Some Did Have Negative Comments about the Staff

“Staff not customer friendly…very confrontational instead of willing to show a desire to be helpful. No could help me when I asked questions about several products and bus schedules. Staff are not willing to help customer/me at the appropriate level.” - Crystal City

“The young man is not so much rude as disinterested.” - Rosslyn

“On phone when I was waiting.” - Ballston

“No personality. Didn't offer any info. Didn't help decide what product was needed.” - Rosslyn

“she seemed new. She didn't know the routes. I could not get the info I needed.” - Ballston

“Because of the rude woman who works here” - Crystal City

Q12: You rated ________ a [1 or 2], why did you give that rating?
Most Did Not Have Comments On Their Ratings

- Staff courteous/friendly: Ballston 4%, Crystal City 6%, Rosslyn 21%
- Helpful service: Ballston 5%, Crystal City 7%, Rosslyn 13%
- Good customer service: Ballston 4%, Crystal City 8%, Rosslyn 5%
- Knowledgable staff: Ballston 1%, Crystal City 3%, Rosslyn 10%
- Had pleasant experience: Ballston 1%, Crystal City 3%, Rosslyn 5%
- Other responses: Ballston 10%, Crystal City 12%, Rosslyn 18%

Q16A/B. Would you like to (make any other) comment(s) on (any of) the ratings you gave?

76% of Ballston, 64% of Crystal City, and 43% of Rosslyn customers did not have comments to make on their ratings.

Note: Some respondents gave multiple responses.

Significantly different from Ballston

Ballston n = 80
Crystal City n = 89
Rosslyn n = 61
Commuter Store Customer Satisfaction
More Than 90% Had a Good Experience!

91% of Ballston Customers, 97% of Crystal City Customers, and 96% of Rosslyn Customers had a good experience in The Commuter Store.

Q3: Think about the experience you just had in the Store today. How would you rate your overall experience in The Commuter Store?
There are a Few Differences Between Satisfied and Unsatisfied Customers

- **First-time Visitors** - 11 of the 28 people who gave a 1, 2, and 3 in satisfaction were first time visitors. And 10 of them gave the store a “3.”

- **Non-Employed** - 11% of those who are not employed gave a 1, 2, or 3 in satisfaction vs. only 4% of those who are employed. This is statistically significant.

- Satisfaction does not appear to have an effect on The Commuter Store’s impact on travel for work or non-work reasons.
Most Are Likely to Recommend The Commuter Store

84% of Ballston Customers, 88% of Crystal City Customers, and 91% of Rosslyn Customers are likely to recommend The Commuter Store.

Q5: How likely would you be to recommend The Commuter Store to someone who needs information or products related to traveling around Arlington County?

91% of those who work in Arlington vs. 84% of those who do not are likely to recommend. 14% of those with income of $60K to $120K are unlikely to recommend vs. 6% of those with higher incomes.
The “Net Promoter Score”

- The Net Promoter Score is defined as

  The percentage of promoters (somewhat/very likely to recommend) 88% (all respondents)

  Less:

  The percentage of detractors (somewhat/very unlikely to recommend) 10%

  Net Promoter Score 78%

- As a comparison, according to Satmetrix, selected companies have Net Promoter Scores as follows:
  - USAA - 82%
  - Amazon - 73%
  - Costco - 79%
  - Chick-Fil-A - 72%
### Q6: How likely are you to visit a Commuter Store in the future?

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very likely</td>
<td>77%</td>
<td>92%</td>
<td>85%</td>
</tr>
<tr>
<td>Somewhat likely</td>
<td>14%</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Neither</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Somewhat unlikely</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Very unlikely</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

91% of Ballston Customers, 95% of Crystal City Customers, and 93% of Rosslyn Customers are likely to return to The Commuter Store.

Significantly different from Ballston.
Intent To Return is Significantly Affected By Different Characteristics

- Purchase during visit does not impact intent to return - 95% of those who made a purchase during that visit vs. 94% of those who did not are likely to return.

- Frequency of visit is positively correlated with intent to return:
  - 86% of those who visit less often than monthly intend to return.
  - 100% of those who visit monthly intend to return.

- 95% of Metrorail/rail riders vs. 87% of those who drive alone intend to return.
The 13 Who Said They Will Not Return Had Various Reasons

- 6 do not need any more services
  - 3 in Ballston
  - 2 in Crystal City
  - 1 in Rosslyn

- 2 were just checking it out
  - 2 in Ballston
  - 0 in Crystal City
  - 0 in Rosslyn

- 2 do not live or work near a Store
  - 1 in Ballston
  - 0 in Crystal City
  - 1 in Rosslyn

- 3 had other reasons
  - 2 in Ballston
  - 1 in Crystal City
  - 0 in Rosslyn

Q6A: Why are you unlikely to return?
Impact of The Commuter Store™
32% Have Made a Change in Work Travel Since First Visiting The Commuter Store

53% of those who made a change in how they travel to work vs. 39% of those who did not, make purchases from other sources.

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

Q17: Since you first visited The Commuter Store, have you made any of the following changes in how you travel to work? ASKED ONLY OF THOSE WHO SAID THEY MADE A CHANGE

- Started riding train or bus
- Ride train or bus more often
- Started car/vanpooling to work
- Car/vanpool more often
- Started walking or bicycling
- Bicycle or walk more often
- Started teleworking
- Telework more often

Those who work in Arlington were significantly more likely than those who do not to have started carpooling (2% vs. 0%).

Note: Some respondents gave multiple responses.

Ballston
n = 48

Crystal City
n = 75

Rosslyn
n = 54
Most Who Changed Work Travel Previously Drove Alone

Q17A: How did you typically travel to work before you made this change?

- Drove alone all or most days
  - Ballston: 65%
  - Crystal City: 67%
  - Rosslyn: 66%

- Rode a train or bus all or most days
  - Ballston: 19%
  - Crystal City: 28%
  - Rosslyn: 28%

- Car/Vanpooled all or most days
  - Ballston: 3%
  - Crystal City: 7%
  - Rosslyn: 0%

- Walked all or most days
  - Ballston: 4%
  - Crystal City: 4%
  - Rosslyn: 4%

- Bicycled all or most days
  - Ballston: 0%
  - Crystal City: 0%
  - Rosslyn: 0%

- Didn't work then/worked in another area
  - Ballston: 11%
  - Crystal City: 21%
  - Rosslyn: 0%

- Other responses
  - Ballston: 7%
  - Crystal City: 0%
  - Rosslyn: 0%

Ballston: n = 26
Crystal City: n = 45
Rosslyn: n = 29
Q18: Since you first visited 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
  - Ballston: 35%  
  - Crystal City: 28%  
  - Rosslyn: 35%

- Did not make a change
  - Ballston: 58%  
  - Crystal City: 69%  
  - Rosslyn: 60%

- Don’t know/no answer
  - Ballston: 7%  
  - Crystal City: 4%  
  - Rosslyn: 5%

Note: Includes 8 people who said it was their first visit, even though they had given a different response in Q17.
Again, Most Changes Involved Transit Use

Q18: Since you first visited 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? ASKED ONLY OF THOSE WHO SAID THEY MADE A CHANGE

Note: Some respondents gave multiple responses.

Ballston  
n = 53
Crystal City  
n = 52
Rosslyn  
n = 57
Residents Are Less Likely to Have Made a Non-Work Change

Q18: Since you first visited 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?

- Started riding train or bus: 11% Arlington Resident, 8% Non Resident
- Ride train or bus more often: 16% Arlington Resident, 16% Non Resident
- Started car/vanpooling to work: 0% Arlington Resident, 2% Non Resident
- Car/vanpool more often: 1% Arlington Resident, 1% Non Resident
- Started walking or bicycling: 3% Arlington Resident, 0% Non Resident
- Bicycle or walk more often: 5% Arlington Resident, 2% Non Resident
- Did not make a change: 46% Arlington Resident, 61% Non Resident
- Don’t know/no answer: 16% Arlington Resident, 12% Non Resident

Southeastern Institute of Research
Those Who Made a Commute Change Tend To Find it More Difficult to Get Around

This holds true for those who made non-work changes, but only the difference for “getting around without a car” is significant (42% vs. 32%).

Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.
The “Competition”
Slightly Less than Half Purchase Ticket Media from Places Other than The Commuter Store

Q7: Do you purchase transit passes, tokens, or tickets through any sources other than The Commuter Store?

Note: Some respondents gave multiple responses.

The younger the customer, the lower their income, and the less often they visit, the more likely they are to purchase ticket media from other sources. Those who do not live and those who do not work in Arlington are more likely to purchase through other sources than their counterparts.
Q8: Do you look for local travel information through any sources other than The Commuter Store?

Two-thirds Look for Travel Information in Places Other than The Commuter Store

- Only through Commuter Store: 14% (Ballston), 22% (Crystal City), 40% (Rosslyn)
- WMATA.com: 26% (Ballston), 23% (Crystal City), 25% (Rosslyn)
- Train station or bus stop: 24% (Ballston), 23% (Crystal City), 22% (Rosslyn)
- Another Web site: 12% (Ballston), 23% (Crystal City), 22% (Rosslyn)
- Friends/Family/Co-Workers: 15% (Ballston), 13% (Crystal City), 12% (Rosslyn)
- CommuterPage.com: 9% (Ballston), 12% (Crystal City), 18% (Rosslyn)
- CommuterDirect.com: 6% (Ballston), 12% (Crystal City), 18% (Rosslyn)
- Employer: 5% (Ballston), 5% (Crystal City), 5% (Rosslyn)
- Other: 1% (Ballston), 1% (Crystal City), 2% (Rosslyn)
- Do not look for info: 14% (Ballston), 13% (Crystal City), 17% (Rosslyn)

The younger the customer, the more likely they are to look for travel info from other sources. Those who do not live and those who do not work in Arlington are more likely to look for travel info from other sources. Those who are employed are more likely to look for travel info from other sources. Those who purchase from other sources are more likely than those who only purchase from The Commuter Store to look for info elsewhere (81% vs. 55%).

Note: Some respondents gave multiple responses.
Not Surprisingly, Loyalists Are More Satisfied

Q3: Think about the experience you just had in the Store today. How would you rate your overall experience in The Commuter Store?

Shoppers are defined as those who said they also purchase transit passes from other locations in Q7.

Loyalists said they only purchase transit passes through The Commuter Store.

Neither are significantly more likely to recommend The Commuter Store.

Q7.
Long-time Customers are More Loyal

65% of Loyalists Have Been Commuter Store Customers for at Least a Year Compared with 50% of Shoppers

Q10: When did you first visit The Commuter Store?

Shoppers are defined as those who said they also purchase transit passes from other locations in Q7.

Loyalists said they only purchase transit passes through The Commuter Store.
ACCS Customer Panel
Q29: 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?
100 Respondents Would Like to Join the Commuter Stores Marketing Feedback Panel

100 New Panelists

- **Ballston**: 31 people (18%)
- **Crystal City**: 32 people (16%)
- **Rosslyn**: 37 people (21%)

Note: 124 customers (42 Ballston, 39 Crystal City, 43 Rosslyn) actually said yes to Q29, but only 100 provided an email address.

Q29: Would you be interested in possibly participating on such a panel?
Q30: [IF YES] Please provide your email.
## Panel Demographics

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Panel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good/Excellent experience</td>
<td>94%</td>
<td>93%</td>
</tr>
<tr>
<td>Likely to return</td>
<td>93%</td>
<td>98%</td>
</tr>
<tr>
<td>Visit at least monthly</td>
<td>67%</td>
<td>70%</td>
</tr>
<tr>
<td>Customer for a year or more</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>Arlington Resident</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Arlington Employment</td>
<td>51%</td>
<td>56%</td>
</tr>
<tr>
<td>At least 2 years in AC</td>
<td>77%</td>
<td>70%</td>
</tr>
<tr>
<td>Employed</td>
<td>55%</td>
<td>92%</td>
</tr>
<tr>
<td>Primary mode - Drive alone</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Mean age</td>
<td>47</td>
<td>46</td>
</tr>
<tr>
<td>Race - White, non-Hispanic</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Mean annual income</td>
<td>$96K</td>
<td>$101K</td>
</tr>
<tr>
<td>Female</td>
<td>36%</td>
<td>41%</td>
</tr>
</tbody>
</table>
Key Take-A-Ways
Increase Awareness of The Commuter Store™
Is Low Resident Use Due to Low Awareness or Low Need?

- The majority of Store customers are not Arlington residents - current base is primarily Arlington employees who live outside Arlington.
- Most Store users learned about Store by passing by or word of mouth/referral.
- 2006 AC resident study showed that:
  - Resident awareness of Stores was 2% unaided and 44% aided. Awareness was higher than for other Arlington orgs, but much less than awareness for WMATA (80%).
  - More than half of residents sought travel info or services in past year - primarily transit info (30% of residents) or transit passes (5%).
  - Internet was primary source (44%); 6% who sought info named Arlington org as source. But when asked directly, 11% said they used Commuter Store service in past year.
Once They Get to the Store, Good Things Happen

- Store user customer satisfaction is very high - more than 90% of customers surveyed reported a good experience.
  - But Rosslyn and Ballston customers gave slightly lower ratings to store hours and ease of finding stores. Do these features make the Stores less available or less visible to residents?
- 59% of first-time visitors made a purchase.
- A third of Commuter Store customers have made changes in the way they commute or make non-work trips (many from DA to transit).
- 28% of those who drive alone were first time visitors versus 21% of those who Car/Vanpool, 10% of those who ride the Bus, and 8% of those who ride Rail.
Increasing awareness of The Commuter Stores would lead to more usage, more satisfaction, more ticket sales, and less driving alone.
Solidify Your Brand Proposition
Make The Commuter Store *The* Place to Go for Commuters and Residents

- Become more action oriented in store communication.

- Focus on fare media that is difficult to get elsewhere. The Commuter Store has everything, but this message may be overwhelming for customers.

- Use customer testimonials and play up customer service.

- The Stores are an avenue for serving underserved markets, an idea which can be built upon.
For Additional Information on this Study Contact:

Christy Evanko
Southeastern Institute of Research
804-358-8981
## Ballston Store Home Zip Codes

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**Arlington Zip Codes**
Arlington County Zip Codes - Work

Q24: What is your work zip code?

Ballston is in 22203, Crystal City is in 22202, and Rosslyn is in 22209
Q20: What is your home zip code?

Ballston is in 22203, Crystal City is in 22202, and Rosslyn is in 22209
Breakdown Of Purchases

<table>
<thead>
<tr>
<th>SmarTrip</th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
</tr>
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<tbody>
<tr>
<td>SmarTrip card</td>
<td>20</td>
<td>9</td>
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<td>Transit Link</td>
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<td>TLC</td>
<td>14</td>
<td>16</td>
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<td>Metrorail</td>
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<tr>
<td>7-Day Fast Trip Pass</td>
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<td>7-Day Short Trip Pass</td>
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<tr>
<td>Metrorail farecard</td>
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<tr>
<td>Metrorail</td>
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<td></td>
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</tr>
<tr>
<td>Bus (non specific)</td>
<td>23</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Metrorail Weekly Pass</td>
<td>5</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Unspecified Metro</td>
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<td></td>
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</tr>
<tr>
<td>Metro (non specific)</td>
<td>9</td>
<td>3</td>
<td>0</td>
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<td>Metrorail Flash</td>
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<td>0</td>
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<td>Metrorail tokens</td>
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<td>1</td>
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<td>MARC</td>
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<tr>
<td>MARC (non-specific)</td>
<td>10</td>
<td>13</td>
<td>11</td>
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<tr>
<td>Penn MARC</td>
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<td>2</td>
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<tr>
<td>VRE</td>
<td></td>
<td></td>
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<tr>
<td>VRE - Ten-trip Ticket</td>
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<td>1</td>
<td>0</td>
</tr>
<tr>
<td>VRE - non-specific</td>
<td>3</td>
<td>71</td>
<td>6</td>
</tr>
<tr>
<td>VRE - The Monthly Ticket</td>
<td>0</td>
<td>12</td>
<td>1</td>
</tr>
</tbody>
</table>

| Unspecified Rail          |          |              |         |
| One Day Rail Pass         | 1        | 0            | 0       |
| Rail/train (non specific) | 2        | 2            | 0       |
| Omniride                  |          |              |         |
| Omniride tokens/Omnilink  | 5        | 5            | 5       |
| Discounted Fares          |          |              |         |
| Metrobus Flash (disabled or senior) | 1 | 0 | 0 |
| Metrobus Weekly Disabled or Senior Pass | 3 | 0 | 0 |
| Senior/Disabled Rail Farecard | 5 | 1 | 2 |
| Senior/disabled/other discount (not specific) | 11 | 4 | 6 |
| STAR 2Bucks               | 2        | 0            | 1       |
| Super Senior Taxi         | 2        | 1            | 0       |
| Other                     |          |              |         |
| Arlington County ParkSmart card | 1 | 3 | 2 |
| Commuter Card (non-specific) | 0 | 3 | 0 |
| Farecard (not specified)  | 2        | 0            | 0       |
| Georgetown Bus Pass       | 0        | 0            | 3       |
| Monthly (non-specific)    | 0        | 5            | 0       |
| Other                     | 3        | 8            | 5       |
| Tokens (unspecific)       | 3        | 13           | 8       |
| Unlimited Monthly Ticket  | 1        | 0            | 2       |
| Weekly pass (not specific)| 4        | 0            | 1       |

PQ2: Did you make a purchase?
“The location of the store is convenient to my work or home.”

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

MEANS:
Ballston - 4.5
Crystal City - 4.6
Rosslyn - 4.5
“It’s easy to find my way around in the store.”

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

MEANS:
Ballston - 4.6
Crystal City - 4.7
Rosslyn - 4.7
“It is a pleasant store to shop.”

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

MEANS:
Ballston - 4.5
Crystal City - 4.6
Rosslyn - 4.6

LDA CONSULTING
Southeastern Institute of Research
“The sound level is about right.”

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

MEANS:
Ballston - 4.5
Crystal City - 4.5
Rosslyn - 4.4

[Bar chart showing agreement levels for Ballston, Crystal City, and Rosslyn for Q11a-g statements]
“The lighting is about right.”

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

- **5 - Strongly agree**:
  - Ballston: 65%
  - Crystal City: 61%
  - Rosslyn: 64%
- **4**:
  - Ballston: 24%
  - Crystal City: 23%
  - Rosslyn: 28%
- **3**:
  - Ballston: 5%
  - Crystal City: 10%
  - Rosslyn: 9%
- **2**:
  - Ballston: 1%
  - Crystal City: 0%
  - Rosslyn: 0%
- **1 - Strongly disagree**:
  - Ballston: 5%
  - Crystal City: 2%
  - Rosslyn: 1%
- **Don't know**:
  - Ballston: 1%
  - Crystal City: 0%
  - Rosslyn: 1%

**MEANS:**
- Ballston: 4.4
- Crystal City: 4.5
- Rosslyn: 4.4
“The store hours are convenient for my schedule.”

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

MEANS:
Ballston - 4.3
Crystal City - 4.4
Rosslyn - 4.4
“The store is easy to find.”

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

MEANS:
Ballston - 4.1
Crystal City - 4.5
Rosslyn - 4.4
“The staff is professional.”

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?

MEANS:
Ballston - 4.6
Crystal City - 4.7
Rosslyn - 4.7
“The staff is knowledgeable about products and information provided.”

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?

MEANS:
Ballston - 4.6
Crystal City - 4.7
Rosslyn - 4.7

Significantly different from Ballston

Significantly different from Ballston
“The staff is 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?

MEANS:
Ballston - 4.6
Crystal City - 4.7
Rosslyn - 4.7

Significantly different from Ballston
70% of Ballston Customers Find it Easy to Get Around Arlington by Metrorail

<table>
<thead>
<tr>
<th>Method</th>
<th>Without a car</th>
<th>With a car</th>
<th>Walking</th>
<th>By bus</th>
<th>By Metrorail</th>
<th>Biking</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>12%</td>
<td>20%</td>
<td>19%</td>
<td>21%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>5 - Very easy</td>
<td>25%</td>
<td>33%</td>
<td>24%</td>
<td>40%</td>
<td>49%</td>
<td>14%</td>
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</tbody>
</table>

Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

42% said “Don’t know”
76% of Crystal City Customers Find it Easy to Get Around Arlington by Metrorail

*But Most Do Not Find It Easy to Get Around By Other Methods*

Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

- **Without a car**
  - 17% 4
  - 16% 5
  - 33% 4

- **With a car**
  - 19% 4
  - 17% 5
  - 36% 4

- **Walking**
  - 12% 4
  - 19% 5
  - 31% 4

- **By bus**
  - 17% 4
  - 18% 5
  - 35% 4

- **By Metrorail**
  - 37% 4
  - 39% 5
  - 76% 4

- **Biking**
  - 7% 4
  - 12% 5
  - 19% 4

37% said “Don’t know”

52% said “Don’t know”
68% of Rosslyn Customers Find it Easy to Get Around Arlington by Metrorail
But Most Do Not Find It Easy to Get Around By Other Methods

Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

- Without a car: 18% (4), 18% (5)
- With a car: 19% (4), 15% (5)
- Walking: 16% (4), 22% (5)
- By bus: 13% (4), 19% (5)
- By Metrorail: 26% (4), 42% (5)
- Biking: 9% (4), 17% (5)

38% said “Don’t know”
51% said “Don’t know”
“Without a car, SUV, van, or truck?”

Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

MEANS:
- Ballston - 3.2
- Crystal City - 3.2
- Rosslyn - 3.4
“With a car, SUV, van or truck?”

MEANS:
Ballston - 3.8
Crystal City - 3.4
Rosslyn - 3.3

Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

All three are significantly different
Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

MEANS:
Ballston - 3.4
Crystal City - 3.3
Rosslyn - 3.5
Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

MEANS:
- Ballston: 4.1
- Crystal City: 3.7
- Rosslyn: 3.6

By bus?

Don’t know: 37% (Ballston), 38% (Crystal City), 38% (Rosslyn)

1 - Very difficult
- Ballston: 2%
- Crystal City: 2%
- Rosslyn: 2%

2 - Significantly different from Ballston
- Ballston: 9%
- Crystal City: 7%
- Rosslyn: 4%

3 - Significantly different from Ballston
- Ballston: 20%
- Crystal City: 18%
- Rosslyn: 19%

4 - 17%

5 - Very easy
- Ballston: 18%
- Crystal City: 19%
- Rosslyn: 15%

Significantly different from Ballston
“By Metrorail?”

Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

MEANS:
Ballston - 4.2
Crystal City - 4.2
Rosslyn - 4.2
MEANS:
Ballston - 3.3
Crystal City - 3.3
Rosslyn - 3.6

Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

“By bicycle?”