ACCS
2008 CommuterDirect.com Study
Corporate Version

July 2008
Prepared By

CommuterDirect.com® Easy Commutes Begin Here®

Southeastern Institute of Research

LDA Consulting
Table of Contents

• Study Background, Objectives, and Methodology
• Respondent Comparison with Sample
• TDM Services/Transit Benefits Offered
• Third-party Administrator Motivations
• Reasons Clients Choose CommuterDirect.com
• Setting up CommuterDirect.com
• Operating Features
  - Web site
  - Renewable Order Service
  - Reporting Feature
  - Fulfillment
• Likes & Dislikes
• Performance Ratings
• CommuterDirect.com Potential
• How to Grow CommuterDirect.com
• Key Take-A-Ways
Background, Objectives & Methodology
Background

- The 2008 CommuterDirect.com Corporate Study is a component of the 2006-2008 ACCS Program Research and Evaluation Plan.
- A companion study of individuals that use CommuterDirect.com was performed in 2007.
- The purpose of this research study is the collect and analyze information among corporate clients to:
  - Help refine and improve the overall CommuterDirect.com program.
  - Establish benchmarks from which future performance gains can be made.
Objectives

• Determine why clients use a third-party administrator, why they use CommuterDirect Corporate Services over another similar service(s)
• Determine why clients offer transit benefits and what other benefits they offer
• Gauge use and satisfaction with CommuterDirect.com
  - Service overall
  - Reporting feature
  - Renewable orders
  - One-time orders
• Understand any services issues or gaps
• Determine how the overall service can be improved
Methodology

• A list of 80 current CommuterDirect.com corporate clients was used for a telephone survey conducted between May 14 and June 2, 2008.

• Clients were contacted during business hours and offered a $15 Starbucks card for their participation.
  - Multiple calls were made to some clients to ensure as many responses as possible.

• Total number of completed surveys - 44 (55% response rate).
Research Interpretation Caution!

While the number of total respondents represents 55% of the CommuterDirect.com corporate client population, the sample size, in proportion to the total universe, is still too small to project to the universe with statistical certainty. This understood, the data and related interpretations presented in this deck should be viewed as directional.
Respondent Comparison with Sample
Research Interpretation Caution!

There is always some level of built-in research bias in terms of the types of people who respond to surveys. Using ACCS client data, we have tied the respondents in this survey back to the original sample to showcase any differences. This does not, however, invalidate the directional findings.
Most Employers in the Sample Have Few Employees - This Mirrors the Overall Population of Corporate Clients

Source: CommuterDirect.com Database
Again, the sample closely follows the actual population pattern in terms of start of service.

Source: CommuterDirect.com Database
Slightly More than Half Receive Shipments at the Office, the Rest Have Shipments Sent to Employees’ Homes

Source: CommuterDirect.com Database
Most Clients are Listed as Payroll Deduction and the Sample Follows This

Source: CommuterDirect.com Database
But When Asked About How the Organization Funds Transit Benefits, Respondents Paint a Different Picture

Q20: Does your organization fund the transit benefits or use payroll deduction?

- Company funds all: 41% (18 respondents)
- Employees pay and are reimbursed: 1% (1 respondent)
- Mix of the two: 23% (10 respondents)
- Payroll deduction funds all: 34% (15 respondents)

Chart shows actual number of respondents out of a possible 44 total.
Respondent Comments - Why?

- Company Funds All
  
  “It is mandated by the county.”

  “It’s because the government allows it so why not take advantage of the funding.”

  “It is an incentive for people to use it.”

  “We are going green and trying to ease the density and congestion.”

  “It’s just an employee benefit to stand out from other companies that don’t have it. We pay 100% as fringe benefits to make us stand out, because we’re a very green company. We should have more transportation options to discourage people from using the automobile.”

Q20A: Why is that?
Respondent Comments - Why?

- **Mix of the Two**
  
  “The tax deductible benefits do not cover it all.”

  “If it goes over the legal limit then the rest of the cost comes from payroll.”

  “We are a small office with small profits. We choose to reimburse employees and reduce the parking by giving an equal amount of what we pay for parking spaces.”

- **Payroll Deduction Funds All**

  “It’s just easier that way.”

  “We are too small of a company to pay for it.”

  “It’s to give the employee a tax benefit. Part of our benefits package is to give the employee a parking spot.”

  “That’s what the employees wanted.”

  “They pay for other things besides transit.”

Q20A: Why is that?
CommuterDirect.com
Clients Offer An Array of TDM Services
They Are In The Game
Does your company provide any of these transportation benefits to employees in addition to transit fares?
Flex-time Tops the List of Other Benefits Provided to Employees

Q18: Does your company provide any of these transportation benefits to employees in addition to transit fares?

- Flex-time: 52%  (23 respondents)
- Teleworking - informal: 43%  (19 respondents)
- Bike lockers/racks: 41%  (18 respondents)
- Info on alternate transportation: 36%  (16 respondents)
- Teleworking - formal: 34%  (15 respondents)
- Info Display: 30%  (13 respondents)
- On-site events: 27%  (12 respondents)
- Compressed work week: 25%  (11 respondents)
- Transit schedules: 23%  (10 respondents)
- Carpool/Vanpool parking: 18%  (8 respondents)
- Ridematching: 14%  (6 respondents)
- Carpool/Vanpool financial incentive: 9%  (4 respondents)

Chart shows actual number of respondents out of a possible 44 total.
Q18: Does your company provide any of these transportation benefits to employees in addition to transit fares?

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

ATP Client Study QC1: Check all the services or benefits that are available to your employees. For those that are not available now, indicate if you would consider or would not consider offering it.
Client Motivators In Offering Transit Benefits
Clients Offer Transit Benefits Even Though Parking is Adequate for Most

But this doesn’t mean every employee who wants a parking space could have one. Some employees who want to drive, but don’t have company-provided parking might be parking off-site. Additionally, parking might be “adequate” in part because the transit subsidy is offered, encouraging some employees who might otherwise drive to shift to transit.

Q54: Is parking adequate to meet employees’ parking needs?
Almost Half Say Their Employees Have Free Parking

<table>
<thead>
<tr>
<th>Option</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, parking is free</td>
<td>20</td>
<td>45%</td>
</tr>
<tr>
<td>Charge for on-site, company owned</td>
<td>12</td>
<td>27%</td>
</tr>
<tr>
<td>Charge for public lot</td>
<td>12</td>
<td>27%</td>
</tr>
<tr>
<td>Charge for street parking</td>
<td>2</td>
<td>4%</td>
</tr>
<tr>
<td>Charge for off-site, company owned</td>
<td>1</td>
<td>2%</td>
</tr>
<tr>
<td>Don't know</td>
<td>1</td>
<td>2%</td>
</tr>
</tbody>
</table>

Chart shows actual number of respondents out of a possible 44 total.

But, again, this doesn’t necessarily mean every employee has free parking. This could mean only that employers do not charge for parking when they offer it. But some clients might not provide parking for all employees.

Q55: Do employees pay a charge to park in any of these locations?
Half Of Those Organizations Without Free Parking Give Some Assistance

Q56: Does your organization pay part or all of the parking cost for employees? ASKED ONLY OF THOSE WHO DO NOT HAVE FREE PARKING

Chart shows actual number of respondents out of a possible 23 total.

Those who do not have free parking n = 23
The Majority Offer Transit Benefits to Improve Morale
But Almost Half Are Committed to Easing Traffic and Environmental Concerns

Q19: For what reasons does your company offer transit benefits to employees?

- Improve morale: 82%
- Ease traffic: 48%
- Employees asked for it: 43%
- Environment concerns: 41%
- Improve productivity: 39%
- Retention/turnover reduction: 39%
- Recruitment: 36%
- Reduce absenteeism: 36%
- Health/wellness concerns: 30%
- Be a good neighbor: 27%
- Reduce operating costs: 27%
- Parking shortage: 16%
- Make parking available for clients: 10%
- Comply with County/contract: 6%
- Organization was relocating: 2%
- Right thing to do: 1%

Chart shows actual number of respondents out of a possible 44 total.
Q19: For what reasons does your company offer transit benefits to employees?

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

ATP Client Study QC4/8: For what reasons did your organization/property decide to provide these services?
Motivators In Turning To Third-party Administrators
To Help With Transit Benefits
Many Find Third-party Benefits Administrators Easy to Use and Don’t Want the Hassle of Administering Benefits in House

Q9: Why do you use a third-party benefits administrator, such as CommuterDirect.com, for your transit benefits as opposed to using MetroChek, SmartBenefits, or Metro to administer the benefits in house?

- Ease of use: 27% (12 respondents)
- Not aware of other options: 16% (7 respondents)
- System already in place: 11% (5 respondents)
- Other responses: 43% (19 respondents)
- Don’t know: 1% (1 respondent)

Chart shows actual number of respondents out of a possible 44 total.
Comments On Why Clients Use a Third-party Administrator

“They provide a service that Metro doesn’t.”

“It could be an administration nightmare.”

“We are a small company and there is no regular staff to do it.”

“It’s because the building’s owners said we had to use it.”

“It combines MARC and the DC Metro.”

“Basically, it simplifies the process and we don’t have to cut checks. It is also easier to administer it to employees.”

Q9: Why do you use a third-party benefits administrator, such as CommuterDirect.com, for your transit benefits as opposed to using MetroChek, SmartBenefits, or Metro to administer the benefits in house?
Reasons Clients Choose CommuterDirect.com
Q10: Does your organization purchase transit passes, tickets, or other fares through any sources other than CommuterDirect.com?
Q11: What percentage of transit fares that your company purchases are made through CommuterDirect.com?
Q12: What source does your organization use most often for your transit fare purchases?

Of these 7 people, 1 purchases 26% to 50% and 6 purchase 25% or less from CD.

Of those 6, 5 purchase most often from WMATA and 1 said “They are both the same.”

Chart shows actual number of respondents out of a possible 44 total.
Ease of Use and Ability to Purchase Multiple Types of Ticket Media Are Why Clients Choose CommuterDirect

Q15: Which of the following reasons played a role in your organization’s decision to use CommuterDirect.com versus other alternatives for purchase of fares?

- Easy to use/convenient: 59% (26 respondents)
- Can purchase for all services in area: 55% (24 respondents)
- Can purchase for VRE & MARC: 52% (23 respondents)
- Prior good experience: 45% (20 respondents)
- Better record keeping: 43% (19 respondents)
- Not aware of other options: 39% (17 respondents)
- Better Web site: 36% (16 respondents)
- Better customer service: 34% (15 respondents)
- Can purchase MetroChek: 1 respondent
- Other: 2 respondents
- Don’t know: 1 respondent

Note: 4 respondents said that other people besides themselves in their organization require access to Commuter Direct, but none gave a name or contact information.

Chart shows actual number of respondents out of a possible 44 total.
Setting Up CommuterDirect.com
Almost Half of the Clients Inherited CommuterDirect from Their Organization

<table>
<thead>
<tr>
<th>Source</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization already had account</td>
<td>19</td>
<td>43%</td>
</tr>
<tr>
<td>Referral</td>
<td>8</td>
<td>18%</td>
</tr>
<tr>
<td>Metro, VRE, MARC, or WMATA.com</td>
<td>5</td>
<td>11%</td>
</tr>
<tr>
<td>Internet</td>
<td>4</td>
<td>9%</td>
</tr>
<tr>
<td>Arlington Transportation Partners</td>
<td>3</td>
<td>7%</td>
</tr>
<tr>
<td>CommuterPage.com</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Arlington County</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Manager asked for account</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

Chart shows actual number of respondents out of a possible 44 total.

Q3: How did you originally hear about CommuterDirect.com?
Only a Third Actually Set Up the Account Themselves

Q5: Did you set up this account, or was it set up by someone else?

- I set up account, 15, 34%
- Someone else set up account, 29, 66%
A Quarter Had ATP or CommuterDirect Help with Using Their Account

Q6: How did you first learn to use CommuterDirect.com?
Q7: If you remember the name of the person who trained you on CommuterDirect.com, please tell it to me.

Chart shows actual number of respondents out of a possible 44 total.
CommuterDirect and ATP Reps Get High Marks on the Help They Gave

Q8: How do you rate the help you received from ...? ASKED ONLY OF THOSE WHO SAID THEY RECEIVED HELP FROM ATP OR COMMUTERDIRECT

Chart shows actual number of respondents out of a possible 12 total.

Those who were taught by ATP or CD Rep
n = 12
Most Go to a Rep and a Few Can Name Them, But a Fifth Go Directly to the Web Site if They Have a Question or Issue

Q44: If you have a comment, question, or complaint about CommuterDirect.com, whom do you contact?

Chart shows actual number of respondents out of a possible 44 total.
Operating Features of CommuterDirect.com
CommuterDirect.com
Operating Features

• Web site
• Renewable Order Service
• Reporting Feature
• Fulfillment
CommuterDirect.com
Operating Features

- Web site
- Renewable Order Service
- Reporting Feature
- Fulfillment
Corporate Respondents Rate the CommuterDirect.com Web Site Highly on All Aspects

Q35: Moving on to the Web site itself, how do you rate each of these areas of the CommuterDirect.com Web site?

My Account: 16 Very good, 23 5 - Very good, 88%
Services: 18 Very good, 18 5 - Very good, 82%
My Home: 15 Very good, 19 5 - Very good, 77%
Products: 13 Very good, 20 5 - Very good, 75%
Reports: 10 Very good, 21 5 - Very good, 71%
Forms: 16 Very good, 15 5 - Very good, 70%

Chart shows actual number of respondents out of a possible 44 total.
Verbatim Comments on the Web Site

- Services: “I don’t find the Web site very user-friendly. They send reports that don’t include the total price that I pay so I have to go back online.”

- Forms: “The Web site is not user-friendly.”

- Other Comments:
  - “I think it’s an excellent site.”
  - “I noticed that the fees went up and they won’t go away.”
  - “The reporting could be more informative.”
  - “The reason [I gave it a] three is the forms are not that easy to use.”

Q36: You rated . . . A 1 or 2, why did you give that area this rating?
Q37: Would you like to make any comments on any of the other ratings you gave?
Q38: Would you like to make any comments on any of the ratings you gave?
CommuterDirect.com
Operating Features

• Web site
• Renewable Order Service
• Reporting Feature
• Fulfillment
About a Third Have Placed a One-time Order

All 15 placed the one-time order using the CommuterDirect.com Web site.

Have placed one-time order, 15, 34%

Have not placed one-time order, 27, 61%

Don't know, 2, 5%

Q30: Have you ever placed a one-time or non-renewable order on CommuterDirect.com?
Q32: How did you place the one-time order?
One-time Orders Were Placed For Various Reasons

Q31: For what reasons did you place a one-time order? ASKED ONLY OF THOSE WHO HAVE DONE SO

Chart shows actual number of respondents out of a possible 15 total.

- Needed different fare just that one time: 40% (6)
- New employee: 27% (4)
- Summer intern: 13% (2)
- Order changes all the time: 7% (1)
- Reorder: 7% (1)
- Don't know: 7% (1)

Those who have placed a one-time order: n = 15
Those Who Have Never Placed a One-time Order Prefer the Renewable

Q33: Why haven’t you placed a one-time order? ASKED ONLY OF THOSE WHO HAVE NOT DONE SO

Chart shows actual number of respondents out of a possible 27 total.

- Never had need: 70% (19 respondents)
- Easier to use renewable: 22% (6 respondents)
- Did not know about it: 1 (1 respondent)
- Not my job: 1 (1 respondent)
- "They ask for a couple of months at a time": 1 (1 respondent)
- Don’t know: 1 (1 respondent)

Those who have not placed a one-time order
n = 27
Those Who Have Made One-time Orders in the Past Are More Likely to Do So Again

Q34: How likely is your organization to place a one-time, non-renewable order in the future?

Chart shows actual number of respondents out of a possible 44 total.
Q21: Are you aware of the renewable order service on CommuterDirect.com?
Q22: CommuterDirect.com has a renewable order service where orders are automatically renewed each month. Renewable orders are shipped to arrive a few days prior to the beginning of the specific month. How likely is your organization to use this service in the future as opposed to the one-time order feature?
Q23: Does your organization use the renewable order service on CommuterDirect.com?
Q24: Why doesn’t your organization use the renewable order service on CommuterDirect.com?
Respondents Rate the Renewable Service Very Highly

Q25: How would you rate your experience with the renewable order service on CommuterDirect.com? ASKED ONLY OF THOSE WHO USE IT

- 5 - Very good: 56% (20 respondents)
- 4: 39% (14 respondents)
- Don't know: 1% (1 respondent)

Total respondents: 36

95% of respondents rate the service very good.
CommuterDirect.com Operating Features

- Web site
- Renewable Order Service
- Reporting Feature
- Fulfillment
A Little More than Half Have Used the Reporting Feature

Have never used reporting feature, 14, 39%

Have used reporting feature, 22, 61%

Q26: Have you ever used the “Reports” feature on the CommuterDirect.com Web site? ASKED ONLY OF THOSE WHO USE THE RENEWABLE ORDER SERVICE

n = 36
Most Use the Reporting Feature about Once a Month

Q27: How often do you use the “Reports” feature? ASKED ONLY OF THOSE WHO USE IT

Chart shows actual number of respondents out of a possible 22 total.

- Once a week or more: 1
- Two to three times a month: 1
- Once a month: 16 (73%)
- Less than once a month: 4 (18%)

Those who use the reporting feature
n = 22
The Majority Find the Reports “User Friendly”

Q28: How user-friendly do you think the reports are? ASKED ONLY OF THOSE WHO USE THEM

Chart shows actual number of respondents out of a possible 22 total.

- 5 - Very user-friendly: 45% (10 respondents)
- 4: 36% (8 respondents)
- 3: 14% (3 respondents)
- Don’t know: 14% (1 respondent)

Total respondents (n): 22

81% of respondents find the reports user-friendly.
CommuterDirect.com Operating Features

• Web site
• Renewable Order Service
• Reporting Feature
• Fulfillment
Respondents Are Pleased with CommuterDirect Fulfillment

Q40: Do you agree with the following statements?

- Package easily identifiable: 7 strongly agree, 34 agree (93%)
- Contents match order: 8 strongly agree, 32 agree (91%)
- SmartBenefits always applied correctly: 12 strongly agree, 27 agree (88%)
- Package arrives in timely manner: 5 strongly agree, 33 agree (86%)
- Shipping/handling fees are reasonable: 9 strongly agree, 26 agree (79%)
- Never had a problem receiving: 7 strongly agree, 27 agree (77%)
- No difficulty downloading benefits from the machine: 9 strongly agree, 21 agree (68%)
- If SmarTrip card replaced, no problems: 7 strongly agree, 19 agree (59%)

Chart shows actual number of respondents out of a possible 44 total.
Comments About Fulfillment

- Timeliness: "It’s random when it comes. It does not come on any specific day of the week."
- Receiving package: "We had a postal issue for one of our employees."
- Reasonable S/H Fees:
  - "It costs $20 to send one thing."
  - "The fees are a bit high."
  - "They are $25 to ship to the employee’s home, and I believe that’s expensive."

Q41: You rated . . . A 1 or 2, why do you not agree with this statement?
Comments About Fulfillment

• Difficulty with Metro Machines:
  - “They had difficulty by not having the right information.”
  - “We have had employees who have had problems downloading benefits.”

• SmarTrip Card Replacement:
  - “There are several staffers who have lost money as the customer service wasn’t very helpful getting money back. The people shouldn’t lose money because they forget.”
  - “There is always an issue trying to replace a card. It might not be CommuterDirect’s fault, but it might be Metro’s fault. I am unsure of where to lay blame.”

Q41: You rated . . . A 1 or 2, why do you not agree with this statement?
Comments About Fulfillment

• Other Comments:
  - “The downloading of information on the card is hard for non-English speaking people.”
  - “If they don’t use it by the end of the month, it disappears.”

Q42: Would you like to make any comments on any of the other ratings you gave?
Q43: Would you like to make any comments on any of the ratings you gave?
Clients’ Likes & Dislikes Regarding CommuterDirect.com
Q47: What do you like about CommuterDirect.com

- Ease of use: 68% (30 respondents)
- Convenience: 25% (11 respondents)
- Other responses: 27% (12 respondents)

Chart shows actual number of respondents out of a possible 44 total.
What Respondents Like about CommuterDirect.com

“It is a user-friendly Web site with good features, and I have a good relationship with my representative.”

“There are no headaches; they stay on top of things.”

“It is easy and convenient, one-stop shopping. I don’t need to go to other Web sites.

“I liked that when the employee who was handling the account left, the transition to the next employee was smooth.”
What Respondents Don’t Like about CommuterDirect.com

- 34 Respondents said that there wasn’t anything they dislike
- Others said:

  “It was hard to figure out the Web site at first.”

  “Their Customer Service could be better.”

  “I don’t like that there is a short enrollment window.”

  “I don’t like the time that it takes to enroll somebody to SmartTrip.”

  “I don’t like the fact that you lose money if you don’t download in time.”
What Respondents Don’t Like about CommuterDirect.com (Continued)

“I need detailed receipts of credit card transactions.”

“Sometimes when I make a change, it doesn’t change unless I call them.”

Q29: Do you have any comments about the renewable order service and the reporting service, such as any new reports or other improvements to the existing reports you would like to see? ASKED ONLY OF THOSE WHO USE THE RENEWABLE ORDER SERVICE
What Respondents Don’t Like about CommuterDirect.com (Continued)

“I don’t like the way it posts to my card, it says it is posting for a certain time period, but it is not the right time period.”

“The only thing that I don’t like is that you have to place the order for next month about a month ahead of time. I think it has to be placed before the tenth of each month.”

“The shipping charge is too high.”

“The only problem that I have is with reporting.”

“I think sometimes that the courier gets lost, like now we are waiting for a package.”

Q49: What do you not like about CommuterDirect.com?
Few Have Suggestions for CommuterDirect

Q49: How could we make CommuterDirect.com better?

- Easier to Navigate Web site: 4
- Better follow-up on issues: 4
- Reduce S/H Fees: 2
- Faster to enroll: 1
- Shorten ordering timeframe: 1
- Not lose benefits if don’t download on time: 1
- Offer training: 1
- Outreach to more companies: 1
- Don’t know: 29

Chart shows actual number of respondents out of a possible 44 total.
CommuterDirect.com
Performance Ratings
CommuterDirect.com Has Very High Satisfaction Ratings

Q45: Now we want to talk about your overall experience with CommuterDirect.com. How would you rate your overall experience with CommuterDirect.com?

Chart shows actual number of respondents out of a possible 44 total.
Respondents Rate CommuterDirect Highly on These Aspects as Well

Q39: How do you rate each of these aspects of CommuterDirect.com?

- **Customer service**: 16 out of 44 respondents rated it 4; 29 rated it 5.
- **Accuracy of orders**: 13 rated it 4; 29 rated it 5.
- **Responsiveness to needs**: 11 rated it 4; 30 rated it 5.
- **Enrollment of employees**: 10 rated it 4; 30 rated it 5.
- **Opening an account**: 13 rated it 4; 23 rated it 5.
- **Training**: 10 rated it 4; 20 rated it 5.
- **Onsite promotion to employees**: 11 rated it 4; 15 rated it 5.

Chart shows actual number of respondents out of a possible 44 total.
CommuterDirect.com Has an Outstanding Referral Base

Q51: How likely is it that you would recommend CommuterDirect.com to a friend or colleague?

- 5 - Very likely: 80% (35 respondents)
- 4: 16% (7 respondents)
- 3: 2% (2 respondents)

Chart shows actual number of respondents out of a possible 44 total.

96%
The “Net Promoter Score”

• The Net Promoter Score is defined as

  The percentage of promoters (somewhat/very likely to recommend) 96% (all respondents)
  
  Less:

  The percentage of detractors (somewhat/very unlikely to recommend) 0%

  *CommuterDirect.com Net Promoter Score 96%*
### Other Net Promoter Scores

**CommuterDirect.com Corporate** 96%

<table>
<thead>
<tr>
<th>Company</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>USAA</td>
<td>82%</td>
</tr>
<tr>
<td>HomeBanc*</td>
<td>81%</td>
</tr>
<tr>
<td>Harley-Davidson</td>
<td>81%</td>
</tr>
<tr>
<td>Costco</td>
<td>79%</td>
</tr>
<tr>
<td>Amazon</td>
<td>73%</td>
</tr>
<tr>
<td>Chick-Fil-A*</td>
<td>72%</td>
</tr>
<tr>
<td>Ebay</td>
<td>71%</td>
</tr>
<tr>
<td>Vanguard</td>
<td>70%</td>
</tr>
<tr>
<td>SAS</td>
<td>66%</td>
</tr>
<tr>
<td>Apple</td>
<td>66%</td>
</tr>
<tr>
<td>Intuit*</td>
<td>58%</td>
</tr>
<tr>
<td>Cisco</td>
<td>57%</td>
</tr>
<tr>
<td>Federal Express</td>
<td>56%</td>
</tr>
<tr>
<td>Southwest Airlines</td>
<td>51%</td>
</tr>
<tr>
<td>American Express</td>
<td>50%</td>
</tr>
<tr>
<td>Commerce Bank</td>
<td>50%</td>
</tr>
<tr>
<td>Dell</td>
<td>50%</td>
</tr>
<tr>
<td>Adobe</td>
<td>48%</td>
</tr>
<tr>
<td>Electronic Arts</td>
<td>48%</td>
</tr>
</tbody>
</table>

*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.*

**Other ACCS Net Promoter scores:**

- Commuter Store 78%
- ATP 61%
- Commuter Direct Individuals 82%
Q52: Have you ever recommended CommuterDirect.com?

Recall, 67% of Individuals had recommended Commuter Direct in the past.

- Have not recommended, 25, 57%
- Have recommended, 19, 43%

One in Four Have Already Recommended the Service
The Potential of CommuterDirect.com?
Recall from previous ACCS employer studies the potential growth for CommuterDirect.com...

Q22: Check all the services or benefits that are available to your employees. For those not available now, indicate if you would consider or not consider offering it.
Recall that Half of Arlington Business Leaders Would Consider Offering Monetary Transit Benefits to Their Employees

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

<table>
<thead>
<tr>
<th>Service</th>
<th>Do not currently offer</th>
<th>Would consider*</th>
<th>Would not consider*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation options information</td>
<td>55%</td>
<td>60%</td>
<td>14%</td>
</tr>
<tr>
<td>Transit schedules</td>
<td>48%</td>
<td>59%</td>
<td>9%</td>
</tr>
<tr>
<td>SmarTrip cards</td>
<td>68%</td>
<td>54%</td>
<td>19%</td>
</tr>
<tr>
<td>GRH</td>
<td>90%</td>
<td>50%</td>
<td>26%</td>
</tr>
<tr>
<td>Bike lockers/racks</td>
<td>60%</td>
<td>50%</td>
<td>34%</td>
</tr>
<tr>
<td>Transit financial benefits (Metrochek, SmartBenefits)</td>
<td>64%</td>
<td>47%</td>
<td>26%</td>
</tr>
<tr>
<td>Pre-tax transportation account</td>
<td>80%</td>
<td>46%</td>
<td>26%</td>
</tr>
<tr>
<td>Ridematching</td>
<td>88%</td>
<td>39%</td>
<td>30%</td>
</tr>
<tr>
<td>Car/Vanpool reserved parking</td>
<td>78%</td>
<td>32%</td>
<td>47%</td>
</tr>
<tr>
<td>Car/Vanpool financial benefit</td>
<td>91%</td>
<td>29%</td>
<td>49%</td>
</tr>
<tr>
<td>Teleworking</td>
<td>48%</td>
<td>29%</td>
<td>58%</td>
</tr>
<tr>
<td>Compressed workweek</td>
<td>72%</td>
<td>25%</td>
<td>60%</td>
</tr>
<tr>
<td>Flexible work schedules</td>
<td>44%</td>
<td>22%</td>
<td>63%</td>
</tr>
</tbody>
</table>

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

Note: This slide is from another ACCS Study: 2007 Arlington Business Leaders Study.
How To Grow ComuterDirect.com?
What, in your opinion, could CommuterDirect.com do to attract more business users?
Q50: What, in your opinion, could CommuterDirect.com do to attract more business users?

- Advertise more: 45% (20 responses)
- Other responses: 23% (10 responses)
- Nothing in particular: 9% (4 responses)
- Don’t know: 23% (10 responses)

Chart shows actual number of respondents out of a possible 44 total.
Verbatim Comments

“Advertising is the best way I can think of.”

“They could put a link to connect to the Metro Web site.”

“They need to promote themselves to small organizations.”

“They could partner up with parking garages.”

“They could market to facilities management.”
Verbatim Comments

“They could maybe start a newsletter or some emails about transportation, riding bikes, or walking. They could also use something motivational.”

“They could go out and offer benefits to providers and have an open enrollment.”

“They used to do giveaways and contests. Perhaps the could start doing that again.”

Q50: What, in your opinion, could CommuterDirect.com do to attract more business users?
One Benefit of Advertising CommuterDirect.com:
ACCS Could Get More Credit for Providing The Service, Even Among Citizens!
Q4: To the best of your knowledge, what organization operates CommuterDirect.com?

About Half Totally Misidentify CommuterDirect.com’s Sponsor

Chart shows actual number of respondents out of a possible 44 total.

Recall, Many CommuterDirect.com Individual Account Holders’ Also Don’t Have an Understanding of Who Provides the Service

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

- Arlington County: 12%
- WMATA: 11%
- Private company: 11%
- Maryland Transit: 5%
- Arlington Transit: 3%
- VDOT/VA Transit: 3%
- ACCS: 3%
- Other: 17%

2007 CommuterDirect.com Individuals Study
Key Take-A-Ways
Key Findings:

CommuterDirect gets high marks on all aspects of the service from the renewable order service to reporting, to fulfillment. And CommuterDirect.com offers great customer service whether it comes from CD or ATP. Those who are looking for answers know whom to contact and many are on a first name basis with your reps. CommuterDirect clients offer transit tickets to their employees even though parking is often adequate. In a nutshell, CommuterDirect.com is a terrific product that meets its clients’ needs.

Implication:

Keep up the good work! You have a great service. Future growth isn’t based on improving the product, but getting more usage among existing ATP clients and starting new accounts.
Key Findings:

Most of your clients are aware of the renewable order service and it appears many use it. And they love it! Satisfaction of the renewable order service is very high - 95% top-two box!

If they don’t use the service, it’s usually because it doesn’t fit with their needs (e.g. they make different orders monthly). But, do they really know what they are missing? Is there more growth opportunity with converting existing clients?

Implication:

Make sure that every client who is in a situation where renewable ordering might makes sense is not only aware of the service but familiar with it. Consistently merchandise the high satisfaction scores and appropriate testimonials to all accounts that are not using this service.
Key Findings:

Intent to refer is the highest yet seen for ACCS at 96% with no one detracting. However, fewer corporate clients than individuals have recommended CommuterDirect.com in the past. Do they know how? Have they been asked?

Implication:

Consider a Referral Rewards program to use your apostles! Give them the charge, tools, and incentives to help you attract new customers.
Key Findings:

CommuterDirect clients offer other transportation benefits in addition to transit tickets. However, they are less likely than respondents in the ATP Client Study and the Arlington Business Leaders Study to offer transit schedules.

Implication:

Ensure CommuterDirect.com clients are taking advantage of the services offered by ATP, especially transit schedules. These are the low-hanging fruit. Make them earn that tier 3 designation!
Key Findings:

More than other audiences studied, CommuterDirect clients offer transportation benefits to ease traffic and help the environment.

Implication:

Because this survey had an extremely small sample size, we must be cautious about making too much out of this change in thinking. However, either CommuterDirect.com clients are more earth-conscious than other audiences or we are seeing a change in how transit benefits are linked to traffic reduction and the environment. Take advantage of the current climate (i.e. environment in the forefront politically, high gas prices) in your advertising of CommuterDirect.com. We will study this issue more with future studies and other audiences.
APPENDIX
The Questions that Katie Sihler Would Like the Survey to Answer

- **For those using the monthly renewable service:**
  - Why do the customers use a third party benefits administrator for their transportation benefits? Why not do it in house?
  - Why did they choose CDCS verse another third party administrator?
  - Why do they offer transit benefits? Why do they offer it as a direct benefit/pretax benefit?
  - How often does the customer use the Reporting feature?
  - Are the reports user-friendly?
  - What other reports would the customer like to see?
  - Is there more than one person in your dept/office requiring access to CDCS?

- **One-time orders:**
  - Why did they do a one-time order? What did they use the passes for?
  - Would they order again?
  - Do they know about the monthly renewable service and benefits administration?
  - How was their service: taking the order—placing the order—receiving the order—was it correct—any issues—
  - How (fax, online, phone) did you place the order?

- **Overall service issues:**
  - Are our service and shipping fees ok? Too high/too low?
  - How does CIC order processing and customer service effect overall CDCS sales?
  - How does ATP sales and customer service effect overall CDCS sales?
  - What can we do to improved the service?
    - Online program
    - Customer service
    - Accuracy of orders
    - Enrollment of employees
    - Responsiveness in relation to needs of customer
    - Timeliness of orders
    - Marketing the service (transit benefits) to employees
    - Marketing the service (CDCS and one-time orders) to employers and residential properties
  - What online features do they like? What needs to be improved?
Most Respondents Are in the Arlington Area, But Some Users Live as Far Out as Charlottesville and Winchester

Zip Code Source: CommuterDirect.com records
## Zip Codes

<table>
<thead>
<tr>
<th>Total Client List</th>
<th>Respondent List</th>
</tr>
</thead>
<tbody>
<tr>
<td>01803 (1)</td>
<td>02472 (1)</td>
</tr>
<tr>
<td>02140 (1)</td>
<td>10018 (1)</td>
</tr>
<tr>
<td>02472 (1)</td>
<td>10169 (1)</td>
</tr>
<tr>
<td>07724 (1)</td>
<td>20003 (1)</td>
</tr>
<tr>
<td>10018 (1)</td>
<td>20005 (4)</td>
</tr>
<tr>
<td>10169 (1)</td>
<td>20006 (1)</td>
</tr>
<tr>
<td>15222 (1)</td>
<td>20009 (1)</td>
</tr>
<tr>
<td>20001 (1)</td>
<td>20036 (4)</td>
</tr>
<tr>
<td>20003 (1)</td>
<td>20814 (1)</td>
</tr>
<tr>
<td>20005 (6)</td>
<td>22033 (1)</td>
</tr>
<tr>
<td>20006 (2)</td>
<td>22043 (1)</td>
</tr>
<tr>
<td>20009 (2)</td>
<td>22069 (2)</td>
</tr>
<tr>
<td>20036 (7)</td>
<td>22102 (1)</td>
</tr>
<tr>
<td>20036 (1)</td>
<td>22202 (2)</td>
</tr>
<tr>
<td>20706 (2)</td>
<td>22206 (2)</td>
</tr>
<tr>
<td>20814 (4)</td>
<td>22209 (2)</td>
</tr>
<tr>
<td>20901 (1)</td>
<td>22302 (1)</td>
</tr>
<tr>
<td>20910 (1)</td>
<td>22311 (1)</td>
</tr>
<tr>
<td>21202 (1)</td>
<td>22314 (6)</td>
</tr>
<tr>
<td></td>
<td>22407 (1)</td>
</tr>
<tr>
<td></td>
<td>22601 (1)</td>
</tr>
<tr>
<td></td>
<td>22903 (1)</td>
</tr>
<tr>
<td></td>
<td>94403 (1)</td>
</tr>
<tr>
<td></td>
<td>15222 (1)</td>
</tr>
</tbody>
</table>