ACCS 2012
Commuter Store® Study

June 2012

Prepared By

LDA Consulting

Southeastern Institute of Research
Study Background Objectives & Methodology
Study Background

• This research study is a component of the ACCS Research & Evaluation Plan
• The purposes of this study are the following:

  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®.
Study Objectives

- Profile current The Commuter Store® users
- Identify what prompts store visit
- Assess the current customer experience and satisfaction with The Commuter Stores®
- Identify store users’ needs for commuter information, fare media and trip planning assistance services
- Understand extent to which store is meeting consumer needs
- Find perceived opportunities and challenges with stores’ existing products/services
- Identify return on investment/impact/results
- Evaluate the impact of shifting the Ballston location from inside the mall to the outdoor kiosk
Methodology

• Intercept survey conducted at five stores
  - Fieldwork conducted April 24, 2012 to May 1, 2012
  - Interceptors approached customers as they were leaving the store
  - They were asked to complete a short, seven-question intercept survey

• Interceptors asked respondents to also take a 12-minute online survey
  - $5 Starbucks gift card offered for completing the full survey

• Full survey was available in store at a web kiosk or computer and off-site
  - Respondents who wanted to complete the full survey off-site were asked for their email address
2012 Response Breakdown

<table>
<thead>
<tr>
<th>Store</th>
<th>Intercept Survey</th>
<th>Full Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballston</td>
<td>146</td>
<td>73</td>
</tr>
<tr>
<td>Crystal City</td>
<td>227</td>
<td>122</td>
</tr>
<tr>
<td>Rosslyn*</td>
<td>91</td>
<td>27</td>
</tr>
<tr>
<td>Shirlington*</td>
<td>37</td>
<td>11</td>
</tr>
<tr>
<td>Mobile</td>
<td>67</td>
<td>51</td>
</tr>
<tr>
<td>TOTAL</td>
<td>568</td>
<td>284</td>
</tr>
</tbody>
</table>

*The sample size for Shirlington and Rosslyn are too small to make meaningful comparisons. They are included in all total numbers.*
## 2009 Response Breakdown

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

Where are you taking this survey?

- In the Commuter Store: 72%
- Other location: 28%

n = 284
Who Are The Commuter Store® Patrons?
Slightly More Men Than Women Took The Commuter Store® Survey, but the Split Is Becoming More Equal

C12. Are you

Male

2012: 62%
2009: 55%
2007: 53%

Female

2012: 38%
2009: 45%
2007: 47%

2012 n = 284
2009 n = 564
2007 n = 525

Does not include those who preferred not to answer
The Number of Black Respondents Increased in This Study

C10. Which one of the following best describes your racial background?

- White, non-Hispanic
- Black
- Hispanic or Latino
- Asian
- Other

2012 n = 284
2009 n = 520
Does not include those who preferred not to answer
There Was a Large Increase in the Number of Black Respondents from the Ballston Location

Graph shows Ballston respondents only.

2012 n = 63
2009 n = 141
Does not include those who preferred not to answer

F-C10. Which one of the following best describes your racial background?
Crystal City Had the Greatest Percentage of White Respondents and Ballston Had the Most Black and Hispanic Respondents

**The Mobile Commuter Store**
- **White**: 54% (2012) vs. 55% (2009)
- **Black**: 33% (2012) vs. 36% (2009)
- **Hispanic or Latino**: 12% (2012) vs. 9% (2009)
- **Asian**: 2% (2012) vs. 9% (2009)
- **Other**: 0% (2012) vs. 7% (2009)

*Please use caution when interpreting the Shirlington & Rosslyn results because of low sample sizes for these locations*
Overall, 9% of Respondents Took the Intercept Survey in Spanish; Ballston had the Greatest Percentage of Respondents Choose the Spanish Option

<table>
<thead>
<tr>
<th>Store Location</th>
<th>English</th>
<th>Spanish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballston</td>
<td>72%</td>
<td>28%</td>
</tr>
<tr>
<td>Crystal City</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Rosslyn</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>The Mobile Commuter Store</td>
<td>95%</td>
<td>5%</td>
</tr>
<tr>
<td>Shirlington</td>
<td>83%</td>
<td>17%</td>
</tr>
</tbody>
</table>

n = 553
The Income Level of Respondents Remained Stable

C11. Which category best represents your household’s total annual income?

- More than $120,000
- $60,000 to $120,000
- Less than $60,000

2012 n = 230
2009 n = 548
Does not include those who preferred not to answer
Ballston Had the Largest Percentage of Respondents with Incomes of Less Than $60,000 per Year

C11. Which category best represents your household’s total annual income?

- **Less than $60,000**
  - The Mobile Commuter Store: 20%
  - Shirlington: 45%
  - Rosslyn: 19%
  - Crystal City: 41%
  - Ballston: 45%

- **$60,000 to $120,000**
  - The Mobile Commuter Store: 40%
  - Shirlington: 36%
  - Rosslyn: 36%
  - Crystal City: 45%
  - Ballston: 45%

- **More than $120,000**
  - The Mobile Commuter Store: 10%
  - Shirlington: 18%
  - Rosslyn: 23%
  - Crystal City: 36%
  - Ballston: 36%

*Please use caution when interpreting the Shirlington & Rosslyn results because of low sample sizes for these locations.*
The Age Distribution of The Commuter Store® Customer Respondents Remained Relatively Stable

<table>
<thead>
<tr>
<th>Generation</th>
<th>2012</th>
<th>2009</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials (1983 and later)</td>
<td>11%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Gen X (1965-1982)</td>
<td>31%</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>Boomers (1946-1964)</td>
<td>53%</td>
<td>49%</td>
<td>50%</td>
</tr>
<tr>
<td>Silent (1945 and earlier)</td>
<td>11%</td>
<td>9%</td>
<td>7%</td>
</tr>
</tbody>
</table>

C8. In what year were you born?

2012 n = 284
2009 n = 548
Similar to 2009, Almost 8 in 10 Respondents Are Employed Full-Time

C3. What is your current employment status?

<table>
<thead>
<tr>
<th>Employment Status</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employed full-time (35 hours or more per week)</td>
<td>76%</td>
<td>78%</td>
</tr>
<tr>
<td>Employed part-time (less than 35 hours per week)</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Not employed</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Other (includes students)</td>
<td>1%</td>
<td>4%</td>
</tr>
</tbody>
</table>

2012 n = 284
2009 n = 548
## The Ballston Location Has More Customers Not Employed Full-Time

<table>
<thead>
<tr>
<th>Employment Status</th>
<th>Ballston 2012</th>
<th>Ballston 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employed full-time (35 hours or more per week)</td>
<td>86%</td>
<td>82%</td>
</tr>
<tr>
<td>Employed part-time (less than 35 hours per week)</td>
<td>18%</td>
<td>22%</td>
</tr>
<tr>
<td>Not employed</td>
<td>4%</td>
<td>14%</td>
</tr>
<tr>
<td>Other (includes students)</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>

### C3. What is your current employment status?

*Please use caution when interpreting the Shirlington & Rosslyn results because of low sample sizes for these locations.*

2012 n = 284
2009 n = 548
The Commuter Store® Customers Live All Over the Region
Customers are Concentrated in Areas Close to Arlington County and the I-95 Corridor
64% of Respondents Who Live in Arlington Have Lived in There for More Than Five Years

C2. How long have you lived in Arlington County?

2007 n = 110
2009 n = 139
2012 n = 62
The Commuter Store® Customers Work Throughout the Metro DC Region
Customer Work Locations Are Concentrated in Arlington
Employers are increasing as a source for learning about The Commuter Store®, yet few respondents know who operates The Commuter Store®.
Employers Are Increasing as a Source for Learning About The Commuter Store®

A1. Where did you first hear about The Commuter Store®? (Please choose only one)

- Passing by: 2007 n = 35%, 2009 n = 14%, 2012 n = 7%
- Employer: 2007 n = 17%, 2009 n = 26%, 2012 n = 24%
- Friend/Family/Co-Worker: 2007 n = 12%, 2009 n = 12%, 2012 n = 12%
- Website: 2007 n = 7%, 2009 n = 5%, 2012 n = 5%
- Advertisement: 2007 n = 10%, 2009 n = 3%, 2012 n = 2%
- Brochure: 2007 n = 6%, 2009 n = 8%, 2012 n = 8%

Overall, 60% of Ballston respondents said they first heard about The Commuter Store® by just passing by.
A1. Where did you first hear about The Commuter Store®? (Please choose only one)

- Passing by: 25% (Store) vs. 60% (Kiosk)
- Friend/Family/Co-Worker: 13% (Store) vs. 18% (Kiosk)
- Advertisement: 6% (Store) vs. 3% (Kiosk)
- Outdoor signage: 5% (Store) vs. 3% (Kiosk)
- Employer: 16% (Store) vs. 27% (Kiosk)
- Website: 16% (Store) vs. 2% (Kiosk)
- Brochure: 1% (Store) vs. 2% (Kiosk)
- Other: 4% (Store) vs. 5% (Kiosk)

n = 284
Almost a Quarter of Respondents Recognize That The Commuter Store® Is Operated by Arlington County, but Fewer Mention ACCS

A2. To the best of your knowledge, what organization operates The Commuter Stores®?

- Arlington County: 22%
- Metro/Metro bus: 19%
- WAMATA: 11%
- Government: 4%
- Arlington Transit: 4%
- Maryland/MTA: 3%
- CommuterDirect: 3%
- Commuter Connections: 3%
- VRE: 2%
- The Commuter Store: 2%
- Private: 1%
- Virginia/VDOT: 1%
- ACCS/ATP: 1%
- Don't know: 18%
- Other: 5%

n = 284
Respondents Are Most Familiar with WAMATA, VRE and Arlington Transit

<table>
<thead>
<tr>
<th>Service</th>
<th>Have used in the past</th>
<th>Have not used, but am aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro/WAMATA</td>
<td>70%</td>
<td>13%</td>
</tr>
<tr>
<td>Virginia Railway Express (VRE)</td>
<td>44%</td>
<td>30%</td>
</tr>
<tr>
<td>Arlington Transit (ART)</td>
<td>28%</td>
<td>37%</td>
</tr>
<tr>
<td>CommuterDirect.com</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>Maryland Transit Administration (MTA)/MARC</td>
<td>25%</td>
<td>36%</td>
</tr>
<tr>
<td>Arlington County Commuter Services</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>CommuterPage.com</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Commuter Connections</td>
<td>17%</td>
<td>36%</td>
</tr>
<tr>
<td>BikeArlington</td>
<td>7%</td>
<td>44%</td>
</tr>
<tr>
<td>Walk Arlington</td>
<td>7%</td>
<td>37%</td>
</tr>
<tr>
<td>Arlington's Car-Free Diet</td>
<td>4%</td>
<td>37%</td>
</tr>
<tr>
<td>Telework!VA</td>
<td>5%</td>
<td>28%</td>
</tr>
</tbody>
</table>

A14. Following is a list of commuter information and assistance services available in Arlington County. In the first column, check all the services or benefits that you have used. For those that you have not used, please indicate if you are aware of them or not.
Ballston Customers Were Most Familiar with ART

<table>
<thead>
<tr>
<th>Service</th>
<th>Have used in the past</th>
<th>Have not used, but am aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arlington Transit (ART)</td>
<td>67%</td>
<td>12%</td>
</tr>
<tr>
<td>Metro/WAMATA</td>
<td>56%</td>
<td>10%</td>
</tr>
<tr>
<td>Arlington County Commuter Services</td>
<td>41%</td>
<td>11%</td>
</tr>
<tr>
<td>BikeArlington</td>
<td>12%</td>
<td>37%</td>
</tr>
<tr>
<td>Virginia Railway Express (VRE)</td>
<td>15%</td>
<td>33%</td>
</tr>
<tr>
<td>Walk Arlington</td>
<td>16%</td>
<td>30%</td>
</tr>
<tr>
<td>Arlington's Car-Free Diet</td>
<td>8%</td>
<td>36%</td>
</tr>
<tr>
<td>CommuterPage.com</td>
<td>15%</td>
<td>27%</td>
</tr>
<tr>
<td>CommuterDirect.com</td>
<td>14%</td>
<td>26%</td>
</tr>
<tr>
<td>Maryland Transit Administration (MTA)/MARC</td>
<td>18%</td>
<td>22%</td>
</tr>
<tr>
<td>Commuter Connections</td>
<td>8%</td>
<td>30%</td>
</tr>
<tr>
<td>Telework!VA</td>
<td>8%</td>
<td>22%</td>
</tr>
</tbody>
</table>

n = 73

A14. Following is a list of commuter information and assistance services available in Arlington County. In the first column, check all the services or benefits that you have used. For those that you have not used, please indicate if you are aware of them or not.
Crystal City Customers Were Familiar with Metro, VRE and CommuterDirect.com

<table>
<thead>
<tr>
<th>Service/Service</th>
<th>Have used in the past</th>
<th>Have not used, but am aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro/WAMATA</td>
<td>73%</td>
<td>17%</td>
</tr>
<tr>
<td>Virginia Railway Express (VRE)</td>
<td>67%</td>
<td>23%</td>
</tr>
<tr>
<td>CommuterDirect.com</td>
<td>45%</td>
<td>32%</td>
</tr>
<tr>
<td>Maryland Transit Administration (MTA)/MARC</td>
<td>21%</td>
<td>45%</td>
</tr>
<tr>
<td>Commuter Connections</td>
<td>27%</td>
<td>39%</td>
</tr>
<tr>
<td>CommuterPage.com</td>
<td>25%</td>
<td>39%</td>
</tr>
<tr>
<td>Arlington County Commuter Services</td>
<td>27%</td>
<td>34%</td>
</tr>
<tr>
<td>Arlington Transit (ART)</td>
<td>13%</td>
<td>48%</td>
</tr>
<tr>
<td>BikeArlington</td>
<td>2%</td>
<td>52%</td>
</tr>
<tr>
<td>Walk Arlington</td>
<td>2%</td>
<td>44%</td>
</tr>
<tr>
<td>Arlington's Car-Free Diet</td>
<td>2%</td>
<td>39%</td>
</tr>
<tr>
<td>Telework!VA</td>
<td>2%</td>
<td>38%</td>
</tr>
</tbody>
</table>

n = 122

A14. Following is a list of commuter information and assistance services available in Arlington County. In the first column, check all the services or benefits that you have used. For those that you have not used, please indicate if you are aware of them or not.
Rosslyn Customers Frequently Use Metro

A14. Following is a list of commuter information and assistance services available in Arlington County. In the first column, check all the services or benefits that you have used. For those that you have not used, please indicate if you are aware of them or not.

- Metro/WAMATA: 81% used, 8% have not used but are aware, 89% total
- Virginia Railway Express (VRE): 27% used, 46% have not used but are aware, 73% total
- Maryland Transit Administration (MTA)/MARC: 27% used, 42% have not used but are aware, 69% total
- CommuterDirect.com: 35% used, 23% have not used but are aware, 58% total
- Arlington Transit (ART): 19% used, 38% have not used but are aware, 57% total
- Commuter Connections: 16% used, 36% have not used but are aware, 52% total
- CommuterPage.com: 15% used, 35% have not used but are aware, 50% total
- BikeArlington: 12% used, 38% have not used but are aware, 50% total
- Arlington's Car-Free Diet: 8% used, 42% have not used but are aware, 50% total
- Walk Arlington: 12% used, 35% have not used but are aware, 47% total
- Arlington County Commuter Services: 15% used, 27% have not used but are aware, 42% total
- Telework!VA: 8% used, 23% have not used but are aware, 31% total

n = 26

Caution: Small Sample Size
Shirlington Customers Were Not as Familiar with Online Services and Resources

<table>
<thead>
<tr>
<th>Service/Program</th>
<th>Have used in the past</th>
<th>Have not used, but am aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro/WAMATA</td>
<td>91%</td>
<td>9%</td>
</tr>
<tr>
<td>Arlington Transit (ART)</td>
<td>55%</td>
<td>45%</td>
</tr>
<tr>
<td>Virginia Railway Express (VRE)</td>
<td>9%</td>
<td>73%</td>
</tr>
<tr>
<td>BikeArlington</td>
<td>18%</td>
<td>55%</td>
</tr>
<tr>
<td>Arlington County Commuter Services</td>
<td>45%</td>
<td>27%</td>
</tr>
<tr>
<td>Maryland Transit Administration (MTA)/MARC</td>
<td>27%</td>
<td>36%</td>
</tr>
<tr>
<td>Walk Arlington</td>
<td>18%</td>
<td>36%</td>
</tr>
<tr>
<td>Commuter Connections</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>Arlington’s Car-Free Diet</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>CommuterPage.com</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>CommuterDirect.com</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Telework!VA</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

A14. Following is a list of commuter information and assistance services available in Arlington County. In the first column, check all the services or benefits that you have used. For those that you have not used, please indicate if you are aware of them or not.
Mobile Commuter Store Customers Are Most Familiar with Metro, VRE & MARC

<table>
<thead>
<tr>
<th>Service</th>
<th>Have used in the past</th>
<th>Have not used, but am aware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro/WAMATA</td>
<td>71%</td>
<td>14%</td>
</tr>
<tr>
<td>Virginia Railway Express (VRE)</td>
<td>47%</td>
<td>25%</td>
</tr>
<tr>
<td>Maryland Transit Administration (MTA)/MARC</td>
<td>41%</td>
<td>29%</td>
</tr>
<tr>
<td>CommuterDirect.com</td>
<td>45%</td>
<td>24%</td>
</tr>
<tr>
<td>Arlington County Commuter Services</td>
<td>22%</td>
<td>35%</td>
</tr>
<tr>
<td>ComuterPage.com</td>
<td>25%</td>
<td>31%</td>
</tr>
<tr>
<td>Comuter Connections</td>
<td>20%</td>
<td>33%</td>
</tr>
<tr>
<td>Arlington Transit (ART)</td>
<td>8%</td>
<td>41%</td>
</tr>
<tr>
<td>BikeArlington</td>
<td>6%</td>
<td>33%</td>
</tr>
<tr>
<td>Walk Arlington</td>
<td>4%</td>
<td>29%</td>
</tr>
<tr>
<td>Arlington's Car-Free Diet</td>
<td>4%</td>
<td>29%</td>
</tr>
<tr>
<td>Telework!VA</td>
<td>8%</td>
<td>22%</td>
</tr>
</tbody>
</table>

n = 51

A14. Following is a list of commuter information and assistance services available in Arlington County. In the first column, check all the services or benefits that you have used. For those that you have not used, please indicate if you are aware of them or not.
Generational Differences in Service Awareness and Use

- Boomers are more likely to have used CommuterDirect.com than Millennials.
- Millennials are more likely to have used both WalkArlington and BikeArlington.
- Millennials are more likely to have used ART than other generational groups.
- Millennials are more likely to have used Arlington’s Car-Free Diet than other generational groups.
Implication

Continue to leverage relationships with employers, since they are a major (and growing) referral source. Determine if it is important that customers know who operates The Commuter Stores®.
Most respondents came into The Commuter Store® looking for tickets or fares. Fewer are searching for information.
8 Out of 10 Respondents Went to The Commuter Store® to Purchase Tickets

I-Q1. Why did you come into The Commuter Store® today?

- Needed a fare card, tokens, ticket or pass: 81%
- Needed information: 10%
- Needed a map/bus schedule/guide: 5%
- Looking for ways to make my commute better: 3%
- Just interested in seeing what it's about: 2%
- Needed someplace to kill time: 2%
- Other: 5%

n = 568
The Crystal City Store Is Least Likely to Have Customers Seeking Information

I-Q1. Why did you come into The Commuter Store® today?

- **Needed a fare card, tokens, ticket or pass**
  - Ballston: 81%
  - Crystal City: 82%
  - Rosslyn: 51%
  - Shirlington: 51%
  - The Mobile Store: 90%

- **Needed information**
  - Ballston: 16%
  - Crystal City: 13%
  - Rosslyn: 13%
  - Shirlington: 13%
  - The Mobile Store: 10%

- **Needed a map/bus schedule/guide**
  - Ballston: 3%
  - Crystal City: 8%
  - Rosslyn: 3%
  - Shirlington: 8%
  - The Mobile Store: 10%

- **Looking for ways to make my commute better**
  - Ballston: 1%
  - Crystal City: 4%
  - Rosslyn: 3%
  - Shirlington: 3%
  - The Mobile Store: 1%

- **Just interested in seeing what it’s about**
  - Ballston: 2%
  - Crystal City: 1%
  - Rosslyn: 2%
  - Shirlington: 1%
  - The Mobile Store: 1%

- **Needed someplace to kill time**
  - Ballston: 1%
  - Crystal City: 3%
  - Rosslyn: 1%
  - Shirlington: 1%
  - The Mobile Store: 1%

- **Other**
  - Ballston: 1%
  - Crystal City: 3%
  - Rosslyn: 2%
  - Shirlington: 2%
  - The Mobile Store: 5%

**n = 568**
86% of the Respondents Made a Purchase While at The Commuter Store®—This Is Slightly More Than Previous Years

A8. Did you make a purchase during your most recent visit to The Commuter Store®?

- 86% of the respondents made a purchase.
- This is slightly more than previous years.

Comparison by Year:
- 2007: 80%
- 2009: 79%
- 2012: 86%

- 16% of purchasers received a discounted fare for age or disability in 2009.
- 13% in 2012.
- 80% of eligible respondents knew they could receive a senior discount in 2012.

n = 284

Most of the respondents that did not make a purchase said it was because they just needed information. A few did not know they could make purchases.
Arlington County Non-Residents Are More Likely to Make a Purchase When Visiting The Commuter Store®

A8. Did you make a purchase during your most recent visit to The Commuter Store®?

A9. What did you purchase?

n = 284
A8. Did you make a purchase during your most recent visit to The Commuter Store®?

A9. What did you purchase?
SmarTrip Cards and VRE Tickets Were Commonly Purchased

- VRE pass or tickets: 34%
- SmarTrip card: 27%
- Other Metro fare card or pass (rail or bus): 11%
- MARC pass or tickets: 8%
- Train Link card (TLC): 6%
- ART tokens: 1%
- DASH monthly pass: 1%
- Other: 3%

A9. What did you purchase?

n = 284
Ballston Customers Frequently Purchased SmarTrip Cards or Other Metro Fares

A9. What did you purchase?

- SmarTrip card: 52%
- Other Metro fare card or pass (rail or bus): 21%
- MARC pass or tickets: 0%
- Train Link card (TLC): 3%
- ART tokens: 3%
- DASH monthly pass: 0%
- Other: 8%

Graph shows Ballston respondents only.

n = 73
Crystal City Customers Purchased VRE Passes Most Frequently

A9. What did you purchase?

- VRE pass or tickets: 60%
- SmarTrip card: 16%
- Other Metro fare card or pass (rail or bus): 7%
- MARC pass or tickets: 6%
- Train Link card (TLC): 8%
- ART tokens: 0%
- DASH monthly pass: 2%
- Other: 1%

Graph shows Crystal City respondents only. n = 122
Customers at The Mobile Commuter Store Frequently Purchase Commuter Train Tickets (Both VRE & MARC)

A9. What did you purchase?

- VRE pass or tickets: 41%
- SmarTrip card: 18%
- Other Metro fare card or pass (rail or bus): 4%
- MARC pass or tickets: 27%
- Train Link card (TLC): 2%
- ART tokens: 0%
- DASH monthly pass: 0%
- Other: 2%

Graph shows Mobile Store respondents only.

n = 51
Almost 4 out of 10 Picked up a Free Schedule During Their Trip—Up Slightly from 2009

A21. While in the store, did you pick up a free schedule or brochure?

- 2007: 43% (n = 550)
- 2009: 35% (n = 569)
- 2012: 38% (n = 284)
Only 9% Said the Products or Services They Were Looking for Were Not Available

A23. Were there any local travel information products or travel services that you need or want that were not offered at the Store?

- Yes 9%
- No 65%
- Don't know 25%

n = 284
A25. Did you ask a staff member to help find the information you needed?

- Yes, and he or she was able to find it for me: 43%
- Yes, and he or she was able to print it for me: 19%
- Yes, but he or she was not able to find or print it: 0%
- No, I did not ask for assistance: 38%

This question was not asked in 2009.
Implication

There is an opportunity to further promote The Commuter Store®’s travel information services.
Many customers are new to The Commuter Store®—particularly the store in Ballston.
Almost 3 in 10 Respondents Said They Began Visiting The Commuter Store® Within the Past Three Months

A7. When did you first visit The Commuter Store®?

- Within the past 3 months: 29%
- Between 3 and 6 months ago: 7%
- Between 6 and 12 months ago: 9%
- Between 1 and 4 years ago: 32%
- Between 5 and 9 years ago: 15%
- 10 or more years ago: 6%
- Don’t know/Can’t remember: 2%

n = 284
More Kiosk Respondents Said They Began Visiting The Commuter Store® Within the Past Three Months

- Within the past 3 months: 50% Store, 20% Kiosk
- Between 3 and 6 months ago: 6% Store, 8% Kiosk
- Between 6 and 12 months ago: 6% Store, 10% Kiosk
- Between 1 and 4 years ago: 11% Store, 21% Kiosk
- Between 5 and 9 years ago: 17% Store, 11% Kiosk
- 10 or more years ago: 6% Store, 6% Kiosk
- Don't know/Can't remember: 0% Store, 0% Kiosk

n = 284
A Greater Portion of Ballston Respondents Began Using The Commuter Store® in the Past Three Months

A7. When did you first visit The Commuter Store®?

- Within the past 3 months
- Between 3 and 6 months ago
- Between 6 and 12 months ago
- Between 1 and 4 years ago
- Between 5 and 9 years ago
- 10 or more years ago
- Don't know/Can't remember

n = 284
4 in 10 Arlington County Resident Respondents Are New to The Commuter Store®

A7. When did you first visit The Commuter Store®?

- Within the past 3 months: 24% (Arlington County Resident), 5% (Arlington County Non-Resident)
- Between 3 and 6 months ago: 7% (Arlington County Resident), 11% (Arlington County Non-Resident)
- Between 6 and 12 months ago: 8% (Arlington County Resident), 8% (Arlington County Non-Resident)
- Between 1 and 4 years ago: 20% (Arlington County Resident), 36% (Arlington County Non-Resident)
- Between 5 and 9 years ago: 8% (Arlington County Resident), 17% (Arlington County Non-Resident)
- 10 or more years ago: 8% (Arlington County Resident), 5% (Arlington County Non-Resident)
- Don't know/Can't remember: 3% (Arlington County Resident), 3% (Arlington County Non-Resident)

n = 284
In the 2012 Study, More Respondents Said They Visit The Commuter Store® Once a Month or More Than in the 2007 or 2009 Studies

I-Q6. How often do you visit this and/or any other Commuter Store® in Arlington County (i.e., the Ballston, Rosslyn, Crystal City, Shirlington and Mobile Commuter Stores)?

- Once a week or more: 12% (2012), 16% (2009), 18% (2007)
- One to three times per month: 21% (2012), 20% (2009), 16% (2007)
- Once a month: 47% (2012), 42% (2009), 12% (2007)
- A few times a year: 16% (2012), 13% (2009), 7% (2007)
- Once a year: 2% (2012), 3% (2009), 2% (2007)
- Almost never: 5% (2012), 4% (2009), 4% (2007)

n = 486
Ballston has more weekly customers, while Crystal City and The Mobile Store have more monthly customers.

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
<th>Shirlington</th>
<th>The Mobile Commuter Store</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once a week or more</td>
<td>51%</td>
<td>74%</td>
<td>28%</td>
<td>8%</td>
<td>0%</td>
</tr>
<tr>
<td>One to three times per month</td>
<td>4%</td>
<td>6%</td>
<td>8%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Once a month</td>
<td>80%</td>
<td>83%</td>
<td>80%</td>
<td>83%</td>
<td>80%</td>
</tr>
<tr>
<td>A few times a year</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
</tr>
</tbody>
</table>

I-Q6. How often do you visit this and/or any other Commuter Store in Arlington County (i.e., the Ballston, Rosslyn, Crystal City, Shirlington and Mobile Commuter Stores)?
Over Three-Quarters of Respondents Choose Convenient Locations—Those Close to Home or Work

A3. What made you select this particular store?

- Near my work: 63%
- Near my home: 15%
- Past experience: 7%
- Only one I know of: 5%
- Referred by friend/family/co-worker: 5%
- Referred by employer: 2%
- Other/Don’t know: 10%

n = 284
Boomers and Gen Xers Are More Likely to Choose Locations Close to Work

A3. What made you select this particular store?

- Near my work: Silent (26%), Boomers (32%), Gen X (47%), Millennials (66%)
- Near my home: Silent (9%), Boomers (16%), Gen X (25%), Millennials (11%)
- Past experience: Silent (3%), Boomers (3%), Gen X (6%), Millennials (3%)
- Only one I know of: Silent (11%), Boomers (12%), Gen X (11%), Millennials (11%)
- Referred by friend/family/co-worker: Silent (4%), Boomers (3%), Gen X (3%), Millennials (4%)
- Referred by employer: Silent (0%), Boomers (3%), Gen X (3%), Millennials (0%)
- Other/Don't know: Silent (11%), Boomers (17%), Gen X (11%), Millennials (11%)

n = 284
Almost Half of Respondents Had Not Been to Another Store Location

15% Were New to The Commuter Store®

I-Q5. Is this your first visit to any Commuter Store®?

- First Visit: 15%
- Visited only this Store: 47%
- Visited this and other Stores: 36%
- Visited only other Stores before: 1%

n = 559
First Time Visitors Come in for Different Reasons Than Repeat Customers

- Just interested in seeing what it's about: 36% (Repeat Customer) vs. 64% (First Visit)
- Looking for ways to make my commute better: 47% (Repeat Customer) vs. 53% (First Visit)
- Needed someplace to kill time: 50% (Repeat Customer) vs. 50% (First Visit)
- Needed information: 35% (Repeat Customer) vs. 66% (First Visit)
- Needed map/bus schedule/guide: 33% (Repeat Customer) vs. 67% (First Visit)
- Needed a fare card, tokens, ticket or pass: 11% (Repeat Customer) vs. 89% (First Visit)
- Other: 12% (Repeat Customer) vs. 88% (First Visit)

n = 559

I-Q5. Is this your first visit to any Commuter Store?

i-Q1. Why did you come into The Commuter Store® today?
Customers Go to Kiosks for Information, Schedules and Commute Assistance

- **Needed a fare card, tokens, ticket or pass**: 86% (Kiosk 70%, Store 17%)
- **Needed information**: 17% (Kiosk 8%, Store 8%)
- **Needed map/bus schedule/guide**: 15% (Kiosk 4%, Store 11%)
- **Looking for ways to make my commute better**: 9% (Kiosk 1%, Store 8%)
- **Needed someplace to kill time**: 4% (Kiosk 2%, Store 2%)
- **Just interested in seeing what it's about**: 2% (Kiosk 2%, Store 2%)
- **Other**: 2% (Kiosk 4%, Store 2%)

**i-Q1. Why did you come into The Commuter Store® today?**

*n = 559*
The 2012 Study Captured More Respondents Who Visit Multiple Stores

I-Q5. Is this your first visit to any Commuter Store®?

- 2007 n = 544
- 2009 n = 995
- 2012 n = 559
Crystal City Respondents Were the Most Likely to Report Visiting Only That Store

I-Q5. Is this your first visit to any Commuter Store?

- **First visit**
  - Ballston: 7%
  - Crystal City: 23%
  - Rosslyn: 18%
  - Shirlington: 17%
  - The Mobile Commuter Store: 23%

- **Visited only this Store**
  - Ballston: 5%
  - Crystal City: 71%
  - Rosslyn: 58%
  - Shirlington: 58%
  - The Mobile Commuter Store: 34%

- **Visited this and other Stores**
  - Ballston: 21%
  - Crystal City: 72%
  - Rosslyn: 23%
  - Shirlington: 19%
  - The Mobile Commuter Store: 43%

- **Visited only other Stores**
  - Ballston: 1%
  - Crystal City: 1%
  - Rosslyn: 1%
  - Shirlington: 1%
  - The Mobile Commuter Store: 6%
Implication

Almost a third of customers are new, and they may not be aware of all the information and services available at The Commuter Store®. Focus on promoting services to these new customers.
The Commuter Store® received very high satisfaction ratings.
I-Q3. How would you rate your overall experience on today's trip to The Commuter Store®?

- Excellent 10: 69%
- 9: 15%
- 8: 7%
- 7: 3%
- 6: 2%
- 5: 2%
- 4: 1%
- 3: 1%
- 2: 1%
- 1: 1%
- Poor 0: 84%

n = 563

84% of Respondents Rate Their Experience at The Commuter Store® a 9 or 10
The Commuter Store® Continues to Have High Customer Experience Ratings

- 2009: 90% Excellent, 8 - 12% 8 - 11%
- 2012: 91% Excellent, 9 - 15% 8 - 7%

2009 n = 282
2012 n = 563
Crystal City & Rosslyn Respondents Gave the Highest Experience Ratings, but All Locations Did Well

<table>
<thead>
<tr>
<th>Location</th>
<th>8</th>
<th>9</th>
<th>10 - Certain to Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballston</td>
<td>14%</td>
<td>18%</td>
<td>54%</td>
</tr>
<tr>
<td>Crystal City</td>
<td>5%</td>
<td>18%</td>
<td>73%</td>
</tr>
<tr>
<td>Rosslyn</td>
<td>3%</td>
<td>6%</td>
<td>86%</td>
</tr>
<tr>
<td>Shirlington</td>
<td>8%</td>
<td>11%</td>
<td>70%</td>
</tr>
<tr>
<td>The Mobile Commuter Store</td>
<td>6%</td>
<td>11%</td>
<td>72%</td>
</tr>
</tbody>
</table>

n = 563

I-Q3. How would you rate your overall experience on today’s trip to The Commuter Store®?
Customer Experience Ratings Are Stable and Remain High for All Locations

I-Q3. How would you rate your overall experience on today's trip to The Commuter Store®?

<table>
<thead>
<tr>
<th>Location</th>
<th>2009</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ballston</td>
<td>93%</td>
<td>86%</td>
</tr>
<tr>
<td>Crystal City</td>
<td>2009</td>
<td>96%</td>
</tr>
<tr>
<td>Rosslyn</td>
<td>2009</td>
<td>95%</td>
</tr>
<tr>
<td>The Mobile Commuter Store</td>
<td>2009</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>2012</td>
<td>90%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>89%</td>
</tr>
</tbody>
</table>

Percentage of respondents giving a rating of 8, 9 or 10.

Please Note: Shirlington was not part of the 2009 study.

n = 563
Store Customers Gave Higher Satisfaction Ratings to The Commuter Store®

Percentage of respondents giving a rating of 8, 9 or 10.

I-Q3. How would you rate your overall experience on today's trip to The Commuter Store®?

n = 284
More Than 8 out of 10 Respondents Are Certain to Return

A5. How likely are you to visit a Commuter Store® in the future?

- Certain to return: 73%
- 9: 10%
- 8: 5%
- 7: 2%
- 6: 2%
- 5: 4%
- 4: 2%
- 3: 0%
- Not at all likely to return: 83%
- Don't know: 2%

n = 284
Crystal City & Shirlington* Respondents Were the Most Likely to Say They Were Certain to Return

- Ballston: 7% Very Likely, 5% Somewhat Likely, 67% Very Unlikely, 79% Likely
- Crystal City: 4% Very Likely, 11% Somewhat Likely, 80% Very Unlikely, 95% Likely
- Rosslyn*: 11% Very Likely, 11% Somewhat Likely, 63% Very Unlikely, 85% Likely
- Shirlington*: 9% Very Likely, 18% Somewhat Likely, 73% Very Unlikely, 100% Likely
- The Mobile Commuter Store: 2% Very Likely, 10% Somewhat Likely, 69% Very Unlikely, 81% Likely

*Please use caution when interpreting the Shirlington & Rosslyn results because of low sample sizes for these locations.
Kiosk Customers Reported Being Slightly Less Likely to Return to The Commuter Store®

A5. How likely are you to visit a Commuter Store® in the future?

Percentage of respondents giving a rating of 8, 9 or 10.

n = 284
Implication

Celebrate and share your high satisfaction ratings!
Overall, The Commuter Store® has a very high Net Promoter Score of 72%.
78% of Respondents Are Likely to Recommend The Commuter Stores®

A4. How likely would you be to recommend The Commuter Store® to someone who needs information or products related to traveling around Arlington County?

- Not at all likely: 0%
- Extremely likely: 78%

n = 284
The **Net Promoter Score** Subtracts Detractors from Promoters

<table>
<thead>
<tr>
<th>0 - Not at all likely</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10 - Extremely likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>9%</td>
<td>13%</td>
<td>65%</td>
</tr>
</tbody>
</table>

**A4.** How likely would you be to recommend The Commuter Store® to someone who needs information or products related to traveling around Arlington County?
The Commuter Store® has a Net Promoter Score of 72%

- Percentage of Promoters (Rating 9 or 10): 78%
- Percentage of Detractors (Rating 0 to 6): 6%
- Net Promoter Score: 72%

The 2009 Net Promoter Score was 79%
Crystal City & Shirlington* Respondents Are the Most Likely to Say They Will Recommend The Commute Store®

A5. How likely are you to visit a Commuter Store® in the future?

- Ballston
  - 12% Extremely Likely
  - 57% Likely
  - 69% Very Likely

- Crystal City
  - 14% Extremely Likely
  - 70% Likely
  - 84% Very Likely

- Rosslyn* (Low sample size)
  - 11% Extremely Likely
  - 63% Likely
  - 74% Very Likely

- Shirlington*
  - 27% Extremely Likely
  - 55% Likely
  - 82% Very Likely

The Mobile Commuter Store
  - 12% Extremely Likely
  - 69% Likely
  - 81% Very Likely

n = 284

*Please use caution when interpreting the Shirlington & Rosslyn results because of low sample sizes for these locations
Net Promoter Scores Vary Slightly by Location, but Are High Across the Board

<table>
<thead>
<tr>
<th></th>
<th>Ballston</th>
<th>Crystal City</th>
<th>Rosslyn</th>
<th>Shirlington</th>
<th>The Mobile Commuter Store</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of Promoters</td>
<td>69%</td>
<td>84%</td>
<td>74%</td>
<td>82%</td>
<td>81%</td>
</tr>
<tr>
<td>(-) % of Detractors</td>
<td>12%</td>
<td>4%</td>
<td>8%</td>
<td>0%</td>
<td>10%</td>
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<tr>
<td>NPS</td>
<td>57%</td>
<td>80%</td>
<td>66%</td>
<td>82%</td>
<td>71%</td>
</tr>
</tbody>
</table>
Arlington County Commuter Services Has High Net Promoter Scores

<table>
<thead>
<tr>
<th>Service</th>
<th>Net Promoter Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Commuter Store™</td>
<td>72%</td>
</tr>
<tr>
<td>2007 ATP Services</td>
<td>61%*</td>
</tr>
<tr>
<td>2007 CommuterDirect.com (Individuals)</td>
<td>82%*</td>
</tr>
<tr>
<td>2007 CommuterDirect.com (Corporate)</td>
<td>96%*</td>
</tr>
<tr>
<td>2011 BikeArlington</td>
<td>58%*</td>
</tr>
<tr>
<td>2011 WalkArlington</td>
<td>49%*</td>
</tr>
<tr>
<td>2008 ART</td>
<td>84%*</td>
</tr>
</tbody>
</table>

*Note: Net Promoter Score for these studies was calculated using a 5-point scale. Beginning with the 2009 Commuter Store Study, this is being updated to the appropriate 11-point scale. Score differences between the scales are minor.
Leverage promoters to spread the word about The Commuter Store®.
Overall, customers are very happy with the shopping experience, but a third would like to see extended hours – particularly at the Mobile Store.
The Commuter Stores® Scored High on All Aspects of the Store Experience

- It's easy to find my way around in the store*: 14% 14% 14% 14% 14%
- The sound level is about right*: 24% 24% 24% 24% 24%
- This store is easy to find: 17% 17% 17% 17% 17%
- The location of the store is convenient to my work or home: 13% 13% 13% 13% 13%
- The lighting is about right*: 29% 29% 29% 29% 29%
- It is a pleasant location in which to shop: 18% 18% 18% 18% 18%
- The store hours are convenient for my schedule: 18% 18% 18% 18% 18%

* These questions were not asked of shoppers at the Ballston or Shirlington locations

n = 284

A15. To what extent do you agree with the following statements regarding this particular Commuter Store®?
Customers Said Lots of Great Things About Their Experiences at The Commuter Store®

I enjoyed my trip to the Commuter Store. It was swift and I did not have to wait. (Crystal City Store)

I don't usually pass by around here, but now that I'm aware of the commuter stores I'll make sure to pass by and inquire about the products and services. I'll start commuting from Leesburg to Arlington so I need to start preparing. (Shirlington Store)

Please have a day in NW Washington DC by the Court House or Judiciary Square Metro Station. (Mobile Store)

Employees were friendly and helpful. (Rosslyn Store)

The people I have dealt with by phone and in person have always been VERY polite and VERY helpful every time. Very professional staff everywhere. (Ballston Store)
Respondents Rated Ballston Highest in Terms of Being an Easy to Find Location

- This store is easy to find: 12% Strongly disagree, 81% Strongly agree, 93% Agree.
- The store hours are convenient for my schedule: 18% Strongly disagree, 77% Strongly agree, 89% Agree.
- The location of the store is convenient to my work or home: 11% Strongly disagree, 77% Strongly agree, 88% Agree.
- It is a pleasant location in which to shop: 11% Strongly disagree, 67% Strongly agree, 78% Agree.

n = 73

A15. To what extent do you agree with the following statements regarding this particular Commuter Store?
Crystal City Shoppers Rate This Location Highly on All Elements, Particularly Finding Their Way Around in the Store

<table>
<thead>
<tr>
<th>Statement</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's easy to find my way around in the store*</td>
<td>18%</td>
<td>77%</td>
<td></td>
<td></td>
<td></td>
<td>95%</td>
</tr>
<tr>
<td>It is a pleasant location in which to shop</td>
<td>26%</td>
<td>66%</td>
<td></td>
<td></td>
<td></td>
<td>92%</td>
</tr>
<tr>
<td>The sound level is about right*</td>
<td>29%</td>
<td>62%</td>
<td></td>
<td></td>
<td></td>
<td>91%</td>
</tr>
<tr>
<td>The location of the store is convenient to my work or home</td>
<td>17%</td>
<td>71%</td>
<td></td>
<td></td>
<td></td>
<td>88%</td>
</tr>
<tr>
<td>This store is easy to find</td>
<td>24%</td>
<td>61%</td>
<td></td>
<td></td>
<td></td>
<td>85%</td>
</tr>
<tr>
<td>The lighting is about right*</td>
<td>31%</td>
<td>52%</td>
<td></td>
<td></td>
<td></td>
<td>83%</td>
</tr>
<tr>
<td>The store hours are convenient for my schedule</td>
<td>21%</td>
<td>60%</td>
<td></td>
<td></td>
<td></td>
<td>81%</td>
</tr>
</tbody>
</table>

n = 122

A15. To what extent do you agree with the following statements regarding this particular Commuter Store?
All Rosslyn Respondents Say the Location Is Convenient to Their Home or Work

A15. To what extent do you agree with the following statements regarding this particular Commuter Store?

- The location of the store is convenient to my work or home
- It’s easy to find my way around in the store
- The sound level is about right
- The lighting is about right
- This store is easy to find
- It is a pleasant location in which to shop
- The store hours are convenient for my schedule

n = 26
Actual numbers shown due to small sample size

Southeastern Institute of Research
Just Over Half of Shirlington Customers Rated It High on All Aspects of the Shopping Experience

<table>
<thead>
<tr>
<th>Statement</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>The location of the store is convenient to my work or home</td>
<td>6</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>This store is easy to find</td>
<td>6</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It is a pleasant location in which to shop</td>
<td>1</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The store hours are convenient for my schedule</td>
<td>2</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

n = 11

Actual numbers shown due to small sample size

A15. To what extent do you agree with the following statements regarding this particular Commuter Store?

Southeastern Institute of Research
Customers at The Mobile Commuter Store® Are Satisfied with the Shopping Experience, but Would Like More Convenient Hours

- This store is easy to find: 16% strongly agree, 71% agree, 4% neutral, 14% disagree, 24% strongly disagree
- The location of the store is convenient to my work or home: 10% strongly agree, 71% agree, 14% neutral, 24% disagree, 16% strongly disagree
- The lighting is about right*: 24% strongly agree, 57% agree, 25% neutral, 15% disagree, 4% strongly disagree
- It is a pleasant location in which to shop: 14% strongly agree, 65% agree, 10% neutral, 10% disagree, 5% strongly disagree
- It’s easy to find my way around in the store*: 4% strongly agree, 73% agree, 10% neutral, 4% disagree, 2% strongly disagree
- The sound level is about right*: 18% strongly agree, 57% agree, 10% neutral, 9% disagree, 6% strongly disagree
- The store hours are convenient for my schedule: 12% strongly agree, 53% agree, 10% neutral, 8% disagree, 6% strongly disagree

A15. To what extent do you agree with the following statements regarding this particular Commuter Store?

n = 51

Southeastern Institute of Research
Stores Are a More Pleasant Location to Shop, but Kiosks Have More Convenient Hours

- It is a pleasant location in which to shop: 87% Store, 75% Kiosk
- The location of the store is convenient to my work or home: 86% Store, 83% Kiosk
- This store is easy to find: 85% Store, 88% Kiosk
- The store hours are convenient for my schedule: 76% Store, 85% Kiosk

A15. To what extent do you agree with the following statements regarding this particular Commuter Store?
Almost Two-Thirds of Respondents Feel the Current Store Hours Are Fine, Yet a Third Would Like to See Changes

A19. Which of the following describes how you feel about the hours of the Commuter Store®?

- The current store hours are fine (63%)
- The stores should open earlier in the morning (22%)
- The stores should stay open later in the evening (13%)
- The stores need more weekend hours (13%)

n = 284

About a quarter of non-residents said they would like the Stores to open earlier. Most respondents who gave a time said 7 a.m. or 8 a.m.
Overall, customers are happy with the shopping experience, but you may want to experiment with hours, especially at The Mobile Store.
The Commuter Store® staff receive very high ratings in terms of knowledge, helpfulness and professionalism.
Store Staff Was Rated Highly

- The staff is helpful: 20% strongly agree, 67% agree, 87% total agreement.
- The staff is knowledgeable about products and information provided: 19% strongly agree, 68% agree, 87% total agreement.
- The staff is professional: 20% strongly agree, 65% agree, 85% total agreement.

A26. Next, think about the customer service in the Store. How strongly do you agree with the following statements regarding the staff in this particular Commuter Store?
Over Three-Quarters of Respondents Found the Ballston Staff Helpful, Knowledgeable and Professional

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree 4</th>
<th>Agree 5</th>
<th>Total Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The staff is helpful</td>
<td>19%</td>
<td>59%</td>
<td>78%</td>
</tr>
<tr>
<td>The staff is knowledgeable about products</td>
<td>26%</td>
<td>56%</td>
<td>82%</td>
</tr>
<tr>
<td>and information provided</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The staff is professional</td>
<td>23%</td>
<td>53%</td>
<td>76%</td>
</tr>
</tbody>
</table>

Graph shows Ballston respondents only.

n = 73

A26. Next, think about the customer service in the Store. How strongly do you agree with the following statements regarding the staff in this particular Commuter Store?
Some Comments About Ballston Staff

The staff that I deal with name is Darlene and she is very professional.

Just tell the Ballston staff to keep up the good work.

Again, the professional way the staff handled all my problems was very appreciated.
9 in 10 Crystal City Respondents Rated Staff Very Highly

- The staff is helpful: 23% strongly agree, 68% agree, 91% total.
- The staff is knowledgeable about products and information provided: 17% strongly agree, 72% agree, 89% total.
- The staff is professional: 23% strongly agree, 66% agree, 89% total.

Graph shows Crystal City respondents only.

n = 120

A26. Next, think about the customer service in the Store. How strongly do you agree with the following statements regarding the staff in this particular Commuter Store?
Comments About the Crystal City Staff

The ladies who work in the Arlington location are very personable and always helpful and sociable/polite. Kudos to them!

Staff is always pleasant and helpful!

If they don't have what I need they print it and in the past they have called other stores to get the facts.

Iris and the other Lady have always tried to assist me in every way they know how. Really helpful when everyone had to switch from paper to electronic vouchers.
Almost All Customers at the Rosslyn Location Rated the Staff Highly on All Dimensions

The staff is helpful

- 4 strongly agree
- 21 agree

The staff is knowledgeable about products and information provided

- 5 strongly agree
- 20 agree

The staff is professional

- 3 strongly agree
- 23 agree

Graph shows Rosslyn respondents only.

n = 26

Actual numbers shown due to small sample size

A26. Next, think about the customer service in the Store. How strongly do you agree with the following statements regarding the staff in this particular Commuter Store?
Comments About the Rosslyn Location

Excellent service.

The staff are able to explain the complicated system and help resolve payment issues.

The Commuter Store in Rosslyn is a perfect 10.
The Shirlington Location Scored High Across All Dimensions

- The staff is helpful
- The staff is knowledgeable about products and information provided
- The staff is professional

Graph shows Shirlington respondents only. 

n = 11

Actual numbers shown due to small sample size

A26. Next, think about the customer service in the Store. How strongly do you agree with the following statements regarding the staff in this particular Commuter Store?
89% of Respondents at The Mobile Commuter Store Say the Staff Was Helpful

- The staff is helpful: 14% strongly agree, 75% agree, 89% total
- The staff is knowledgeable about products and information provided: 14% strongly agree, 73% agree, 87% total
- The staff is professional: 14% strongly agree, 69% agree, 83% total

A26. Next, think about the customer service in the Store. How strongly do you agree with the following statements regarding the staff in this particular Commuter Store?

Graph shows Mobile Commuter Store respondents only.

n = 51
While Overall Staff Ratings Are High, They Are Higher at Store Locations

Bars show the percentage rating the item a 4 or 5 on a 5-point scale.

A26. Next, think about the customer service in the Store. How strongly do you agree with the following statements regarding the staff in this particular Commuter Store?

- The staff is helpful
- The staff is knowledgeable about products and information provided
- The staff is professional

n = 284
Implication

Congratulate your staff! They received very high scores for their service.
Slightly more than half of respondents say that they made some sort of change after starting to use The Commuter Store®. And many say that information, services or benefits they received from The Commuter Store® helped in that change.
Overall, Many Respondents Said They Made a Change to How They Get Around Arlington and Metro DC Since Using The Commuter Store®

I-Q7. Since you first started going to The Commuter Store®, have you made any of the following changes in how you get around Arlington County and the Washington metropolitan region?

- Started riding train or ride train more often: 27%
- Started riding bus or ride bus more often: 19%
- Started walking to destinations or walk to destinations more often: 4%
- Started carpooling or carpool more often: 1%
- Started bicycling to destinations or bicycle to destinations more often: 1%
- Other: 1%
- No, I did not make any changes: 46%

n = 568
Travel Changes Vary by Store Location

Started riding train or ride train more often
- Ballston: 16%
- Crystal City: 13%
- Rosslyn: 16%
- Shirlington: 5%
- The Mobile Commuter Store: 43%

Started riding bus or ride bus more often
- Ballston: 5%
- Crystal City: 8%
- Rosslyn: 13%
- Shirlington: 1%
- The Mobile Commuter Store: 49%

Started walking to destinations or walk to destinations more often
- Ballston: 1%
- Crystal City: 2%
- Rosslyn: 5%
- Shirlington: 1%
- The Mobile Commuter Store: 30%

Started carpooling or carpool more often
- Ballston: 1%
- Crystal City: 2%
- Rosslyn: 1%
- Shirlington: 2%
- The Mobile Commuter Store: 8%

Started bicycling to destinations or bicycle to destinations more often
- Ballston: 5%
- Crystal City: 1%
- Rosslyn: 0%
- Shirlington: 0%
- The Mobile Commuter Store: 3%

Other
- Ballston: 1%
- Crystal City: 0%
- Rosslyn: 0%
- Shirlington: 2%
- The Mobile Commuter Store: 2%

No, I did not make any changes
- Ballston: 20%
- Crystal City: 44%
- Rosslyn: 41%
- Shirlington: 55%
- The Mobile Commuter Store: 64%

n = 568

I-Q7. Since you first started going to The Commuter Store®, have you made any of the following changes in how you get around Arlington County and the Washington metropolitan region?
Work Travel
More Respondents Reported Using Commuter Train to Get to Work** Than in 2009 — Drive Alone and Metrorail Use Decreased

**Please note: The greatest number of respondents came from the Crystal City location, and this impacts mode choice.

C4. What type of transportation do you typically use to get to work?
Primary Mode Varies Based on Store Location, but Ballston Has the Highest Drive Alone Rate at 9%

C4. What type of transportation do you typically use to get to work?

- **Metrorail**: Ballston 13%, Crystal City 7%, The Mobile Commuter Store 7%
- **Commuter train (MARC, VRE, Amtrak)**: Ballston 2%, Crystal City 0%, The Mobile Commuter Store 0%
- **Bus**: Ballston 9%, Crystal City 3%, The Mobile Commuter Store 2%
- **Drive alone**: Ballston 29%, Crystal City 13%, The Mobile Commuter Store 13%
- **Carpool (ride with co-workers, friends or family members)**: Ballston 2%, Crystal City 1%, The Mobile Commuter Store 1%
- **Bicycle (most of the trip from home to work)**: Ballston 4%, Crystal City 2%, The Mobile Commuter Store 2%
- **Other**: Ballston 3%, Crystal City 3%, The Mobile Commuter Store 3%

n = 239
Looking at Secondary Modes to Work, Metrorail, Drive Alone and Bus Are the Most Common Modes Used

C5. Do you ever use any of the following other types of transportation to get to work?

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

2009 n = 288
2012 n = 284

Southeastern Institute of Research
Thinking About Travel to Work, Respondents Who Made a Change Said They Started Riding the Train or Bus or They Ride It More Often

- Started riding train to work: 13%
- Ride train to work more often: 17%
- Started riding bus to work: 7%
- Ride bus to work more often: 9%
- Started riding bicycle to work: 1%
- Ride bicycle to work more often: 1%
- Started walking to work: 2%
- Walk to work more often: 2%
- Started teleworking: 3%
- Telework more often: 2%
- Other (please specify): 3%
- No, I did not make any of these changes: 43%

43% of respondents made at least one change

n = 284

B1. Since you first started going to The Commuter Store®, have you made any of the following changes in how you travel to work?
Over One-Third of Respondents Said The Commuter Store® Helped Them to Make a Change to Their Work Travel

B3. Did any information, service or benefit you received from The Commuter Store® influence you or assist you to make this change?

- Yes: 36%
- No: 54%
- Don’t know: 10%

n = 117
4 out of 10 Respondents Who Changed Modes Shifted from Driving Alone

B5. How did you typically travel to work before you made this change?

- Drove alone all or most days: 40%
- Rode a train or bus all or most days: 37%
- Carpoled or vanpoled all or most days: 7%
- Walked all or most days: 3%
- Teleworked all or most days: 2%
- Didn’t work then: 5%
- Other: 7%

n = 117

Common reasons for making a change include high cost of gas and parking, convenience and job changes.
Non-Work Travel
Since you first started going to The Commuter Store®®, have you made any of the following changes in how you make non-work trips around Arlington or around the Washington metropolitan region?

- Started riding train: 8%
- Ride train more often: 15%
- Started riding bus: 8%
- Ride bus more often: 13%
- Started riding bicycle to destinations: 2%
- Ride bicycle to destinations more often: 1%
- Started walking to destinations: 3%
- Walk to destinations more often: 4%
- Other: 1%
- No, I did not make any of these changes: 56%

38% of respondents made at least one change.

B6. Since you first started going to The Commuter Store®, have you made any of the following changes in how you make non-work trips around Arlington or around the Washington metropolitan region?
4 out of 10 Respondents Who Shifted Their Non-Work Travel Mode Say The Commuter Store® Helped with the Change

B8. Did any information, service or benefit you received from The Commuter Store® influence you or assist you to make this change?

Yes 40%
No 39%
Don’t know or don’t remember 22%

n = 106
Implication

Continue the great work! Respondents tell us you are helping them to reduce SOV trips.
Most Ballston respondents say the new location is better than the previous one, and you are getting new customers.
About Two-Thirds of Respondents at the Ballston Location Had Visited the Store When It Was in the Mall

A17. Did you ever visit the Ballston Commuter Store when it was in the mall?

Yes 64%
No 36%

n = 73
Overall, the Majority of Ballston Shoppers Feel the New Location Is Convenient and Provides a Better Shopping Experience

A18. Please rate the new store compared to the old store on the following factors

- The convenience of the location
  - 13%
  - 62%
  - 75%

- Overall shopping experience
  - 23%
  - 47%
  - 70%

- Obtaining the items I need (e.g., passes, schedules, etc.)
  - 19%
  - 47%
  - 66%

n = 47
Fewer Than 2 in 10 Respondents Rate the New Location Far Worse on Any Element

A18. Please rate the new store compared to the old store on the following factors:

- Obtaining the items I need (e.g., Passes, schedules, etc.):
  - 4% rate it far worse
  - 6% rate it worse
  - 10% rate it the same
  - 6% rate it better
  - 11% rate it far better

- Overall shopping experience:
  - 9% rate it far worse
  - 6% rate it worse
  - 15% rate it the same
  - 17% rate it better

- The convenience of the location:
  - 6% rate it far worse
  - 11% rate it worse
  - 17% rate it the same
Implication

Consider the move to the Ballston kiosk location a success!
Four in ten respondents only buy tickets from The Commuter Store® and 15% only get information at The Commuter Store®.
A12. Do you typically purchase transit passes, tokens or tickets through any sources other than The Commuter Store®?
Customers Who Come in for Reasons Other Than to Purchase Tickets Offer an Opportunity to Create Regular Customers

<table>
<thead>
<tr>
<th>I do not typically purchase transit passes, tokens or tickets</th>
<th>Purchase Intent</th>
<th>Other Intent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Intent: 22%</td>
<td>Other Intent: 28%</td>
<td></td>
</tr>
<tr>
<td>I only purchase transit passes, tokens or tickets through The Commuter Store</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online at WMATA.com</td>
<td>Purchase Intent: 6%</td>
<td>Other Intent: 10%</td>
</tr>
<tr>
<td>At a VRE ticket kiosk</td>
<td>Purchase Intent: 7%</td>
<td>Other Intent: 5%</td>
</tr>
<tr>
<td>Online at CommuterDirect.com</td>
<td>Purchase Intent: 3%</td>
<td>Other Intent: 10%</td>
</tr>
<tr>
<td>Through another source</td>
<td>Purchase Intent: 2%</td>
<td>Other Intent: 8%</td>
</tr>
<tr>
<td>At the VRE sales office</td>
<td>Purchase Intent: 3%</td>
<td>Other Intent: 0%</td>
</tr>
<tr>
<td>Through my employer</td>
<td>Purchase Intent: 2%</td>
<td>Other Intent: 3%</td>
</tr>
<tr>
<td>Online through another website</td>
<td>Purchase Intent: 0%</td>
<td>Other Intent: 5%</td>
</tr>
<tr>
<td>With an agent at an Amtrak ticket counter</td>
<td>Purchase Intent: 1%</td>
<td>Other Intent: 3%</td>
</tr>
<tr>
<td>At an Amtrak Quick-Trak kiosk</td>
<td>Purchase Intent: 1%</td>
<td>Other Intent: 0%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>Purchase Intent: 3%</td>
<td>Other Intent: 15%</td>
</tr>
</tbody>
</table>

n = 284

A12. Do you typically purchase transit passes, tokens or tickets through any sources other than The Commuter Store®?
A13. Do you typically look for local travel information through any sources other than The Commuter Store®?

- I don't typically look for local travel information: 31%
- Online at WMATA.com: 26%
- I only use The Commuter Store for local travel information: 15%
  - Online at VRE.org: 12%
  - Online at CommuterDirect.com: 8%
  - Online through another website: 8%
  - Online at mta.maryland.gov: 6%
- At a train station or bus stop: 5%
- Friends, family or co-workers (referral): 4%
- Online at CommuterPage.com: 3%
- Another source: 3%
- Through my employer: 2%
- Don't know: 4%

n = 284
Customers Who Come to The Commuter Store® for Information Tend to Also Get Local Travel Information from Live Sources, Such as Friends and Family

A12. Do you typically purchase transit passes, tokens or tickets through any sources other than The Commuter Store®?

- I don't typically look for local travel information
- Online at WMATA.com
- Online at VRE.org
- Online at CommuterDirect.com
- Online through another website
- Online at mta.maryland.gov
- At a train station or bus stop
- Friends, family or co-workers (referral)
- Online at CommuterPage.com
- Another source
- Through my employer

n = 284
Implication

Customers get tickets and information from a variety of sources, but those who come in for tickets are very loyal and this should be leveraged.
Summary of Implications
• Continue to leverage relationships with employers since they are a major (and growing) referral source. Determine if it is important that customers know who operates The Commuter Stores®.

• There is an opportunity to further promote The Commuter Store®’s travel information services.

• Almost a third of customers are new, and they may not be aware of all the information and services available at The Commuter Store®. Focus on promoting services to these new customers.

• Celebrate and share your high satisfaction ratings!

• Leverage promoters to spread the word about The Commuter Store®.
• Overall, customers are happy with the shopping experience, but you may want to experiment with hours, especially at the Mobile Store.

• Congratulate your staff! They received very high scores for their service.

• Continue the great work! Respondents tell us you are helping them to reduce SOV trips.

• Consider the move to the Ballston kiosk location a success!

• Customers get tickets and information from a variety of sources, but those who come in for tickets are very loyal and this should be leveraged.
Next Step: Leverage the Panel
28% of Respondents Joined the ACCS Research Panel

Yes 28%
No 72%

n = 282
For Additional Information on This Study Contact:

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