Arlington County
2012 Business Leaders Study
November 2012

Prepared by

LDA Consulting

Southeastern Institute of Research
Project Objectives
Project Objectives

• Determine factors critical in the success of Arlington County’s master transportation plan.
• Understand the current and projected needs of the business community in terms of transportation programs and services.
• Assess the quality of transportation facilities and services in Arlington County.
• Gauge the extent to which transportation services and facilities support the overall success of Arlington County’s business community.
Methodology

Phase I – Conduct focus group conversations with members of the Arlington business community.

Phase II – Conduct a 12-minute online survey with a representative sample of those in the Arlington business community.
Phase I Methodology
Focus Groups

• The following focus groups were held in late November and early December of 2011:
  – 2 Retail and small business
  – 2 Hotel
  – 2 C-level executives
  – 1 Developer

• In total, 34 people attended
  – A variety of businesses were represented
  – Representatives from several BIDs attended
In terms of overall business climate, Arlington may be faring better than other locations, but there are still concerns and uncertainty surrounding the future.

Transportation options set Arlington apart, but may not be available to all Arlington workers.

Mixed-use development gives life to the area and reduces traffic, but business leaders want to make sure transportation is integrated into the development process.

Some business leaders feel Arlington’s identity is unclear.

Smart growth has set Arlington apart, yet the business community recognizes public transportation options and capacity need to grow with population growth.
Focus Group Summary of Findings (2 of 2)

- There is a perceived need for better coordination throughout the region.
- Respondents express a number of parking needs, including more parking, better signage and more handicapped accessible parking.
- Safety is a concern and is seen as a shared responsibility.
- Tax policies may be creating a disadvantage to Arlington-based businesses.
- There is room for improvement in the relationship between developers and the County.
Phase II
Methodology
Survey Methodology

• A 15-minute questionnaire was designed by Arlington County Commuter Services, SIR and LDA Consulting.

• 212 completes
  – 146 came from email invitation
  – 33 came from BID links
    • Ballston = 3
    • Crystal City = 8
    • Rosslyn = 22
  – 33 came from letter invitation

• Survey classification
  – 35 Residential and Commercial Developers
  – 156 C-Class Business Leaders
  – 21 HR Business Leaders

• The fieldwork was conducted from August 15 to November 15, 2012.
Sample Generation – Email Invites

- 1,766 Arlington County business leaders were invited by the Arlington Department of Environmental Services, Division of Transportation & Development, to participate in the study via an initial mail letter.
  - The survey invitation letter was signed by Dennis Leach, Transportation Director.
  - The business leader contacts came from four sources, and the lists were de-duplicated. The sources are:
    - Arlington Transportation Partners
    - Arlington Economic Development
    - Retail Partners
    - Contact information was provided for 17 developers
  - Recipients were given a link to connect to the online survey, either via the mailed out letter or an email invitation for those with an email address.
Sample Generation – BID Links

• Additionally, unique links were set up for three Business Improvement Districts, which were responsible for contacting their members and inviting them to take the online survey. The three BIDs are:
  – Ballston
  – Crystal City
  – Rosslyn
Sample Generation – Reminder Emails and Phone Calls

- Reminder emails were sent to all non-respondents from the contact list with emails; also, telephone calls were attempted with non-responders.
  - 754 contacts did not have an email address and were not contacted beyond the initial letter
  - 1,012 emails were sent to those who had email addresses
  - 357 of those 1,012 emails had bad contact information
Survey Sample
Business Leader Survey Versions

• Of the estimated 700 viable contacts who were reachable by current and valid email or physical addresses, a 30% response rate (212 completes) was achieved as follows:

  – Developers
    • 35 total respondents
    • Referred to as “D” in report
  – HR Professionals
    • 21 total respondents
    • Referred to as “H” in report
  – C-level
    • 156 total respondents
    • Referred to as “C” in report
Phase II Respondent Profiles
A1. Please select the category that best describes your organization.

- Business office: 32%
- Non-profit organization: 25%
- Property development: 17%
- Other: 15%
- Restaurant: 5%
- Hotel: 4%
- Retail business: 3%

2012 n = 212
H, D, C
A2. Please select the phrase that best describes your position:

- Chairman, Owner, President: 2012 = 24%, 2007 = 21%
- Director, Exec Director: 2012 = 21%, 2007 = 21%
- VP, Exec VP: 2012 = 13%, 2007 = 13%
- CEO, CFO: 2012 = 17%, 2007 = 16%
- Other: 2012 = 12%, 2007 = 15%
- GM: 2012 = 7%, 2007 = 13%
- Property Mgr.: 2012 = 10%, 2007 = 10%
- HR Professional: 2012 = 10%, 2007 = 10%

2012 n = 212  
H, D, C  
2007 n = 120
Tenure of Business in Arlington County

A1-D, A3-H, C. How long has your organization been developing/been located in Arlington County?

- More than 20 years: 34% (2012) 37% (2007)
- 16 - 20 years: 12% (2012) 16% (2007)
- 6 - 10 years: 17% (2012) 14% (2007)
- 1 - 5 years: 13% (2012) 18% (2007)
- Less than 1 year: 3% (2012) 1% (2007)

2012 n = 212
H, D, C
2007 n = 119
Businesses’ Locations in Arlington

- Rosslyn: 23%
- Crystal City/National Airport: 20%
- Ballston: 19%
- Clarendon: 15%
- Court House: 13%
- Pentagon/Pentagon City: 7%
- North Arlington: 7%
- Columbia Pike: 7%
- Virginia Square: 5%
- South Arlington: 4%
- Shirlington: 4%
- East Falls Church: 3%
- Other: 3%

F2-H. G2-C. Please select the area(s) that best describes the location(s) of your [worksites; stores of establishments; properties] in Arlington County. Please check all that apply.
Development in Arlington County

In what areas have you developed properties over the past five years? Please check all that apply.

- Crystal City/National Airport: 23%
- Rosslyn: 20%
- Ballston: 20%
- North Arlington: 11%
- Virginia Square: 11%
- Clarendon: 9%
- Columbia Pike: 9%
- South Arlington: 6%
- Court House: 3%
- Shirlington: 3%
- Pentagon/Pentagon City: None reported
- East Falls Church: 3%
- Columbia Pike: 9%
- South Arlington: 6%
- Court House: 3%
- Shirlington: 3%
- Pentagon/Pentagon City: None reported
- Other: 17%

Caution! Small sample size.

Developers Only
n = 35
In 2012, businesses report an average of 1.3 business locations in the County.

Top Business Locations – 2012 vs. 2007

- **Rosslyn**: 2012: 23%, 2007: 23%
- **Crystal City/National Airport**: 2012: 20%, 2007: 14%
- **Ballston**: 2012: 19%, 2007: 17%
- **Clarendon**: 2012: 15%, 2007: 10%
- **Court House**: 2012: 13%, 2007: 8%

In 2012, businesses report an average of 1.3 business locations in the County.

F2-H. G2-C. Please select the area(s) that best describes the location(s) of your [worksites; stores of establishments; properties] in Arlington County. Please check all that apply.
F2-H. G2-C. Please select the area(s) that best describes the location(s) of your [worksites; stores of establishments; properties] in Arlington County. Please check all that apply.
F4-H. G4-C. What is the primary work or business of your organization?

<table>
<thead>
<tr>
<th>Business Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-profit organization/association</td>
<td>23%</td>
</tr>
<tr>
<td>Business, personnel, or professional</td>
<td>12%</td>
</tr>
<tr>
<td>Hospitality, restaurants, hotels, tourism</td>
<td>10%</td>
</tr>
<tr>
<td>Technology consulting</td>
<td>9%</td>
</tr>
<tr>
<td>Education</td>
<td>6%</td>
</tr>
<tr>
<td>Retail or wholesale trade</td>
<td>5%</td>
</tr>
<tr>
<td>Defense contracting</td>
<td>5%</td>
</tr>
<tr>
<td>Banking finance, insurance, real estate</td>
<td>3%</td>
</tr>
<tr>
<td>Public administration, government</td>
<td>2%</td>
</tr>
<tr>
<td>Public utility or transportation</td>
<td>2%</td>
</tr>
<tr>
<td>Hospital, medical services</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>19%</td>
</tr>
</tbody>
</table>

n = 164
H, C
Organization Types

- Private company: 52%
- Non-profit/trade: 35%
- Federal government agency: 4%
- Local government agency: 3%
- State government agency: 1%
- Other: 2%

Half of survey respondents represent a private company, while an additional third represent a non-profit organization or trade association.

n = 164
H, C
Restaurant/Retail and Hotel not shown

F5-H. G5-C. Which of the following best describes your organization type?
Business Leader
Commuting Habits
Business leaders are more likely than are other Arlington workers to live in Arlington County. But a higher share of business leaders (62%) drive alone to work, compared with the drive alone rate of all Arlington workers (55%).
About a third (35%) of business leaders working in Arlington County reside in the County, compared with only 22% of all Arlington workers.

F8-H. F3-D. G10-C. In which of the following areas do you live?

- Virginia - outside of Arlington: 37%
- Maryland: 11%
- North Arlington: 10%
- District of Columbia: 7%
- Ballston: 5%
- South Arlington: 5%
- Clarendon: 4%
- Columbia Pike: 3%
- Crystal City/National Airport: 3%
- East Falls Church: 3%
- Court House: 2%

n = 193
H, D, C
Six in ten business leaders surveyed reported commuting to work in single occupancy vehicles. This was slightly higher than the 55% of all Arlington workers who drive alone to work.

Business Leaders’ Commute Mode

- Drive Alone: 62%
- Metrorail: 7%
- Carpool: 7%
- Walk: 7%
- Bicycle: 6%
- Telework: 4%
- Other: 3%
- Bus: 2%
- Commuter Train: 1%
- Vanpool: 1%

n = 163
H, C

F9-H. G11-C. What type of transportation do you typically use to get to work? Please choose only the one type you use most days in a typical week for the longest distance part of your trip.
There may be a “PR story” in the fact that AC business leaders’ commute mode split mirrors the entire County. Business leaders are leading the way. They can help the County move towards 40/60.

It is critical that AC continue to educate business leaders about the benefits of non-SOV travel; as they gain more information, they will be more likely, if not to change their own travel habits, to provide information to employees, impacting a positive trend towards sustainable travel.
Overall Business Satisfaction
Even though most business leaders reside outside of the County, they have a positive perception of Arlington County, both as a place to live and as a place to conduct business. A large share also rate QOL higher than for other parts of the Washington metro area.
Almost all business leaders rate the quality of life in Arlington County as very good or excellent. Further, they tend to rate the quality of life as significantly better than that of other metro D.C. areas and other metro areas in the U.S.

n = 212
H, D, C
‘Top 2’ refers to answers 4 + 5 while ‘Bottom 3’ refers to answers 1, 2 and 3.

B1. Overall, how would you rate the quality of life in Arlington County?
Quality of Life in Arlington County

Compared to:

Other areas in the Greater Washington region

- 50% much better
- 22% slightly better
- 72% not much difference

The United States

- 48% much better
- 32% slightly better
- 80% not much difference

4 5 - Quality of life in Arlington is much better

B2. How does the quality of life in Arlington County compare to the quality of life in each of the following?
B3. How would you rate the overall business climate in Arlington County?

- **Top 2**: 73% (answers 4 + 5)
- **Bottom 3**: 27% (answers 1, 2, and 3)

Similarly, the business climate in Arlington County is considered to be very good to excellent, significantly better than U.S. metro areas and tending toward better than the average D.C. metro area.

\[ n = 191 \]
\[ D, C \]

‘Top 2’ refers to answers 4 + 5 while ‘Bottom 3’ refers to answers 1, 2, and 3.
Qualitative research participants expressed opinions that the business climate in Arlington County is better than average despite economic uncertainty resulting in large part from BRAC impacts.

B4. How does the overall business climate in Arlington County compare to the overall business climate in each of the following?

- Other areas in the Greater Washington region:
  - 45% better than average
  - 13% much better
  - 58% no change

- The United States:
  - 46% better than average
  - 24% much better
  - 70% no change

n = 191 D, C
Despite economic concerns, over half of developers still consider Arlington County to be a better than average place to develop both residential and commercial projects.

Thinking about the number of parking spaces for a new development, developers prefer:

- **Minimum #**
  - 24%
- **Maximum #**
  - 12%
- **# range**
  - 65%

! Caution! Small Sample Size

n = 35

C1. Next, considering all factors that are important to your organization when looking at a place to develop/locate your business, how would you rate Arlington County?

C4. Overall, how would you rate Arlington County as a place to develop the following?
In general, developers and business leaders are less positive about Arlington County as a business location than they were five years ago, in part due to economic concerns.

C1-D. B10-C. Next, considering all factors that are important to your organization when looking at a place to develop/locate your business, how would you rate Arlington County?
Reasons for Arlington Business Rating

Great place/amenities: 27%
Accessibility/transportation: 22%
Retaining qualified workforce: 17%
Great location: 15%
Expensive: 14%
Area economy: 7%
Quality workforce: 5%
Regulations: 5%
Average/in the middle: 5%
Other: 34%

Arlington County is praised for its transportation system and the effective tie-in to the Metro, allowing residents and workers accessibility to the entire D.C. area.

B11. Why did you give that rating?

n = 130
Four in ten respondents anticipate the business climate and the quality of life in Arlington County to continue to improve.

40% of developers say there are far fewer vacancies at their properties today compared to a year ago.

B6

B7. How do you predict each of the following will change in the next five years?

- Occupied properties (D only, n = 35)
  - 34% will stay the same
  - 11% will get significantly better
  - 45% will get worse

- Business climate in Arlington
  - 32% will stay the same
  - 7% will get significantly better
  - 39% will get worse

- Quality of life in Arlington
  - 34% will stay the same
  - 7% will get significantly better
  - 41% will get worse
Five Year Prediction for Arlington’s Business Climate and Quality of Life

Occupied Properties (D only n = 35)
- Worse: 17%
- The Same: 37%
- Better: 45%

Business Climate in Arlington
- Worse: 13%
- The Same: 47%
- Better: 39%

Quality of Life in Arlington
- Worse: 5%
- The Same: 53%
- Better: 41%

B7. How do you predict each of the following will change in the next five years?

n = 191, D, C
Business leaders share some concerns – particularly about the economy in general, worker recruitment/retention, and managing the transportation infrastructure in a growing metro area; 16% say “transportation/commuting” is a workforce concern.
Current Concerns About Business as a Whole

- **Economy**: 17%
- **Government/Regulation related**: 17%
- **Operating costs**: 15%
- **Budget/Profit/ROI**: 15%
- **Transportation**: 7%
- **Competition**: 6%
- **Occupancy/Property values**: 5%
- **Funding**: 4%
- **Qualified workforce**: 3%
- **Other**: 6%
- **None**: 5%

Only 7% of Business Leaders consider Transportation to be a problem in Arlington County.

B5. Thinking of your business in general, what is your greatest concern today related to your business as a whole?

Qualitative research participants voiced concern about government cuts and felt the County government could be doing more to attract private companies: specifically, some felt other area county governments were more flexible with leasing terms.
Open-ended question.

Despite general concerns about the shifting workforce (government to private sector) qualitative research participants vocalized their opinions that Arlington County is still creating jobs.

B6. Thinking of your business in general, what is your greatest concern today related to your workforce?

Current Concerns About Workforce

- Finding qualified workforce: 27%
- Transportation/commuting: 16%
- Retaining qualified workforce: 15%
- Providing competitive pay/benefits: 14%
- Housing affordability: 7%
- Other responses: 14%
- No particular concerns: 8%

n = 155
D, C
B8. Looking five years into the future, what is your biggest long-term concern related to your business as a whole?

- **Growth/sustainability of business**: 17%
- **Cost of doing business/living**: 16%
- **Economy**: 12%
- **Workforce concerns**: 9%
- **Real estate/occupancy**: 8%
- **Transportation related**: 7%
- **Government related**: 5%
- **Funding**: 5%
- **Competition**: 3%
- **Other responses**: 11%
- **No particular concerns**: 5%

Only 7% of Business Leaders consider Transportation to be a future concern in Arlington County.
Future Concerns About Workforce

Retaining qualified workforce: 19%
Transportation/commuting: 14%
Finding qualified workforce: 13%
Costs/budget/economy: 13%
Housing affordability: 8%
Providing competitive pay/benefits: 7%
Managing company size: 4%
Maintaining business environment: 3%
Other responses: 5%
No particular concerns: 15%

Traffic concerns include congestion in the metro area, accessibility of transportation and commuting affordability.

89. Looking five years into the future, what is your biggest long-term concern related to your workforce?
Future Transportation Concerns

• “[The biggest concern is for] affordable, accessible and worry-free options for the employees that not only come in super early in the morning but also have to stay at work past midnight.”

• “[The biggest long-term concern about workforce is] about whether employees can continue to afford the cost to commute.”

• “In my opinion, the single factor that prevents the Washington metropolitan area from being rated among the world’s best in terms of quality of life is traffic congestion. Contrary to what many believe, the answer is not more roads and more parking structures. The fix will require a more comprehensive public transportation system that will result in noticeably less cars on the road and better general health due to better air quality.”
Developers who agree that transportation services and improvements be funded by:

- Residential property tax – 25% (8 developers)
- Commercial property tax – 50% (17 developers)

D18. Agree 4 or 5

Transportation has more of a perceived impact on residential development.

! Caution! Small Sample Size

n = 35
D R = Residential
C = Commercial

Ways That a Transportation System Can Affect Development

- Ability to attract tenants, R 43% C 39%
- Ability to retain tenants, R 48% C 39%
- Ability to charge particular rent, R 52% C 56%
- Reputation of the property, R 52% C 44%
- Property operations, R 43% C 28%
- Ability to hire/retain prop. mgt., R 43% C 44%

D11 (Residential) D13 (Commercial). In what ways and to what extent does the quality of the transportation system affect your properties?
Arlington County’s transportation infrastructure and commuting options should continue to be treated as integral to giving the County a competitive edge in supporting development and business. A focus on attracting private sector business is crucial as impacts from declining government employment and occupancy continue.
Business Success Factors
Business leaders give Arlington high marks as a business location for the quality of the transportation system and its accessibility to customers. But leaders also cite the high importance of continued investment in transportation.
Importance of Business Attributes (1/2)

When your organization considered alternative locations for locating your business or part of your business, how important are each of these attributes in the decision process?

- A quality transportation system is the most important consideration when making the decision of where to locate a business.
- Other important considerations include availability of parking, reputation of the area and availability of a skilled workforce.

2012 n = 156
2007 n = 117
B12. When your organization considered alternative locations for locating your business or part of your business, how important are each of these attributes in the decision process?

Qualitative research participants cautioned that a better balance between developers, the County and the community, specifically for assuring an integrated transportation system, is crucial.
B13. What is the single most important attribute in selecting a location to start, relocate or expand your business?

38% of Business Leaders named transportation and accessibility as the most important attribute in selecting a business location.
Arlington County’s Performance of Business Attributes (1/2)

- Reputation of area, 2012: 87%, 2007: 82%
- Proximity to customers, 2012: 76%, 2007: 79%
- Quality of transportation system, 2012: 73%, 2007: 79%
- Attractive residential communities, 2012: 68%, 2007: 69%
- Availability of skilled workforce, 2012: 67%, 2007: 72%
- Recreational opportunities, 2012: 61%, 2007: 60%
- Pro-business climate, 2012: 58%

B3-H. B14-C. Now using this same list, based on your experience with locating your business in Arlington County, please rate Arlington County’s performance in delivering on these attributes, using a scale of 1 to 5.
Arlington County’s Performance of Business Attributes (2/2)

B3-H. B14-C. Now using this same list, based on your experience with locating your business in Arlington County, please rate Arlington County’s performance in delivering on these attributes, using a scale of 1 to 5.
Of the business attributes considered to be most important, Arlington County falls far short in terms of providing adequate parking and has considerable strides to make in offering a pro-business climate and providing a quality transportation system.

Importance
n = 156
C
Performance
n = 177
H, C
This map helps illustrate how drivers of satisfaction and perceived performance on attributes can highlight ACCS strengths and opportunities.

Opportunity Map

GROWTH OPPORTUNITY
Opportunities for improvement

BUILD AND MAINTAIN
Continue to invest and develop to build strength

SAVE RESOURCES
Should not invest resources here

RESERVE STRENGTH
A reserve that can “protect”

n = 191
D, C
Business Attribute Opportunity Map

Performance (Mean = 3.3)

Importance (Mean = 3.4)

- Tax Structure
- Housing
- Training
- K-12
- Colleges/Univs.
- Business Climate
- Business Support
- Residential
- Recreation
- Entertainment
- Skilled Workforce
- Customer Prox.
- Area Reputation
- Transportation
- Parking

Southeastern Institute of Research
## Opportunity Map

<table>
<thead>
<tr>
<th>GROWTH OPPORTUNITY</th>
<th>BUILD AND MAINTAIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Availability of Parking</td>
<td></td>
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<tr>
<td>• Availability of Business Support Services</td>
<td></td>
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<tr>
<td>• Tax Structure and Incentives</td>
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<tr>
<td>• Quality of Transportation System</td>
<td></td>
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<tr>
<td>• Reputation of Area</td>
<td></td>
</tr>
<tr>
<td>• Availability of Skilled Workforce</td>
<td></td>
</tr>
<tr>
<td>• Pro-business Climate</td>
<td></td>
</tr>
<tr>
<td>• Proximity to Customers</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>SAVE RESOURCES</th>
<th>RESERVE STRENGTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Affordable Housing for Employees</td>
<td></td>
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<tr>
<td>• Workforce Training</td>
<td></td>
</tr>
<tr>
<td>• Quality of Education K-12</td>
<td></td>
</tr>
<tr>
<td>• Proximity to Colleges &amp; Universities</td>
<td></td>
</tr>
<tr>
<td>• Attractive Residential Communities</td>
<td></td>
</tr>
<tr>
<td>• Accessibility of Recreational Opportunities</td>
<td></td>
</tr>
<tr>
<td>• Accessibility of Entertainment Opportunities</td>
<td></td>
</tr>
</tbody>
</table>

Attributes by quadrant. Build and maintain are strengths that are important. Reserve strengths tend to be niche attributes, important to small market segments. Save resources are limitations, but as not important to the market.

Growth opportunities are important to Business Leaders but not rated highly: this is where you focus for the greatest ROI.

Importance

Performance

n = 191
D, C
Mean Importance 60%
Mean Performance
While Arlington County currently has a world class transportation infrastructure in place, there is a clear perceived need among business leaders to maintain and constantly improve the systems to meet the growing community needs.

D-C5, C-B16. How important is it for the County to invest in each of the following? Please use a scale of 1 to 5 where “1” is “Not at all Important” and “5” is “Very Important.”

<table>
<thead>
<tr>
<th>Investment Area</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 - Very Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintaining transportation system (D only, n = 35)</td>
<td>29%</td>
<td>69%</td>
<td>98%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improving the transportation system</td>
<td>29%</td>
<td>50%</td>
<td>79%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing and improving the technology infrastructure</td>
<td>38%</td>
<td>35%</td>
<td>73%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attracting more private businesses</td>
<td>34%</td>
<td>37%</td>
<td>71%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Providing more parking</td>
<td>29%</td>
<td>36%</td>
<td>65%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Providing more affordable housing options</td>
<td>21%</td>
<td>30%</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing urban villages</td>
<td>30%</td>
<td>20%</td>
<td>50%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attracting more government jobs</td>
<td>24%</td>
<td>24%</td>
<td>48%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Providing workforce training opportunities</td>
<td>18%</td>
<td>18%</td>
<td>36%</td>
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</tbody>
</table>
Implication

Arlington County currently has a positive reputation among business leaders as a place to live, work and conduct business, and transportation contributes to the positive view. Focus on continual improvements to the transportation system is crucial to maintaining the County’s metro area and national advantage. Purposeful development that aligns with the public transportation system is essential.
Transportation Satisfaction and Concerns
Even before its expected growth, Arlington County is considered to have challenges, including parking and traffic congestion, for SOV drivers. Regional transportation system integration shows some shortcomings.
Overall satisfaction (ratings of 4 + 5) with both the regional and Arlington County transportation systems is down slightly from 2007, with those indicating they are “Very Satisfied” down significantly.

Focus group participants felt that, in general, Arlington’s transportation system sets it apart, but may not be available to all county workers.

While overall satisfaction with the regional and county transportation system has remained steady, fewer business leaders consider their satisfaction level to be the highest than in 2007.

D1-D, C1-H, C. Overall, how satisfied are you with the regional transportation system?
D2-D, C2-H, C. And how satisfied are you with the transportation system in Arlington County?
The majority of developers and business leaders alike consider Arlington County to have access to multiple transportation options.

Overall, how would you rate Arlington County on each of the following?

- Access to transportation options (D only, n = 35): 49% 4, 26% 5
- Reliability of travel options (D only, n = 35): 54% 4, 17% 5
- Availability of multiple different transportation options: 42% 4, 20% 5
- Availability of taxis: 41% 4, 17% 5
- Quality of transportation options (D only, n = 35): 46% 4, 9% 5
- Ease of getting around without a car: 33% 4, 16% 5
- Regional coordination of the transportation system: 26% 4, 10% 5
- Ease of getting around in a car: 22% 4, 7% 5
- Availability of parking: 20% 4, 7% 5

n = 212
H, D, C

D3-D, C3-H, C.
Arlington County Transportation Areas for Improvement

The biggest transportation concerns among business leaders:

Lack of available parking 34% rating as “Poor” (1 or 2).

Difficulty in getting around in a car 37% rating as “Poor” (1 or 2).

Regional coordination of the transportation system, while not rated poorly, received a mediocre rating, with 45% rating it as a 3.

Availability of parking

- Ease of getting around in a car 37%
  - Neg.: 12%, 25%
  - Pos.: 22%, 7%

- Availability of parking 34%
  - Neg.: 9%, 25%
  - Pos.: 20%, 7%

- Regional coordination of the transportation system 17%
  - Neg.: 4%, 13%
  - Pos.: 27%, 10%

- Ease of getting around without a car 14%
  - Neg.: 4%, 10%
  - Pos.: 33%, 16%

Overall, how would you rate Arlington County on each of the following?

n = 212
H, D, C

D3-D. C3-H, C.
C4. What concerns, if any, do you have regarding Arlington County’s transportation system?

Traffic congestion and parking are significant concerns. Business leaders also cite metro and bus issues, including regional coordination and connectivity.

Note: See Appendix for full listing of open-ended questions.
C5. What improvements should the County make in terms of the transportation system?

Suggested Improvements to Arlington County Transportation System

- Metro related: 14%
- Bike related: 11%
- Parking related: 11%
- Connect regional modes: 9%
- Bus concerns: 8%
- More public transit: 8%
- Information technology: 6%
- I-66 congestion: 5%
- Other responses: 32%
- No particular concerns: 15%

Note: See Appendix for full listing of open-ended questions.

Suggested improvements from qualitative research participants include aligning development with the metro system, expanding the network of bike paths and keeping transportation costs to a minimum. Efficient N/S routes are specifically needed.

n = 114 H, C
Transportation System’s Positive Effects on Businesses (1/2)

In general, business leaders considered the transportation system to have greater impacts on businesses in 2007 than in the most recent survey.

Qualitative research participants report that businesses elect to locate in Arlington County because of the transportation system and the difficulty of mobility in the district.

C7. In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization’s ability to conduct business?
In general, business leaders considered the transportation system to have greater impacts on businesses in 2007 than in the most recent survey.

Qualitative research participants report that businesses elect to locate in Arlington County because of the transportation system and the difficulty of mobility in the district.

C7. In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization’s ability to conduct business?
C7. In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization’s ability to conduct business?

- 6 of 8 hotels indicated that transportation affects their ability to attract guests.
- 4 of 8 hotels indicated that transportation affects the room rates they are able to charge.
- All hotels offer some sort of transportation assistance to their guests.

<table>
<thead>
<tr>
<th>Negative Effects</th>
<th>Positive Effects</th>
<th>2012 n = 177</th>
<th>2012 n = 177</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to recruit employees</td>
<td>Ability to retain employees</td>
<td>6%</td>
<td>34%</td>
</tr>
<tr>
<td>Customers' ability to reach business</td>
<td>Customers' ability to deliver services</td>
<td>11%</td>
<td>31%</td>
</tr>
<tr>
<td>Access to broad workforce</td>
<td>Access to broad workforce</td>
<td>7%</td>
<td>37%</td>
</tr>
<tr>
<td>Ability to retain employees</td>
<td>Ability to retain employees</td>
<td>7%</td>
<td>37%</td>
</tr>
<tr>
<td>Employee morale</td>
<td>Employee morale</td>
<td>13%</td>
<td>34%</td>
</tr>
<tr>
<td>Employee productivity</td>
<td>Employee productivity</td>
<td>12%</td>
<td>34%</td>
</tr>
<tr>
<td>Employee attendance</td>
<td>Employee attendance</td>
<td>10%</td>
<td>33%</td>
</tr>
<tr>
<td>Employee health</td>
<td>Employee health</td>
<td>8%</td>
<td>37%</td>
</tr>
<tr>
<td>Cost to deliver services/products</td>
<td>Cost to deliver services/products</td>
<td>11%</td>
<td>34%</td>
</tr>
<tr>
<td>Cost to obtain supplies</td>
<td>Cost to obtain supplies</td>
<td>11%</td>
<td>30%</td>
</tr>
<tr>
<td>Emergency preparedness</td>
<td>Emergency preparedness</td>
<td>16%</td>
<td>28%</td>
</tr>
</tbody>
</table>

H, C
Transportation System’s 2012 Effect on:

- Ability to recruit employees
- Ability to retain employees
- Access to broad workforce
- Customer’s ability to reach business
- Employee attendance
- Employee health
- Employee morale
- Employee productivity
- Cost to deliver services/products
- Cost to obtain supplies
- Emergency preparedness

C7. In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization’s ability to conduct business?

6 of 8 hotels indicated that transportation affects their ability to attract guests.

4 of 8 hotels indicated that transportation affects the room rates they are able to charge.

All hotels offer some sort of transportation assistance to their guests.

2012 n = 177

H, C
In general, business leaders considered the transportation system to have greater impacts on businesses in 2007 than in the most recent survey.

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Qualitative research participants report that businesses elect to locate in Arlington County because of the transportation system and the difficulty of mobility in the district.

C7. In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization’s ability to conduct business?
Implication

While there may not be a solution, it is important to acknowledge the challenges that traffic congestion presents. Parking solutions should be a constant consideration, and continuing efforts to manage a seamless regional system will allow commuters to more easily accomplish non-SOV travel.
Few business leaders are currently aware of Arlington County’s goal to manage rush hour traffic. While some question how realistic the goal actually is and are unsure how hard the County is working to achieve the goal, they do nonetheless acknowledge its importance.
87% of Business Leaders Are Unaware of Arlington County’s Rush Hour Traffic Goals

D15 – D. C9-H, C. Arlington County would like to keep rush hour traffic at no more than 5 percent above 2005 levels for the next 20 years, even though population and employment in the County will grow. Prior to this survey, were you aware of this goal?

- No 87%
- Yes 11%
- Not sure 2%

n = 209
H, D, C

Similarly, qualitative research participants were largely unaware of Arlington’s goal.

Nonetheless, they agreed that the rush hour traffic goal is important and noted that in order for it to be achieved, the County must be more flexible in terms of acquiring and locating businesses adjacent to existing sustainable transportation options.
A minority, 11% of business leaders, indicated knowledge of Arlington County’s rush hour traffic goal. The majority consider it to be important and in the best interest of the County, although relatively few consider the County to be working diligently to achieve it.

To what extent do you agree with each of the following statements? Please use a scale of 1 to 5 where “1” means “strongly disagree” and “5” means “strongly agree.”

- It is important to achieve this goal
- The goal is in the best interest of the business community
- The County needs to do more to achieve this goal
- This goal is realistic
- The County is working hard toward achieving this goal

n = 209
H, D, C

D16 –D. C10-H, C. To what extent do you agree with each of the following statements? Please use a scale of 1 to 5 where “1” means “strongly disagree” and “5” means “strongly agree.”
Business Leaders’ Attitudes About Rush Hour Traffic Goals

One-third of business leaders feel that Arlington County’s traffic goal is unrealistic.

D16 – D. C10-H, C. To what extent do you agree with each of the following statements? Please use a scale of 1 to 5 where “1” means “strongly disagree” and “5” means “strongly agree.”

- It is important to achieve this goal
  - % Disagree: 4%
  - % Agree: 33%

- The goal is in the best interest of the business community
  - % Disagree: 3%
  - % Agree: 33%

- The County needs to do more to achieve this goal
  - % Disagree: 4%
  - % Agree: 31%

- This goal is realistic
  - % Disagree: 12%
  - % Agree: 18%

- The County is working hard toward achieving this goal
  - % Disagree: 4%
  - % Agree: 19%

n = 209
H, D, C
After being told of Arlington County's 20 year growth predictions, the percent of business leaders considering the Arlington County goal to be important jumped from 61% to 76%, with "very important" jumping from 28% to 44%.

Focus group participants noted that public transportation options need to increase with increases in population and business. Specifically, they questioned the opportunity to expand the metro system, as the orange line is reportedly currently overcrowded. Focus should be kept on those travelling through, as well as within, the County.

D17-D. C11-H, C. According to some predictions, over the next 20 years, the population of Arlington County is expected to grow by approximately 20%, and the number of individuals employed by businesses in the County is expected to grow by 30%. If those predictions are accurate, how important is the County’s goal to keep rush hour traffic at no more than 5% above 2005 levels? Please use a scale where “1” means “not at all important” and “5” means “very important.”
Allocation of Transportation Infrastructure Funding for Arlington County

Average amount allocated out of $100 total.

Total sample average in ( ).

! Caution! Small Sample Sizes HR and Developers.

n = 212
H, D, C
H = 21
D = 35
C = 156

D6-D. C6-C, H. If you had $100 to allocate across the following parts of Arlington County’s transportation system, how would you do it?
Implication

As few business leaders are aware of the County’s current traffic goal and many are not of the mindset that the County is working hard to achieve what is considered to be an important goal, proactive communication about the goal and steps taken to achieve it is paramount.
Employee Transportation and Parking Logistics
Despite general concerns about parking availability in the County, business leaders and HR personnel consider employee parking to be adequate, with multiple parking options. But a sizeable share of employers do offer free parking or parking subsidies.
**Employee Transportation Issues**

<table>
<thead>
<tr>
<th>Issue</th>
<th>Not a Problem</th>
<th>A Problem</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of transportation options in general</td>
<td>33% 26%</td>
<td>10% 6%</td>
</tr>
<tr>
<td>Availability of parking</td>
<td>40% 18%</td>
<td>13% 9%</td>
</tr>
<tr>
<td>Availability of transportation during the specific times that they need to get to work</td>
<td>30% 26%</td>
<td>14% 12%</td>
</tr>
<tr>
<td>Affordability of transportation options</td>
<td>18% 18%</td>
<td>19% 9%</td>
</tr>
</tbody>
</table>

D8HR. To what extent is each of the following a problem for your employees when it comes to getting to and from work? Please use a scale of 1 to 5 where “1” means “not at all a problem” and “5” means “a big problem.”

n = 99

H, C

(C familiar with transportation issues)

(QD-1 = 4, 5)

Qualitative research participants vocalized that parking is a particular issue for businesses that find it necessary to travel within the County to meetings with clients.
D1. How familiar are you with the specific transportation information services or benefit programs that are available to employees at your worksite to help with their travel to work? Please use a scale of 1 to 5 where “1” means “not at all familiar” and “5” means “very familiar.”
The majority of business leaders familiar with their employees’ transportation concerns indicate that mass transit is readily assessable to the workplace.

Qualitative research participants considered access to public transportation to be a key driver for residents’ decisions to reside in Arlington County.

**Distance to Bus Stops and Train Stations**

- **1 - 2 blocks**: 79%
- **3 - 5 blocks (1/4 mile - 1/2 mile)**: 10%
- **6 - 10 blocks (1/2 mile - 1 mile)**: 5%
- **More than 10 blocks or more than one mile**: 0%
- **Other**: 5%
- **Don't know**: 1%

**n = 99**

H, C  
(C familiar with transportation issues)  
(QD-1 = 4, 5)

D1HR. How far from your worksite/store or establishment/property is the nearest bus stop or train station? If you have multiple worksites, please think of the one with the most employees.
Distance to Bus Stops and Train Stations

G8. How far from your [worksite; store or establishment; property] is the nearest bus stop or train station? If you have multiple worksites, please think of the one with the most employees.

- 1 - 2 blocks: 80%
- 3 - 5 blocks (1/4 mile - 1/2 mile): 16%
- 6 - 10 blocks (1/2 mile - 1 mile): 3%
- More than 10 blocks (more than one mile): 0%
- Other: 1%

n = 114

Note: This slide or the previous should be deleted. From a glitch in the skip, this question was asked twice.
Employee Parking

- On-site company-owned lot or garage: 51%
- Public lot or garage: 46%
- On the street: 11%
- Other: 9%
- Off-site company-owned lot or garage: 3%

81% of respondents indicated that parking is adequate to meet employees’ needs.

D2HR. Where do employees who drive to your worksite/store or establishment/property park? If you have multiple worksites, please think of the one with the most employees. Please check all that apply.

n = 99
H, C
(C familiar with transportation issues) (QD-1 = 4, 5)
D4HR. Do employees pay a fee to park in any of these locations? Please check all that apply.

- Fee for public lot or garage: 35%
- No fee, all parking is free: 34%
- Fee for on-site company owned parking: 22%
- Fee for street parking: 17%
- Fee for other parking: 11%
- Fee for off-site company owned parking: 5%
- Don't know: 1%

One-third of businesses fully subsidize their employee parking.
Almost two-thirds of businesses subsidize their employee parking, either in full or in part.

! Caution! Small Sample Size

n = 64
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)

DSHR. Does your organization pay part or all of the parking cost for employees?

Employer-paid Parking

- Employees pay entire cost: 38%
- Organization pays all of the cost: 38%
- Organization pays part of the cost: 25%

n = 64
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)
Employer Subsidized Parking

- Pays for all employees: 70%
- Pays for some employees: 30%

n = 40
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)

Employers pay an average of $119 in monthly parking fees (range of $50 - $240)
(27 responses)

! Caution !
Small Sample Size

D6SomeHR. Please indicate if your organization pays all or part of the parking cost for all employees or some employees.
Employees pay an average of $60 in monthly parking fees (range of $45 - $83)
(11 responses)

! Caution!
Small Sample Size

n = 40
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)

D7MonthHR. In addition to the amount that you pay, do your employees also pay?

Employee-paid Parking

Yes 42%
No 52%
Don’t know 5%
Implication

The results suggest that employers are not overly concerned about employee parking, and the vast majority of employers’ locations are close to transit. This presents an opportunity to encourage employers to limit parking subsidies, except for carpools and vanpools, instead supporting transit options.
Transportation Programs and Services
As self-reported by employers, transportation services and benefits are widely available to workers in Arlington County. Still, considerable opportunities exist to increase the offer and usage of such services and thus positively impact the use of sustainable travel.
Transportation Programs and Benefits Currently Offered (1/2)

D9HR. Following is a list of transportation information services or benefit programs that your organization or another organization might make available to employees at your worksite to help with their travel to work by modes other than driving. In the first column, 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.
D9HR. Following is a list of transportation information services or benefit programs that your organization or another organization might make available to employees at your worksite to help with their travel to work by modes other than driving. In the first column, 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.

**Transportation Programs and Benefits Currently Offered (2/2)**

<table>
<thead>
<tr>
<th>Service</th>
<th>2012</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-tax transportation acct</td>
<td>38%</td>
<td>20%</td>
</tr>
<tr>
<td>Compressed work week</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>Guaranteed Ride Home</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td>Car/Vanpool reserved parking</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Car/Vanpool financial benefit</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Ridematching</td>
<td>15%</td>
<td>12%</td>
</tr>
</tbody>
</table>

2012 n = 95
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)
2007 n = 117
Following is a list of transportation information services or benefit programs that your organization or another organization might make available to employees at your worksite to help with their travel to work by modes other than driving. In the first column, 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.
Transportation Programs and Benefits Currently Offered and Considered (1/2)

Numerous employers are already providing their employees with multiple transportation programs and benefits (employer average of 6.4 benefits offered).

2012 n = 95
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)
2007 n = 117

D9HR. Following is a list of transportation information services or benefit programs that your organization or another organization might make available to employees at your worksite to help with their travel to work by modes other than driving. In the first column, 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.
Considerable opportunities exist to promote the guaranteed ride home program as well as ridematching assistance.

D9HR. Following is a list of transportation information services or benefit programs that your organization or another organization might make available to employees at your worksite to help with their travel to work by modes other than driving. In the first column, 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.

<table>
<thead>
<tr>
<th>Service</th>
<th>Currently available</th>
<th>Would consider</th>
<th>% Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Showers</td>
<td>62%</td>
<td>7%</td>
<td>69%</td>
</tr>
<tr>
<td>Pre-tax transportation account</td>
<td>38%</td>
<td>23%</td>
<td>61%</td>
</tr>
<tr>
<td>Guaranteed ride home</td>
<td>22%</td>
<td>37%</td>
<td>59%</td>
</tr>
<tr>
<td>Compressed work week</td>
<td>33%</td>
<td>19%</td>
<td>52%</td>
</tr>
<tr>
<td>Ridematching</td>
<td>15%</td>
<td>35%</td>
<td>50%</td>
</tr>
<tr>
<td>Preferential carpool parking</td>
<td>20%</td>
<td>26%</td>
<td>46%</td>
</tr>
<tr>
<td>Financial benefits for carpoolers</td>
<td>20%</td>
<td>22%</td>
<td>42%</td>
</tr>
</tbody>
</table>

2012 n = 95
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)
2007 n = 117
Considerable opportunities exist to promote the guaranteed ride home program as well as ridematching assistance.

D9HR. Following is a list of transportation information services or benefit programs that your organization or another organization might make available to employees at your worksite to help with their travel to work by modes other than driving. In the first column, 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.
In general, employers feel that their employees are very receptive to adopting smart commuting practices.

D13HR. How interested have employees been in these services? For each service, indicate employees’ level of interest, using a scale of 1 to 5 where “1” means employees have been “not at all interested” and “5” means they have been “very interested.”

- **Flexible work schedules (62)**
  - 23% Very interested
  - 68% Interested
  - Total: 91%

- **SmarTrip cards (55)**
  - 24% Very interested
  - 64% Interested
  - Total: 88%

- **Teleworking (58)**
  - 22% Very interested
  - 64% Interested
  - Total: 86%

- **Compressed workweek (30)**
  - 23% Very interested
  - 60% Interested
  - Total: 83%

- **Metrochek, SmartBenefits, etc. (61)**
  - 20% Very interested
  - 61% Interested
  - Total: 81%

- **Pre-tax transportation account (36)**
  - 19% Very interested
  - 56% Interested
  - Total: 75%

- **Showers available on-site (59)**
  - 24% Very interested
  - 44% Interested
  - Total: 68%

*Caution!* Small sample sizes. Actual ‘n’ shown in ( ).

In general, employers feel that their employees are very receptive to adopting smart commuting practices.
### Interest in Services and Benefit Programs

<table>
<thead>
<tr>
<th>Service</th>
<th>1 (Not at all interested)</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 - Very interested</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car/Vanpool financial benefit (19)</td>
<td>16%</td>
<td>42%</td>
<td>58%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bike lockers/racks (61)</td>
<td>18%</td>
<td>36%</td>
<td>54%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car/Vanpool reserved parking (18)</td>
<td>22%</td>
<td>22%</td>
<td>44%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guaranteed Ride Home (21)</td>
<td>29%</td>
<td>10%</td>
<td>39%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transit schedules (53)</td>
<td>15%</td>
<td>21%</td>
<td>36%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation options info (59)</td>
<td>12%</td>
<td>20%</td>
<td>32%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ridematching assistance (14)</td>
<td>7%</td>
<td>14%</td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

D13HR. How interested have employees been in these services? For each service, indicate employees’ level of interest, using a scale of 1 to 5 where “1” means employees have been “not at all interested” and “5” means they have been “very interested.”

In general, employers feel that their employees are very receptive to adopting smart commuting practices.

! Caution! Small sample sizes.
Actual ‘n’ shown in ( ).
As employers feel that employees desire transportation services, they consider those services to positively impact employee quality, morale and productivity.

! Caution! Small sample size.

D14HR. Listed below are some benefits employers might receive from offering transportation services to employees. For each, indicate how much your organization has benefited from offering transportation services. Please use a scale of 1 to 5 where “1” means your organization has received “no benefit” in this area from offering services and “5” means your organization has received a “great benefit” in this area.

- Enhanced employee morale: 28% (4), 24% (5), 52% total
- Enhanced employee recruitment: 25% (4), 21% (5), 46% total
- Attract more qualified employees: 25% (4), 20% (5), 45% total
- Employee retention, reduced turnover: 25% (4), 20% (5), 45% total
- Increased productivity: 25% (4), 17% (5), 42% total
- Reduced parking need, parking-related costs: 14% (4), 22% (5), 36% total

2012 n = 87
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)
Employer Benefits of Transportation Services

<table>
<thead>
<tr>
<th>Benefit</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced community recognition or reputation</td>
<td>18%</td>
<td>15%</td>
<td>33%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reduced traffic congestion around worksite</td>
<td>12%</td>
<td>18%</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reduced absenteeism</td>
<td>15%</td>
<td>14%</td>
<td>29%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reduced operating costs</td>
<td>12%</td>
<td>13%</td>
<td>25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reduced need for office space</td>
<td>12%</td>
<td>13%</td>
<td>25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fulfilled obligation that came with building</td>
<td>9%</td>
<td>15%</td>
<td>24%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

D14HR. Listed below are some benefits employers might receive from offering transportation services to employees. For each, indicate how much your organization has benefited from offering transportation services. Please use a scale of 1 to 5 where “1” means your organization has received “no benefit” in this area from offering services and “5” means your organization has received a “great benefit” in this area.

<table>
<thead>
<tr>
<th>2012 n = 87</th>
<th>H, C</th>
</tr>
</thead>
</table>
| (C familiar with transportation issues) | (QD-1 = 4, 5) 

Caution! Small sample size.
There has been a marked increase in employers considering transportation benefits to positively impact an increase in employee retention.

Note:
2012 results reported as responses 4 and 5 on a 5 point scale, with 5 being “a great benefit.”
2007 results reported as selection that company has received stated benefit.

2012 n = 177
H, C
2007 n = 96

D14HR. Listed below are some benefits employers might receive from offering transportation services to employees. For each, indicate how much your organization has benefited from offering transportation services. Please use a scale of 1 to 5 where “1” means your organization has received “no benefit” in this area from offering services and “5” means your organization has received a “great benefit” in this area.
Program Implementation Assistance

Don’t know
18%

No
41%

Yes
40%

Considering the abundance of transportation services and benefits offered by employers, relatively few relied on assistance when implementing employee programs.

! Caution! Small sample size.

2012 n = 87
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)

D15HR. When you were planning or implementing these services, did you receive any information or assistance from any organization or other resource that helped you implement them?
Program Implementation Assistance

Number receiving assistance = 35
Because total n = 99, number of mentions = percentages shown in chart.

i.e., 25 of 35 employers receiving assistance report receiving assistance from ATP.

2012 n = 99
H, C
(C familiar with transportation issues)
(QD-1 = 4, 5)

D16HR. What organization or resource provided the assistance? Please check all that apply.

- Arlington Transportation Partners: 25%
- Metro, WMATA: 23%
- Commuter Connections, MWCOG: 13%
- Arlington County Commuter Services: 11%
- Arlington Economic Development: 5%
- Telework!VA: 2%
- Other organization: 2%
- Website: 2%
- Virginia Railway Express: 1%

Those relying on assistance for transportation implementation rely on an average of 2.4 organizations or resources.

Southeastern Institute of Research
Likelihood of Service Implementation If Assistance Not Available (1/2)

Employers were most likely to say they would have implemented telework and work schedule services w/o assistance. Assistance was most needed for travel-related services and moderately needed for subsidy programs.

D18HR. For each of the following, if this assistance had not been available to you, how likely would you have been to implement these services? Please use a scale of 1 to 5 where “1” means “not at all likely” and “5” means “very likely.”

- Compressed work week (27)
  - 4% 5% 67% 65% 71%
- Flexible work schedules (57)
  - 5% 5% 65% 62% 70%
- Teleworking (53)
  - 6% 6% 62% 62% 68%
- SmarTrip cards (50)
  - 12% 12% 50% 50% 62%
- Car/Vanpool reserved parking (16)
  - 12% 12% 50% 50% 62%
- Showers available on-site (55)
  - 7% 7% 51% 51% 58%
- Pre-tax transportation acct (33)
  - 12% 12% 45% 45% 57%

! Caution! Small sample sizes. Actual ‘n’ shown in ( ).

2012 n = 95 H, C (C familiar with transportation issues) (QD-1 = 4, 5)
Employers were most likely to say they would have implemented telework and work schedule services w/o assistance. Assistance was most needed for travel-related services and moderately needed for subsidy programs.

! Caution! Small sample sizes. Actual ‘n’ shown in ( ).

2012 n = 95 H, C (C familiar with transportation issues) (QD-1 = 4, 5)

Likelihood of Service Implementation If Assistance Not Available (2/2)

<table>
<thead>
<tr>
<th>Service</th>
<th>Very Likely (5)</th>
<th>Likely (4)</th>
<th>Not Likely</th>
<th>Not at all Likely</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guaranteed Ride Home (21)</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Transportation options info (55)</td>
<td>18%</td>
<td>24%</td>
<td>32%</td>
<td>36%</td>
<td>55%</td>
</tr>
<tr>
<td>Transit schedules (49)</td>
<td>12%</td>
<td>37%</td>
<td>37%</td>
<td>8%</td>
<td>49%</td>
</tr>
<tr>
<td>Bike lockers/racks (57)</td>
<td>18%</td>
<td>35%</td>
<td>35%</td>
<td>12%</td>
<td>53%</td>
</tr>
<tr>
<td>Car/Vanpool financial benefit (17)</td>
<td>6%</td>
<td>47%</td>
<td>43%</td>
<td>4%</td>
<td>53%</td>
</tr>
<tr>
<td>Metrochek, SmartBenefits, etc. (56)</td>
<td>12%</td>
<td>45%</td>
<td>37%</td>
<td>6%</td>
<td>57%</td>
</tr>
</tbody>
</table>

D18HR. For each of the following, if this assistance had not been available to you, how likely would you have been to implement these services? Please use a scale of 1 to 5 where “1” means “not at all likely” and “5” means “very likely.”
Implication

Despite already widespread transportation benefit offerings from employers, potential exists for growth in some services – particularly in services for which employers have been less likely to receive implementation assistance. This suggests employers might be receptive to ATP assistance if targeted to these new services.
Arlington Transportation Partners
While there has been a shift from awareness to use of Arlington Transportation Partners since 2007, opportunities still exist for partnerships with the organization and use of its programs and services.
E1. For each of the following organizations, please indicate if you personally have worked with them, if someone else from your company has worked with them, or if neither you nor your company has worked with them. Please select all that apply.

**TDM Enforcement Office**
- Familiar with: 50% of 35, 16
- Satisfied with: 65% of 16, 11

**ATP**
- Familiar with: 53% of 35, 18
- Satisfied with: 72% of 18, 13

**E2**
- Familiar = 4 or 5

**E3**
- Satisfied = 4 or 5

**Caution!** Small Sample Size
E1HR. Do you know which county organization provides transportation services to Arlington County residents, employees and visitors?

Of the 9 HR professionals indicating awareness of the organization that provides transportation services to Arlington County:

- 1 named Arlington Transit
- 3 named ART
- 4 named ATP
- 1 named mobile commuter connections

! Caution! Small sample size.

2007 n = 89

2012 n = 21

2007 Yes: 40%

2012 Yes: 43%

2012 Correct Response: 19%
Relationship with ATP

E2HR. Arlington Transportation Partners (ATP) is a county government organization that offers free transportation information and services to employers and residential communities in Arlington County. ATP assists employers and property managers in offering transportation benefit programs that will help their employees and residents get around the Washington region. What is your relationship with ATP?

- **Currently use, 2012**
  - 2012: 26%
  - 2007: 10%

- **Have used in past, 2012**
  - 2012: 16%
  - 2007: 4%

- **Aware but never used, 2012**
  - 2012: 21%
  - 2007: 33%

- **Not aware, 2012**
  - 2012: 21%
  - 2007: 37%

- **Don't know, 2012**
  - 2012: 16%
  - 2007: 13%

Note: “Other” option in 2007 is not shown.

10 of 11 say ATP’s services have been useful. QE5H = 4, 5

9 of 11 HR professionals who indicated a company relationship with ATP expressed satisfaction with their relationship. QE3H = 4, 5

! Caution! Small sample size for 2012.
Interest in Specific ATP Services

E10HR. Some of the specific services that ATP offers are Employee Transportation Survey... , Transportation Brochures... , Transit Benefit... , Employer Seminars and Workshops... , Parking Management... , Ongoing Support for You... Keeping those services in mind, how interested would you be in using ATP services? Please use a scale of 1 to 5 where “1” means “not at all interested” and “5” means “very interested.”

Top 2
14%

Bottom 3
86%

n = 21
H
‘Top 2’ refers to answers of 4 and 5 while ‘Bottom 3’ refers to answers 1, 2 and 3.

! Caution! Small sample size.

Despite user satisfaction, only three of 21 HR managers expressed interest in specific ATP services in the future.
Implication

Clear communication about Arlington Transportation Partners and the services it offers in support of employer efforts will serve to reduce SOV travel, ultimately increasing employee satisfaction and well-being.
Restaurant and Retail Customer Parking

Note: Due to extremely small sample size, results for this section are directional only.

Caution! Small sample size for this section.
Overall ease of getting to retail and restaurant locations:
(# mentions)

1. Very Difficult (0)
2. 2 – (2)
3. 3 – (7)
4. 4 – (7)
2. Very Easy (0)

! Caution! Small sample size.

n = 16
C. Only
Restaurant/Retail

E2. Please think about how your customers get to your location. Please estimate the percentage of your customer base that uses each of the following modes.
E4. How does transportation access affect your customers? Please use a scale of 1 to 5 where “1” means “very negatively” and “5” means “very positively.”

- Ability to attract customers to location: 1 negative, 5 positive
- Length of time spent in business: 1 negative, 4 positive
- Ease of getting products and services: 1 negative, 5 positive
- When customers are able to visit: 1 negative, 4 positive
- Ability for customers to "shop local": 1 negative, 5 positive

Note: Small sample size.
E5. Is parking available for customers at your location? Please select all that apply.

E6. Do you consider the amount of parking available in your location to be adequate?

Qualitative research participants expressed dissatisfaction in the availability of bus parking for tours and other groups.

Four of 16 restaurant/retail respondents indicated there is adequate parking at their place of business. E6 = 4 or 5

! Caution! Small sample size.

n = 16
C, Only Restaurant/Retail

All restaurant and retail business leaders surveyed indicated there is currently parking available for their customers.
E7. How does your parking situation affect your customers? Please use a scale of 1 to 5 where “1” means “very negatively” and “5” means “very positively.”

- **Ability to attract customers to location**
  - Negatively: 2
  - Neutral/DK: 4
  - Positively: 10

- **Length of time customers spend in business**
  - Negatively: 2
  - Neutral/DK: 6
  - Positively: 8

- **Ease of getting products and services to customers**
  - Negatively: 2
  - Neutral/DK: 5
  - Positively: 9

- **When customers are able to visit**
  - Negatively: 3
  - Neutral/DK: 3
  - Positively: 10

**Caution!** Small sample size.

n = 16
C, Only Restaurant/Retail
Recap of Key Insights and Recommendations
Summary

• Business leaders are more likely than are other Arlington workers to live in Arlington County. But a higher share of business leaders (62%) drive alone to work, compared with the drive alone rate of all Arlington workers (55%).

  – There may be a “PR story” in the fact that AC business leaders’ commute mode split mirrors the entire County. Business leaders are leading the way. They can help the County move towards 40/60.

  – It is critical that AC continue to educate business leaders about the benefits of non-SOV travel; as they gain more information, they will be more likely, if not to change their own travel habits, to provide information to employees, impacting a positive trend towards sustainable travel.
Summary

- Even though most business leaders reside outside of the County, they have a positive perception of Arlington County, both as a place to live and as a place to conduct business. A large share also rate QOL higher than for other parts of the Washington metro area.

- Business leaders share some concerns – particularly about the economy in general, worker recruitment/retention, and managing the transportation infrastructure in a growing metro area; 16% say “transportation/commuting” is a workforce concern.

  - Arlington County’s transportation infrastructure and commuting options should continue to be treated as integral to giving the County a competitive edge in supporting development and business. A focus on attracting private sector business is crucial as impacts from declining government employment and occupancy continue.
Summary

- Business leaders give Arlington high marks as a business location for the quality of the transportation system and its accessibility to customers.

- But leaders also cite the high importance of continued investment in transportation.
  - Arlington County currently has a positive reputation among business leaders as a place to live, work and conduct business, and transportation contributes to the positive view.
  - Focus on continual improvements to the transportation system is crucial to maintaining the County’s metro area and national advantage. Purposeful development that aligns with the public transportation system is essential.
Summary

• Even before its expected growth, Arlington County is considered to have challenges, including parking and traffic congestion, for SOV drivers. Regional transportation system integration shows some shortcomings.
  – While there may not be a solution, it is important to acknowledge the challenges that traffic congestion presents. Parking solutions should be a constant consideration, and continuing efforts to manage a seamless regional system will allow commuters to more easily accomplish non-SOV travel.

• Few business leaders are currently aware of Arlington County’s goal to manage rush hour traffic. While some question how realistic the goal actually is and are unsure how hard the County is working to achieve the goal, they do nonetheless acknowledge its importance.
  – As few business leaders are aware of the County’s current traffic goal and many are not of the mindset that the County is working hard to achieve what is considered to be an important goal, proactive communication about the goal and steps taken to achieve it is paramount.
Summary

• Despite general concerns about parking availability in the County, business leaders and HR personnel consider employee parking to be adequate, with multiple parking options. But a sizeable share of employers do offer free parking or parking subsidies.
  – The results suggest that employers are not overly concerned about employee parking, and the vast majority of employers’ locations are close to transit. This presents an opportunity to encourage employers to limit parking subsidies, except for carpools and vanpools, instead supporting transit options.

• As self-reported by employers, transportation services and benefits are widely available to workers in Arlington County. Still, considerable opportunities exist to increase the offer and usage of such services and thus positively impact the use of sustainable travel.
  – Despite already widespread transportation benefit offerings from employers, potential exists for growth in some services – particularly in services for which employers have been less likely to receive implementation assistance. This suggests employers might be receptive to ATP assistance if targeted to these new services.
Summary

• While there has been a shift from awareness to use of Arlington Travel Partners since 2007, opportunities still exist for partnerships with the organization and use of its programs and services.
  – Clear communication about Arlington Transportation Partners and the services it offers in support of employer efforts will serve to reduce SOV travel, ultimately increasing employee satisfaction and well-being.
Panel Interest
39% of Respondents (n = 75) Indicated Interest in Participating in a Research Panel

n = 193
H, D, C
For Additional Information on This Study Contact:

John Judy or Rachel Tallis
Southeastern Institute of Research
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