<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background, Objectives &amp; Methodology</td>
<td>01</td>
</tr>
<tr>
<td>User Demographic Profile</td>
<td>02</td>
</tr>
<tr>
<td>Travel Behavior</td>
<td>03</td>
</tr>
<tr>
<td>Travel Demand Management</td>
<td>04</td>
</tr>
<tr>
<td>CommuterDirect.com Experience</td>
<td>05</td>
</tr>
<tr>
<td>Impact: Behavioral Change</td>
<td>06</td>
</tr>
<tr>
<td>Conclusion</td>
<td>07</td>
</tr>
</tbody>
</table>
2018 Key Takeaways

OVERVIEW OF DEMOGRAPHICS

- The majority of current (active) and lapsed (inactive) customers surveyed in this study are employed full-time.
- The majority of current customers surveyed in this study are Boomers and GenXers.
- The majority of lapsed customers surveyed in this study are GenXers and Millennials (followed by Boomers).
- Most current and lapsed respondents are White (non-Hispanic) followed by African-Americans or Black.
- The largest share of active respondents (42%) had a high annual household income (>120K).
- This study includes slightly more female respondents than male for both current and lapsed customers.
- Most current customers take the commuter train primarily followed by the bus. In contrast, “drive alone” took the highest share of primary modes for lapsed riders.
- The largest share (45%) of lapsed users live very close to work (10 miles or less).
2018 Key Takeaways

MAIN TAKEAWAYS

− Active and inactive customers surveyed in this study are most likely to purchase fares for MARC, followed by the MTA commuter bus and then Metrorail.

− Around 23% of current CD users purchase VRE. This is compared to 7% for lapsed riders.

− There is a difference between active and inactive purchases of passes. Active customers purchase MARC Monthly Passes and SmartTrip cards mostly. Inactive customers mostly purchase SmartTrip cards.

− Current CommuterDirect.com® (CD) customers are highly dependent on CD with it being the sole point of purchase for 61% of respondents. Inactive customers mostly purchased from WMATA.com.

− There is a high satisfaction with and loyalty for CD by active customers. More than half of current customers who responded to the survey already recommended it to others. Inactive customers are also very satisfied.

− Individual website and fulfillment services are also highly rated.

− The Net Promoter score for CommuterDirect.com is 58%.
2018 Key Takeaways

MAIN TAKEAWAYS (Continued)

- Most current surveyed customers use the electronic smart benefit (63%) and the majority find it easy to set up.
- Awareness, use, and satisfaction with renewable order service are high. 74% of active customers who were surveyed in this study are likely to very likely to use it in the future.
- Half of current surveyed respondents contacted CommuterDirect.com for a problem, and were satisfied with the assistance.
- The data shows that CommuterDirect.com might be impacting some level of behavior change with 30% changing behavior after visiting CD and 11% indicating that CD might have influenced this change.
- This is important if read in conjunction with 28% of customers having driven alone on most days before visiting CommuterDirect.com.
Background, Objectives and Methodology
Background and Objectives

- In FY18 Arlington County Commuter Services (ACCS) received a grant from the Department of Rail and Public Transportation (DRPT) to execute evaluations of customer experience and satisfaction for CommuterDirect.com.

- CommuterDirect.com has 30,000 customers with online accounts who make monthly purchases of fare media, transit benefit customers, and an additional 20,000 online customers who make periodic purchases of tickets and passes.

- Given growing competition for CommuterDirect.com® as a seller of transit fare media in the Washington region, ACCS and the operators of CommuterDirect.com® want to ensure that the site provides the best customer experience possible so as to retain and expand both the individual and corporate customer base and to continue to make it easy for people to choose transit options over private cars.

- To do so, Mobility Lab developed two surveys, one for current customers and another for lapsed/inactive customers who have not made any purchase in the past 4 months. Respondents took the survey between 11/07/2017 and 12/07/2017.

- Both surveys asked questions about socio-demographic questions (i.e. income, employment), purchasing behavior (kind of service they buy passes for and the types of passes they buy now and the ones they used to buy), level of satisfaction with CommuterDirect.com and other questions on loyalty.
Methodology

- The analysis in this report was conducted based on responses by 5874 current customers and 1784 inactive/lapsed customers. 52 current respondents were removed due to a high number of missing responses.

- This survey follows two others conducted by ACCS in 2007 and 2012. For questions corresponding to similar questions asked in the 2012 survey, a qualitative comparison was made between responses from 2018 and responses from 2012. However, it is critical to note that readers should be careful in misinterpreting comparisons or ascribing too much importance to certain deviations given the qualitative nature of the survey and limited statistical significance. Some differences in the questions across the years were highlighted throughout the presentation.

- The rest of the presentation is divided into the following sections User Demographic profile:
  - Travel behavior
  - Travel Demand Management
  - CD experience, satisfaction and loyalty
  - CD and behavioral change
  - Conclusion

Throughout the presentation, survey respondents are referred to as either current (i.e. active users) or lapsed (i.e. inactive users).

*The analysis and reporting on the Net Promoter score was done by WBA Research but was included here for comprehensiveness.
All current and most lapsed (60%) currently have an account.

Q: Do you currently have or have you ever had an account with CommuterDirect.com?

*no similar question appeared in the 2012 report*

Nlapsed = 1874;
Ncurrent = 5738
Half of lapsed customers did not make a purchase in the past 6 months.

Q: *When was the last time you made a purchase on CommuterDirect.com?*

*no similar question appeared in the 2012 report*

N_{lapsed} = 1874;
N_{current} = 5738
Most current users (89%) access their CommuterDirect.com account using a computer, followed by a smartphone (8%).

Q: On what device do you typically access your account?

*This question was not included in previous surveys

Nlapsed = 1874; Ncurrent = 5738
Most inactive users are from Maryland, followed by Virginia and Washington DC. 10% of Virginia come from Arlington. A total of 2% are from Arlington, Virginia.

Q: What is your home zip code?

Nlapsed = 1874
Most active users are from Maryland. About 25% are from Virginia. Less than 2% of Virginia zip codes are in Arlington.

Home Zip Code for Active Residents

- **Maryland**: 71.69%
- **Virginia**: 24.50%
- **Other**: 4%

Q: What is your home zip code?

N_{current} = 5738
Most lapsed and current customers who took the survey are employed full-time. 8% of inactive users are not employed.

*The percentages are similar for 2012 and 2018

Q: What is your current employment status?

Employment
- 98% Current %
- 77% Lapsed %

**Current %**
- Employed full-time (35 hours or more per week): 98%
- Employed part-time (less than 35 hours per week): 1%
- Student full-time: 1%
- Not employed (keeping house, retired, disabled, looking for work): 8%

**Lapsed %**
- Employed full-time (35 hours or more per week): 77%
- Employed part-time (less than 35 hours per week): 3%
- Student full-time: 3%
- Not employed (keeping house, retired, disabled, looking for work): 2%

Nlapsed = 1874;
Ncurrent = 5738
The majority of current customer respondents are Boomers and GenXers. The majority of lapsed respondents are GenXers and Millennials (followed by Boomers). Still, digital natives (Millennials and GenX) make up almost half of the customer base.

*The majority of current account holders are still primarily Gen X and Boomers, but percentages of both groups have declined since 2012. Participation of millennials has increased since 2012, but non-users still outnumber users by more than half. (Compared excluding “no response”)*

Q: *In what year were you born?*

[Generations defined based on the Pew Research Center]

Nlapsed = 1874; Ncurrent = 5738
Most current and lapsed respondents are White (non-Hispanic) followed by African-American or Black.

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

*The percentage of participants who identify as white, non-Hispanic has decreased since 2012, while the percentage of Black/African American participants has increased.

Nlapsed = 1874;
Ncurrent = 5738
The largest share of current active respondents (42%) had a high income (>\$120K) followed by $60k to $120k (28%). The income distribution between these groups was the same for lapsed customers.

*Participants in 2018 were more likely to have higher incomes than in 2012, with household incomes below $120K decreasing and incomes above $120K increasing for active users.*

Q: *Which category best represents your household's total annual income?*

Nlapsed = 1874;
Ncurrent = 5738
More current and lapsed respondents were female than male.

Q: Are you ...?

*This is in contrast to 2012

N_lapsed = 1874; 
N_current = 5738
Most current respondents take the commuter train primarily followed by the bus. In contrast, “drive alone” took the highest share of primary modes for lapsed respondents.

Q: What type of transportation do you typically use to get to work or school?

*The 2018 survey also includes the new option of telework, and separates the categories of carpool/vanpool and bicycle/walk, which were combined in the 2012 survey. Commuter train was also the major mode in 2012 for current customers and drive alone for lapsed customers.

*Combined with “Other” (all under 2%): Carpool (ride with co-workers, friends or family members); Walk (entire trip from home to work); Vanpool (with co-workers or other who work nearby); Bicycle (entire trip from home to work)

Nlapsed = 1874;
Ncurrent = 5738
Over 50% of active-user respondents report living over a mile from transit. A greater percentage of lapsed respondents live closer to transit stops than active users.

Q: How far from your school or home is the nearest bus stop or train station?

*(Excluding “no response”) There has been little change in the distance active users live from transit since 2012; Similar to 2012, in 2018, a greater percentage of non-users live closer to transit stops than active users. (This information is presented in two different charts in 2012).

Nlapsed = 1874;
Ncurrent = 5738
The largest share (45%) of lapsed users live relatively close to work (10 miles or less) with most current users (56%) living between 20 and 40 miles from work.

* (Excluding “no response”) Active users were more likely to live slightly closer to work or school in 2018 than in 2012, but there was little change for most categories. Fewer active users live within 10 miles of work or school in 2018 than in 2012. There was no data presented on inactive users in 2012.

Q: About how far is it from your home to work or school?

N_lapsed = 1874;  
N_current = 5738
15% of respondents heard of and used The Commuter Store. That number is 8% for CommuterPage.com and 3% for ACCS.

Familiarity with Arlington TDM Programs

- No response
- 4. Don't know
- 3. Have not heard of this organization or service
- 2. Have heard of but not used this service
- 1. Have heard of and used this service

Q: The following are some other services offered by Arlington County. Please rate your level of familiarity and/or use with each of the following services.

*Less people have heard of and used the commuter store and commuterpage.com in 2018 than 2012

Nlapsed = 1874; Ncurrent = 5738
CommuterDirect.com active respondents are most likely to purchase fares for MARC (42%), followed by the MTA commuter bus (37%), Metrorail (32%) and VRE (23%). Lapsed riders who answered this question also mostly use MARC, followed by MTA Commuter Bus and Metrorail, then VRE.

Q: For which of the following transit services do you currently purchase passes, tickets, or other fares?

*this question had a high number of non-response (not shown here) which makes it harder to compare with previous years

Nlapsed = 1874; Ncurrent = 5738
MARC Monthly Pass (22%) and SmartTrip cards are the most popular purchases for active customers. SmartTrip cards are most popular for lapsed customers.

Q: Which of the following types of passes, tickets or other transit fares do you currently typically purchase?

*MARC (monthly) is still the most purchased pass but there is a stark drop in VRE (monthly); but difficult to compare here because of the non-responses

Nlapsed = 1874;
Ncurrent = 5738
89% of current respondents purchase tickets at CommuterDirect.com, others do it through their employer (5%) and online through WMATA (3%). Lapsed customers also purchase through WMATA (16%), The Commuter Store (9%), or through other channels.

*The question was different in 2012; but the 3 main places remain the same (commuterdirect.com, employer and WMATA.com).

*in a separate question, 61% of respondents from current users indicated that they only purchase fares through CommuterDirect.com

Q: Where do you currently purchase transit passes, tickets, or other fares?

*The question was different in 2012; but the 3 main places remain the same (commuterdirect.com, employer and WMATA.com).

*Combined with "Other" (all under 3%): Don’t know; With an agent at an Amtrak ticket counter; Online through another website; At a VRE ticket kiosk; Odenton Transit Center; At the VRE sales office; Frederick Transit Center; Through another source; Takoma Langley Crossroads Transit Center

Nlapsed = 1874;
Ncurrent = 5738
94% of current respondents rate their experience as good or excellent/very good. 75% of lapsed respondents rated their experience as good or excellent/very good.

*Respondents are more satisfied with CommuterDirect.com in 2018 than in previous surveys; users who rated their experience as excellent/very good has increased 18 percentage points since 2012.

Q: How would you rate your overall experience with CommuterDirect.com?

Nlapsed = 1874;
Ncurrent = 5738
Three-quarters of current customer respondents are very likely to recommend the service. Unsurprisingly, this drops to about half of lapsed users.

*The number of current users respondents very likely to recommend the service is up 7 percentage points; A similar percentage of non-users would recommend CommuterDirect.com to friend in 2018 as in 2012—over 50%.

N_{lapsed} = 1874;  
N_{current} = 5738
More than half of active-user respondents (53%) but also a high number of inactive user respondents (44%) recommended CommuterDirect.com.

Q: Have you ever recommended CommuterDirect.com?

*(Excluding “no response”) More users and non-users have recommended CommuterDirect.com in 2018 than in 2012.

N_{lapsed} = 1874;
N_{current} = 5738
Overall Net Promoter Score

Percentage of Promoters – Percentage of Detractors = Net Promoter Score

70% PROMOTERS
Rating 9-10

19% PASSIVE
Rating 7-8

12% DETRACTORS
Rating 0-6

58% NET PROMOTER SCORE

Percentage of Promoters – Percentage of Detractors = Net Promoter Score
Current Customer NPS: 65%

Lapsed Customer NPS: 34%
Trending Net Promoter Score

<table>
<thead>
<tr>
<th>Year</th>
<th>Promoters</th>
<th>Passive</th>
<th>Detractors</th>
<th>NPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>70</td>
<td>19</td>
<td>12</td>
<td>58</td>
</tr>
<tr>
<td>2012</td>
<td>67</td>
<td>Not available</td>
<td>14</td>
<td>53</td>
</tr>
</tbody>
</table>
Comparative Net Promoter Scores

- **CommuterDirect.com**: 58% (Current Customer: 65%, Lapsed Customer: 34%)
- **The Commuter Store (2018)**: 75%
- **ATP Services (2007)***: 61%
- **BikeArlington (2011)***: 58%
- **ART (2008)***: 84%

*These scores were calculated using a 5-point scale – strong conclusions should not be made based on comparisons with ComuterDirect’s and Commuter Store’s NPS (on an 11-point scale).
Q: Have you ever recommended CommuterDirect.com?
At least 65% of respondents found the services good to very good. Readability received the highest rating and technical issues the lowest rating.

Q: How would you rate the CommuterDirect.com website on each of the following characteristics?

*Readability and information received similar rating from 2012, reports went down and registration process went up

Ncurrent = 5738
63% of active respondents use electronic SmartBenefits on CommuterDirect.com.

Q: Do you currently use electronic SmartBenefits on CommuterDirect.com?

*Similar percentages to 2012 (68%)

Ncurrent = 5738
67% of respondents who used SmartBenefits on CommuterDirect.com found it to be easy to set up.

Q: How would you rate the ease of setting up electronic SmartBenefits on CommuterDirect.com?

*The percentage of respondents who found SmartBenefits to be easy to set up slightly decreased between 2012 and 2018.

N_{current} = 5738

N_{used Smartbenefits} = 3628
Awareness (95%) and use (75%) of renewable-order services are high.

*the percentage aware of renewable order service remained the same between 2012 and 2018. The percentage who use it went down (from 84% in 2012).

Ncurrent = 5738
91% of current surveyed customers who used renewable order service had a good to very good experience with the renewable-order service on CommuterDirect.com.

Q: How would you rate your experience with the renewable order service on CommuterDirect.com?

*this percentage went slightly up from 2012 (89%).

Nservice users = 4326
74% of current surveyed respondents are likely to very likely to use the renewable-order service in the future.

Likelihood of using Renewable Order Service in the future
(Current Customers)

- (blank) 22%
- 5. very likely 67%
- 4 7%
- 3. neutral 3%
- 2 1%
- 1. very unlikely 1%

Q: In the CommuterDirect.com renewable order service, orders are automatically shipped monthly and arrive several days prior to the beginning of the month. How likely are you to use this service in the future?

*The results are similar to 2012

Ncurrent = 5738
46% said they had contacted CommuterDirect.com about a problem.

Had contacted CommuterDirect.com about a problem (Current Customers)

Don't know 3%  
No 51%  
Yes 46%

Q: Have you ever needed to contact CommuterDirect.com about a problem with the website or with a transaction?

*This percentage went down from 60% in 2012

N_{current} = 5738
38% of respondents contacted CommuterDirect within the past six months.

When the contact with CommuterDirect.com was made (Current Customers - who contacted CD)

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No response</td>
<td>1%</td>
</tr>
<tr>
<td>Within the past year</td>
<td>26%</td>
</tr>
<tr>
<td>Within the past six months</td>
<td>28%</td>
</tr>
<tr>
<td>Within the past month</td>
<td>10%</td>
</tr>
<tr>
<td>Longer than a year ago</td>
<td>34%</td>
</tr>
<tr>
<td>Don't know</td>
<td>2%</td>
</tr>
</tbody>
</table>

Q: *When did you make this contact (if you have contacted the more than once, please indicate the most recent time)?*

*This percentage went down from over half of respondents in 2012*

Ncontacted CD = 2641
Most respondents who made contact (85%) were satisfied to very satisfied with their contact.

**Satisfaction with the contact made**  
(Current Customers - who contacted CD)

- No response: 2%
- 5. very satisfied: 55%
- 4. satisfied: 30%
- 3. neutral: 7%
- 2. dissatisfied: 3%
- 1. very dissatisfied: 2%

Q: How satisfied were you with your most recent contact regarding CommuterDirect.com?

* This percentage increased from 77% in 2012

Ncontacted CD = 2641
Fulfillment services are rated highly.

Q: To what extent do you agree with the following statements regarding the way items you purchase from CommuterDirect.com are typically delivered to you?

- The shipping and handling fees are reasonable
- The contents of the package match my order
- I do not have a problem with receiving my package
- The package arrives in a timely manner

<table>
<thead>
<tr>
<th>Statement</th>
<th>1. strongly disagree</th>
<th>2. disagree</th>
<th>3. neutral</th>
<th>4. agree</th>
<th>5. strongly agree</th>
<th>6. don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>The shipping and handling fees are reasonable</td>
<td>11%</td>
<td></td>
<td>67%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The contents of the package match my order</td>
<td>9%</td>
<td></td>
<td>84%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I do not have a problem with receiving my package</td>
<td>11%</td>
<td></td>
<td>79%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The package arrives in a timely manner</td>
<td>11%</td>
<td></td>
<td>82%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* This is similar to 2012

Ncurrent = 5738
Impact: Behavioral Change
40% of current active respondents indicated having done some sort of travel change after they first started using CommuterDirect.com. Top changes included teleworking more often (9%) or starting to ride the train to work (8%).

Q: Since you first started using CommuterDirect.com, have you made any of the following changes in how you make work trips? Please check all that apply.

*This percentage is higher than 2012. However, there were no reporting of telecommuting in 2012.

*Combined with “Other” (all under 1%):
- Carpool or vanpool to work more often
- Started riding bicycle to work
- Walk to work more often
- Ride bicycle to work more often
- Started carpooling/vanpooling to work
- Started walking to work
- TNC (e.g., Lyft & Uber)

Ncurrent = 5738
11% of current active respondents indicated that some information, service, or benefit received from CommuterDirect.com influenced or assisted them in making a change in behavior.

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

*Half the percentage of respondents were influenced or assisted by CommuterDirect.com in making this change in 2018 than in 2012.

N_{current} = 5738
Most respondents, before they started using CommuterDirect.com, rode the train or bus all or most days (38%) or drove alone (28%).

*This question has more response options in 2018 than in 2012. The same percentage of respondents drove alone before making this change in 2012 than in 2018. Fewer rode a train or bus before the change in 2018 than 2012.*

Q: How did you typically travel to work before you started using CommuterDirect.com?

Ncurrent = 5738
Conclusion
Conclusion and Future Work

- The analysis in this report is important for assessing the level of satisfaction and loyalty of CommuterDirect.com customers and ensuring continuing service that meet traveller’s needs.
- The implications for behavioral change are also important as part of the customers who visit CommuterDirect.com “drive alone” for most of their trips.
- The repetition of such analysis over time is valuable in monitoring satisfaction and ensuring users and would-be users’ needs are met.
For additional information on this study, contact:

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info@mobilitylab.org