



# *ACCS 2007 Commuter Store™ Study*

*FINAL: July 2007*

*Prepared By*



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# Study Objectives & Methodology

# Study Background

- This research study is a component of the 2006-2008 ACCS Program Research and Evaluation Plan.
- The overall purpose of this study is four-fold:
  1. To understand how *The Commuter Store*<sup>™</sup> concept is currently performing.
  2. To identify ways to improve the product and service delivery.
  3. To measure the overall impact of ACCS' investment in the *Commuter Store*.
  4. To establish benchmarks to assess future performance gains.

# Study Objectives

- Profile ACCS' *Commuter Stores*' current users.
- Identify what prompted visit
- Assess the current customer experience and satisfaction with *The Commuter Stores*.
- Identify store users' needs for commuter information, fare media, and trip planning assistance services.
- Understand extent to which store is meeting needs - based on attributes of "retail experience"
- Find perceived opportunities and challenges with stores' existing products/services.
- Identify return on investment/impact/results - did they influence or support travel change.
- Understand the previous from different perspectives - by audience sub-segments - e.g., repeat customers vs. first time, etc.

# Methodology

- Intercept survey at 3 stores (mobile store excluded)
  - Fieldwork conducted March 27-April 5, 2007
  - Interceptors approached customers as they were leaving the store
  - 1-minute, four-question intercept survey
- Interceptors asked respondents also to take a 10-12 minute online survey
  - \$5 Starbucks gift card offered for completing online survey
  - Spanish version of survey available via telephone and a Spanish-speaking agent was stationed at the Ballston Store; ultimately, no one took the survey in Spanish
- Online survey available at in-store computer or off-site
  - Both on-site and off-site respondents reported on the visit at which they were intercepted
  - Intercept questionnaires coded to match the online survey

# Response Breakdown

Store	# Pre-questionnaires	# Online	# InStore/ OutofStore
<i>Ballston</i>	199	171	165/6
<i>Crystal City</i>	337	200	200/0
<i>Rosslyn</i>	202	176	174/2
<b>TOTAL</b>	<b>738</b>	<b>547</b>	<b>539/8</b>

- Given the number of completes per store and differences in Store customer profile, the sample from each store is viewed separately rather than combined into an overall total.

# Key Commuter Store-related Findings from 2006 Arlington Resident Study

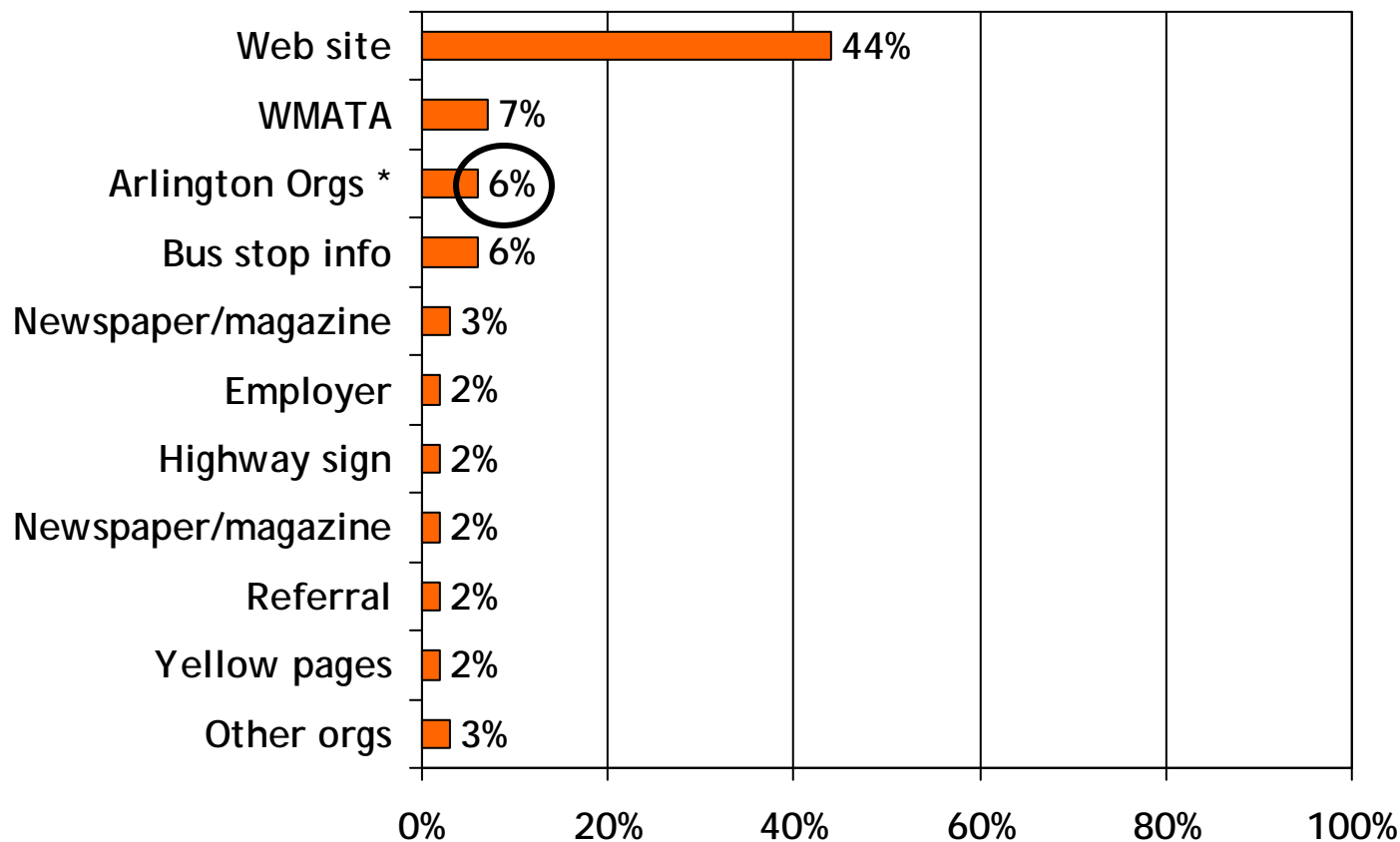
## Recall that in the 2006 Resident Study, About Half Sought Transportation Information

- 52% of all residents sought information on types of transportation they could use and 47% sought transportation services.
- Who sought information?
  - Age 35-49 years old (60%) vs. other ages (51%)
  - Work outside Arlington (56%) vs. work inside (46%)
  - College/advanced degrees (56%) vs. HS or less (34%)
  - Lived in Arlington <10 years (54%) vs. >10 years (48%)
  - Employed and non-employed residents equally likely

Q K-1: In the past year, have you sought information on types of transportation you could use to get around the Washington metropolitan region?

Q K-2 In the past year, have you looked for services that could help you get around the Washington metropolitan region?

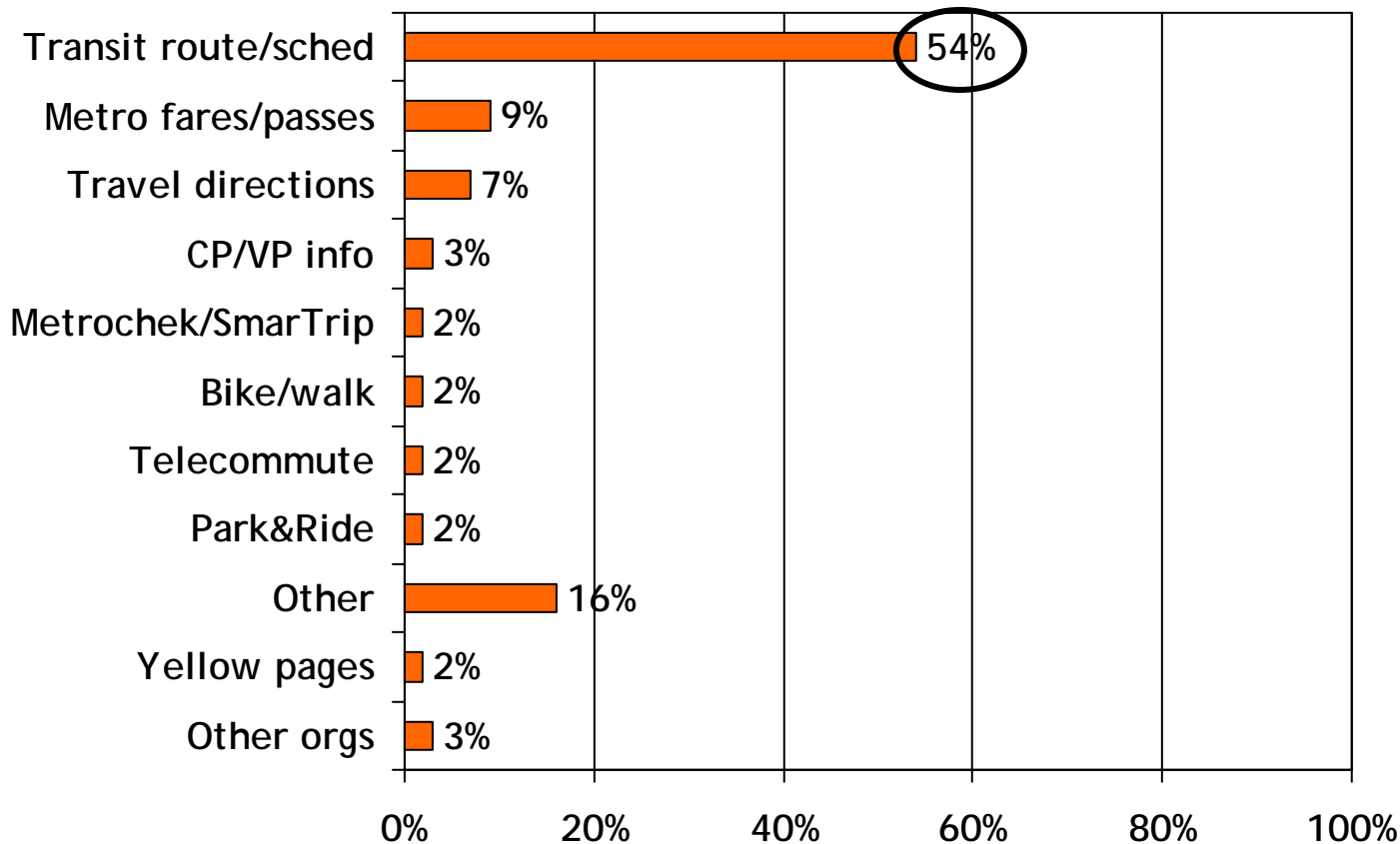
## 6% of Those Who Sought Information Used Arlington Organizations as Info Source



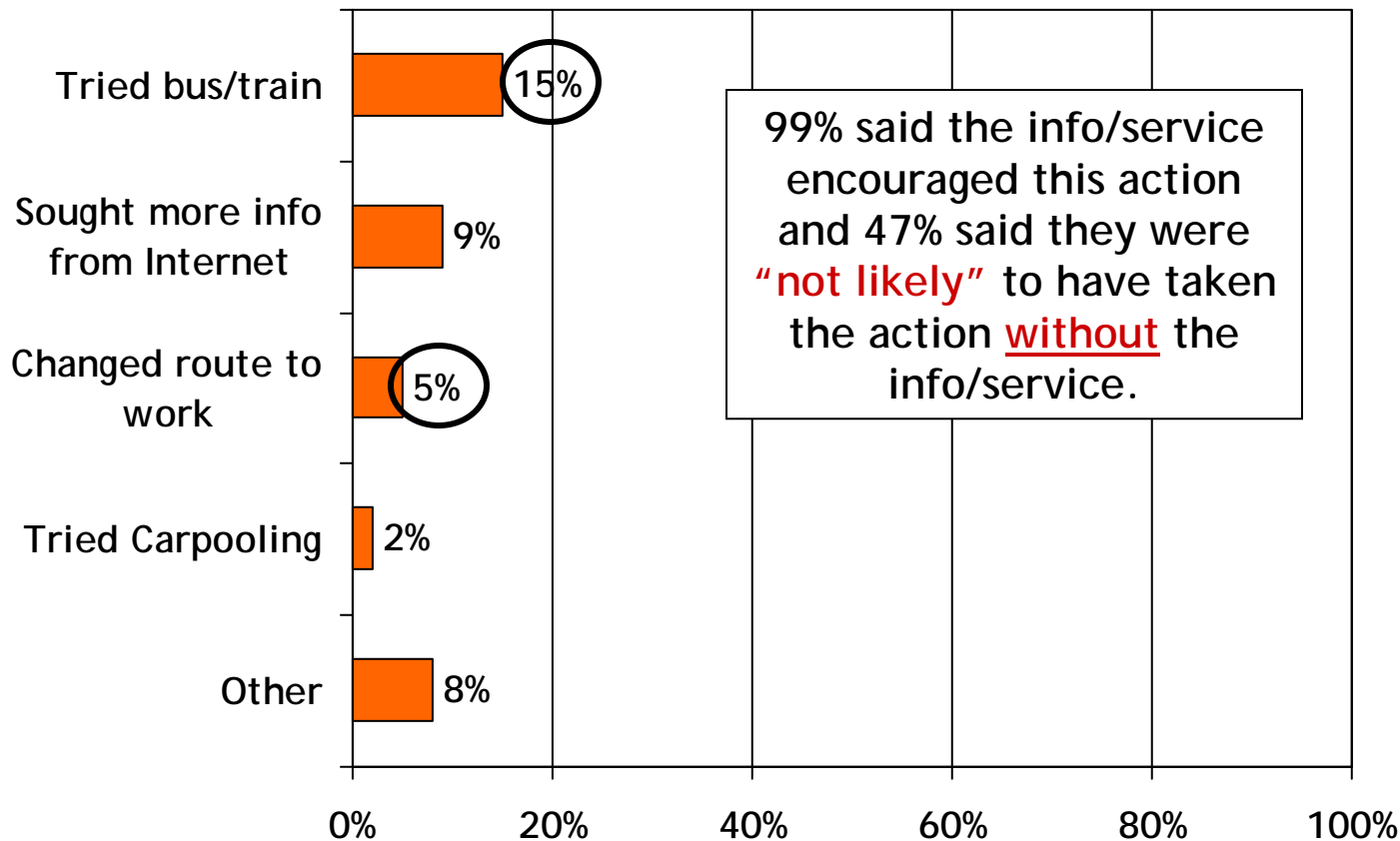
Q K-3: What sources did you use or contact to obtain this information or service?

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

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

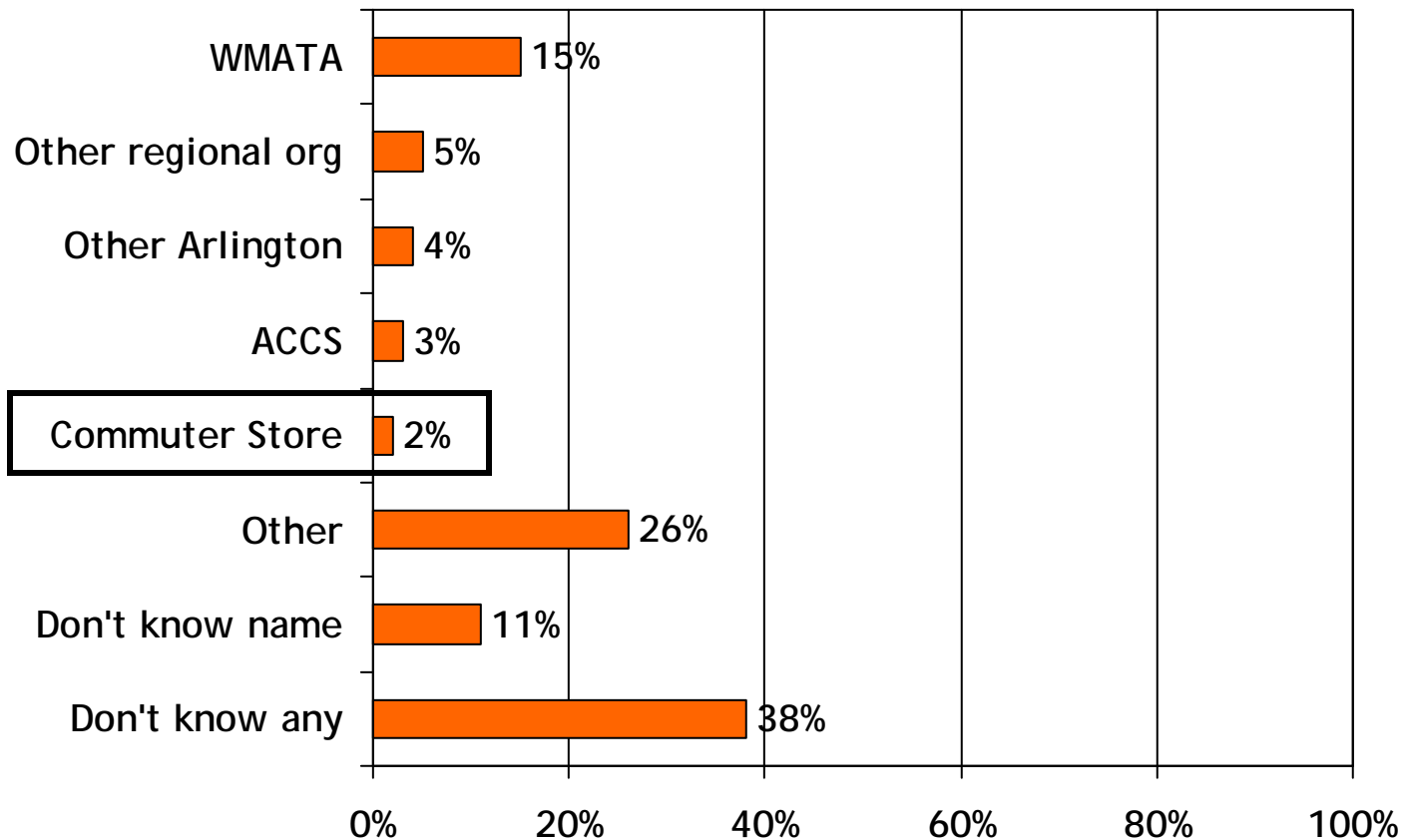


# Four in Ten Residents Who Sought Info/Services Took Action to Change Travel



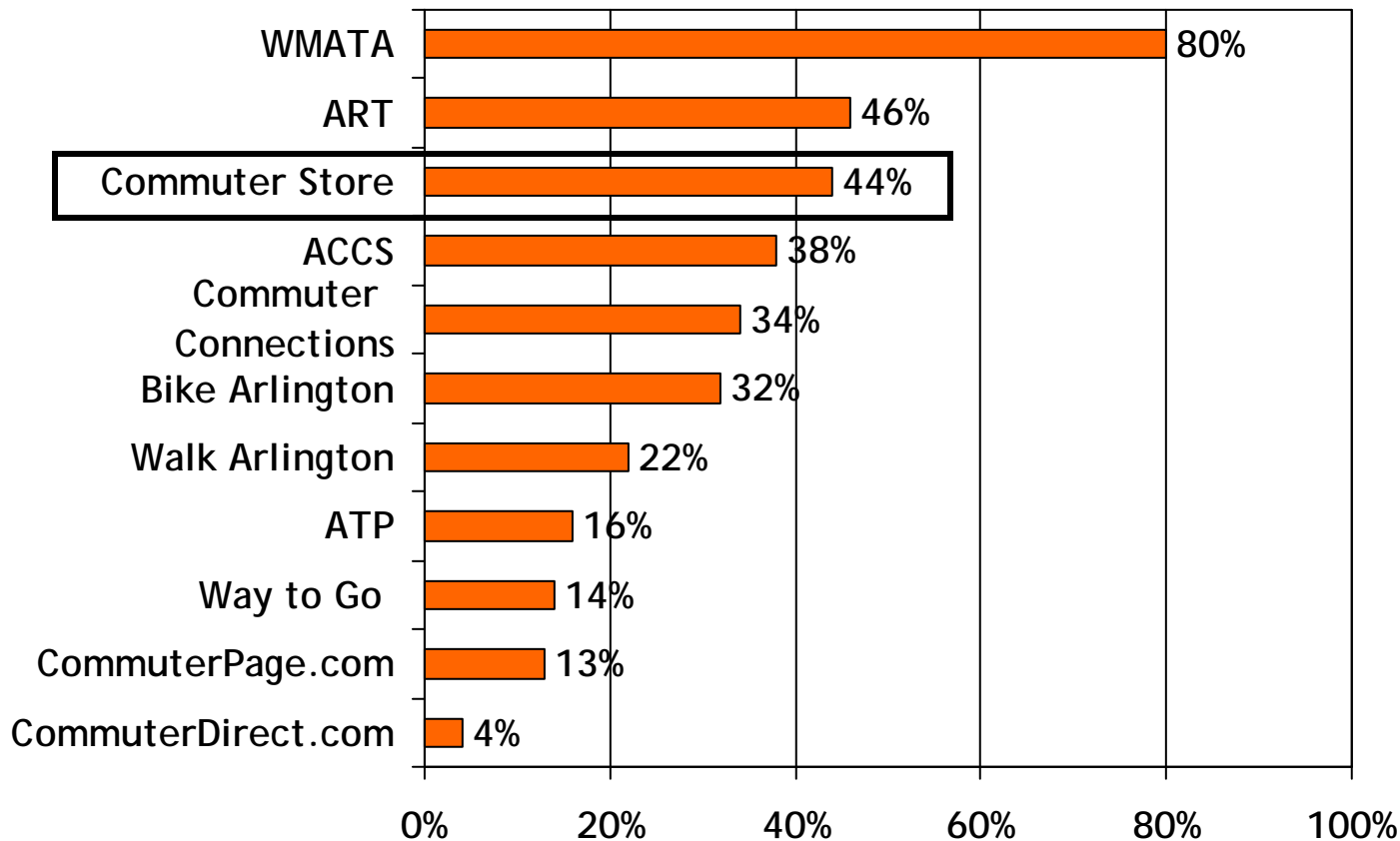
Q K-5: After obtaining this information or service, did you take any actions to try to change how you travel around Arlington or how you travel from Arlington to other destinations in the Washington metropolitan area?

## 2% Knew of the Commuter Store Without Prompting



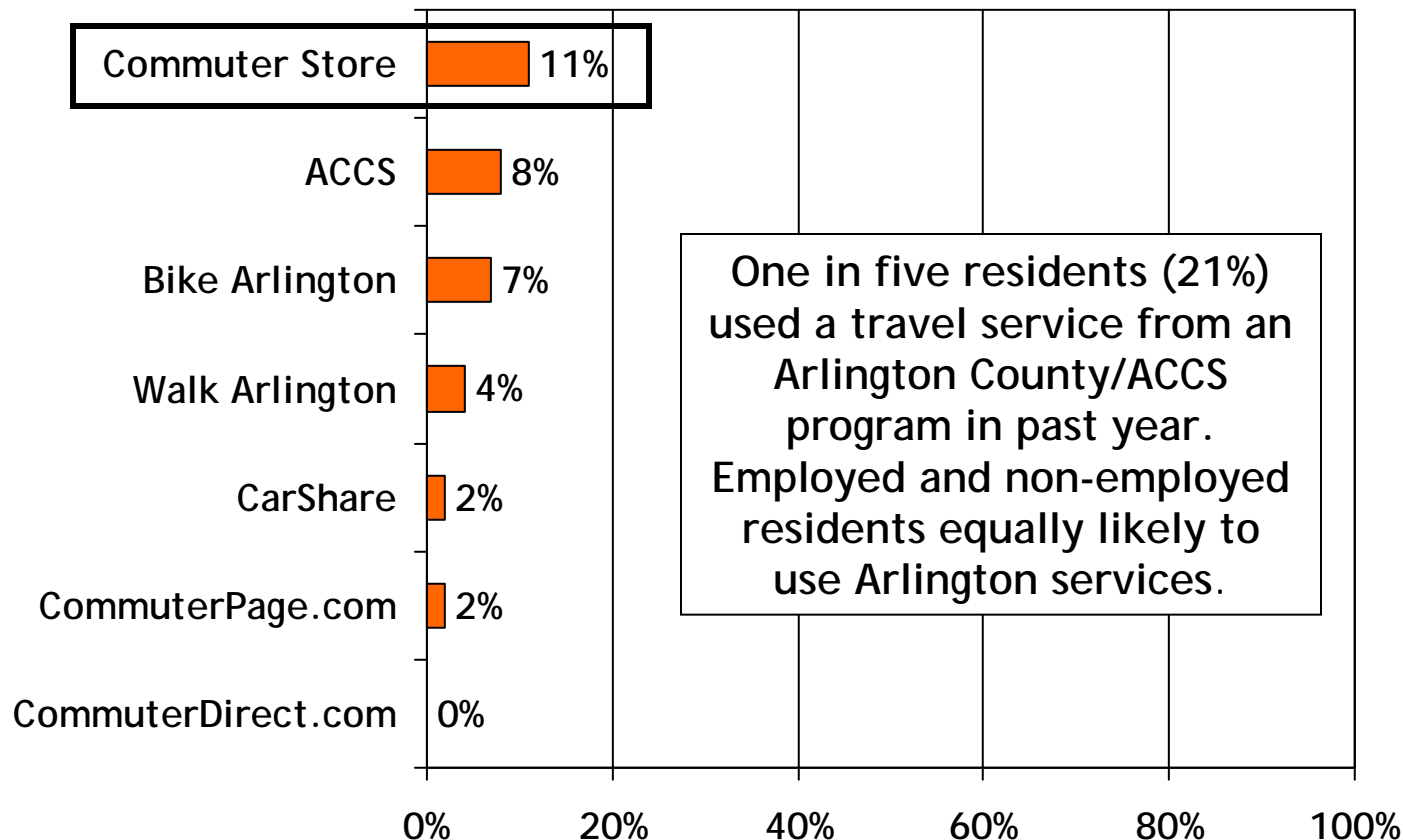
Q K-8 Do you know of any organizations, phone numbers, or website that provides information on getting around Arlington or around the Washington region?

# When Prompted, 44% Said they Knew of The Commuter Store



Q K-8 Now, I'm going to read you a list of organizations and programs that provide transportation information and assistance to Arlington residents. As I read each one, please tell me if you have heard of the organization or service.

## The Commuter Store is the Most Used Arlington Transportation Service Organization

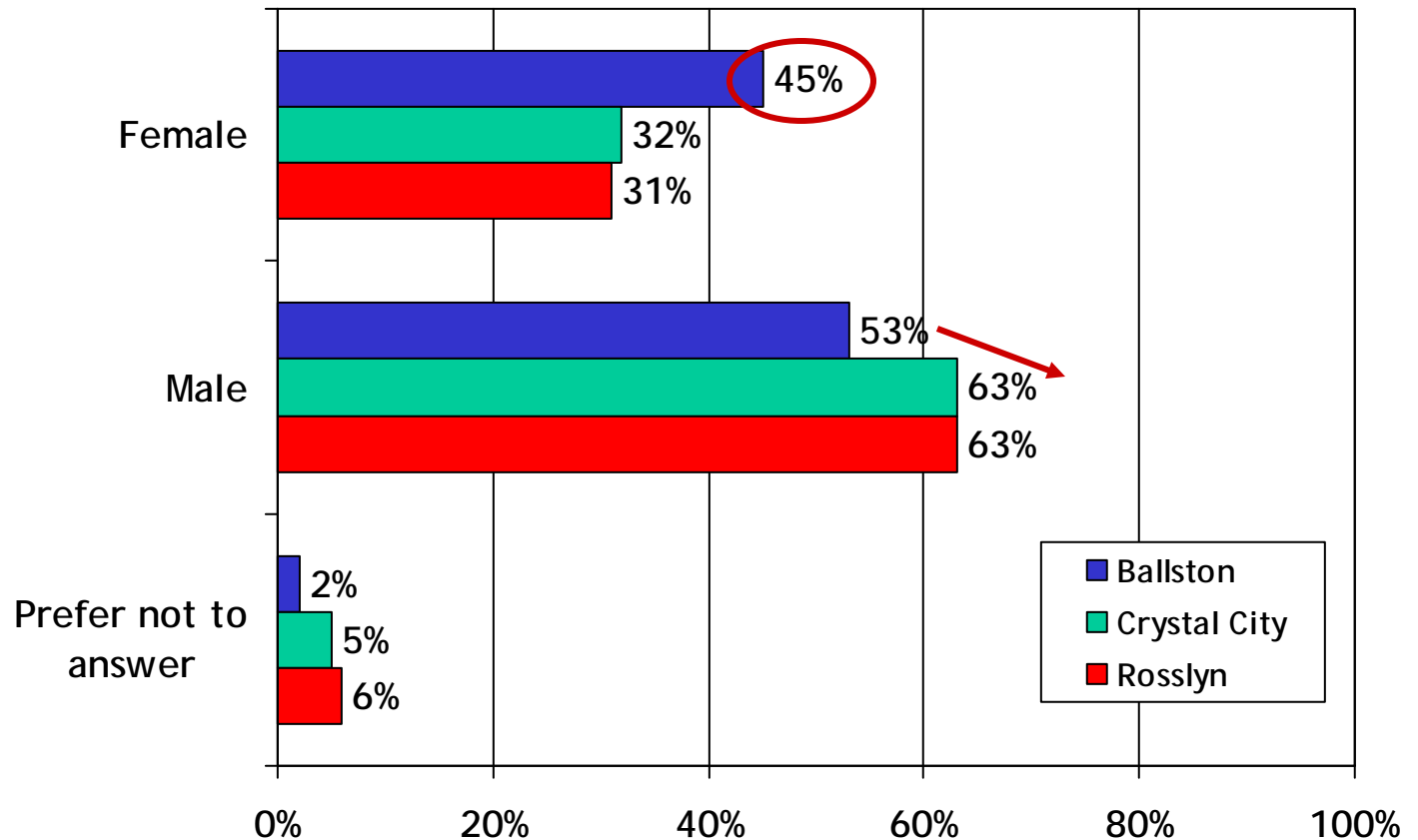


# Survey Respondent Profile

# *Who Are Commuter Store Patrons? Traditional Demographics*

# Commuter Store Customers Tend to be Male

## *Ballston Had the Most Female Respondents*

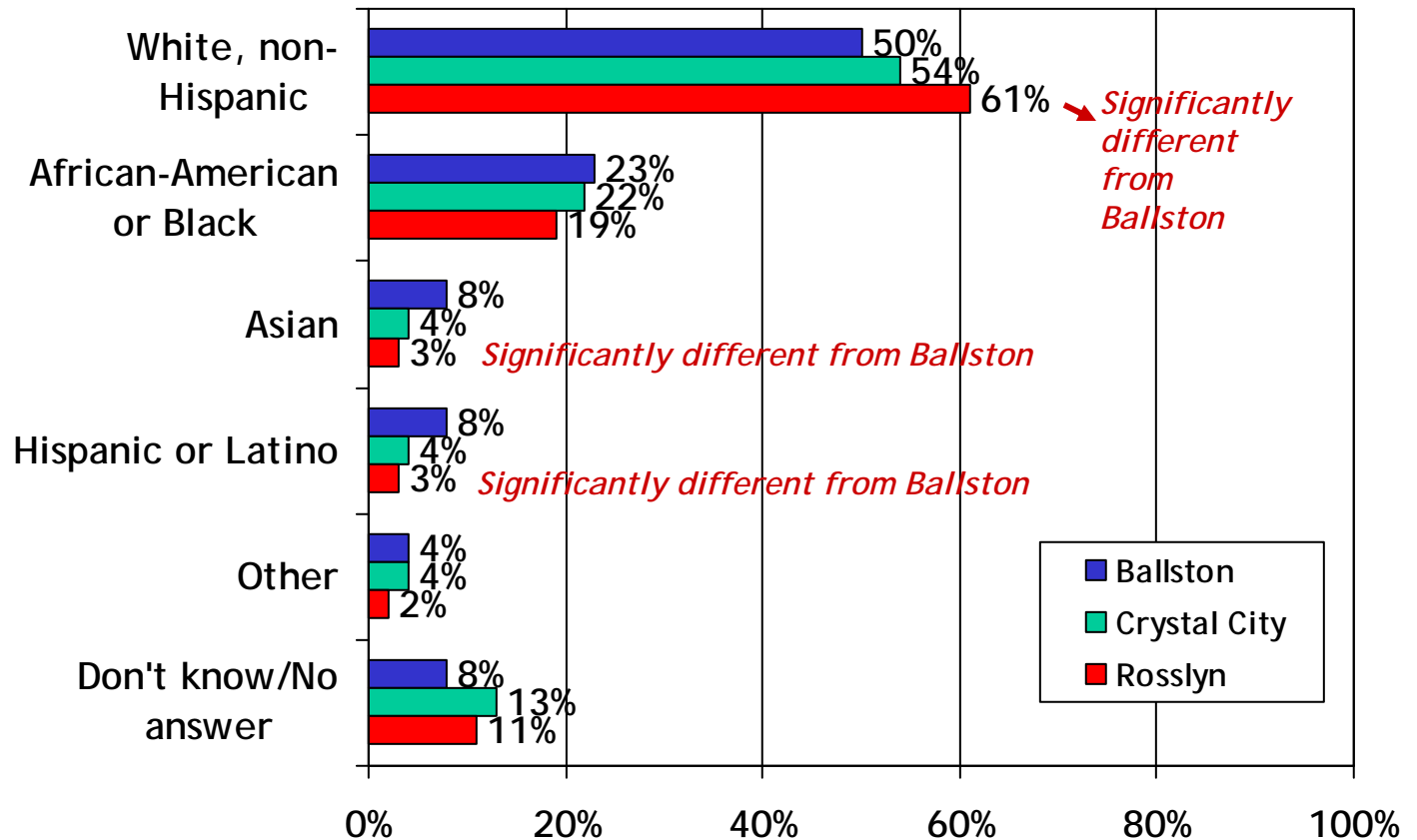


Note:  
Throughout  
the  
presentation,  
red circles and  
arrows  
indicate  
statistical  
significance at  
the 95% level.

Q28: Are you . . .

# Race Does Not Vary Much Among Stores

*A Little Over Half Consider Themselves "White"*

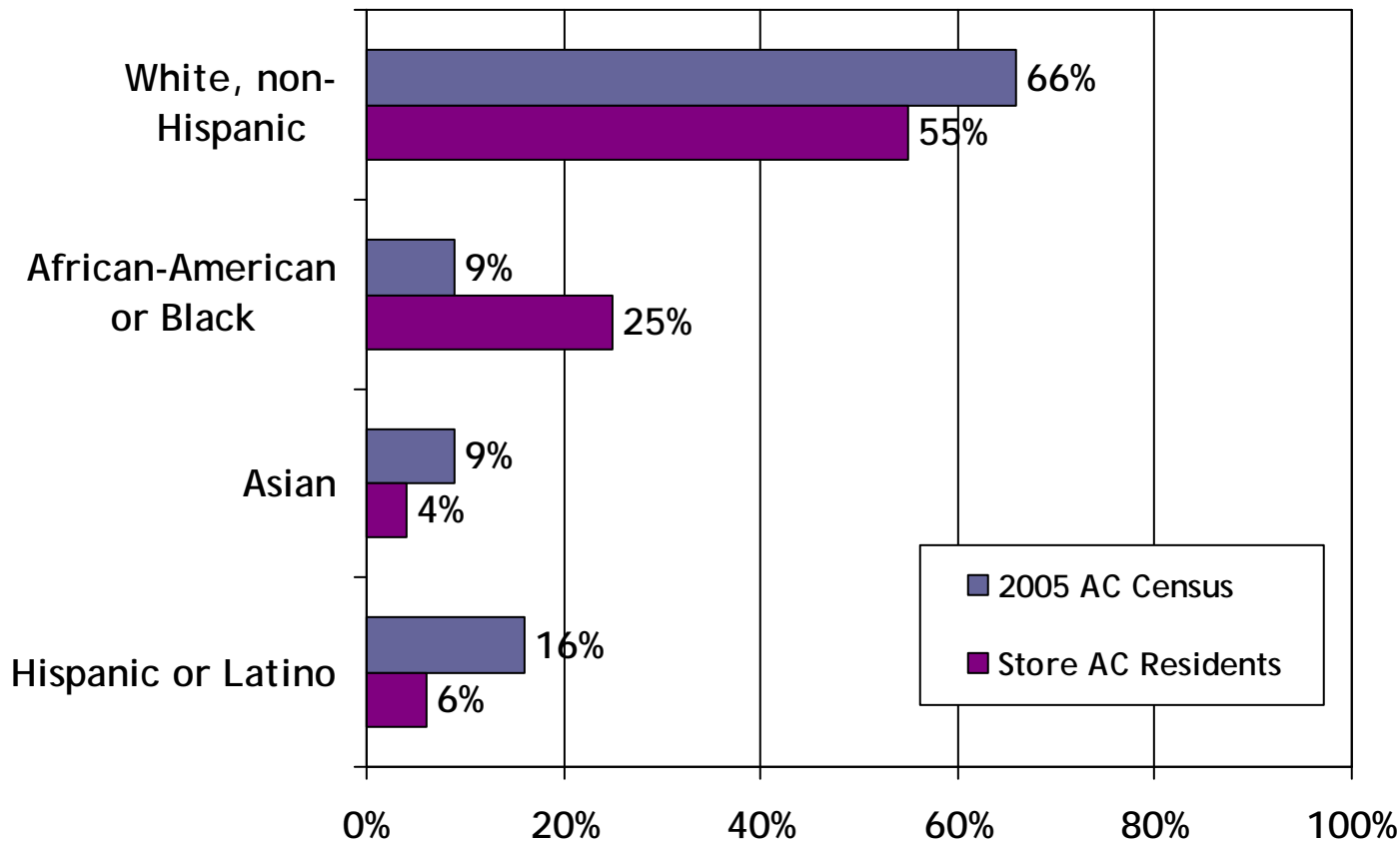


Q26: Which one of the following best describes your racial background?

2005 Census  
Data compared  
with 2007  
Commuter  
Store Study

# African-Americans are Over-represented While Whites and Hispanics are Under-represented

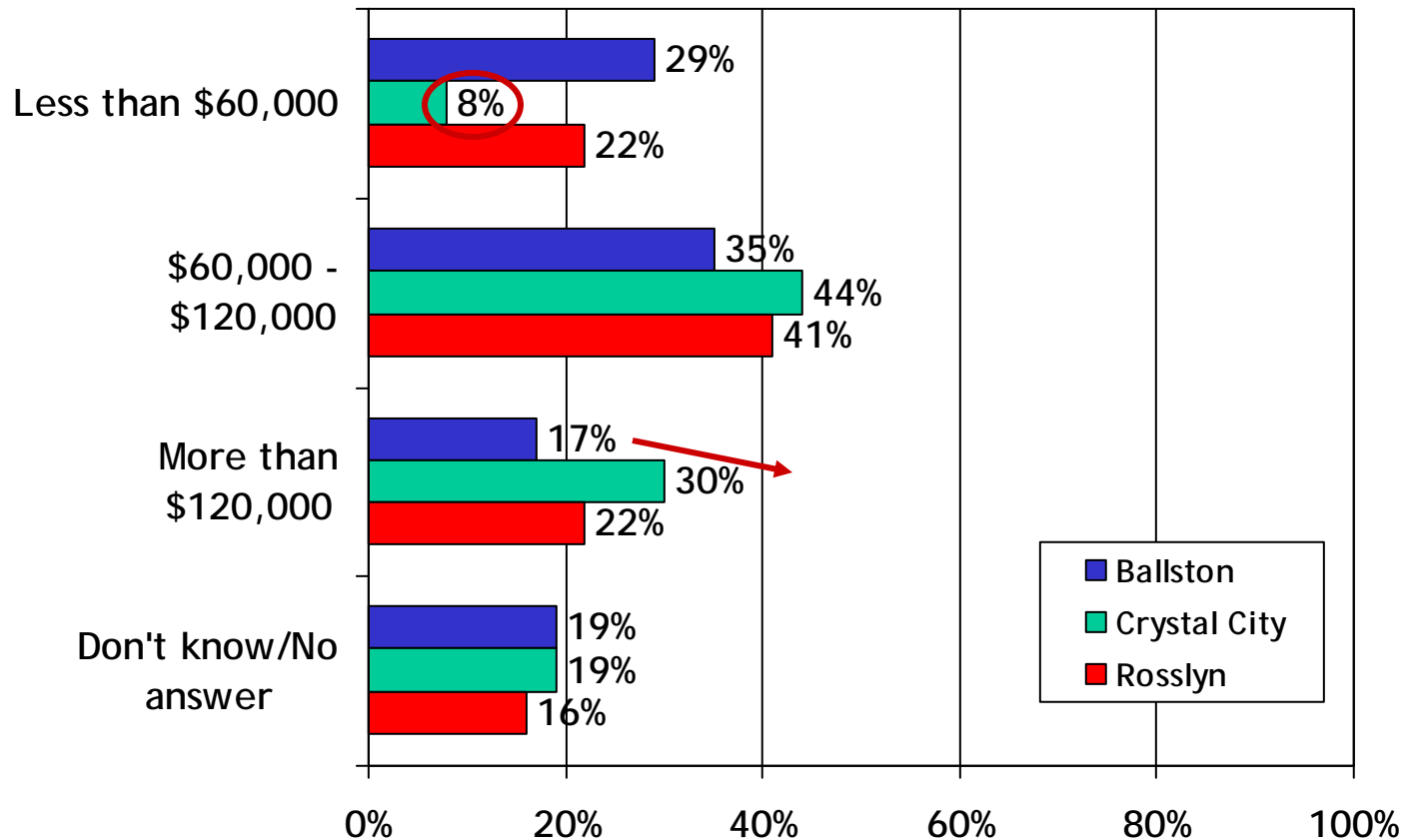
All are  
significantly  
different with  
the exception  
of "Asian."



05 AC Census  
n = 195,800

Store AC  
Residents  
n = 110

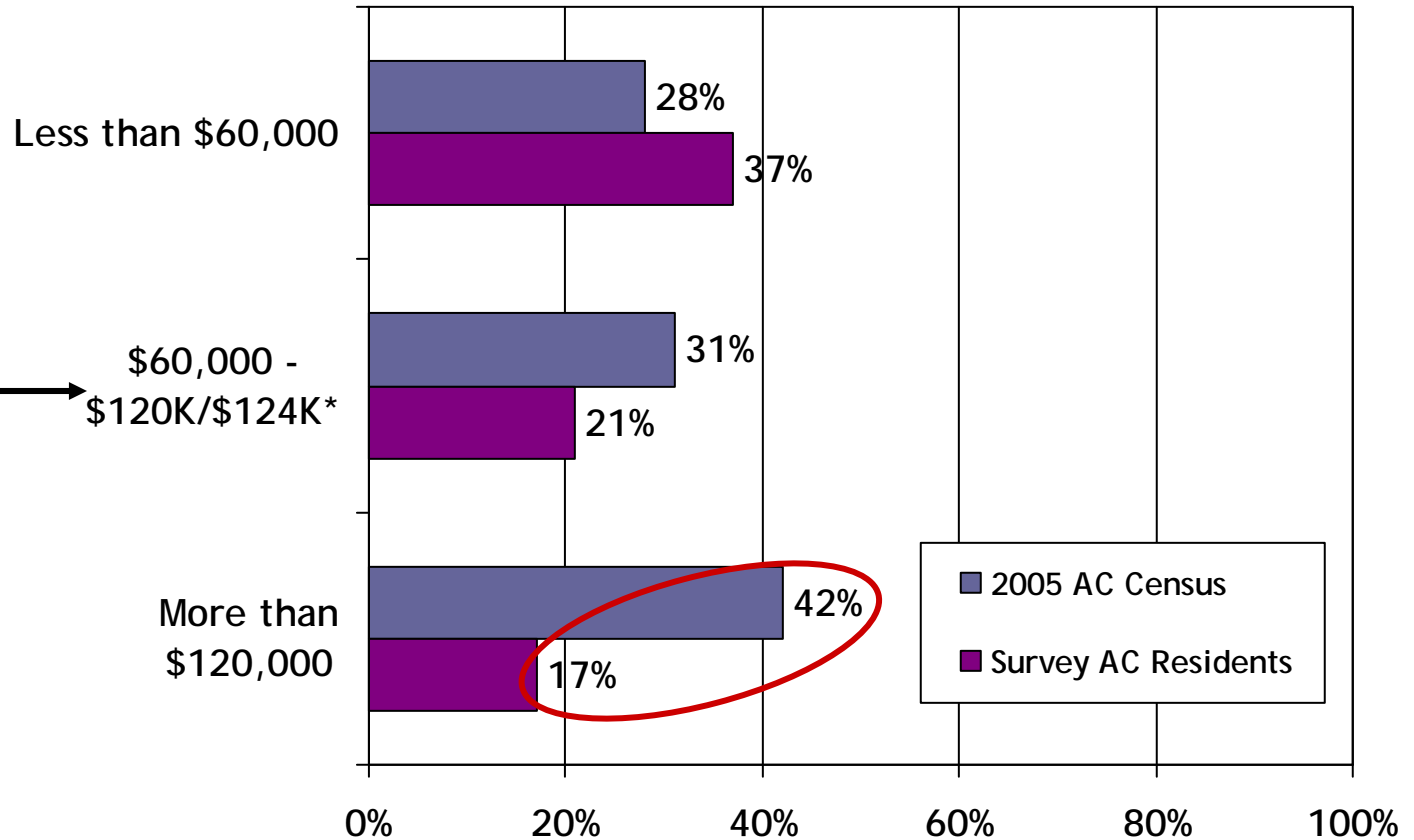
# Crystal City Customers Tend to Have Higher Incomes than do Customers of Other Stores



Q27: Which category best represents your household's total annual income?

2005 Census  
Data compared  
with 2007  
Commuter  
Store Study

# Lower Income Groups Are Well Represented



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

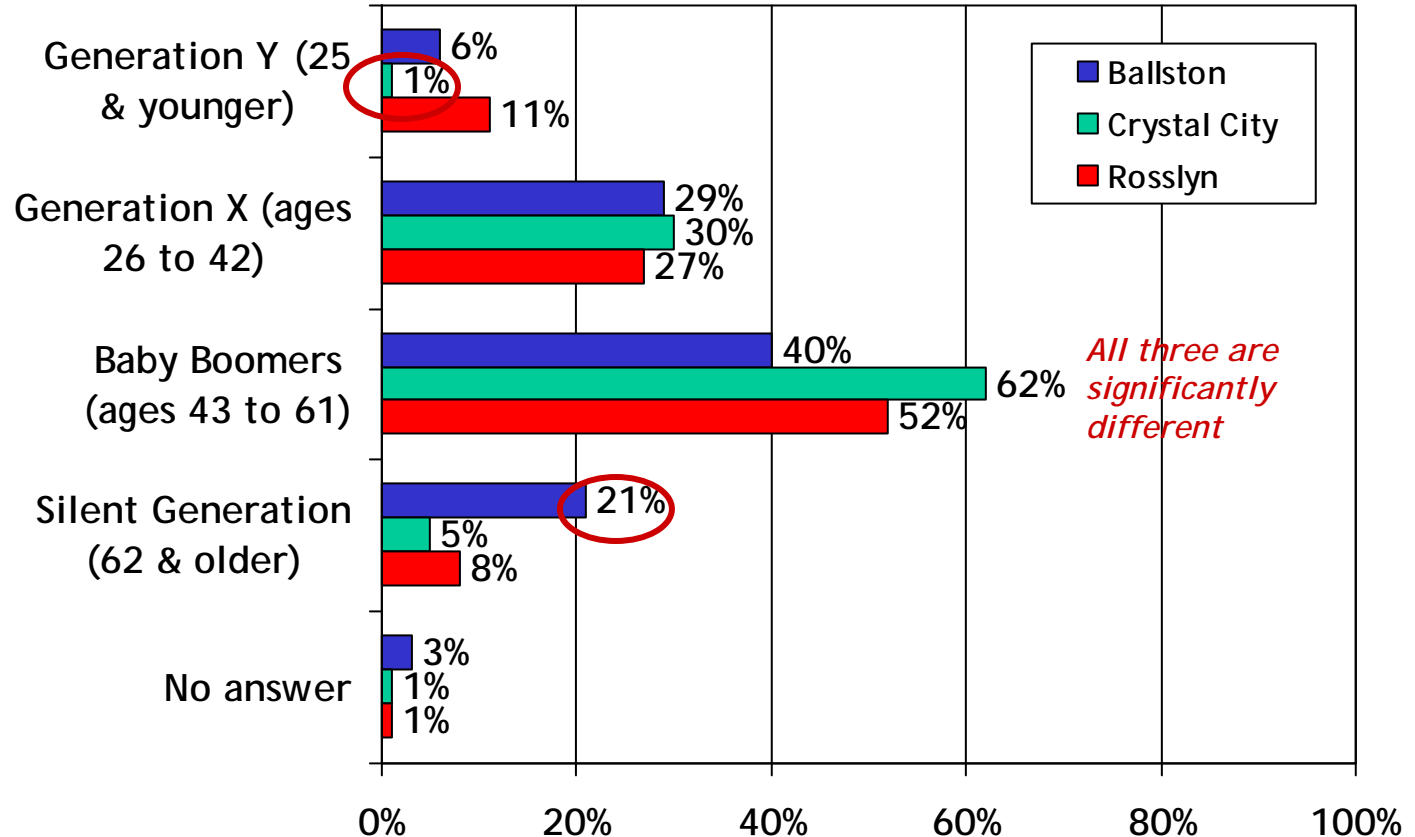
05 AC Census  
n = 37,578

Survey AC  
Residents  
n = 110

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

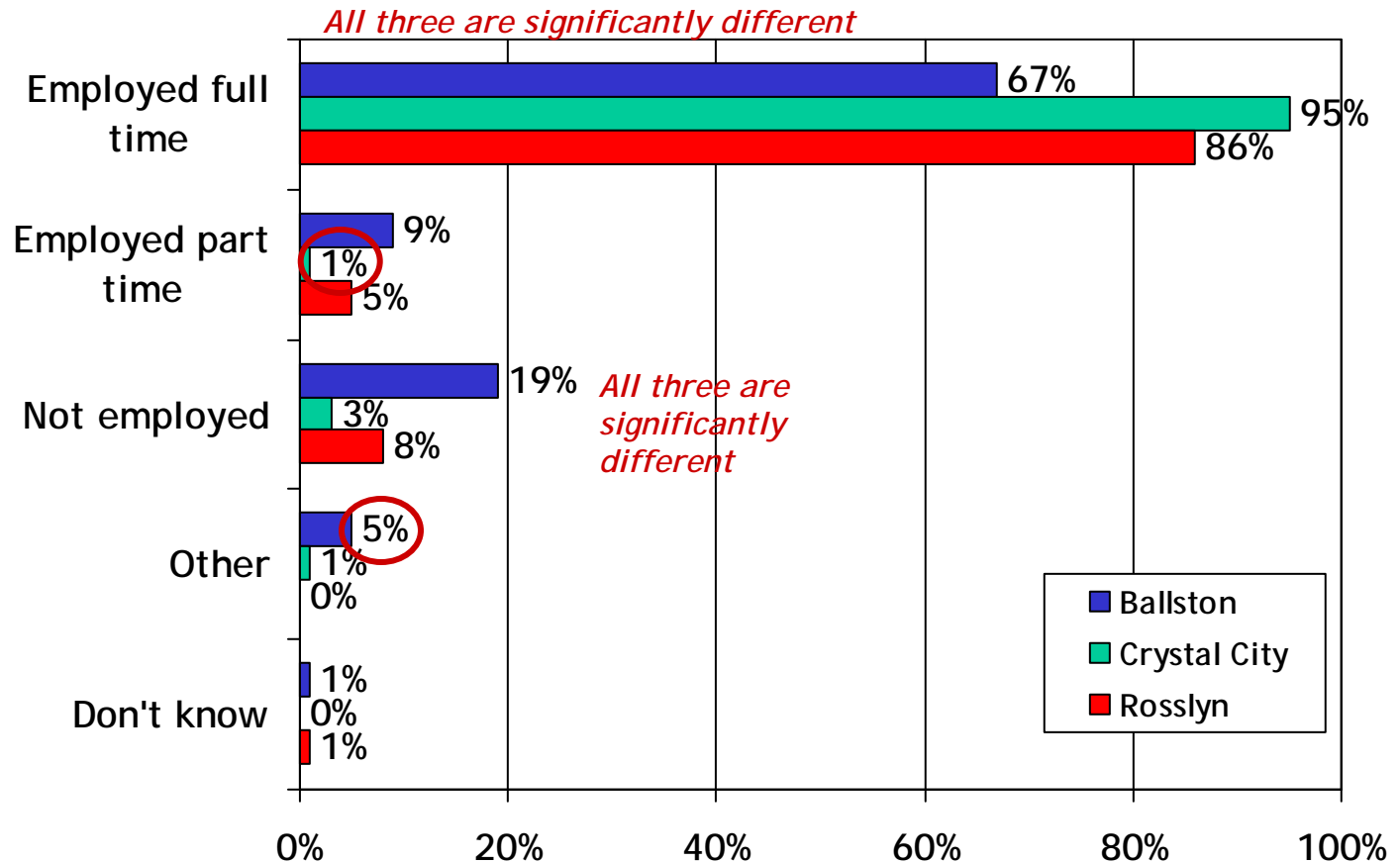


# Crystal City Respondents Are More Likely to Be Boomers; Ballston Has More Silent Generation Customers



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

# Crystal City Customers Are More Likely to Be Employed

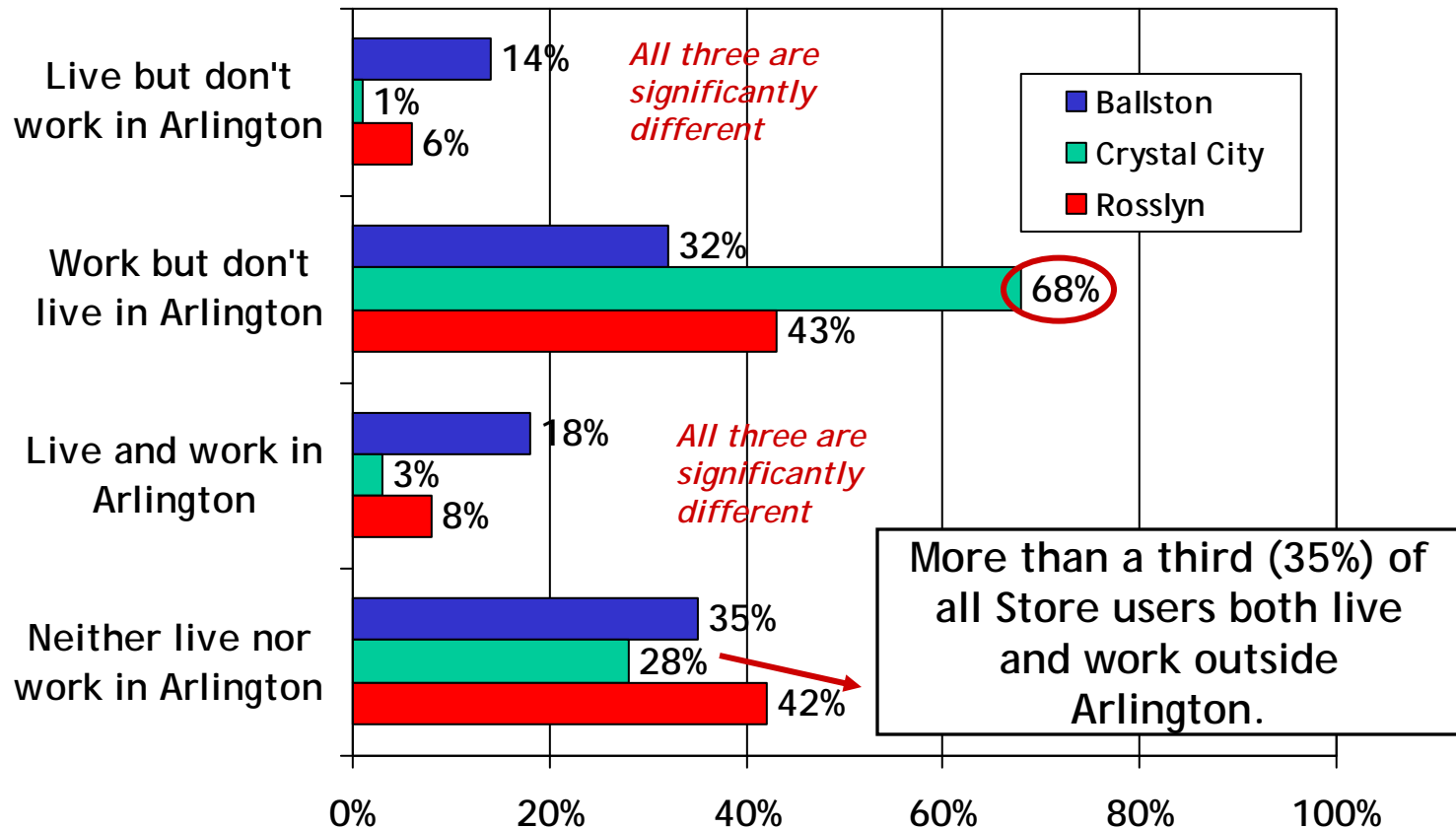


Q22: What is your current employment status?

*Where Do Commuter  
Store Patrons Live & Work?  
Respondent Zip Code Analysis*

# Surprisingly, 35% Neither Live Nor Work in Arlington County

See Appendix for Breakdown of Zip Codes

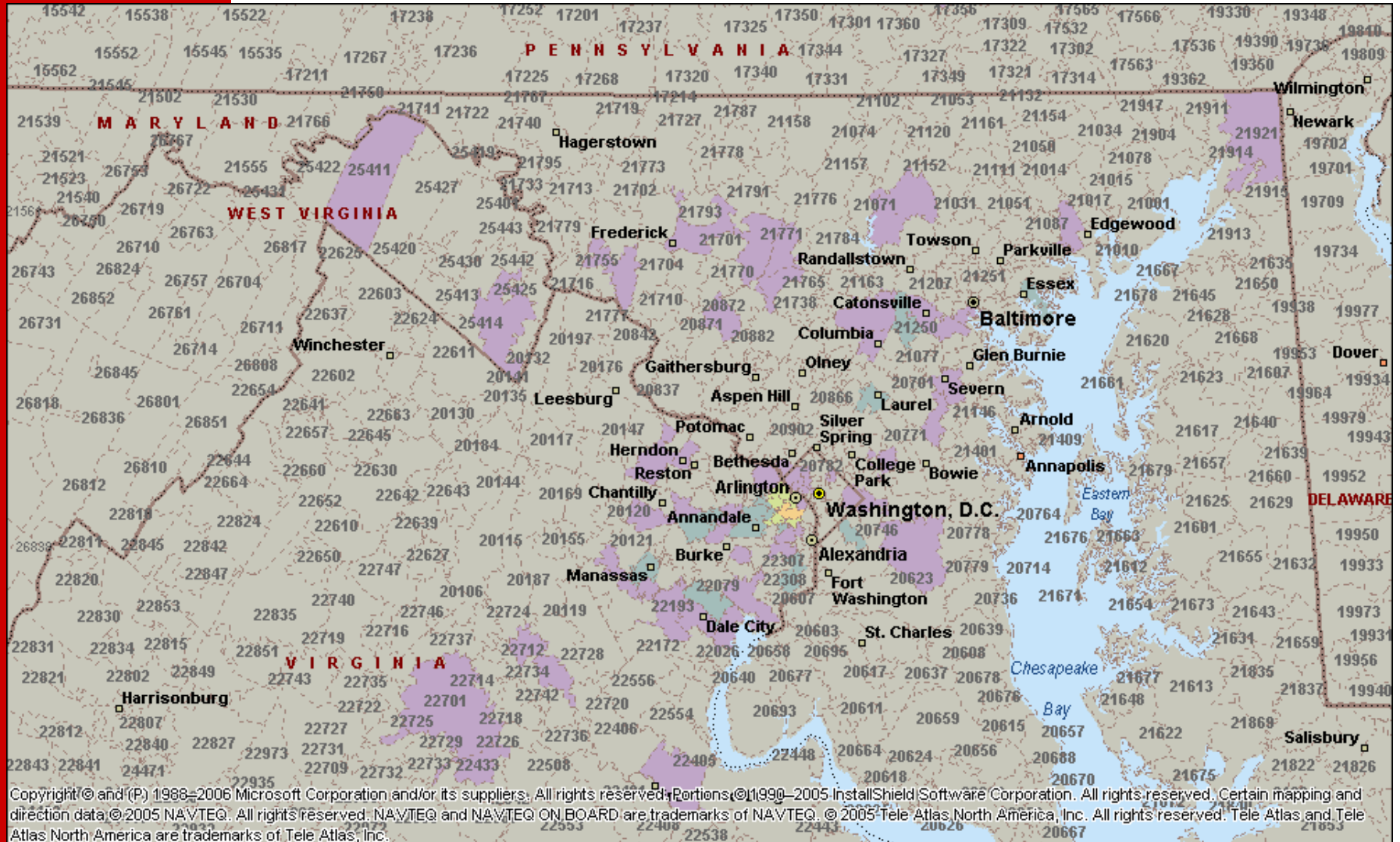


Q20: What is your home zip code?

Q24: What is your work zip code?

# Ballston Store Home Zip Codes

## Quantity by ZIP Code



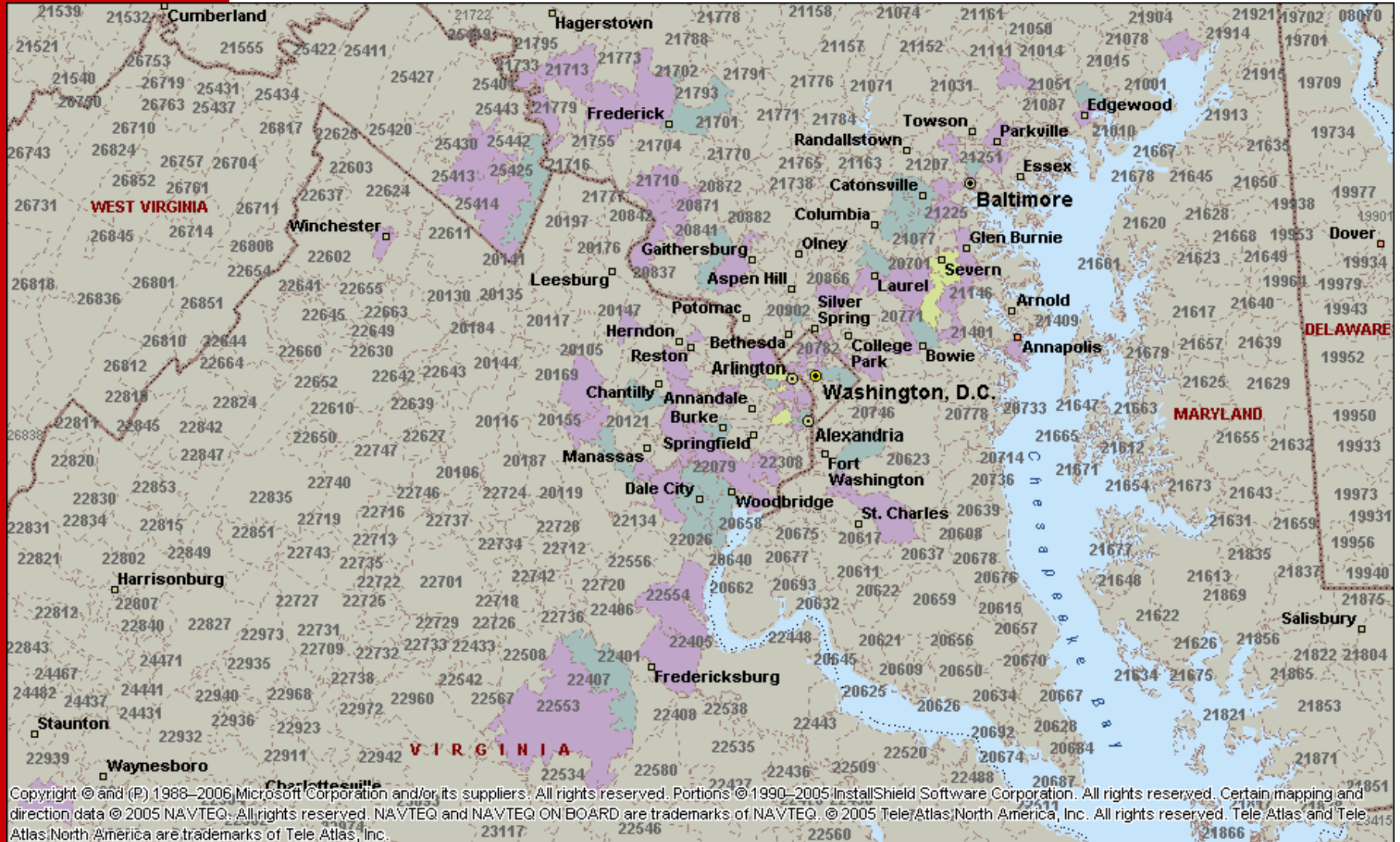






# Rosslyn Store Home Zip Codes

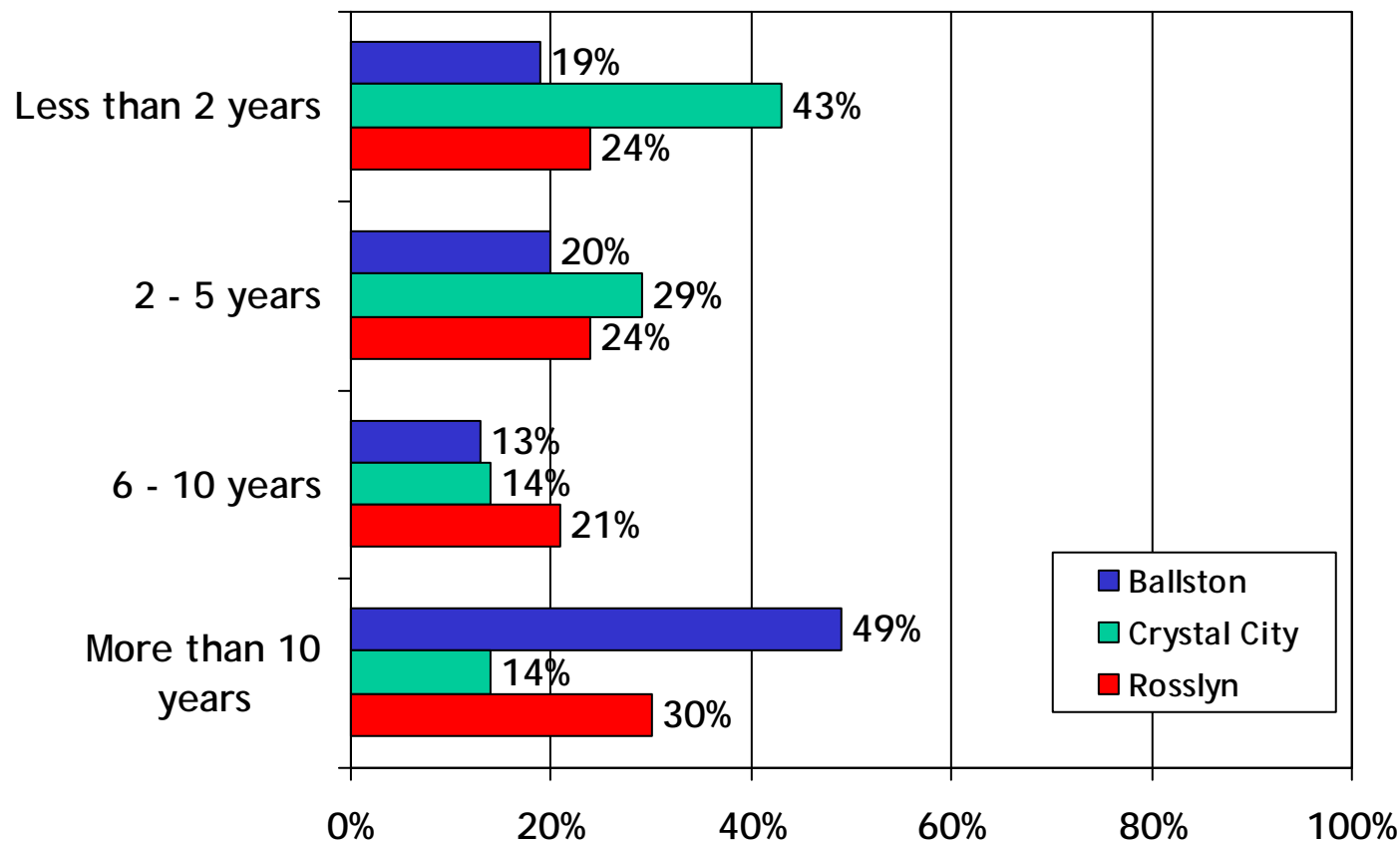
## Quantity by ZIP Code



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# Half of the Ballston Arlington Residents Have Lived There for More than 10 Years



**CAUTION  
SMALL SAMPLE  
SIZES**

Ballston  
n = 70  
Crystal City  
n = 7  
Rosslyn  
n = 33

Q21: How long have you lived in Arlington County?

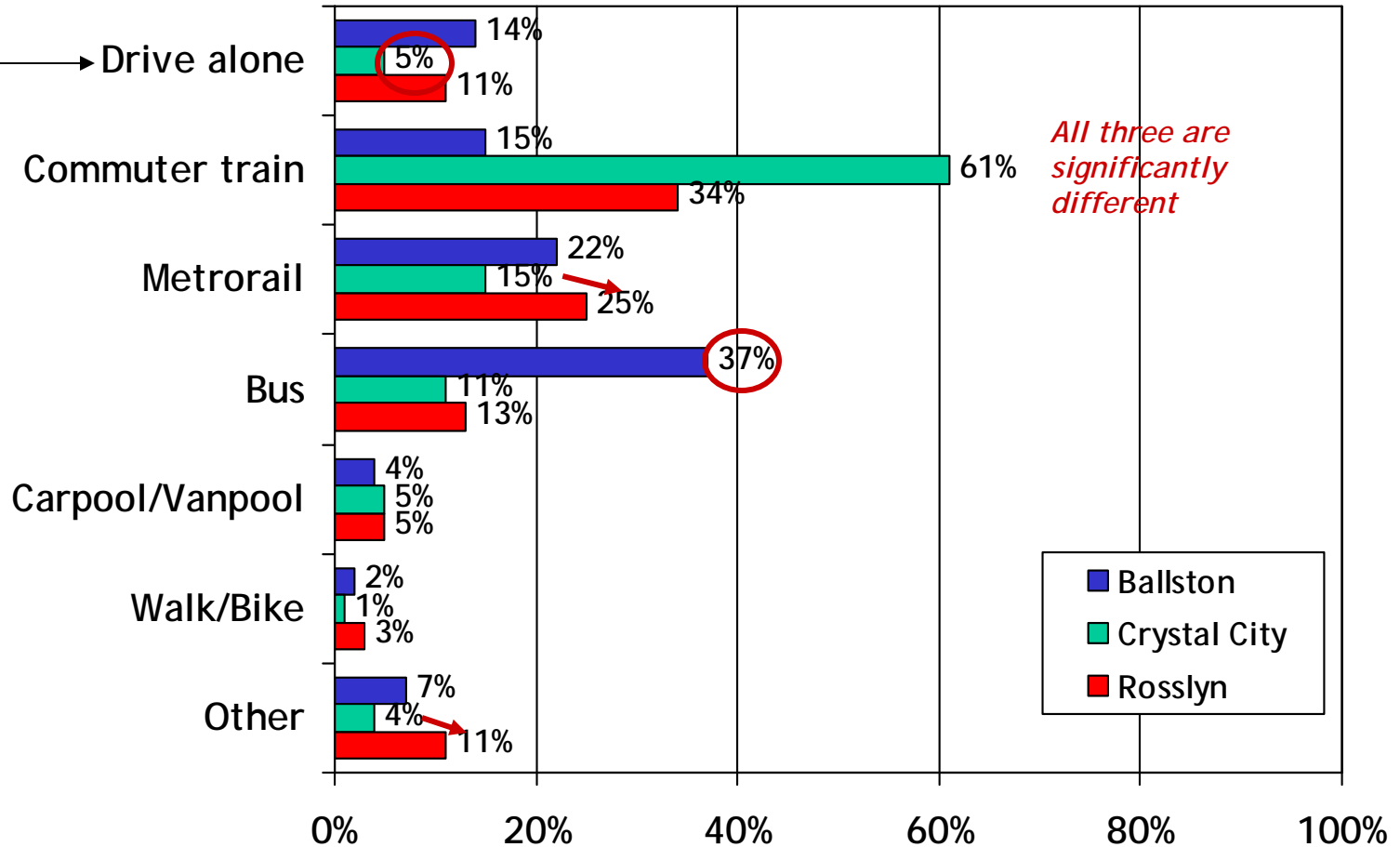
*How Do Commuter  
Store Patrons Commute?  
Self-reported Mode Use*

# Customers Are Overwhelmingly Transit Riders – Fewer than One in Eight Regularly Drive Alone

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

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

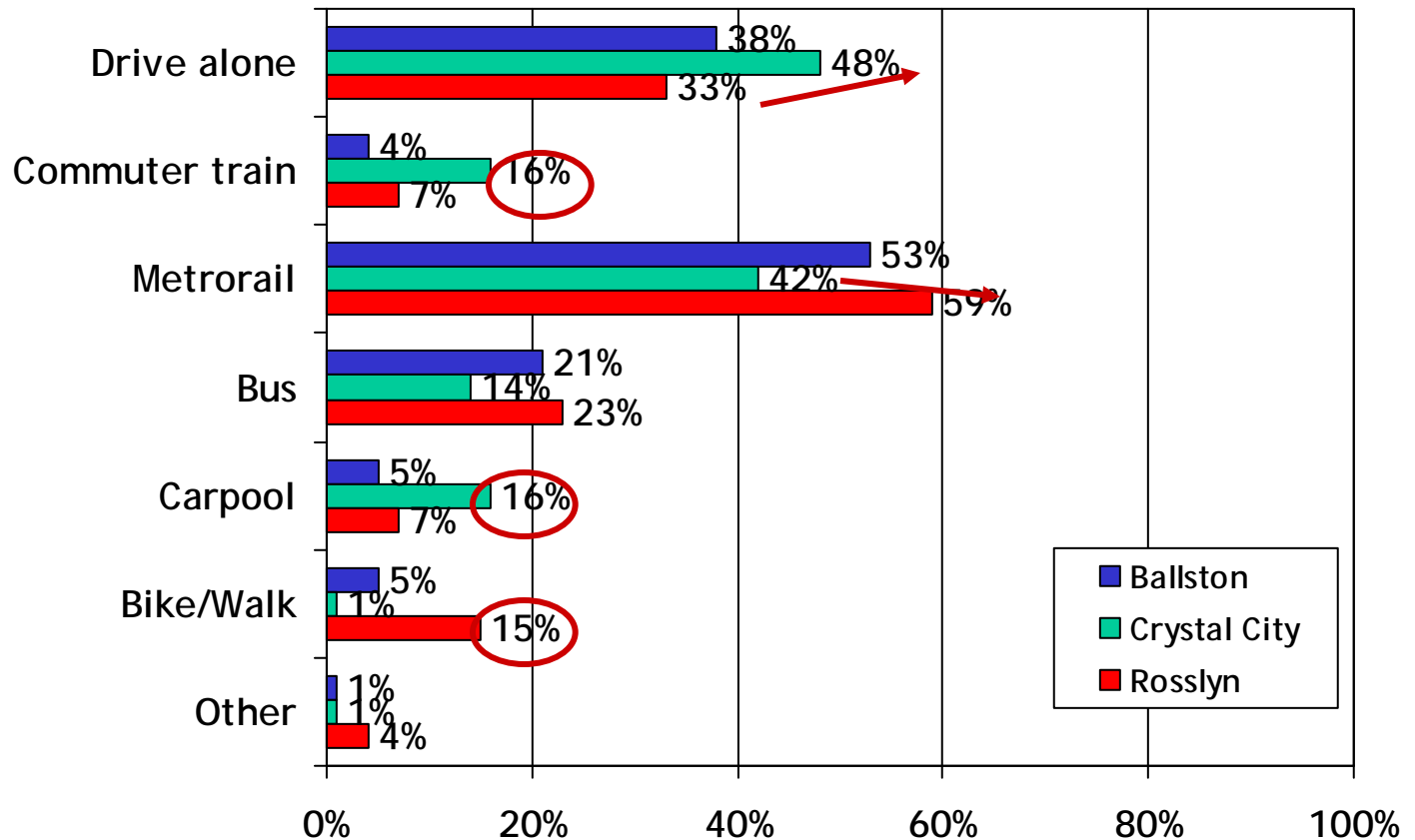
Ballston  
n = 130  
Crystal City  
n = 193  
Rosslyn  
n = 160



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

# But a Third to Almost Half Drive Alone as a Secondary Mode of Transportation

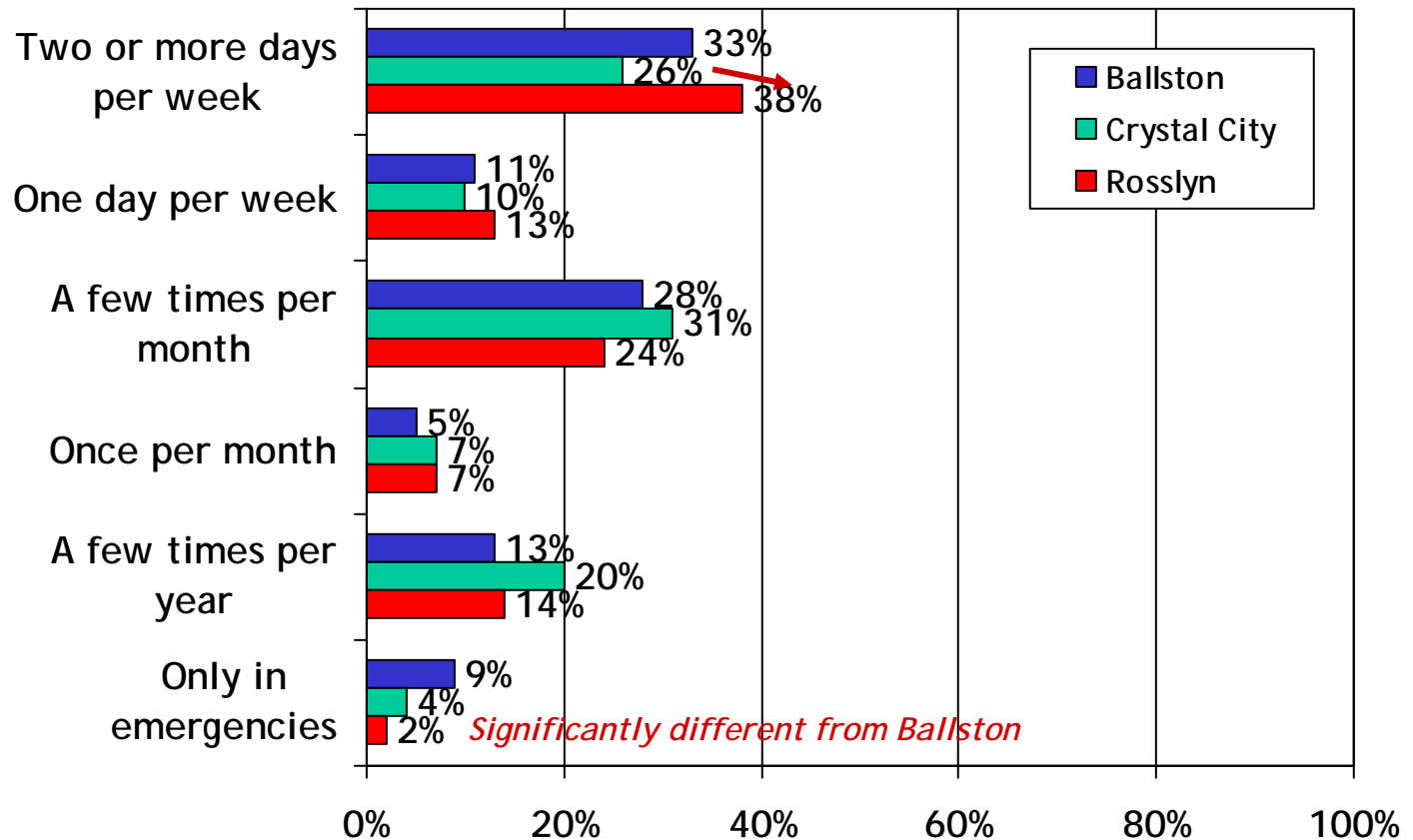
58% of Ballston Customers, 63% of Crystal City Customers, and 69% of Rosslyn Customers use secondary transportation



Q23A: Do you ever use another type of transportation to get to work, other than the one you just indicated?

Q23B: What other types of transportation do you use?

# Secondary Modes Are Generally Used Less than Once per Week



Note: "Other" not shown, 2% or less for all 3 Stores

Q23C: How often do you typically use any of these other types of transportation to get to work?

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

*How Engaged Are  
Commuter Store Patrons?  
Self-reported store visitation*

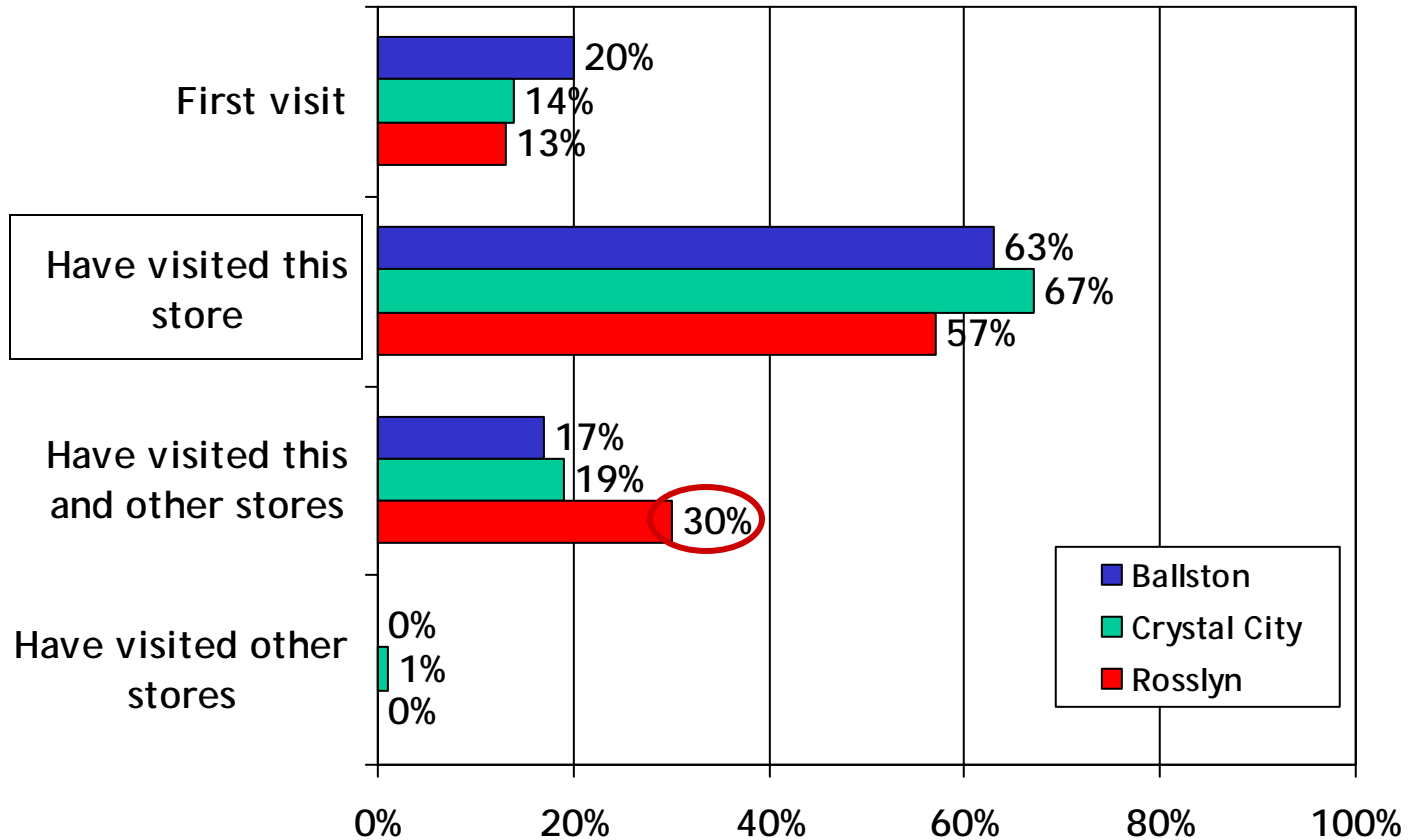
# Most Respondents Are Repeat Customers

## *And More Than Half Are Loyal to a Particular Store*

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

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

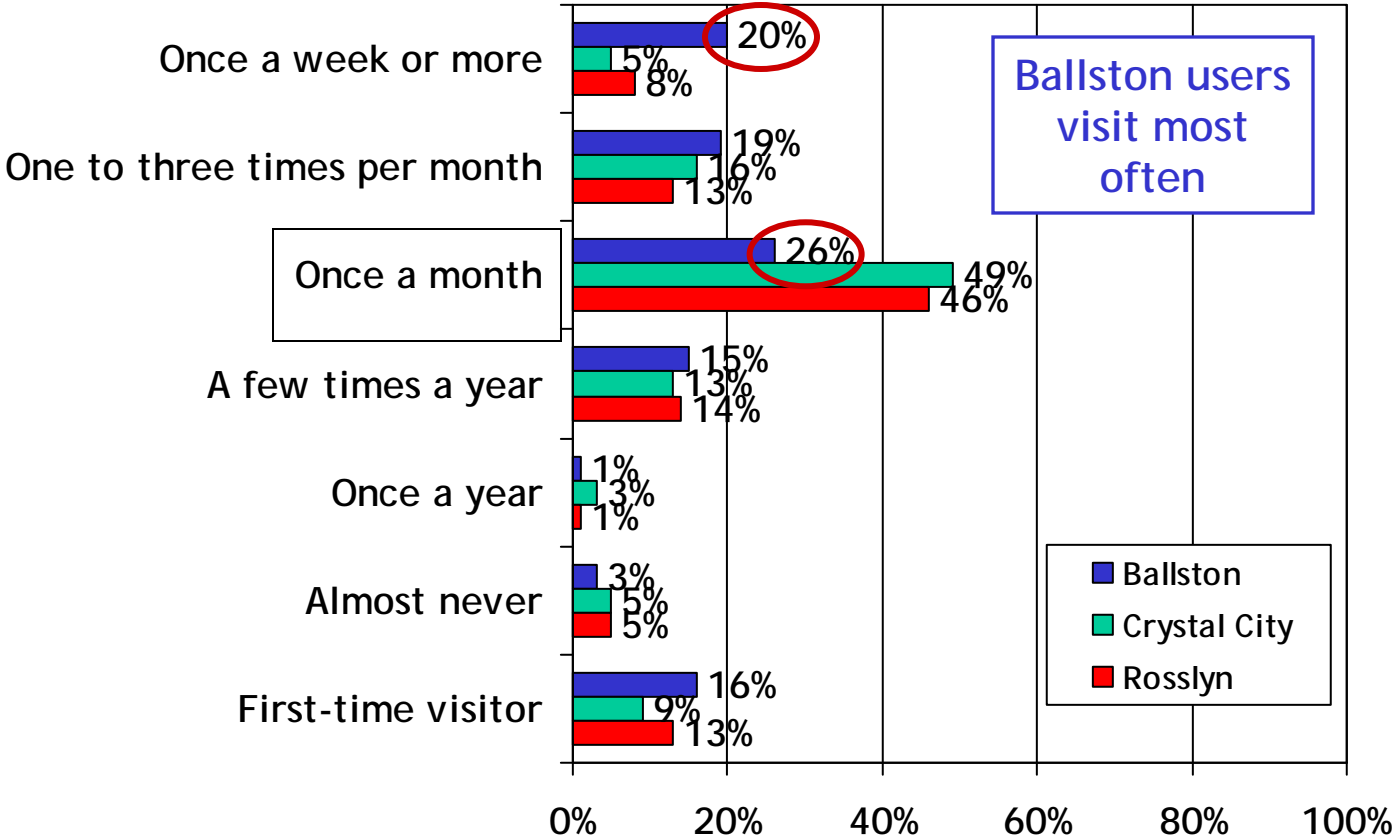
Those who purchased are more likely to have visited before (90% vs. 65%)



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

# Two-thirds Visit at Least Once a Month

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



Q9: How often do you visit this and/or any other Commuter Store in Arlington County (i.e., the Ballston, Rosslyn, Crystal City, and Mobile Commuter Stores)?

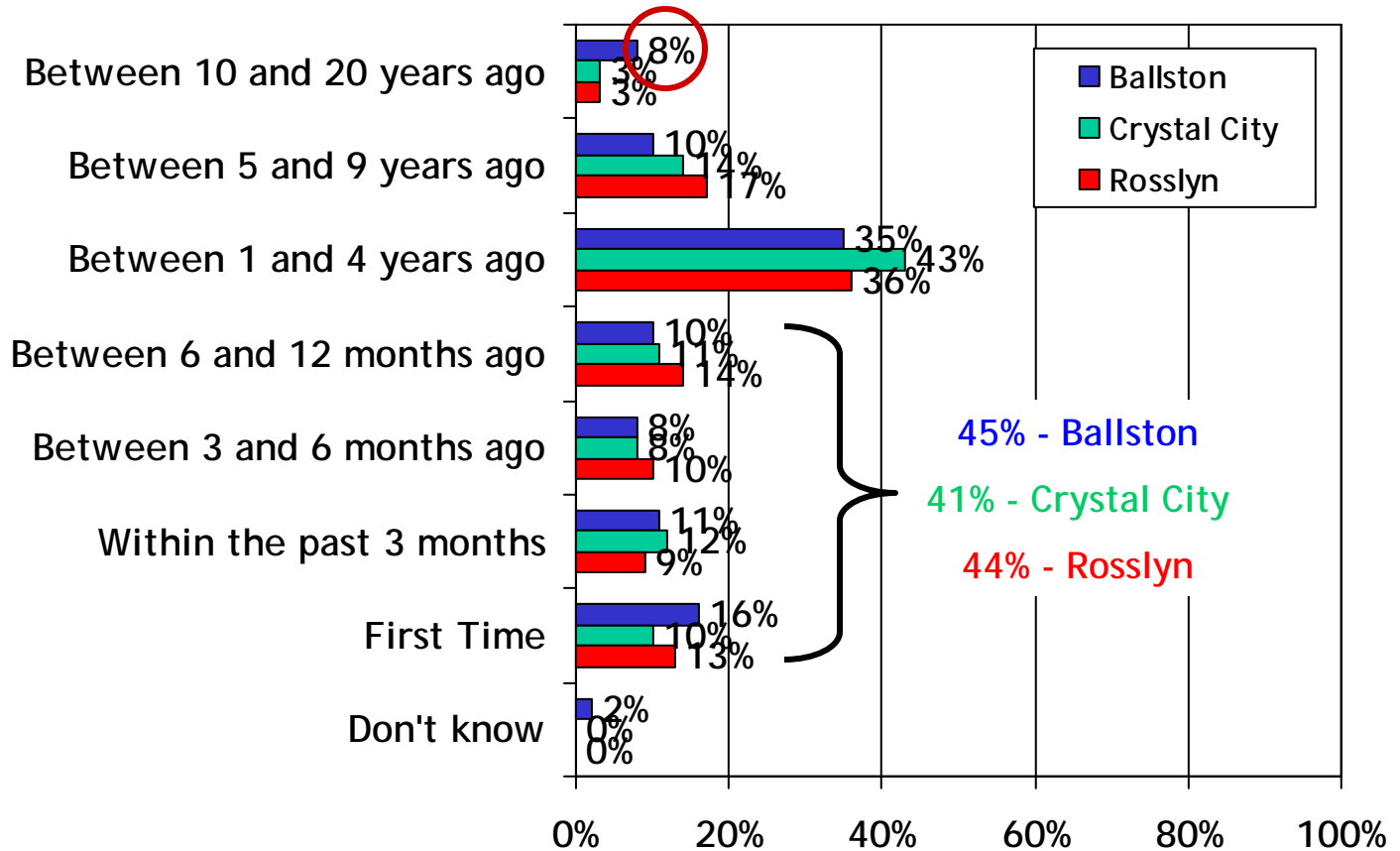


# 4 in 10 Customers Made Their First Visit Within the Last Year

The Ballston Store opened in June of 1989.

The Crystal City Store opened in May of 1992.

The Rosslyn Store Opened in December of 1994



Q10: When did you first visit The Commuter Store?

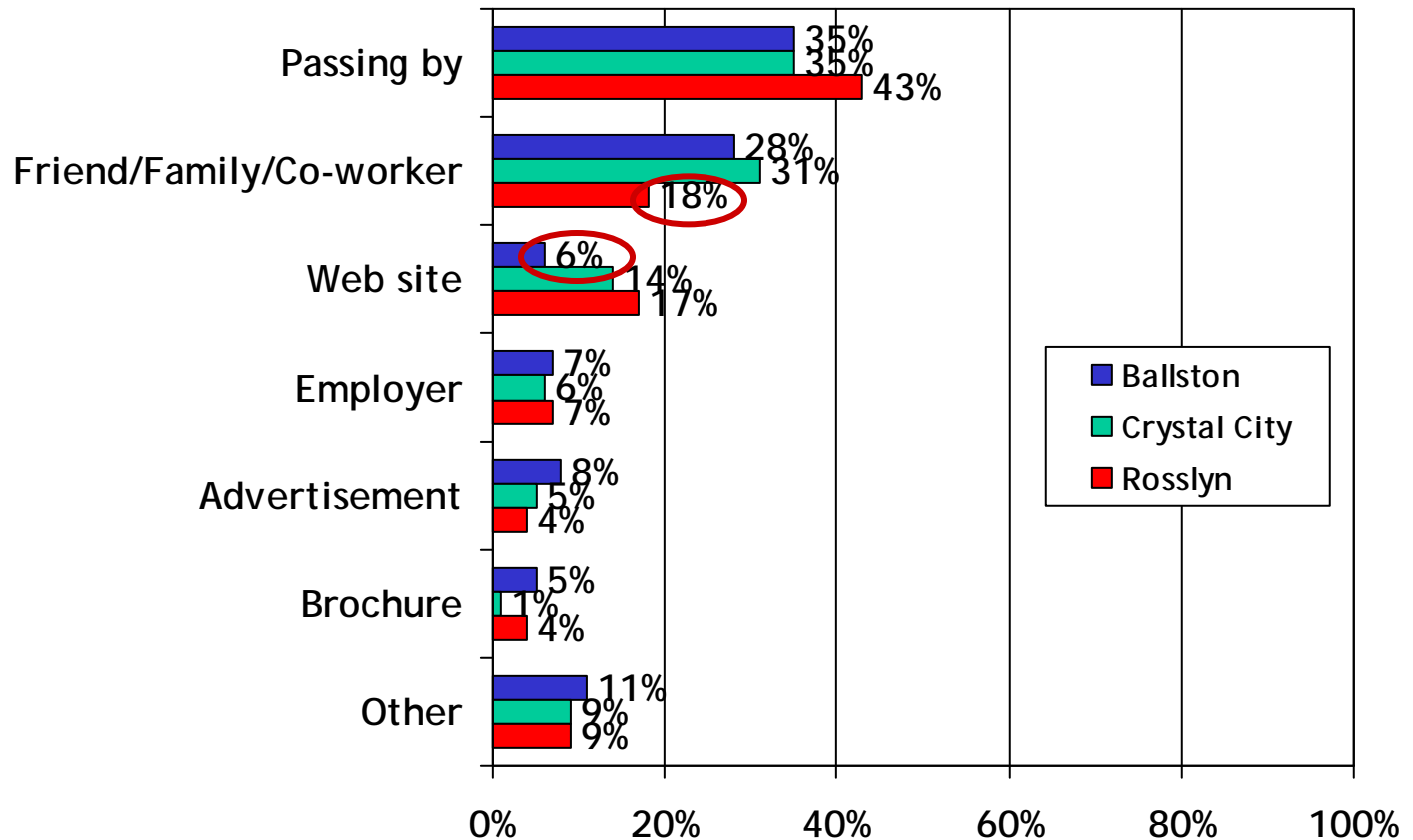
Ballston  
n = 144  
Crystal City  
n = 181  
Rosslyn  
n = 154

# Comparison of Demographics

	<u>Total</u>	<u>Ballston</u>	<u>Crystal City</u>	<u>Rosslyn</u>	<u>Existing Customers</u>	<u>First-time Customers</u>
% Male	60	53	63	63	62	42
% White	55	50	54	61	56	47
Mean Income	96	87	108	94	97	88
Mean Age	47	49	47	45	48	42
% Employed	88	67	95	86	89	84
% Live but don't work in AC	6	14	1	6	6	9
% Work but don't live in AC	50	32	68	43	51	42
% Live and work in AC	9	18	3	8	10	9
% Don't live or work in AC	35	35	28	42	34	40
% Typical Travel Mode - Drive Alone	9	14	5	11	8	23

# Initial Store Attraction

# The Majority Heard about the Stores Via "Passing by" or Referral

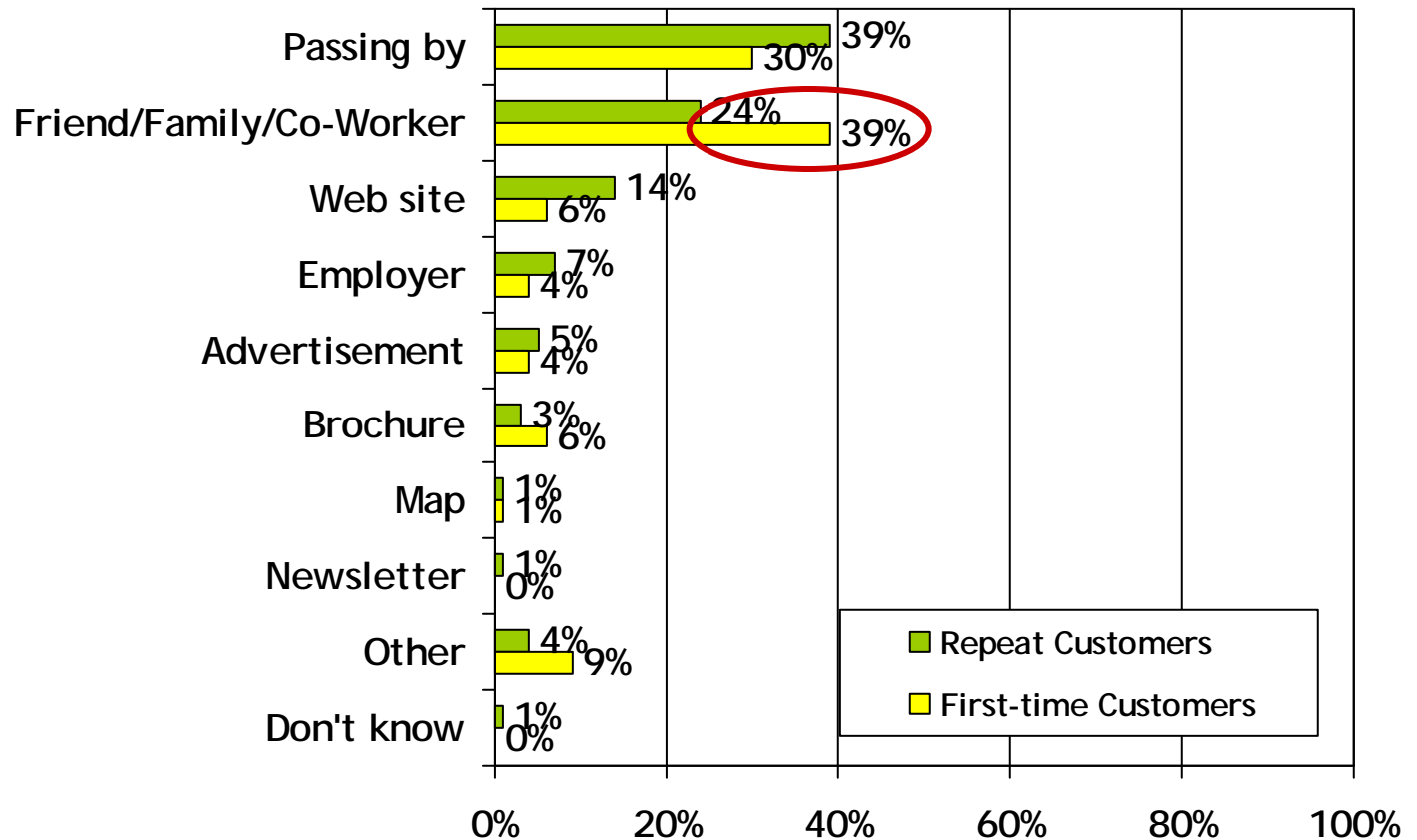


Females are more likely to hear about the Commuter Store from a referral and Males from passing by or a Web site.

Note: Map and newsletter not shown, named by 2% or fewer respondents at all stores

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

# First-time Customers More Likely to Have Been Referred than Repeat Customers

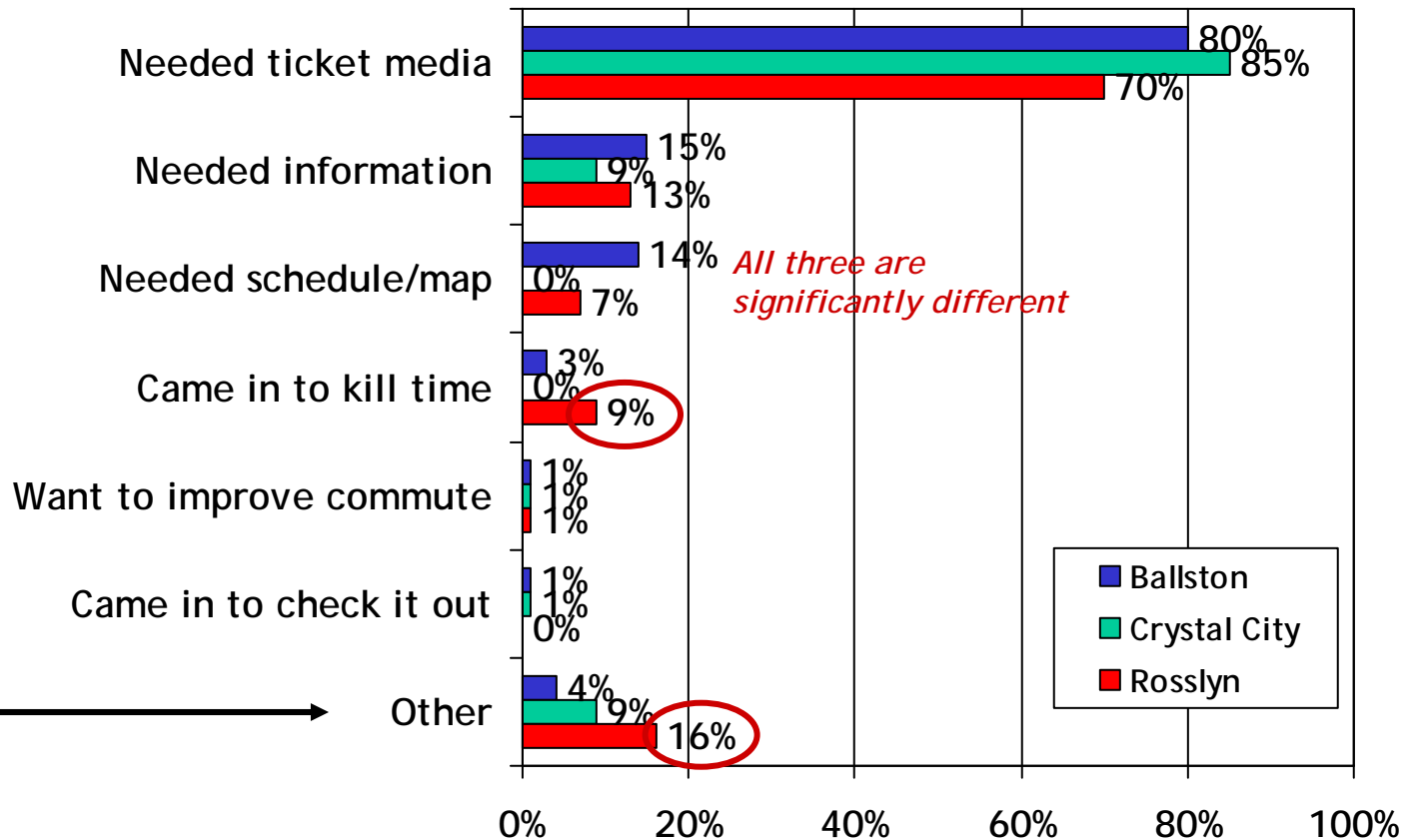


Q1: Where did you first hear about The Commuter Store?

# The Majority of Customers Go to the Commuter Store to Purchase Fares

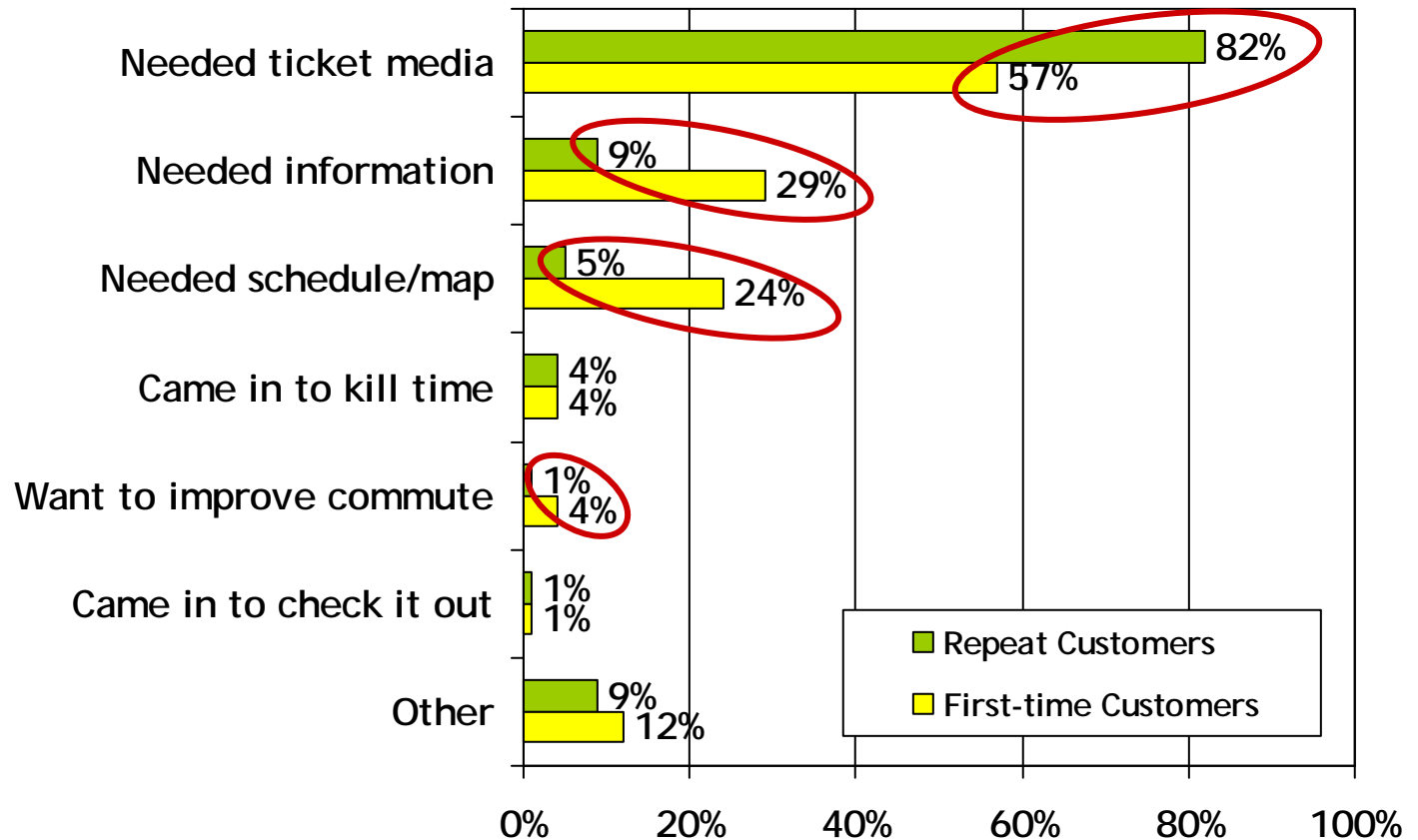
Generation Y is more likely than older generations to just be killing time (18% vs. 3%)

Of those who said "Other," 2 came for the "friendly staff," 7 were with or brought colleagues/friends, 3 came specifically for the survey.



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

# Not Surprisingly, Repeat Customers Were More Likely to Make a Purchase

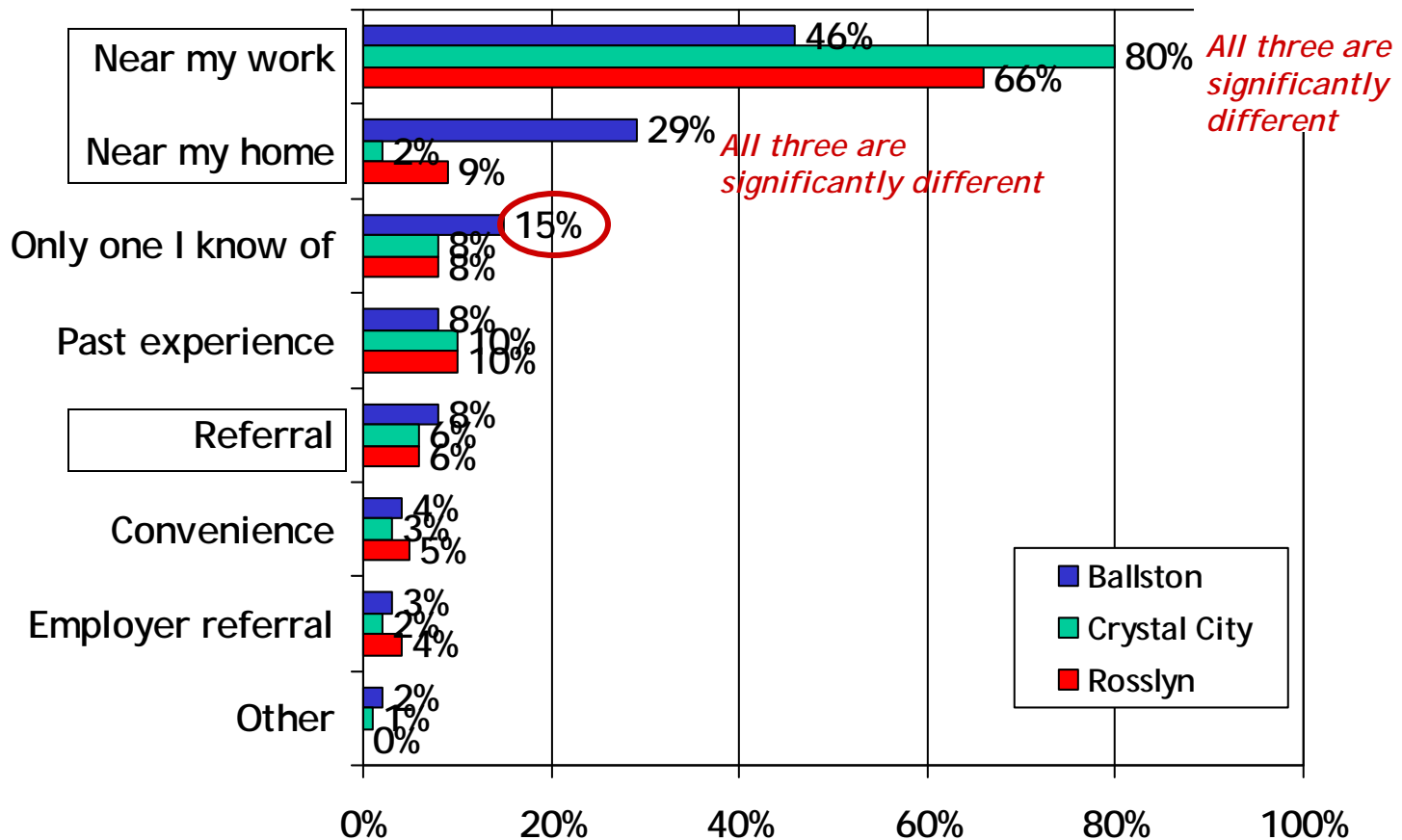


PQ1: Why did you come into The Commuter Store today?

# Most Choose Stores Based on Location and Convenience

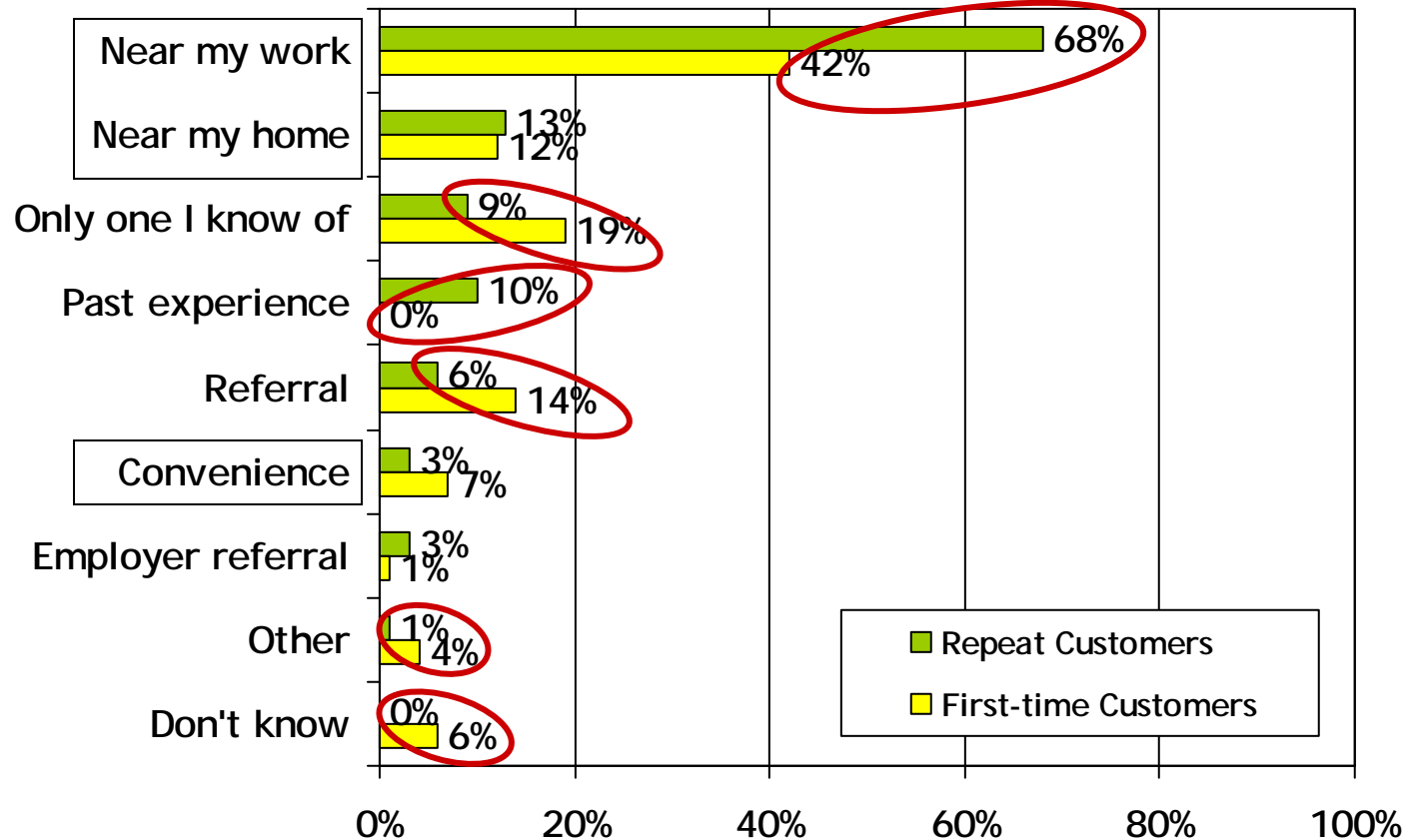
Females are more likely to chose which Store to visit based on a referral than males (12% vs. 3%).

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



Q2: What made you select this particular Store?

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



Q2: What made you select this particular Store?

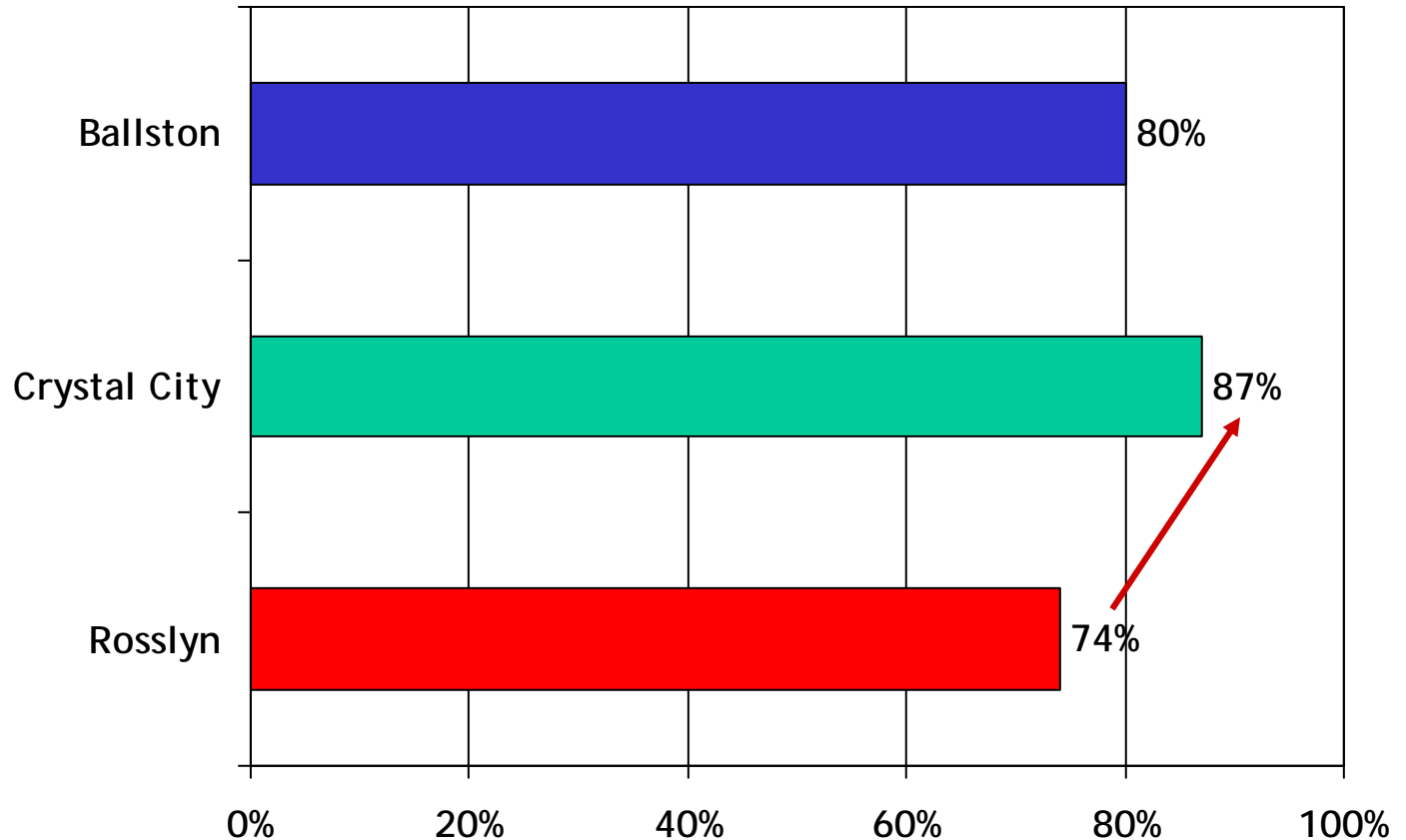
# Purchases & Information Sought

# More Than Three-quarters Who Visited the Stores Made a Purchase

Note: Some respondents purchased more than one type.

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

59% of First-time Customers made a purchase!



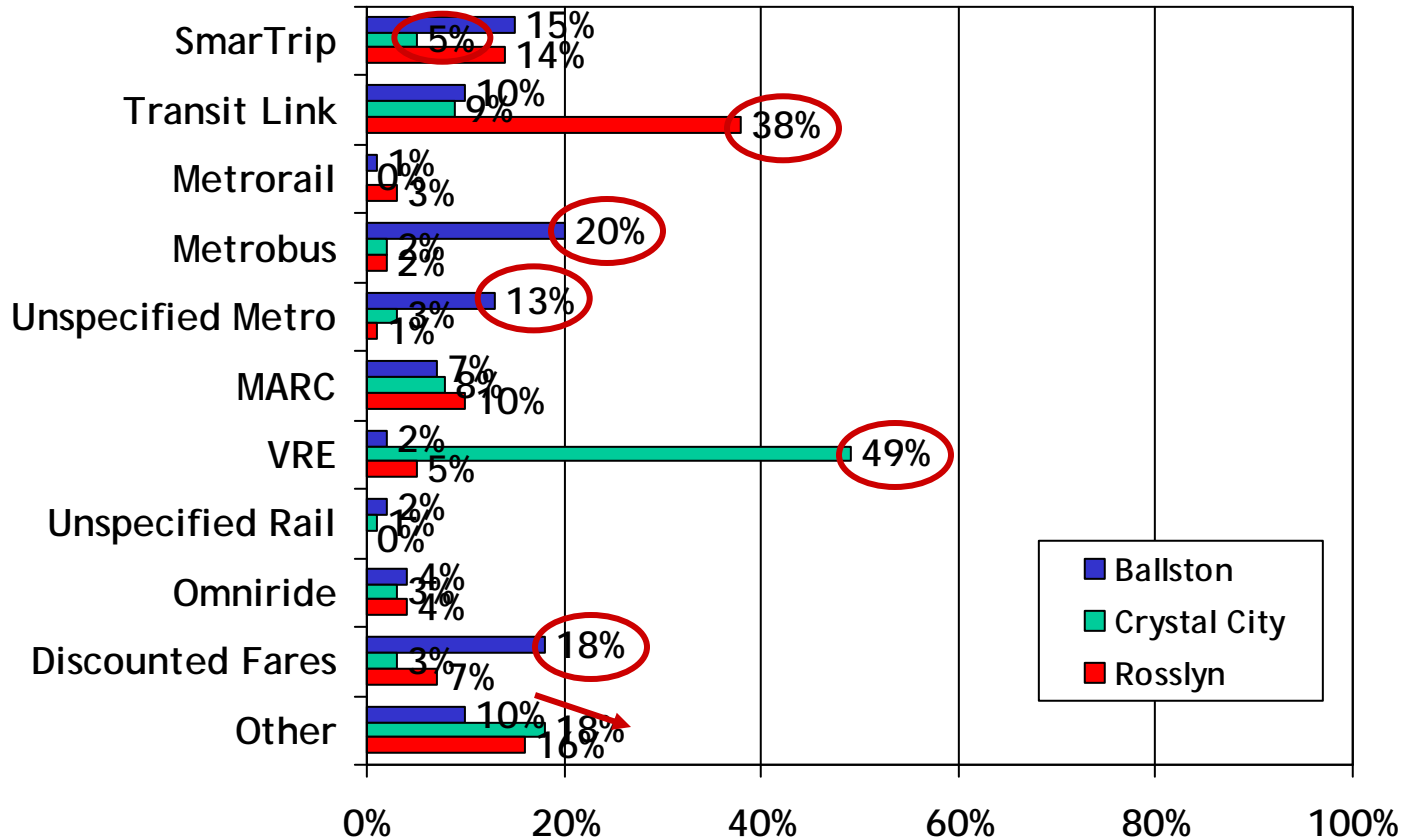
PQ2: Did you make a purchase?

# There are Several Differences Between Those Who Purchased and Those Who Did Not

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

# Purchases Vary By Store

*Rosslyn Customers Prefer TLC While Crystal City's Buy VRE*



Note: Some respondents purchased more than one type.

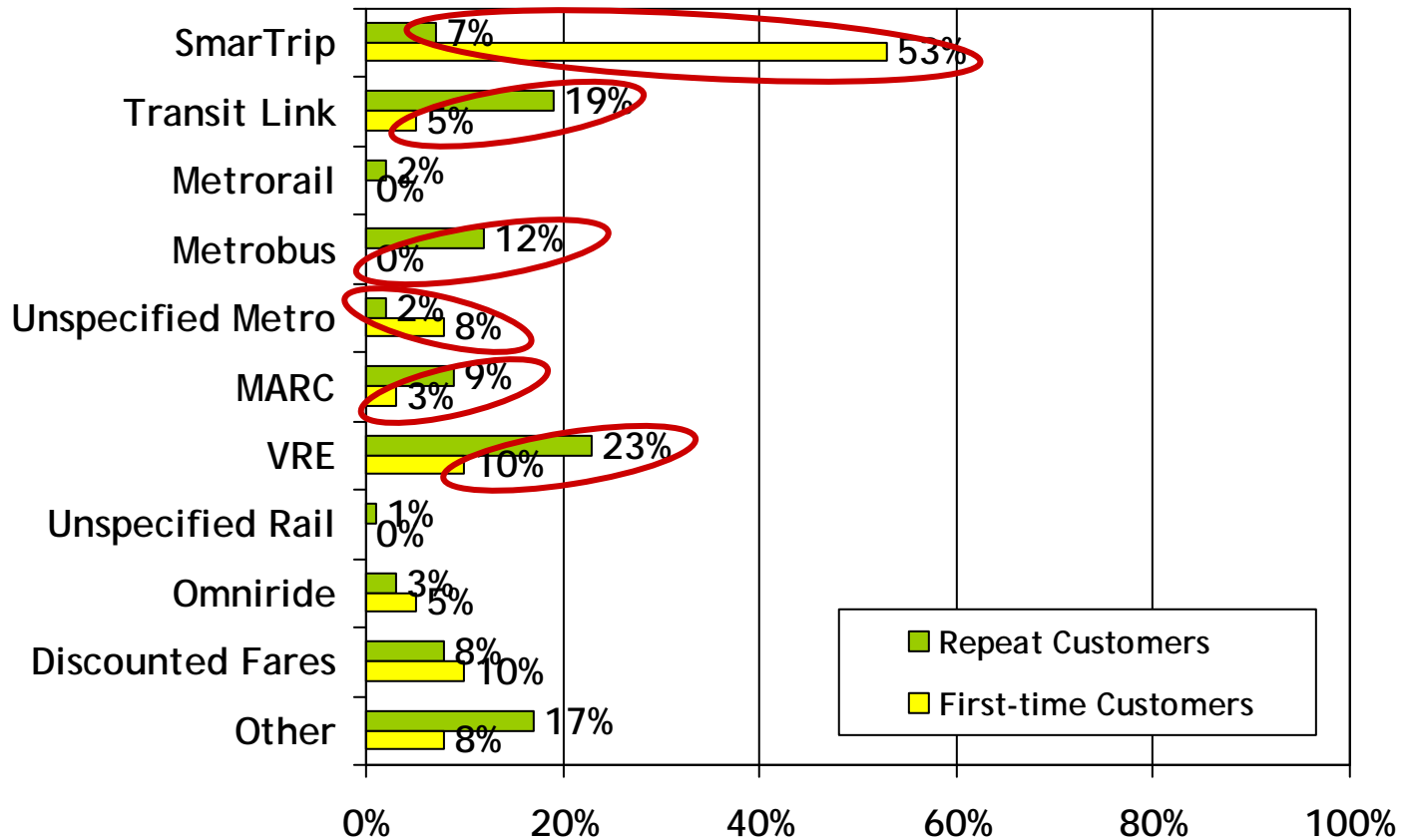
See appendix for breakdown of purchases

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

PQ2: Did you make a purchase?

# More Than Half of First-time Customers Bought a SmarTrip Card

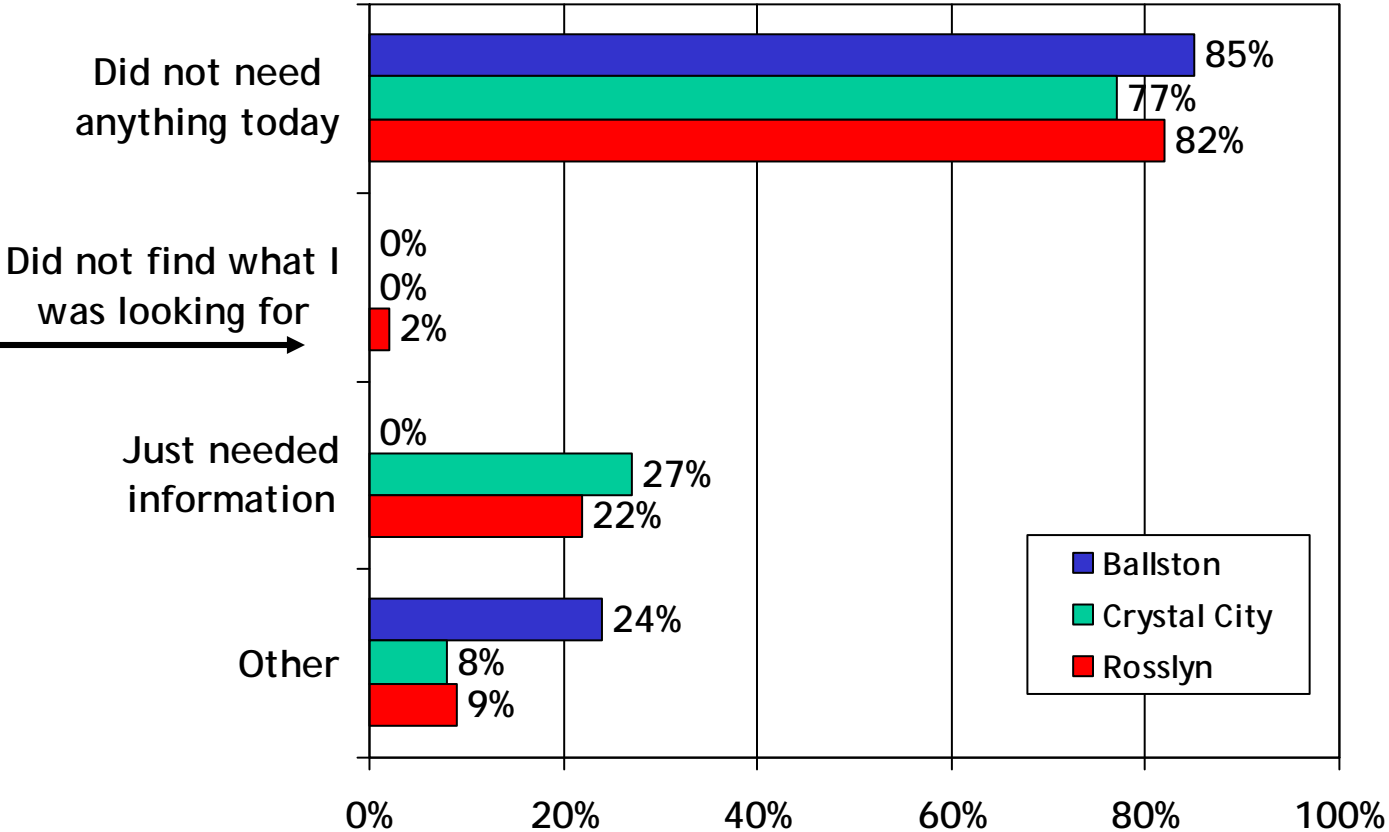
Note: Some respondents purchased more than one type.



PQ2: Did you make a purchase?

# Those Who Did Not Purchase Just Didn't Need Anything

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



Ballston  
n = 34  
Crystal City  
n = 26  
Rosslyn  
n = 45

PQ2A: Why did you not make a purchase?

# Other Reasons Why Customers Did Not Purchase

*"didn't use tokens for purpose intended, needed to return them." - Rosslyn*

*"Replacement pouch for SmartCard. They are free." - Rosslyn*

*"Exchanged dead fare card." - Ballston*

*"Not ready yet." - Ballston*

*"Checking things out, comparing fare card options." - Ballston*

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

*"Could not exchange Metro checks to a Smart card." - Crystal City*

PQ2A: Why did you not make a purchase?

# Rosslyn Customer Comments

What They Were Looking For But Could Not Find

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

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

*“No. The staff is excellent.”*

*“VRE pocket timetable”*

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

*“Bike map not available”*

PQ4: Was there anything you were looking for that you did not find?

# Ballston Customer Comments

## What They Were Looking For But Could Not Find

*"Wanted brochure to go to Ocean City, MD (couldn't find it)"*

*"A better Metro system map than the one displayed at the store or divide it up & magnify it to view street names clearer. The one in the store is too fuzzy looking." (First-time Visitor)*

*"Step up ticket" (First-time Visitor)*

*"Info on Mt. Vernon, brochures"*

*"Out of week-after-next bus pass"*

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

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

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

*"I wish the ART 67 brochure had scheduled pickup times."*

PQ4: Was there anything you were looking for that you did not find?

# Crystal City Customer Comments

## What They Were Looking For But Could Not Find

*"Did not find commuter schedules for buses that come from Waldorf."*

*"Did not find bus schedules. Out of schedules." (First-time Visitor)*

*"Looking for Amtrak info - local routes."*

*"Couldn't find connection."*

*"Bought card here. Can't fix problem here."*

*"Cannot complete transaction in store."*

*"No flyer for Omni ride at Rippon Landing & great staff!"*

*"Would be nice to have a store in Pentagon City."*

*"Out of pamphlets for Transit link cards."*

*"Could not transfer Metro fare onto commuter card. Still need to go to Metro station to complete transaction."*

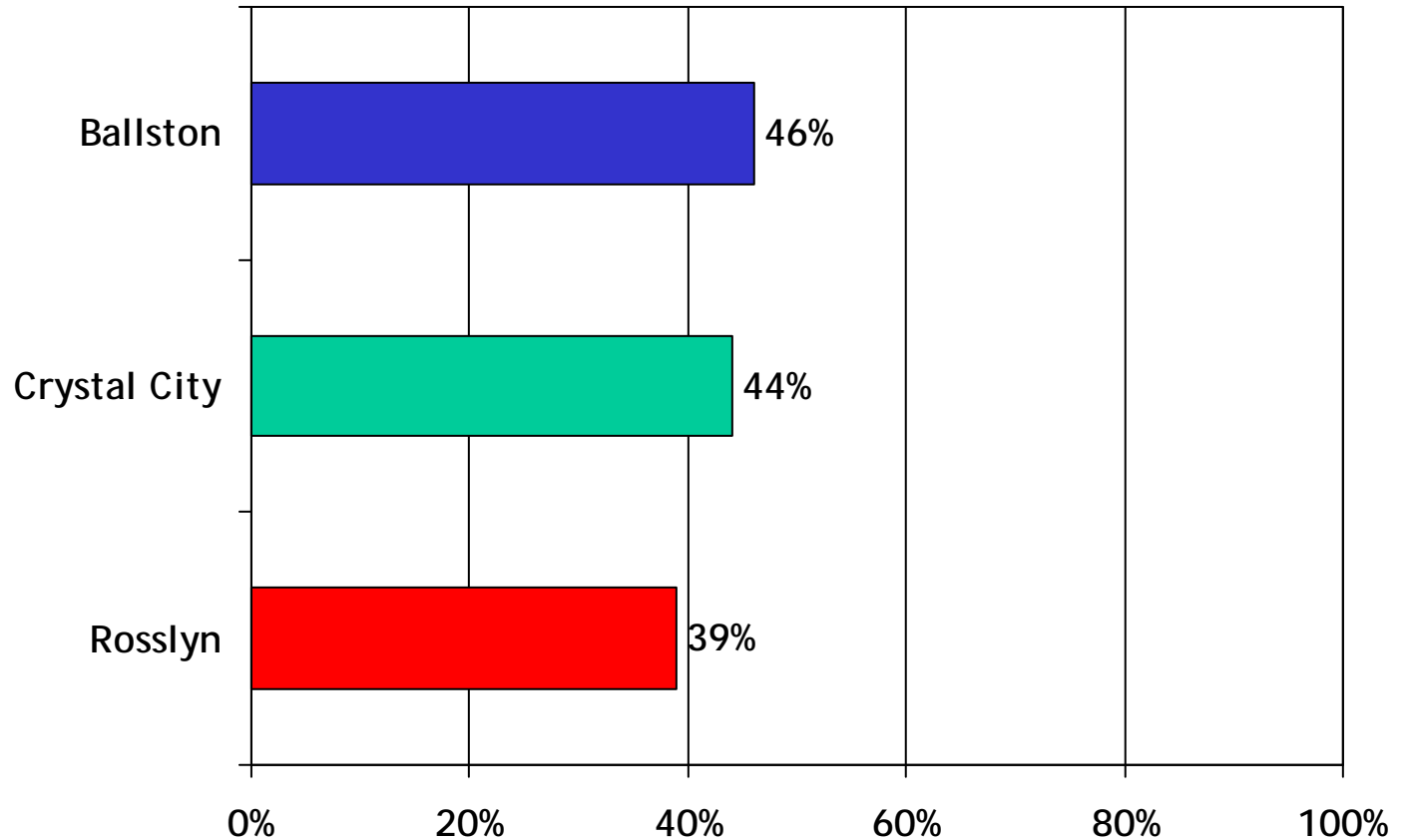
*"Didn't know location in Crystal City."*

*"New Omni link schedule"*

*"Fairfax Connector 597 schedule"*

*"Closed Fredericksburg store - I used to go there."*

# Almost Half Took Information



Q13: Did you pick up a free schedule or brochure?

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

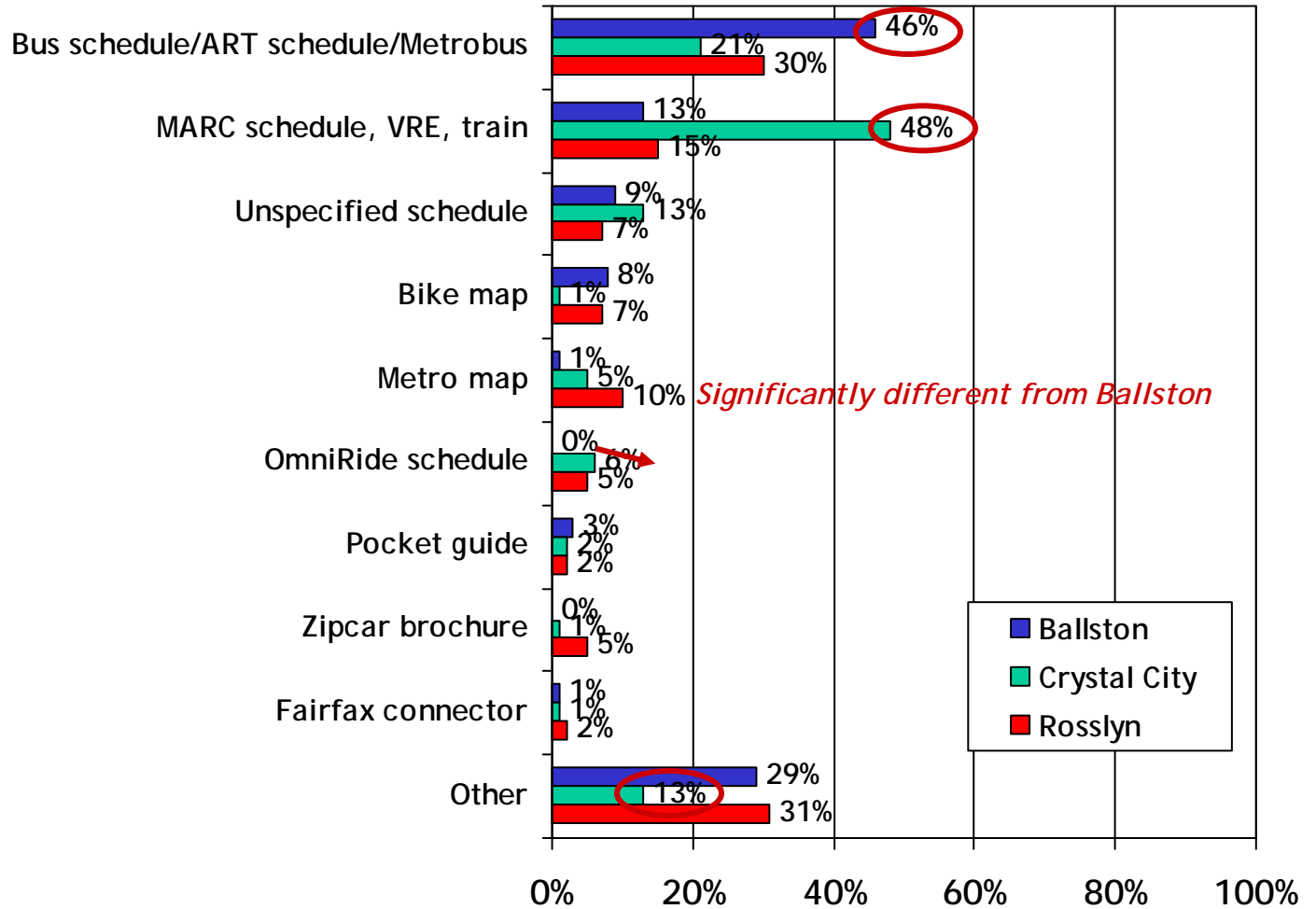
50% of females versus 39% of males picked up a schedule.

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

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

# Collateral Needed Differs By Store

Note: Some respondents gave multiple responses.

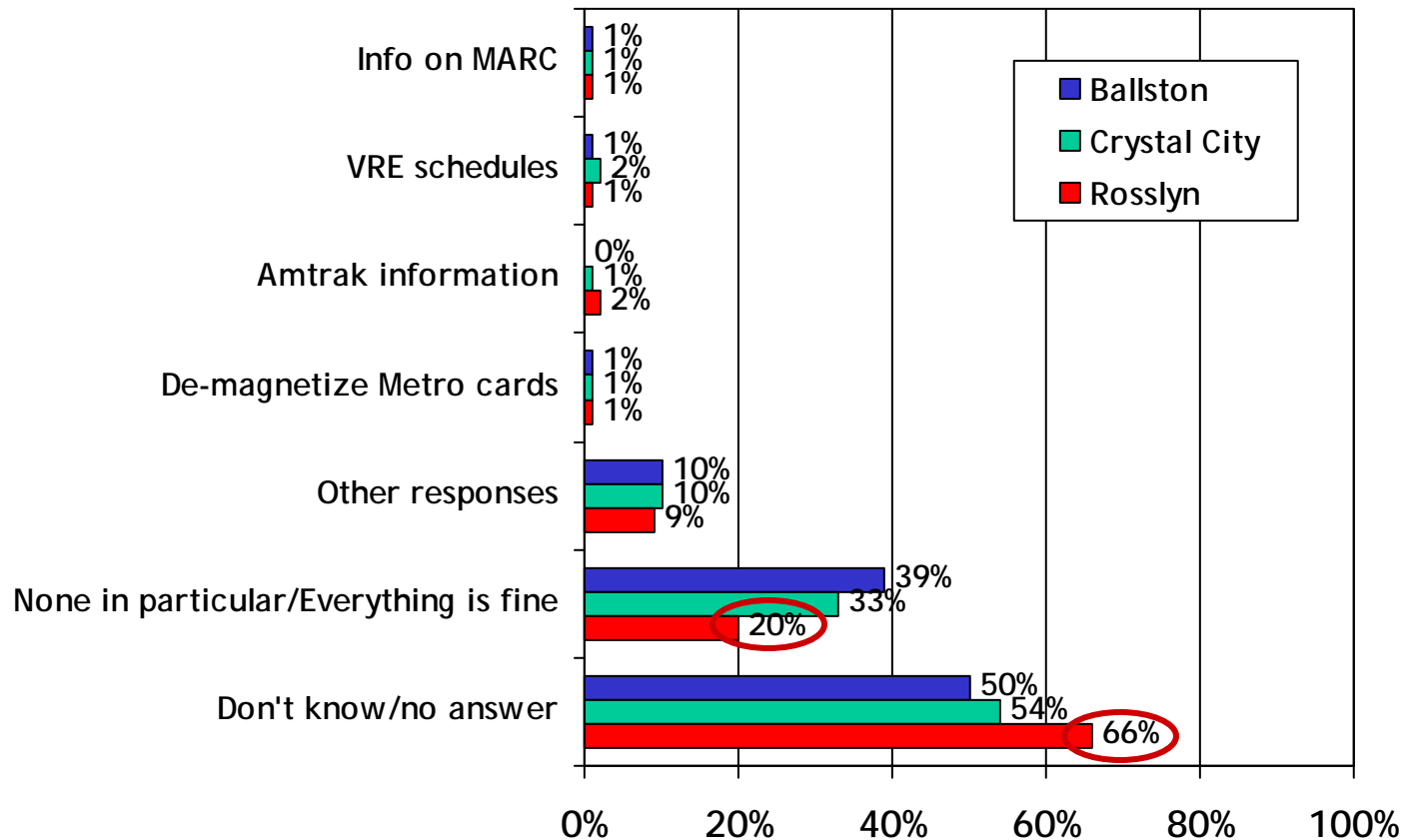


Ballston  
n = 76  
Crystal City  
n = 85  
Rosslyn  
n = 61

Q13A: What did you pick up?

# Most Find What They Need at the Commuter Store

Note: Some respondents gave multiple responses.



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

Ballston  
n = 91  
Crystal City  
n = 99  
Rosslyn  
n = 65

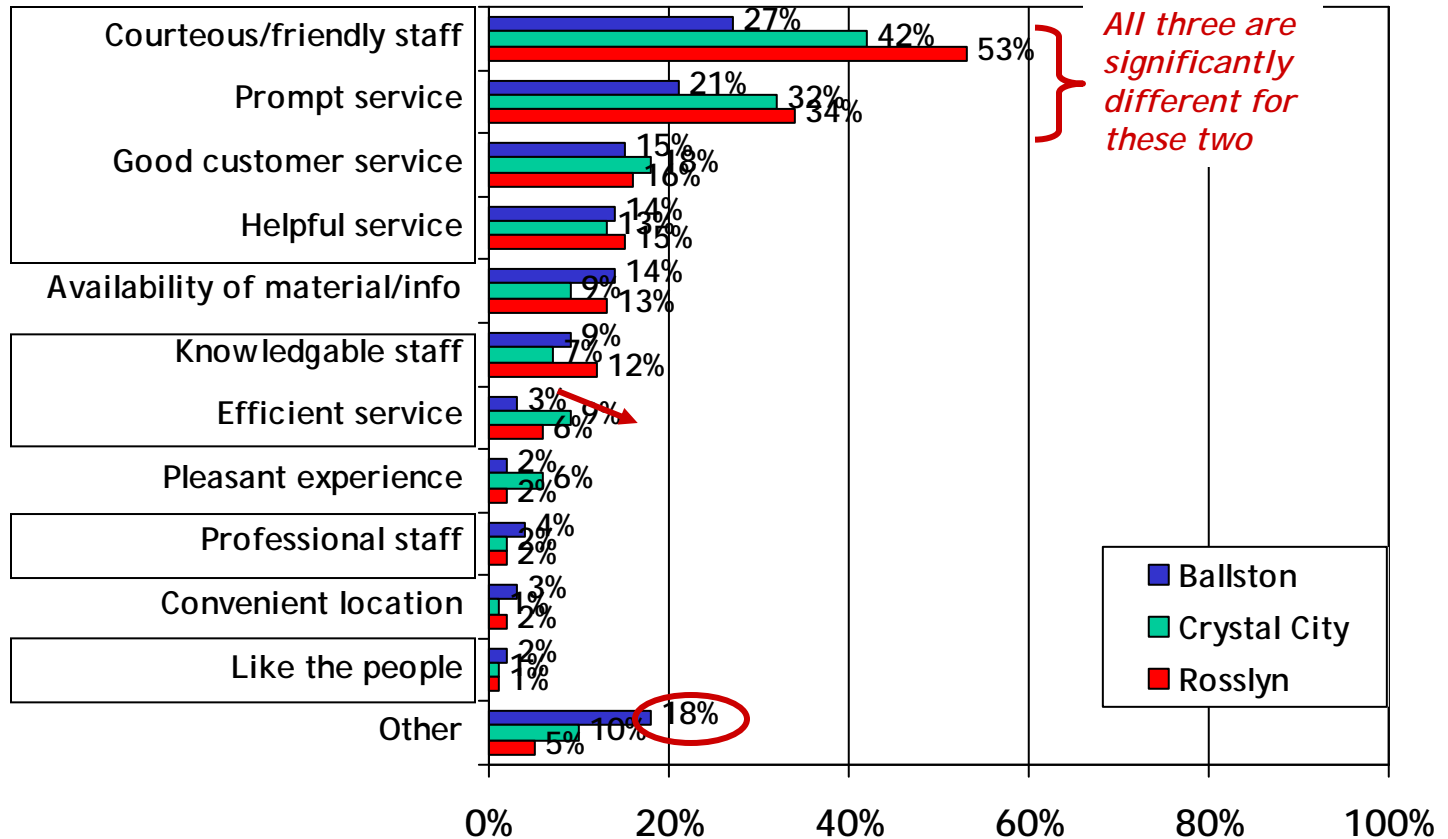
# Customer Experience

# The Store Staff Is an Important Part of Customer Experience

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

Note: Some respondents gave multiple responses.

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



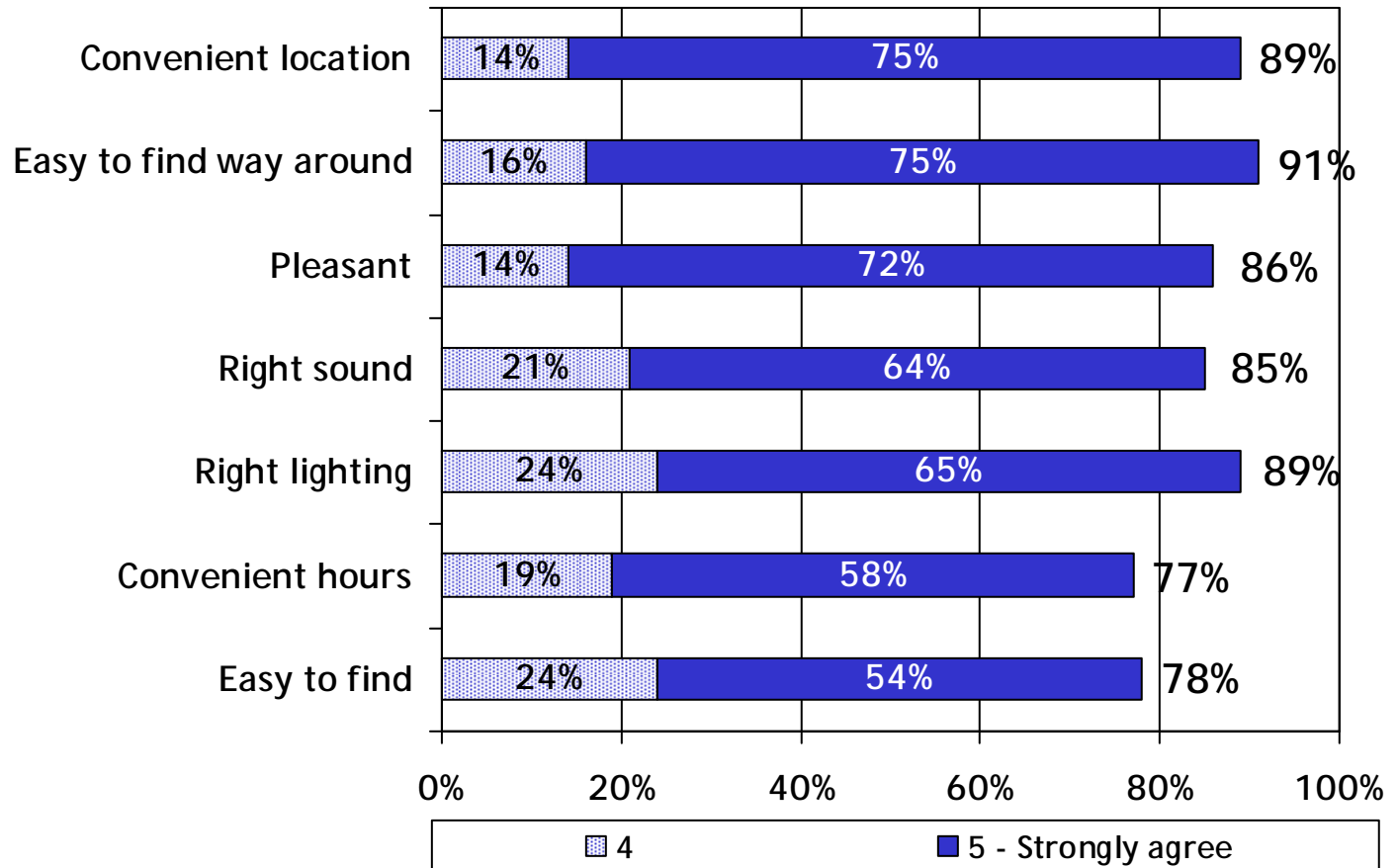
Q4: Why did you give that rating -n Q3 ? (open end)

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



# Most Ballston Customers Gave High Ratings to Store Attributes

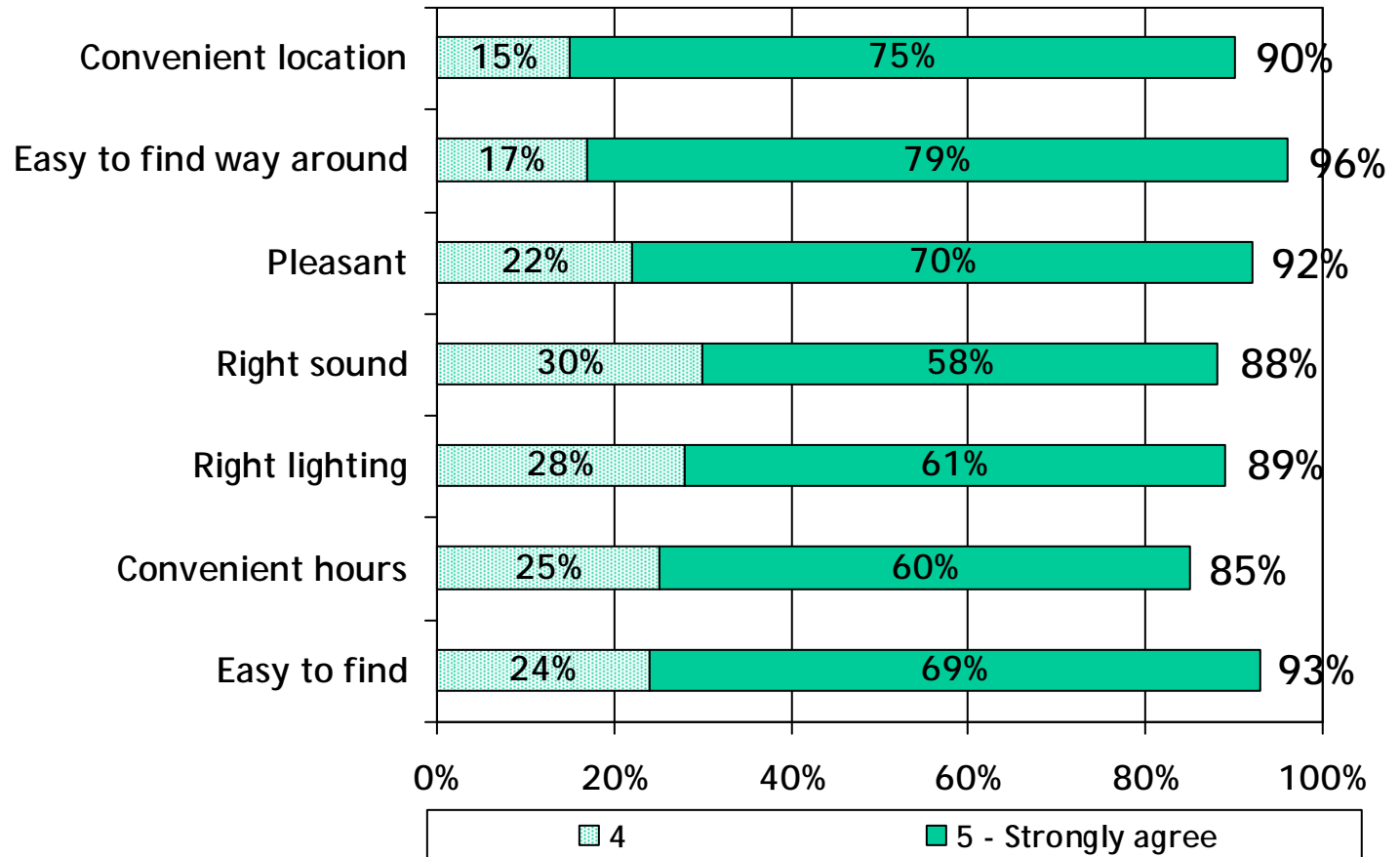
Lower ratings for “convenient hours” and “easy to find”



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

# Most Crystal City Customers Gave High Ratings to Store Attributes

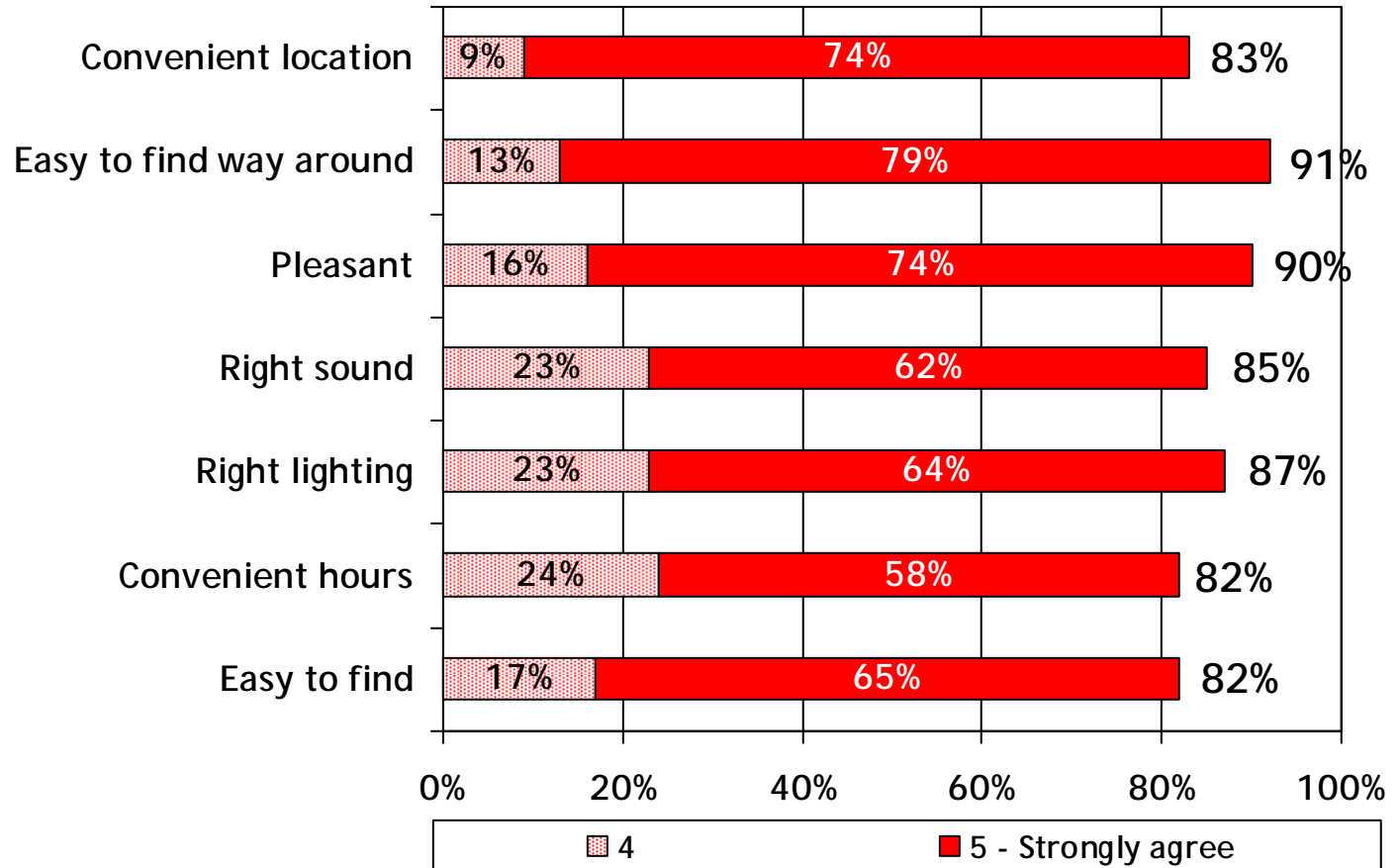
Slightly lower ratings for “convenient hours”



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

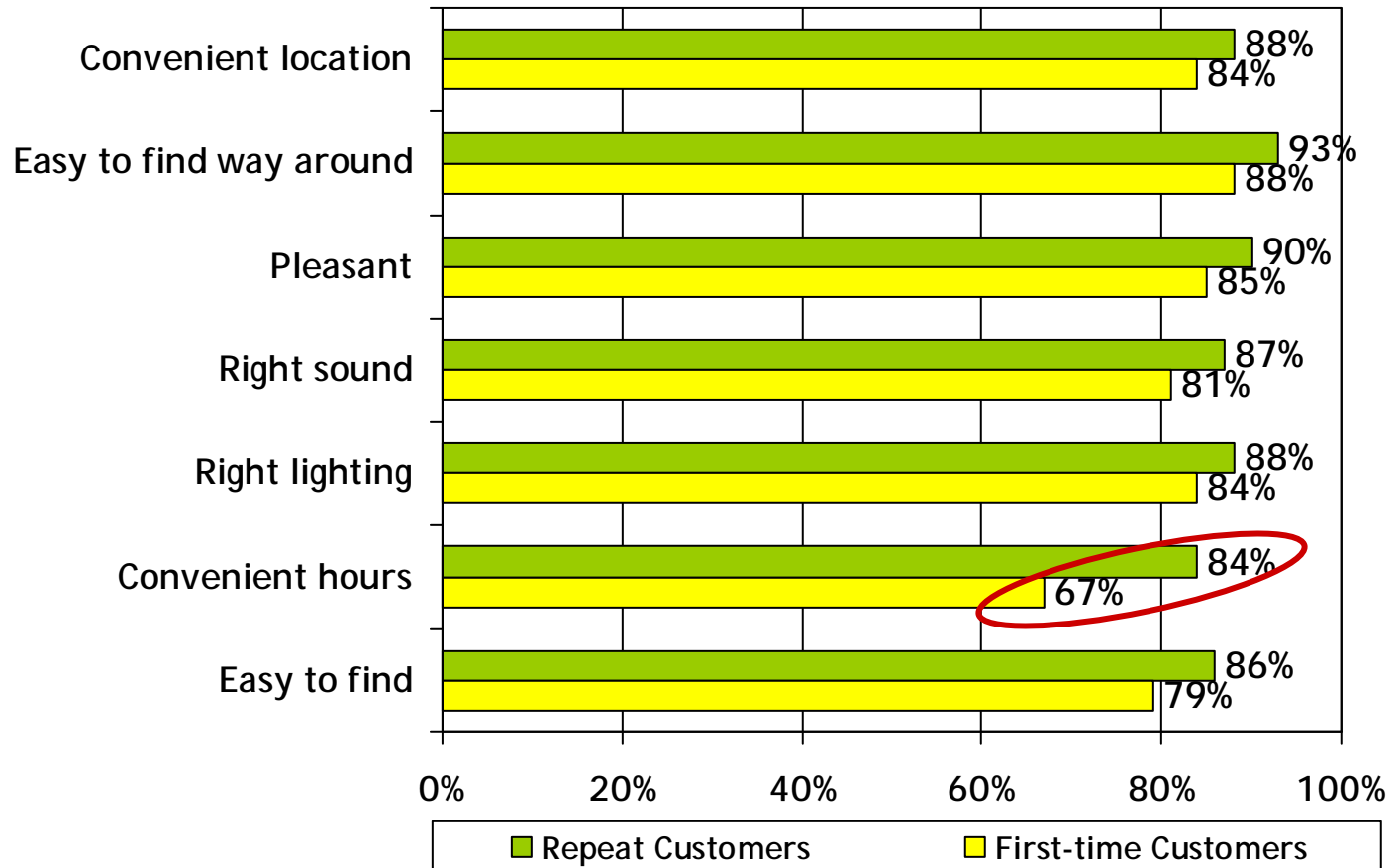
# Most Rosslyn Customers Gave High Ratings to Store Attributes

Slightly lower ratings for "convenient location," "convenient hours," and "easy to find"



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

# Repeat Customers Have Found Ways to Make the Store Hours Work for Them



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

# A Few Might Have Misunderstood the Ratings as Comments Did Not Match

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

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

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

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

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

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

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

Q12: You rated \_\_\_\_\_ a [1 or 2], why did you give that rating?

# But a Few Did Have Negative Comments about the Store

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

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

*"Lighting is poor." - Ballston*

*"Woman is consistently rude." - Rosslyn*

*"Not enough staff." - Ballston*

*"Impersonal. Location noisy. Lights too low for reading schedules." - Rosslyn*

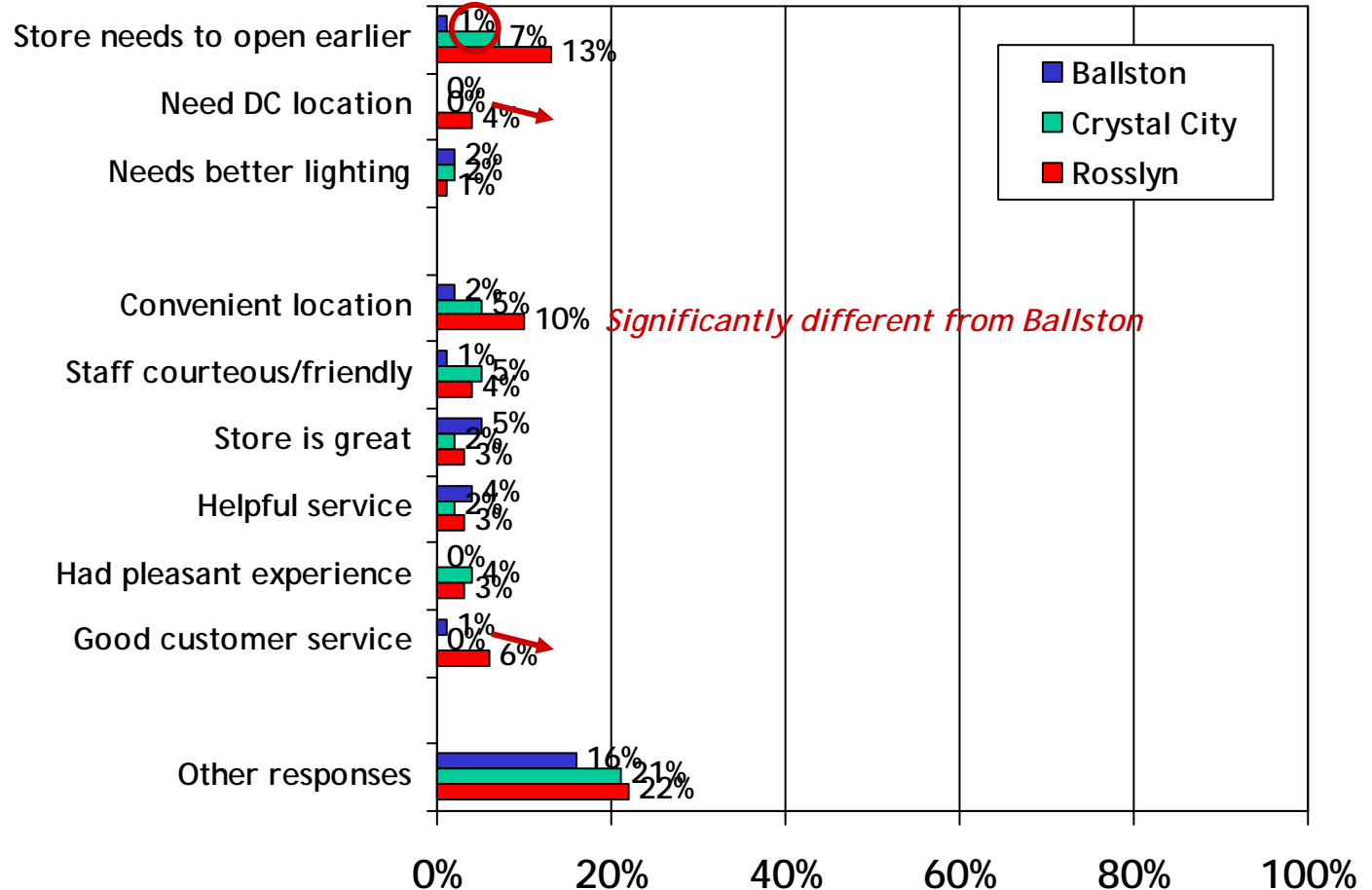
*"Lot of background noise from monitors." - Crystal City*

*"A lot of outside noise filters in while I was talking to the staff. I had to ask them repeat their answer." - Crystal City*

*"Needs to be brighter, hard to read some material." - Crystal City*

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

# Most Did Not Have Comments On Their Ratings



68% of Ballston, 56% of Crystal City, and 35% of Rosslyn customers did not have comments to make on their ratings.

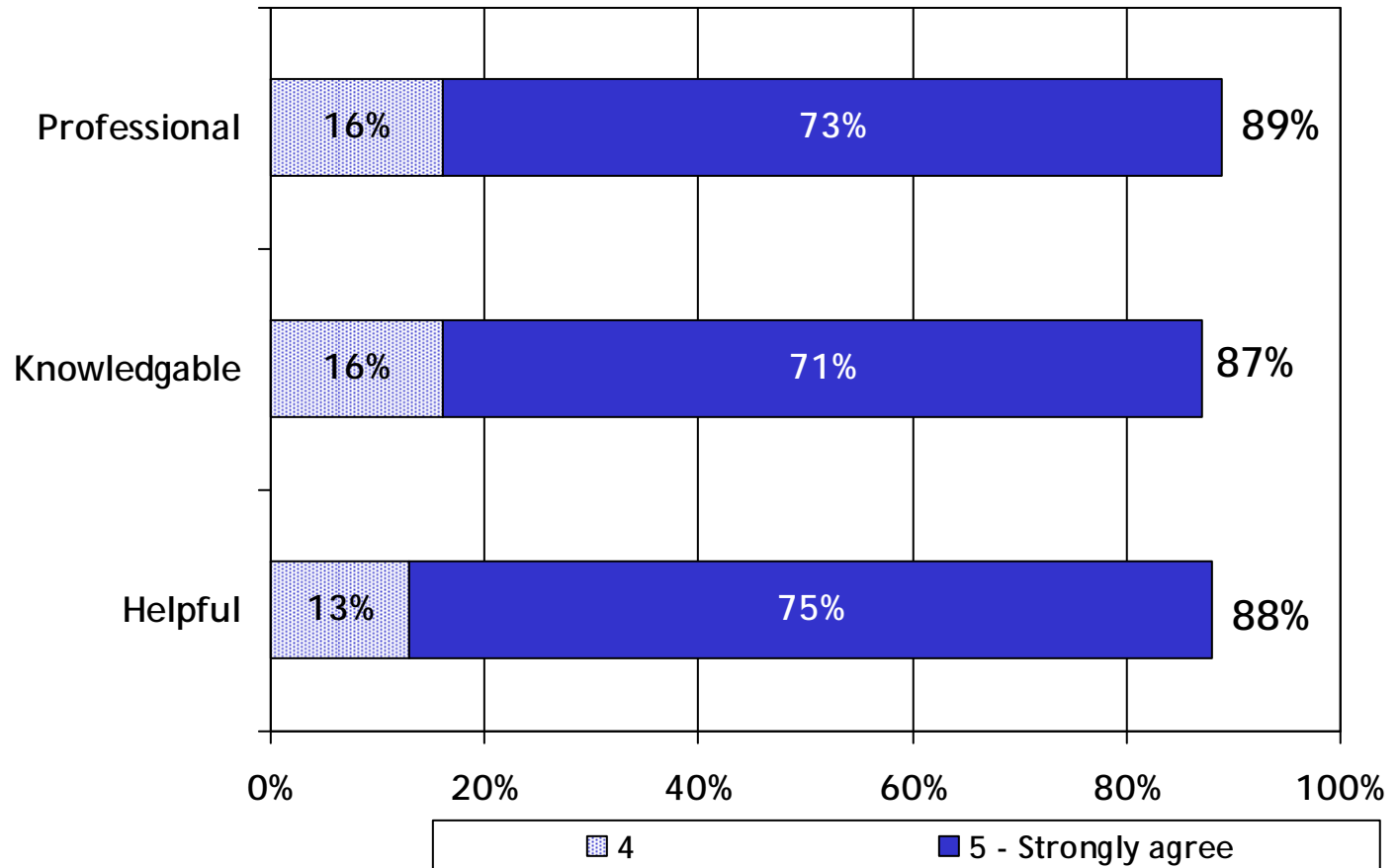
Note: Some respondents gave multiple responses.

Ballston  
n = 85  
Crystal City  
n = 98  
Rosslyn  
n = 69

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

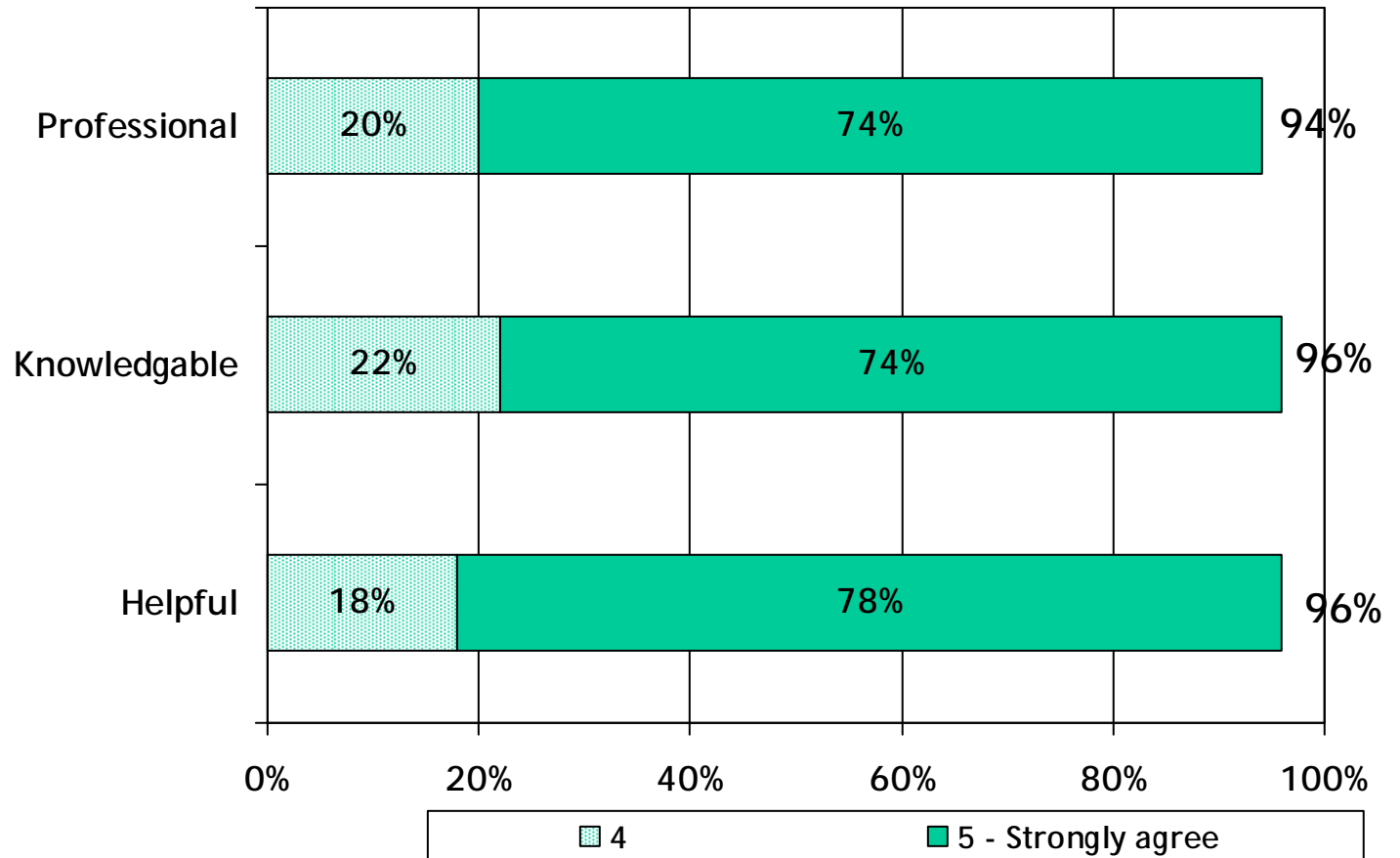
# The Commuter Store Staff

# Most Ballston Customers Agree With These Positive Statements About Commuter Store Staff



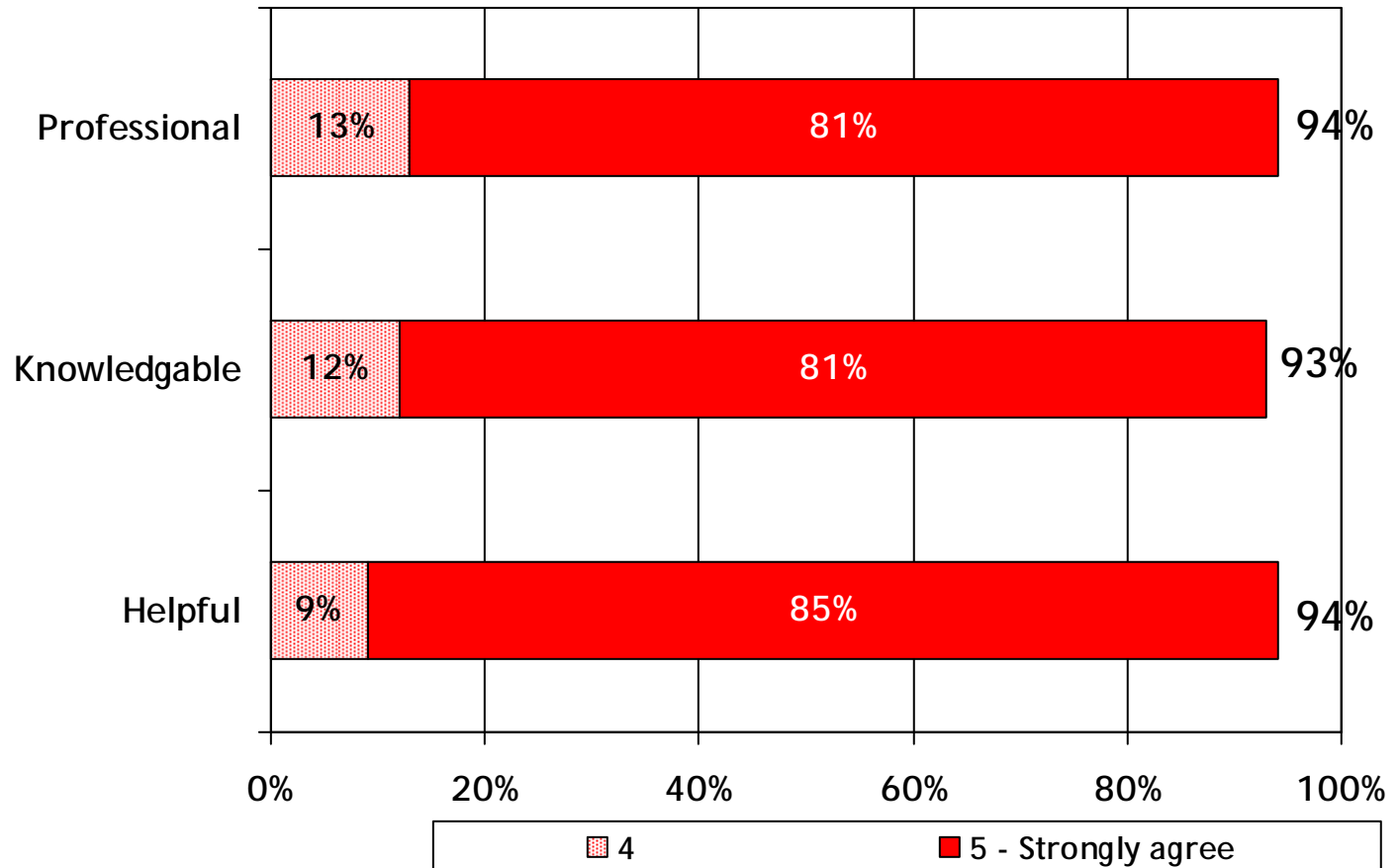
Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?

# Most Crystal City Customers Agree With These Positive Statements About Commuter Store Staff



Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?

# Most Rosslyn Customers Agree With These Positive Statements About Commuter Store Staff



Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?

## A Few Might Have Misunderstood the Ratings as Comments Did Not Match

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

Q12: You rated \_\_\_\_\_ a [1 or 2], why did you give that rating?

## But Some Did Have Negative Comments about the Staff

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

*"The young man is not so much rude as disinterested." - Rosslyn*

*"On phone when I was waiting." - Ballston*

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

*"she seemed new. She didnt know the routes. I could not get the info I needed." - Ballston*

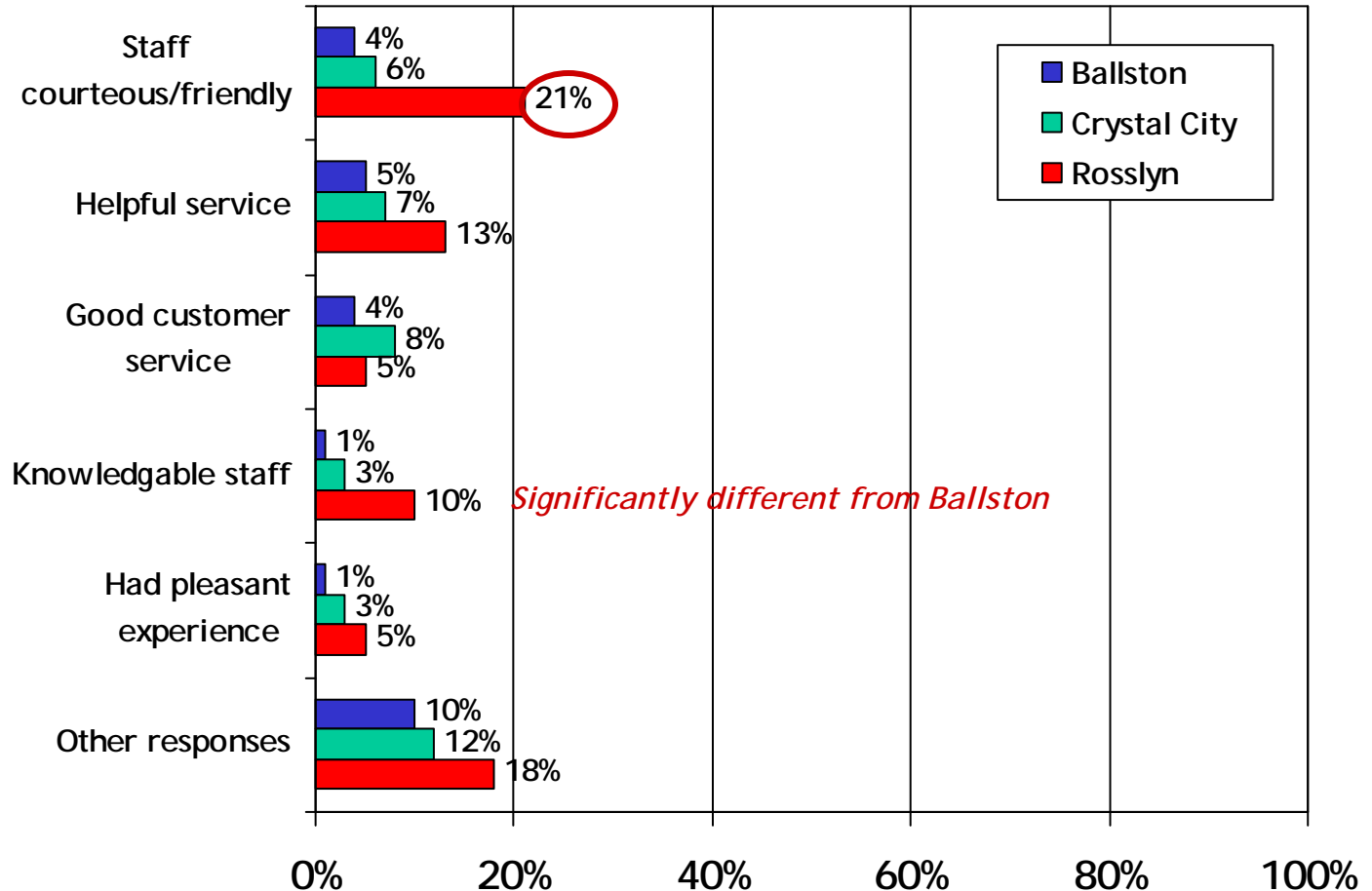
*"Because of the rude woman who works here" - Crystal City*

Q12: You rated \_\_\_\_\_ a [1 or 2], why did you give that rating?

# Most Did Not Have Comments On Their Ratings

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

Note: Some respondents gave multiple responses.

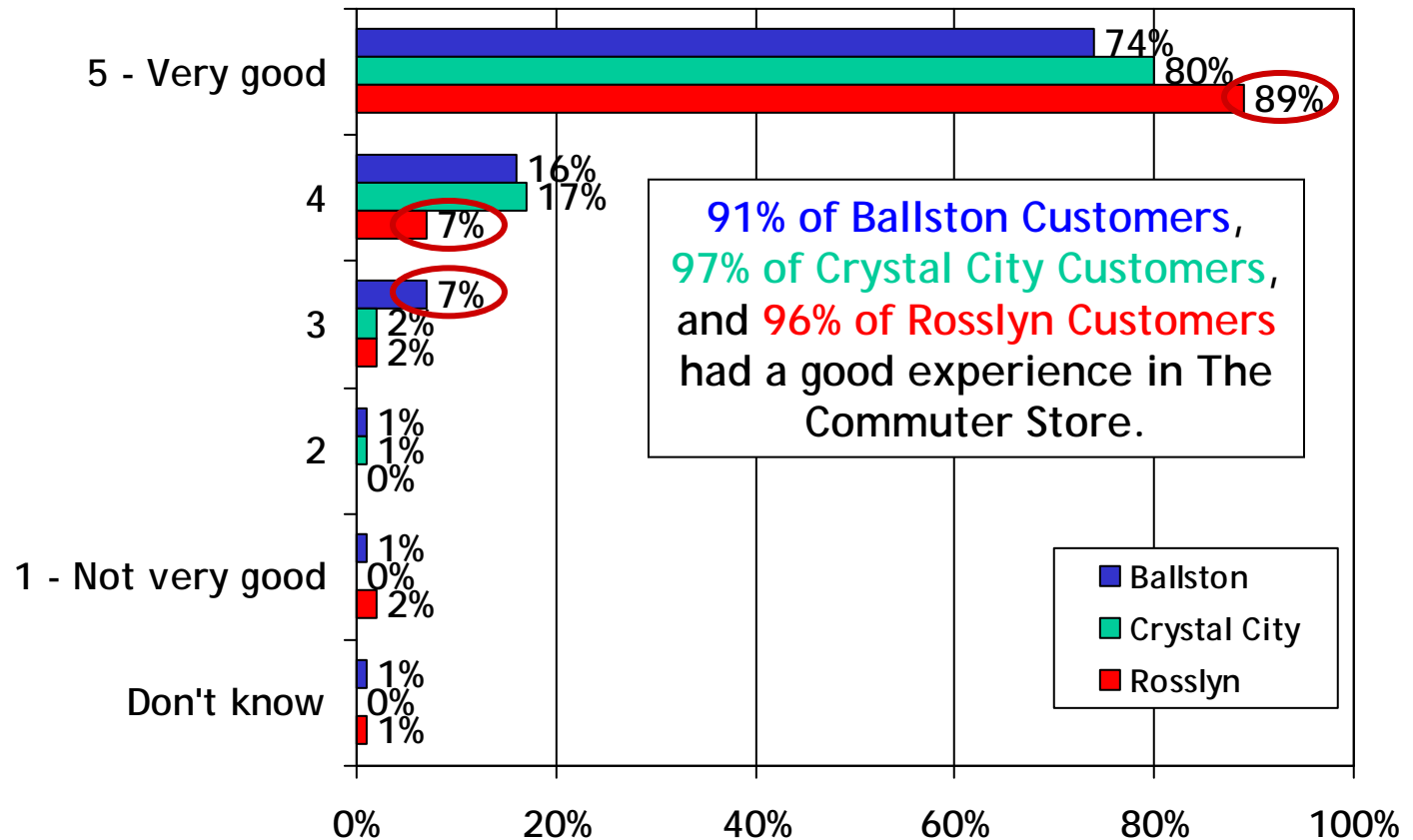


Ballston  
n = 80  
Crystal City  
n = 89  
Rosslyn  
n = 61

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

# Commuter Store Customer Satisfaction

# More Than 90% Had a Good Experience!



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

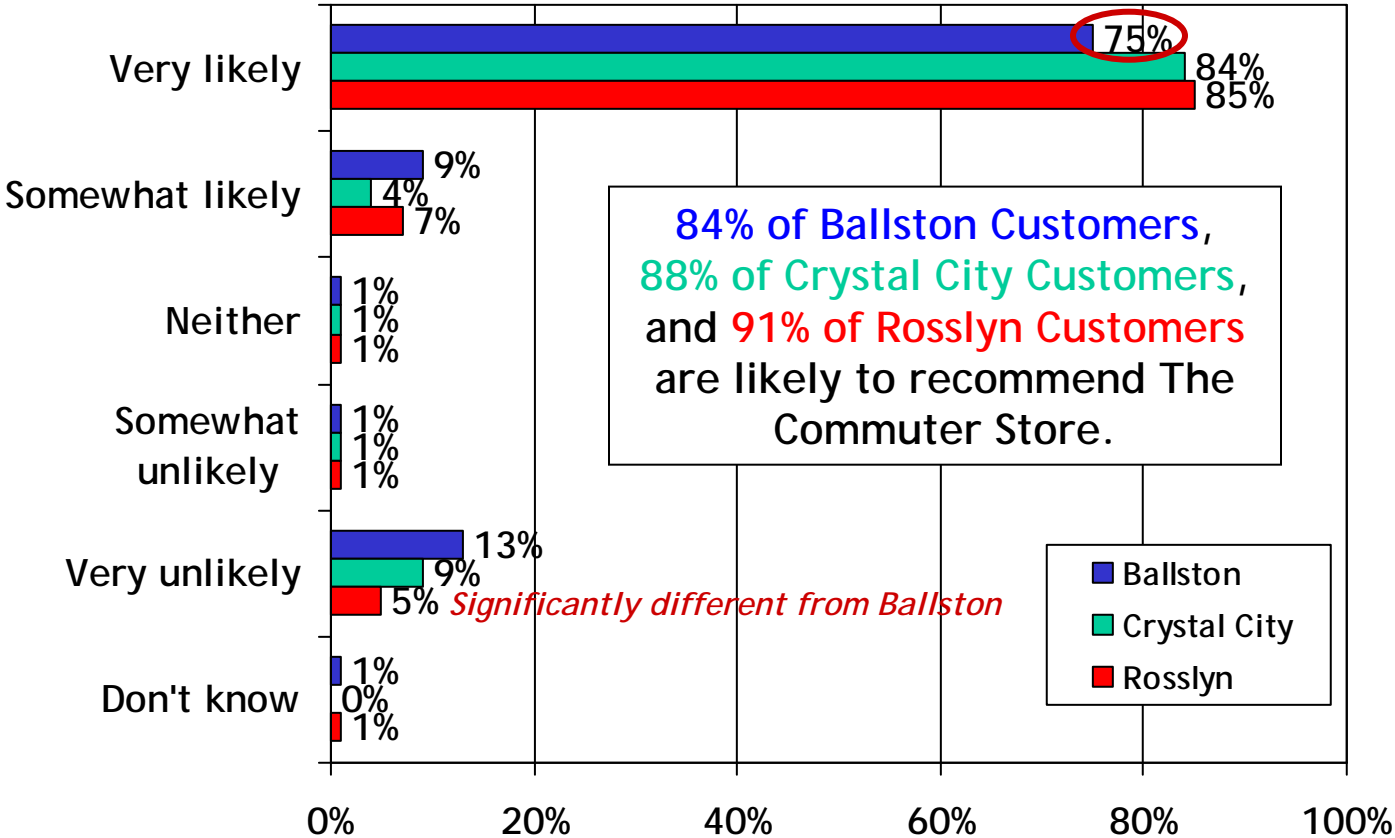
# There are a Few Differences Between Satisfied and Unsatisfied Customers

Only 28 of 549 Customers gave The Commuter Store a 1, 2, or 3 in satisfaction as opposed to a 4 or 5. For this purpose, these respondents are labeled "at-risk customers."

- First-time Visitors - 11 of the 28 people who gave a 1, 2, and 3 in satisfaction were first time visitors. And 10 of them gave the store a "3."
- Non-Employed - 11% of those who are not employed gave a 1, 2, or 3 in satisfaction vs. only 4% of those who are employed. This is statistically significant.
- Satisfaction does not appear to have an effect on The Commuter Store's impact on travel for work or non-work reasons.

# Most Are Likely to Recommend The Commuter Store

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



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



# The “Net Promoter Score”

- The Net Promoter Score is defined as

The percentage of promoters  
(somewhat/very likely to recommend)

**88%** *(all respondents)*

*Less:*

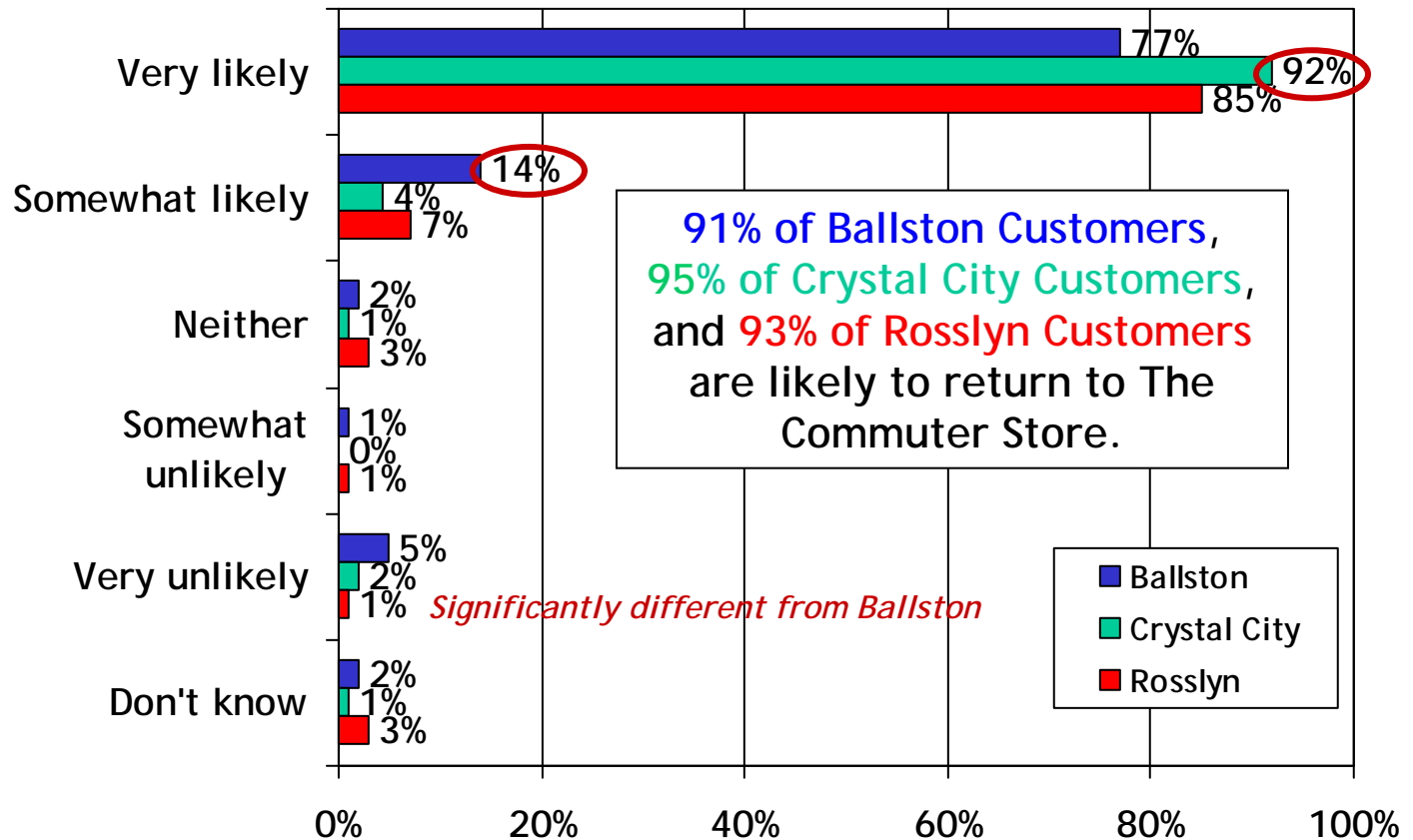
The percentage of detractors  
(somewhat/very unlikely to recommend)

**10%**

*Net Promoter Score* **78%**

- As a comparison, according to *Satmetrix*, selected companies have Net Promoter Scores as follows:
  - USAA - 82%      - Amazon - 73%
  - Costco - 79%    - Chick-Fil-A - 72%

# 93% Are Likely to Return to The Commuter Store



Q6: How likely are you to visit a Commuter Store in the future?

# Intent To Return is Significantly Affected By Different Characteristics

- Purchase during visit does not impact intent to return - 95% of those who made a purchase during that visit vs. 94% of those who did not are likely to return.
- Frequency of visit is positively correlated with intent to return:
  - 86% of those who visit less often than monthly intend to return.
  - 100% of those who visit monthly intend to return.
- 95% of Metrorail/rail riders vs. 87% of those who drive alone intend to return.

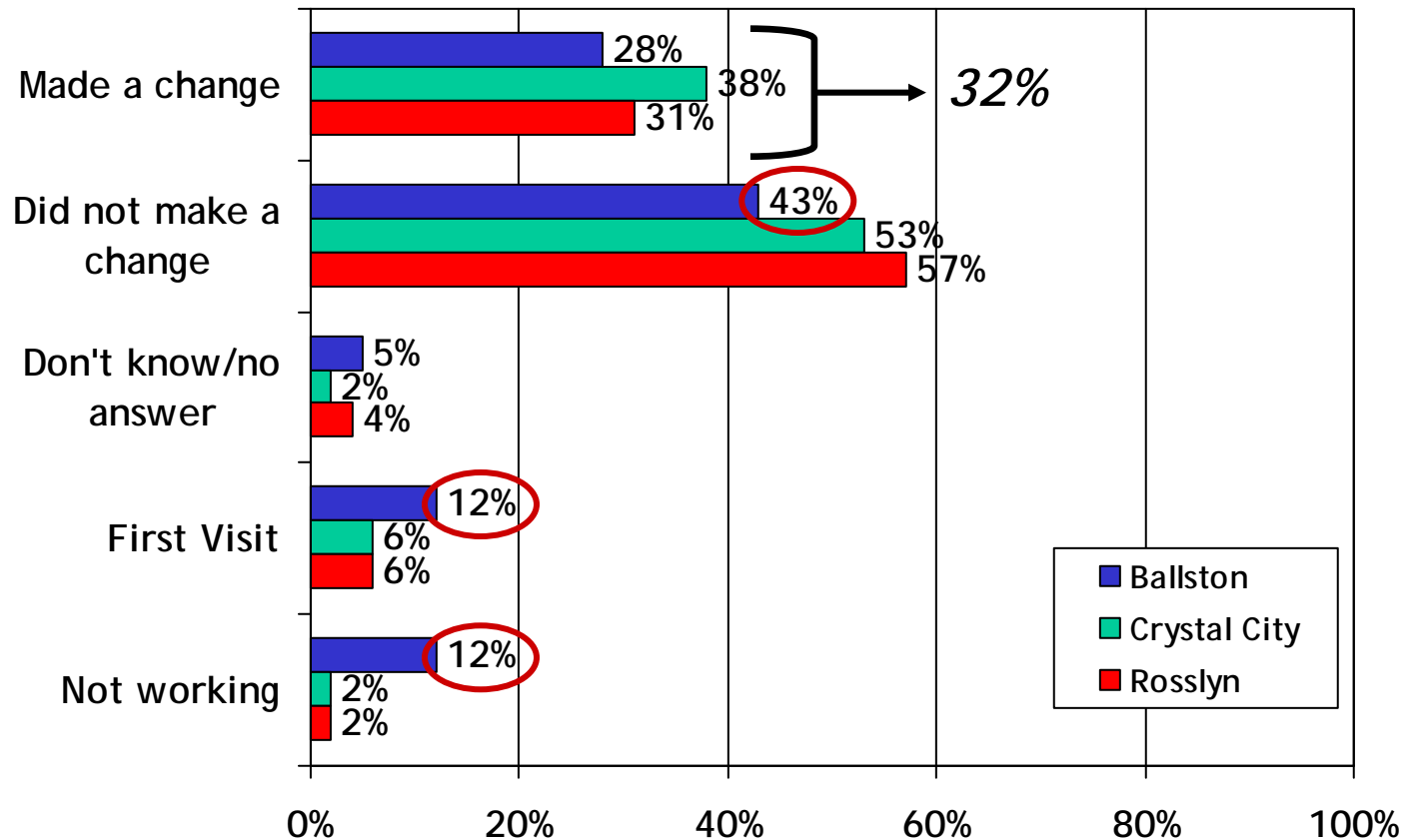
# The 13 Who Said They Will Not Return Had Various Reasons

- 6 do not need any more services
  - 3 in Ballston
  - 2 in Crystal City
  - 1 in Rosslyn
- 2 do not live or work near a Store
  - 1 in Ballston
  - 0 in Crystal City
  - 1 in Rosslyn
- 2 were just checking it out
  - 2 in Ballston
  - 0 in Crystal City
  - 0 in Rosslyn
- 3 had other reasons
  - 2 in Ballston
  - 1 in Crystal City
  - 0 in Rosslyn

# Impact of The Commuter Store™

# 32% Have Made a Change in Work Travel Since First Visiting The Commuter Store

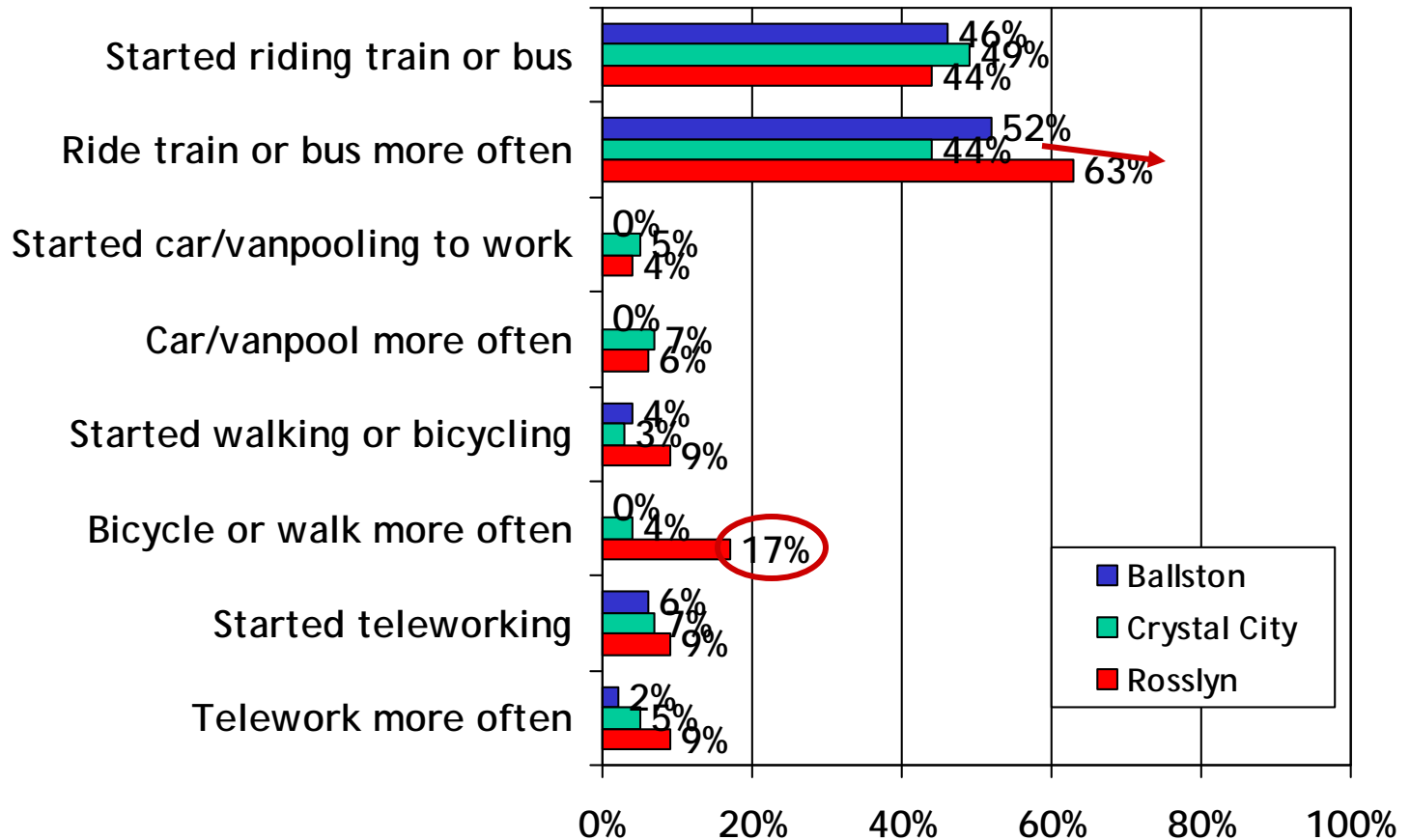
53% of those who made a change in how they travel to work vs. 39% of those who did not, make purchases from other sources.



Q17: Since you first visited The Commuter Store, have you made any of the following changes in how you travel to work?

# Most Work Travel Changes Involve Starting or Increasing Transit Use

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

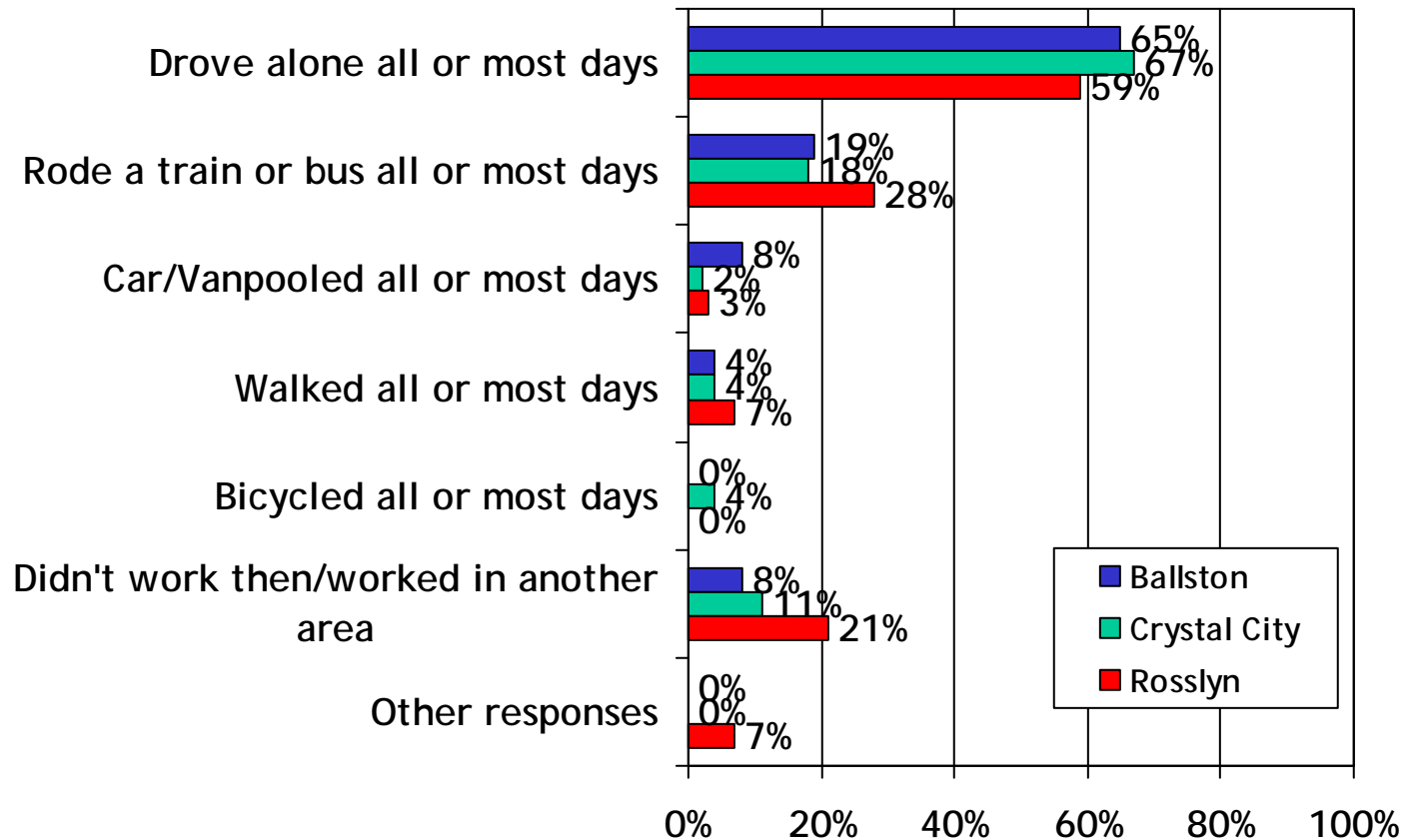


Note: Some respondents gave multiple responses.

Ballston  
n = 48  
Crystal City  
n = 75  
Rosslyn  
n = 54

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

# Most Who Changed Work Travel Previously Drove Alone



Ballston  
n = 26  
Crystal City  
n = 45  
Rosslyn  
n = 29

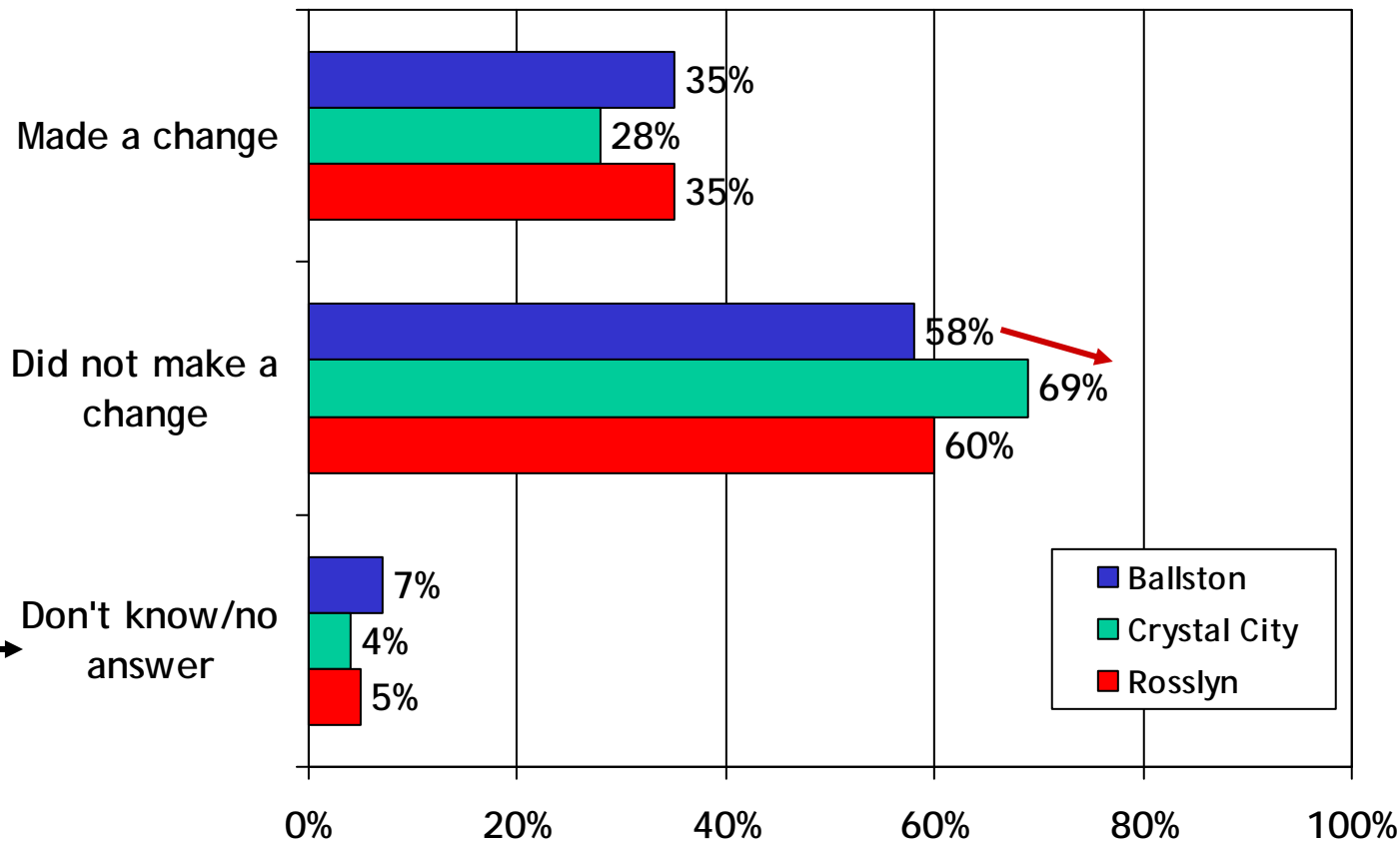
Q17A: How did you typically travel to work before you made this change?



# 32% Made a Change in Non-work Trips Since First Visiting The Commuter Store

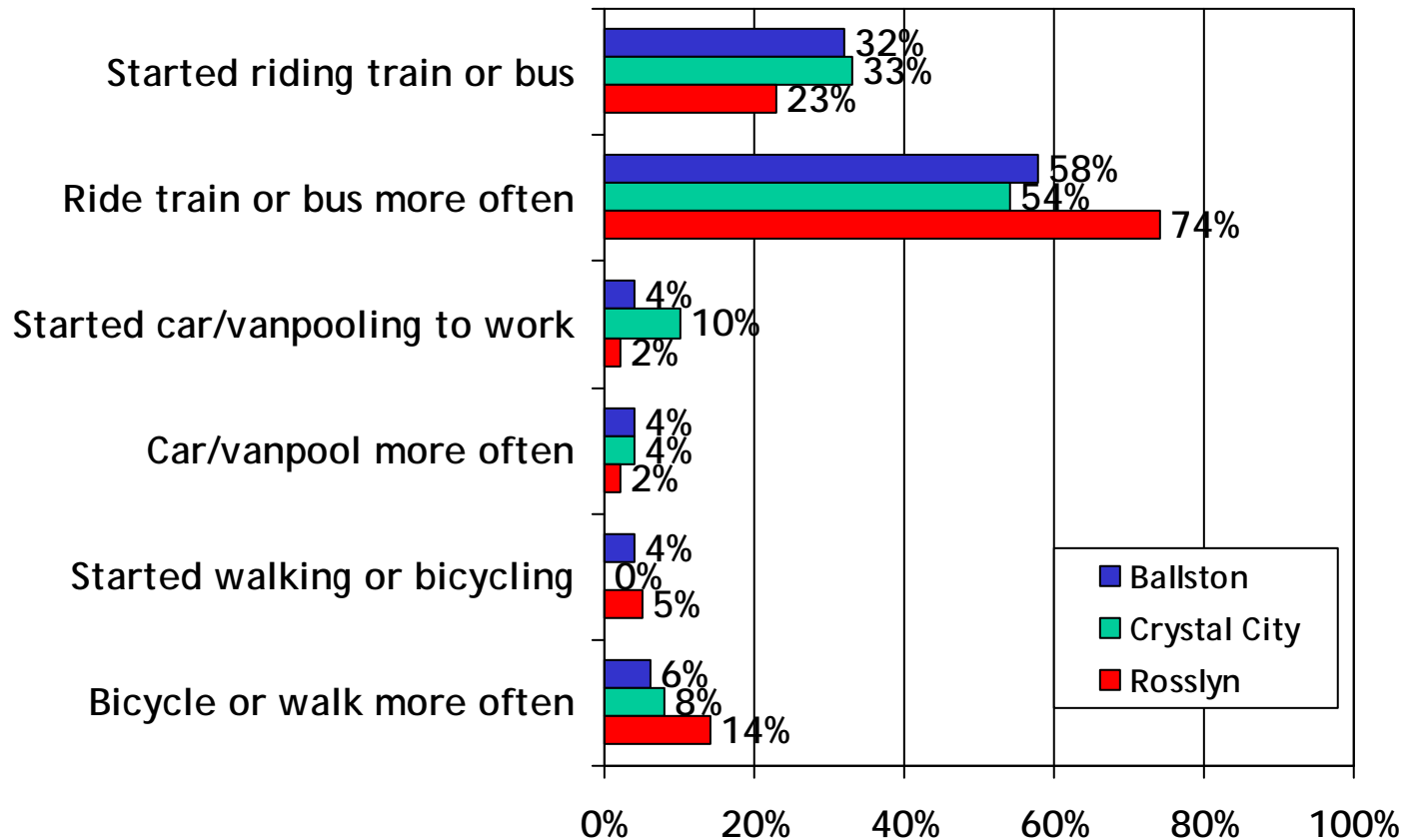
49% of those who made a change in how they travel to work vs. 40% of those who did not make purchases from other sources.

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



Q18: Since you first visited The Commuter Store, have you made any of the following changes in how you make non-work trips around Arlington County or around the Washington metropolitan region?

# Again, Most Changes Involved Transit Use

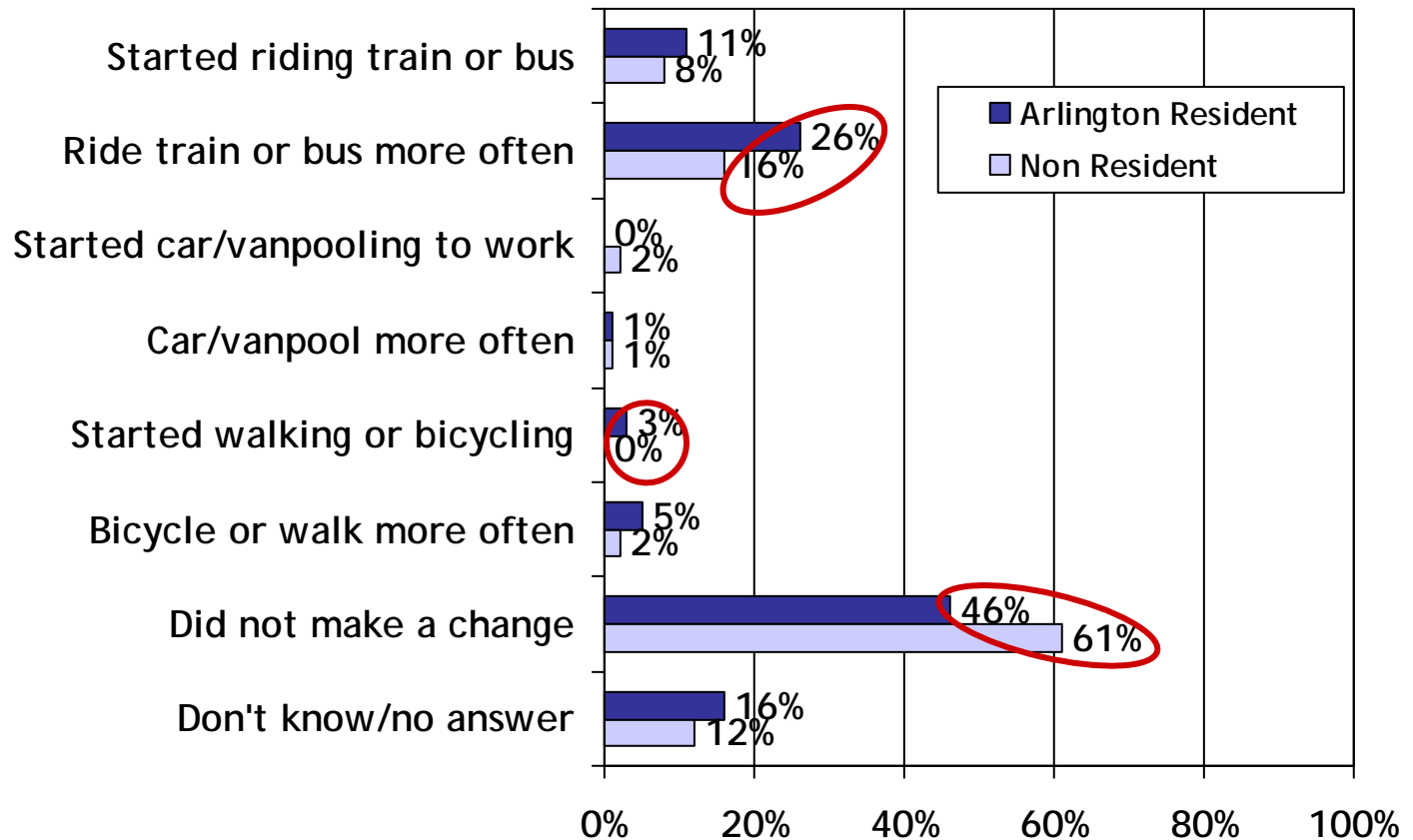


Q18: Since you first visited The Commuter Store, have you made any of the following changes in how you make non-work trips around Arlington County or around the Washington metropolitan region? ASKED ONLY OF THOSE WHO SAID THEY MADE A CHANGE

Note: Some respondents gave multiple responses.

Ballston  
n = 53  
Crystal City  
n = 52  
Rosslyn  
n = 57

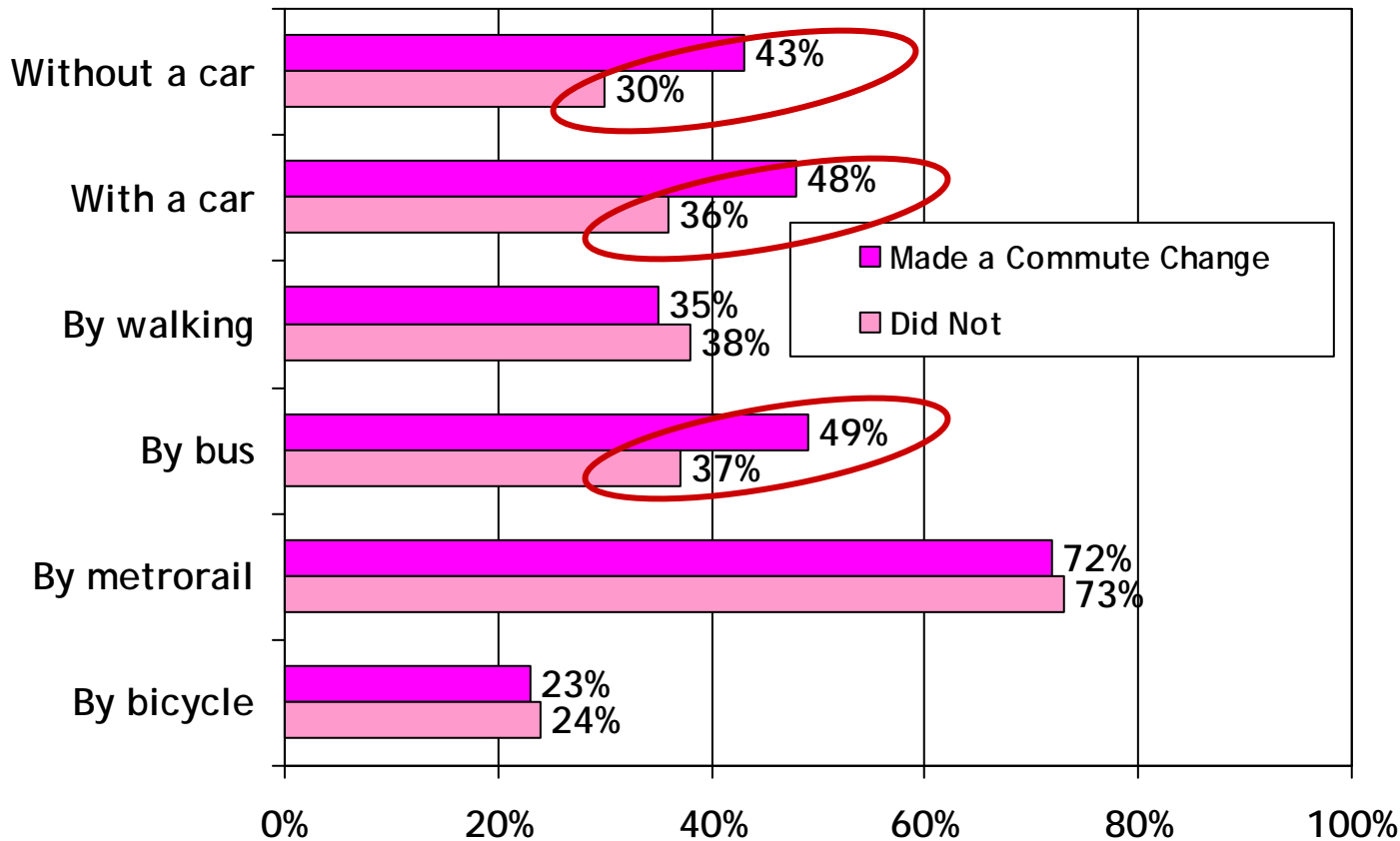
# Residents Are Less Likely to Have Made a Non-Work Change



Q18: Since you first visited The Commuter Store, have you made any of the following changes in how you make non-work trips around Arlington County or around the Washington metropolitan region?

# Those Who Made a Commute Change Tend To Find it More Difficult to Get Around

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



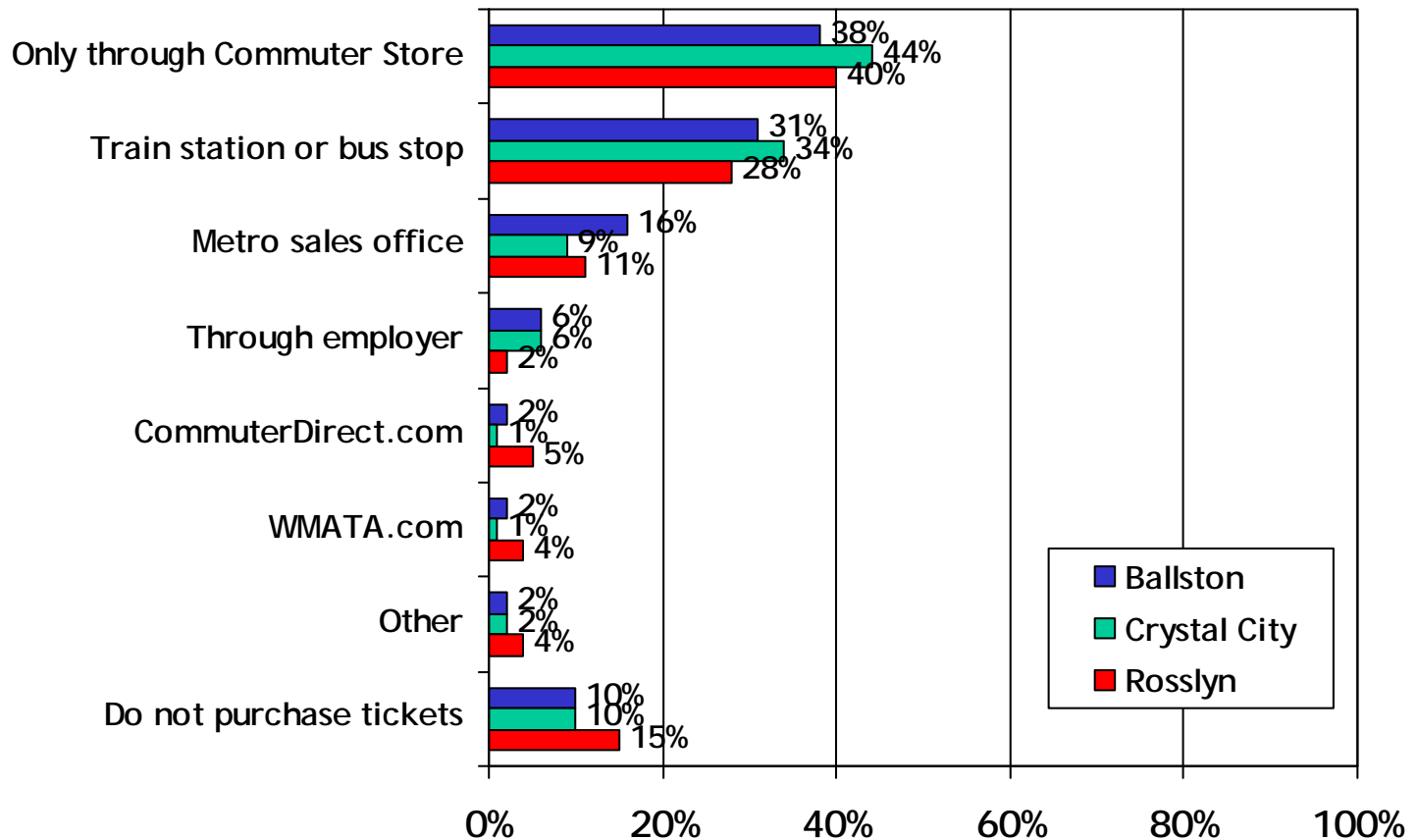
Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.

# The "Competition"

# Slightly Less than Half Purchase Ticket Media from Places Other than The Commuter Store

Note: Some respondents gave multiple responses.

The younger the customer, the lower their income, and the less often they visit, the more likely they are to purchase ticket media from other sources. Those who do not live and those who do not work in Arlington are more likely to purchase through other sources than their counterparts.



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

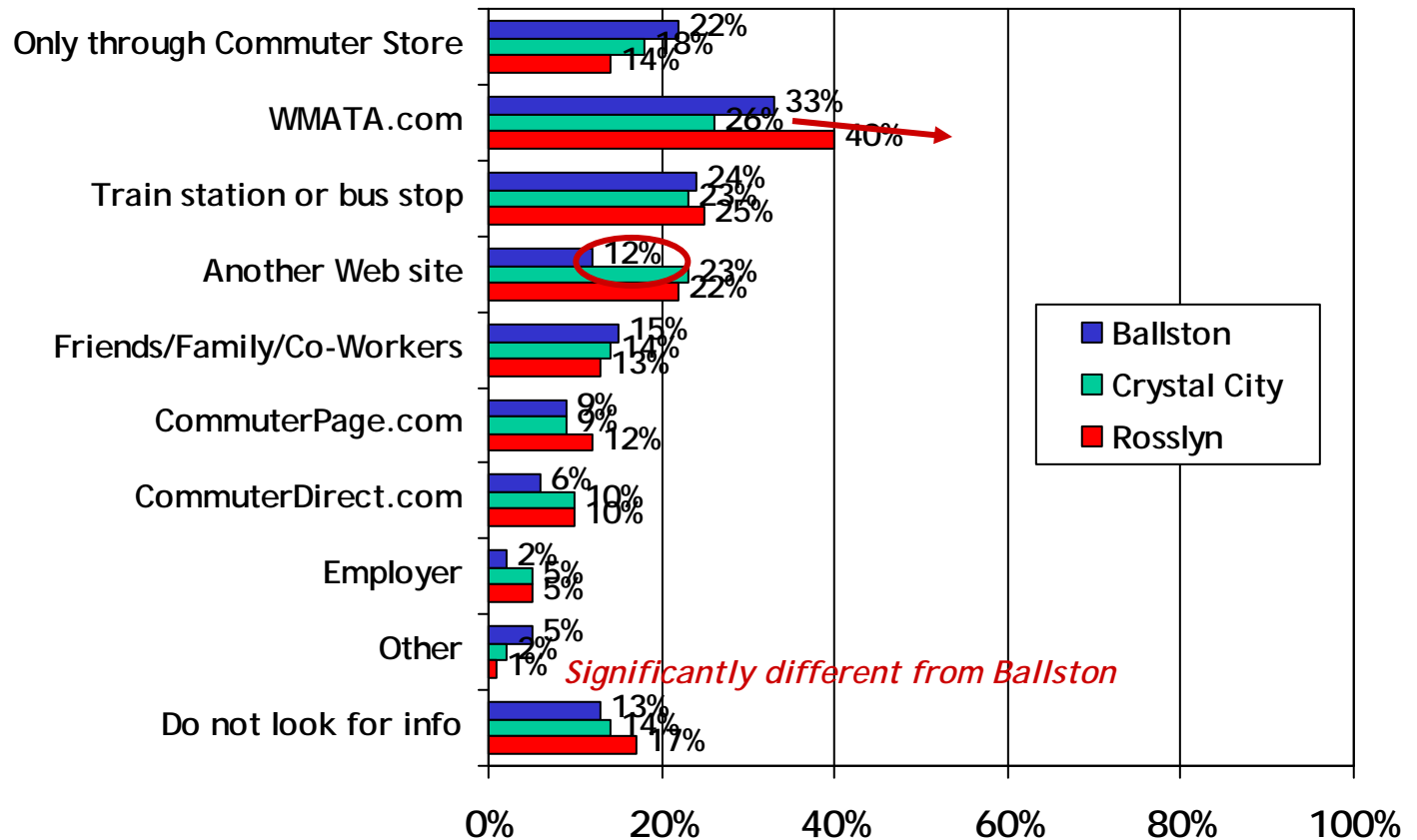
Note: Some respondents gave multiple responses.

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

The younger the customer, the more likely they are to look for travel info from other sources. Those who do not live and those who do not work in Arlington are more likely to look for travel info from other sources.

Those who are employed are more likely to look for travel info from other sources.

Those who purchase from other sources are more likely than those who only purchase from The Commuter Store to look for info elsewhere (81% vs. 55%).



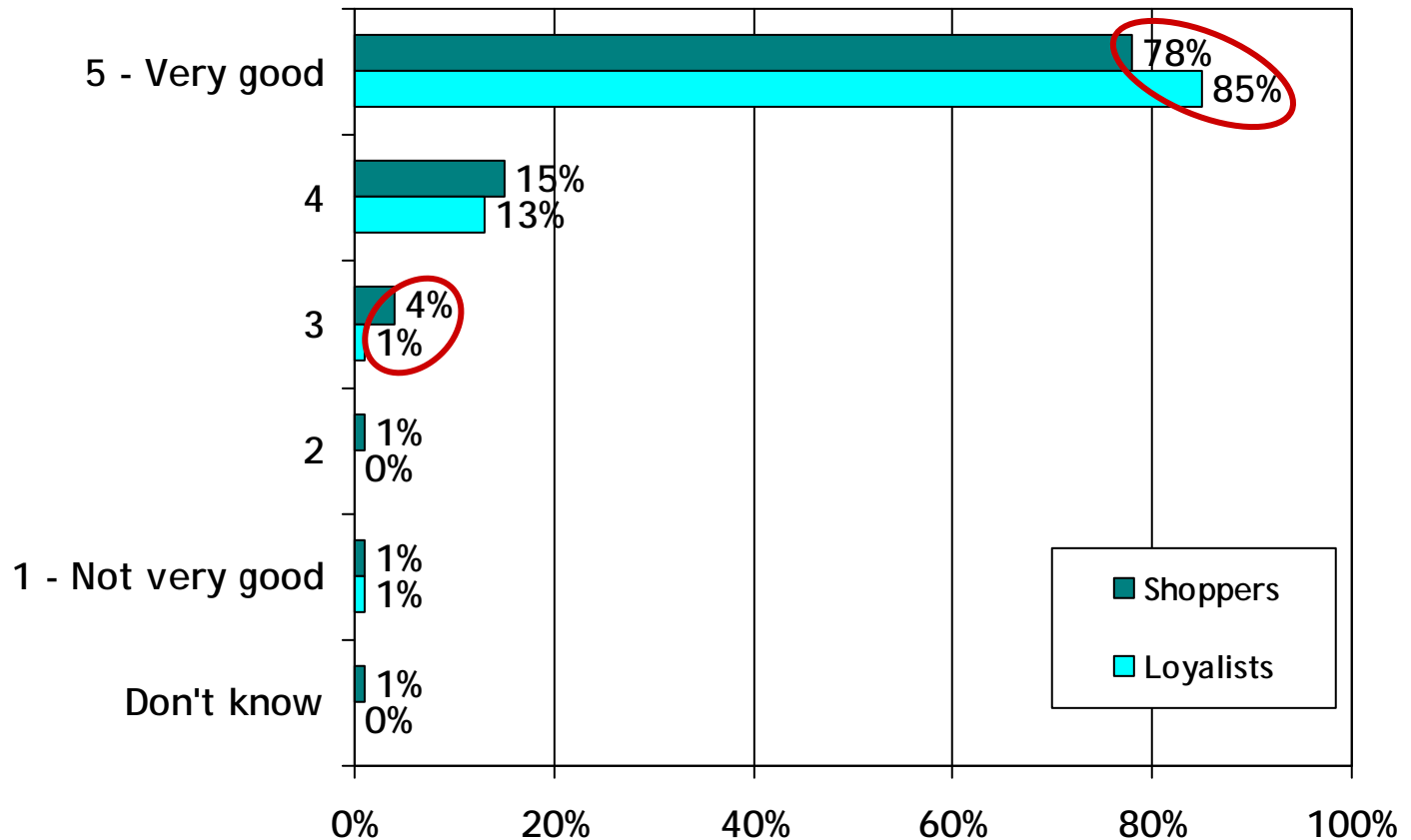
Q8: Do you look for local travel information through any sources other than The Commuter Store?

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

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

Neither are significantly more likely to recommend The Commuter Store.

# Not Surprisingly, Loyalists Are More Satisfied



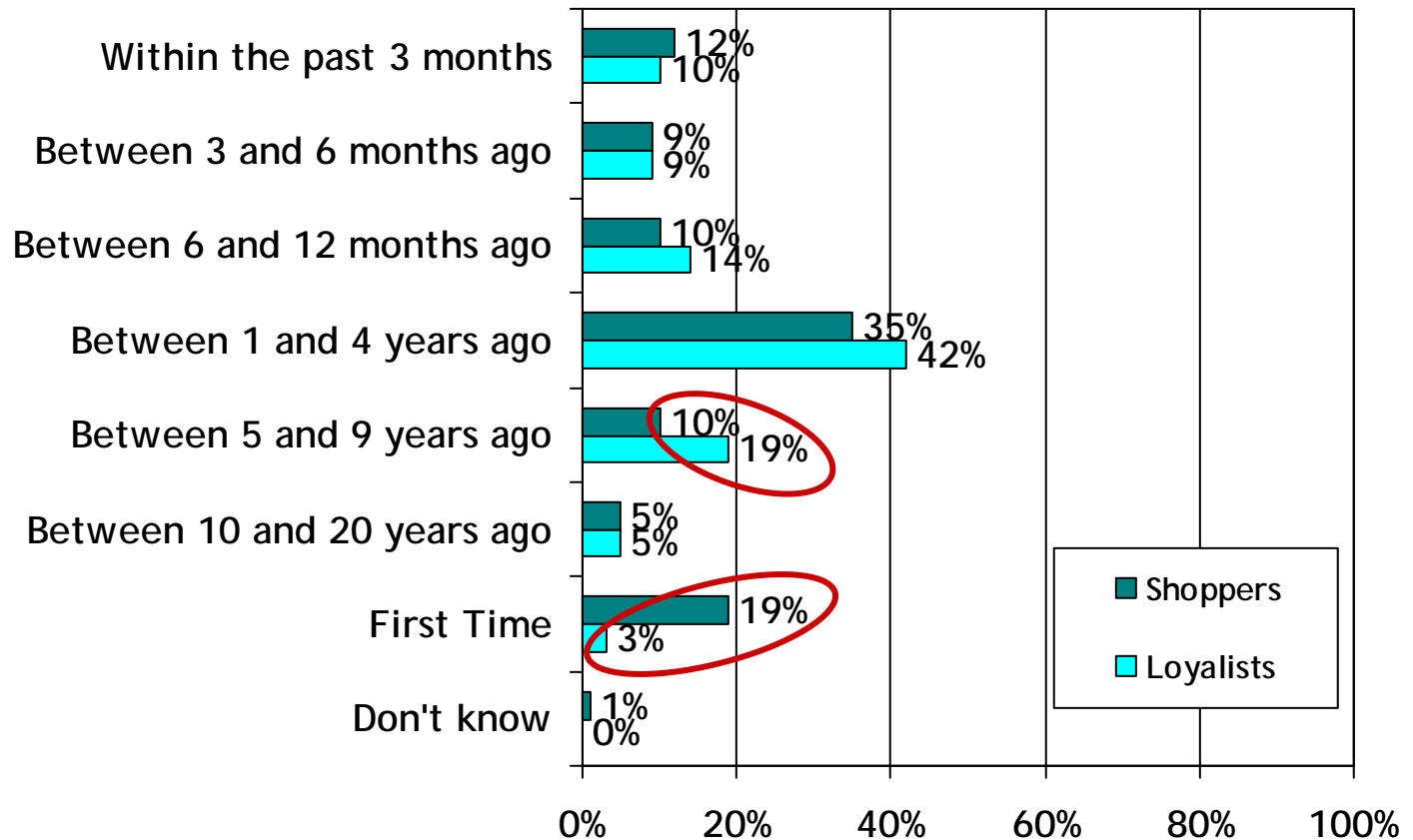
Q3: Think about the experience you just had in the Store today. How would you rate your overall experience in The Commuter Store?

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

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

# Long-time Customers are More Loyal

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



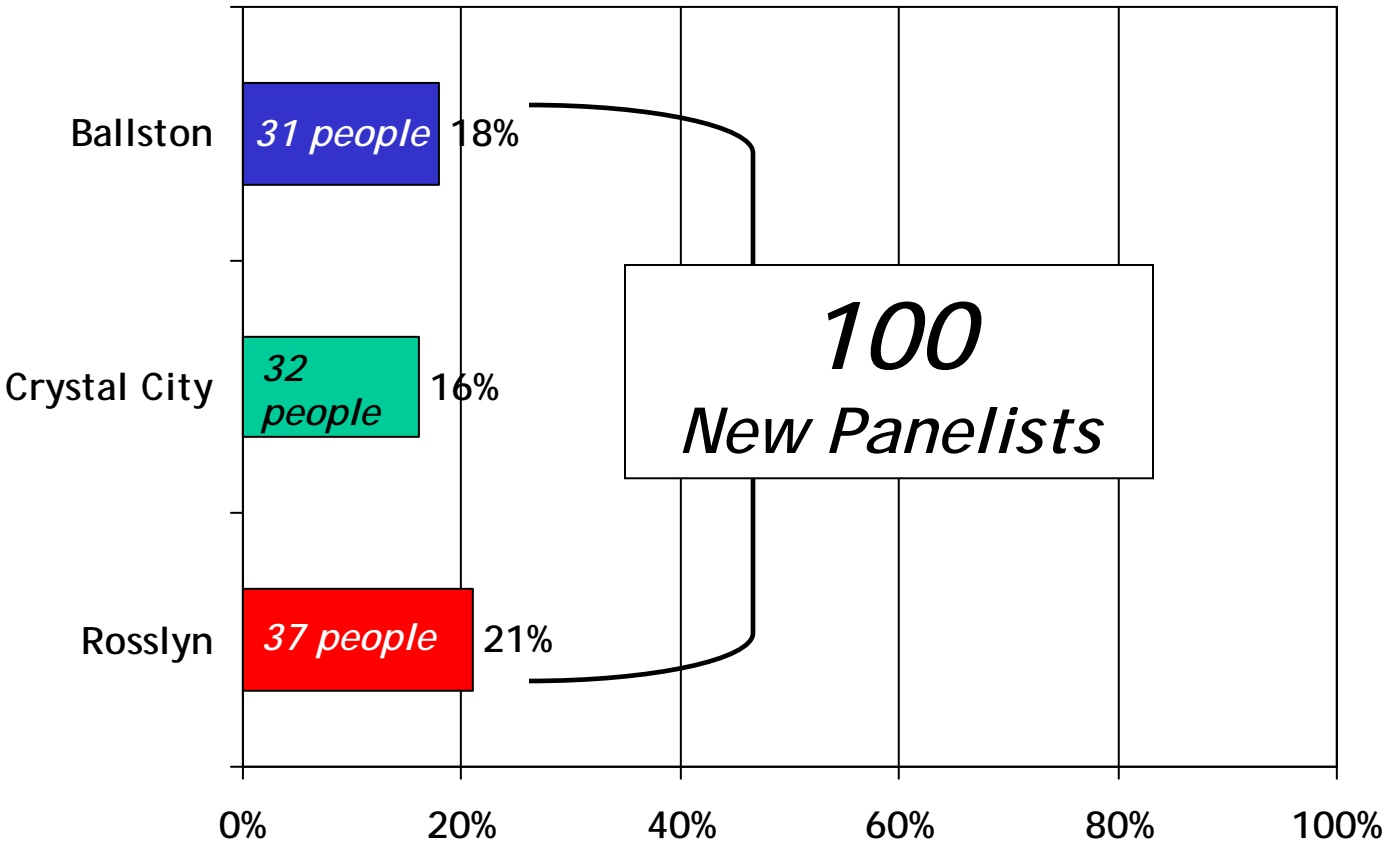
Q10: When did you first visit The Commuter Store?

# ACCS Customer Panel

*Q29: From time to time we would like to test new transportation services and programs with a panel made up of people like you. Panel members would share their opinions with us through short email surveys. We would not use your email for any other purpose - just periodic feedback.*

*Would you be interested in possibly participating on such a panel?*

# 100 Respondents Would Like to Join the Commuter Stores Marketing Feedback Panel



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

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

# Panel Demographics

	<u>Total</u>	<u>Panel</u>
Good/Excellent experience	94%	93%
Likely to return	93%	98%
Visit at least monthly	67%	70%
Customer for a year or more	64%	64%
Arlington Resident	20%	20%
Arlington Employment	51%	56%
At least 2 years in AC	77%	70%
Employed	55%	92%
Primary mode - Drive alone	9%	7%
Mean age	47	46
Race - White, non-Hispanic	55%	55%
Mean annual income	\$96K	\$101K
Female	36%	41%

# Key Take-A-Ways

# *Increase Awareness of The Commuter Store™*

# Is Low Resident Use Due to Low Awareness or Low Need?

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

# Once They Get to the Store, Good Things Happen

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

*Increasing awareness of  
The Commuter Stores would  
lead to more usage,  
more satisfaction,  
more ticket sales,  
and less driving alone*

# *Solidify Your Brand Proposition*

# Make The Commuter Store The Place to Go for Commuters and Residents

- Become more action oriented in store communication.
- Focus on fare media that is difficult to get elsewhere. The Commuter Store has everything, but this message may be overwhelming for customers.
- Use customer testimonials and play up customer service.
- The Stores are an avenue for serving underserved markets, an idea which can be built upon.

*For Additional Information  
on this Study Contact:*

Christy Evanko  
Southeastern Institute of Research  
804-358-8981

# APPENDIX

# Ballston Store Home Zip Codes

<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
02130	1	20110	2	20772	1	21221	2
17402	1	20112	1	20816	1	21227	1
19130	1	20120	1	20871	1	21228	1
20005	1	20136	1	21042	1	21230	1
20007	1	20166	1	21043	3	21701	1
20008	1	20170	1	21044	1	21755	1
20016	1	20706	1	21085	1	21771	1
20017	1	20707	2	21113	1	21921	1
20019	1	20743	1	21136	1	22003	3
20036	1	20748	2	21144	1	22004	1
<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
22012	1	22101	1	22207	9	22701	1
22030	2	22152	1	22209	1	22712	1
22031	1	22191	1	22211	1	25405	2
22032	1	22192	2	22302	1	25411	1
22033	1	22193	1	22304	1	25414	1
22041	4	22201	9	22306	2		
22042	2	22203	24	22309	2	Arlington Zip Codes	
22044	2	22204	24	22310	1		
22046	3	22205	8	22311	3		
22079	1	22206	4	22405	1		

# Ballston Store Work Zip Codes

<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
02203	1	20426	1	22152	1	22211	1
17402	1	20520	2	22201	8	22226	4
20002	1	20743	4	22202	1	22230	14
20003	1	21755	1	22203	43	22233	1
20005	2	22003	1	22204	9	22243	1
20019	1	22031	1	22205	4	22304	1
20024	1	22035	1	22206	1	22307	1
20036	1	22044	1	22207	4	22309	1
20192	1	22046	1	22209	2	22314	1
20240	1	22101	1	22210	1	Arlington Zip Codes	

# Crystal City Store Home Zip Codes

<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
02080	1	20112	6	20191	1	20794	2	21045	1
12117	1	20120	1	20623	1	20814	1	21078	1
20006	1	20121	1	20659	1	20854	1	21113	3
20011	1	20124	3	20708	1	20855	1	21133	1
20019	3	20136	5	20715	1	20878	1	21144	1
20020	1	20152	1	20716	1	20903	1	21201	1
20024	1	20155	1	20737	1	21037	1	21208	1
20032	1	20169	1	20743	1	21040	1	21212	1
20110	8	20187	3	20745	2	21042	1	21224	1
20111	7	20190	1	20772	1	21044	1	21227	1
<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
21228	1	22033	1	22192	5	22312	1	22554	8
21231	2	22042	1	22193	4	22401	1	22555	3
21234	1	22043	1	22201	1	22405	5	22556	1
21403	1	22047	1	22202	6	22406	7	22712	1
21755	1	22079	5	22204	1	22407	7	22742	1
22003	1	22151	1	22206	1	22408	3	22810	1
22015	5	22152	1	22302	2	22409	1	23456	1
22025	1	22153	1	22303	1	22485	1	25401	1
22026	1	22172	2	22309	1	22508	1	25413	1
22032	3	22191	11	22310	1	22546	1	25425	1
								25443	1
								28376	1

Arlington Zip Codes

# Crystal City Store Work Zip Codes

<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
20002	2	20310	3	20585	1
20003	2	20330	1	20591	3
20026	1	20374	1	20593	1
20044	1	20380	1	20814	1
20110	1	20405	1	20892	1
20202	1	20472	2	21037	1
20222	1	20520	1	22022	1
20250	1	20543	1	22055	1
<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
22111	1	22212	3	22312	1
22172	1	22214	1	22331	1
22201	2	22215	1	22407	1
22202	125	22221	1	22408	1
22203	4	22223	1	22556	1
22204	1	22230	1	27301	1
22209	2	22240	2		
22210	1	22302	2		

Arlington Zip Codes



# Rosslyn Store Home Zip Codes

<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
17320	1	20124	1	20720	1	20895	2	21108	1
20001	1	20136	2	20722	1	20904	1	21113	4
20002	3	20148	1	20723	3	20912	1	21144	4
20005	1	20155	1	20724	1	21009	2	21202	1
20007	1	20169	1	20735	2	21013	1	21206	1
20008	1	20171	1	20755	1	21040	1	21209	1
20011	1	20173	1	20785	1	21043	2	21218	2
20019	2	20194	1	20842	1	21045	2	21223	1
20036	2	20601	1	20874	3	21054	1	21227	1
20112	1	20707	1	20878	1	21061	1	21228	2
20120	2	20715	2	20886	1	21075	2	21229	1
<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
21234	1	22025	3	22192	2	22301	2	22554	1
21403	1	22026	2	22193	3	22302	1	22601	1
21701	3	22031	1	22201	1	22303	1	24477	1
21702	1	22033	1	22202	1	22304	4	25414	1
21710	1	22036	1	22203	5	22305	1	25425	2
21713	1	22039	1	22204	1	22311	1	25430	1
21769	1	22060	1	22205	2	22314	2	28442	1
21782	1	22079	1	22207	7	22405	1		
21903	1	22101	1	22209	16	22407	2		
22015	2	22191	2	22213	1	22553	1		

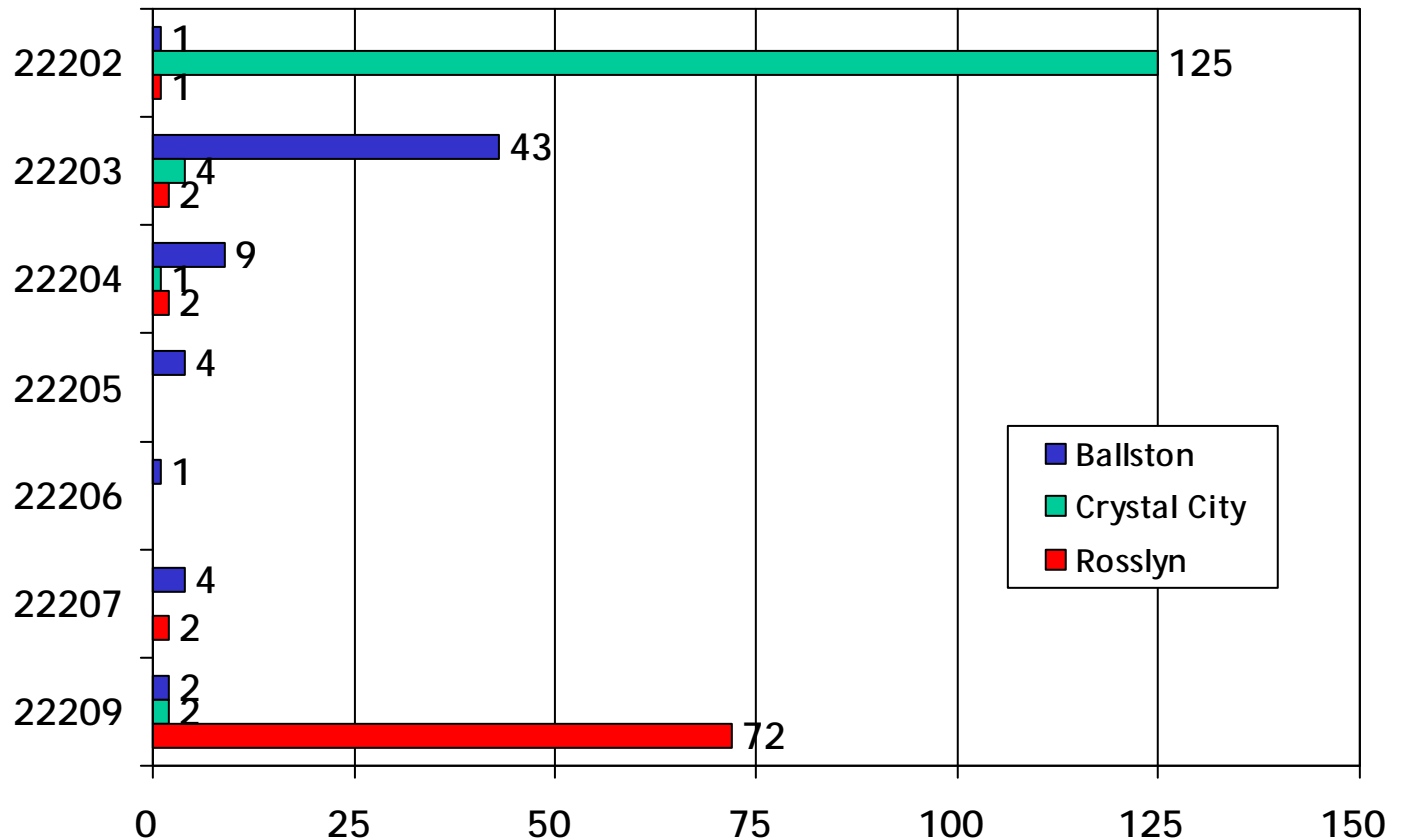
Arlington Zip Codes



# Rosslyn Store Work Zip Codes

<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
20001	1	20024	1	20250	2
20002	3	20026	1	20330	2
20004	1	20029	1	20340	1
20005	2	20036	5	20407	1
20006	8	20037	2	20420	1
20007	2	20054	1	20431	1
20008	1	20202	1	20460	2
20009	3	20209	1	20549	1
20016	1	20240	2	20852	1
<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>	<u>Zip</u>	<u>Quantity</u>
20877	1	22111	1	22304	1
20912	1	22201	2	22314	1
21060	1	22202	1	22318	1
21229	1	22203	2	22401	1
21401	1	22204	2	22980	1
21520	1	22207	2		
22010	2	22209	72		
22033	2	22219	3	Arlington Zip Codes	
22040	1	22301	1		

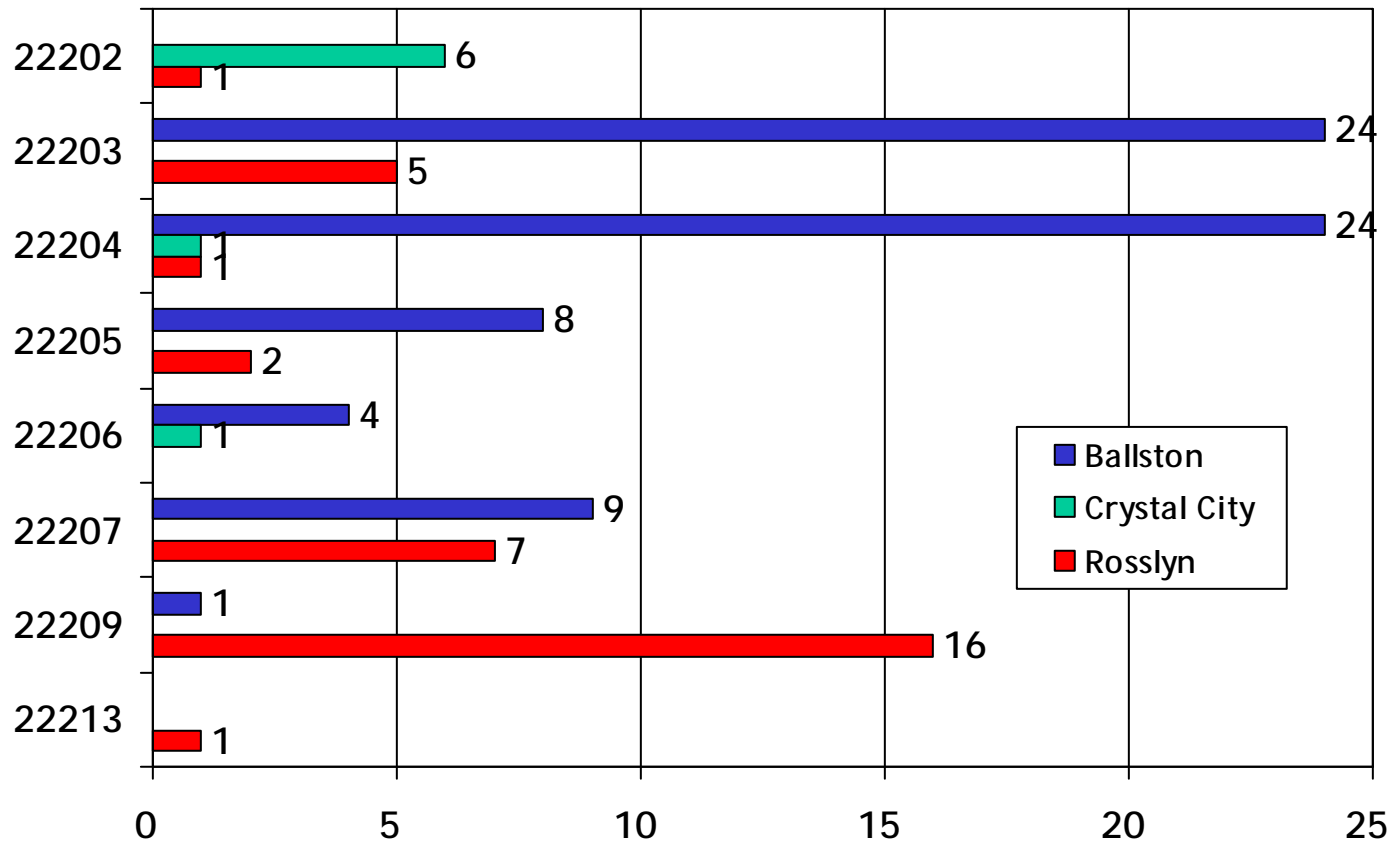
# Arlington County Zip Codes - Work



Ballston is in 22203, Crystal City is in 22202, and Rosslyn is in 22209

Q24: What is your work zip code?

# Arlington County Zip Codes - Home



Ballston is in 22203, Crystal City is in 22202, and Rosslyn is in 22209

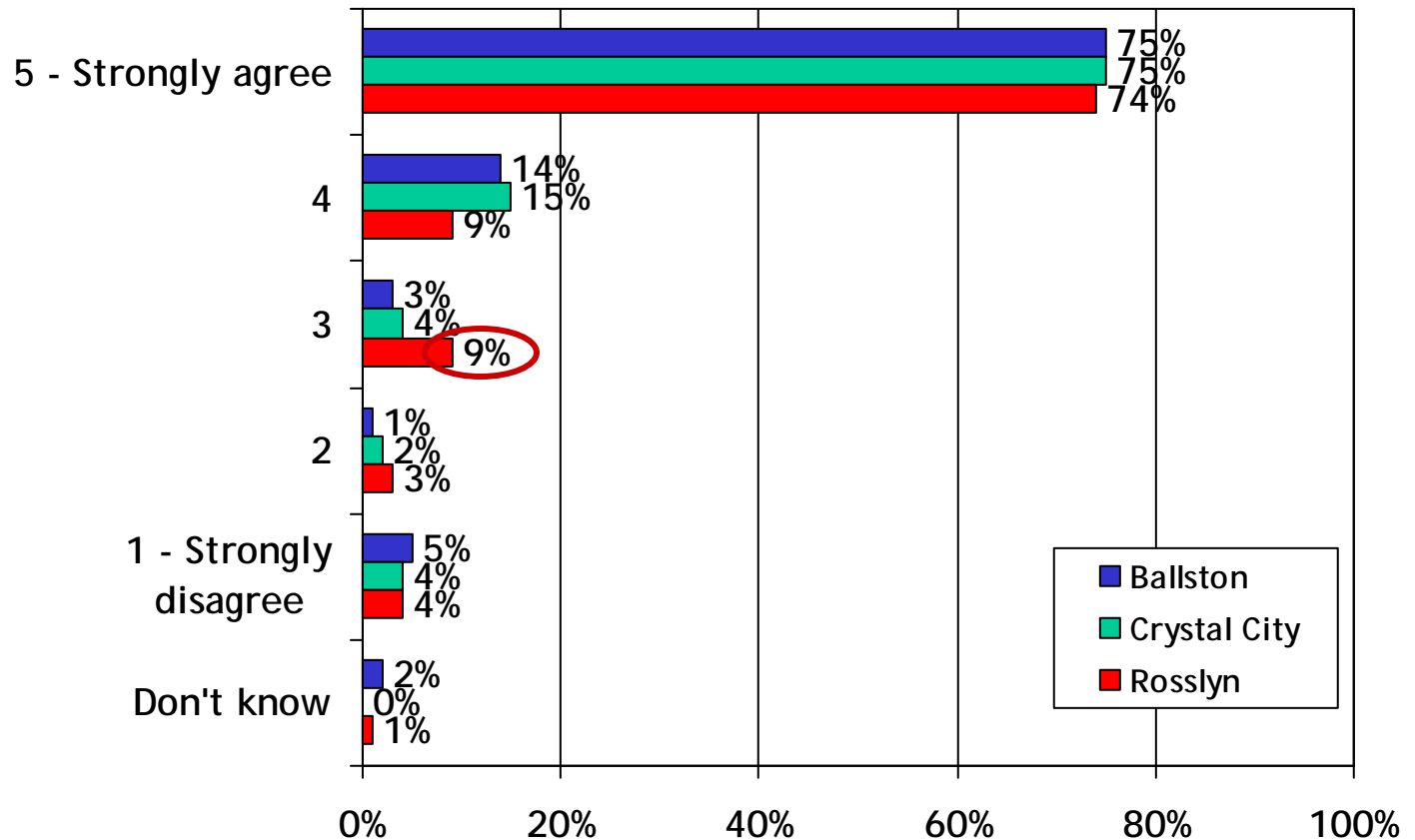
Q20: What is your home zip code?

# Breakdown Of Purchases

	Ballston	Crystal City	Rosslyn		Ballston	Crystal City	Rosslyn
<b><u>SmarTrip</u></b>				<b><u>Unspecified Rail</u></b>			
SmarTrip card	20	9	18	One Day Rail Pass	1	0	0
<b><u>Transit Link</u></b>				Rail/train (non specific)	2	2	0
TLC	14	16	50	<b><u>Omniride</u></b>			
<b><u>Metrorail</u></b>				Omniride tokens/Omnilink	5	5	5
7-Day Fast Trip Pass	1	0	1	<b><u>Discounted Fares</u></b>			
7-Day Short Trip Pass	1	0	1	Metrobus Flash (disabled or senior)	1	0	0
Metrorail farecard	0	0	2	Metrobus Weekly Disabled or Senior Pass	3	0	0
<b><u>Metrobus</u></b>				Senior/Disabled Rail Farecard	5	1	2
Bus (non specific)	23	2	1	Senior/disabled/other discount (not specific)	11	4	6
Metrobus Weekly Pass	5	1	2	STAR 2Bucks	2	0	1
<b><u>Unspecified Metro</u></b>				Super Senior Taxi	2	1	0
Metro (non specific)	9	3	0	<b><u>Other</u></b>			
Metrobus Flash	5	0	0	Arlington County ParkSmart card	1	3	2
Metrobus tokens	4	2	1	Commuter Card (non-specific)	0	3	0
<b><u>MARC</u></b>				Farecard (not specified)	2	0	0
MARC (non-specific)	10	13	11	Georgetown Bus Pass	0	0	3
Penn MARC	0	0	2	Monthly (non-specific)	0	5	0
<b><u>VRE</u></b>				Other	3	8	5
VRE - Ten-trip Ticket	0	1	0	Tokens (unspecific)	3	13	8
VRE - non-specific	3	71	6	Unlimited Monthly Ticket	1	0	2
VRE - The Monthly Ticket	0	12	1	Weekly pass (not specific)	4	0	1

PQ2: Did you make a purchase?

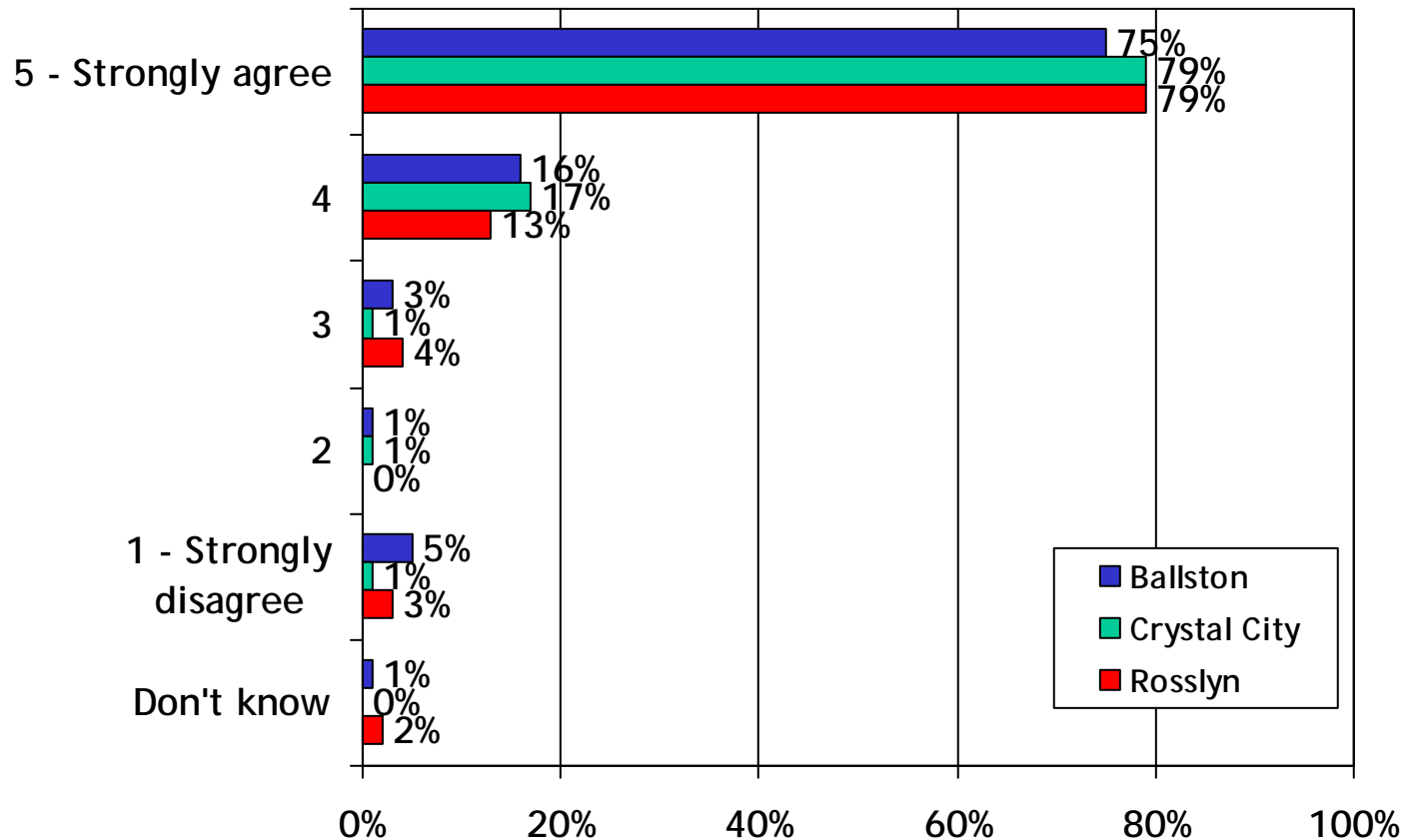
“The location of the store is convenient to my work or home.”



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

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

“It’s easy to find my way around in the store.”



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

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

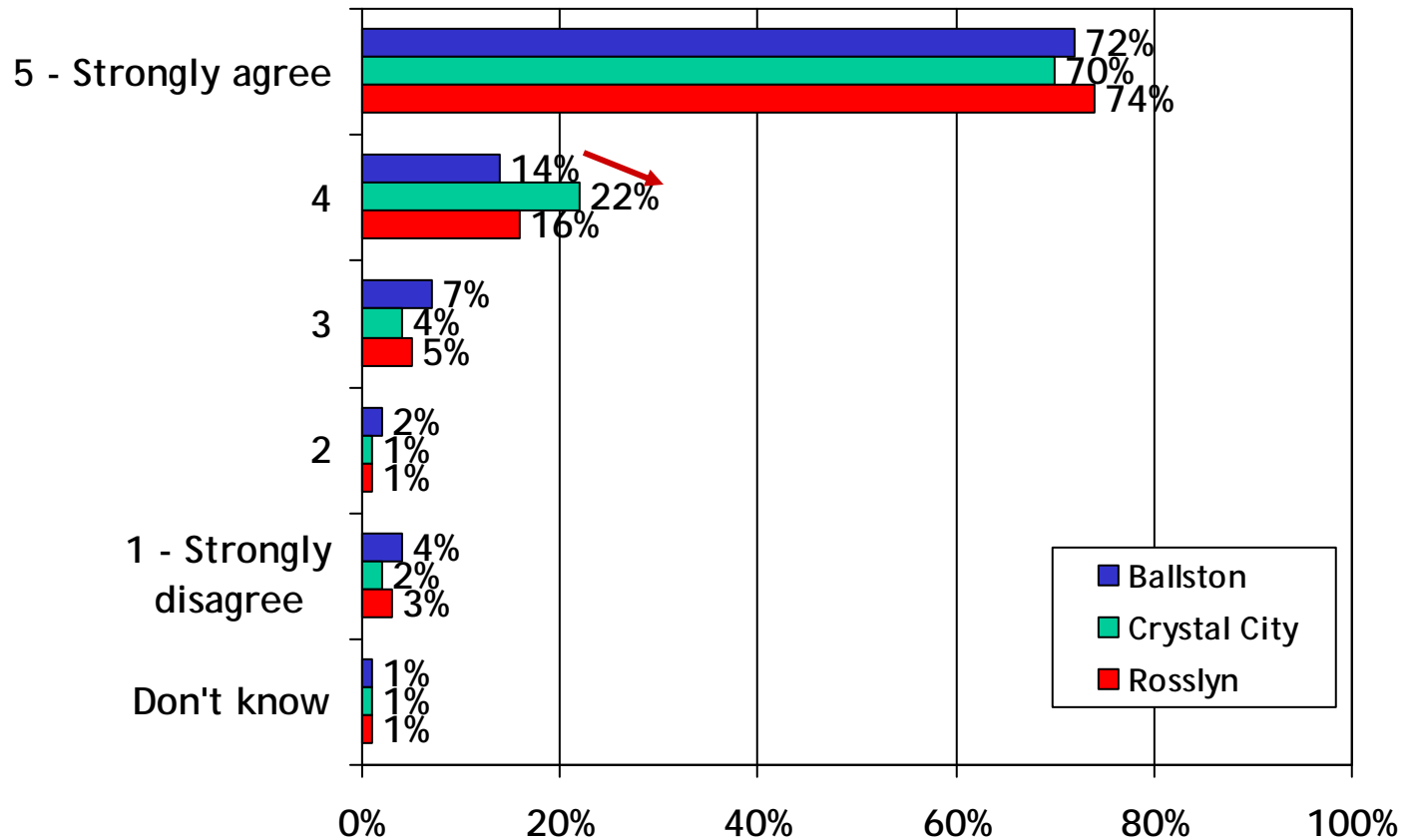
“It is a pleasant store to shop.”

MEANS:

Ballston - 4.5

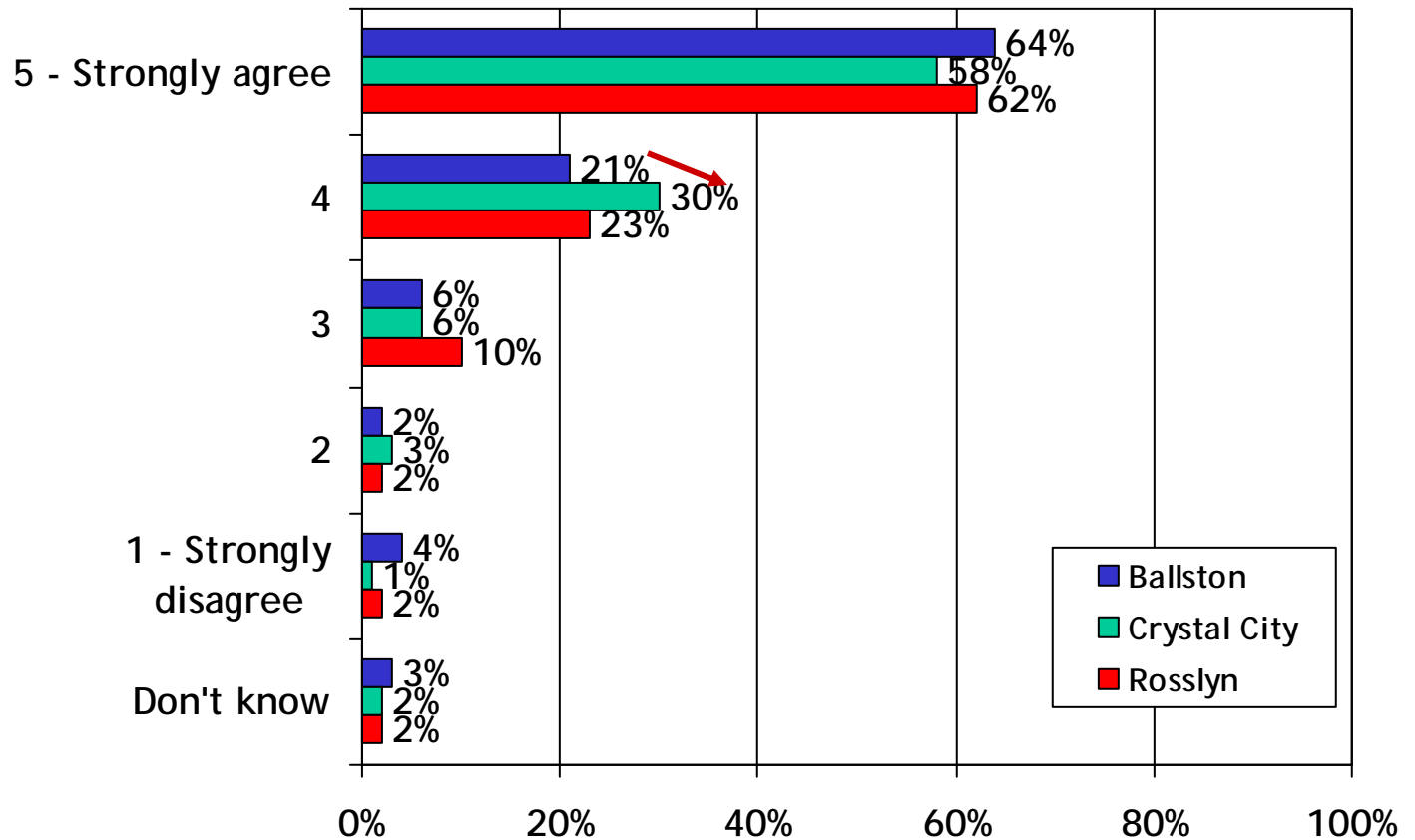
Crystal City -  
4.6

Rosslyn - 4.6



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

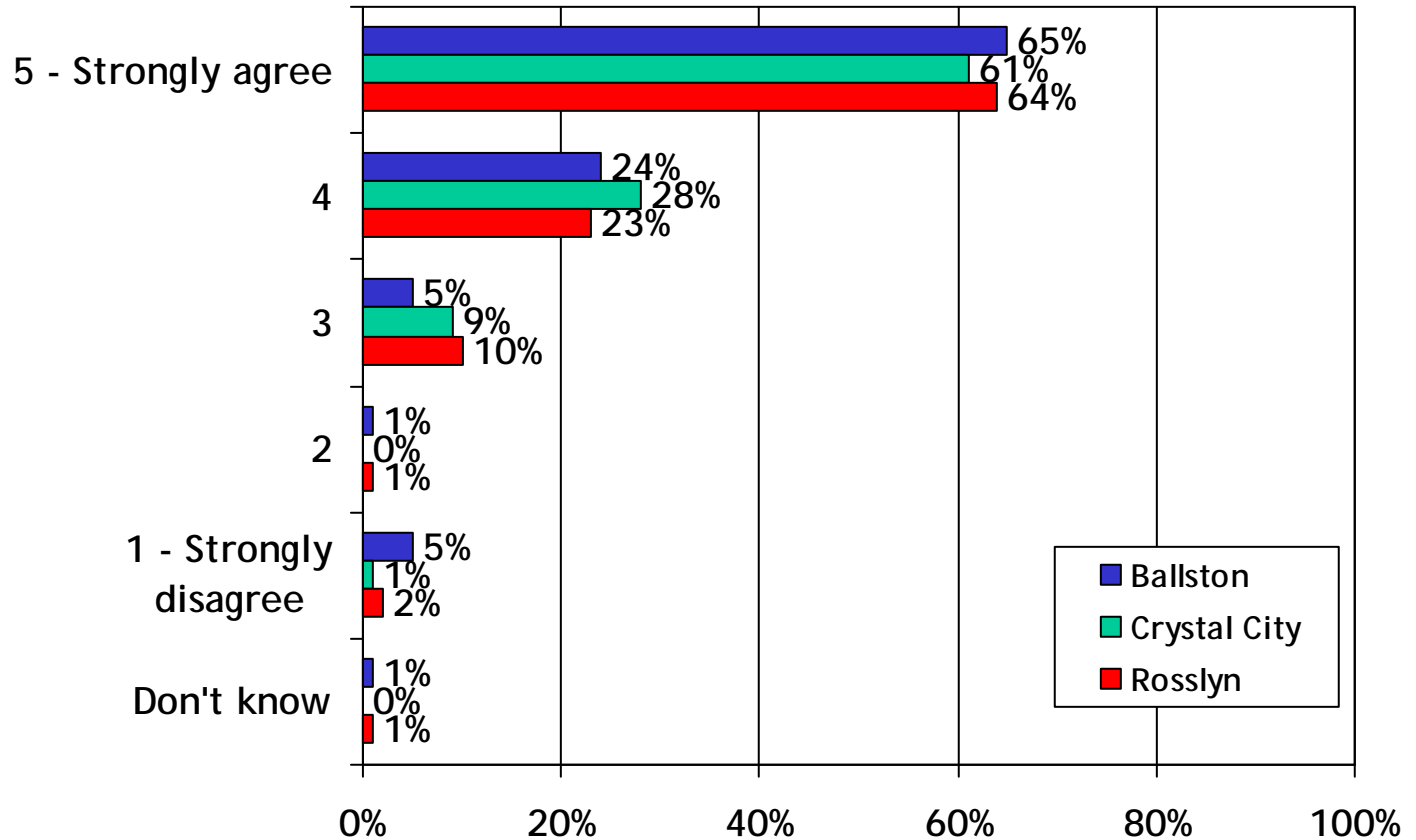
# "The sound level is about right."



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

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

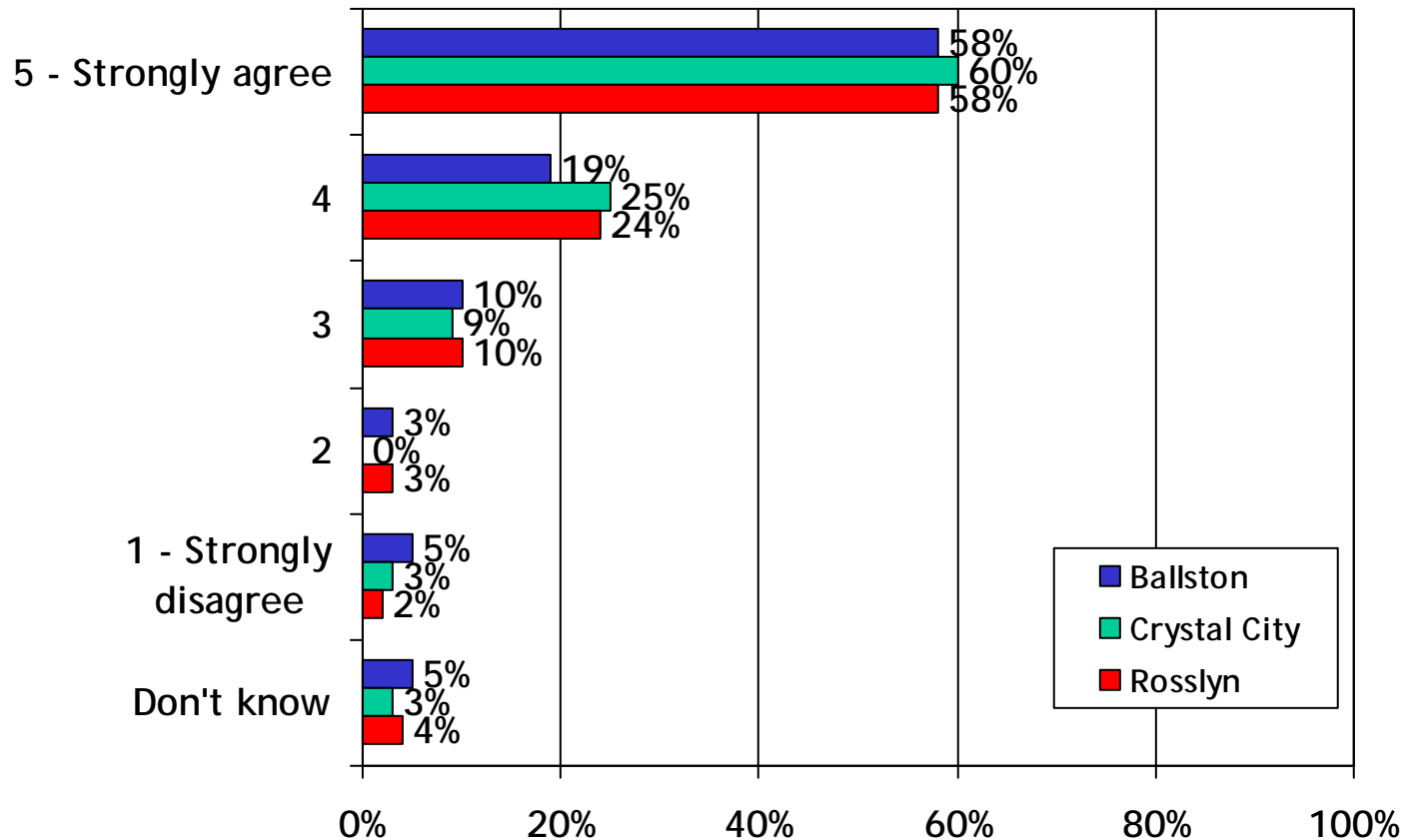
# "The lighting is about right."



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

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

# "The store hours are convenient for my schedule."



## MEANS:

Ballston - 4.3

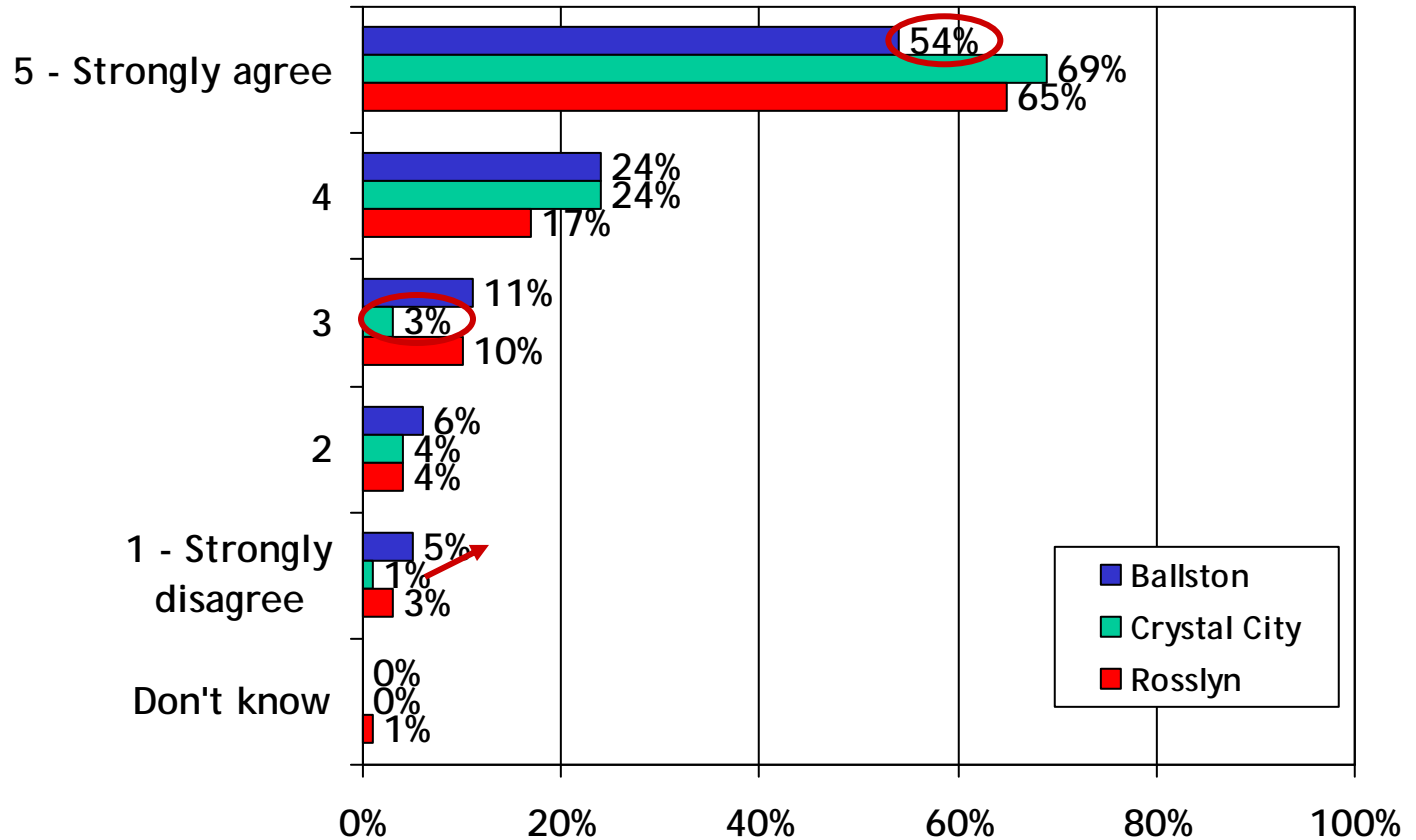
Crystal City - 4.4

Rosslyn - 4.4

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

# "The store is easy to find."

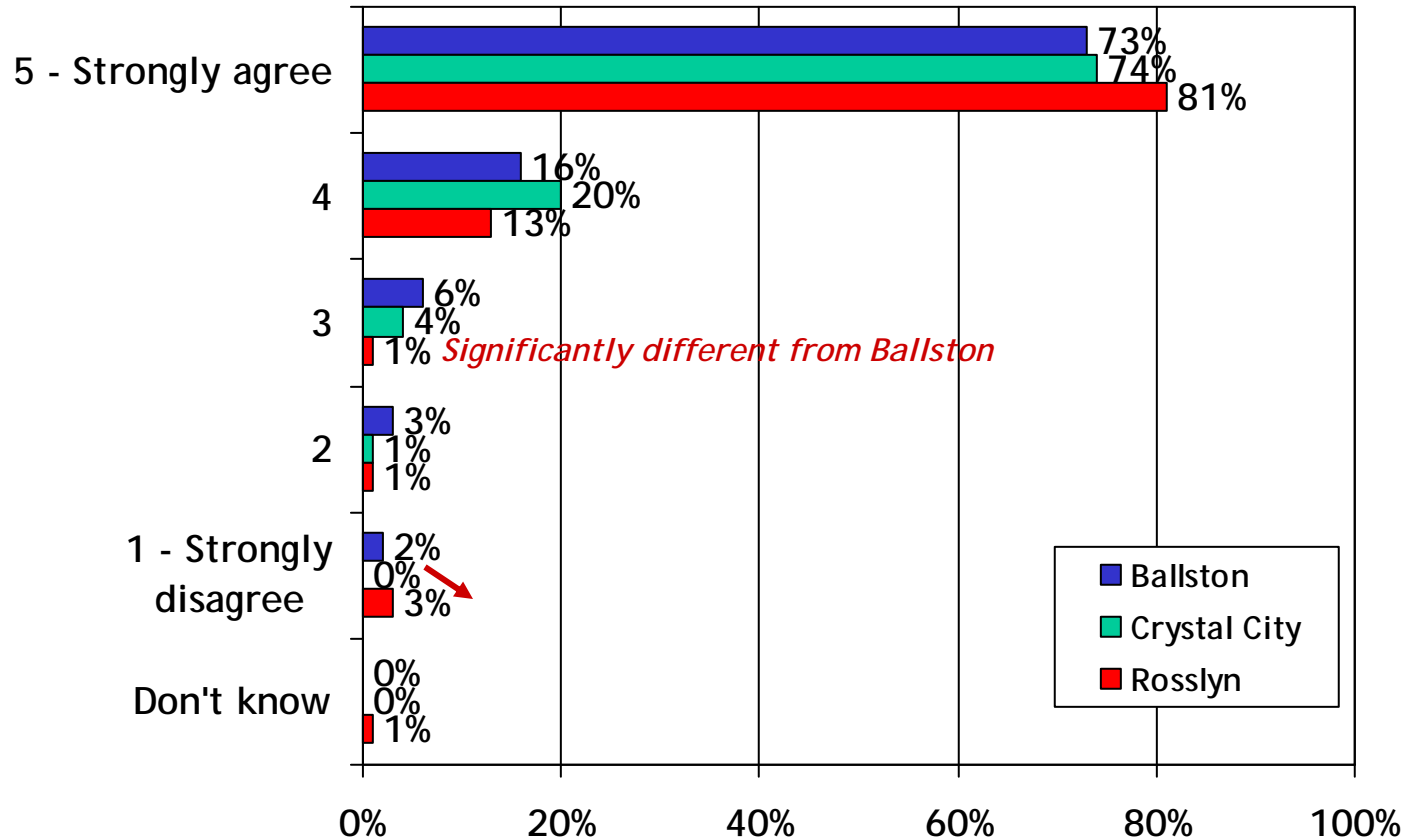
**MEANS:**  
 Ballston - 4.1  
 Crystal City - 4.5  
 Rosslyn - 4.4



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

# "The staff is professional."

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

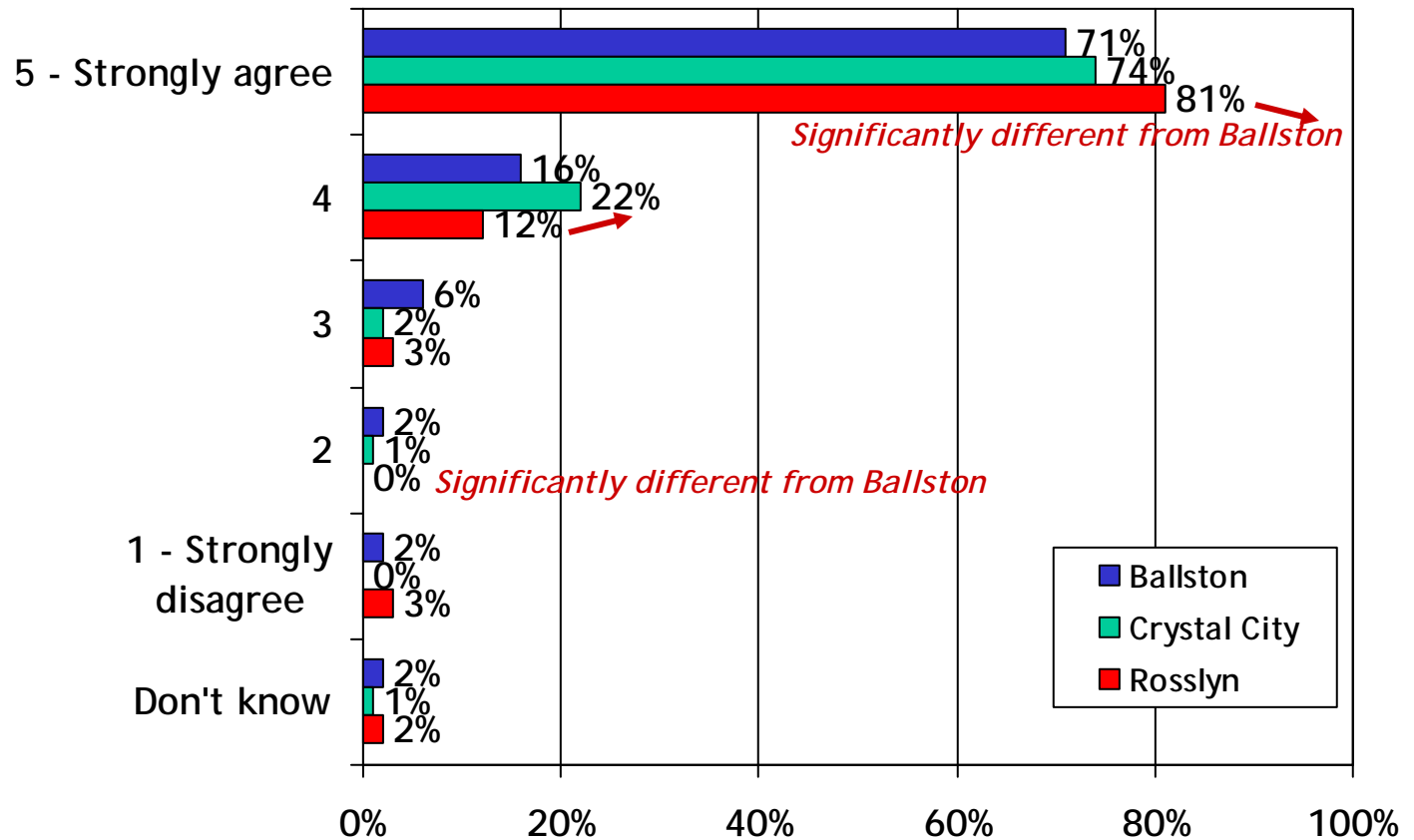


Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?



“The staff is knowledgeable about products and information provided.”

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

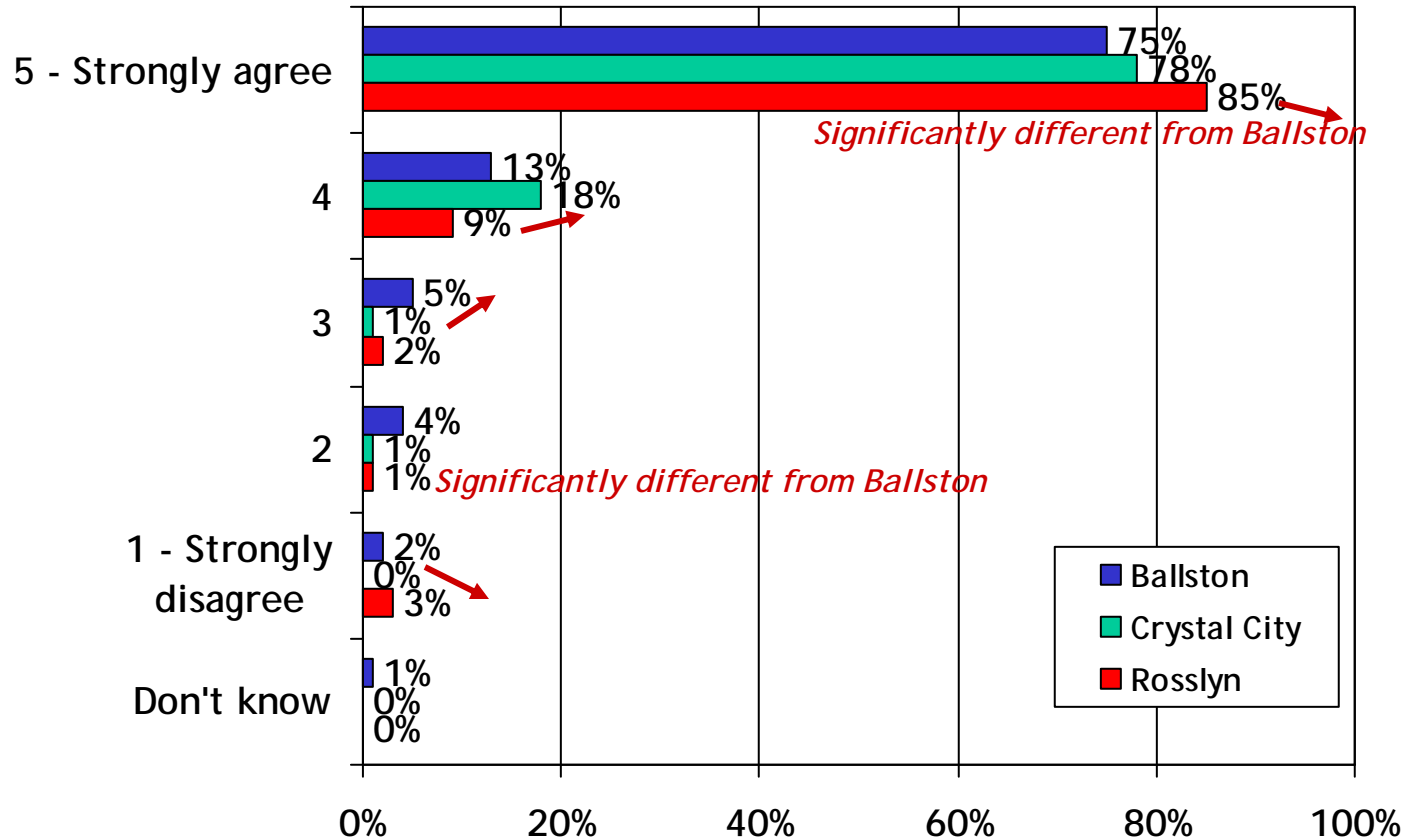


Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?



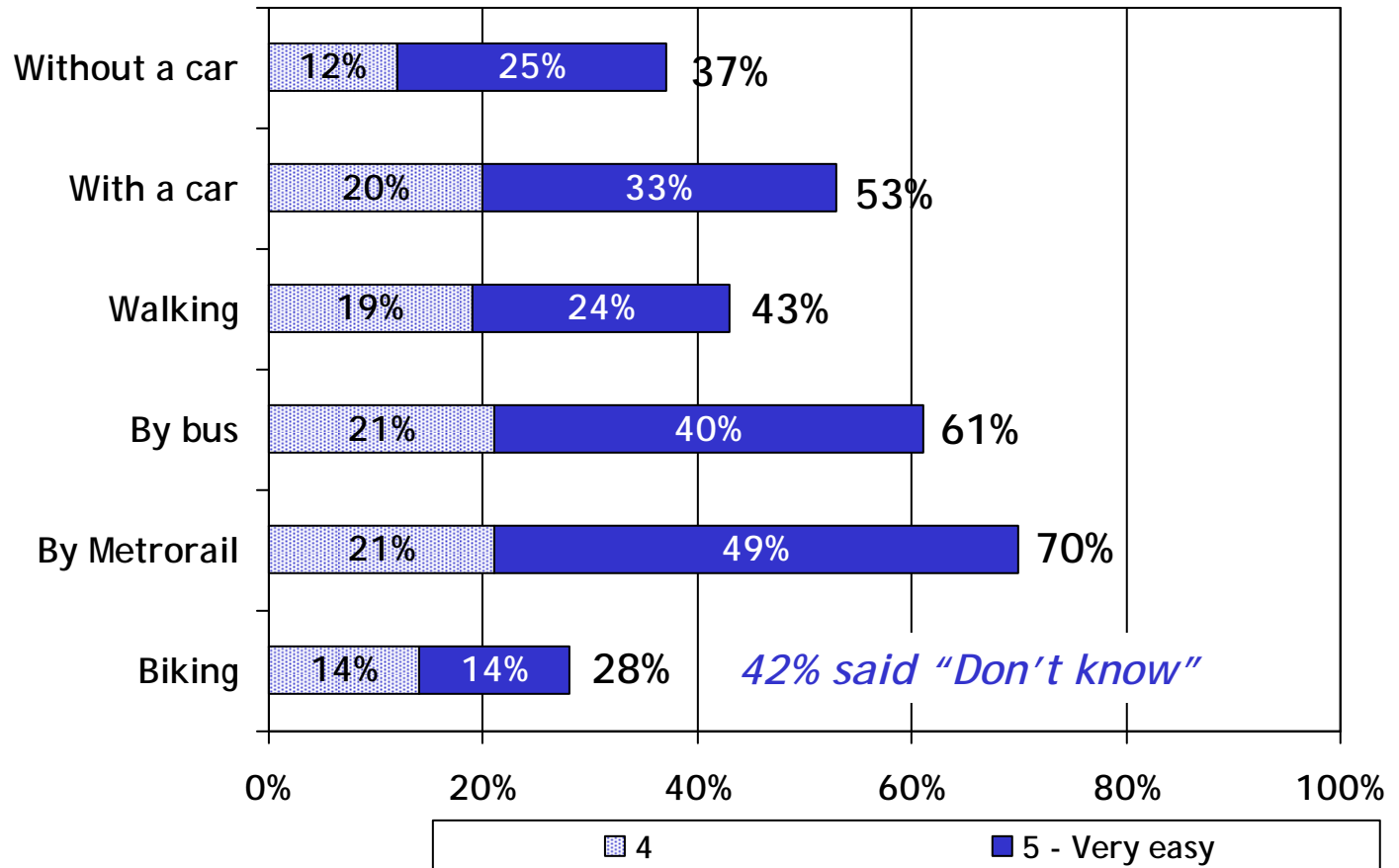
# "The staff is helpful."

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



Q15a-c: Next, think about the customer service in the Store. Do you agree with the following statements regarding the staff in this particular Commuter Store?

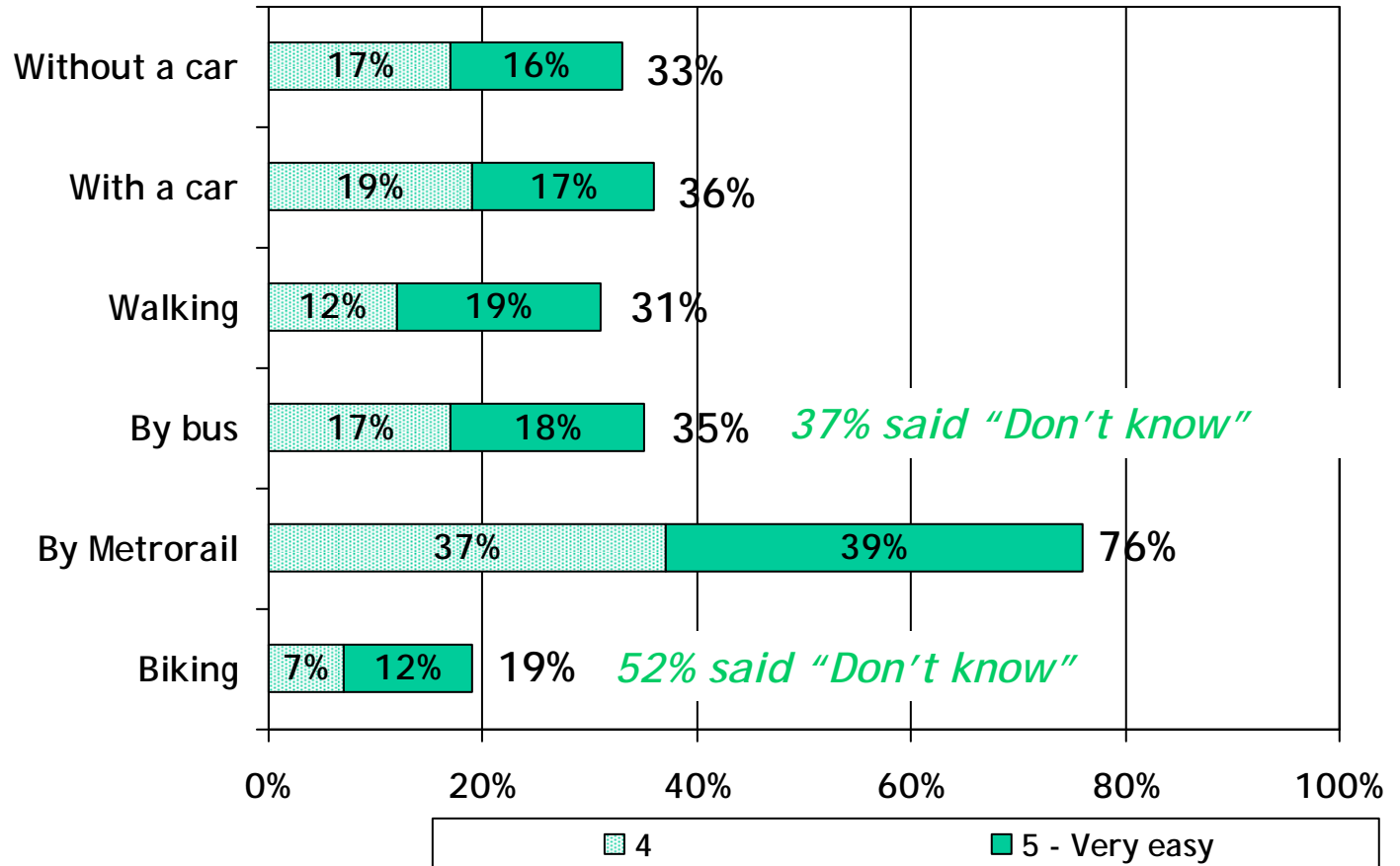
# 70% of Ballston Customers Find it Easy to Get Around Arlington by Metrorail



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

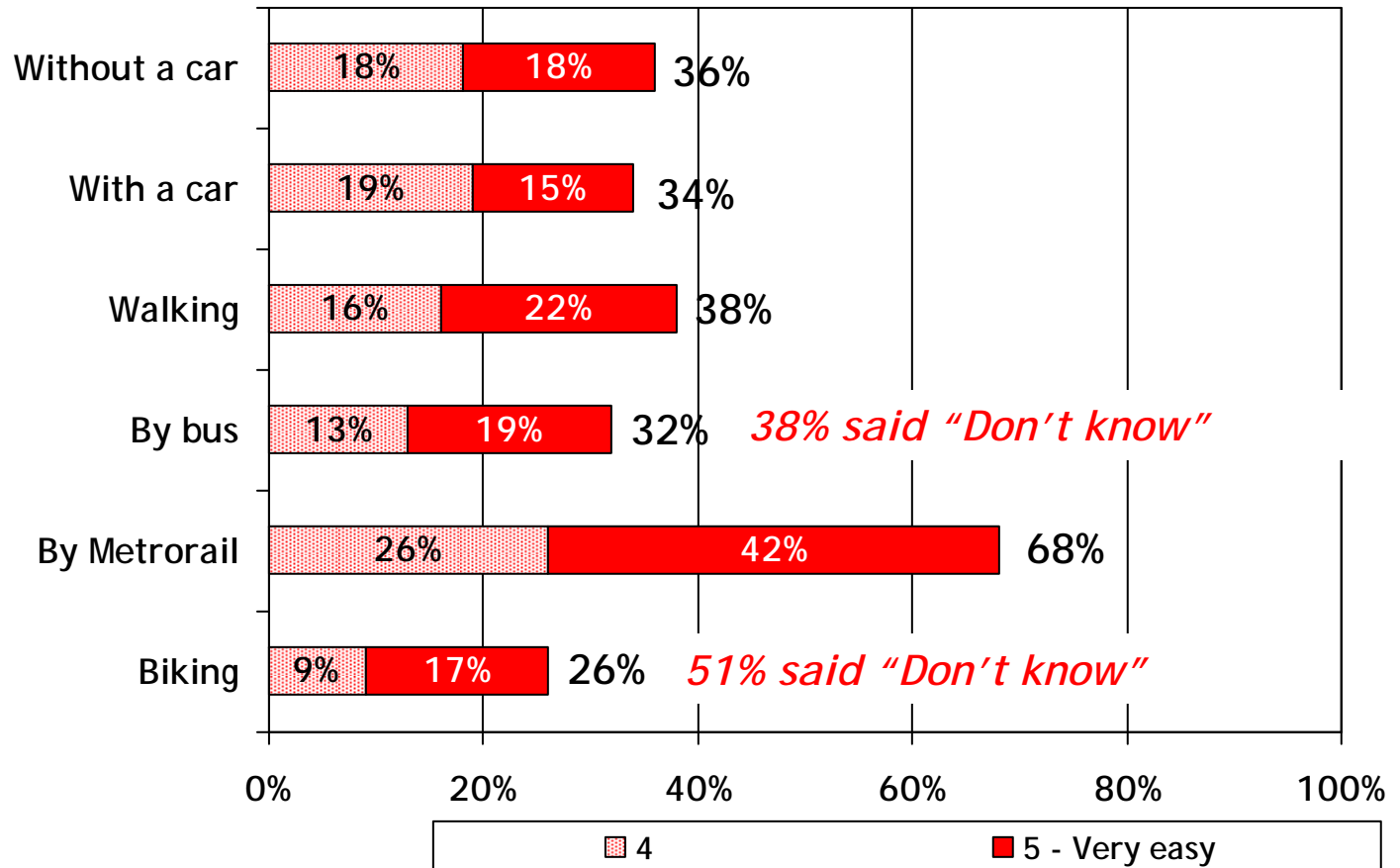
# 76% of Crystal City Customers Find it Easy to Get Around Arlington by Metrorail

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



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

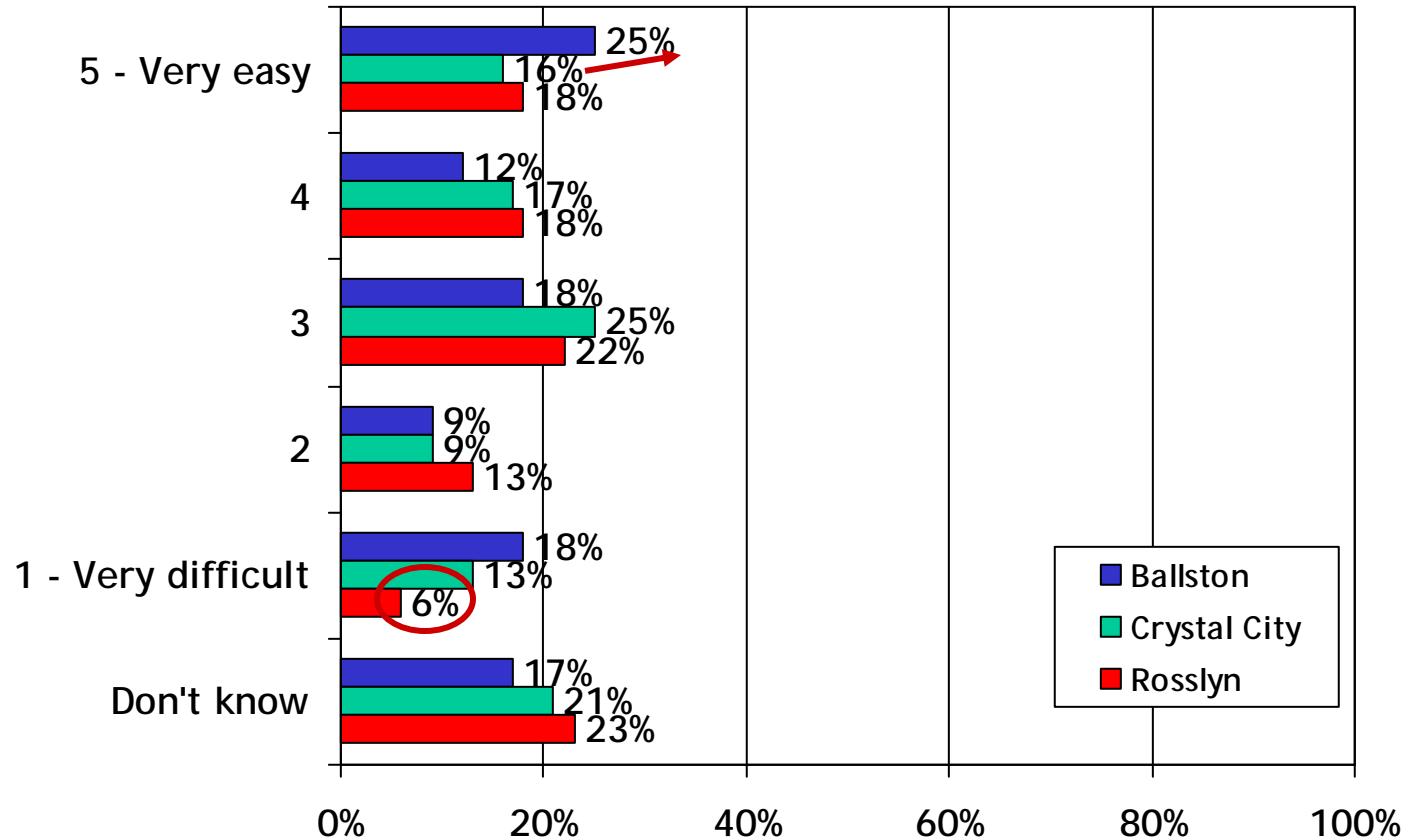
# 68% of Rosslyn Customers Find it Easy to Get Around Arlington by Metrorail But Most Do Not Find It Easy to Get Around By Other Methods



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

# “Without a car, SUV, van, or truck?”

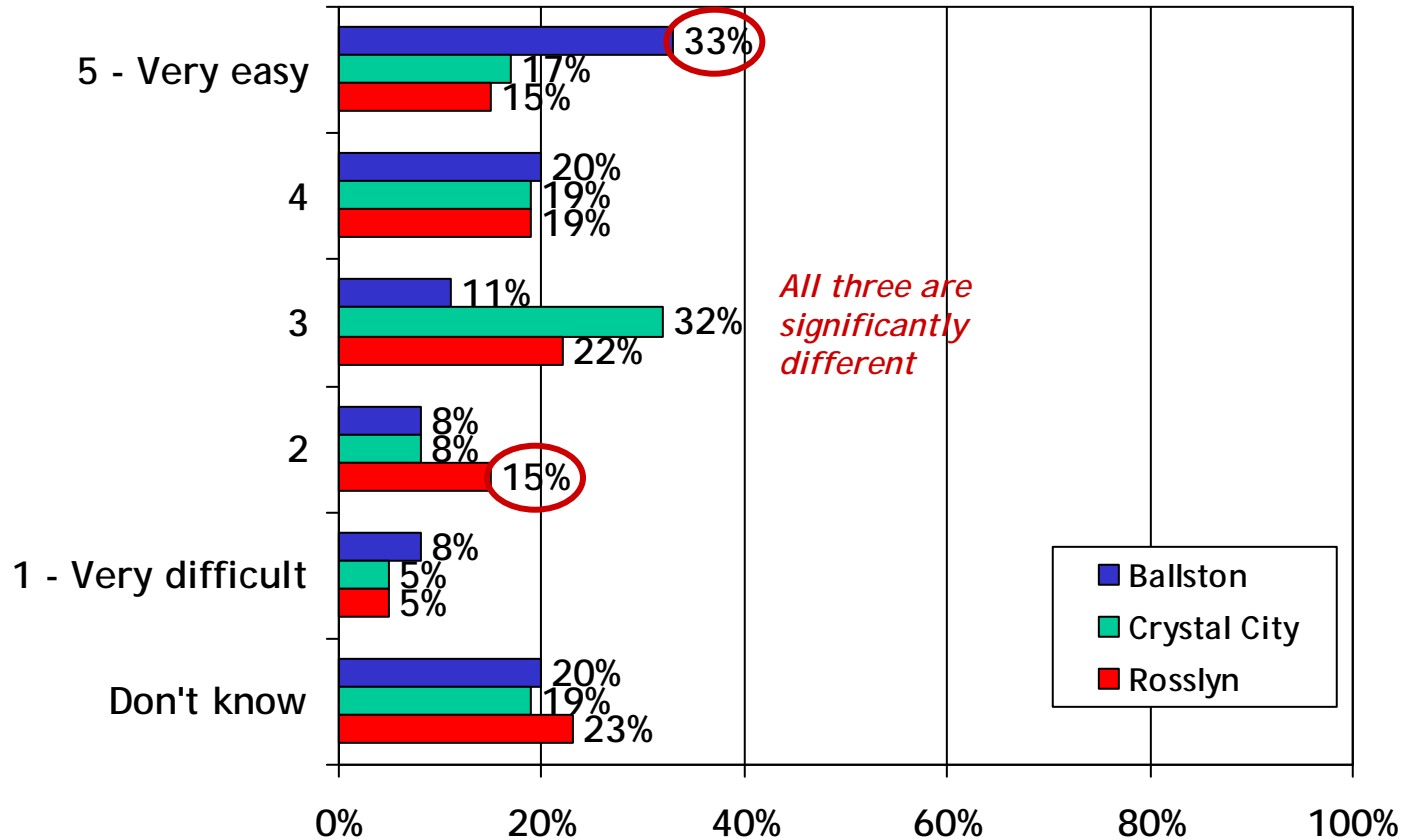
**MEANS:**  
 Ballston - 3.2  
 Crystal City - 3.2  
 Rosslyn - 3.4



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

# "With a car, SUV, van or truck?"

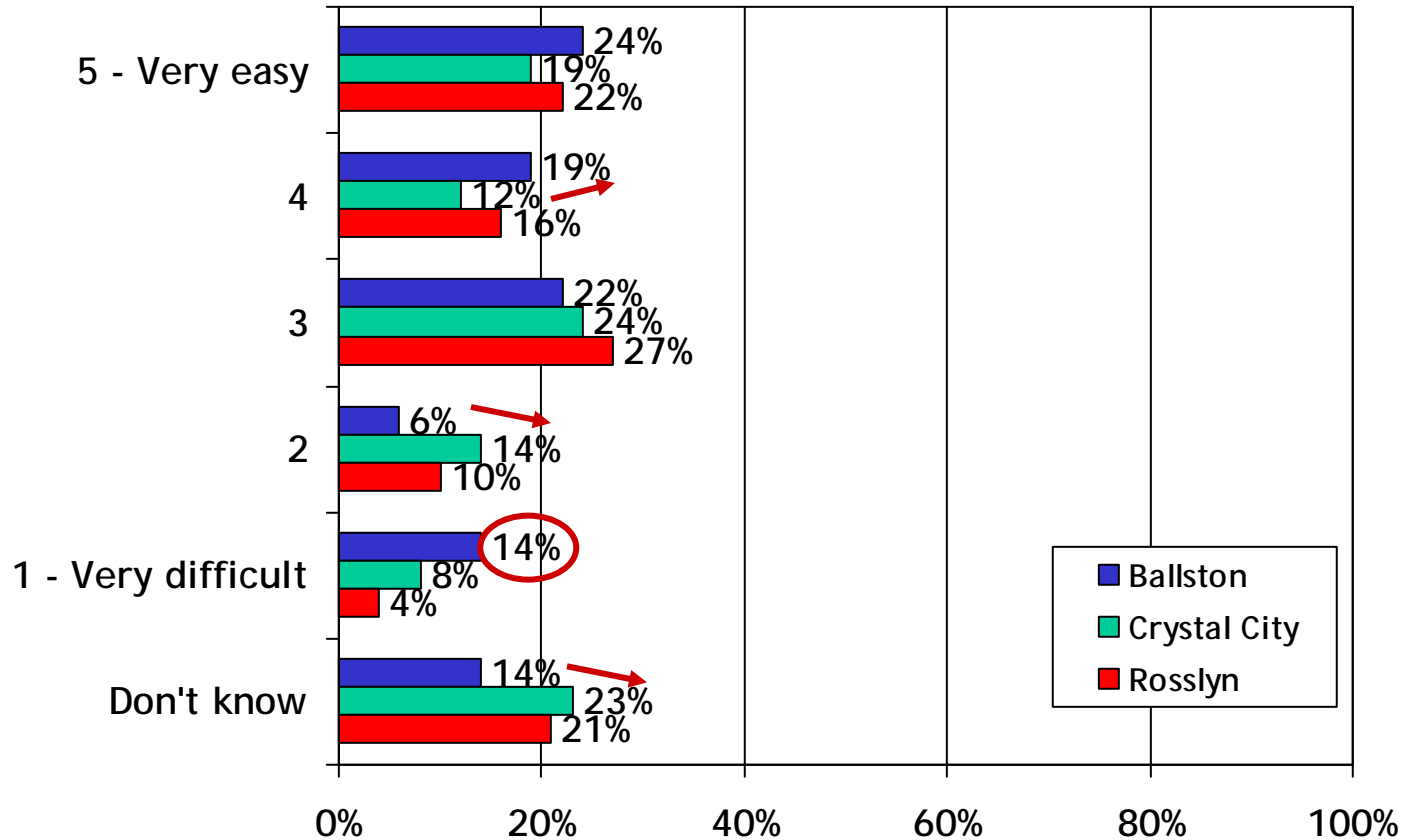
**MEANS:**  
 Ballston - 3.8  
 Crystal City - 3.4  
 Rosslyn - 3.3



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

# "By walking?"

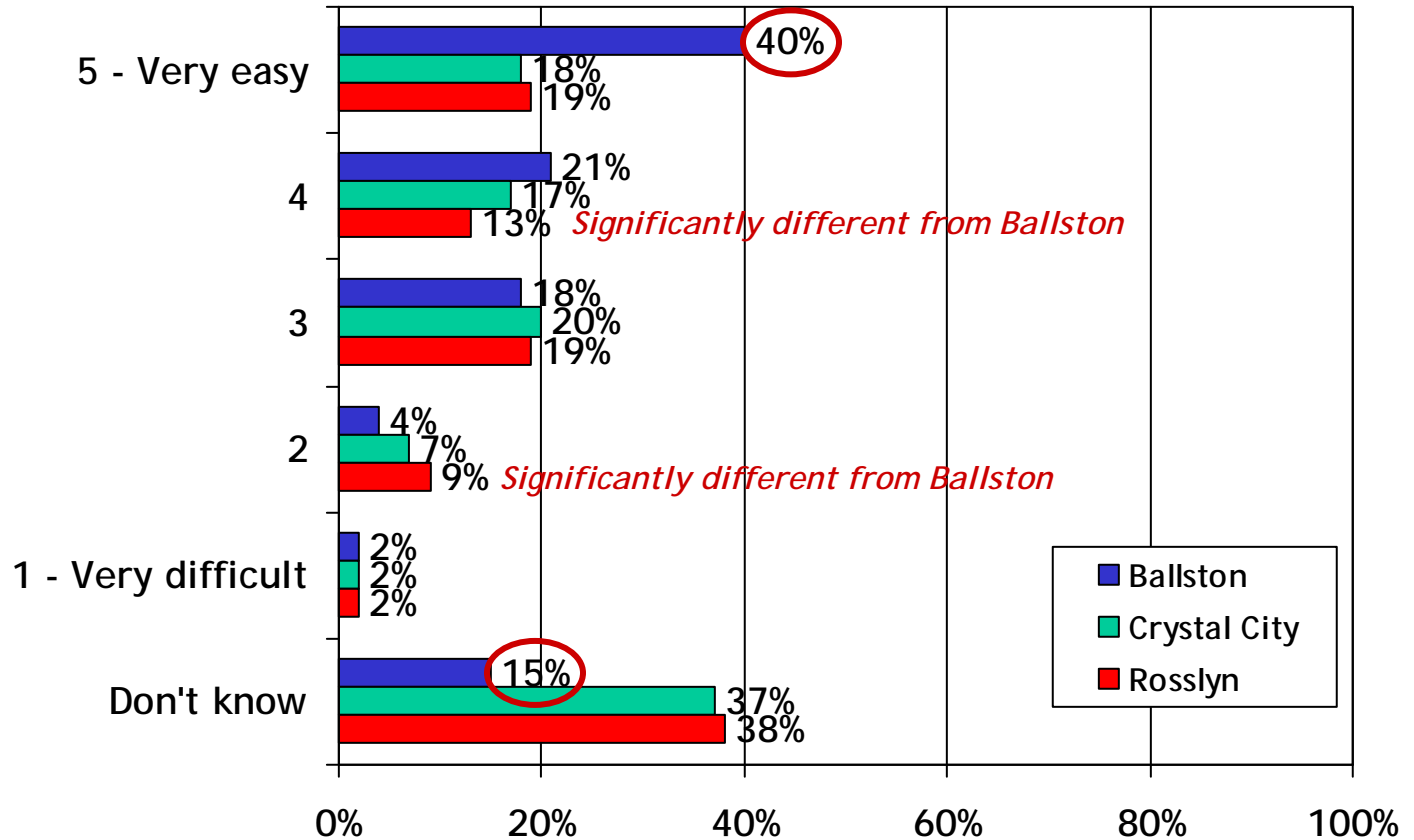
**MEANS:**  
 Ballston - 3.4  
 Crystal City - 3.3  
 Rosslyn - 3.5



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

# "By bus?"

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

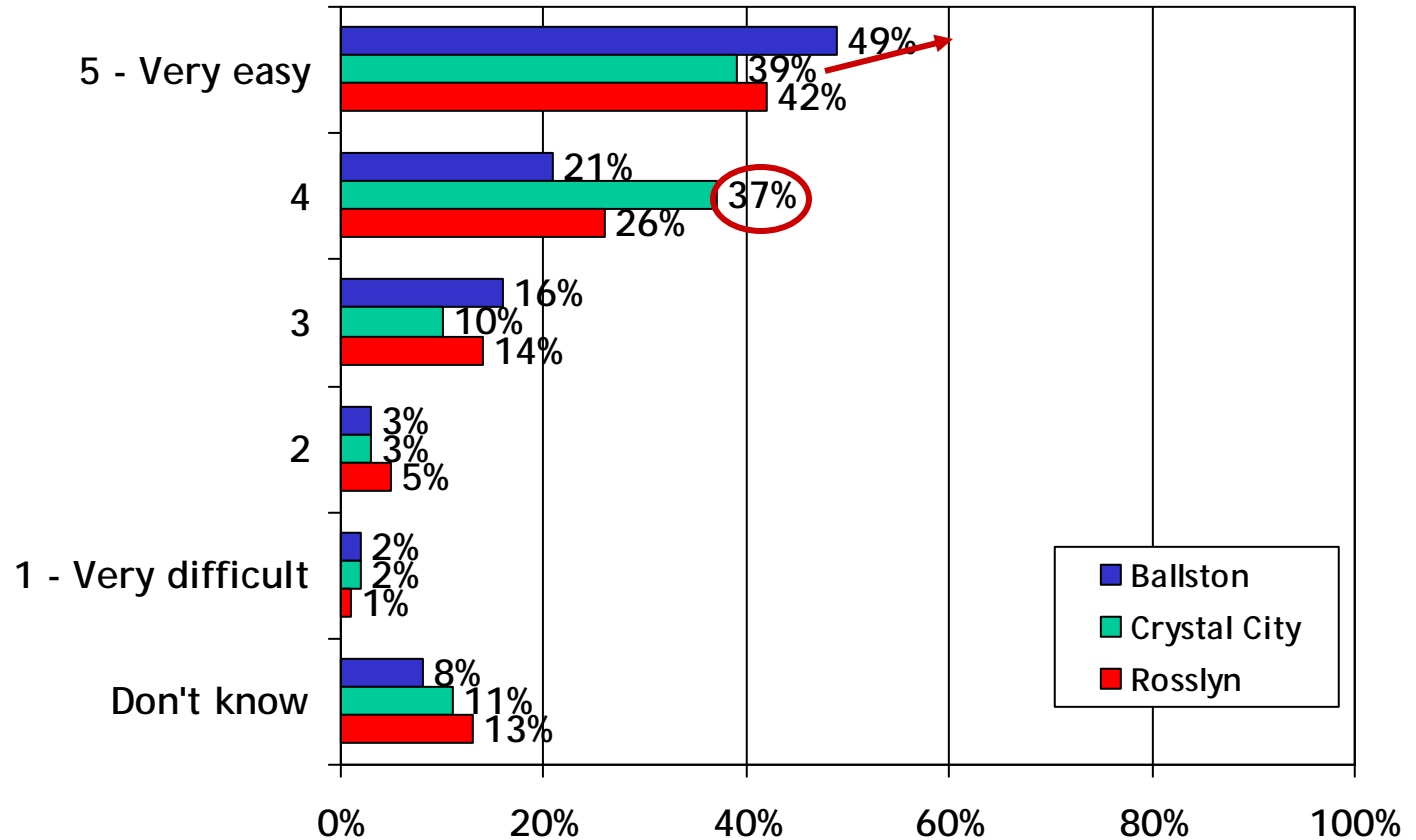


Q19a-f: Now, please indicate how difficult or easy you think it is to get around Arlington County under the six scenarios shown below.



# "By Metrorail?"

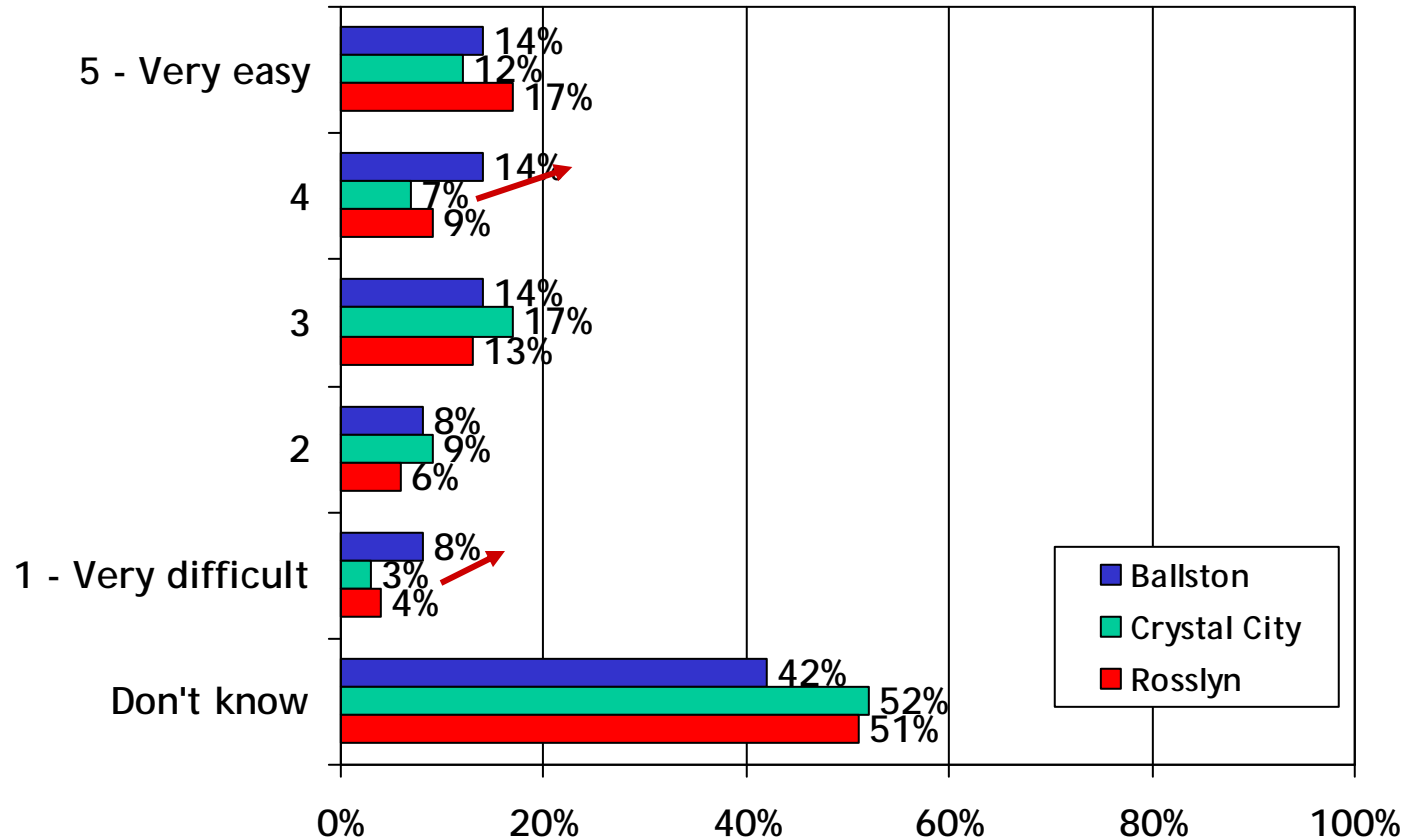
**MEANS:**  
 Ballston - 4.2  
 Crystal City - 4.2  
 Rosslyn - 4.2



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

# "By bicycle?"

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



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