

## **2007 Arlington Business Leaders Study**

### **SPONSOR:**

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### **OVERALL STUDY PURPOSE:**

- ☞ Assess the importance and impact of the transportation system and transportation support services in making Arlington County an attractive business location.
- ☞ Identify opportunities for enhancing impact of transportation support services.
- ☞ Establish benchmarks against which performance gains can be measured.

### **OBJECTIVES OF RESEARCH:**

- ☞ Understand the role the transportation system plays in the overall perception of Arlington as a business location and its importance in location decision-making.
- ☞ Identify the perceived needs and priorities of the business community as it relates to transportation.
- ☞ Gauge awareness, participation, and interest in employer-based transportation benefits programs.
- ☞ Evaluate the performance of ACCS and Arlington Transportation Partners (ATP) and their programs in meeting needs.
- ☞ Determine unmet needs and service opportunity areas.

## **METHODOLOGY:**

|                            |   |
|----------------------------|---|
| Mode of Data Collection    | 12-minute Self-Administered Survey<br>- Invitation letter with survey sent to 842 Arlington Business Leaders signed by Jerry Norris; follow-up phone calls and emails |
| Survey Instrument          | Option to complete online, mail-in, or call-in  |
| Survey dates               | June/July, 2007   |
| Survey Population          | - 842 senior level business leaders identified by Arlington Economic Development supplemented with ATP client/prospect list<br>- 672 with valid contact information   |
| Criteria for Participation | Invitation - Senior Managers and above<br>Must be have at least one business location in Arlington County   |
| Completed Surveys          | 120 Respondents:<br>- 61% online, 39% mail<br>Mix of small and large companies, distributed throughout the Arlington County   |

## **KEY FINDINGS:**

### **Rating of Arlington County as Business Location**

- ☞ 87% of business leaders rate Arlington favorably (top 2 box) as a place to locate a business.
- ☞ Access to transit and location dominate reasons behind favorable ratings.
- ☞ Quality of Transportation System rated highest (92% rate favorably) among all factors influencing location decisions.

### **Performance Rating/Satisfaction with Arlington Transportation System**

- ☞ Business leaders believe Arlington County performs well in delivering a quality transportation system (79% rate favorably). Only "Area Reputation" received a higher delivery rating and that by a small margin.
- ☞ 62% of Arlington business leaders are satisfied or very satisfied with the Arlington transportation system. By comparison, 51% are satisfied or very satisfied with the transportation system for the DC metropolitan area.
- ☞ Business leaders report that the transportation system delivers many important benefits to their businesses, led by improved recruitment, access to customers, employee attendance and employee retention.
- ☞ Those business leaders who rate the transportation system more highly also give the county higher ratings as a business location.
- ☞ When asked to allocate \$100 across three parts of Arlington County's Transportation System (infrastructure – roads, infrastructure – bus, bike paths, walking paths, etc., services), Business Leaders allocated an average of \$27 to alternative mode infrastructure (bus, bike, etc.), and \$19 to transportation assistance services - information-based support services that help travelers maximize transit use, bicycling, walking, carpooling, and so forth.

## **Participation/Interest in Employer-Based Benefits Programs**

- ☞ More than half the companies represented offer flexible work schedules, transit information, and teleworking opportunities. 83% offer at least one benefit/service.
- ☞ Among those companies who do not offer these services currently, a significant percentage is willing to consider offering one or more transportation benefit programs to employees.
- ☞ More than half would consider offering services such as transit information, transit schedules, SmarTrip cards, guaranteed ride home, and bike racks/lockers.
- ☞ Those who offer benefits programs see a positive impact in terms of recruitment, morale, retention, reduced absenteeism, and other factors.
- ☞ Companies offering greater numbers of programs report more benefits being accrued to their companies and also give the county higher ratings overall as a business location.

## **Awareness and Use of Transportation Support Services**

- ☞ Business leaders report high levels of awareness and familiarity with the transportation support services offered by Arlington County.
- ☞ Relatively few respondents were able to correctly identify ACCS or ATP as the organization providing those services.
- ☞ Nearly half of the respondents had aided awareness of ATP.
- ☞ Although sample base on the question is small, 50% of business leaders indicated they would not have implemented their benefit programs without ATP assistance. This finding is consistent with results in ATP Client survey.

## **OTHER RELATED STUDIES, PLANS & DOCUMENTS:**

2006 – 2008 Arlington County Commuter Services (ACCS) Research and Evaluation Plan  
2007 Arlington Transportation Partners Client Study  
2006 Arlington County Residents Satisfaction Telephone Study

## **AVAILABLE DOCUMENTS:**

|                                      |
|--------------------------------------|
| Questionnaire                        |
| Data Tables                          |
| PowerPoint Presentation Final Report |

## **KEY WORDS:**

ACCS, Arlington County, Arlington County Commuter Services, Arlington Transportation Partners, ATP, ATP Employer Services, Attitudes, Awareness, Commuter assistance services, Demographics, Employer Services, Perceptions, Satisfaction, Services, TDM, TDM Planning and Administration, Transportation Demand Management, Transportation Needs, Transportation Options, Transportation System, Workplace