How Business Benefits from Arlington County’s Multimodal Transportation System

Insights from the ACCS 2012 Business Leaders Study

presented April 30, 2013

John Martin, Southeastern Institute of Research
Mobility Lab supports Arlington County transportation research.

Mobility Lab shares stories, stats and solutions from the real world for transportation options that are cool, healthy, fun and efficient.

We are a research-and-development initiative of Arlington County Commuter Services in Virginia, USA, and we collaborate worldwide.
Mobility Lab Research
We are a “think tank,” and one of our advantages is that we communicate research findings based on our real, daily in-house work within a huge, metropolitan region-wide program; with hundreds of thousands of customers; and with innovative mobility-management partners like BikeArlington, WalkArlington, Capital Bikeshare, Arlington Transportation Partners, goDCgo, The Commuter Stores®, and many others. We provide original research with statistics that can back up your case for how and why “mobility management” improves communities.

Mobility Lab & Partner Research
Arlington County, Virginia created Mobility Lab to tell the world about all the research we’ve done in regards to how to move people, not cars. This is our research about Arlington but also about many other places we’ve studied worldwide.

Other Important Mobility Research
Mobility Lab recognizes that others around the world have produced excellent research about how to help decrease traffic but improve transportation options. Here is where you’ll find some of the best of the research out there.

Categories that Overlap with Mobility Research
Select Tag

Explore Other Research Sites
AASHTO Daily Transportation Update
Allinx – European Community for Mobility
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Research Notes

Two Important Definitions

Top Two Box
• In research, we often ask people to give a rating from 1 to 5, with 5 being the highest (best, most important, etc.).
• Then we report the “Top Two Box” score – the percent giving a rating of 4 or 5.

Sample Size
• This is the number of respondents for any given question, shown on each slide in the bottom left hand side.
When your business considered alternative locations for locating your business or part of your business, how important were each of these attributes in the decision process?
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We All Hear Great Things About Arlington County’s Transportation System
“The transportation system in Arlington is excellent.”

“I think Arlington County has the best transportation system in the greater Washington, DC area.”

Business Leaders
But...

What Difference Does Our Transportation System Really Make?
2012 ACCS Business Leaders Study

- Conducted by the Southeastern Institute of Research, Inc. and LDA Consulting.

- Survey respondents were invited by email by the Arlington Department of Environmental Services, Division of Transportation & Development.

- A 15-minute online survey was conducted in the fall of 2012.

- 212 senior level business executives, HR professionals and developers participated.

- Margin of error is ±6.5 percentage points at the 95% confidence level.

- Comparison to 2007 Study findings is possible on some measures.
What Impact Does Our Transportation System Have on Arlington County as a Business Location?
Business Leaders Rate Arlington County As a Great Business Location
How would you rate the overall business climate in Arlington County?
73% of Arlington County Business Leaders rate Arlington County a 4 or 5 on a 5-point scale, where 5 means “Excellent,” and the majority rate it better than other areas.
How does the overall business climate in Arlington County compare to the overall business climate in other areas?
The Majority of Business Leaders Rate Arlington County’s Business Climate Better Than Other Areas

Compared to:

Other areas in the Greater Washington region

The United States

45% 13% 58%
46% 24% 70%

4 - Overall climate in Arlington is much better
5 - Overall climate in

How does the overall business climate in Arlington County compare to the overall business climate in:
Business Leaders Say the Transportation System Plays a Key Role in Making Arlington County a Great Business Location
Why did you give Arlington County that rating for overall business climate?
Arlington County is a Great Place for Business
In 2007, the County Was Highly Rated for Access to Transportation & Major Highways

- Access to transportation & major highways: 40%
- Great location: 31%
- Close to D.C.: 20%
- Amenities in the area: 17%
- Proximity to customers: 12%

Why did you give Arlington County that rating?
In 2012, Arlington County is still highly rated for accessibility & transportation.

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

Why did you give Arlington County that rating?
When your organization considered alternative locations for your business, how important were each of these attributes?
A quality transportation system is the most important consideration when making the decision of where to locate a business.

Other important considerations include availability of parking, reputation of the area, and availability of a skilled workforce.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>1%</th>
<th>2%</th>
<th>3%</th>
<th>4%</th>
<th>5%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of transportation system</td>
<td>25%</td>
<td>61%</td>
<td>86%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of parking</td>
<td>26%</td>
<td>53%</td>
<td>79%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reputation of area</td>
<td>33%</td>
<td>44%</td>
<td>77%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Available skilled workforce</td>
<td>26%</td>
<td>50%</td>
<td>76%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pro-business climate</td>
<td>28%</td>
<td>46%</td>
<td>74%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proximity to customers</td>
<td>19%</td>
<td>49%</td>
<td>68%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of business support services</td>
<td>33%</td>
<td>26%</td>
<td>59%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax structure/incentives</td>
<td>17%</td>
<td>34%</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

When your business considered alternative locations for locating your business or part of your business, how important were each of these attributes in the decision process?
Please rate Arlington County’s performance delivering on these attributes.
A Quality Transportation System is the single most important consideration in deciding where to locate a business.

When your organization considered alternative locations for your business, how important are each of these attributes? Please rate Arlington County’s performance delivering on these attributes.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Importance n = 156</th>
<th>Performance n = 177</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of transportation system</td>
<td>86%</td>
<td>73%</td>
</tr>
<tr>
<td>Availability of parking</td>
<td>79%</td>
<td></td>
</tr>
<tr>
<td>Reputation of area</td>
<td>77%</td>
<td></td>
</tr>
<tr>
<td>Availability of skilled workforce</td>
<td>76%</td>
<td></td>
</tr>
<tr>
<td>Pro-business climate</td>
<td>74%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>77%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>76%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>74%</td>
<td></td>
</tr>
</tbody>
</table>
What Is the Most Important Consideration for Starting, Expanding or Relocating a Business?
What is the single most important attribute in selecting a location to start, relocate or expand your business?
In 2007, Proximity and Accessible Transportation Were the Most Important Attributes in Locating a Business

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proximity to customers</td>
<td>36%</td>
</tr>
<tr>
<td>Access to transportation/highways</td>
<td>17%</td>
</tr>
<tr>
<td>Location</td>
<td>8%</td>
</tr>
<tr>
<td>Cost/Affordability</td>
<td>8%</td>
</tr>
<tr>
<td>Quality of workforce</td>
<td>6%</td>
</tr>
<tr>
<td>Affordable office space</td>
<td>5%</td>
</tr>
<tr>
<td>Affordable housing</td>
<td>4%</td>
</tr>
</tbody>
</table>

Over half (53%) of Business Leaders named transportation accessibility and proximity as the most important attributes in selecting a business location.

What is the single most important attribute in selecting a location to relocate your business?
In 2012, Transportation and Accessibility Are the Most Important Attributes in Locating a Business Location

What is the single most important attribute in selecting a location to start, relocate or expand your business?

- Access to customers: 24%
- Affordability/costs: 18%
- Transportation access: 12%
- Location: 10%
- Good business environment: 7%
- Workforce: 5%
- Unspecified accessibility: 2%
- Other responses: 16%
- None: 7%

38% of Business Leaders named transportation and accessibility as the most important attributes in selecting a business location.

n = 130
C-Level Business Leaders
“Arlington County offers everything one needs – food establishments, amenities and transportation options.”

Business Leader
Arlington County Business Leaders See Direct, Bottom-line Benefits from the County’s Transportation System
In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization’s ability to conduct business?
In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization’s ability to conduct business?
6 of 8 hotels indicated that transportation affects their ability to attract guests.

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

In what ways and to what extent does the quality of the transportation system in Arlington County affect your organization’s ability to conduct business?
Ways That a Transportation System Can Affect Development

Developers who agree that transportation services and improvements be funded by:
- Residential property tax – 25%
  (8 developers)
- Commercial property tax – 50%
  (17 developers)

In what ways and to what extent does the quality of the transportation system affect your (residential, commercial) properties?

Developers (n = 35)
R: Residential
C: Commercial

1. Ability to attract tenants, R 43% C 39%
   38% 67%
   81%

2. Ability to retain tenants, R 48% C 39%
   33% 67%
   81%

3. Ability to charge particular rent, R 52% C 56%
   29% 17%
   73%

4. Reputation of the property, R 52% C 44%
   14% 61%
   66%

5. Property operations, R 43% C 28%
   19% 45%
   62%

6. Ability to hire/retain property management, R 43% C 44%
   5% 11%
   48% 55%
   81%

0 0.2 0.4 0.6 0.8 1

4 5 - Very important

ARLINGTON VIRGINIA
DEPARTMENT OF ENVIRONMENTAL SERVICES
Arlington County Commuter Services
The Bottom Line Is That the County’s Transportation System Affects the Bottom Line
Arlington County’s Business Leaders Say “Transportation Options” Are the Best Part of the Transportation System
Overall, how would you rate Arlington County on each of the following?
The majority of developers and business leaders alike consider Arlington County to have access to multiple transportation options.

Overall, how would you rate Arlington County on each of the following?
Developers consider Arlington County to have access to multiple transportation options.

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

**Access to transportation options (D only, n = 35)**
- 49% rated it 4
- 26% rated it 5 - Excellent
- 75% rated it 0-4

**Quality of transportation options (D only, n = 35)**
- 46% rated it 4
- 9% rated it 5 - Excellent
- 55% rated it 0-4
“We have a great bus and subway system, so we have 90% of our employees using public transportation.”

Business Leaders

“I am able to hire staff that rely on public transportation.”

Courtesy of Arlington Economic Development
Arlington County’s Business Leaders Have Few Concerns About the Transportation System
Thinking of your business in general, what is your greatest concern today related to your business as a whole?
Few Business Leaders Are Concerned About Arlington County’s Transportation System

Only 7% of Business Leaders consider transportation to be a concern in Arlington County.

Thinking of your business in general, what is your greatest concern today related to your business as a whole?
Arlington County Business Leaders Want Continued Investment in the County’s Transportation System
How do you predict each of the following will change in the next five years?
Arlington County’s Business Leaders Are Bullish on the Future

Business Leaders anticipate the quality of life and the business climate in the County will remain strong in the coming years.

How do you predict each of the following will change in the next five years? (note: D = Developers)

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

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

n = 191
Developers,
C-Level
Business Leaders
What Improvements Should Arlington County Make in Terms of Transportation?
Open-Ended Question
How important is it for the County to invest in each of the following?
While Arlington County currently has a world class transportation infrastructure in place, there is a clear perceived need among business leaders to maintain and constantly improve the systems to meet the growing community needs.

34 of the 35 Developers interviewed considered maintaining the transportation system to be top priority.

n = 191 Developers, C-Level Business Leaders

How important is it for the County to invest in each of the following?

- Improving the transportation system: 29%, 50%, 79%
- Developing and improving the technology infrastructure: 38%, 35%, 73%
- Attracting more private businesses: 34%, 37%, 71%
- Providing more parking: 29%, 36%, 65%
- Providing more affordable housing options: 21%, 30%, 51%
- Developing urban villages: 30%, 20%, 50%
- Attracting more government jobs: 24%, 24%, 48%
- Providing workforce training opportunities: 18%, 18%, 36%
“Continue connecting all forms of transportation, especially pedestrian and bikes.”

Business Leader
“Continue to fund Arlington Transportation Partners who do a lot to help bolster participation in public transportation as well as educating local businesses on services.”

Business Leader
Continued Investment in Supporting Employer Involvement in the County’s Transportation Program Will Produce Even Greater Results
There Is More Work Ahead

“One of the biggest future needs is dependable, timely, not overcrowded transportation for the high density of our live and work community.”

Business Leader
Of the following transportation information services and benefits programs, please indicate which are offered and which you would consider?
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<table>
<thead>
<tr>
<th>Service</th>
<th>Currently Available</th>
<th>Would Consider</th>
<th>% Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Showers</td>
<td>62%</td>
<td>7%</td>
<td>69%</td>
</tr>
<tr>
<td>Pre-tax transportation account</td>
<td>38%</td>
<td>23%</td>
<td>61%</td>
</tr>
<tr>
<td>Guaranteed ride home</td>
<td>22%</td>
<td>37%</td>
<td>59%</td>
</tr>
<tr>
<td>Compressed work week</td>
<td>33%</td>
<td>19%</td>
<td>52%</td>
</tr>
<tr>
<td>Ridematching</td>
<td>15%</td>
<td>35%</td>
<td>50%</td>
</tr>
<tr>
<td>Preferential carpool parking</td>
<td>20%</td>
<td>26%</td>
<td>46%</td>
</tr>
<tr>
<td>Carpooler financial benefits</td>
<td>20%</td>
<td>22%</td>
<td>42%</td>
</tr>
</tbody>
</table>
Our Conclusions
Arlington County’s Business Leaders Rate Arlington County High As a Business Location. This Rating, As Expected, Is Just Slightly Lower in 2012 versus the 2007 Benchmark
Despite a Challenging Economy, Business Leaders Still Feel Arlington County’s Transportation System Is the Number One “Business Attribute”
Arlington County’s Multimodal Transportation System - Offering Choices Is What the Business Community Values Mostly About Arlington County’s Transportation System
There Is Still Growth Potential for the County’s Multimodal Transportation System
What You Can Do Next
1. Promote the Arlington County Master Transportation Plan

2. Sign Up with ATP
   arlingtontransportationpartners.com
   (703) 247-9299

3. Give Us Suggestions on Who Else Should See This Presentation
Arlington County Master Transportation Plan

Arlington’s Vision of Transportation is a System That Provides Equity and Access to All Users

- Goal 1 – Provide High Quality Transportation Services
- Goal 2 – Move More People Without More Traffic
- Goal 3 – Promote Safety
- Goal 4 – Establish Equity
- Goal 5 – Manage Effectively and Efficiently
- Goal 6 – Advance Environmental Sustainability
Arlington County Master Transportation Plan

Performance Measures for Arlington County’s Combined Transportation System and Services

• Maintain peak-period vehicle-miles traveled across Arlington’s street network within five percent of 2005 levels.

• Maintain peak-period vehicle trips traveled across Arlington’s street network within five percent of 2005 levels.

• Shift 10 percent of peak-period trips to nonpeak hours by the year 2020.

• Increase daily peak-period non-SOV mode share (transit, carpooling, walking, bicycling) by one-half percentage point annually throughout the County for all types of trips for the next 20 years.
“Multimodal transportation accessibility and a location with a strong sense of place makes Arlington County a place where people want to be.”

Business Leader
Thank You