Arlington Economic Development
Business Study

August 23, 2016
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Background, Objectives, and Methodology
Project Background

Numerous factors contribute to businesses’ and workers’ satisfaction with their locality. In an effort to better understand the satisfaction of businesses and workers throughout Arlington County, Arlington Economic Development (AED) partnered with the Southeastern Institute of Research (SIR) to conduct its first-ever business study.
Project Objectives

Overall objectives of this research effort include:

1. Identify how local businesses and workers currently perceive Arlington County as a business location.

2. Identify any local misperceptions that must be overcome and opportunities that should be leveraged to build Arlington’s pro-business reputation.
Research Approach

Based on these objectives, a two-step surveying process was implemented targeting two distinct audiences:

1. Business Leader Study
2. Worker Study
This report is organized around 10 key insights.
Each key insight is followed by a strategic implication related to advancing Arlington County’s pro-business reputation.
4 key findings from the Business Leader Study

+ 5 key findings from the Worker Study

+ 1 key finding from comparing data from both studies
Business Leader Study
Objectives and Methodology
Business Leader Study Objectives

Objectives of the business leader study include:

1. Identify how business leaders currently perceive Arlington County as a business location.

2. Identify any local misperceptions that must be overcome and opportunities that should be leveraged to build Arlington County’s pro-business reputation.

3. Identify current expectations of a business location and assess how Arlington County is performing on these expectations. This assessment will identify and rank performance gaps, helping Arlington County become an even stronger business location.

4. Use the resulting data to build a business satisfaction driver model and establish key performance benchmarks for future performance monitoring.
Business Leader Study Methodology

- A 10-minute survey was created by SIR and approved by AED. The survey was programmed and administered online by SIR.

- Responses were collected April 20–July 1, 2016.

- Survey invitations were sent to 2,414 local business leader email addresses provided by AED.

- A total of 272 responses were collected.

- Respondents received no incentive to participate.

- Respondents were screened to ensure they work in Arlington County and occupy a senior leadership role in their organization. Respondents in non-senior leadership roles were redirected to the worker survey.

- Data was analyzed by SIR, including coding and tabulation of open-ended responses.
Note that business leader respondent data is presented using a blue color scheme.
Business Leader Respondent Profile
Q23. Are you:

Business leaders

n = 270

Male 60%

Female 40%
Nearly Half of Business Leader Respondents Are Members of Generation X

Average Age Is 49 Years

- **Generation X (Gen Xers) (1965–1982)**: 47%
- **Millennials (1983–2001)**: 13%
- ** Boomers (1946–1964)**: 35%
- **Silent/Greatest generations (1909–1945)**: 5%

Based on Q22. In what year were you born?
Over a Third of Business Leader Respondents Are Business Owners

Q1. Which of the following best describes your role in your organization? Select all that apply.

- Owner: 37%
- President: 19%
- C-level executive: 17%
- Director: 17%
- Founder: 16%
- Senior leader: 15%
- Vice president: 12%
- Partner/principal: 10%

In order to participate, respondents had to be currently employed. Respondents who hold roles other than those listed were redirected to the Worker version of the survey.

Business leaders
n = 272
Business Leader Respondents Work Across All Areas of Arlington County

About a Quarter Work in Ballston

Q28. Where in Arlington County do you work?

Business leaders
n = 272
Business Leader Respondent

**Work Zip Code Map**
Close to Half of Business Leader Respondents Have Worked in Arlington County for 10 Years or Longer

Average Number of Years Worked in Arlington Is 11

Q17. Approximately how many years have you worked in Arlington County?

Less than 3 years: 15%
3–9 years: 40%
10 years or more: 45%

Business leaders
n = 271
Three-Quarters of Business Leader Respondents Work at a Private Company

Q25. Which of the following best describes your organization?

- Private company: 75%
- Nonprofit organization: 13%
- Government agency: 5%
- Other: 6%

Business leaders, n = 272
Business Leader Respondents Work in a Wide Variety of Industries

Approximately One in Five Works in Consulting/Professional Services or Real Estate/Development Services

<table>
<thead>
<tr>
<th>Industry</th>
<th>%</th>
<th>Industry</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consulting/Professional services</td>
<td>21%</td>
<td>Finance/Insurance</td>
<td>3%</td>
</tr>
<tr>
<td>Real estate/Development services</td>
<td>17%</td>
<td>Healthcare</td>
<td>3%</td>
</tr>
<tr>
<td>IT/Technology/Computers</td>
<td>7%</td>
<td>Retail</td>
<td>3%</td>
</tr>
<tr>
<td>Food/Restaurant/Hospitality</td>
<td>5%</td>
<td>Manufacturing</td>
<td>2%</td>
</tr>
<tr>
<td>Advertising/Marketing/Public relations</td>
<td>4%</td>
<td>Research</td>
<td>2%</td>
</tr>
<tr>
<td>Engineering</td>
<td>4%</td>
<td>Architecture</td>
<td>1%</td>
</tr>
<tr>
<td>Government</td>
<td>4%</td>
<td>Biotech</td>
<td>1%</td>
</tr>
<tr>
<td>Legal</td>
<td>4%</td>
<td>Defense/Security</td>
<td>1%</td>
</tr>
<tr>
<td>Nonprofit/Associations/Advocacy services</td>
<td>4%</td>
<td>Media</td>
<td>1%</td>
</tr>
<tr>
<td>Art/Design</td>
<td>3%</td>
<td>Sports</td>
<td>1%</td>
</tr>
<tr>
<td>Education</td>
<td>3%</td>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>

Business leaders, n = 272

Q26. In what industry do you work?
Nearly Four in Five Business Leader Respondents Typically Work During the Daytime, but Many Keep Untraditional Hours

Q29. Which of the following best describes the time of day you typically work? Select all that apply.

- Daytime: 79%
- Early morning: 31%
- Evening: 31%
- Nighttime: 11%
- It varies: 23%

Business leaders
n = 272
About Two-Thirds of Business Leader Respondents Work in Organizations with 50 Employees or Fewer

Q30. Approximately how many people work at your organization?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10</td>
<td>42%</td>
</tr>
<tr>
<td>10–50</td>
<td>21%</td>
</tr>
<tr>
<td>51–100</td>
<td>11%</td>
</tr>
<tr>
<td>101–500</td>
<td>15%</td>
</tr>
<tr>
<td>Over 500</td>
<td>9%</td>
</tr>
<tr>
<td>Not sure</td>
<td>1%</td>
</tr>
</tbody>
</table>

63% of respondents work in organizations with 50 employees or fewer.
Annual Organizational Revenues Vary Considerably for Business Leader Respondents

*About a Third Work in Organizations with Revenues Under $1M*

Q31. Which of the following best describes your organization’s annual revenues?

- Less than $1 million: 35%
- $1 million or more but less than $5 million: 16%
- $5 million or more, but less than $50 million: 21%
- $50 million or more, but less than $500 million: 12%
- $500 million or more, but less than $1 billion: 1%
- $1 billion or more: 4%
- Not sure/not applicable: 11%
In Addition to Working in Arlington County, Almost Two-Thirds of Business Leader Respondents Live and/or Play in Arlington

Q2. Which of the following do you do in Arlington County? Select all that apply.

- I live in Arlington County: 64%
- I regularly play (spend my free time) in Arlington County: 64%

Business leaders n = 272
Business Leader Respondent

Home Zip Code Map
Perceptions of Arlington County as a Business Location
Business leader respondents tend to associate accessibility, convenient location, and expensive costs with Arlington County as a business location.
“What three words best describe Arlington County as a business location?”

Business Leaders
Business Leader Respondents Feel Arlington County’s Greatest **Strengths** as a Business Location Are Its Location and Transit System

Q10. What do you feel are Arlington County’s greatest strengths as a business location?

<table>
<thead>
<tr>
<th>Strength</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern Virginia location</td>
<td>36%</td>
</tr>
<tr>
<td>Transit system</td>
<td>30%</td>
</tr>
<tr>
<td>General location comments</td>
<td>29%</td>
</tr>
<tr>
<td>High-quality workforce</td>
<td>16%</td>
</tr>
<tr>
<td>Population demographics</td>
<td>9%</td>
</tr>
<tr>
<td>Educational system</td>
<td>8%</td>
</tr>
<tr>
<td>Government cooperation</td>
<td>7%</td>
</tr>
<tr>
<td>Quality clientele/customers</td>
<td>5%</td>
</tr>
<tr>
<td>Safe</td>
<td>5%</td>
</tr>
<tr>
<td>Placemaking</td>
<td>4%</td>
</tr>
<tr>
<td>Satisfies needs</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>

Categories were created based on coded open-ended responses. Meaningful responses were coded into multiple categories, so percentages do not add to 100%.
Business Leader Respondents Feel Bureaucratic Challenges and High Costs Are Arlington County’s Greatest Weaknesses as a Business Location

Q11. What do you feel are Arlington County’s biggest weaknesses as a business location?

Categories were created based on coded open-ended responses. Meaningful responses were coded into multiple categories, so percentages do not add to 100%.

46% cite cost-related issues

- Bureaucratic challenges: 28%
- Taxes and fees: 16%
- High property costs: 16%
- Expensive: 14%
- Traffic: 9%
- Transportation issues: 9%
- Stringent regulations: 8%
- Weak reputation: 6%
- Parking difficulties: 5%
- Crowded: 4%
- Not attractive to new business: 3%
- No business diversity: 2%
- Other: 10%
- Nothing: 5%

Business leaders n = 238
The good news is that two of the dominant themes associated with Arlington County as a business location are positive (great location and accessibility). However, having a reputation for high costs is not an asset. Arlington County should play off its strengths in order to increase the perception of the value of doing business in Arlington. In other words, emphasize the unique benefits of Arlington in communications to businesses so that the expense feels justified.
Satisfaction with Arlington County as a Business Location
The majority of business leader respondents are satisfied with Arlington County as a business location.
About Seven in Ten Business Leader Respondents Are Satisfied with Arlington County as a Business Location

Q7. Overall, how satisfied are you with Arlington County as a business location?

Business leaders
n = 272

5 – Very satisfied: 28%
4: 41%
3: 23%
2: 6%
1 – Not at all satisfied: 1%
“Why did you give this rating?”

Satisfied Business Leader Respondents (4–5 Rating)

“Arlington tries hard to balance the needs of business, residents, workers, and the less affluent. It draws bright young people, has great transportation, higher ed., and treats its elders well.”

“Arlington has the perfect balance of being an easy place to access for work; easy to get to customers because of both highway and transit links; a plethora of good restaurants and shops; a lot of good living options; and a business-friendly attitude.”

“Well-run and supportive government that attracts business with support services such as BizLaunch and Arlington Economic Development. The array of services offered and available smooth the path to business growth and development.”

“Strategic location provides stakeholder value that can be leveraged to shape the regional business brand.”

“Arlington continues to support local business growth [and] reinvest in its commercial centers and multimodal access. It is a great place to live and work. We just renewed our office lease for another 5 years.”
“Why did you give this rating?”

Dissatisfied Business Leader Respondents (1–2 Rating)

“Taxes are too much—for the business, all of the business assets. I shouldn't have to think about how anything I buy for my business will be taxed by the county.”

“Arlington doesn't do the basics; buildings don't have address numbers, streets don't have block numbers, bus stops don't have maps.”

“Arlington has become a very difficult location to innovate and improve the business environments due to lack of flexibility and desire to effectively compete. The governmental staff are more than resistant to change; they are incentivized (through protecting their job) to actively turn down innovation.”

“County government puts many roadblocks in place to get simple things done. Extra, unnecessary oversight, and major communication problems between departments within the county.”

“Arlington remains a one-industry town in recovery.”
There Are No Significant Differences in Satisfaction with Arlington County as a Business Location Among Demographic Groups for Business Leader Respondents

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Group</th>
<th>Satisfied with Arlington County as a Business Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Male</td>
<td>69%</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>70%</td>
</tr>
<tr>
<td>Generation</td>
<td>Millennial</td>
<td>66%</td>
</tr>
<tr>
<td></td>
<td>Generation X</td>
<td>65%</td>
</tr>
<tr>
<td></td>
<td>Boomers/Silent/Greatest generations</td>
<td>76%</td>
</tr>
<tr>
<td>Years worked in Arlington County</td>
<td>Fewer than 3 years</td>
<td>71%</td>
</tr>
<tr>
<td></td>
<td>3–9 years</td>
<td>69%</td>
</tr>
<tr>
<td></td>
<td>10+ years</td>
<td>69%</td>
</tr>
<tr>
<td>Number of employees in organization</td>
<td>Fewer than 10 employees</td>
<td>71%</td>
</tr>
<tr>
<td></td>
<td>10–100 employees</td>
<td>73%</td>
</tr>
<tr>
<td></td>
<td>101+ employees</td>
<td>63%</td>
</tr>
</tbody>
</table>

Business leaders
n = 272

Q7. Overall, how satisfied are you with Arlington County as a business location?
Business leaders  
\( n = 272 \)

Q14. How likely are you to recommend Arlington County as a business location?

The **Net Promoter Score™** Subtracts Detractors from Promoters

<table>
<thead>
<tr>
<th>Score</th>
<th>Promoters</th>
<th>Detractors</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>17%</td>
<td>0%</td>
</tr>
<tr>
<td>9</td>
<td>12%</td>
<td>1%</td>
</tr>
<tr>
<td>8</td>
<td>18%</td>
<td>1%</td>
</tr>
<tr>
<td>7</td>
<td>24%</td>
<td>1%</td>
</tr>
<tr>
<td>6</td>
<td>10%</td>
<td>1%</td>
</tr>
<tr>
<td>5</td>
<td>10%</td>
<td>1%</td>
</tr>
<tr>
<td>4</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>3</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>2</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>1</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>0</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Net Promoter Score™ Calculation

The Net Promoter Score (NPS)™ takes the percentage of respondents who are promoters (those who are highly likely to recommend your company or products), and subtracts the percentage who are detractors (those who are less likely to recommend your company or products).

\[
\text{Percentage of Promoters} \quad \text{(Rating 9 or 10)} \\
\vdash \\
\text{Percentage of Detractors} \quad \text{(Rating 0 to 6)} \\
\hline
\text{Net Promoter Score™}
\]

*NPS is the trademark of Bain & Company.*
Business Leader Respondents Give Arlington County (as a Business Location) an Overall Net Promoter Score™ of 1

<table>
<thead>
<tr>
<th>Percentage of Promoters (Rating 9 or 10)</th>
<th>29%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of Detractors (Rating 0 to 6)</td>
<td>28%</td>
</tr>
</tbody>
</table>

Net Promoter Score™ 1

NPS is the trademark of Bain & Company.
Business Leader Respondents Who Are Female, Are Not Gen Xers, Have Worked in Arlington County for Fewer than Three Years, or Work in Organizations with Fewer than 10 Employees Have a Slightly Higher NPS™

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Group</th>
<th>NPS™</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Male</td>
<td>-4</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>5</td>
</tr>
<tr>
<td>Generation</td>
<td>Millennial</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Generation X</td>
<td>-7</td>
</tr>
<tr>
<td></td>
<td>Boomers/Silent/Greatest generations</td>
<td>7</td>
</tr>
<tr>
<td>Years worked in Arlington County</td>
<td>Fewer than 3 years</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>3–9 years</td>
<td>-3</td>
</tr>
<tr>
<td></td>
<td>10+ years</td>
<td>1</td>
</tr>
<tr>
<td>Number of employees in organization</td>
<td>Fewer than 10 employees</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>10–100 employees</td>
<td>-4</td>
</tr>
<tr>
<td></td>
<td>101+ employees</td>
<td>-4</td>
</tr>
</tbody>
</table>

Q14. How likely are you to recommend Arlington County as a business location?

Business leaders n = 272
“What, if anything, can Arlington County do to become a stronger business location?”

“Less pandering to business, more devotion to community at large. Slow pursuit of business without a smarter growth plan. Consider quality of businesses vs. quantity.”

“Leverage highly educated and capable workforce to develop attractive lines of businesses, especially for younger generation. I think Arlington has a potential to become ‘Silicon Valley of the East,’ concentrating on advanced analytics, cybersecurity, and artificial intelligence.”

“Continue to work on making it easy to do business. The recent summit addressed the support of the county to promote Arlington and provide real support—keep it up.”

“Focus more on filling current vacancies than developing new residential properties! Supporting the arts and cultural [activities] in a thoughtful way. Putting up more/clearer signs to help people get where they're going (in Crystal City and Nauck, for example).”

“Stop over-taxing small businesses. Stop the tangible business property tax. Attract commercial businesses to fill the empty ‘for lease’ areas.”
Satisfaction among business leader respondents is strong! Arlington County should be proud of this. In an effort to keep satisfaction high and hopefully drive it (and NPS) even higher, take respondent suggestions for improvement to heart. Comb respondent comments for changes that can be easily implemented and opportunities for improved communication with area business leaders. The scores from this study can be used as benchmarks in future studies to measure the county’s improvement.
Attribute Importance Versus Performance
**Business Leader Attribute Lists**

- Business leader respondents were shown three lists describing:
  1. Business location attributes
  2. Economic development activities
  3. Emotional attributes of a work location

- For each list, respondents were asked to rate both the **importance** of each attribute and Arlington County’s **performance** on a 1–5 scale.

- These ratings were subsequently used to conduct a variety of analyses, each of which examines the data in a different way.
Attribute list analyses reveal that Arlington County’s primary opportunities for improvement include retaining and supporting existing businesses, building a pro-business reputation and government, and appropriate taxes and real estate.
Q3. In general, how important is it for any business location to be, have, or offer each of the following attributes?
The Most Important Economic Development Activity for Business Leader Respondents Is Retaining and Supporting Existing Businesses

<table>
<thead>
<tr>
<th>Activity</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retaining and supporting existing businesses</td>
<td>29%</td>
<td>58%</td>
<td></td>
<td></td>
<td></td>
<td>87%</td>
</tr>
<tr>
<td>Building a pro-business brand reputation for the area</td>
<td>29%</td>
<td>51%</td>
<td></td>
<td></td>
<td></td>
<td>80%</td>
</tr>
<tr>
<td>“Placemaking”—creating a desirable place to live to attract the workforce</td>
<td>35%</td>
<td>44%</td>
<td></td>
<td></td>
<td></td>
<td>79%</td>
</tr>
<tr>
<td>Advancing regional cooperation</td>
<td>42%</td>
<td>28%</td>
<td></td>
<td></td>
<td></td>
<td>69%</td>
</tr>
<tr>
<td>Revitalizing and redeveloping community neighborhoods</td>
<td>33%</td>
<td>36%</td>
<td></td>
<td></td>
<td></td>
<td>69%</td>
</tr>
<tr>
<td>Supporting startups</td>
<td>33%</td>
<td>33%</td>
<td></td>
<td></td>
<td></td>
<td>66%</td>
</tr>
<tr>
<td>Encouraging collaboration between local businesses and colleges/universities</td>
<td>35%</td>
<td>31%</td>
<td></td>
<td></td>
<td></td>
<td>66%</td>
</tr>
<tr>
<td>Training and developing the workforce</td>
<td>33%</td>
<td>28%</td>
<td></td>
<td></td>
<td></td>
<td>62%</td>
</tr>
<tr>
<td>Recruiting businesses from outside the area</td>
<td>30%</td>
<td>31%</td>
<td></td>
<td></td>
<td></td>
<td>61%</td>
</tr>
<tr>
<td>Promoting area tourism</td>
<td>26%</td>
<td>22%</td>
<td></td>
<td></td>
<td></td>
<td>47%</td>
</tr>
<tr>
<td>Supporting the area arts community</td>
<td>20%</td>
<td>22%</td>
<td></td>
<td></td>
<td></td>
<td>42%</td>
</tr>
</tbody>
</table>

Q4. How important is it that any business location engage in the following economic development activities?
Business Leader Respondents Feel the Most Important Feeling That a Business Location Should Provoke Is Having a High Quality of Life

Q5. How important is it that any business location provoke the following feelings in the people who work there?
The **Business Location Attribute** Where Business Leader Respondents Feel Arlington County Performs Best Is a Safe Environment

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Performs very well</th>
<th>Performs well</th>
<th>Performs okay</th>
<th>Performs poorly</th>
<th>Performs very poorly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safe environment</td>
<td>32%</td>
<td>57%</td>
<td></td>
<td></td>
<td>89%</td>
</tr>
<tr>
<td>Good public school system</td>
<td>30%</td>
<td>55%</td>
<td></td>
<td></td>
<td>86%</td>
</tr>
<tr>
<td>High quality of life</td>
<td>33%</td>
<td>50%</td>
<td></td>
<td></td>
<td>83%</td>
</tr>
<tr>
<td>Great access to clients, customers, and consumers</td>
<td>35%</td>
<td>42%</td>
<td></td>
<td></td>
<td>77%</td>
</tr>
<tr>
<td>Qualified and available workforce</td>
<td>37%</td>
<td>40%</td>
<td></td>
<td></td>
<td>77%</td>
</tr>
<tr>
<td>Great regional transit system</td>
<td>36%</td>
<td>32%</td>
<td></td>
<td></td>
<td>69%</td>
</tr>
<tr>
<td>Great regional highway network</td>
<td>37%</td>
<td>26%</td>
<td></td>
<td></td>
<td>63%</td>
</tr>
<tr>
<td>Quality education and workforce dev. programs</td>
<td>31%</td>
<td>30%</td>
<td></td>
<td></td>
<td>61%</td>
</tr>
<tr>
<td>Creative culture</td>
<td>37%</td>
<td>24%</td>
<td></td>
<td></td>
<td>60%</td>
</tr>
<tr>
<td>Supportive business community</td>
<td>34%</td>
<td>23%</td>
<td></td>
<td></td>
<td>57%</td>
</tr>
<tr>
<td>Cutting-edge technological infrastructure</td>
<td>40%</td>
<td>17%</td>
<td></td>
<td></td>
<td>57%</td>
</tr>
<tr>
<td>Reasonable and predictable taxes</td>
<td>34%</td>
<td>20%</td>
<td></td>
<td></td>
<td>54%</td>
</tr>
<tr>
<td>Access to sources of business capital/funding</td>
<td>36%</td>
<td>16%</td>
<td></td>
<td></td>
<td>52%</td>
</tr>
<tr>
<td>Great startup environment and support network</td>
<td>31%</td>
<td>20%</td>
<td></td>
<td></td>
<td>51%</td>
</tr>
<tr>
<td>Appropriate real estate product</td>
<td>32%</td>
<td>16%</td>
<td></td>
<td></td>
<td>48%</td>
</tr>
<tr>
<td>Pro-business government</td>
<td>29%</td>
<td>17%</td>
<td></td>
<td></td>
<td>47%</td>
</tr>
</tbody>
</table>

Q9. How well do you think Arlington County performs as a business location on each of the following attributes?
The **Economic Development Activity** Where Business Leader Respondents Feel Arlington County Performs Best Is Placemaking

“Placemaking”—creating a desirable place to live to attract the workforce
- Performs very well: 43% (Level 4)
- Performs good to very good: 23% (Level 5)
- Total: 66%

Supporting the area arts community
- Performs very well: 41% (Level 4)
- Performs good to very good: 21% (Level 5)
- Total: 62%

Promoting area tourism
- Performs very well: 37% (Level 4)
- Performs good to very good: 21% (Level 5)
- Total: 58%

Supporting startups
- Performs very well: 36% (Level 4)
- Performs good to very good: 22% (Level 5)
- Total: 58%

Revitalizing and redeveloping community neighborhoods
- Performs very well: 39% (Level 4)
- Performs good to very good: 18% (Level 5)
- Total: 57%

Training and developing the workforce
- Performs very well: 38% (Level 4)
- Performs good to very good: 13% (Level 5)
- Total: 50%

Advancing regional cooperation
- Performs very well: 32% (Level 4)
- Performs good to very good: 17% (Level 5)
- Total: 49%

Encouraging collaboration between local businesses and colleges/universities
- Performs very well: 30% (Level 4)
- Performs good to very good: 17% (Level 5)
- Total: 47%

Building a pro-business brand reputation for the area
- Performs very well: 28% (Level 4)
- Performs good to very good: 15% (Level 5)
- Total: 44%

Retaining and supporting existing businesses
- Performs very well: 29% (Level 4)
- Performs good to very good: 13% (Level 5)
- Total: 42%

Recruiting businesses from outside the area
- Performs very well: 24% (Level 4)
- Performs good to very good: 16% (Level 5)
- Total: 41%

Q12. Please rate how well Arlington County performs on each of the following economic development activities.

"Don’t know" responses were removed for analysis. The average “don’t know” percentage across attributes is 21%.
The **Feeling** That Business Leader Respondents Say Best **Describes** Working in Arlington County Is Comfortable

<table>
<thead>
<tr>
<th>Feeling</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel comfortable in the community</td>
<td>39%</td>
<td>45%</td>
</tr>
<tr>
<td>I feel like I work where everything is within easy reach</td>
<td>31%</td>
<td>46%</td>
</tr>
<tr>
<td>I have a high quality of life working here</td>
<td>34%</td>
<td>42%</td>
</tr>
<tr>
<td>I feel proud of where I work</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>I feel like it is my &quot;work home&quot;</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>It matches my values</td>
<td>38%</td>
<td>29%</td>
</tr>
<tr>
<td>It has a good energy or vibe</td>
<td>40%</td>
<td>27%</td>
</tr>
<tr>
<td>I feel I am part of a community</td>
<td>32%</td>
<td>35%</td>
</tr>
<tr>
<td>I feel like it fits my personality</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>It is fun to work here</td>
<td>39%</td>
<td>23%</td>
</tr>
<tr>
<td>It is an exciting place to work</td>
<td>37%</td>
<td>22%</td>
</tr>
<tr>
<td>I feel smart working here</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td>I feel like it is a friendly business community</td>
<td>35%</td>
<td>19%</td>
</tr>
<tr>
<td>I feel like it's a unique place to work</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>It is a cool/hip place to work</td>
<td>31%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q13. Thinking about Arlington County, how well does each of the following describe how you feel about working in the area?
Gap Analysis
Understanding Gap Analysis
Expectation and Performance

The first step in identifying areas of opportunity is to look at *gap analysis*. This gathers ratings of what respondents find important when it comes to a business location—their expectation. The process then follows up by asking respondents how well those various attributes actually describe Arlington County—its performance.

Importance of attribute

Q3. In general, how important is it for any business location to be, have, or offer each of the following attributes?

Q4. How important is it that any business location engage in the following economic development activities?

Q5. How important is it that any business location provoke the following feelings in the people who work there?

Performance of attribute

Q9. How well do you think Arlington County performs as a business location on each of the following attributes?

Q12. Please rate how well Arlington County performs on each of the following economic development activities.

Q13. Thinking about Arlington County, how well does each of the following describe how you feel about working in the area?
### Business Location Attribute Gap Analysis

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Importance</th>
<th>Performance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safe environment</td>
<td>92%</td>
<td>89%</td>
<td>-2</td>
</tr>
<tr>
<td>Great regional transit system</td>
<td>89%</td>
<td>69%</td>
<td>-21</td>
</tr>
<tr>
<td>Reasonable and predictable taxes</td>
<td>88%</td>
<td>54%</td>
<td>-34</td>
</tr>
<tr>
<td>Appropriate real estate product</td>
<td>87%</td>
<td>48%</td>
<td>-39</td>
</tr>
<tr>
<td>Qualified and available workforce</td>
<td>85%</td>
<td>77%</td>
<td>-8</td>
</tr>
<tr>
<td>Great access to clients, customers, and consumers</td>
<td>85%</td>
<td>77%</td>
<td>-7</td>
</tr>
<tr>
<td>Pro-business government</td>
<td>85%</td>
<td>47%</td>
<td>-38</td>
</tr>
<tr>
<td>High quality of life</td>
<td>84%</td>
<td>83%</td>
<td>-1</td>
</tr>
<tr>
<td>Good public school system</td>
<td>77%</td>
<td>86%</td>
<td>8</td>
</tr>
<tr>
<td>Great regional highway network</td>
<td>74%</td>
<td>63%</td>
<td>-10</td>
</tr>
<tr>
<td>Creative culture</td>
<td>71%</td>
<td>60%</td>
<td>-11</td>
</tr>
<tr>
<td>Cutting-edge technological infrastructure</td>
<td>70%</td>
<td>57%</td>
<td>-13</td>
</tr>
<tr>
<td>Quality education and workforce development programs</td>
<td>66%</td>
<td>61%</td>
<td>-5</td>
</tr>
<tr>
<td>Supportive business community</td>
<td>63%</td>
<td>57%</td>
<td>-6</td>
</tr>
<tr>
<td>Great startup environment and support network</td>
<td>61%</td>
<td>51%</td>
<td>-10</td>
</tr>
<tr>
<td>Access to sources of business capital/funding</td>
<td>54%</td>
<td>52%</td>
<td>-1</td>
</tr>
</tbody>
</table>

Percentages represent top two box scores of “4” and “5.”
## Business Leader Respondent Economic Development Activity Gap Analysis

### Activity

<table>
<thead>
<tr>
<th>Activity</th>
<th>Importance</th>
<th>Performance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retaining and supporting existing businesses</td>
<td>87%</td>
<td>42%</td>
<td>-45</td>
</tr>
<tr>
<td>Building a pro-business brand reputation for the area</td>
<td>80%</td>
<td>44%</td>
<td>-37</td>
</tr>
<tr>
<td>“Placemaking”—creating a desirable place to live to attract the workforce</td>
<td>79%</td>
<td>66%</td>
<td>-13</td>
</tr>
<tr>
<td>Advancing regional cooperation</td>
<td>69%</td>
<td>49%</td>
<td>-20</td>
</tr>
<tr>
<td>Revitalizing and redeveloping community neighborhoods</td>
<td>69%</td>
<td>57%</td>
<td>-11</td>
</tr>
<tr>
<td>Supporting startups</td>
<td>66%</td>
<td>58%</td>
<td>-8</td>
</tr>
<tr>
<td>Encouraging collaboration between local businesses and colleges/universities</td>
<td>66%</td>
<td>47%</td>
<td>-19</td>
</tr>
<tr>
<td>Training and developing the workforce</td>
<td>62%</td>
<td>50%</td>
<td>-12</td>
</tr>
<tr>
<td>Recruiting businesses from outside the area</td>
<td>61%</td>
<td>41%</td>
<td>-21</td>
</tr>
<tr>
<td>Promoting area tourism</td>
<td>47%</td>
<td>58%</td>
<td>11</td>
</tr>
<tr>
<td>Supporting the area arts community</td>
<td>42%</td>
<td>62%</td>
<td>20</td>
</tr>
</tbody>
</table>

Percentages represent top two box scores of “4” and “5.”
# Business Leader Respondent Emotional Attribute Gap Analysis

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Importance</th>
<th>Performance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have a high quality of life working here</td>
<td>89%</td>
<td>76%</td>
<td>-13</td>
</tr>
<tr>
<td>I feel comfortable in the community</td>
<td>88%</td>
<td>83%</td>
<td>-4</td>
</tr>
<tr>
<td>I feel like I work where everything is within easy reach</td>
<td>86%</td>
<td>77%</td>
<td>-9</td>
</tr>
<tr>
<td>I feel proud of where I work</td>
<td>82%</td>
<td>74%</td>
<td>-8</td>
</tr>
<tr>
<td>It has a good energy or vibe</td>
<td>79%</td>
<td>67%</td>
<td>-12</td>
</tr>
<tr>
<td>I feel like it is a friendly business community</td>
<td>78%</td>
<td>54%</td>
<td>-24</td>
</tr>
<tr>
<td>I feel I am part of a community</td>
<td>74%</td>
<td>67%</td>
<td>-7</td>
</tr>
<tr>
<td>It is fun to work here</td>
<td>72%</td>
<td>62%</td>
<td>-10</td>
</tr>
<tr>
<td>It is an exciting place to work</td>
<td>72%</td>
<td>59%</td>
<td>-13</td>
</tr>
<tr>
<td>I feel like it is my &quot;work home&quot;</td>
<td>71%</td>
<td>69%</td>
<td>-1</td>
</tr>
<tr>
<td>It matches my values</td>
<td>71%</td>
<td>67%</td>
<td>-4</td>
</tr>
<tr>
<td>I feel like it fits my personality</td>
<td>63%</td>
<td>65%</td>
<td>2</td>
</tr>
<tr>
<td>I feel smart working here</td>
<td>59%</td>
<td>56%</td>
<td>-3</td>
</tr>
<tr>
<td>It is a cool/hip place to work</td>
<td>56%</td>
<td>49%</td>
<td>-7</td>
</tr>
<tr>
<td>I feel like it's a unique place to work</td>
<td>53%</td>
<td>50%</td>
<td>-3</td>
</tr>
</tbody>
</table>

Percentages represent top two box scores of “4” and “5.”
Opportunity Maps
This map helps illustrate how satisfaction and perceived performance on attributes can highlight strengths and opportunities.

**Opportunity Map**

- **GROWTH OPPORTUNITY**
  - Opportunities for improvement

- **MAINTAIN AND REINFORCE**
  - Continue to invest and develop to build strength

- **SAVE RESOURCES**
  - Should not invest resources here

- **RESERVE STRENGTH**
  - A reserve that can “protect”
Attributes by quadrant:

**Maintain and reinforce strengths**
That are important.
Reserve strengths tend to be niche attributes, important to small market segments.
Save resources on attributes that are limitations, but not as important to the market.

**Growth opportunities are important to respondents but not rated highly; this is where you focus for the greatest ROI.**

---

**Business Location Attribute**  
**Opportunity Map**

**GROWTH OPPORTUNITY**
- Reasonable and predictable taxes
- Appropriate real estate product
- Pro-business government

**MAINTAIN AND REINFORCE**
- Safe environment
- Great regional transit system
- Qualified and available workforce
- Great access to clients, customers, and consumers
- High quality of life

**SAVE RESOURCES**
- Great regional highway network
- Creative culture
- Cutting-edge technological infrastructure
- Quality education and workforce development programs
- Supportive business community
- Great startup environment and support network
- Access to sources of business capital/funding

**RESERVE STRENGTH**
- Good public school system

---

**Importance**

**Performance**
Attributes by quadrant:

Maintain and reinforce strengths that are important.

Reserve strengths tend to be niche attributes, important to small market segments.

Save resources on attributes that are limitations, but not as important to the market.

Growth opportunities are important to respondents but not rated highly; this is where you focus for the greatest ROI.

**Business Leader Respondent**

**Economic Development Activity** Opportunity Map

### GROWTH OPPORTUNITY
- Retaining and supporting existing businesses
- Building a pro-business brand reputation for the area
- Advancing regional cooperation

### MAINTAIN AND REINFORCE
- “Placemaking”—creating a desirable place to live to attract the workforce
- Revitalizing and redeveloping community neighborhoods

### SAVE RESOURCES
- Encouraging collaboration between local businesses and colleges/universities
- Training and developing the workforce
- Recruiting businesses from outside the area

### RESERVE STRENGTH
- Supporting startups
- Promoting area tourism
- Supporting the area arts community
Attributes by quadrant:

**Maintain and reinforce strengths that are important.**

Reserve strengths tend to be niche attributes, important to small market segments.

Save resources on attributes that are limitations, but not as important to the market.

Growth opportunities are important to respondents but not rated highly; this is where you focus for the greatest ROI.

### Emotional Attribute Opportunity Map

#### GROWTH OPPORTUNITY
- I feel like it is a friendly business community

#### MAINTAIN AND REINFORCE
- I have a high quality of life working here
- I feel comfortable in the community
- I feel like I work where everything is within easy reach
- I feel proud of where I work
- It has a good energy or vibe
- I feel I am part of a community

#### SAVE RESOURCES
- It is fun to work here
- It is an exciting place to work
- I feel like it fits my personality
- I feel smart working here
- It is a cool/hip place to work
- I feel like it's a unique place to work

#### RESERVE STRENGTH
- I feel like it is my "work home"
- It matches my values
In terms of the attributes of a business location, Arlington County nails the basics of safety and comfort, and goes above and beyond by shining in the area of placemaking. However, business leader respondents feel like they are lacking support. Increase communication efforts to new and existing businesses regarding all the ways that Arlington County can help them. It would also be worthwhile to try to understand the specific areas where business leaders could use support.
Connection to the Arlington County Business Community
Nearly a third of business leader respondents are involved in the Arlington County business community.
Over Two in Five Business Leader Respondents Anticipate Working in Arlington County for the Next Three to Ten Years

Q16. How much longer do you anticipate working in Arlington County?

- I am already planning on moving/looking for a new job away from here: 4%
- Only another year or two: 9%
- Perhaps the next 3 to 10 years: 43%
- More than 10 but less than 20 years: 14%
- 20+ years: 15%
- I have no idea: 14%

Business leaders: n = 272
A Quarter of Business Leader Respondents Are Current Members of the Arlington Chamber of Commerce

Yes
24%

No
74%

Not sure
2%

Q19. Are you a current member of the Arlington Chamber of Commerce?

Business leaders
n = 272
About a Third of Business Leader Respondents Are Involved in the Arlington County Business Community

Q18. Overall, how involved are you in the Arlington County business community? By “involved,” we mean regularly participating in activities such as being an active member of a business association, staying informed about local business affairs, sharing your opinions and advocating on behalf of area businesses, and other similar activities.

Business leaders  
\( n = 272 \)
Business Leader Respondents Who Have Worked in Arlington County for 3+ Years Are Significantly More Involved in the Business Community

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Group</th>
<th>Involved in Arlington County Business Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Male</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>25%</td>
</tr>
<tr>
<td>Generation</td>
<td>Millennial</td>
<td>43%</td>
</tr>
<tr>
<td></td>
<td>Generation X</td>
<td>31%</td>
</tr>
<tr>
<td></td>
<td>Boomers/Silent/Greatest generations</td>
<td>28%</td>
</tr>
<tr>
<td>Years worked in Arlington County</td>
<td>Fewer than 3 years</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>3–9 years</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td>10+ years</td>
<td>32%</td>
</tr>
<tr>
<td>Number of employees in organization</td>
<td>Fewer than 10 employees</td>
<td>29%</td>
</tr>
<tr>
<td></td>
<td>10–100 employees</td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td>101+ employees</td>
<td>32%</td>
</tr>
</tbody>
</table>

Q18. Overall, how involved are you in the Arlington County business community? By “involved,” we mean regularly participating in activities such as being an active member of a business association, staying informed about local business affairs, sharing your opinions and advocating on behalf of area businesses, and other similar activities.
Over Two in Five Business Leader Respondents Would Like to Be More Involved in the Arlington County Business Community

Q20. Would you like to be more involved in the Arlington County business community?

- Yes: 43%
- No: 22%
- Not sure: 35%

Business leaders
n = 272
“What, if anything, can Arlington County do to encourage you to become more involved in the local business community?”

“They need to communicate more with ... businesses. Outside of a few communications, the only communication we received is our tax form.”

“Encourage existing businesses to reach out to new or un-involved businesses. Host open house events to encourage new businesses to get involved.”

“ASK ME! Why not send me a welcome/informational letter along with my business license? Don't just take my money and offer me nothing.”

“Put more focus on small business, not just in lip service but real budgetary decisions, staff, and programs. Also, rules and practices that are supportive and friendly to small businesses.”

“Provide opportunities for business community to participate in public processes that aren't dominated by the same handful of vocal civic activists that dominate every public process.”
What’s more striking than the number of business leader respondents involved in the Arlington County business community *today* is the amount who *want* to be more involved, and also the amount who are *unsure*. Offer various avenues (both in person and online) for business leaders that make it easy to be involved. Communicate these options to local businesses so that those who wish to be involved (and those on the fence) can participate if desired.
Worker Study
Objectives and Methodology
Worker Study Objectives

Objectives of the worker study include:

1. Profile workers in Arlington County (demographics).

2. Identify how local workers currently perceive Arlington County as a business location.

3. Measure overall satisfaction with current work situation, with work location, and with Arlington as a place to live and play.

4. Assess ratings of importance and performance across defining attributes of a location as a place to work. Identify gaps between expectations and current performance to help inform AED’s long-term planning.
Worker Study Objectives

Objectives of the worker study include:

5. Identify and rank the perceived issues and barriers to making Arlington more appealing as a place to work, live, and play.

6. Understand all of the above from different audience perspectives—type of worker, home region, generation, industry, etc.

7. Build a panel of survey respondents that can be used in the future to test different ideas and concepts.
Worker Study Methodology

- A 12-minute survey was created by SIR and approved by AED. The survey was programmed and administered online by SIR.
- Responses were collected April 20–July 1, 2016.
- AED recruited respondents by disseminating the survey link through a variety of modes (social media, newsletters, etc.).
- A total of 296 responses were collected.
- Respondents were incentivized with a $5 electronic Starbucks gift card.
- Respondents were screened to ensure they work in Arlington County and occupy a non-senior leadership role in their organization. Respondents in senior leadership roles were redirected to the business leader survey.
- Data was analyzed by SIR, including coding and tabulation of open-ended responses.
Note that worker respondent data is presented using a red color scheme.
Worker
Respondent Profile
Worker Respondents Skew Female

Q28. Are you:

- Female: 72%
- Male: 28%

Workers
n = 294
More than Two in Five Worker Respondents Are Millennials

Average Age Is 40 Years

- Gen Xers (1965–1982): 35%
- Boomers (1946–1964): 20%
- Silent/Greatest generations (1909–1945): 1%

Based on Q27. In what year were you born?

Workers n = 296
Seven in Ten Worker Respondents Identify Themselves as White

- White: 72%
- Black or African American: 9%
- Asian: 6%
- Other race: 3%
- American Indian or Alaska Native: 1%
- Prefer not to answer: 11%

Q30. Which of these do you consider yourself to be? Select all that apply.
About One in Ten Worker Respondents Are of Hispanic or Latino Descent

- No: 83%
- Yes: 8%
- Prefer not to answer: 9%

Q29. Are you of Hispanic or Latino descent?
Nearly Half of All Worker Respondents Are Married

Q31. What is your marital status?

- Married: 47%
- Single: 28%
- Living with partner: 11%
- Divorced: 4%
- Separated: 2%
- Prefer not to answer: 7%

Workers
n = 296
The Most Common Household Size for Worker Respondents Is Two People

- One: 18%
- Two: 42%
- Three: 16%
- Four: 12%
- Five: 6%
- Six or more: 1%
- Prefer not to answer: 5%

Q32. Including yourself, how many people live in your household?

Workers
n = 296
Among Worker Respondents Who Do Not Live Alone, Nearly a Third Have Children Currently Living in Their Household

Q33. Are there any children under the age of 18 who currently live in your household?

Workers  
\( n = 243 \)
Worker Respondents Are Evenly Split Between Owning or Renting Their Home

Q38. Do you currently rent or own your home?

- Rent: 45%
- Own: 49%
- Neither: 5%

Workers
n = 296
Over Four in Five Worker Respondents Hold a Bachelor’s Degree or Higher

- High school graduate or equivalent: 1%
- Some college, no degree: 4%
- Associate degree: 8%
- Bachelor's degree: 47%
- Master's degree: 32%
- Doctorate: 4%
- Prefer not to answer: 3%

Workers n = 296

Q34. What is the highest level of education you have completed?
About Half of Worker Respondents Have Annual Household Incomes Under $125,000

*Average Annual Household Income Is $114,000*

Q35. Which of the following best represents your total combined annual household income?

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>$25,000–$49,000</td>
<td>8%</td>
</tr>
<tr>
<td>$50,000–$74,000</td>
<td>19%</td>
</tr>
<tr>
<td>$75,000–$99,999</td>
<td>11%</td>
</tr>
<tr>
<td>$100,000–$124,999</td>
<td>15%</td>
</tr>
<tr>
<td>$125,000–$149,999</td>
<td>10%</td>
</tr>
<tr>
<td>$150,000–$174,999</td>
<td>9%</td>
</tr>
<tr>
<td>$175,000–$199,999</td>
<td>6%</td>
</tr>
<tr>
<td>$200,000 or more</td>
<td>8%</td>
</tr>
<tr>
<td>Not sure/prefer not to answer</td>
<td>14%</td>
</tr>
</tbody>
</table>

Workers
n = 296
Nine in Ten Worker Respondents Are Employed Full-Time

Q1. What is your current employment status? Select all that apply.

- Employed full-time: 91%
- Employed part-time: 8%
- Self-employed/freelancer/entrepreneur: 4%
- Part-time student: 2%
- Full-time student: 1%
- Other: 0%
Worker Respondents Work All over Arlington County

- Courthouse: 20%
- Ballston: 18%
- Crystal City: 17%
- Rosslyn: 15%
- Clarendon: 5%
- Virginia Square: 3%
- Shirlington: 3%
- Pentagon City: 3%
- Columbia Pike: 2%
- Other: 13%
- Not sure: 1%

Q39. Where in Arlington County do you work?

Workers
n = 296
Worker Respondent
Work Zip Code Map
Over Two in Five Worker Respondents Have Worked in Arlington County for Three to Nine Years

*Average Number of Years Worked in Arlington Is 8*

- Less than 3 years: 28%
- 3–9 years: 44%
- 10 years or more: 28%

Q11. Approximately how many years have you worked in Arlington County?

Workers
n = 296
Nearly Nine in Ten Worker Respondents Work During the Daytime, But Some Work Untraditional Hours

Q40. Which of the following best describes the time of day you typically work? Select all that apply.

- Daytime: 87%
- Early morning: 25%
- Evening: 16%
- Nighttime: 3%
- It varies: 8%

Workers n = 296
About Two in Five Worker Respondents Work in a Private Company

Q41. Which of the following best describes your organization?

- Private company: 42%
- Government agency: 36%
- Nonprofit organization: 17%
- Other: 4%

Workers
n = 296
Worker Respondents Are Employed in a Wide Variety of Industries

*About One in Five Works in Government*

<table>
<thead>
<tr>
<th>Industry</th>
<th>%</th>
<th>Industry</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government</td>
<td>22%</td>
<td>Engineering</td>
<td>2%</td>
</tr>
<tr>
<td>Consulting/Professional services</td>
<td>15%</td>
<td>Media</td>
<td>2%</td>
</tr>
<tr>
<td>Nonprofit/Associations/ Advocacy services</td>
<td>10%</td>
<td>Advertising/Marketing/Public relations</td>
<td>2%</td>
</tr>
<tr>
<td>Education</td>
<td>7%</td>
<td>Science</td>
<td>1%</td>
</tr>
<tr>
<td>Real estate/Development services</td>
<td>6%</td>
<td>Sports</td>
<td>1%</td>
</tr>
<tr>
<td>IT/Technology/Computers</td>
<td>4%</td>
<td>Architecture</td>
<td>1%</td>
</tr>
<tr>
<td>Food/Restaurant/Hospitality</td>
<td>3%</td>
<td>Art/Design</td>
<td>1%</td>
</tr>
<tr>
<td>Defense/Security</td>
<td>3%</td>
<td>Manufacturing</td>
<td>1%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>3%</td>
<td>Retail</td>
<td>1%</td>
</tr>
<tr>
<td>Finance/Insurance</td>
<td>2%</td>
<td>Other</td>
<td>8%</td>
</tr>
<tr>
<td>Legal</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Approximately a Third of Worker Respondents Are Employed in Organizations with over 500 Employees

Q43. Approximately how many people work at your organization?

Less than 10

10–50

51–100

101–500

Over 500

Not sure

Workers
n = 296
In Addition to Working in Arlington County, Approximately Half of Worker Respondents Live and/or Play in Arlington

Q3. Which of the following do you do in Arlington County? Select all that apply.

In order to participate, respondents had to work in Arlington County.

Workers
n = 296
Worker Respondent
Home Zip Code Map
Creativity Continuum
Answers to Three Key Questions Were Used to Score Respondents and Define a Workforce Creativity Continuum

1. Creativity as a Job Requirement
   Q4. How much do you agree or disagree with the following statement: “My job requires me to think creatively and involves problem solving and/or problem finding.” (1–5 scale, 1 is “strongly disagree,” 5 is “strongly agree.”)

2. Involvement with Creation
   Q5. In your job, do you do any of the following to some degree? Select all that apply: Create new ideas, create new content, create new technology.

3. Self-Defined Work Contribution
   Q6. Thinking about your primary contributions to your current employer/job, what terms best describe you? Select all that apply: producer, facilitator, innovator, administrator.
1. Creativity as a Job Requirement

Points Were Awarded Based on the Numerical Value of the Choice Respondents Selected

Q4. How much do you agree or disagree with the following statement: My job requires me to think creatively and involves problem solving and/or problem finding.

Workers
n = 296

Example: Respondents who provided a rating of “5 – Strongly agree” received 5 points toward their score.
2. Involvement with Creation

For this “Select All That Apply” Question, respondents were awarded a point for each choice they selected.

**Create new ideas**: 76%

**Create content**: 67%

**Create new technology**: 13%

Q5. In your job, do you do any of the following to some degree? Select all that apply.
2. Involvement with Creation
Half of Respondents Selected One Creative Attribute

Q5. In your job, do you do any of the following to some degree? Select all that apply.

Example: Respondents who selected one creative attribute received 1 point toward their score.
3. Self-Defined Work Contribution

Respondents Who Consider Themselves Innovators Received One Point Toward Their Score

- Producer – I perform the work: 75%
- Facilitator – I make things easy for others: 56%
- Administrator – I manage policies, procedures, and work flow: 39%
- Innovator – I bring new ideas to the enterprise: 38%
- None of the above: 2%

Q6. Thinking about your primary contributions to your current employer/job, what terms best describe you? Select all that apply.
An Overall Score from 2 to 9 Was Calculated, and Respondents Were Classified as Low, Medium, or High on the Creativity Continuum.

Creativity continuum computed from Q4, Q5, and Q6.
Three in Five Respondents Fall into the Medium Category on the Creativity Continuum

Creativity continuum computed from Q4, Q5, and Q6.

Workers
n = 296
The majority of worker respondents are satisfied with their current overall work situation.
Three in Five Worker Respondents Are Satisfied with Their Current Overall Work Situation

Workers  
n = 296

Q7. How satisfied are you with your current work situation overall?
There Are No Statistically Significant Differences in Satisfaction with Current Work Situation Based on Worker Respondent Demographics

Q7. How satisfied are you with your current work situation overall?

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Group</th>
<th>Satisfied with Current Work Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Male</td>
<td>58%</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>61%</td>
</tr>
<tr>
<td>Generation</td>
<td>Millennial</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td>Generation X</td>
<td>57%</td>
</tr>
<tr>
<td></td>
<td>Boomers/Silent/Greatest gen</td>
<td>62%</td>
</tr>
<tr>
<td>Years worked in Arlington County</td>
<td>Fewer than 3 years</td>
<td>64%</td>
</tr>
<tr>
<td></td>
<td>3–9 years</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td>10+ years</td>
<td>52%</td>
</tr>
</tbody>
</table>

Percentages represent top two box scores of “4” and “5.”

Workers n = 296
Satisfaction with Current Overall Work Situation Increases Significantly for Worker Respondents as You Move Up the Creativity Continuum

Q7. How satisfied are you with your current work situation overall?

Workers
n = 296
Creative roles translate into higher satisfaction for worker respondents with their general work situation. To the extent that Arlington County is able, encourage local businesses to incorporate elements of creativity into the jobs they offer. Clarify that “creativity” is not just creating content, but also solving problems, innovating, and bringing fresh ideas. Something as simple as providing an outlet for employees to submit ideas for improvement and acting on those ideas could be enough to inject creativity into a job.
Perceptions of Arlington County as a Work Location
Worker respondents perceive Arlington County as an accessible and convenient work location, but also cite high costs and commuting challenges.
“What three words best describe Arlington County as a location in which to work?”

Workers
Worker Respondents Feel Convenience and an Easy Commute Are the Best Things About Working in Arlington County

Q16. What is the best thing about working in Arlington County?

Categories were created based on coded open-ended responses. Only meaningful responses were coded.
About a Quarter of Worker Respondents Reported That the High Cost of Living and Their Commute Are the **Worst** Things About Working in Arlington County.

**Q17.** What is the **worst** thing about working in Arlington County?

Categories were created based on coded open-ended responses. Only meaningful responses were coded.

Workers
n = 296
As with business leader respondents, there is some good and bad when it comes to worker respondent perceptions of Arlington County. Perceptions of Arlington as expensive can be addressed in the same way as with business leaders—by emphasizing the value of working in Arlington. Educating workers regarding their many transportation options may help ease commute concerns. Target workers through their employers by enlisting help from Arlington Transportation Partners and other resources.
Satisfaction with Arlington County as a Work Location
The majority of worker respondents are satisfied with Arlington County as a work location.
Over Four in Five Worker Respondents Are Satisfied with Arlington County as a Work Location

Q13. How satisfied are you with Arlington County as a location in which to work?

Workers
n = 296

5 - Very satisfied
44%

38%

15%

2%

1 - Not at all satisfied
2%
“Why did you give this rating?”

**Satisfied Worker Respondents (4–5 Ratings)**

“I live and work in the county. I can get where I need to go by walking/biking/transit. County is well-managed for the most part.”

“Arlington County is connected to the large Washington, D.C., metro and has a variety of professional and personal opportunities.”

“I like that Arlington has a lot to offer as far as great restaurants, shops, and activities. I also like that people are very active here, and it's easy to get around (variety of transportation options).”

“Because I spend such a large part of my day working in Arlington, it is important that I am able to take care of personal errands or relax, unwind, or re-energize during short breaks in the middle of my workday. Arlington is a great community that has all of that.”

“Arlington has a great combination of urban neighborhoods that provide varied opportunities for dining, activities, and exercise. It's convenient and generally safe and predictable.”
“Why did you give this rating?”

Dissatisfied Worker Respondents (1–2 Ratings)

“Arlington County has changed in way it treats its employee and employs its ‘leaders.’ The current environment and leadership [don't] allow for creativity, real community building, and ideas.”

“Time spent on commuting takes away from work-life balance. Blue line connections are terrible. Regionally, there must be another transit hub besides Pentagon to make the major connections. Arlington and other regions could work to have seamless transit opportunities.”

“Low salary for stressful work. It's difficult to live in expensive Arlington with low pay and higher taxes.”

“It is very difficult to get here with traffic all the time, [and] everything is expensive.”

“Because even from the survey it feels like Arlington is trying too hard to be cool instead of focusing on things that genuinely make people happy.”
There Are No Significant Differences in Satisfaction with Arlington County as a Work Location Among Demographic Groups for Worker Respondents

Q13. How satisfied are you with Arlington County as a location in which to work?

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Group</th>
<th>Satisfied with Arlington County as a Work Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Male</td>
<td>79%</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>83%</td>
</tr>
<tr>
<td>Generation</td>
<td>Millennial</td>
<td>77%</td>
</tr>
<tr>
<td></td>
<td>Generation X</td>
<td>84%</td>
</tr>
<tr>
<td></td>
<td>Boomers/Silent/Greatest generations</td>
<td>89%</td>
</tr>
<tr>
<td>Years worked in Arlington County</td>
<td>Fewer than 3 years</td>
<td>78%</td>
</tr>
<tr>
<td></td>
<td>3–9 years</td>
<td>83%</td>
</tr>
<tr>
<td></td>
<td>10+ years</td>
<td>83%</td>
</tr>
<tr>
<td>Creative class</td>
<td>Low creative</td>
<td>77%</td>
</tr>
<tr>
<td></td>
<td>Medium creative</td>
<td>83%</td>
</tr>
<tr>
<td></td>
<td>High creative</td>
<td>83%</td>
</tr>
</tbody>
</table>

Workers n = 296
Worker Respondents Who Are Satisfied with Their Work Situation Are Significantly More Satisfied with Arlington County as a Work Location

Respondents were classified as “satisfied with work situation” if they provided top two box ratings to Q7.

Q13. How satisfied are you with Arlington County as a location in which to work?

Workers
n = 296
Q19. How likely are you to recommend Arlington County as a location in which to work?

Workers
n = 296

The **Net Promoter Score™** Subtracts Detractors from Promoters

![Bar chart showing the distribution of responses to Q19.](chart.png)
Worker Respondents Give Arlington County (as a Work Location) an Overall Net Promoter Score™ of 25

**Percentage of Promoters**  
(Rating 9 or 10)  
41%

**Percentage of Detractors**  
(Rating 0 to 6)  
16%

**Net Promoter Score™**  
25

*NPS is the trademark of Bain & Company.*
Worker Respondents Who Are Female, Are Gen Xers or Older, Are Medium Creatives, or Have Worked in Arlington County for 3+ Years Have a Slightly Higher NPS™

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Group</th>
<th>Net Promoter Score™</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>Male</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Female</td>
<td>26</td>
</tr>
<tr>
<td>Generation</td>
<td>Millennial</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>Generation X</td>
<td>27</td>
</tr>
<tr>
<td></td>
<td>Boomers/Silent/Greatest generations</td>
<td>27</td>
</tr>
<tr>
<td>Years worked in Arlington County</td>
<td>Fewer than 3 years</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>3–9 years</td>
<td>27</td>
</tr>
<tr>
<td></td>
<td>10+ years</td>
<td>28</td>
</tr>
<tr>
<td>Creative class</td>
<td>Low creative</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>Medium creative</td>
<td>29</td>
</tr>
<tr>
<td></td>
<td>High creative</td>
<td>23</td>
</tr>
</tbody>
</table>

Q19. How likely are you to recommend Arlington County as a location in which to work?
Arlington County’s performance as a work location among worker respondents is truly impressive! Satisfaction is consistently high among all types of worker respondents. As with business leaders, it may not hurt to review worker respondent comments to see if there is any low-hanging fruit that Arlington County can address in an effort to drive scores even higher. The scores from this study can also be used as benchmarks to see how much the county is able to move the needle in the future.
Attribute Importance Versus Performance
Worker Attribute Lists

• Worker respondents were shown two lists describing:
  1. Rational attributes of a work location
  2. Emotional attributes of a work location

• For each list, respondents were asked to rate both the importance of each attribute and Arlington County’s performance on a 1–5 scale.

• As was the case with business leader respondents, these ratings were subsequently used to conduct a variety of analyses.
Analyses of attribute lists reveal that areas of opportunity for worker respondents include a variety of employment options, affordability as a place to live, a high quality of life, and feeling like a part of the community.
Worker Respondents Feel the Most **Important** Rational **Attribute** of a Work Location Is a Safe Environment

- Is a safe environment: 96%
- Has variety of job options that match my skills, interests: 86%
- Is also a place I’d like to live: 83%
- Is also a place I could afford to live: 83%
- Has great dining, entertainment, and shopping options: 83%
- Has different transportation options available: 82%
- Has communities where everything is within 15 mins: 81%
- Has an affordable and reliable public transp. system: 79%
- Is bikeable/walkable: 77%
- Embraces innovation: 73%
- Is a diverse environment: 71%
- Embraces creativity: 70%
- It’s easy to get around in a car: 69%
- Has a good public school system: 57%
- Has options for continuing education: 55%
- Has options for higher education: 52%
- Is a hip/cool place to be: 51%
- Has easy access to childcare services: 39%

Workers, n = 296
Q8. When you think about a location (a city, county, etc.) in which you’d really want to work, how important are each of the following to you?
“What did we miss, if anything?”

“What did we miss, if anything?”

“Parks, real natural spaces, trees, outdoor recreation, connection to woods and the river or creeks, sustainability.”

“Proximity to healthcare professionals (doctors/dentists) and medical services is also very important. Proximity to public libraries is also very important.”

“Would like to be a home owner, not just a renter. Arlington is very difficult for that. Safe bike-to-work options, nearby airport, good internet speed/competition.”

“Green space! Abundance of parks and forests and trees. One of the things I really love about Arlington is that it has this.”

“Has AVAILABLE access to child care. Easy access as far as location is true. However, most locations are full and have a wait list. Child care costs are prohibitive to most single-parent household employees.”
For Worker Respondents, the Most **Important Feeling** That a Work Location Should Provoke Is Having a High Quality of Life

- I have a high quality of life working here: 34% 56% 90%
- I feel comfortable in the community: 40% 48% 88%
- I feel proud of where I work: 49% 36% 85%
- I feel like everything is within easy reach: 43% 40% 83%
- It is fun to work here: 40% 41% 81%
- It has a good energy or vibe: 40% 40% 80%
- I feel like it fits my personality: 45% 32% 77%
- It matches my values: 39% 38% 77%
- I feel I am part of a community: 40% 36% 76%
- I feel like it is a friendly business community: 41% 32% 73%
- It is an exciting place to work: 40% 32% 72%
- I feel smart working here: 42% 30% 72%
- I feel like it is my "work home": 36% 33% 69%
- I feel like it's a unique place to work: 34% 23% 57%
- It is a cool/hip place to work: 31% 19% 50%

Q10. How important is it that a location in which to work provokes the following feelings?
The **Rational Attribute** of a Work Location That Worker Respondents Think Arlington County Performs Best In Is a Safe Environment

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Performs very well</th>
<th>Performs well</th>
<th>Performs somewhat well</th>
<th>Performs not very well</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is a safe environment</td>
<td>37%</td>
<td>52%</td>
<td>89%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has different transportation options available</td>
<td>31%</td>
<td>56%</td>
<td>87%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is bikeable/walkable</td>
<td>34%</td>
<td>52%</td>
<td>86%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has communities where everything is within 15 minutes</td>
<td>36%</td>
<td>50%</td>
<td>86%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has a good public school system</td>
<td>24%</td>
<td>61%</td>
<td>85%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is also a place I’d like to live</td>
<td>25%</td>
<td>57%</td>
<td>82%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has great dining, entertainment, and shopping options</td>
<td>30%</td>
<td>50%</td>
<td>80%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has options for continuing education</td>
<td>40%</td>
<td>35%</td>
<td>75%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Embraces innovation</td>
<td>37%</td>
<td>37%</td>
<td>74%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has an affordable and reliable public transp. system</td>
<td>33%</td>
<td>39%</td>
<td>72%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has variety of job options that match my skills, interests</td>
<td>39%</td>
<td>33%</td>
<td>72%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Embraces creativity</td>
<td>38%</td>
<td>34%</td>
<td>72%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has options for higher education</td>
<td>37%</td>
<td>35%</td>
<td>72%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is a hip/cool place to be</td>
<td>38%</td>
<td>29%</td>
<td>67%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is a diverse environment</td>
<td>29%</td>
<td>37%</td>
<td>66%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has easy access to childcare services</td>
<td>25%</td>
<td>36%</td>
<td>61%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is easy to get around in a car</td>
<td>35%</td>
<td>22%</td>
<td>57%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is a place I could afford to live</td>
<td>20%</td>
<td>11%</td>
<td>31%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“Don’t know” responses were removed for analysis. The average “don’t know” percentage across attributes is 10%.

Workers, n = varies

Q15. How well do you think Arlington County performs as a work location on each of the following?
Feeling Comfortable in the Community Is the **Emotional Attribute** That Best Describes Arlington County for Worker Respondents

- I feel comfortable in the community: 39% (4) 45% (5)
- I feel like I work where everything is within reach: 35% (4) 45% (5)
- I have a high quality of life working here: 35% (4) 41% (5)
- I feel proud of where I work: 29% (4) 45% (5)
- It has a good energy or vibe: 41% (4) 31% (5)
- I feel smart working here: 41% (4) 26% (5)
- I feel like it is a friendly business community: 33% (4) 33% (5)
- It is fun to work here: 34% (4) 31% (5)
- I feel like it is my work home: 30% (4) 35% (5)
- I feel like it matches my personality: 35% (4) 30% (5)
- It matches my values: 35% (4) 30% (5)
- I feel I am part of a community: 28% (4) 34% (5)
- It is an exciting place to work: 34% (4) 25% (5)
- It is a cool/hip place to work: 34% (4) 21% (5)
- I feel like it's a unique place to work: 30% (4) 22% (5)

Q18. Thinking about Arlington County, how well does each of the following describe how you **feel** about working in the area?

Workers
n = 296
Gap Analysis
## Worker Respondent
### Rational Attribute Gap Analysis

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Importance</th>
<th>Performance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is a safe environment</td>
<td>96%</td>
<td>89%</td>
<td>-7</td>
</tr>
<tr>
<td>Has a variety of employment options that match my skills and interests</td>
<td>86%</td>
<td>72%</td>
<td>-14</td>
</tr>
<tr>
<td>Is also a place I could afford to live</td>
<td>83%</td>
<td>31%</td>
<td>-52</td>
</tr>
<tr>
<td>Is also a place I'd like to live</td>
<td>83%</td>
<td>82%</td>
<td>-1</td>
</tr>
<tr>
<td>Has great dining, entertainment, and shopping options</td>
<td>83%</td>
<td>80%</td>
<td>-3</td>
</tr>
<tr>
<td>Has different transportation options available</td>
<td>82%</td>
<td>87%</td>
<td>5</td>
</tr>
<tr>
<td>Has communities where everything is within 15-minute access</td>
<td>81%</td>
<td>86%</td>
<td>5</td>
</tr>
<tr>
<td>Has an affordable and reliable public transportation system</td>
<td>79%</td>
<td>72%</td>
<td>-7</td>
</tr>
<tr>
<td>Is bikeable/walkable</td>
<td>77%</td>
<td>86%</td>
<td>9</td>
</tr>
<tr>
<td>Embraces innovation</td>
<td>73%</td>
<td>74%</td>
<td>1</td>
</tr>
<tr>
<td>Is a diverse environment</td>
<td>71%</td>
<td>66%</td>
<td>-5</td>
</tr>
<tr>
<td>Embraces creativity</td>
<td>70%</td>
<td>72%</td>
<td>2</td>
</tr>
<tr>
<td>It's easy to get around in a car</td>
<td>69%</td>
<td>57%</td>
<td>-12</td>
</tr>
<tr>
<td>Has a good public school system</td>
<td>57%</td>
<td>85%</td>
<td>28</td>
</tr>
<tr>
<td>Has options for continuing education</td>
<td>55%</td>
<td>75%</td>
<td>20</td>
</tr>
<tr>
<td>Has options for higher education</td>
<td>52%</td>
<td>72%</td>
<td>20</td>
</tr>
<tr>
<td>Is a hip/cool place to be</td>
<td>51%</td>
<td>67%</td>
<td>16</td>
</tr>
<tr>
<td>Has easy access to childcare services</td>
<td>39%</td>
<td>61%</td>
<td>22</td>
</tr>
</tbody>
</table>
Worker Respondent

**Emotional Attribute Gap Analysis**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Importance</th>
<th>Performance</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have a high quality of life working here</td>
<td>90%</td>
<td>76%</td>
<td>-14</td>
</tr>
<tr>
<td>I feel comfortable in the community</td>
<td>88%</td>
<td>84%</td>
<td>-4</td>
</tr>
<tr>
<td>I feel proud of where I work</td>
<td>85%</td>
<td>74%</td>
<td>-11</td>
</tr>
<tr>
<td>I feel like I work where everything is within easy reach</td>
<td>83%</td>
<td>80%</td>
<td>-3</td>
</tr>
<tr>
<td>It is fun to work here</td>
<td>81%</td>
<td>65%</td>
<td>-16</td>
</tr>
<tr>
<td>It has a good energy or vibe</td>
<td>80%</td>
<td>72%</td>
<td>-8</td>
</tr>
<tr>
<td>I feel like it fits my personality</td>
<td>77%</td>
<td>66%</td>
<td>-11</td>
</tr>
<tr>
<td>It matches my values</td>
<td>77%</td>
<td>65%</td>
<td>-12</td>
</tr>
<tr>
<td>I feel I am part of a community</td>
<td>76%</td>
<td>62%</td>
<td>-14</td>
</tr>
<tr>
<td>I feel like it is a friendly business community</td>
<td>73%</td>
<td>65%</td>
<td>-8</td>
</tr>
<tr>
<td>I feel smart working here</td>
<td>72%</td>
<td>67%</td>
<td>-5</td>
</tr>
<tr>
<td>It is an exciting place to work</td>
<td>72%</td>
<td>59%</td>
<td>-13</td>
</tr>
<tr>
<td>I feel like it is my &quot;work home&quot;</td>
<td>69%</td>
<td>65%</td>
<td>-4</td>
</tr>
<tr>
<td>I feel like it's a unique place to work</td>
<td>57%</td>
<td>52%</td>
<td>-5</td>
</tr>
<tr>
<td>It is a cool/hip place to work</td>
<td>50%</td>
<td>55%</td>
<td>5</td>
</tr>
</tbody>
</table>

Percentages represent top two box scores of “4” and “5.”

Workers

n = 296
Opportunity Maps
Attributes by quadrant:

Maintain and reinforce strengths that are important.

Reserve strengths tend to be niche attributes, important to small market segments.

Save resources on attributes that are limitations, but not as important to the market.

Growth opportunities are important to respondents but not rated highly; this is where you focus for the greatest ROI.

### Worker Respondent

#### Rational Attribute Opportunity Map

<table>
<thead>
<tr>
<th>Importance</th>
<th>GROWTH OPPORTUNITY</th>
<th>MAINTAIN AND REINFORCE</th>
<th>SAVE RESOURCES</th>
<th>RESERVE STRENGTH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Has a variety of employment options that match my skills and interests</td>
<td>• Is a safe environment</td>
<td>• Embraces creativity</td>
<td>• Has a good public school system</td>
</tr>
<tr>
<td></td>
<td>• Is also a place I can afford to live</td>
<td>• Is also a place I’d like to live</td>
<td>• It’s easy to get around in a car</td>
<td>• Has options for continuing education</td>
</tr>
<tr>
<td></td>
<td>• Has an affordable and reliable public transportation system</td>
<td>• Has great dining, entertainment, and shopping options</td>
<td>• Has options for higher education</td>
<td>• Has easy access to childcare services</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Has different transportation options available</td>
<td>• Is a hip/cool place to be</td>
<td>• Is a diverse environment</td>
</tr>
</tbody>
</table>

**Performance**
Worker Respondent

Emotional Attribute Opportunity Map

**Attributes by quadrant:**

- **Maintain and reinforce strengths that are important.**
- **Reserve strengths tend to be niche attributes, important to small market segments.**
- **Save resources on attributes that are limitations, but not as important to the market.**

**Growth opportunities are important to respondents but not rated highly; this is where you focus for the greatest ROI.**

<table>
<thead>
<tr>
<th>GROWTH OPPORTUNITY</th>
<th>MAINTAIN AND REINFORCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>- It is fun to work here</td>
<td></td>
</tr>
<tr>
<td>- I feel like it fits my personality</td>
<td></td>
</tr>
<tr>
<td>- It matches my values</td>
<td></td>
</tr>
<tr>
<td>- I feel I am part of a community</td>
<td></td>
</tr>
<tr>
<td>- I have a high quality of life working here</td>
<td></td>
</tr>
<tr>
<td>- I feel comfortable in the community</td>
<td></td>
</tr>
<tr>
<td>- I feel proud of where I work</td>
<td></td>
</tr>
<tr>
<td>- I feel like I work where everything is within easy reach</td>
<td></td>
</tr>
<tr>
<td>- It has a good energy or vibe</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SAVE RESOURCES</th>
<th>RESERVE STRENGTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>- I feel like it is friendly to the business community</td>
<td></td>
</tr>
<tr>
<td>- It is an exciting place to work</td>
<td></td>
</tr>
<tr>
<td>- I feel like it is my “work home”</td>
<td></td>
</tr>
<tr>
<td>- I feel like it’s a unique place to work</td>
<td></td>
</tr>
<tr>
<td>- It is a cool/hip place to work</td>
<td></td>
</tr>
<tr>
<td>- I feel smart working here</td>
<td></td>
</tr>
</tbody>
</table>
All in all, Arlington County delivers in most areas and has few opportunities for improvement. Arlington County should address these areas of opportunity as it is able. Supporting existing businesses should help contribute to a variety of employment opportunities for workers. Encourage workers—not just business leaders—to take part in the Arlington County business community. While affordability is more challenging to address, any improvements made in these areas should also help with perceptions of a high quality of life working in Arlington.
Working, Living, and Playing in Arlington County
9

Worker respondent perceptions of Arlington County as a business location, a place to live, and a place to play are all positive.
Four in Five Worker Respondents Have a Positive Perception of Arlington County as a Business Location

- 37% Extremely positive
- 43% Neutral
- 14% Extremely negative
- 1% Don't know
- 4% Other

Q20. Overall, what are your perceptions of Arlington County as a business location? By “business location,” we mean a locale (city, county, etc.) that provides access to workforce, capital, infrastructure, customers, and other inputs that businesses need in order to be successful.
About Three-Quarters of Worker Respondents Have a Positive Perception of Arlington County as a Place to Live and Play

Q22. What are your overall perceptions of Arlington County as a place to live and play?

Workers
n = 296
Among Worker Respondents Who Live and/or Play in Arlington County, over Three-Quarters Are Satisfied with Arlington as a Place to Live and Play.

- **A place to live**: 42% Very satisfied, 37% 5 - Very satisfied, 79% total satisfied.
- **A place to play**: 41% Very satisfied, 35% 5 - Very satisfied, 76% total satisfied.

**Question asked among respondents who indicated in Q3 that they live and/or play in Arlington County.**

Workers n = varies

Q23. How satisfied are you with Arlington County on the following?
Worker Respondents Feel That Arlington County Is Safe But Expensive, and Locating Quality, Affordable Housing Can Be Difficult

Expensive

Unsafe

Difficult to find quality, affordable housing

Safe

Easy to find quality, affordable housing

Workers, n = 295
Q27. Many aspects contribute to making a location an appealing place to work, live, and play. Regardless of whether you spend time in Arlington County outside of work, where do you think Arlington County falls in the following categories?
Worker Respondents Feel That It Is Relatively Easy to Find a Suitable Job, Get Around Town, and Travel to Arlington County

Difficult to find a suitable job

Easy to find a suitable job

Difficult to get around town

Easy to get around town

Difficult for others to travel to

Easy for others to travel to

Workers, n = 295
Q27. Many aspects contribute to making a location an appealing place to work, live, and play. Regardless of whether you spend time in Arlington County outside of work, where do you think Arlington County falls in the following categories?
Worker Respondents Feel Arlington County Provides Fun Things to Do, a Strong Sense of Community, and a High Quality of Life

Workers, n = 295

Q27. Many aspects contribute to making a location an appealing place to work, live, and play. Regardless of whether you spend time in Arlington County outside of work, where do you think Arlington County falls in the following categories?

- Plenty of fun things to do
- Weak sense of community
- Strong sense of community
- Nothing fun to do
- Low quality of life
- High quality of life

Workers, n = 295

Q27. Many aspects contribute to making a location an appealing place to work, live, and play. Regardless of whether you spend time in Arlington County outside of work, where do you think Arlington County falls in the following categories?
“You rated Arlington County unfavorably on one or more aspects. Would you like to offer any comments as to why?”

“Arlington is devoid of a sense of community and has little respect for its own history. The expense of housing in Arlington has resulted in a decline of racial/ethnic diversity (look at the census data).”

“Housing prices are outrageously expensive. In many neighborhoods, the median sale price of a single-family detached home is nearly $1 million.”

“Impossible for middle-class families to find housing in Arlington. The county only caters to low-income families or upper-class families. Nothing affordable for middle class.”

“Travel time is difficult, metro is unreliable, housing and rental rates are expensive. Snow plowing in the winter is horrible as well, making it even more difficult to walk or commute.”

“Traffic is terrible. Parking options are limited, especially in Crystal City. We specifically moved out of Crystal City after living there for 7 years due to the nonstop construction, lane changes, bus lanes, and decreased access to Crystal Drive.”
About Two in Five Worker Respondents Plan to Work in Arlington County for the Next Three to Ten Years

Q21. How much longer do you anticipate working in Arlington County?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am already planning on moving/looking</td>
<td>5%</td>
</tr>
<tr>
<td>for a new job away from here</td>
<td></td>
</tr>
<tr>
<td>Only another year or two</td>
<td>15%</td>
</tr>
<tr>
<td>Perhaps the next 3 to 10 years</td>
<td>41%</td>
</tr>
<tr>
<td>More than 10 but less than 20 years</td>
<td>10%</td>
</tr>
<tr>
<td>20+ years</td>
<td>8%</td>
</tr>
<tr>
<td>I have no idea</td>
<td>20%</td>
</tr>
</tbody>
</table>

Workers
n = 296
“What, if anything, can Arlington County do to become a more appealing place to work, live, and play?”

“Reduce the size of new homes so that they are more affordable and build more 3-bedroom apartments/condos so families can live there. Also, retain green open space! (People need nature, and development is crowding out natural areas.)”

“Property taxes seem to be a bit high in Arlington; perhaps offering a tax break to residents who own homes and work in Arlington.”

“More cultural events like Taste of Arlington and Clarendon Day. I’d love to see movies in Quincy Park like they do in Rosslyn and other areas.”

“Continue to build on the transit network and use zoning and other tools to incent the development of more and higher-density housing all over the county. The county should continue to invest in its schools, parks, and recreation facilities.”

“Find a better way for cars and buses to coexist on the roadways. Make parking less of a hassle. Bring activities people would want to stay in the area after work to perform.”
Q45. The opinions you shared in this survey are very helpful. In the future, Arlington Economic Development may create a panel of Arlington County worker opinion leaders to guide them on an ongoing basis. This panel would share their opinions through email surveys such as this, though group discussions, or by telephone. Would you be interested in possibly participating on such a panel, if we decide to form one?
As a whole, worker respondents feel that Arlington County is a place where you can do it all—live, work, and play. While the feedback is overwhelmingly positive, the cost to live in Arlington (and the cost of housing in particular) seems to be a sore spot. As with business leaders, emphasize all the wonderful things about Arlington that make being a part of this community worth the cost. The perception of Arlington as expensive is a common theme, so this is a critical issue to address.
Comparing Business Leader and Worker Respondents
Comparing Business Leader and Worker Respondents

• While the surveys that business leader and worker respondents completed were very different, there was some question overlap.

• The following section compares the two respondent groups for all overlapping questions. Statistically significant differences between the groups are noted with a red circle.
Demographically, business leader and worker respondents are dissimilar. Each audience also has unique areas of opportunity regarding the emotional attributes of a work location.
Business Leader Respondents Are Predominantly Male, While Worker Respondents Skew Female

Business leaders 
n = 270
Workers 
n = 294

BLQ23/WQ28. Are you:

- Male
  - Business leaders: 60%
  - Workers: 28%

- Female
  - Business leaders: 40%
  - Workers: 72%
The Majority of Business Leader Respondents Are Gen Xers, While Most Worker Respondents Are Millennials

Average Age for Business Leaders Is 49, Versus 40 for Workers

Based on BLQ22/WQ27. In what year were you born?

- **Millennials (1983–2001)**
  - Business leaders: 13%
  - Workers: 44%

- **Gen Xers (1965-1982)**
  - Business leaders: 47%
  - Workers: 35%

- **Boomers (1946–1964)**
  - Business leaders: 20%
  - Workers: 35%

- **Silent/Greatest generations (1909–1945)**
  - Business leaders: 5%
  - Workers: 1%

Business leaders: n = 268
Workers: n = 296
Business Leader Respondents Have Worked in Arlington County Longer than Worker Respondents

Average Years for Business Leaders Is 11, Versus 8 for Workers

BLQ17/WQ11. Approximately how many years have you worked in Arlington County?
While All Respondents Primarily Work for Private Companies, There Is a Much Larger Concentration of Worker Respondents That Are Government Employees

<table>
<thead>
<tr>
<th>Category</th>
<th>Business leaders</th>
<th>Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private company</td>
<td>75%</td>
<td>42%</td>
</tr>
<tr>
<td>Nonprofit organization</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Government agency</td>
<td>5%</td>
<td>36%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Business leaders  n = 272
Workers n = 296

BLQ25/WQ41. Which of the following best describes your organization?
Business Leader Respondents Are Concentrated in Small Businesses, While Worker Respondents Are Employed in Larger Organizations

BLQ30/WQ43. Approximately how many people work at your organization?

- **Less than 10**: 6% (Business leaders) vs. 21% (Workers)
- **10–50**: 14% (Business leaders) vs. 15% (Workers)
- **51–100**: 15% (Business leaders) vs. 20% (Workers)
- **101–500**: 15% (Business leaders) vs. 37% (Workers)
- **Over 500**: 9% (Business leaders) vs. 7% (Workers)
- **Not sure**: 1% (Business leaders) vs. 1% (Workers)

Business leaders: n = 272
Workers: n = 296
A Significantly Larger Proportion of Business Leader Respondents than Worker Respondents Live and/or Play in Arlington County

BLQ2/WQ3. Which of the following do you do in Arlington County? Select all that apply.

- I live in Arlington County
- I regularly play (spend my free time) in Arlington County

Business leaders: n = 272
Workers: n = 296
Over Two in Five Business Leader and Worker Respondents Anticipate Working in Arlington County for the Next Three to Ten Years

I am already planning on moving/looking for a new job away from here
- Business leaders: 4%
- Workers: 5%

Only another year or two
- Business leaders: 9%
- Workers: 15%

Perhaps the next 3 to 10 years
- Business leaders: 43%
- Workers: 41%

More than 10 but less than 20 years
- Business leaders: 14%
- Workers: 10%

20+ years
- Business leaders: 14%
- Workers: 8%

I have no idea
- Business leaders: 15%
- Workers: 20%

BLQ16/WQ21. How much longer do you anticipate working in Arlington County?

Business leaders
n = 272
Workers
n = 296
The Top Two Most Important Feelings That a Location Should Provoke in the People Who Work There Are the Same for Business Leader and Worker Respondents

<table>
<thead>
<tr>
<th>Rank</th>
<th>Business Leader Respondents</th>
<th>Worker Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I have a high quality of life working here</td>
<td>I have a high quality of life working here</td>
</tr>
<tr>
<td>2</td>
<td>I feel comfortable in the community</td>
<td>I feel comfortable in the community</td>
</tr>
<tr>
<td>3</td>
<td>I feel like I work where everything is within easy reach</td>
<td>I feel proud of where I work</td>
</tr>
</tbody>
</table>

BLQ5. How important is it that any business location provoke the following feelings in the people who work there?
WQ10. How important is it that a location in which to work provokes the following feelings?
The Top Three Emotional Attributes That Best Describe Working in Arlington County Are the Same for Business Leader and Worker Respondents

<table>
<thead>
<tr>
<th>Rank</th>
<th>Business Leader Respondents</th>
<th>Worker Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I feel comfortable in the community</td>
<td>I feel comfortable in the community</td>
</tr>
<tr>
<td>2</td>
<td>I feel like I work where everything is within easy reach</td>
<td>I feel like I work where everything is within easy reach</td>
</tr>
<tr>
<td>3</td>
<td>I have a high quality of life working here</td>
<td>I have a high quality of life working here</td>
</tr>
</tbody>
</table>

BLQ13. Thinking about Arlington County, how well does each of the following describe how you feel about working in the area? 
WQ18. Thinking about Arlington County, how well does each of the following describe how you feel about working in the area?
However, Findings from Gap Analysis and Opportunity Maps for **Emotional Attributes** Look Different for Business Leader and Worker Respondents

<table>
<thead>
<tr>
<th>Method</th>
<th>Business Leader Respondents</th>
<th>Worker Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gap analysis</td>
<td>• NO GAPS IDENTIFIED</td>
<td>• I have a high quality of life working here</td>
</tr>
<tr>
<td>Opportunity map</td>
<td>• I feel like it is a friendly business community</td>
<td>• It is fun to work here</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• I feel like it fits my personality</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• It matches my values</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• I feel I am part of the community</td>
</tr>
</tbody>
</table>
Emotionally, business leader respondents do not feel that Arlington County has much work to do, but the story is different for worker respondents. Arlington County should make a special effort to appeal emotionally to workers in the area, focusing on areas identified in the gap analysis and opportunity maps (quality of life, fun, etc.). The demographic differences between the two audiences should be used to refine the message and help with targeting.
Summary
Summary

1. **Business leader respondents tend to associate accessibility, convenient location, and expensive costs with Arlington County as a business location.**

   The good news is that two of the dominant themes associated with Arlington County as a business location are positive (great location and accessibility). However, having a reputation for high costs is not an asset. Arlington County should play off its strengths in order to increase the perception of the value of doing business in Arlington. In other words, emphasize the unique benefits of Arlington in communications to businesses so that the expense feels justified.

2. **The majority of business leader respondents are satisfied with Arlington County as a business location.**

   Satisfaction among business leader respondents is strong! Arlington County should be proud of this. In an effort to keep satisfaction high and hopefully drive it (and NPS) even higher, take respondent suggestions for improvement to heart. Comb respondent comments for changes that can be easily implemented and opportunities for improved communication with area business leaders. The scores from this study can be used as benchmarks in future studies to measure the county’s improvement.
3. Attribute list analyses reveal that Arlington County’s primary opportunities for improvement include retaining and supporting existing businesses, building a pro-business reputation and government, and appropriate taxes and real estate.

In terms of the attributes of a business location, Arlington County nails the basics of safety and comfort, and goes above and beyond by shining in the area of placemaking. However, business leader respondents feel like they are lacking support. Increase communication efforts to new and existing businesses regarding all the ways that Arlington County can help them. It would also be worthwhile to try to understand the specific areas where business leaders could use support.

4. Nearly a third of business leader respondents are involved in the Arlington County business community.

What’s more striking than the number of business leader respondents involved in the Arlington County business community today is the amount who want to be more involved, and also the amount who are unsure. Offer various avenues (both in person and online) for business leaders that make it easy to be involved. Communicate these options to local businesses so that those who wish to be involved (and those on the fence) can participate if desired.
Summary

5. **The majority of worker respondents are satisfied with their current overall work situation.**

Creative roles translate into higher satisfaction for worker respondents with their general work situation. To the extent that Arlington County is able, encourage local businesses to incorporate elements of creativity into the jobs they offer. Clarify that “creativity” is not just creating content, but also solving problems, innovating, and bringing fresh ideas. Something as simple as providing an outlet for employees to submit ideas for improvement and acting on those ideas could be enough to inject creativity into a job.

6. **Worker respondents perceive Arlington County as an accessible and convenient work location, but also cite high costs and commuting challenges.**

As with business leader respondents, there is some good and bad when it comes to worker respondent perceptions of Arlington County. Perceptions of Arlington as expensive can be addressed in the same way as with business leaders—by emphasizing the value of working in Arlington. Educating workers regarding their many transportation options may help ease commute concerns. Target workers through their employers by enlisting help from Arlington Transportation Partners and other resources.
Summary

7. The majority of worker respondents are satisfied with Arlington County as a work location.

Arlington County’s performance as a work location among worker respondents is truly impressive! Satisfaction is consistently high among all types of worker respondents. As with business leaders, it may not hurt to review worker respondent comments to see if there is any low-hanging fruit that Arlington County can address in an effort to drive scores even higher. The scores from this study can also be used as benchmarks to see how much the county is able to move the needle in the future.

8. Analyses of attribute lists reveal that areas of opportunity for worker respondents include a variety of employment options, affordability as a place to live, a high quality of life, and feeling like a part of the community.

All in all, Arlington County delivers in most areas and has few opportunities for improvement. Arlington County should address these areas of opportunity as it is able. Supporting existing businesses should help contribute to a variety of employment opportunities for workers. Encourage workers—not just business leaders—to take part in the Arlington County business community. While affordability is more challenging to address, any improvements made in these areas should also help with perceptions of a high quality of life working in Arlington.
Summary

9. Worker respondent perceptions of Arlington County as a business location, a place to live, and a place to play are all positive.

As a whole, worker respondents feel that Arlington County is a place where you can do it all—live, work, and play. While the feedback is overwhelmingly positive, the cost to live in Arlington (and the cost of housing in particular) seems to be a sore spot. As with business leaders, emphasize all the wonderful things about Arlington that make being a part of this community worth the cost. The perception of Arlington as expensive is a common theme, so this is a critical issue to address.

10. Demographically, business leader and worker respondents are dissimilar. Each audience also has unique areas of opportunity regarding the emotional attributes of a work location.

Emotionally, business leader respondents do not feel that Arlington County has much work to do, but the story is different for worker respondents. Arlington County should make a special effort to appeal emotionally to workers in the area, focusing on areas identified in the gap analysis and opportunity maps (quality of life, fun, etc.). The demographic differences between the two audiences should be used to refine the message and help with targeting.
Thank You