

# RESULTS OF A SURVEY OF RESIDENTS IN THE WASHINGTON METROPOLITAN REGION

## Methodology

- Sample Size: n=600 Adults 21+
- Area Breakdown: VA: Fairfax County, Arlington County, City of Alexandria  
MD: Montgomery County, Prince George's County  
District of Columbia\*
- Margin of Error: Plus or minus 4.0%
- Interview Dates: March 13-16, 2010

\* *The sample was stratified by jurisdiction so percent of respondents from each area reflects population contribution to the metro region as a whole.*

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## Regional Poll Overview

- Regional residents are positive about the local economy (59% positive, 39% negative) and believe the Metropolitan Washington region's economy is stronger than economies in the rest of the country (72% stronger). NOVA residents are especially boosterish about local economic conditions while Prince George's County residents are the area's most pessimistic. [TABLE 1]
- Regional quality of life receives very high scores – 90% positive. [TABLE 2] The #1 factor seen as contributing to local quality of life is “good public schools.” [TABLE 3] Factors rated just below public schools are:
  - Transportation;
  - Educated workforce; and
  - Well-paying jobs.

Each of these four factors is rated over 50% as a “5” on a 1-to-5 importance rating scale.

- More regional residents expect the area's economy to continue to grow over the next 20 years but a SLOWER pace (36%) than either the same pace (26%) or at a faster rate (23%). [TABLE 4] Just 9% expect the local economy to not grow or change much from today. When it comes to preference, however, more would prefer a FASTER rate of growth (39%) with just 25% preferring a SLOWER rate of growth.

**BOTTOM LINE:** Metropolitan Washington region residents are fairly pro-growth. About half (49%) expect the rate of economic growth to be either the same or faster in the future, but even more – 61% -- would prefer a growth rate the same or faster than today's.

- The idea of a regional plan is enthusiastically embraced; 86% say it is best to have a regional plan to maximize opportunities for a stronger regional economy while just 10% say “no plan is needed” since regional economic growth will happen on its own. [TABLE 5]
- Washington region residents prefer there be more regional cooperation between political jurisdictions than they perceive to be happening today. [TABLE 6] Even though a 54% majority believes local jurisdictions do more to “cooperate” today than compete (37%), an overwhelming 81% majority – 27 points more -- would prefer greater regional “cooperation with one another to best strengthen the region’s economy and quality of life.”
- The Metrorail system (36%) and the Federal government (32%) are seen as the most symbolic and unifying factors of the Metropolitan Washington region. [TABLE 7] These two beat out sports teams, the Beltway, the Washington Post, and the Smithsonian as the most important factors bringing the region together as one.
- By a 51% to 42% margin, region residents FAVOR a “dedicated regional tax-funding source just for Metro such as a small regional sales tax.” [TABLE 8] While Fairfax and PG County residents are more against than for a regional Metro-only tax, residents in Alexandria/Arlington, DC and

Montgomery County are a majority in favor. Political party impacts views on such a tax; Democrats favor it (63-31), Republicans oppose it (33-62) and Independents split (47-46).

- Reaction to “1.6 Million Jobs” Forecast. [TABLE 9] In this pro-growth region where the currently successful economy is linked to a high quality of life, nearly four-in-five (78%) say the projected job growth – 1.6 million new jobs created over the next 20 years – is more of a good thing than bad thing (16%).

In fact, residents are so enthusiastic about job growth, a 55% majority would prefer action steps to “create even more jobs.”

Preference for filling these new jobs is clearly for “invest more locally in education and job skills so current residents fill many of the jobs” by a 79% to 10% margin over “rely on skilled people from outside the region” to come in and fill these jobs.

- Reaction to “35,000 Housing Units Per Year” Forecast. [TABLE 10] By a 61% to 26% margin, region residents prefer the demand for forecasted increase in housing be met with policies encouraging more density along Metrorail corridors than by housing policies that “continue the historic pattern of building most new houses on furthest edges of the metro area.”

Residents split, however, in their opinions about whether or not some of these new “density-oriented housing units” should be subsidized to be affordable for “average wage earners” – 47% Yes, 46% No. The subgroups most “pro-subsidy” for affordable housing are: DC residents

(57%), PG residents (59%), African Americans (69%), Democratic voters (61%) and those with a high school or less education (63%).

- Sustainability. [TABLE 11] Given the forecast for job growth and housing unit growth, region residents are still optimistic by a 2:1 margin (63% to 32%) that the region “can absorb this growth and still keep or improve quality of life.” The one-third who are pessimistic about growth’s impact on the region are fairly consistent at about the same level across all jurisdictions and demographic subgroups in the region.
- Ex-Urban Commuter Impact. [TABLE 12] Consistent with focus group findings, a significant portion of region residents – a 56% majority – support the “lifestyle choices” of ex-urban commuters rather than prefer “policies to encourage these commuters to live closer to their work within the Washington Metro area” (41%). This majority support for “lifestyle choice” comes in the face of information about “the equivalent of \$1 Billion worth of commerce” leaving the Metropolitan Washington area with these daily ex-urban commuters.
- Regional Growth Messages. [TABLE 13] Over 60% of region residents “strongly agree” – and over 80% at least “somewhat agree” – with three statements about the region’s economy and quality of life.
  1. Quality public schools in every jurisdiction throughout the region are as important as in one’s own locality.

2. Affordable workforce housing – for firefighters, police, teachers, and nurses – within local communities is in everyone’s best interest.
3. Planning and managing growth is better than to “just let happen whatever happens.”

Large numbers of region residents also agree with four other statements including...

- Since the Washington metro area economy is going to grow whether there is an organized effort to encourage it or not, the quality of life for local area residents could be threatened if proper steps are not taken to plan for and handle that growth. (88% agree)
- Encouraging denser urban-style development around and near Metrorail stops is a good idea as long as these areas function as villages where residents have needed everyday services nearby to walk to. (91% agree)
- It is in everybody’s best interest in the Metropolitan Washington area if we can keep and capture as much of the wealth generated here each day as possible. (83% agree)
- No matter how much the local Washington area grows in jobs or population, we simply cannot build enough more roads to solve our traffic problems. (73% agree).

- Bottom Line. Regional residents are positive about today's regional economy, want it to grow even more and believe that growth has a positive impact on quality of life.

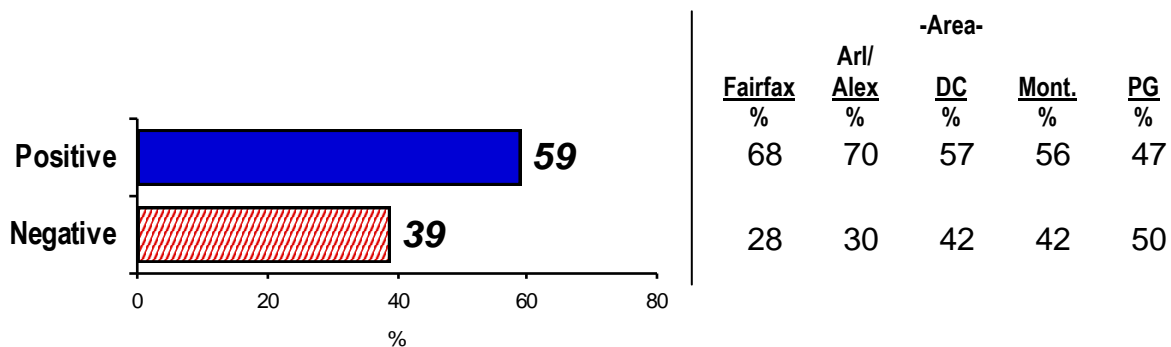
They support investments in public schools, Metrorail, and even “village-oriented” density to help insure quality of life is maintained.

Consistently, they support the concept of Regional Planning to prepare for and handle the growth in both jobs and housing units they feel is inevitable and desirable.

Table 1

## Evaluations of Metropolitan Washington Economy

**Local Economy:** First of all, how would you rate the strength of the local economy in the Washington Metro area -- excellent, good, not so good, or poor?



**Compared to Rest of Country:** And how would you say the local Washington Metro area economy is doing compared to the rest of the country – much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker?

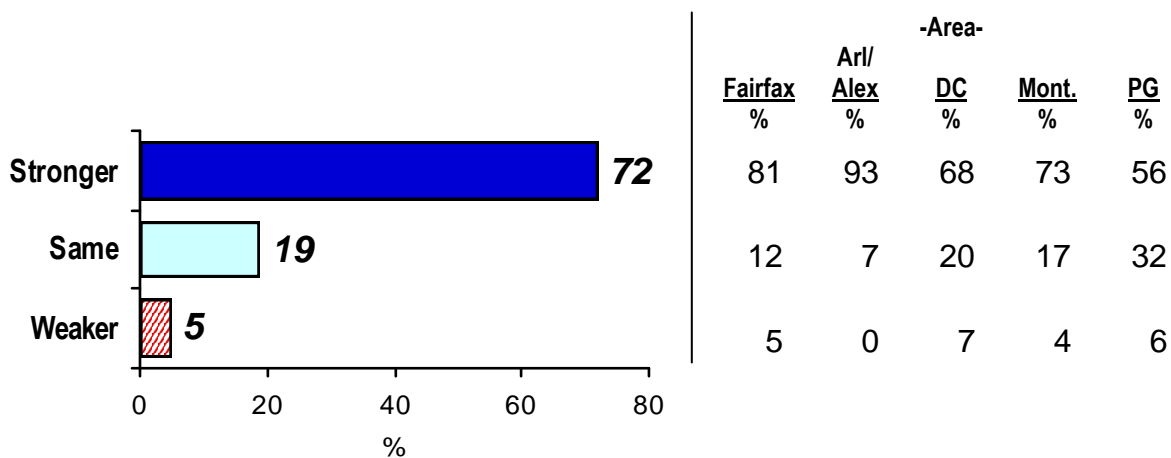




Table 2

### Rating of Local Area Quality of Life

*Overall, how would you rate the quality of life in the Metropolitan Washington area -- excellent, good, not so good, or poor?*

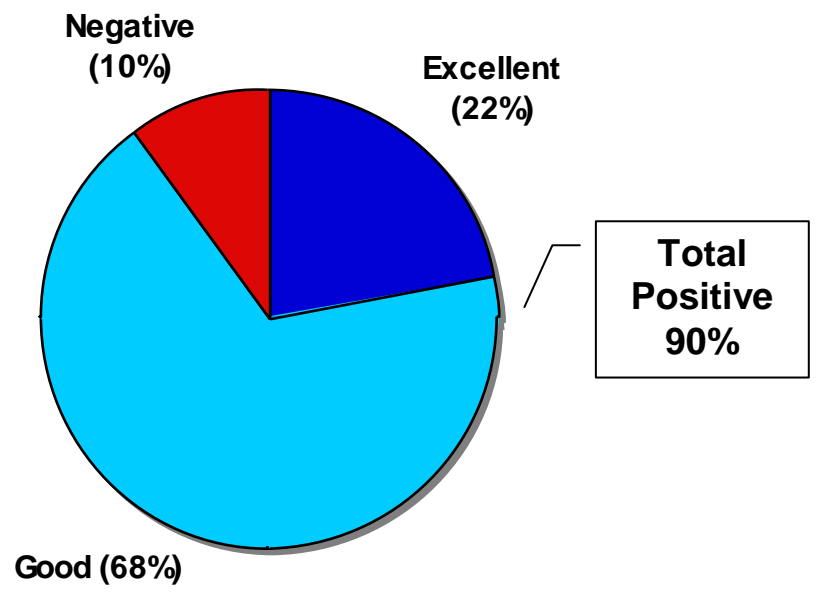


Table 3

## Quality of Life Factors

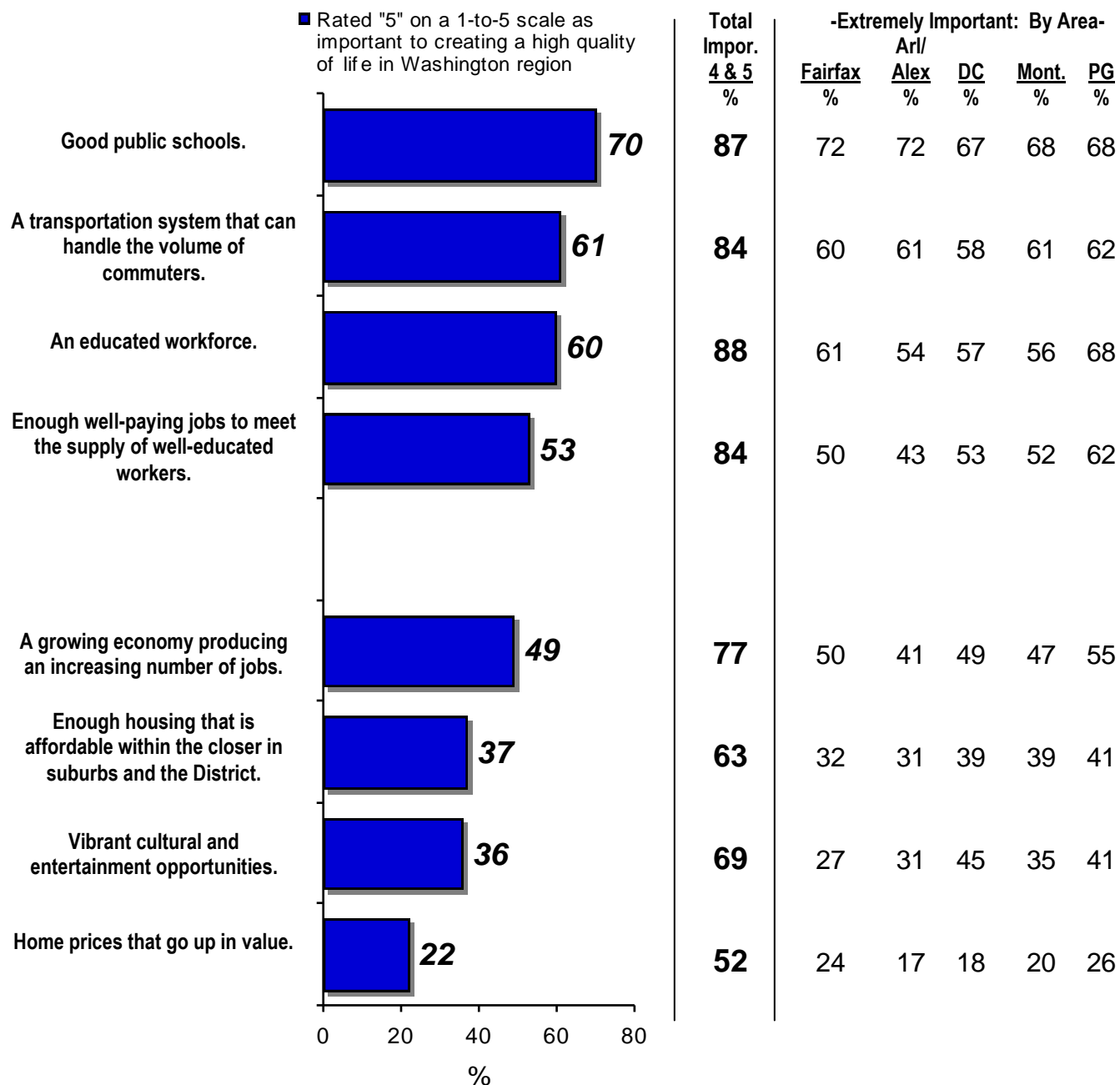


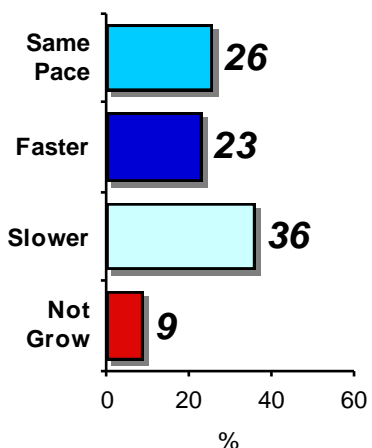
Table 4

## Future Regional Economic Growth: Expectations vs. Preference

### Expectation:

Thinking ahead 20 years from now to the year 2030, which of these four choices would be your BEST GUESS as to how the Washington Metro area economy will be doing then...?

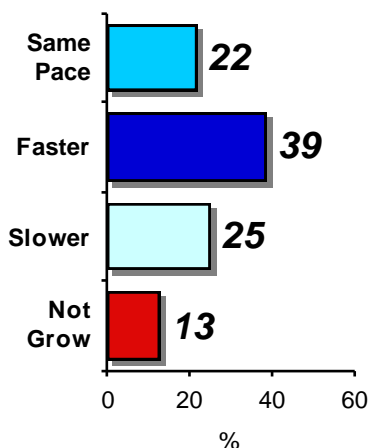
- Will have grown at about the same pace as over the last 20 years.
- Will have grown at a faster rate than the last 20 years.
- Will have grown, but at a slower rate than the last 20 years.
- OR
- Will NOT have grown or changed much at all from where it is today.



### Preference:

And, thinking about what you'd like to see happen ... that is what's best for you and your lifestyle, which of the four choices for how the regional area economy grows do you prefer?

- To grow at the same pace.
- To grow at a faster rate.
- To grow, but at a slower rate.
- OR
- To NOT grow and stay about the same as it is today.



### Different: Expectation vs. Preference

-4  
+16  
-11  
+4

Table 5

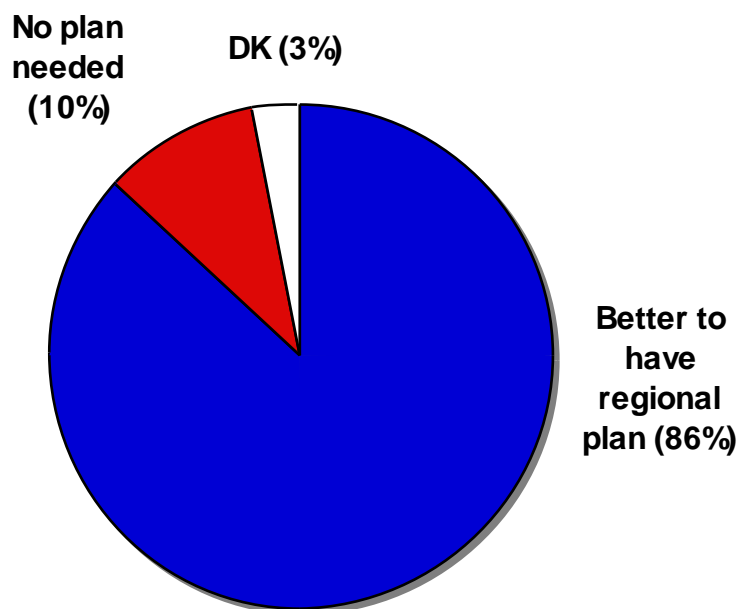
## Need for a Regional Plan for Economic Growth

*Thinking ahead over the next 20 years, do you feel that the way the Washington Metro region's economy is structured that...?*

- a. There is NO need to have a regional plan to sustain and encourage economic growth because it will just happen on its own.

--OR--

- b. It would be better to have a regional plan to maximize opportunities for a stronger regional economy.



<u>Area:</u>	<u>-Regional Plan-</u>	
	<u>Yes</u> %	<u>No</u> %
NOVA	81	14
Maryland	90	8
DC	88	10

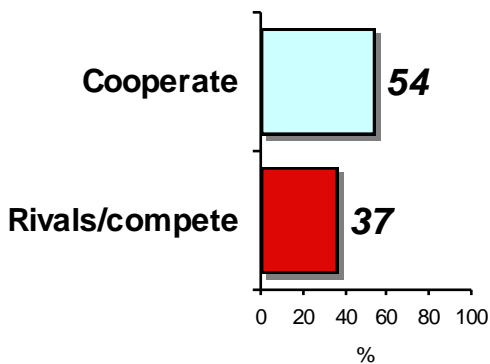
Table 6

## Regional Cooperation: Current Perception vs. Preference

### Current Perception:

Thinking about the various political jurisdictions in and around the Washington Metro area like Montgomery and Prince George's Counties in Maryland; the District of Columbia; Fairfax, Arlington, and Alexandria in Virginia that these jurisdictions...?

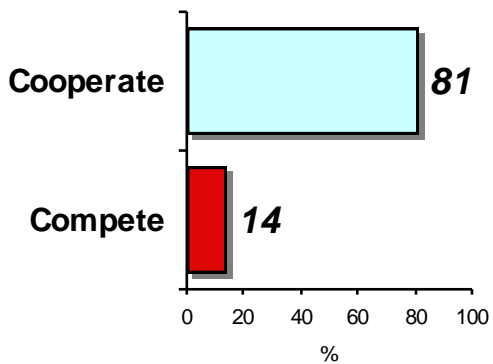
- Work more in a cooperative way to promote the region's economic health.  
OR
- Work more as rivals in competition with one another.



### Preference:

And, in your mind, should these political jurisdictions...?

- Work in competition with each other to provide the strongest economy and services to their own residents..  
OR
- Work in cooperation with one another to best strengthen the region's economy and quality of life.



**Difference in Perception vs. Preference**

**-27**

**+23**

Table 7

## Regional Unifying Factors

*Of the following six things, which one to you is the most unifying factor for the Metropolitan Washington region ... that is, the one which most symbolizes or brings together the region as a whole?*

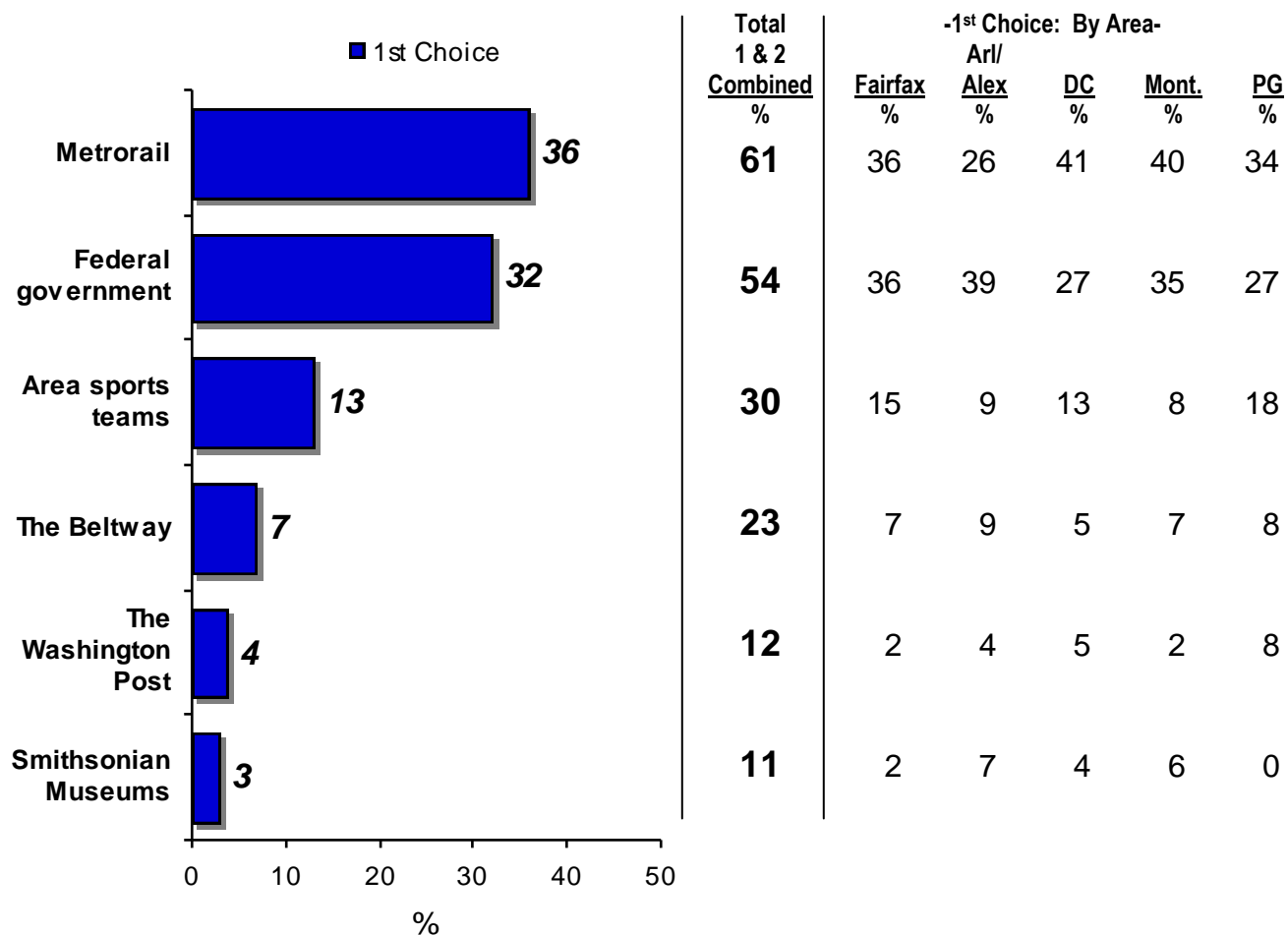


Table 8

### Metrорail Dedicated Funding Source

*As you may know, the Metrorail system is currently funded mostly by payments out of the general revenue funds of the state and local governments. Would you FAVOR or OPPOSE a new dedicated regional tax-funding source just for Metro such as a small regional sales tax?*

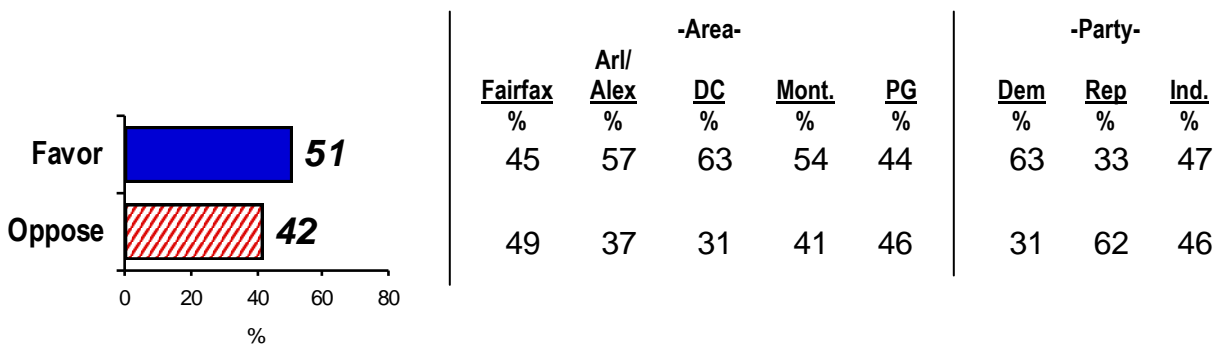
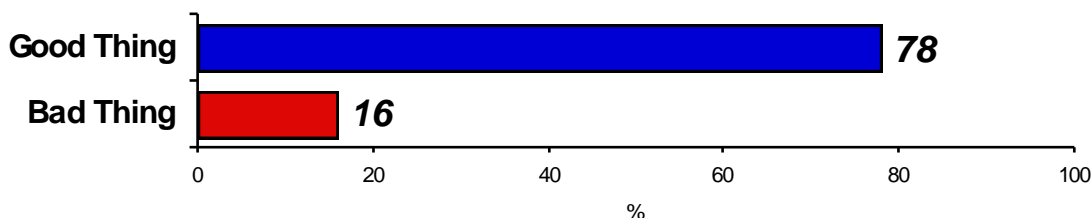


Table 9

## Job Growth Forecast – 1.6 Million over Next 20 Years -- Reactions

*If the regional economy continues on its current path of growth, 1.6 **million** new jobs will be created in the Metropolitan Washington area over the next 20 years.*

### Good vs. Bad Thing:

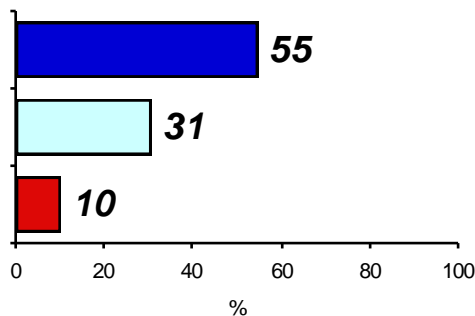


### Action Preferred:

To take steps to improve even more on the conditions that generate jobs to try and create even more jobs.

Take no action either way and let the current trends continue.

To take steps to reduce this number of new jobs to reduce the impact of growth.



### Preference for Who Fills Jobs:

We should invest more locally in education and job skills so current residents fill many of the jobs.

Mainly rely on appropriately skilled people from outside the region to come in and fill these jobs.

Both.

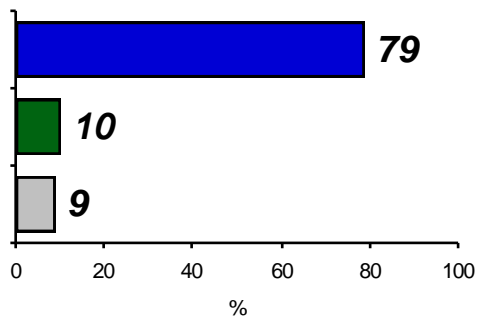




Table 10

## Housing Unit Demand Forecast – 35,000 New Units per Year -- Reactions

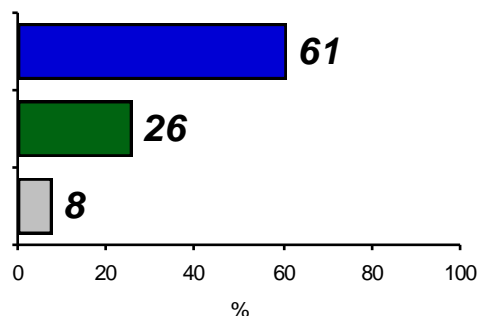
*In order to meet the population growth that will occur with job growth over the next 20 years, 35,000 new housing units per year will be needed for these new workers.*

### Preferred Housing Policy – Current vs. More Density:

Promoting housing policies that allow and encourage more density of housing unit development, especially along the Metrorail corridors.

Continue with the historic pattern of building most new houses on the furthest edges of the metro area where land is more available.

Both.



### Affordability – Subsidize vs. Market Price:

To figure out a way to make enough of these new density-oriented housing units affordable to average wage earners even if it means some subsidies from taxpayers.

To let the marketplace determine the price of housing even if these closer-in units end up being more expensive as a result.

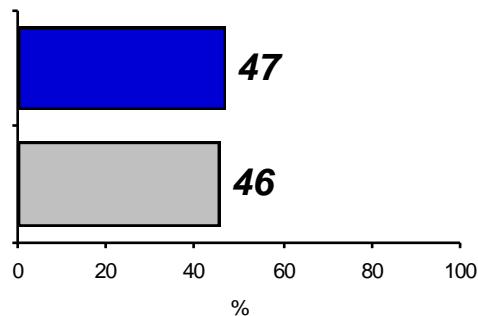


Table 11

### Impact of Job/Housing Demand Projection on Sustainability and Quality of Life

*Given this projection that the regional economy will grow by 1.6 million jobs over the next 20 years and require 35,000 new housing units to be built per year, which of the following statements is closer to how you feel?*

- *This region can and should find a way to absorb this growth and still keep or even improve quality of life.*

--OR--

- *This much growth is simply not sustainable and is bound to have a negative impact on the quality of life and the environment in the region.*

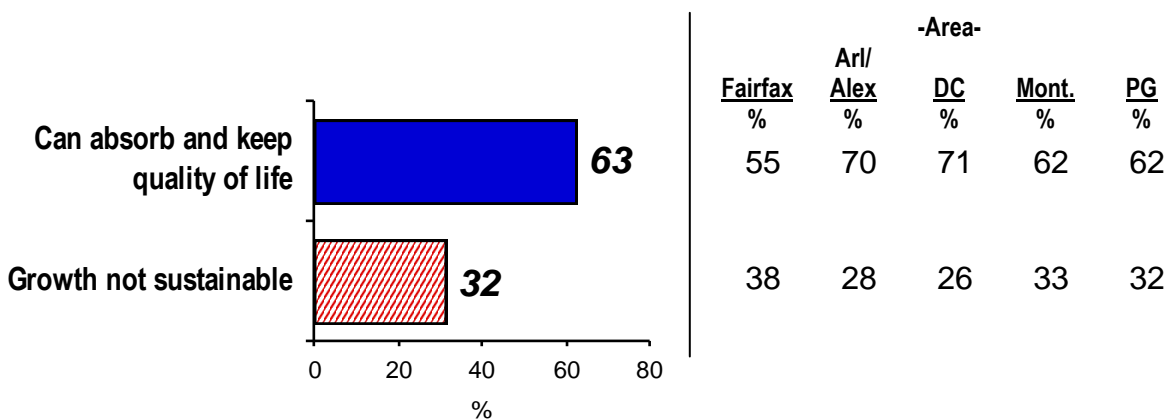


Table 12

## Ex-Urban Commuter Economic Impact -- Reactions

*Everyday, commuters who live outside the immediate Washington Metropolitan area, but work here, travel back to their homes and take with them the equivalent of 1 billion dollars worth of commerce back to the area where they live. By not finding ways to house these workers within the close-in Washington metro area, rush hour traffic is worse, and the local region loses the tax value of their earnings.*

Our region is doing fine as is now; people choose to live further out from Washington for a number of reasons and it's their choice to do so and live with the longer commutes..

There should be policies to encourage and help these "ex-urban" commuters to live close to their work within the Washington metro area.

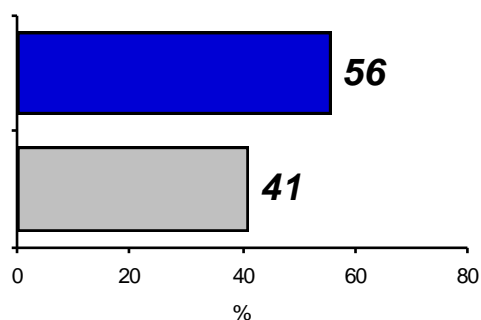


Table 13

### Summary Opinions About Regional Growth

