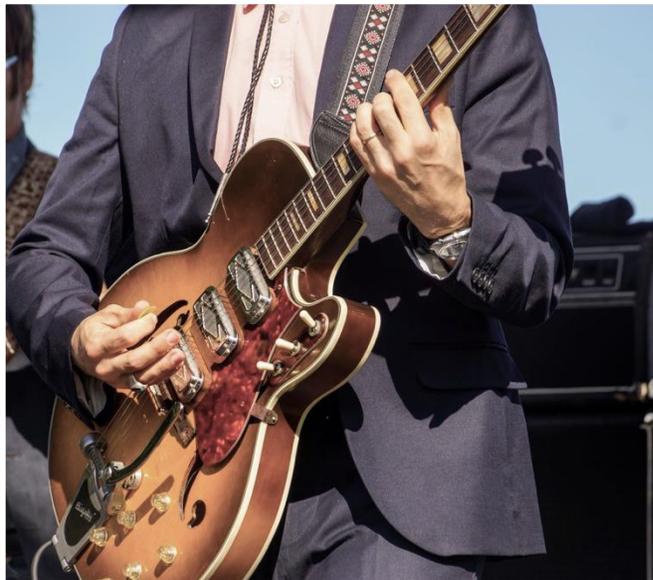


Rosslyn BID: 2018 Perception Survey Executive Summary

February 2019

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ROSSLYN

RESEARCH OBJECTIVES

In December 2016, the Rosslyn BID set out to understand the perceptions of Rosslyn as a place to live, work, and visit as held by current key stakeholders. After forming a baseline measurement in 2016 and again in December 2017, we issued the same survey in December 2018 to gauge progress. The objectives remain the same: to review year-over-year change and identify new or ongoing areas of progress and opportunity. Key stakeholder groups surveyed included:

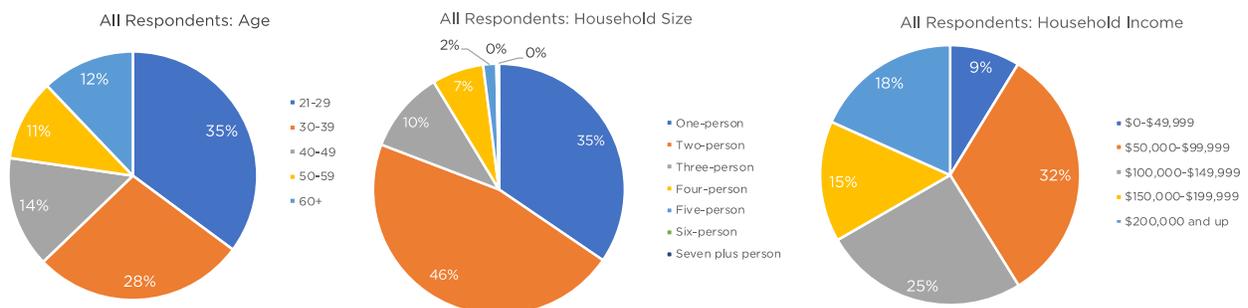
- Residents of Rosslyn
- Workforce in Rosslyn
- Visitors of Rosslyn
- Non-visitors of Rosslyn

As a means of capturing strategic data from all relevant stakeholders, we conducted an online survey through SurveyMonkey and disseminated it via Facebook advertising and the existing contact database from the opt-in BID email list throughout December 2018. We had 1,651 responses, with 790 through our Rosslyn BID email list and outreach efforts and 861 via Facebook advertising. Of that total, 1,361 completed the entire survey, a 19 percent increase from last year and more representation from those who live, work, and visit Rosslyn.

DEMOGRAPHICS

We gleaned valuable demographic data from our respondents. Respondents came from all over the Washington Metropolitan area with Rosslyn as our main hub (22209 ZIP code), followed by 22201, 22204, 22203, and other local locations in Northern Virginia, DC, and Maryland.

The respondents' demographics showcase a diverse, well-educated group with the majority (60 percent) in their 20s and 30s, living in small households (81 percent in one- or two-person households), well-educated (93 percent with a bachelor's degree or higher), and earning high incomes (76 percent earning well above the national average) — all of which are generally consistent with the demographic makeup of Rosslyn itself. These key stakeholders are primed to take advantage of all that Rosslyn has to offer residents, visitors, employees, and businesses alike.



YEAR-OVER-YEAR TRENDS

Key Stakeholders Describe Rosslyn More Positively Over the Years



When we first started the survey in 2016, the top answers to the question, “What are three words you would use to describe Rosslyn?” generally included positive words like “convenient” and “accessible,” but also included a clearly negative word, “boring.” In 2017, there was a shift away from the negativity with the inclusion of more positive words like “growing,” “fun”, and “safe.” This progress has carried through to 2018 with the inclusion of the same positive descriptors from last year as well as the resurgence of “busy” from 2016, a nod at the bustling community.

Perceptions of Play and Entertainment Have Improved the Most Since 2016

Compared to 2016, the largest improvement collectively across resident, employee, and visitor groups has been in the perceptions of Rosslyn as a place to play and for entertainment.

Residents Especially Recognize Rosslyn’s Growth

As referenced above, growth was a new trend that emerged in 2017 and has continued in 2018. The clearest evidence is seen in how residents describe Rosslyn. Some of the most common descriptors in 2018 for this group included key words such as “growing,” “coming,” “fun,” and “location” — all of which build upon the progress the Rosslyn BID has accomplished over the past couple years.

Rosslyn as a Place to Work Continues as the Most Positive Category

Rosslyn as a place to work remains the most favorable category across all stakeholder groups for the third year. 98 percent of employees, 83 percent of visitors, 82 percent of residents, and 77 percent of non-visitors agree that Rosslyn is perceived as a place to work. Compared to 2017, thoughts and sentiments have improved consistently across all stakeholder groups, with a four-percentage-point increase in agreement for both residents and visitors and a two-percentage-point increase in agreement for employees and non-visitors.

Grocery Needs Are Stronger

While more or better grocery options were among the top desires in 2017, this year saw an increased demand, especially among employees and visitors. When asked about more variety in retailers, 60 percent of all those that live, work, and/or visit Rosslyn agreed, up 11 percentage points from 49 percent in agreement in 2017. When looking at the visitor stakeholder group, there was an increase in this desire by 15 percentage points. This trend for more or better grocery options is also evident when respondents were describing how they envision the future of Rosslyn. The topic of groceries comes up in the top responses for employees and visitors, which is new compared to 2017.

Hours of Operation Are Back

Compared to both 2017 and 2016, longer hours of operations of are increased interest. Agreement that longer hours would get people to spend more time in Rosslyn increased by six percentage points, from 52 percent in 2017 to 58 percent in 2018. Additionally, when diving into the answers people wrote in for what they envision the future of Rosslyn to be, the primary focus was on dining and entertainment options particularly within the context of having these things available to them in the evenings and on the weekends.

New Interest in a Bookstore

Survey write-in answers often reveal hidden trends in stakeholders’ needs and wants. When asked to indicate which type of retailer people wanted to see more variety of, a new desire emerged with a group of people who wrote in “bookstore” in the “other” answer option. Compared to 2017 in which only three respondents (three percent of write-in answers) specified a bookstore, 11 respondents (10 percent of write-in answers) were vocal about this wish list



item. Despite a relatively low volume of respondents, the seven-percentage-point increase speaks to this new interest in 2018. Considering the BID's 2018 pop-up programming that included The Alcove, a bookstore and community space, it is interesting to see potential connections or implications of that particular program.

Parking Appears to Be a Bigger Barrier

Similar to 2016 and 2017, parking remains one of the top pain points prohibiting people from spending more time in Rosslyn. The same is true for how people envision the future of Rosslyn — better parking. What is especially telling is how parking has moved up in importance not only in becoming the number one barrier for visitors and non-visitors, but also in how non-visitors view Rosslyn, with parking as a new descriptor this year. While generally a neutral word, when considering the other survey questions with parking-related answers for non-visitors, parking as a descriptor takes a negative connotation.

Shopping Has Mixed Results from Last Year but is Still Better than 2016

While the shopping category saw the largest shift in perception between 2016 and 2017, perceptions from 2017 to 2018 have seen more inconsistent results. While residents' perceptions of shopping continue to improve with negative perceptions shifting by four percentage points from 63 percent down to 59 percent, employees', visitors', and non-visitors' perceptions have declined by two to seven percentage points since 2017. However, despite the varying degrees of differences from 2017 to 2018 across all stakeholder groups, the perception of shopping has shifted, decreasing in negative thoughts by six percentage points and increasing in favorable thoughts by three percentage points since 2016.

KEY STAKEHOLDER AREAS OF INTEREST

There were several underlying themes that played a role in understanding perceptions and shifting sentiments of Rosslyn. As we examined the themes further, three top areas of focus emerged.

Rosslyn Works

In addition to the positive perceptions of Rosslyn as a place to work from all stakeholders, the primary users of the Rosslyn workplace show strong support of this idea. Employees are increasingly more happy working in Rosslyn, with 93 percent feeling positive about working in Rosslyn in 2018, up from 91 percent in 2017 and 87 percent in 2016.

In terms of specific benefits to working in Rosslyn, 90 percent of employees agree that metro/bus accessibility is the top work perk. Another work perk was lunch options, which saw an improvement of five percentage points from 2017, up from 79 percent to 84 percent in agreement. Some employees even highlighted events in the park or on the plaza as specific work benefits in the write-in "other" answer option.

The BID will build awareness for networking events or classes that appeal to employees, create programming after work that encourages workers to linger, and continue to position Rosslyn as both an attractive place to work and live. The BID will also encourage community members to be vocal champions of the Rosslyn community.

Outside the 9-to-5

While Rosslyn is a great place to work, it is not only a place to work. People want reasons to stay in Rosslyn in the evenings or go there on the weekends, as evident in how survey respondents addressed a lack of things to do — in terms of options in the evenings and on the weekends — as the main reason why they do not spend time in Rosslyn.



In terms of attracting people to Rosslyn, 85 percent of all respondents agree — and specifically 75 percent of non-visitors — that more entertainment would get them to spend more time in Rosslyn.

The BID will highlight Rosslyn as a growing urban community that connects with audiences beyond the workforce. The BID will continue to invest in inclusive programming that appeals to various stakeholders and utilize pop-up events and activities in the evenings and on the weekends for better flexibility.

Options, Options, and More Options

A continual theme over the past three years, desire for more or better food and entertainment options remains a central focus. As for food-related options, limited sit-down dining was the most commonly perceived obstacle to spending more time in Rosslyn, and 77 percent agreed that specifically more sit-down dining would encourage them to spend time in Rosslyn. This theme carries over into shopping for food as well, as 60 percent of all stakeholders agreed they want better grocery options, up 15 percentage points from 45 percent in 2017.

As for entertainment, 85 percent think more entertainment would get them to spend more time in Rosslyn and 68 percent highlighted bars/nightlife as ways to get them to spend more time in Rosslyn. When it comes to the specific BID-run programming, people enjoyed the seasonal events and were vocal about wanting more of those in the future.

The BID will build awareness of existing dining, entertainment, and shopping through engaging online social campaigns that highlight what is in Rosslyn. The BID will also continue to run and support the recurring farmers market to help address the unfavorable grocery sentiments.

Thank you to everyone who participated in the 3rd Annual Rosslyn Perception Survey. The BID staff will be incorporating the data and key takeaways presented in this report into its strategic planning process and future programming as it strives to make Rosslyn a great place to live, work, and visit.

