



GREATER  
WASHINGTON  
PARTNERSHIP

FROM BALTIMORE TO RICHMOND  
FOSTERING UNITY  
ADVANCING GROWTH

# CAPITAL REGION AMAZON IMPACT STUDY

March 2019



GREATER WASHINGTON PARTNERSHIP

FROM BALTIMORE TO RICHMOND.  
FOSTERING UNITY. ADVANCING GROWTH.



**brightline**  
strategies

# INTRO AND METHODOLOGY

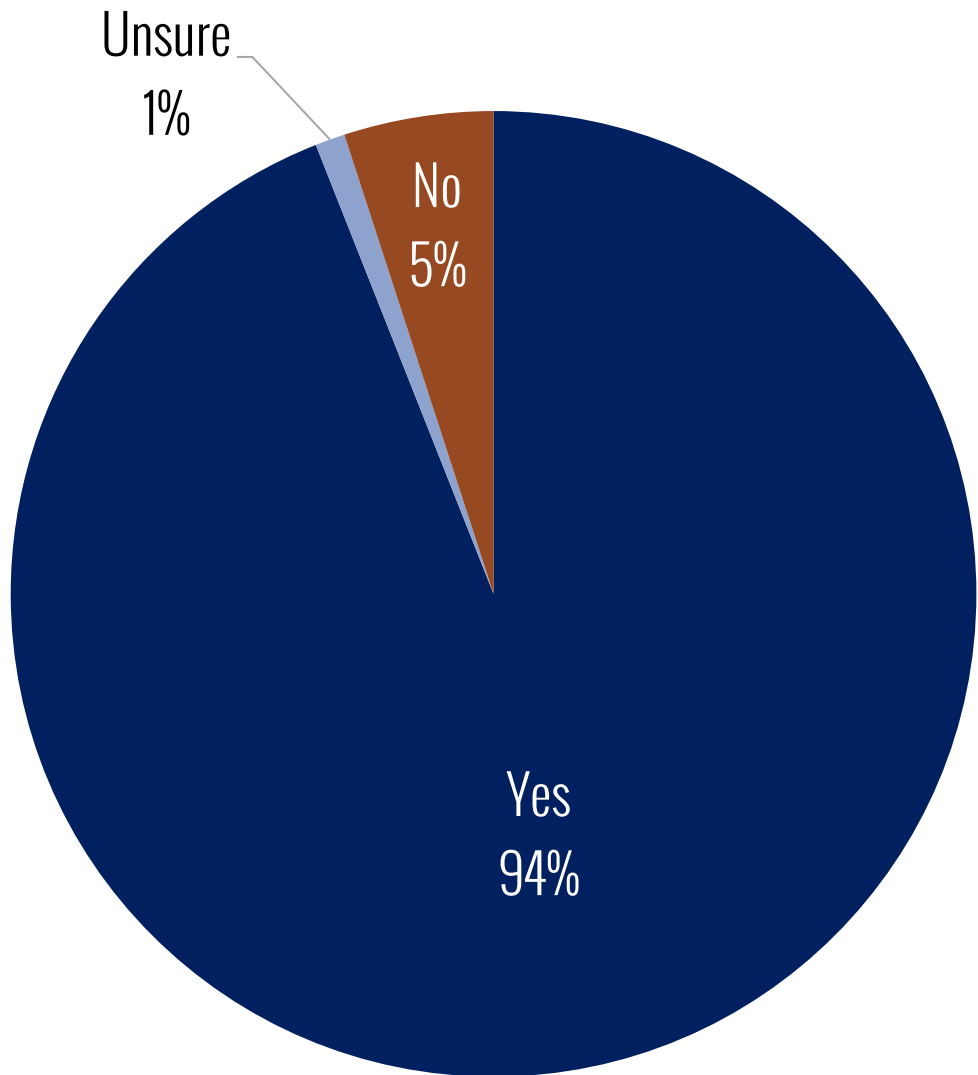
- Greater Washington Partnership engaged Brightline Strategies to conduct a survey of DC, MD and Northern Virginia voters' views on Amazon's decision to locate its second headquarters (HQ2) in Arlington, VA.
- The survey consisted of phone interviews with N=565 registered voters in DC, MD and Northern Virginia between February 28 and March 12, 2019
- The survey included a sub-sample of n=155 voters in Arlington County, VA
- The overall margin of error associated with a sample of this type is +/- 4.1% in 95 out of 100 cases.



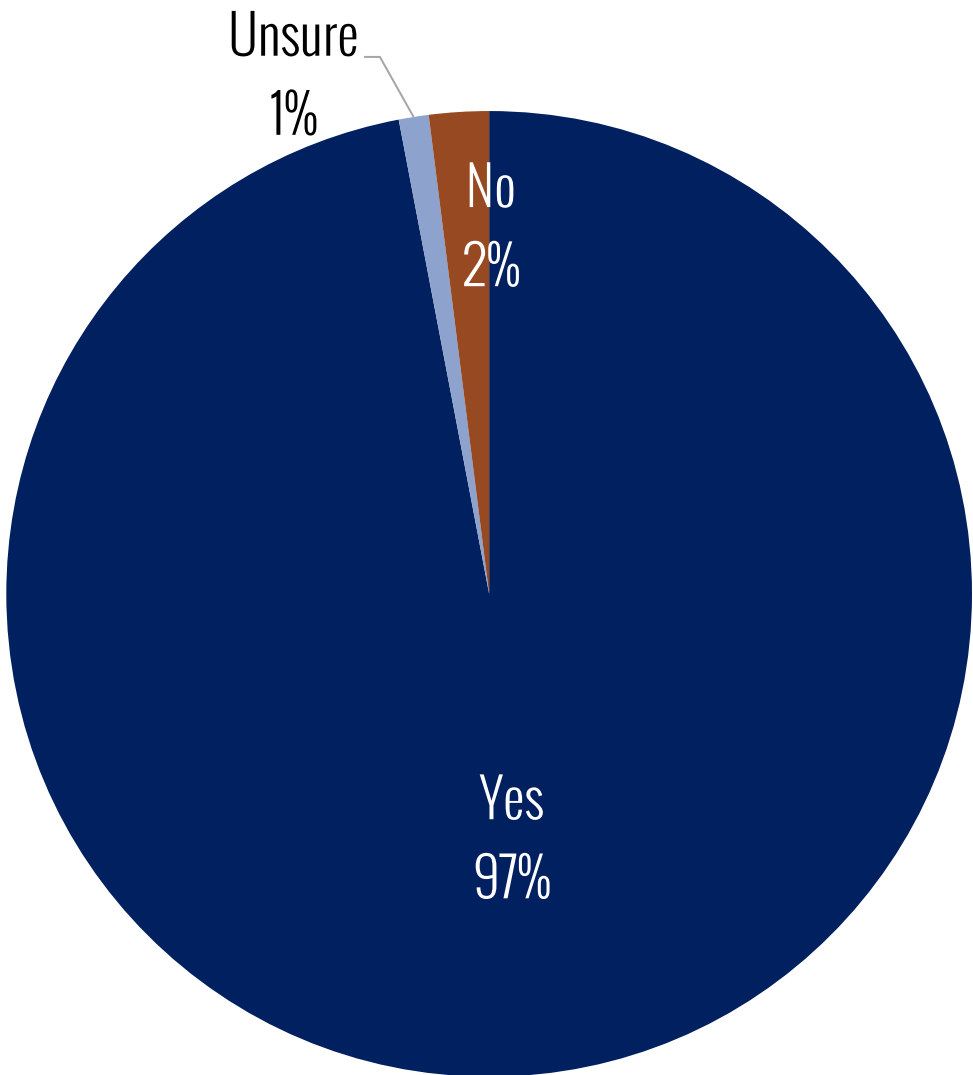
# AWARENESS OF AMAZON LOCATION DECISION

**Q:** Have you seen, read or heard anything about Amazon's planned establishment of a second headquarters in Arlington, VA?

**All DC / MD / VA Respondents**



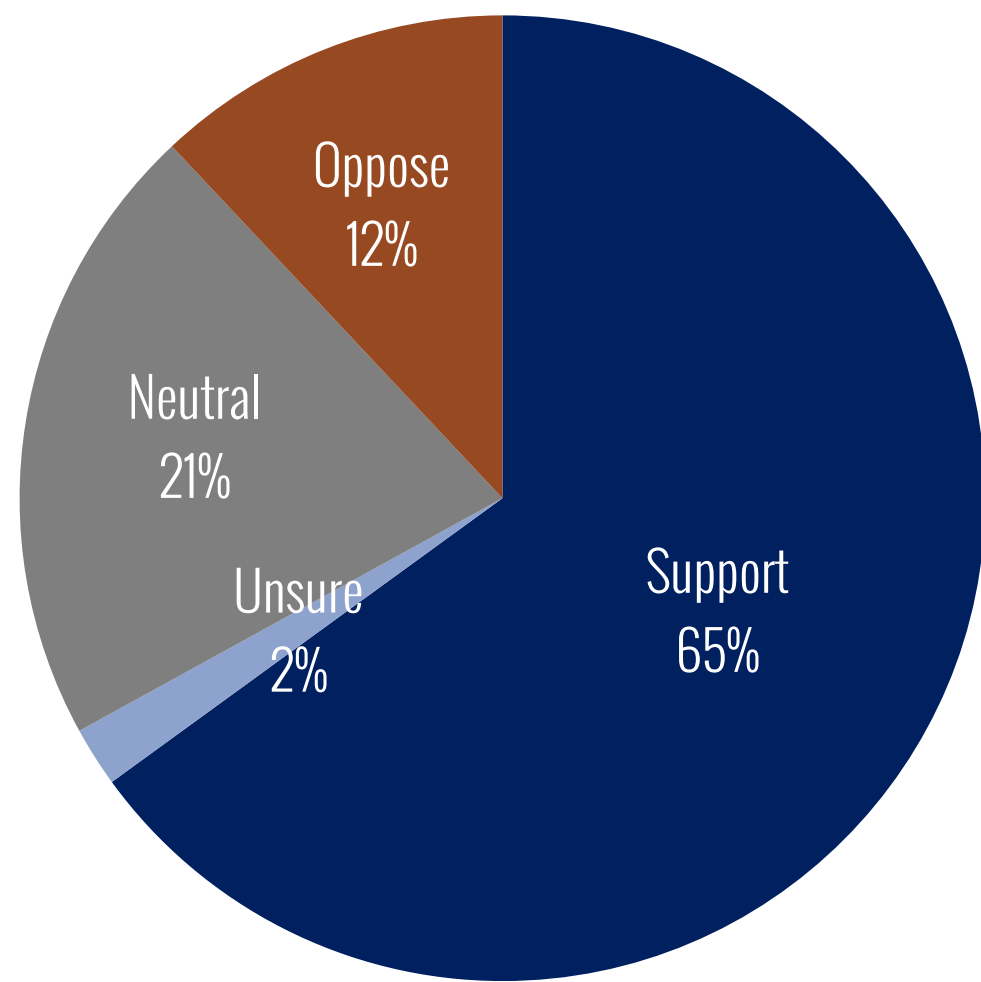
**Arlington County Only**



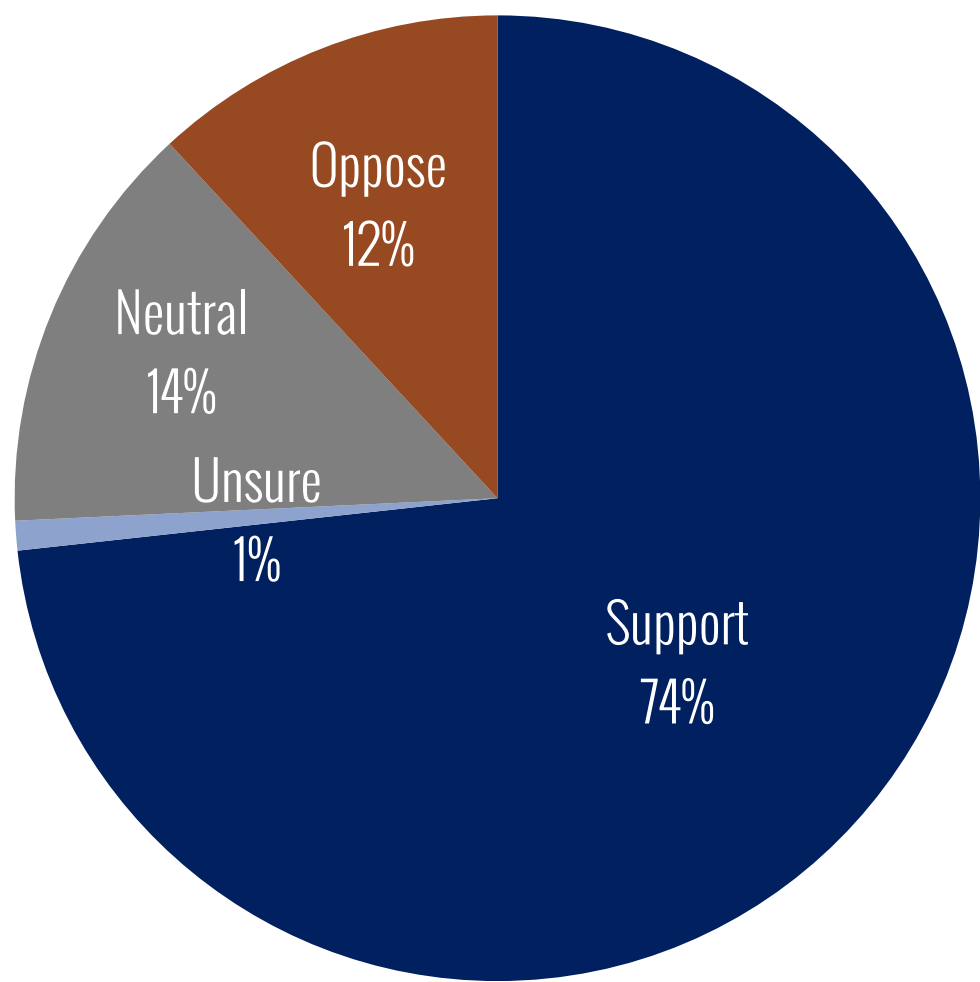
# SUPPORT FOR AMAZON LOCATING IN ARLINGTON

**Q:** Do you oppose, support or are you indifferent to this move?

**All DC / MD / VA Respondents**



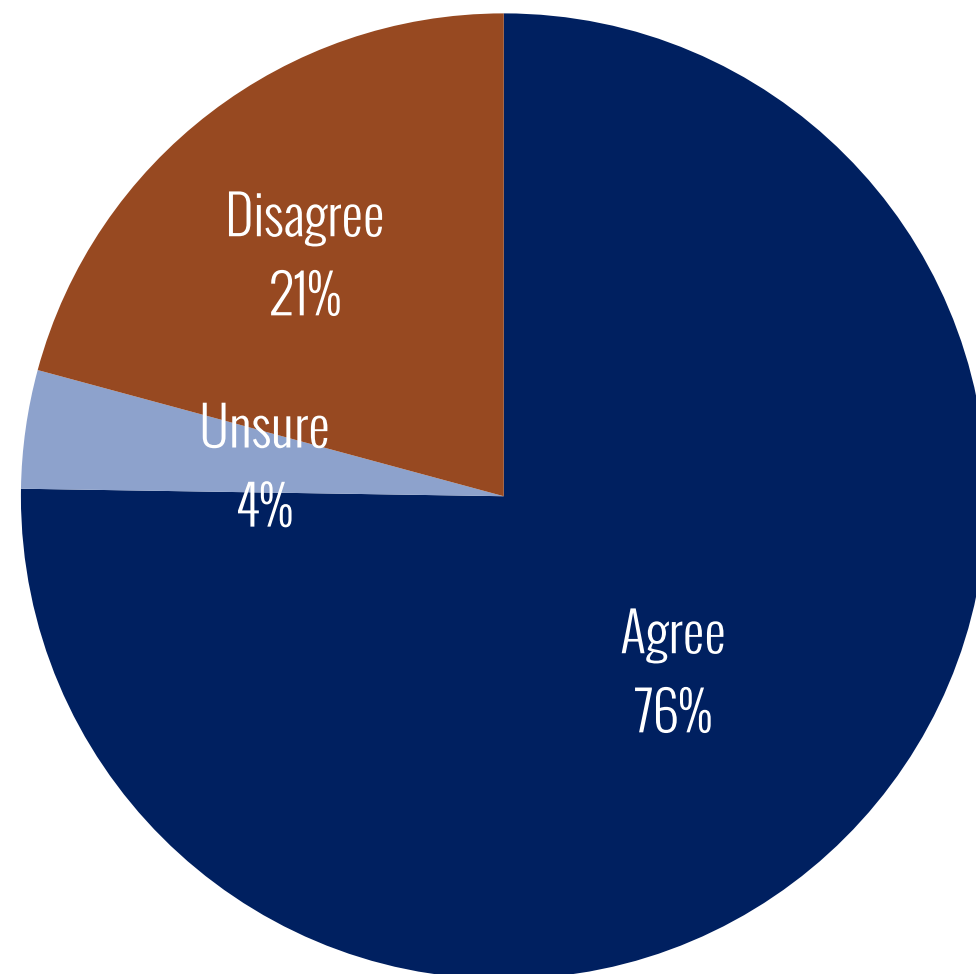
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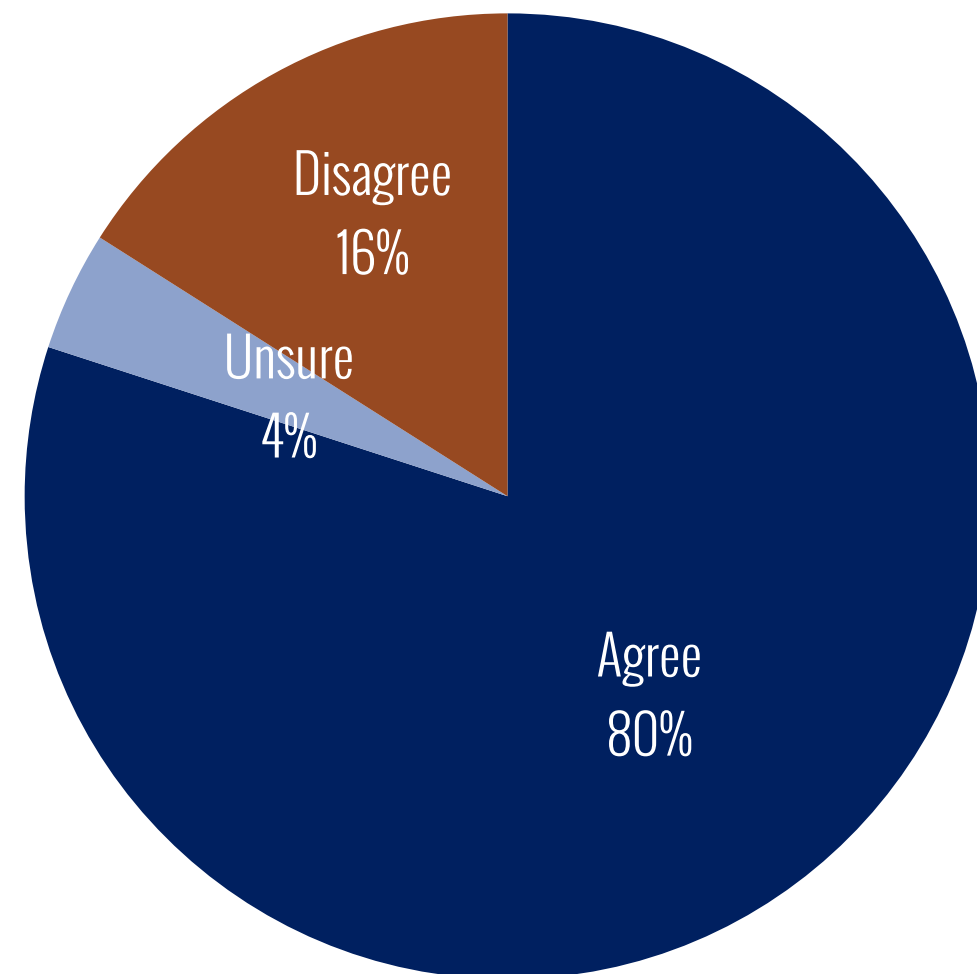
# AMAZON AS A “WIN” FOR THE REGION

**Q:** Do you agree or disagree with the following statement: “Amazon deciding to locate its HQ2 in Arlington, Virginia is a “win” for the entire DC, Maryland and Virginia region.”

**All DC / MD / VA Respondents**



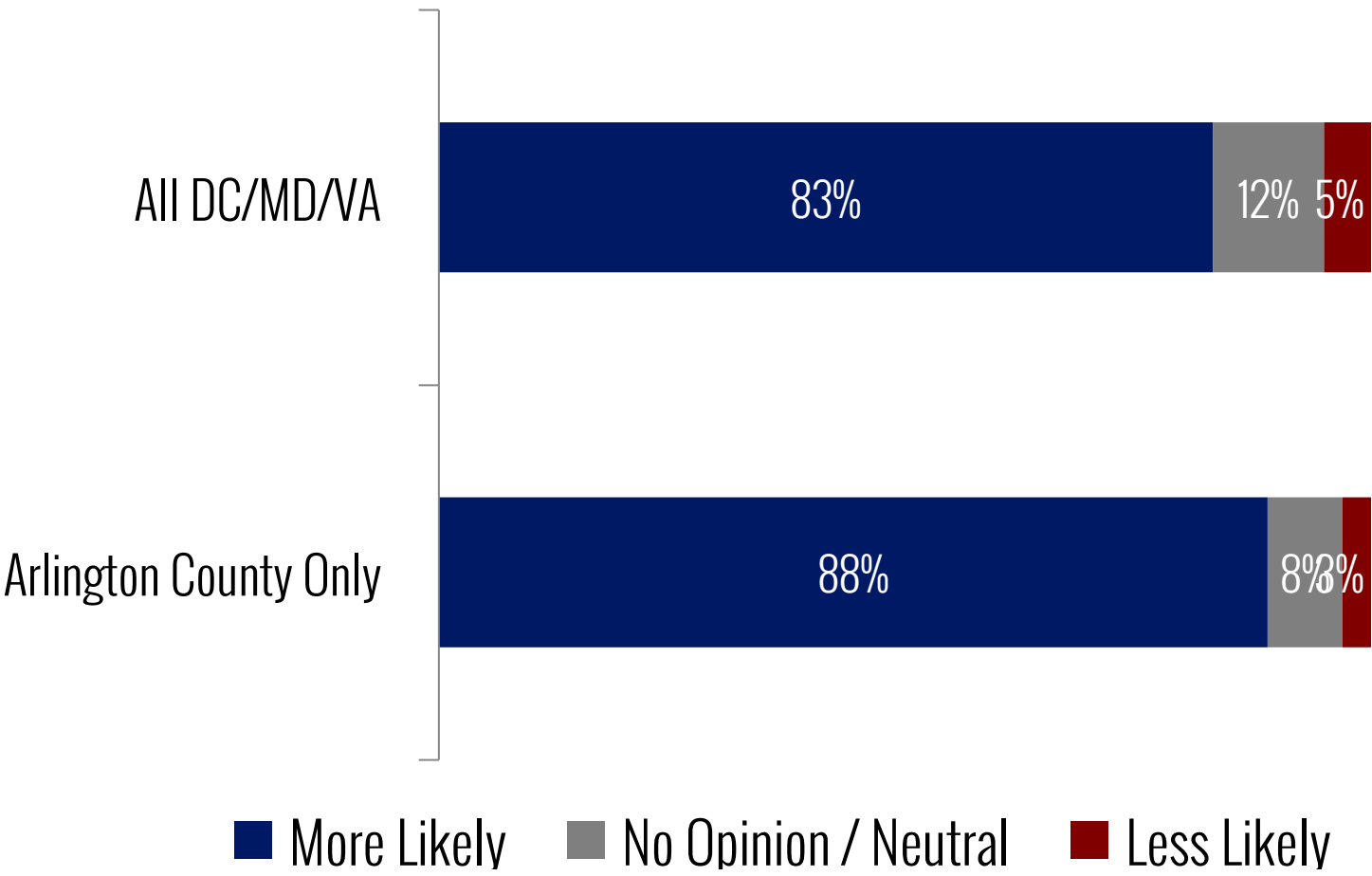
**Arlington County Only**



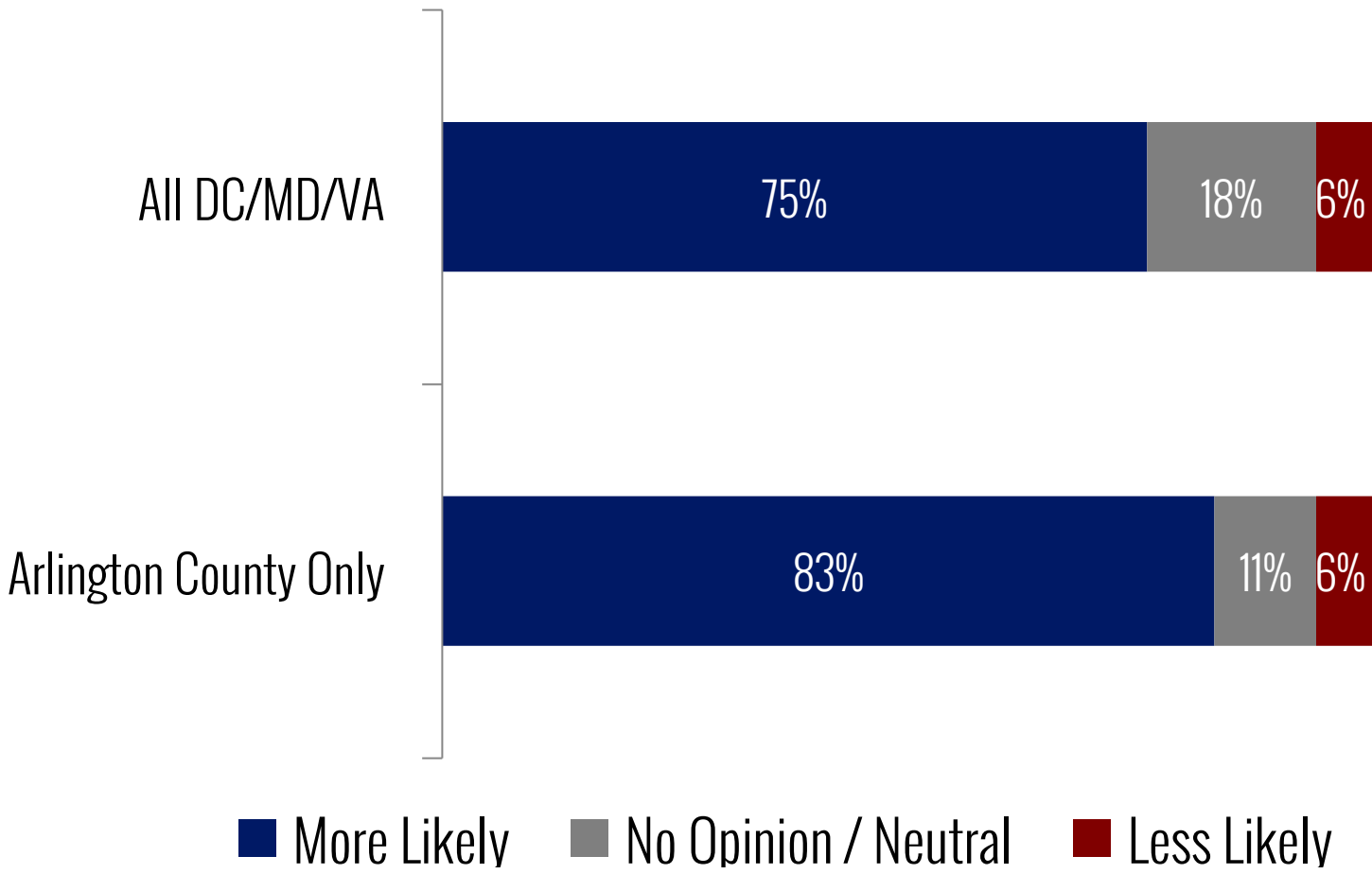
# JOB CREATION / REGIONAL GROWTH IMPACTS

**Q:** Consider the following more generic impacts that might arise from Amazon locating its headquarters in National Landing in Arlington, Virginia. Please listen as I read them and indicate if you'd be more likely to support Amazon relocating to this area, less likely or if it would make no difference.

“Creation of New Jobs”



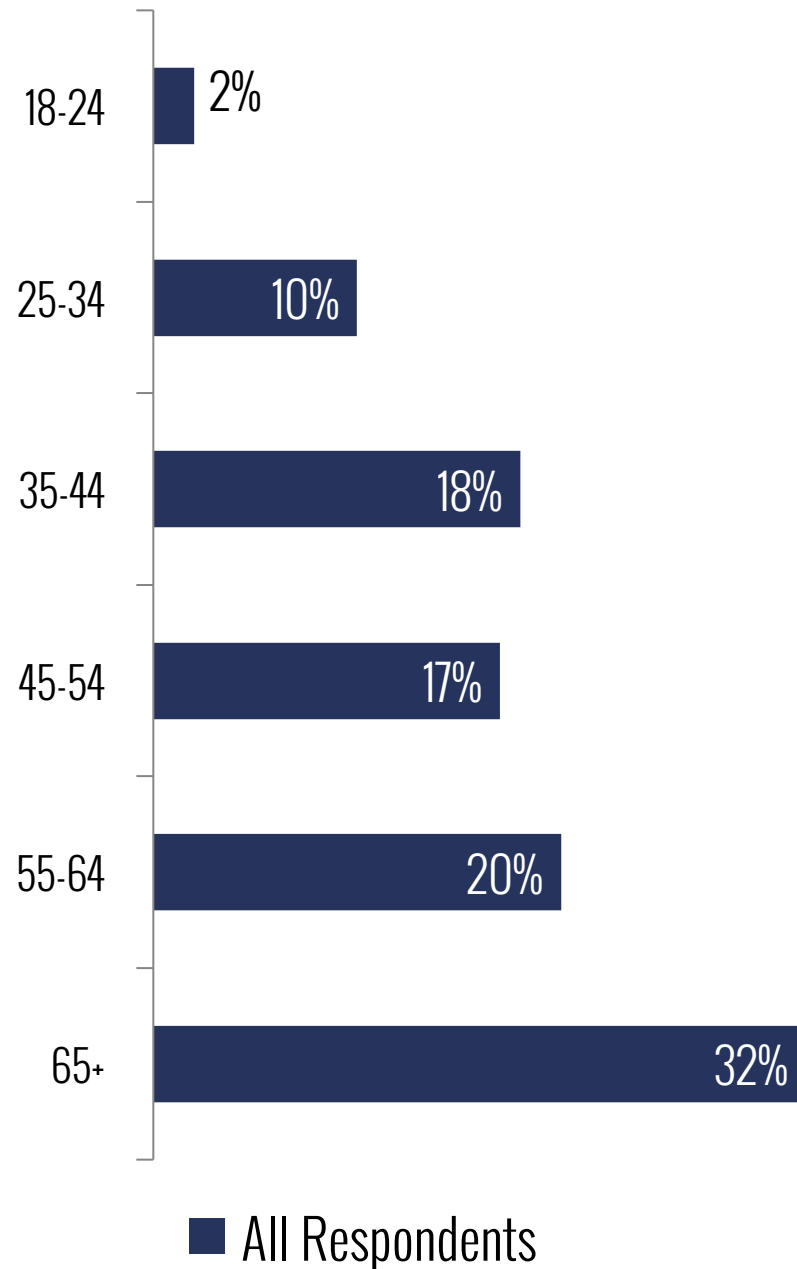
“Regional Economic Growth”



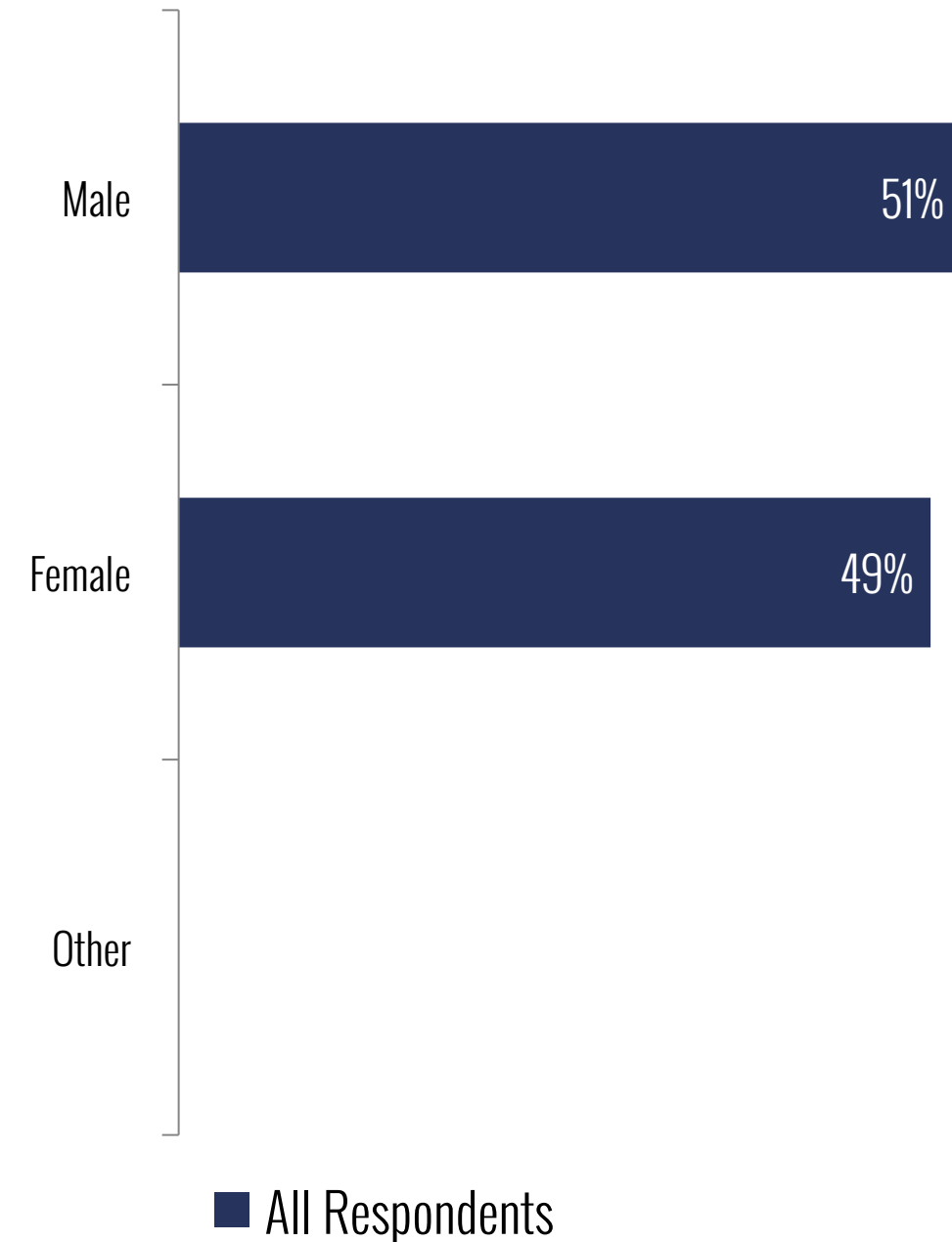


# KEY DEMOGRAPHICS

## Respondent Age

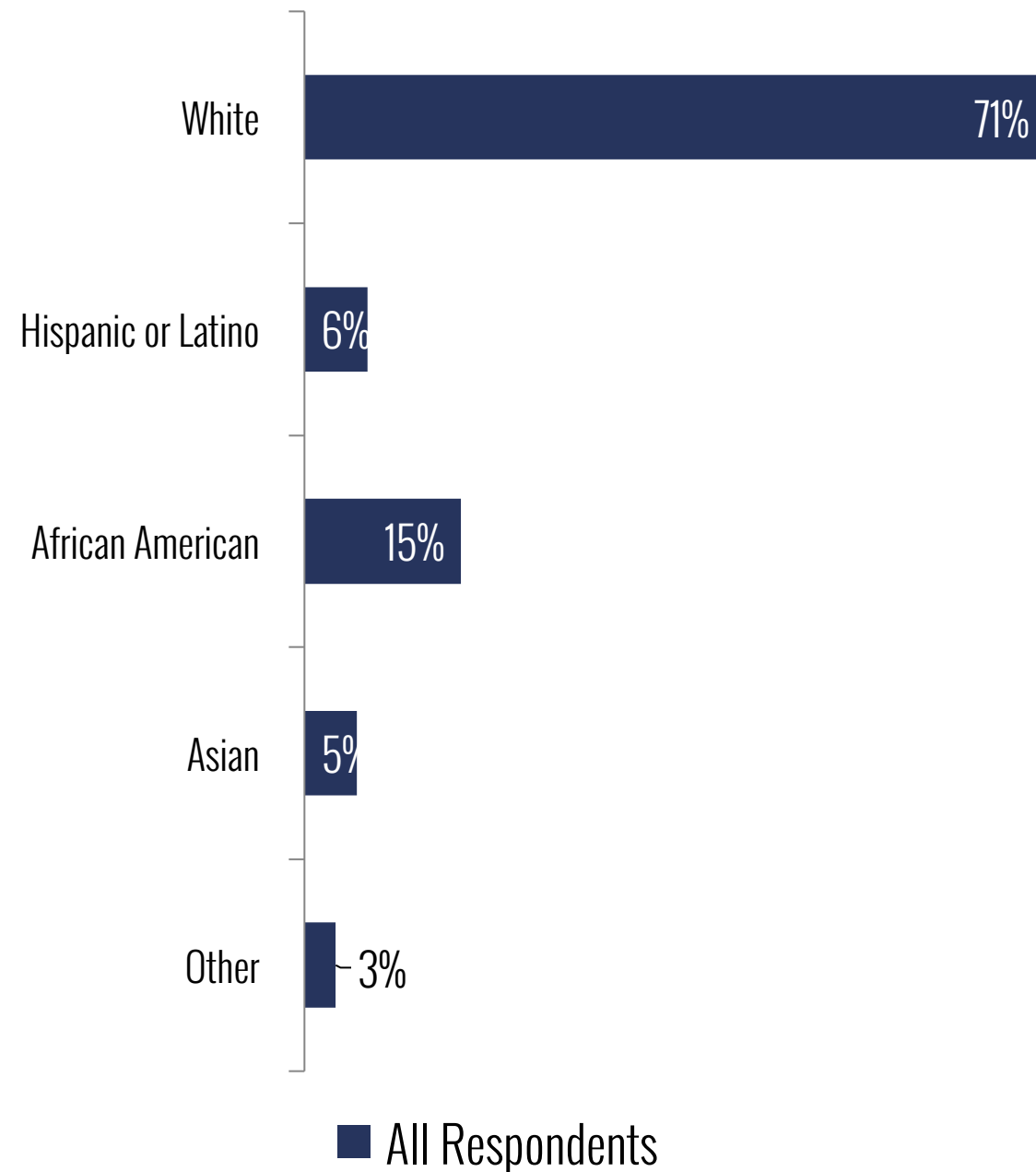


## Respondent Sex

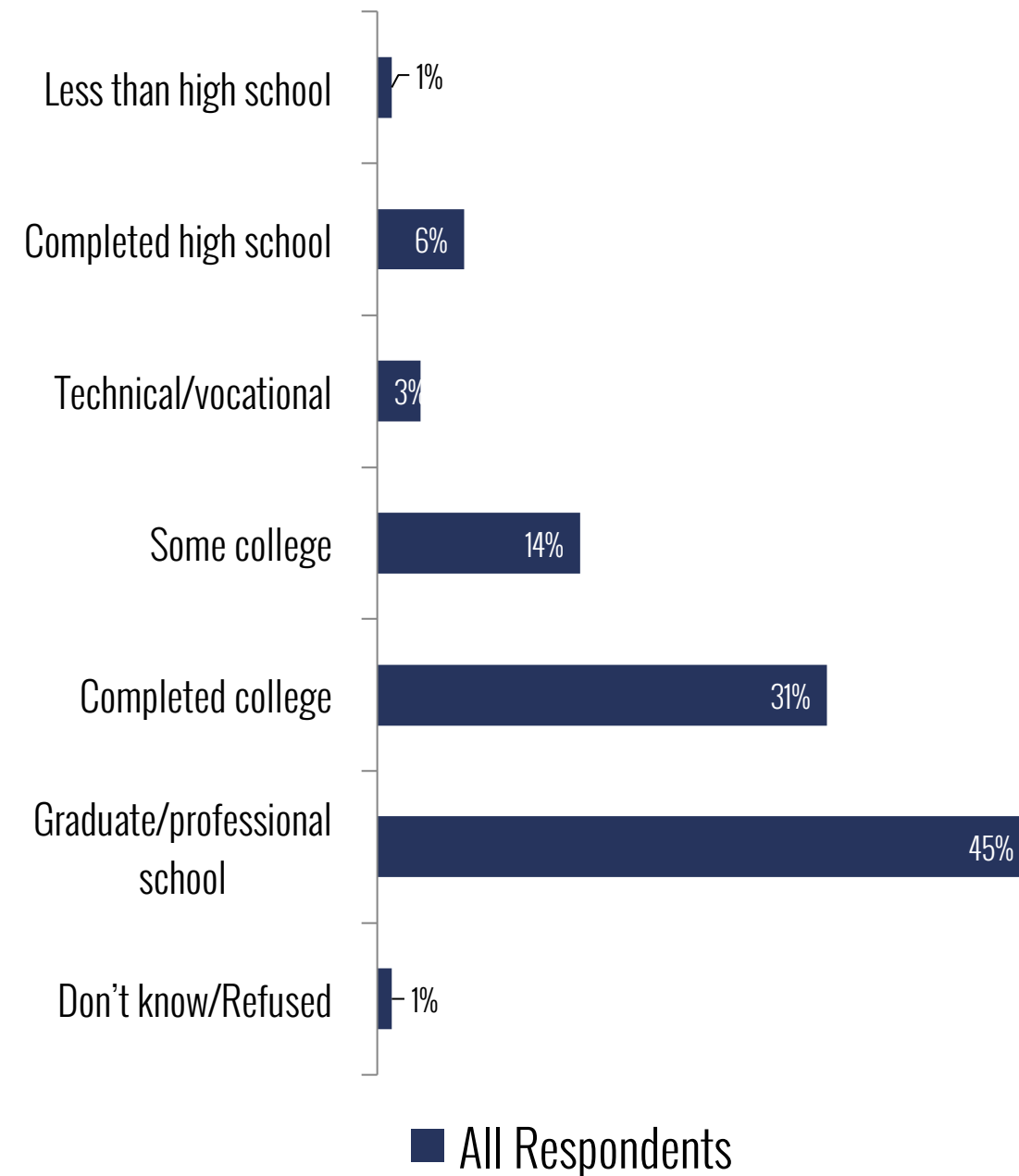


# KEY DEMOGRAPHICS

## Race / Ethnicity



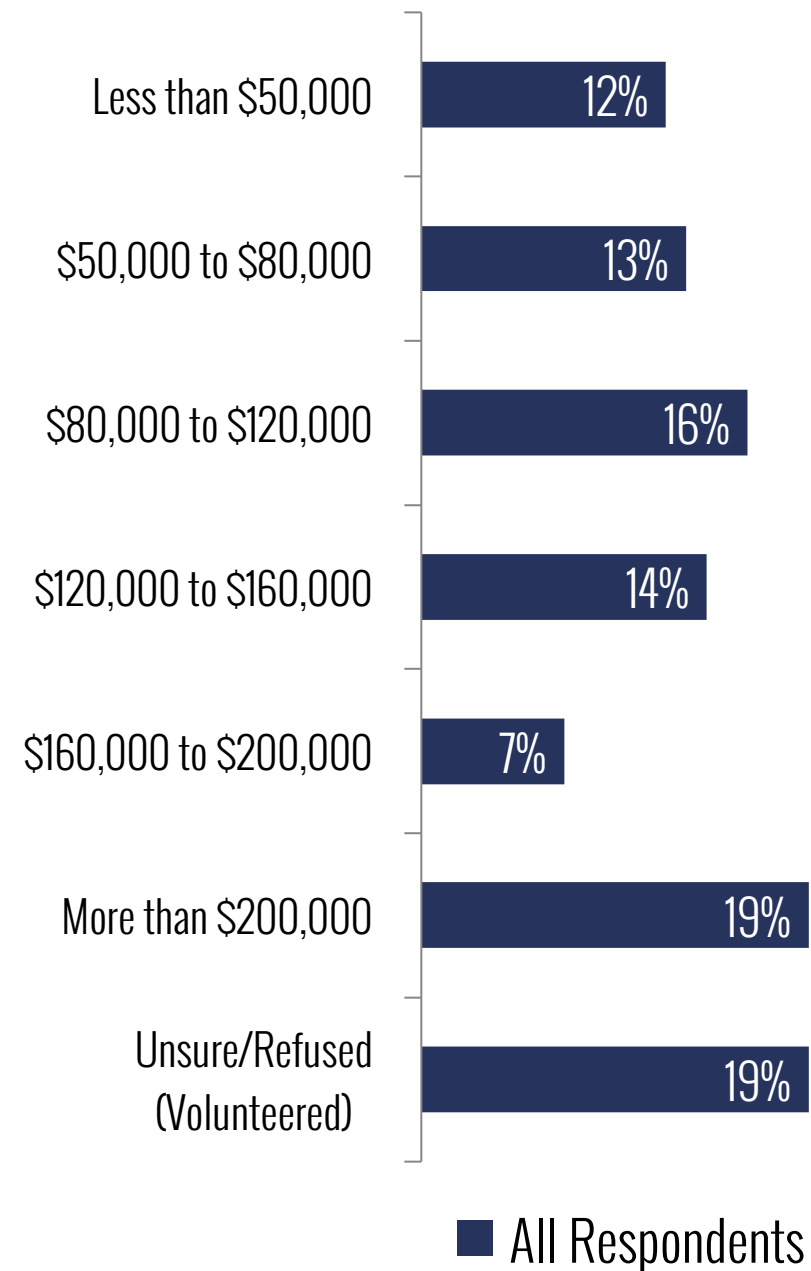
## Education



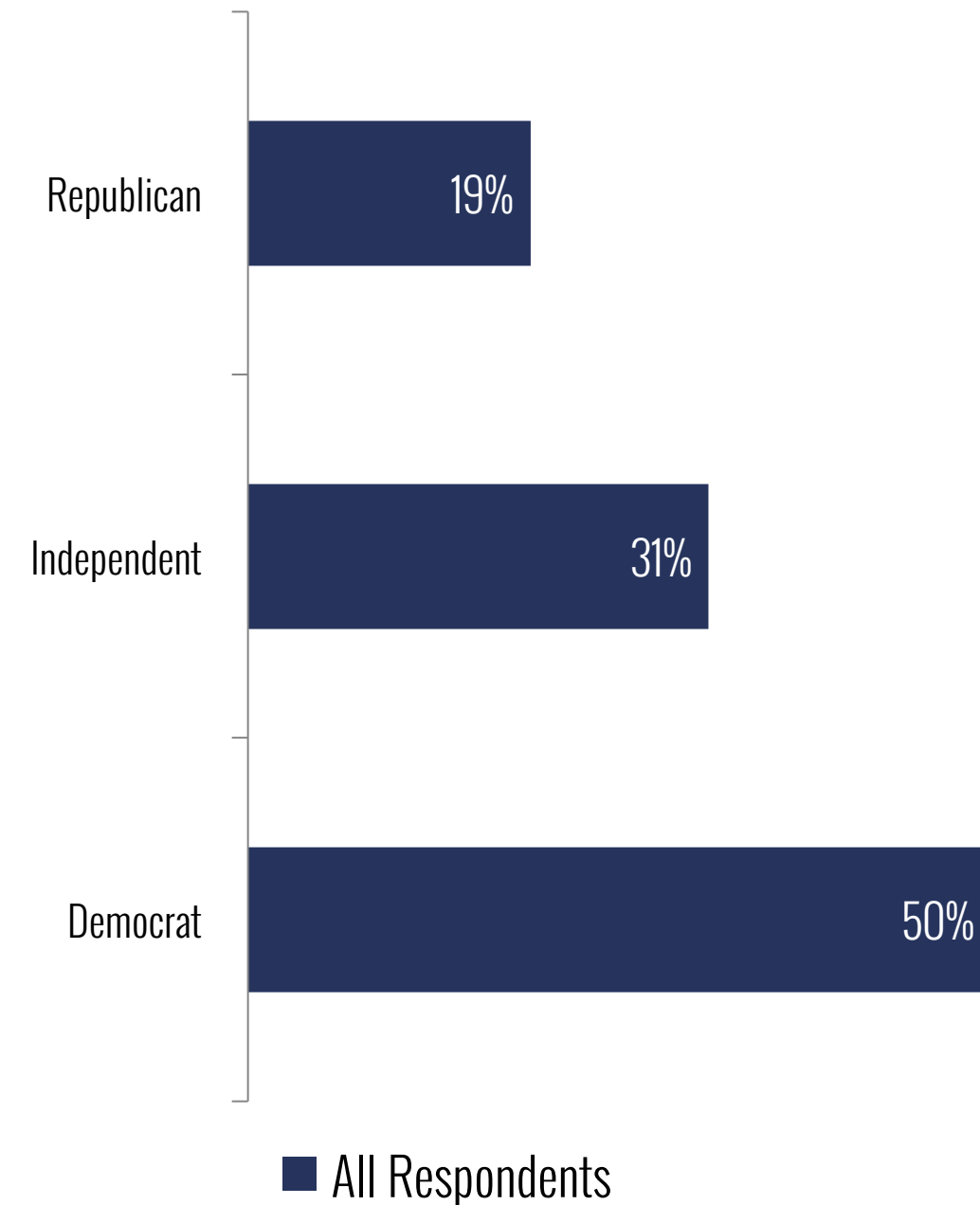


# KEY DEMOGRAPHICS

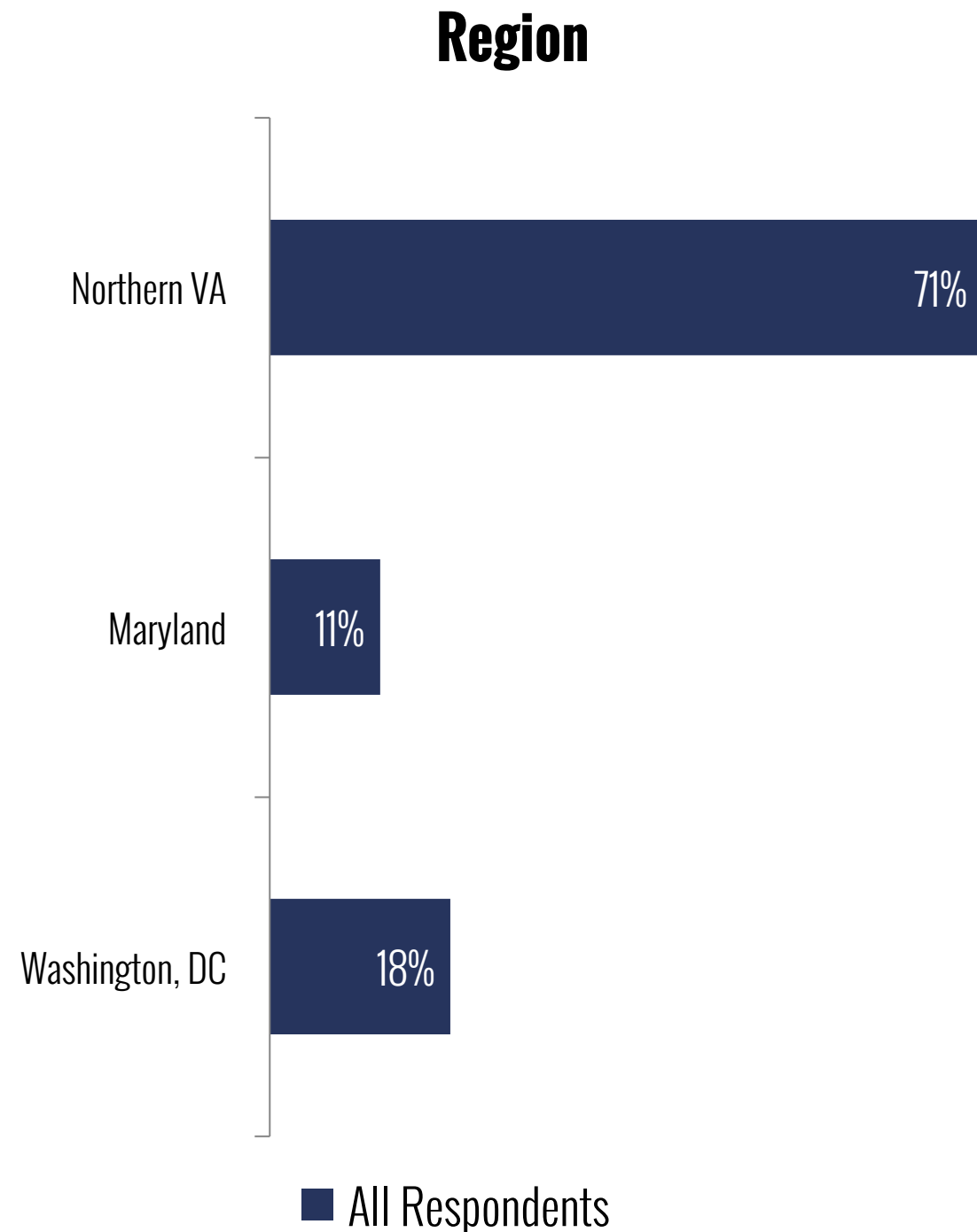
## Respondent Income



## Party Identification (Includes Leaners)



# KEY DEMOGRAPHICS



- Northern Virginia survey respondents included the following proximate counties/jurisdictions and Other NoVA counties:
  - Arlington County
  - City of Alexandria
  - Fairfax County / City of Fairfax
  - City of Manassas
  - City of Falls Church
  - Prince William County
  - Other NoVA Counties: Clarke, Culpeper, Fauquier, Frederick, King George, Loudoun, Spotsylvania, Stafford and Warren Counties
- Maryland survey responses focused in Montgomery and Prince George's County, MD