Competing as an Innovation Community

Some things worth knowing
Some things worth considering

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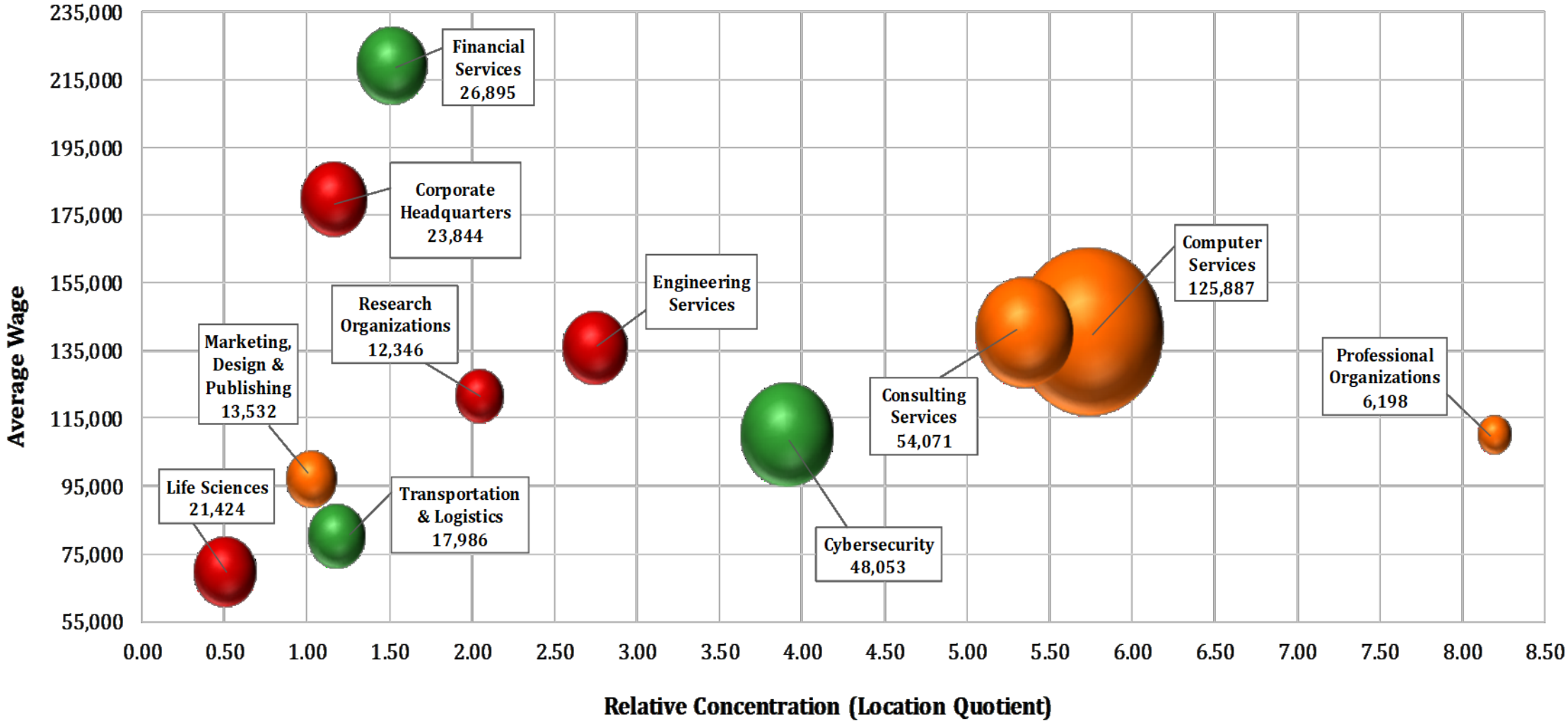
NOVA Industry Clusters July 2019

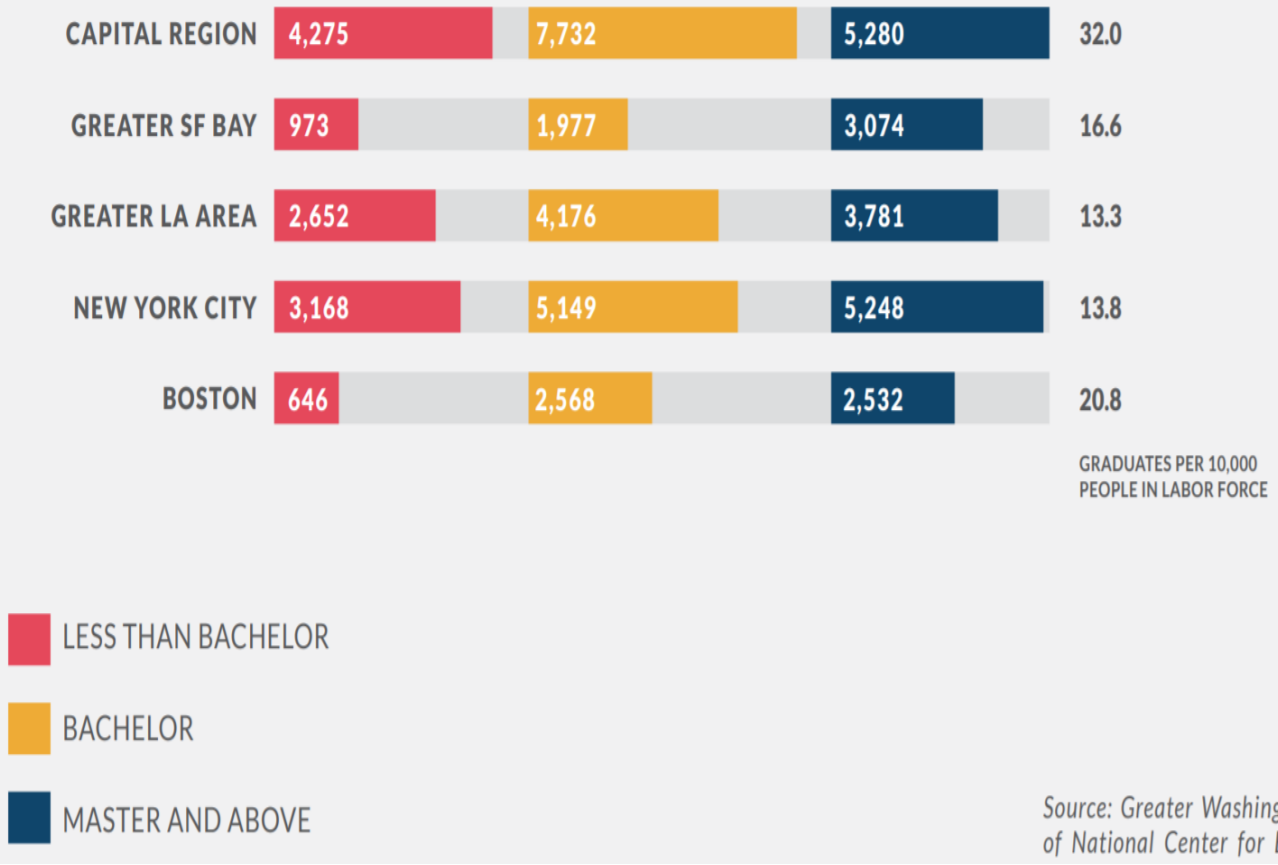


Sources: EMSI, US Cluster Mapping Project, Center for Regional Analysis

Our Region Produces the Most Digital Graduates

We are training people with the skills to compete in the tech economy

DIGITAL TECH-RELATED GRADUATES BY DEGREE AND REGION, 2016

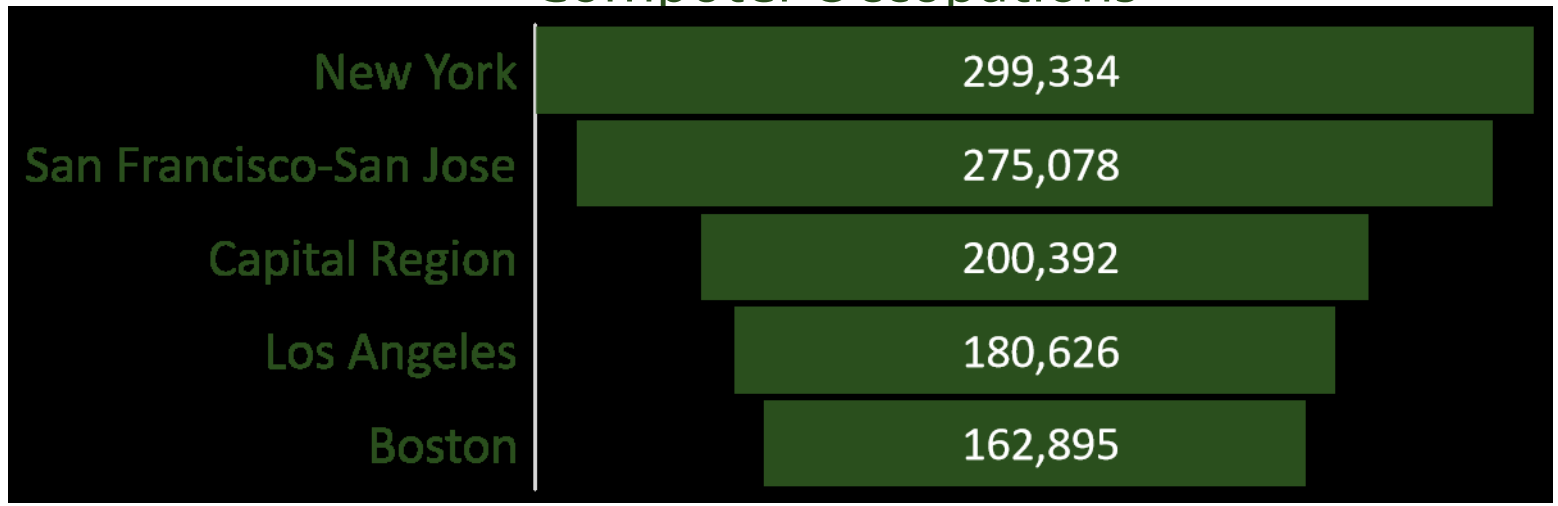


Source: Greater Washington Partnership Analysis of National Center for Education Statistics data

Our Region Lags Behind in Digital Job Creation

Our region is not creating digital jobs at the same levels as competing regions

Computer Occupations



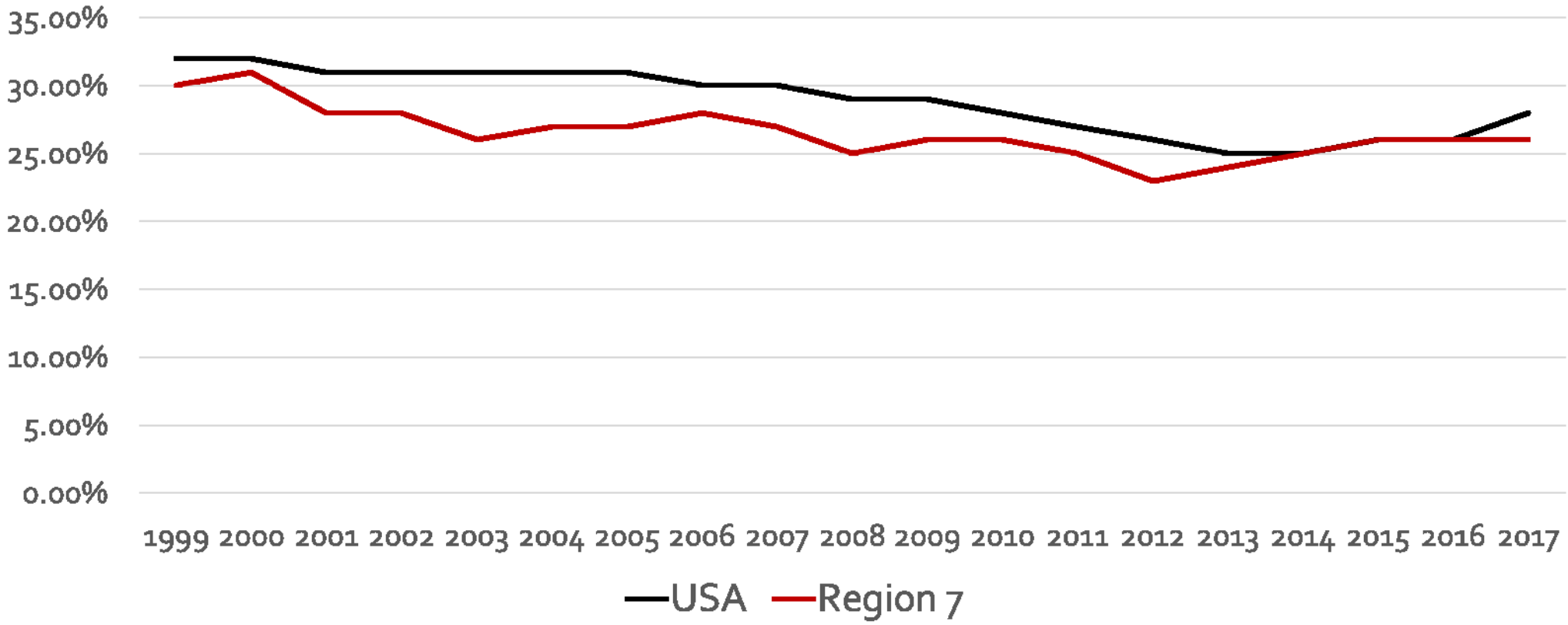
5 Year Job Change (3Q2019)

Source: JobsEQ

Computer Occupations in Northern Virginia, July 2019

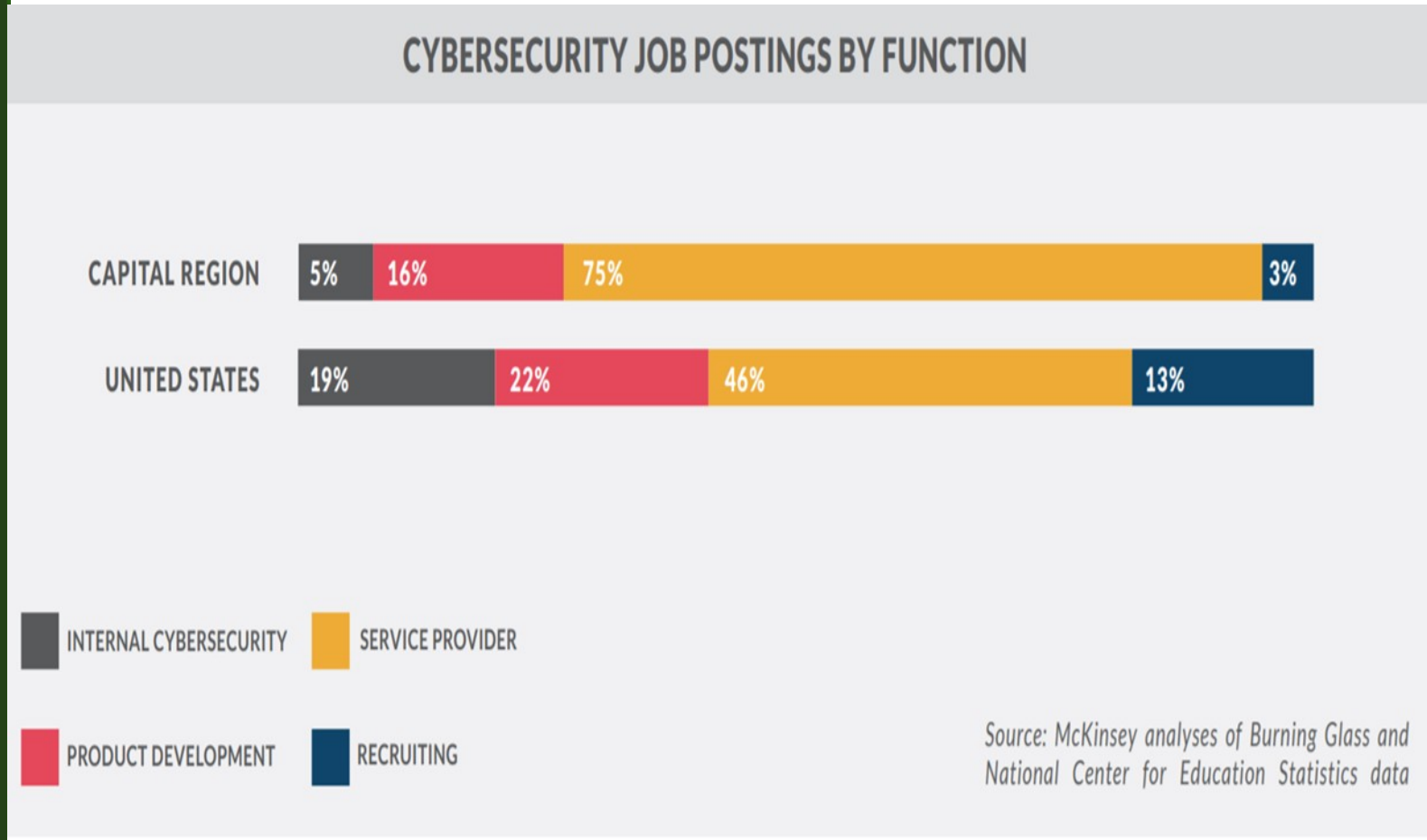
Position Title	2019 Jobs	2019 LQ	Median Earnings	Job CAGR 2012-2019	Projected Job CAGR 2019-2024 *	Current Position Openings *
Software Developers, Applications	25,078	3.11	$113,949	4.7%	8.8%	4,489
Computer Systems Analysts	17,016	3.20	$103,545	1.6%	4.6%	2,766
Software Developers, Systems Software	16,260	4.48	$128,486	-2.1%	1.2%	2,426
Network and Computer Systems Admins	11,304	3.31	$99,344	0.2%	2.0%	2,878
Information Security Analysts	10,284	9.74	$112,559	4.9%	8.3%	2,852
Computer User Support Specialists	9,890	1.61	$61,307	1.4%	3.8%	1,694
Computer Occupations, All Other	8,756	2.92	$110,077	8.3%	9.5%	2,970
Computer Network Architects	6,452	4.45	$126,227	-0.5%	3.6%	764
Computer Network Support Specialists	4,119	2.25	$82,409	-0.9%	2.9%	312
Computer Programmers	3,907	1.78	$98,563	-4.9%	-6.6%	1,031

Percent of Jobs Created by Young Firms



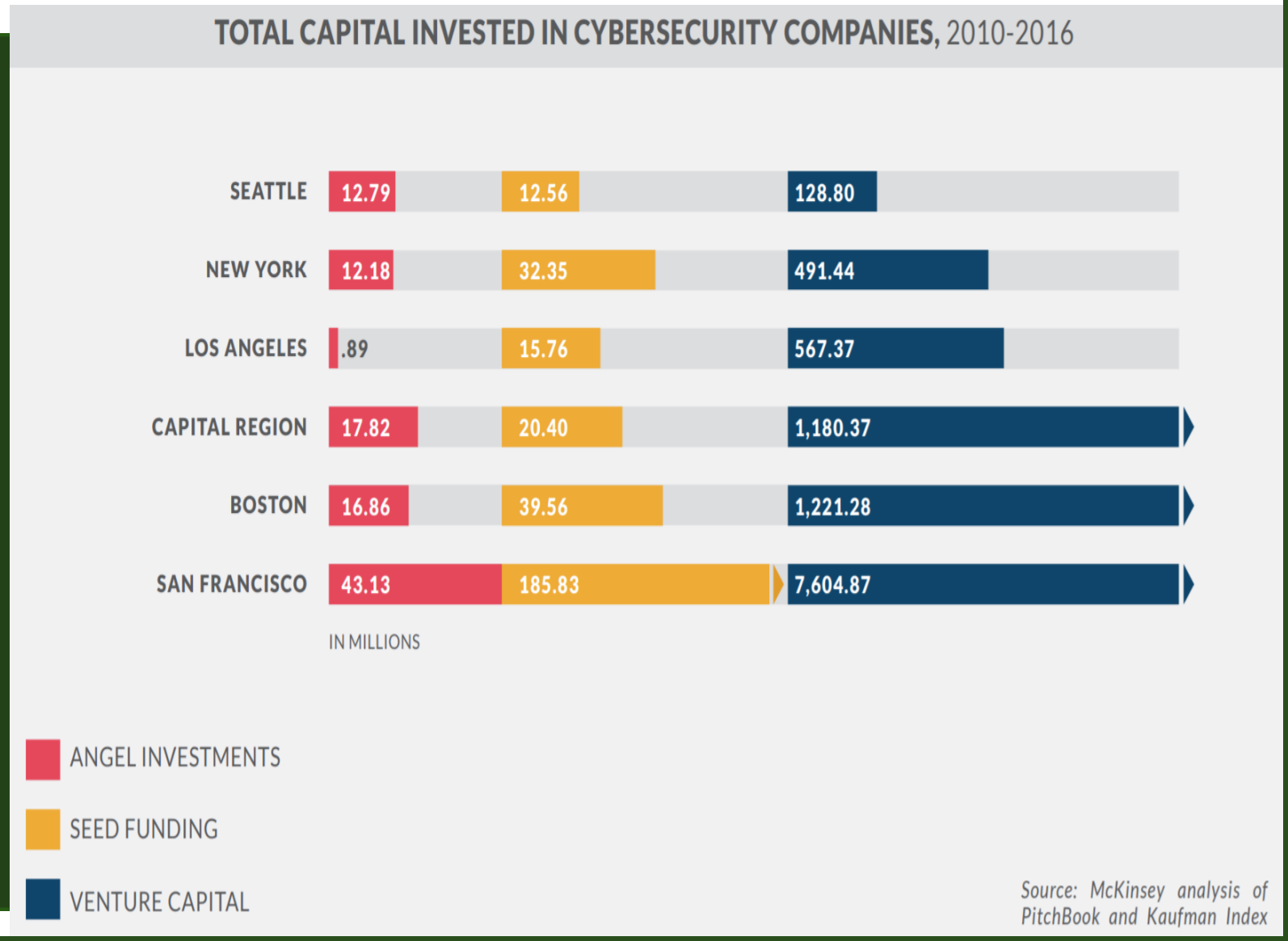
Does Our Over Reliance on Services Harm Us?

Entrepreneurs and investors looking for "big wins" look elsewhere



Follow the Money!

Venture funding is a lagging indicator, but it tells a story of a region that is not keeping up.



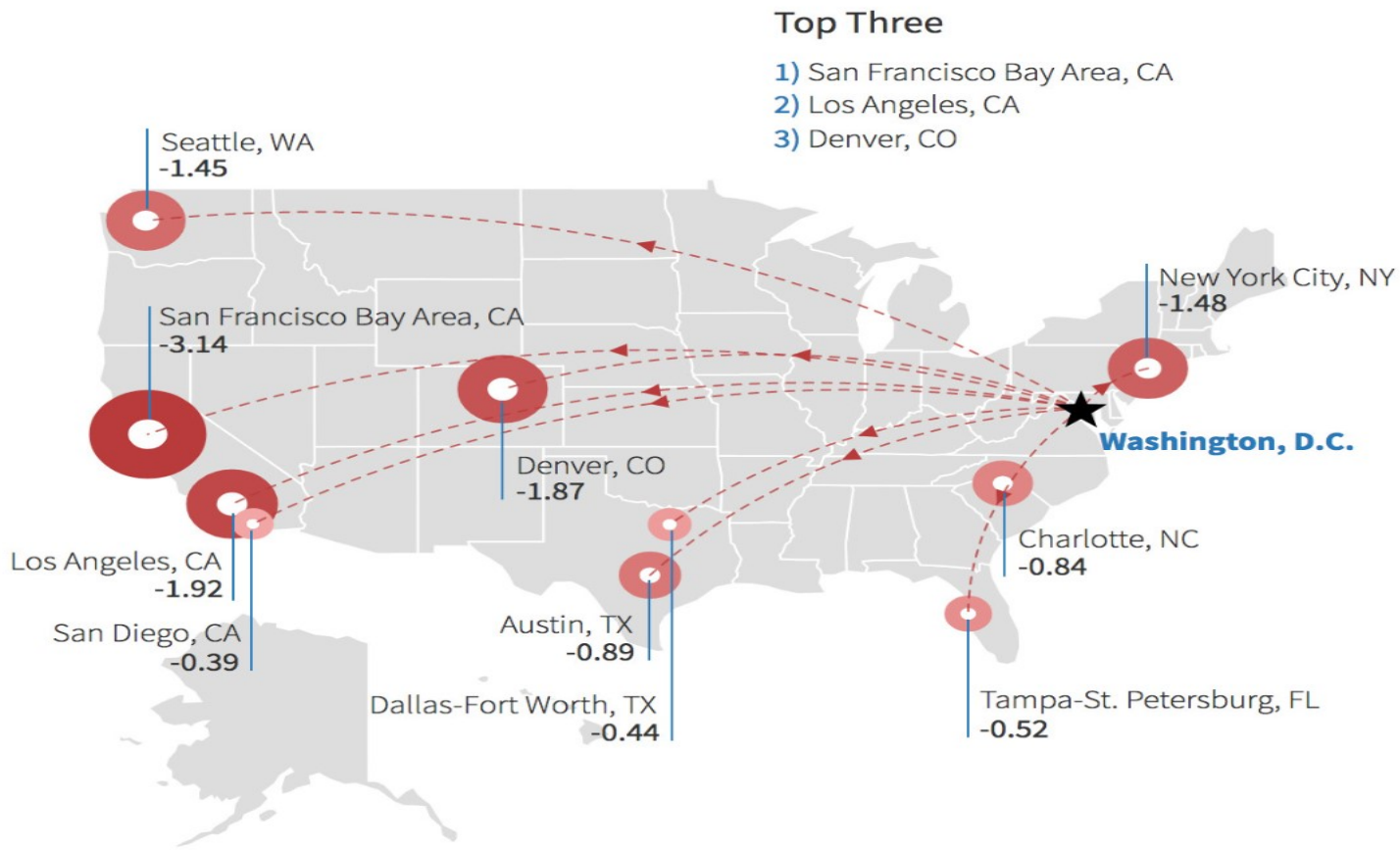
Follow the Workers!

Talent attraction and retention is just as important as development.

June 2019

Cities that Washington, D.C. Has Lost the Most Workers To

Rate per 10,000 Members



We define migration as a member changing their location on their LinkedIn profile. To develop the list of cities that Washington, D.C. lost the most workers to, we identified the cities the most LinkedIn members moved from Washington, D.C. to in the past 12 months. For every 10,000 LinkedIn members in Washington, D.C., 3.1 moved to San Francisco Bay Area in the past 12 months.

Where Are We Most Interconnected?

Revolving door may work to our advantage in attracting talent to the region.

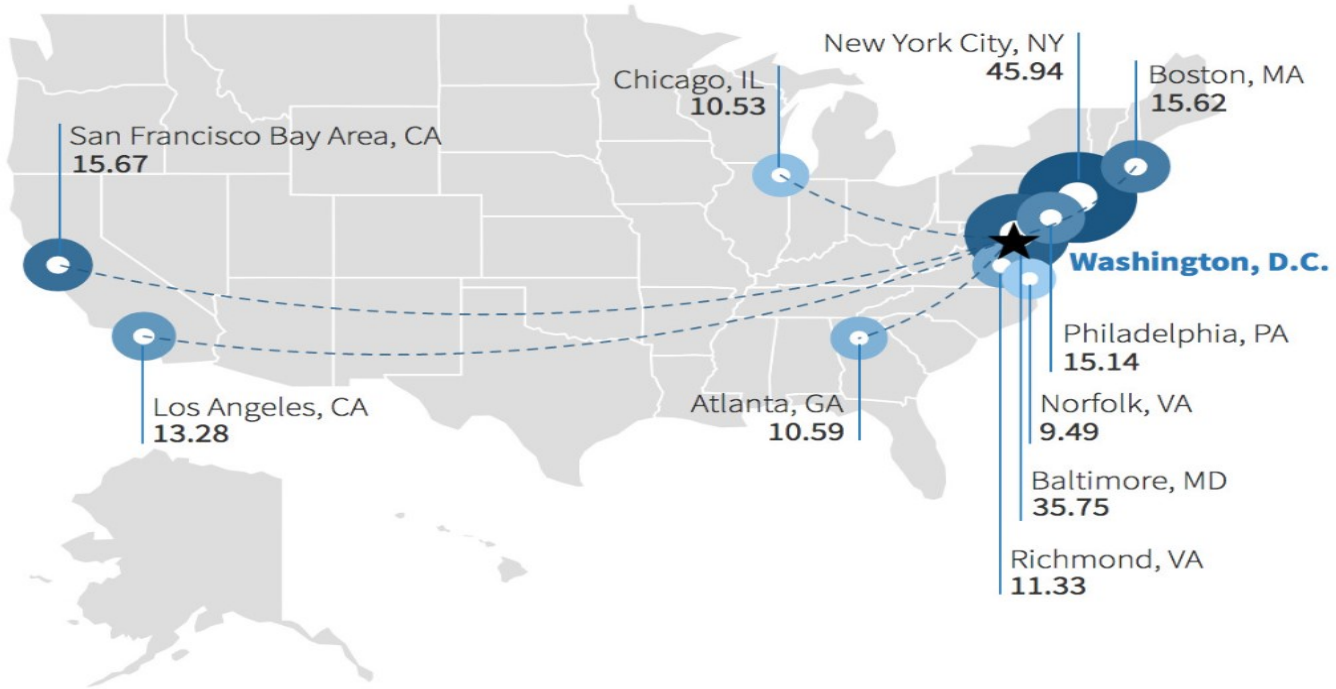
June 2019

Cities with the Most Migration with Washington, D.C.

Rate per 10,000 Members

Top Three

1) New York City, NY
2) Baltimore, MD
3) San Francisco Bay Area, CA



We define migration as a member changing their location on their LinkedIn profile. To develop the list of cities with the most migration with Washington, D.C. we identified the cities the most LinkedIn members moved to Washington, D.C. from in the past 12 months, and the cities the most LinkedIn members moved from Washington, D.C. to in the past 12 months. For every 10,000 LinkedIn members in Washington, D.C., 45.9 moved to or from New York City in the past 12 months.

What Should We Do?

Coordination and cooperation are essential in resourcing and effectiveness of efforts.

- Regional efforts to undertake vertical integration of labor market supply and demand.
- Teach local service innovators to become product innovators.
- Develop a shared regional vision on why this is a place where innovation occurs.
- Entry level housing (can't fix cost of land and materials, but regulatory costs can be addressed).
- Effectually activate universities in the business side of innovation.
- Resist the temptation to legislate innovation and the economy.
- Address characteristics important for Millennials – sorry Gen Xers!
- Focus on vertical integration of big and small businesses in the industries where we excel.
- Create tools to measure regional innovation attributes and progress against policy goals.

Continue the Conversation

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