



OFFICE OF THE COUNTY EXECUTIVE
ROCKVILLE, MARYLAND 20850

Isiah Leggett
County Executive

MEMORANDUM

October 21, 2015

TO: George Leventhal, President
County Council

FROM: Isiah Leggett, County Executive 

SUBJECT: Montgomery County Public Opinion Assessment

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I am attaching for Council review a report commissioned by the Offices of the County Executive and the Department of Economic Development conducted by EurekaFacts, a local, small business located in Rockville, Maryland.

The *Public Opinion Assessment for Montgomery County, MD* is a report that details the results of market research conducted among County residents and businesses, site selectors and commercial real estate brokers, meeting planners, and visitors to the County. The purpose of the assessment was to inform County branding and marketing strategies by objectively exploring perceptions of the County as a destination for living, working, visiting, and doing business.

This Public Opinion Assessment is the result of the work of an *ad hoc*, cross-agency marketing committee that was created to examine existing marketing and communication efforts in the County, share information across sectors, and breakdown silos to improve marketing and communication efforts. The committee consists of representatives from the Offices of the County Executive, the Department of Economic Development, Montgomery Business Development Corp., Visit Montgomery, the Public Information Office, the Department of Recreation, and Montgomery County Media.

I hope this report will be of value to the County Council. We would be happy to work with the marketing committee to arrange for a presentation if there is interest among the Councilmembers.

IL/aw
Attachment

Public Opinion Assessment

Montgomery County, Maryland



Rockville, Maryland
September 15, 2015

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Executive Summary

The Executive office of the Montgomery County government tasked EurekaFacts with conducting an assessment of the public opinion among County residents, businesses located in Montgomery County, site selectors and commercial real estate brokers, meeting planners and visitors to Montgomery County. In response to this request, a multiple mode study was conducted for Montgomery County, Maryland with data collected between March 1, 2015 and April 24, 2015. A representative sample of 1,185 county residents and a subsample of residents of neighboring jurisdictions responded to a survey administered by mail and online. A set of in-depth interviews of other audiences including business leaders, site selectors, conference planners, and county visitors provided additional qualitative insights on opinions of Montgomery County. This report offers findings for each one of these inquiries.

Resident's Opinions

- Over 70% of residents rate Montgomery County as an “Excellent” or “Very good” place to live.
 - The high rating of Montgomery County was similar across residents groups.
- Residents rated Montgomery County higher on measures of quality of life such as “A place to raise children,” “Safety,” and “Sense of community” than on measures related to economic development such as “Professional opportunities,” “Entrepreneurial opportunities” and “Encouraging business growth.”
 - Almost 40% of residents were unaware of county activities to encourage business growth and those who were, did not rate it highly.
- Key drivers of residents’ overall opinion of the county were:
 - Place to raise children
 - Attractive place for people like me
 - Safety
 - Encourages business growth
 - Variety of recreational services
 - Job opportunities
 - A place that provides professional opportunities
 - Regulates businesses for the well-being of community residents

Measures of quality of life and economic opportunity are dependent on each other. Residents’ perception of the sense of community, entertainment and dining options and arts and cultural scene are important to both the key factors pertinent to quality of life and the perception of economic opportunities.

Among all the key drivers of residents’ rating of Montgomery County as a place to live, the residents’ perception of the County’s encouragement of business growth received the lowest rating.

- Residents’ perception of quality of life and perceptions of economic opportunity in the County are statistically inter-dependent
 - Residents’ perception of the sense of community, entertainment and dining options and the arts and cultural scene are important to both the key factors pertinent to quality of life and the perception of economic opportunities.
 - Similarly, the extent to which residents think the County encourages entrepreneurial opportunities is important to the residents’ perception of the county as a good place to raise children or whether the county is attractive to people like them.

- Residents are very satisfied with County emergency services, law enforcement, and trash collection and recycling. Nearly three quarters of Montgomery County residents rate Trash Pick Up, Recycling, and Emergency services as “Very Good” or “Excellent”. More than half are very satisfied with law enforcement, rating it “Very Good” or “Excellent”. Residents are less satisfied with road maintenance with more than a quarter of the residents rating road maintenance as “Poor” or “Fair.”
- Residents who are planning to move do so mainly because of cost of living. These residents are more likely to be renters, young (millennials) and have income under \$75,000.

Commuting

- Over 50% of county residents live and work in Montgomery County. Slightly over twenty percent of county residents work in Washington DC and relatively few work in Northern Virginia (6.4%) or neighboring Maryland counties (6.7%).
- Except for residents who commute to Washington DC, most (76%) residents drive to work.
- Commute times depend on the destination, but users of public transit report longer commute times than those who drive.
- Despite the overall positive perception of public transportation, few drivers are contemplating switching over to public transportation.

Qualitative findings

Sets of in-depth interviews were conducted with several groups of audiences in order to offer additional insights on the opinions and perceptions of business leaders, business site selection/location consultants, meeting planners and visitors to the county. Because of the nature of these interviews, the findings offer themes and ranges of opinion but findings are not statistically representative of their entire populations.

Business Leaders

- General impressions of Montgomery County as a business location are strong among responding business leaders, with many referring to its talented and experienced workforce, large consumer base, and excellent quality of life.
 - While Montgomery County tends to be an expensive place to do business, this is mitigated by recognition of how costs are driven by the county’s positive traits (especially workforce and housing). Additionally, costs are comparable with other Washington area jurisdictions.
- Montgomery County offers good proximity to customers throughout the country and for being near Washington, DC.
- According to interviewed business owners, the regulatory environment in Montgomery County did not seem not to be a major hurdle. The county was praised for helping small businesses understand it and for being willing to review the environment for its impact on business.
- Interview participants found that Montgomery County has a good business climate, especially for land-use planning and approval. In addition business leaders applauded Montgomery County for continuing to consider how to retain businesses and attract employees.
 - Montgomery County’s programs to support small businesses are highly welcome and praised, though public awareness of these programs appears to be low.
- Business leaders found it difficult to compare the business climate of Montgomery County to other Washington area jurisdictions because each had different strengths and weaknesses.

Also, they found that state related factors were more important therefore making it difficult to compare different counties.

Site Selectors

A set of in-depth interviews with professionals and consultants dedicated to advising firms on their site location were conducted to offer themes on perceptions of those who advise companies on where to locate. These interviews centered on firms located across the country with emphasis on those who specialize in advising firms in the fields of Health IT, bio and cyber security.

- Respondents state that the most important site factors are workforce and quality of life. Montgomery County tends to rate well on both (especially with a highly educated workforce, good housing and public schools). Traffic congestion, high costs for labor and housing arose as concerns.
- According to these site selectors, the most suitable types of organizations for Montgomery County are those in the life sciences, biotechnology and biometrics, defense and other government contractors, and corporate headquarters (multiple industry types).
- Montgomery County compared favorably to Howard and Prince George's Counties on many factors, though Howard County appears to be rapidly catching up.
- Perspectives on sites were often more regionally-based than specific to Montgomery or other counties, especially for key factors such as workforce, proximity to customers and competitors, transportation, housing quality and costs, and the generally high cost of living.
 - Northern Virginia appeared to rate more favorably when compared to Maryland. For interviewed site selectors, this was mostly due to the costs of doing business (business climate) and a highly qualified workforce.

Meeting Planners

- A small group of meeting planners were interviewed in order to better understand the perspectives of professionals who plan business meetings and events. According to them, Montgomery County has a lot to offer. It features a wide variety of experiences to be had, but under-markets itself to meeting planners who are otherwise unaware of what opportunities Montgomery County provides.

Visitors

- A set of intercept interviews, semi-structured interviews and an online survey of visitors to Montgomery County were administered to glean perceptions among visitors to the county. Overall, respondents had a positive experience staying in Montgomery County, MD.
- Online/Digital sources appear to be an important resource in making dining and shopping decisions. Visitors seem to privilege this as a vital source of information even with the availability of hotel staff and literature.
- Interviewed visitors learned of Montgomery County either through business-related travel or through family and friends.

1. Resident Survey

1.1 Methodology

Five thousand households were randomly selected from a list of Montgomery County households. Initially, an advanced postcard was sent to all of the selected households that offered an option to complete the survey online. A paper survey was sent to all potential respondents who did not complete an online survey.

In all, 345 respondents began or completed the survey online. In addition, 440 paper surveys were returned. The total number of respondents from the random sample was 785, representing a 16% response rate. The data were weighted by the demographic characteristics of the Montgomery County-based US Census population characteristics estimates. An additional four hundred (400) Montgomery County residents were recruited from a national online panel. Data from the panel respondents were calibrated to the random sample.

The final sample size for Montgomery County residents was 1,185. This sample size yields a sampling error of +/- 2.85% at a 95% confidence interval. The obtained precision of the estimate is comparable to most national surveys and is better than those achieved for most local area surveys.

Four hundred and twenty-five non-residents were recruited from a national online panel.

1.2 Demographic Snapshot

In comparison to the nation, Montgomery County is growing faster and is more diverse cosmopolitan, educated and affluent. However that affluence comes at a cost: owner costs and rents are higher in Montgomery County than the rest of the nation.

Table 1: Demographic Comparison of Montgomery County & the United States

	Montgomery County, MD	US
Population Estimate	1,016,677	
Population Change (2010 to 2013)	4.6%	2.4%
Persons 65+	13.3%	14.1%
African American	18.6%	13.2%
Asian	14.9%	5.3%
Hispanic Latino	18.3%	17.1%
White (non-Hispanic)	47.0%	63.7%
Other	1.2%	0.7%
Foreign-born	32.2%	12.9%
Bachelor's Degree or Higher	57.1%	28.8%
Median Income	\$98,221	\$53,046
Median Owner Cost Including Mortgage	\$2,535	\$1,540
Median Rent	\$1,568	\$904

Source: United States Census (2013 estimates from <http://quickfacts.census.gov/>)

Table 2: Demographic Comparison of Montgomery County & Neighboring Jurisdictions

	Montgomery County, MD	Arlington County, VA	Fairfax County, VA	Howard County, MD	PG County, MD	Frederick County, MD
Population Estimate (2013)	1,016,677	224,906	1,130,924	304,580	890,081	241,409
Population Change (2010 to 2013)	4.6%	8.3%	4.5%	6.1%	3.1%	3.4%
Persons 65+	13.3%	9.1%	11.1%	11.7%	10.8%	12.5%
African American	18.6%	8.9%	9.9%	18.4%	65.1%	9.1%
Asian	14.9%	9.9%	18.8%	16.2%	4.5%	4.4%
Hispanic Latino	18.3%	15.6%	16.2%	5.8%	14.9%	7.3%
White (non-Hispanic)	47.0%	63.6%	52.7%	56.6%	14.5%	76.5%
Other	1.2%	2.0%	2.4%	3.0%	1.0%	2.7%
Foreign Born	32.2%	23.0%	29.5%	18.2%	20.2%	9.6%
Bachelor's Degree or Higher	57.1%	71.7%	62.7%	60.0%	29.8%	38.2%
Median Income	\$98,221	\$103,208	\$110,292	\$109,865	\$73,623	\$84,570
Median Owner Cost +Mortgage	\$2,535	\$2,724	\$2,569	\$2,553	\$2,175	\$2,082
Median Rent	\$1,568	\$1,733	\$1,687	\$1,489	\$1,241	\$1,243

Source: United States Census (2013 estimates from <http://quickfacts.census.gov/>)

Demographically, Montgomery County is most similar to Fairfax County, Virginia. The smaller Arlington County is more homogeneous in terms of its racial and ethnic makeup. Although the median income in Arlington County is similar to Montgomery County, rent and the cost of owning a house is more expensive. Among its neighbors in Maryland, Montgomery County is more similar to a much smaller Howard County in terms of the demographic profile.

1.3 Where We Come From

Table 3: Origin by Generational Cohort

	Millennials	Generation X and Older	Overall ¹
Montgomery County	23.6%	7.3%	11.8%
Washington Metro	14.4%	15.4%	15.5%
MD (outside of DC Metro)	1.0%	1.5%	1.4%
VA (outside of DC Metro)	2.3%	3.3%	3.0%
State other than VA or MD	38.7%	42.9%	41.4%
Outside of US	20.0%	29.5%	26.9%

¹ Overall numbers presented are based on frequency of valid responses to the question about the origin independent of cohort cross-tabulation.

Most Montgomery County residents come here from outside of Maryland and Virginia (41.4%) or from outside the U.S. (26.9%). Although only 11.8% of Montgomery County residents were born in Montgomery County, millennials were much more likely to be born in Montgomery County than older residents (23.6% vs. 7.3%).

Between both generational cohorts, very few Montgomery County residents come from areas in Maryland or Virginia that are outside the DC metro area.

Table 4: Origin by Length of Residence

	Recent Residents (less than 5 years)	Established Residents (6 years to 15 years)	Longtime Residents (16 years or more)
Montgomery County	2.6%	2.0%	13.7%
Washington Metro	9.4%	5.4%	20.0%
MD (outside of DC Metro)	4.7%	2.4%	2.9%
VA (outside of DC Metro)	1.6%	2.4%	1.0%
Out of State	52.9%	49.8%	39.1%
Outside of US	28.8%	38.0%	23.3%

Most new residents are coming to Montgomery County from outside the DC metro area. Because millennials comprise the largest group of residents born in Montgomery County, data suggest that some of them are staying in the county, hence increasing the number of longtime residents born in Montgomery County.

1.3.1 Where Millennials Come From

Millennial residents of Montgomery County are further differentiated in the following two ways:

- Those who were born or raised in Montgomery County, defined as indicating that they were born in the county or spent most of their life in the county based on years of residence
- Those who come to Montgomery County as adults

In our sample, 55.2% of millennials are local and 44.8% of millennials come from somewhere else.

Table 5: Local vs. Out of County Millennials by Origin

	Montgomery County, MD	In the US, in DC Metro region,	Virginia, other than the DC Metro region	Maryland, outside of the DC Metro region	In the US, Other	Outside of the US
Locals (55.2%)	42.9%	20.8%	1.8%		16.1%	18.5%
Out of County (44.8%)		6.6%		5.1%	66.9%	21.3%

- Most out of county millennials were born in states other than the District of Columbia, Virginia or Maryland (66.9%).
- The percentage of foreign-born millennials is comparable to the percentage of millennials who were either born or raised in Montgomery County.
- Relatively few millennials who moved to the county as adults come from the DC Metro area.

1.4. Why We Are Moving

Table 6: Reasons for Moving

PERCENTAGE OF RESIDENTS INTENDING TO MOVE	22.0%
Reasons for moving: Opportunity vs. dissatisfaction as percentage of residents intending to move	
Life opportunity movers: moving solely for reasons of new job, school/education or retirement	24.1%
Dissatisfied movers: Movers who mentioned any other reason than life opportunities	75.9%
Life opportunity reasons (all residents intending to move)	
Job	27.5%
School/Education	4.7%
Retirement	8.2%
Reasons for dissatisfaction (among dissatisfied movers)	

Quality of life	23.0%
Bigger house	23.4%
Taxes	13.5%
Cost of living	26.8%
Other reasons	13.5%

Overall, 22% of Montgomery County residents indicate that they are planning to move within the next year. About one-quarter of residents who state that they intend to move (24.1%) cited job, education or retirement as reasons for their move and did not report any other reasons. In this study, we refer to this group as life opportunity movers. This means that the primary reason for their move has little to do with their dissatisfaction with living in Montgomery County.

Slightly over three-quarters of the residents who are planning to move (75.9%) cited reasons such as quality of life, taxes and cost of living as the reasons for their move. Thus, there appears to be some dissatisfaction with their current life in Montgomery County as the reason for their intention to move. However, for this group, getting a new job, going away to school or beginning retirement could still be in the mix of the reasons for their move. We will refer to this group as dissatisfied movers.

Table 7: Significant Differences between Life Opportunity & Dissatisfied Movers

	Life Opportunity Movers	Dissatisfied Movers	County Residents Who Do Not Intend to Move
COMMUTE & WORK DESTINATION			
Commute: 46 minutes to 1 hour	10.6%	18.2%	15.1%
Locations other than Montgomery County, DC or suburban MD	8.6%	15.2%	8.0%
DEMOGRAPHIC PROFILE			
New Residents (<5)	20.8%	28.2%	16.3%
Established (6 to 14)	15.1%	25.4%	19.0%
Long time (15+)	64.2%	46.4%	64.7%
GENERATIONAL COHORT			
Millennials	43.0%	48.0%	20.3%
Gen X and Older	57.0%	52.0%	79.7%
RACE/ETHNICITY			

	Life Opportunity Movers	Dissatisfied Movers	County Residents Who Do Not Intend to Move
Hispanic Origin	3.9%	15.8%	12.8%
INCOME			
Income <75,000	32.1%	39.4%	30.6%
Income >200,000	16.7%	11.2%	15.4%
LIVING SITUATION			
Renters	44.4%	51.4%	17.5%
Children in the household	28.6%	23.3%	32.1%

In comparison to residents who do not plan to move, all movers, regardless of the stated reasons, tend to be renters. They are also much more likely to be millennials. Most residents who intend to move lived in the county for less time than residents who do not plan to move.

Besides the characteristics that differentiate all movers with the County residents who do not plan to move, life opportunity movers are very similar to residents who do plan to move. One exception is that the life opportunity movers are less likely to be Hispanic. Furthermore, life opportunity movers tend to have shorter commutes than residents who do not plan to move.

In comparison to the residents who do not plan to move, dissatisfied movers are:

- More likely to work outside of the DC metro area and have longer commutes
- More likely to have incomes under \$75,000 and less likely to have incomes over \$200,000
- Less likely to have children in the household

Dissatisfied movers are also more likely than life opportunity movers to be:

- Millennials
- Of Hispanic origin

Table 8: Millennial Movers

	Life Opportunity Movers	Dissatisfied Movers	County Residents Who Do Not Intend to Move
Locals	9.5%	30.4%	60.1%
Out-of-County	8.8%	36.0%	55.1%
Overall	9.2%	32.9%	57.9%

Overall, 42% of millennials state they are planning to move within the next year. Among these, 9.2% state job or education as a reason. Nearly a third (32.9%) could be classified as dissatisfied movers. Millennials who moved to Montgomery County from elsewhere were more likely to be dissatisfied movers than those who were born or raised in Montgomery County.

Regardless of whether they are dissatisfied or life opportunity movers, overall almost 30% (29.3%) of millennials who plan to move mention a job as one of the reasons for moving. Out-of-county millennials who plan to move mention a job as a reason than those born or raised in the county (35.7% vs. 23.3%). Other reasons for moving are presented in the table 9 below.

Table 9: Reasons for Moving Other than Job or Education among Millennials

<i>Reasons for Dissatisfaction (among Dissatisfied Movers)</i>				
	Local Millennials	Out-of-County Millennials	All Millennials	All Movers
Quality of Life	6.7%	11.9%	9.2%	23.0%
Bigger House	8.9%	29.8%	19.0%	23.4%
Taxes	6.7%	8.3%	7.5%	13.5%
Cost of Living	24.2%	19.0%	21.7%	26.8%
Other Reasons	27.8%	17.9%	23.0%	13.5%

Table 9 indicates the following:

- In comparison to all residents who plan to move, millennial movers are much less likely to mention taxes or quality of life as the reason for their move.
- Overall, cost of living is an often-mentioned reason for moving. But millennials are more likely to state some other reason.
- Millennials not born and raised in Montgomery County cite a bigger house as one of the reasons to move more so than millennials who were born or raised in the county.

1.4.1 Key Attitudinal Drivers of Intent to Move

To determine key attitudinal drivers, univariate analyses were first conducted to compare residents who intend to move and those who do not. The comparison was between dissatisfied movers and residents who do not plan to move. Life opportunity movers were excluded because their attitudinal profile was very similar to non-movers.

Analysis identified three significant factors influencing intent to move among several considered¹ (see Table 10). It is important to note that the question rating of Montgomery County in terms of available entrepreneurial opportunities was highly related to a question about professional opportunities. Therefore, the two questions had a similar effect on the intent to move.

Results of the analyses suggest that perceived cost of living and perceived economic opportunity are key drivers of residents wanting to move out of Montgomery County. There is

¹ Logistic regression was used. The criterion variable was intent to move. The predictor variables were top box scores for attitudinal measures.

also a social dimension: Residents who intend to move also feel that they are not meeting people with similar experiences and interests.

The pattern of results for millennials is very similar in terms of cost of living and professional and entrepreneurial opportunities. However, perception of the opportunity to meet people like them was not a factor among millennials.

Table 10: Key Drivers of Intent to Move

Key Driver	Odds Ratio	Interpretation
Cost of Living	3.3	Residents who rated the cost of living as high or very high were 3 times more likely to say that they plan to move.
Montgomery County Offers Professional/Entrepreneurial Opportunities	.58	Residents who did not agree or strongly agree that Montgomery County offers professional or entrepreneurial opportunities were 1.7 times more likely to plan to move.
Opportunity to Meet People Like Me	.63	Residents who did not agree or strongly agree that Montgomery County offers opportunities to meet people like them were 1.6 times more likely to plan to move.

1.4.2 Conclusions:

- Montgomery County residents are leaving the county primarily for economic reasons:
 - Cost of living and lack of professional and entrepreneurial opportunities are main drivers among the residents who are planning to leave for reasons other than job, education or retirement.
 - Individuals with lower incomes are more likely to intend to leave than those with higher incomes.
 - Residents who are leaving are more likely to be renters and are more likely to be millennials.

1.5 Where We Work & How We Get There

Table 11: Work Location by Generational Cohort

	Millennials	Generation X & Older	Overall ³
Montgomery County	58.6%	54.9%	56.0%
Northern Virginia ¹	3.4%	7.6%	6.4%
Washington DC	15.2%	24.0%	21.4%
Neighboring Counties in MD ²	6.8%	6.6%	6.7%
Other	16.0%	6.8%	9.6%

¹ Includes Fairfax County/Falls Church, Arlington County, and Loudon Counties in VA and Alexandria

² Includes Frederick, Howard and Prince George's Counties in MD

³ Includes respondents who reported being employed

More than half of Montgomery County residents live and work in the county (56%). Slightly over one-fifth (21.4%) of Montgomery County residents commute to Washington DC. Relatively few work in Northern Virginia or neighboring Maryland counties. Millennials are less likely to work in Washington DC than older residents and more likely to report working in locations outside of the Washington DC area.

Table 12: Work Location by Length of Residence

	Recent Residents (less than 5 years)	Established Residents (6 years to 15 years)	Longtime Residents (16 years or more)
Montgomery County	55.4%	54.8%	55.7%
Northern Virginia ¹	4.2%	2.2%	8.8%
Washington DC	21.7%	29.0%	18.9%
Neighboring Counties in MD ²	13.9%	2.2%	6.6%
Other	4.8%	11.8%	10.1%

¹ Includes Fairfax County/Falls Church, Arlington County, and Loudon Counties in VA and Alexandria

² Includes Frederick, Howard and Prince George's Counties in MD

Recent residents are more likely to work in neighboring Maryland counties than established and long-term residents. Those who lived in Montgomery County between 6 and 15 years are more likely to work in Washington DC.

Table 13: Work Location by Income

	Under \$50,000	\$50,000 – \$74,999	\$75,000 – \$99,999	\$100,000 – \$150,000	\$150,000 – \$200,000	\$200,000 – \$250,000	Over \$250,000
Montgomery County	16.3%	19.9%	14.0%	23.8%	10.9%	7.1%	7.9%
Northern Virginia	9.8%	2.0%	19.6%	15.7%	21.6%	19.6%	11.8%
Washington DC	6.5%	12.9%	21.8%	22.4%	17.6%	9.4%	9.4%
Suburban MD	24.6%	12.3%	15.8%	14.0%	15.8%	8.8%	8.8%
Other	2.4%	28.0%	13.4%	9.8%	39.0%	2.4%	4.9%
Overall (Among Employed)	13.1%	17.7%	16.0%	21.0%	16.0%	8.0%	8.2%

Table 13 demonstrates the following:

- Residents who report working in suburban Maryland counties (i.e., other than Montgomery County) and residents working in Montgomery County were more likely to have incomes under \$50,000 than residents working in other jurisdictions.
- Residents working in Washington DC also tended to report higher incomes than those working in Montgomery County.
- Residents working in Northern Virginia reported the highest income levels.

However, these data do not necessarily indicate that jobs in Montgomery County are necessarily low paying. Rather, individuals who have lower-paying jobs are more likely to live closer to them.

1.5.1 How We Get There

Table 14: Transportation Modality by Destination

	Montgomery County	Washington DC	Northern Virginia	Neighboring Counties in MD	Other	Overall ¹
Drive Only	81.0%	50.0%	90.6%	91.4%	96.0%	76.0%
Walk or Bike	7.0%			1.7%	1.3%	5.2%
Public Transit¹	12.0%	50.0%	9.4%	6.9%	2.7%	18.7%

¹Includes those who also reported driving, walking or biking to public transit

²Includes respondents who are employed

- Most Montgomery County residents (76%) drive to work and slightly less than one-fifth (18.7%) take public transportation.

- One-half of the respondents (50%) who commute to Washington DC use public transit, whereas only 18.7% of commuters within Montgomery County rely on public transportation.
- Commuters who work outside of Montgomery County and Washington DC almost exclusively drive.

1.5.2 Profile of Public Transportation Commuters

The following three tables provide a profile of residents in relation to their mode of transportation along several different variables.

Table 15: Mode of Commuting by Generational Cohort

	Millennials	Generation X & Older
Drive Only	75.4%	76.5%
Walk or Bike	7.0%	4.5%
Public Transit	17.6%	19.0%

Table 16: Mode of Transportation by Ownership Status

	Rent	Own
Drive Only	60.3%	78.7%
Bike or Walk	4.4%	5.3%
Public Transit	35.2%	16.1%

Table 17: Mode of Transportation by Income

	Under \$50,000	\$50,000 – \$74,999	\$75,000 – \$99,999	\$100,000 – \$150,000	\$150,000 – \$200,000	\$200,000 – \$250,000	Over \$250,000
Drive only	61.3%	78.2%	70.9%	68.6%	72.0%	84.6%	77.2%
Bike or walk	11.0%	4.9%	4.4%	7.0%	3.8%	3.3%	8.7%
Public Transit	27.7%	17.0%	24.8%	24.4%	24.2%	12.1%	14.1%

These results indicate the following:

- Renters are more likely to use public transportation in comparison to those who own their residence (35.2% vs. 16.1%).

- Otherwise, there are no notable differences between generational cohorts or income levels except that residents with incomes over \$200,000 are less likely to take public transportation.

1.5.3 How Long It Takes Us

Table 18: Commute Time by Destination

	Montgomery County	Washington DC	Northern Virginia	Neighboring Counties in MD	Other	Overall
Less than 15 Minutes	31.0%	23.5%	3.0%	24.0%	20.8%	21.9%
16-30 Minutes	41.5%	24.7%	26.9%	40.4%	26.7%	34.3%
31-45 Minutes	14.7%	21.0%	23.9%	17.3%	20.8%	18.5%
46 Minutes to 1 Hour	11.4%	16.0%	28.4%	11.5%	12.9%	16.2%
Over 1 Hour	1.4%	14.8%	17.9%	6.7%	18.8%	9.2%

Table 19: Commute Time by Transportation Modality

	Drive Only	Walk or Bike	Public Transportation
Less than 15 Minutes	23.9%	73.0%	12.4%
16 - 30 Minutes	36.3%	25.7%	24.7%
31 - 45 Minutes	18.6%		22.5%
46 Minutes to 1 Hour	14.9%		22.2%
Over 1 Hour	6.4%	1.4%	18.2%

Table 20: Commute Time by Transportation Modality: Commuters in Montgomery County

	Drive Only	Walk or Bike	Public Transportation
Less than 15 Minutes	29.6%	73.5%	19.0%
16 - 30 Minutes	44.3%	26.5%	30.2%
31 - 45 Minutes	14.8%		20.6%
46 Minutes to 1 Hour	11.1%		20.6%
Over 1 Hour	.2%		9.5%

Residents who work and live in Montgomery County have the shortest commutes. A majority of residents (72.5%) report a commute time of less than 30 minutes. Longest commutes are to Northern Virginia. It is also important to note that commuters to Washington DC report relatively

long commute times. This is likely because many of the commuters to Washington DC use public transportation.

As shown in Table 19, commuters using public transportation generally show longer commute times than those who drive. For example, whereas 21.5% of drivers report commutes longer than 45 minutes, almost twice as many public transportation users (40.4%) report commute times of 45 minutes or more. This pattern holds for inter-county commuters (Table 20). Whereas only 11.3% of drivers who commute within Montgomery County have commutes longer than 45 minutes, 30.1% of users of public transportation within the county have commutes longer than 45 minutes. Furthermore, 9.5% of inter-county commuters who use public transportation report commute times of 1 hour or more.

1.5.4 What Do We Think About Public Transportation?

Table 21: Perception of Public Transportation by Generational Cohort among Commuters

	Millennials	Generation X & Older	Overall	Overall Bottom & Top box
Poor	3.6%	4.8%	4.5%	11.5%
Fair	6.9%	7.0%	7.0%	
Good	30.8%	25.6%	26.9%	26.9%
Very Good	33.8%	32.9%	33.2%	52.3%
Excellent	16.3%	20.1%	19.1%	
Don't Know	8.5%	9.6%	9.3%	

Montgomery County residents have a generally positive opinion of the public transportation system, with over half (52.3%) rating the public transportation system as “Very Good” or “Excellent”. Only 11.5% of the residents rate it as “Poor” or “Fair”. There were no notable differences by generational cohort.

To compare the opinions of the residents who use public transportation with those who do not, the inter-county and commuters to Washington DC were selected for analysis. Due to a small number of individuals who bike or walk, they were excluded from the analysis.

Commuters to other jurisdictions were also excluded because:

- They may use local transportation agencies (e.g. Fairfax Connector or TheBus in Prince George’s County).
- Their ratings may be influenced by the service of those local companies.

Therefore, their ratings may not accurately reflect their perception of service provided in Montgomery County by WMATA and RideOn.

Table 22: Perception of Public Transportation by Commuting Destination & Mode of Commuting

Destination	Montgomery County		DC		DC and Montgomery County Combined	
	Drive only	Public Transportation	Drive only	Public Transportation	Drive only	Public Transportation
Poor	4.0%	6.1%	4.2%	4.2%	4.5%	4.6%
Fair	9.0%	3.0%	7.4%	3.4%	7.9%	5.7%
Good	27.6%	27.3%	32.6%	24.6%	28.2%	25.5%
Very Good	35.1%	15.2%	24.2%	44.1%	34.5%	32.3%
Excellent	15.9%	47.0%	17.9%	16.9%	15.4%	24.4%
Don't Know	8.5%	1.5%	13.7%	6.8%	9.6%	7.5%

Findings show that the rating of the public transportation system is slightly higher among those who use it for daily commuting than those who drive to either Washington, D.C. or within Montgomery County. Furthermore, residents who rely on public transportation to commute within Montgomery County are more likely to rate it "Excellent" than those who commute to Washington D.C. who were more likely to rate public transportation as "Very Good."

1.5.5 How We Would Like To Get There

Table 23: Mode of Commuting by Preferred Mode

Current mode of commuting	Preferred mode of commuting			
	Drive	Walk	Bike	Public Transit
Drive Only	74.0%	9.6%	4.1%	12.3%
Walk or Bike	20.8%	58.4%	11.7%	9.1%
Public Transit	18.4%	13.0%	6.5%	62.1%
Overall Transit Preference	58.0%	13.5%	5.2%	23.4%
Current Use overall	76.0%	5.2%		18.7%

Overall, Montgomery County residents prefer their current mode of commute. However, data show some promising results for public transportation. The 12.3% of drivers who would prefer to use public transportation represent 9% of all commuters. On the other hand, the 18.4% of current users of public transportation who would prefer to drive represent only 4% of all commuters. Thus, data suggest a potential 5% gain in the use of public transportation if both

groups switch to their preferred modality and potential 9% gain if current users of public transportation do not change.

Findings do suggest that many Montgomery County residents would prefer to walk or bike to work than presently do (18.7% vs. 5.2%), with more residents stating a preference for walking (13.5%) than biking (5.2%).

Table 24: Preferred Mode of Commuting by Generational Cohort

	Millennials	Generation X & Older
Drive	59.1%	57.5%
Walk	12.4%	14.0%
Bike	5.1%	5.1%
Public Transit	23.4%	23.4%

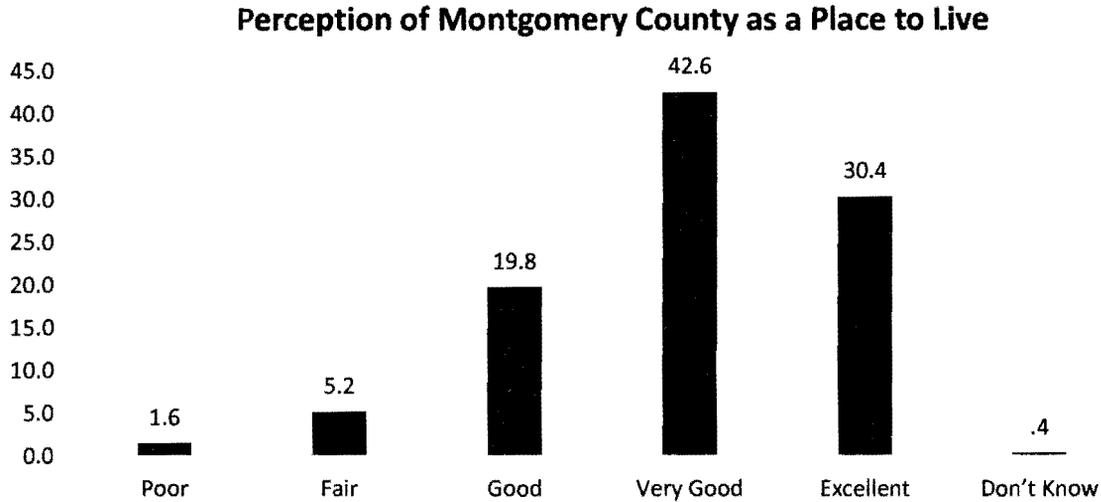
There was also no significant difference amongst generational cohorts in terms of preference for mode of transportation. Walkable communities may be important to millennials but perhaps only in relation to being able to walk in places where they live, not necessarily in relationship to their commute to work.

1.5.6 Conclusions

- Montgomery County cannot be considered a “bedroom” community to Washington, D.C.
- Washington D.C. is the second-most frequent destination for commuters.
- Relatively few Montgomery Country residents work in other DC Metro areas.
- The pattern of commuting to work is probably influenced by the design of the Metro system to bring the workforce into Washington D.C. The survey shows that use of public transportation is most common among commuters traveling to Washington D.C. On the other hand, most inter-county commuters drive.
- In general, county residents have a positive perception of the public transportation system. Some drivers would be willing use public transportation.
- Longer commute times among public transportation users may indicate why some inter-county commuters using public transportation may prefer driving and why drivers may be less likely to switch to public transportation.
- Users of public transportation tend to be renters, which suggests that access to public transportation may be easier in higher density neighborhoods.
- The present survey does not provide further data to understand commuting preferences such as convenience, destinations within the county, ease of access to public transportation and cost factors that could be potential barriers to using public transportation. This should be addressed by county transportation planners.

1.6 What We Think About Living in Montgomery County

Figure 1



The majority of Montgomery County residents love where they live: 73% of Montgomery County residents rate the county as either a “Very Good” or “Excellent” place to live. Only 6.8% rate Montgomery County as “Poor” or “Fair.” There were no significant differences by demographic characteristics, length of residence in the county, transportation mode, commuting time or even the intent to move.

Table 25: Top Box Scores on Opinion Measures

	Top Box Score
TOP TEN: MOST FAVORABLE OPINIONS	
Availability of quality medical services	81.2%
Montgomery County, MD is an attractive place for people like me	80.1%
Place to raise children	75.4%
Local dining options	72.9%
Racial and ethnic diversity	72.6%
Local retail shopping	72.5%
Safety	71.6%
Opportunities for outdoor activities	70.4%
Montgomery County, MD is an exciting place to live	70.4%
Montgomery County, MD has a competitive business environment	70.0%

	Top Box Score
MIDDLE	
Access to parks and green spaces	69.2%
Montgomery County, MD is a progressive community	68.3%
Variety of recreational services	67.4%
Montgomery County, MD is a place that welcomes innovative people	65.4%
Cost of living	64.9%
In Montgomery County, MD, there are places to meet people like me	64.7%
Montgomery County, MD has a sense of community	63.2%
Montgomery County, MD is a place that welcomes diversity	60.3%
BOTTOM TEN: LEAST FAVORABLE OPINIONS	
Entertainment options	56.6%
Public Transportation	53.5%
Montgomery County, MD is a place that provides professional opportunities	52.5%
Job Opportunities	52.4%
Overall, I feel my tax dollars are well spent in Montgomery County, MD	52.3%
Montgomery County, MD is a place that provides entrepreneurial opportunities	51.8%
Arts and culture scene	50.9%
Montgomery County, MD regulates businesses in order to benefit the well-being of community residents	39.0%
Encourages business growth	24.3%
Traffic congestion	8.8%

- Even among the measures that received lower ratings, more than half of residents still rate Montgomery County highly.
- Quality of life measures are typically rate highly. Residents think that Montgomery County is a great place to raise children, feel that it is a safe place to live and like the shopping and dining options. Most (70.4%) think that Montgomery County is an exciting place to live.
- Although most (70.0%) residents think that Montgomery County offers a competitive business environment, only one-quarter of residents believe that the county is doing well in encouraging business growth.
 - Almost 40% of Montgomery County residents indicate that they did not know how well Montgomery County does in encouraging business growth.
 - Other measures pertinent to economic development, such as availability of professional opportunities, jobs and entrepreneurial opportunities, also receive lower ratings in comparison to the quality of life measures.

1.6.1 Key Drivers of Residents' Overall Opinion of Montgomery County as a Place to Live

Analyses² of the attitudinal measure of the relationship to the overall rating of Montgomery County as a place to live revealed the following measures as key drivers (listed in the order of importance):

1. Place to raise children,
2. Attractive place for people like me,
3. Safety,
4. Encourages business growth,
5. Variety of recreational services,
6. Job opportunities,
7. A place that provides professional opportunities, and
8. Regulates businesses for the well-being of community residents.

By plotting the relative importance of each driver (indicated by the standardized percent of variance attributed to the factor based on LGM analyses) and the average score, we can look at these data in terms of a penalty/reward analysis. The penalty/reward analysis is a tool for prioritization. We should note that all drivers have a significant impact on residents' perception of Montgomery County as a place to live. However, the penalty/reward analyses compare these factors in terms of their possible impact if they are to improve or if the attitudes become less favorable. The penalty/reward graph presented below contains the following four quadrants:

- **High Importance/Lower Score**
These attitudes and opinions have a strong impact on the overall perception of Montgomery County as a place to live but have lower scores than other measures. These are high priority attitudes and opinions for intervention. Increases in these measures will have a substantial positive impact on the overall assessment.
- **High Importance/High Scores**
These attitudes and opinions have a strong impact on the overall perception of Montgomery County as a place to live and most respondents rate them positively. These are high priority areas to maintain: a decrease in these measures will lead to a decrease of the overall assessment.
- **Lower Importance/Lower Score**
These attitudes have lower scores but also a lower impact on the overall perception of Montgomery County. Hence, they should be a lower priority for intervention than High Importance/Lower Score attitudes and opinions.
- **Lower Importance/High Score**
These attitudes and opinions have a lower impact on the overall assessment, but residents think that the county is doing well. Decreases on these measures would negatively impact the overall assessment but not to the same degree as High importance/High Scores measures.

² To identify key drivers, a two-step process was used. First, sets of variables pertinent to each topic of the survey (e.g., economic indicators, quality of life measures, opinions about entertainment and recreational options) were regressed on the measure of Montgomery County as a place to live using separate stepwise regression analyses. The significant predictors from regression analyses were then regressed on the overall measure of Montgomery County as a place to live. Relative importance of each key predictor was used using LMG analysis. LMG analysis yields the percentage of explained variance accounted by each of the predictors in the regression model.

As shown in Figure 2, residents' positive perception of the county depends on maintaining the positive perception of the county as:

- A good place to raise children,
- Being attractive to type of people residents consider themselves to be,
- Being safe,
- Offering a variety of recreational services, and
- Offering job opportunities.

On the other hand, residents' perception of the County's efforts in encouraging business growth clearly falls into the Important/Lower Score quadrant. Improvement of the residents' perception on this factor would increase the overall perception of the County as a good place to live.

Figure 2: Penalty Reward Analysis



1.6.2 Secondary Drivers of Residents' Opinion of Montgomery County

Once key drivers were identified, analyses further looked at attitudes and opinions influenced by these key factors in residents' perception of Montgomery County as a place to live. Theoretically, targeting these secondary factors may improve the opinions on the key drivers and hence improve the overall perception of Montgomery County. Secondary drivers were derived by looking at the convergent results of several statistical procedures including Regression models that used key drivers as criterion variables, Structural Equation Modeling and Bayesian Neural Network Models.

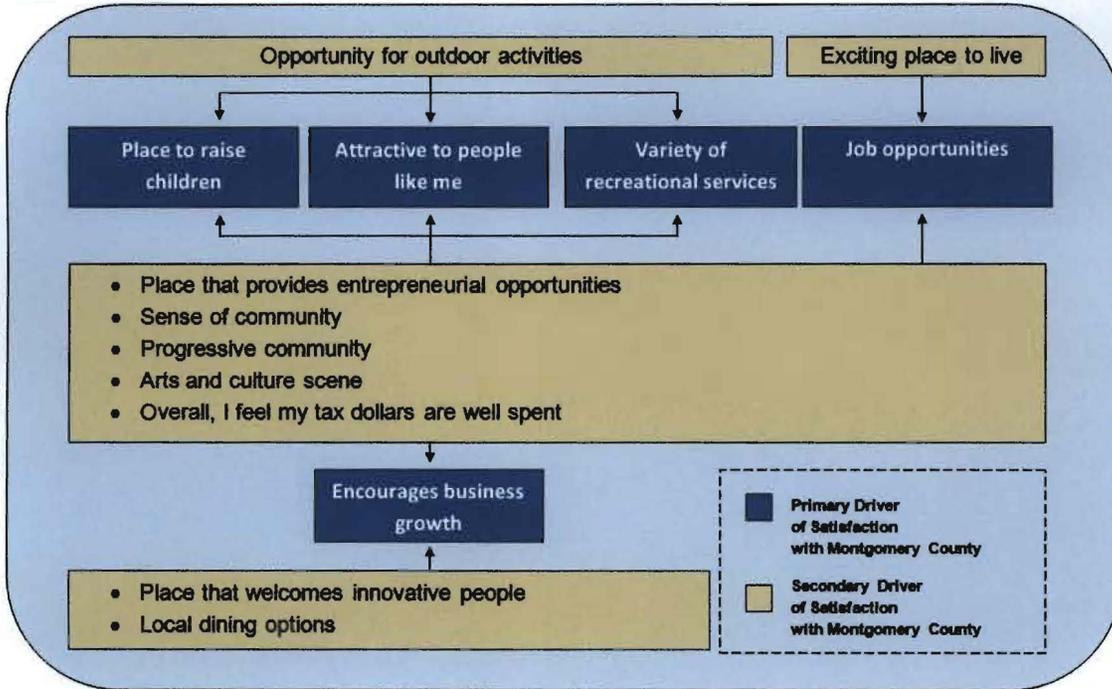
The analyses identified the following set of secondary drivers that were related to most key drivers shown in Figure 3 below:

- Montgomery County provides entrepreneurial opportunities,
- Sense of community,
- Montgomery County is a progressive community,

- Perception of arts and culture in Montgomery County, and
- Belief that tax dollars are well spent.

In addition, the perception of opportunities for outdoor activities was positively related to the ratings of the county as a good place to raise children, being attractive to people like me and the variety of recreational services.

Figure 3: Secondary Drivers of the Overall Rating of Montgomery County as a Place to Live



It is also notable that the perception of Montgomery County as an exciting place to live was positively related to the perception of the extent to which the county provides job opportunities. Whereas one would expect that the belief that the county welcomes innovative people would have an impact on the perception of the county encouraging business growth, the rating of local dining options also had a positive relationship with the same key factor.

1.6.3 Demographic Comparisons: Millennials

Millennials are much more optimistic on the Montgomery County economy than their older peers. On two key drivers that correspond to economic activity, professional opportunities and business growth, millennials rate Montgomery County significantly higher. Millennials are also more likely to think that their tax dollars are well spent and that Montgomery County has a competitive business environment.

Table 26: Significant Comparisons between Millennials & Older Cohorts (average rating)

	Millennials	Generation X & Older
Overall, I feel my tax dollars are well spent in Montgomery County, MD	3.55	3.32
Montgomery County, MD is a place that provides professional opportunities	3.57	3.40
Montgomery County, MD has a competitive business environment	4.02	3.79
Montgomery County, MD: Encourages business growth*	3.42	3.15

* Indicates key driver of overall opinion.

1.6.4 Conclusions

- Residents like living in Montgomery County. They generally rate Montgomery County highly in terms of quality of life measures but lower in terms of some of the economic dimensions. This lower ranking is most notable in the extent to which the county encourages business growth, which was a key driver of perceptions of Montgomery County.
- Vitality of the community is important. It has the potential to maintain key quality of life measures and improve residents' perceptions of economic factors as well. For example, the sense of community, the arts and culture scene and local dining options may not only make a county more attractive as a place to live, but also indicate economic well-being. It is known that "access to excesses" suggests economic prosperity.
- Perception of entrepreneurial opportunities is another factor in the perception of quality of life and economic health. For example, economic opportunities influence residents' perception of whether the county is a good place to raise children, as well as whether the county encourages business growth. The two are interrelated. Parents want their children to grow up in a place where the economy is growing.
- Whereas Millennials are more bullish on the economic drivers, they do not differ from their older peers on the quality of life measures. There is a potential opening to further improve Millennials' assessment of quality of life measures.

1.7 County Services

Table 27: Perception of County Services

	Trash Pick-Up	Recycling	Road Maintenance	Snow Removal	Law Enforcement	Emergency Services
Bottom 2 (Fair and Poor)	5.8%	5.3%	26.8%	15.3%	8.7%	4.3%
Middle (Good)	20.0%	19.1%	41.1%	30.3%	23.0%	22.7%
Top 2 (Very Good and Excellent)	74.2%	75.5%	32.1%	54.5%	68.4%	73.0%

Approximately three quarters of Montgomery County residents consistently rate Trash Pick Up (74.2%), Recycling (75.5%) and Emergency (73%) services as “Very Good” or “Excellent”. Overall, County residents also hold the local law enforcement in high regard, with 68.4% rating law enforcement as “Excellent” or “Very Good”.

Snow removal received a lower overall rating. However, the majority (54.5%) of residents rated county snow removal as “Very Good” or “Excellent”, whereas only 15.3% considered it to be “Poor”.

The pain point appears to be residents’ perception of road maintenance. Only about a third of the residents consider road maintenance to be “Very Good” or “Excellent”, and more than a quarter of Montgomery County residents (26.8%) give it a “Poor” or “Fair” rating.

When we considered the effect that the ratings of county services had on the overall ratings of Montgomery County as a place to live (excluding all the other attitude measures), ratings of law enforcement and road maintenance were the only significant predictors. Similarly, ratings of law enforcement and road maintenance were the only significant predictors of the residents’ perception of whether their taxes are spent well.

1.8 Perception of Montgomery County by Non-Residents

The values presented in Table 28 summarizes non-residents’ opinions of Montgomery County. The column “Top Box Scores” represents the proportion of all respondents who rate the County as “Very good” or “Excellent.” The denominator included respondents who replied “Do not know.” Therefore, what this number represents is a raw assessment of the County: the percentage of non-residents who express a positive opinion of the County. For example, 50% of individuals in the Washington, D.C. metro region think that Montgomery County has very good or excellent access to medical services. However, 39% of individuals do not know about the quality of medical services. The last column of the table represents the top box scores among respondents who gave a rating. In other words, those who responded “Do not know” were excluded from the calculation. These values represent the opinions of the non-residents who are assumed to be familiar with the County.

Table 28: Perception of Montgomery County by non-residents

	Top Box Scores	Do Not Know	Top Box among Respondents Who Gave a Rating
Job Opportunities	45%	35%	64%
Cost of Living	66%	19%	82%
Dining Options	52%	34%	79%
Place to Raise Children	50%	30%	72%
Safety	49%	23%	63%
Outdoor Activities	47%	33%	70%
Retail	57%	28%	79%
Ethnic Diversity	50%	27%	69%
Medical Services	50%	39%	82%
Public Transportation	38%	34%	57%
Variety of Recreational Services	44%	33%	66%
Entertainment Options	44%	33%	66%
Art and Culture Scene	31%	39%	51%
Traffic Congestion	9%	24%	11%
Access to Parks and Green Spaces	40%	36%	62%
Encourages Business Growth	30%	49%	58%
Sustainability	30%	49%	58%

- Many non-residents are not familiar with the characteristics of Montgomery County which were asked in the survey.
- Even with many non-residents not being familiar with Montgomery County, at least half of non-residents rate Montgomery County highly on most of the quality of life measures like retail options, dining options, and medical services. Non-residents also rate Montgomery County highly as a place to raise their children.

- Those familiar with the county, generally give the county high ratings. Besides traffic congestion, the lowest rating is for the Art and Culture Scene.

2. Qualitative Interviews

2.1 Qualitative Methodology

EurekaFacts followed a mixed method/mode approach in conducting research for this project. In addition to the quantitative survey used to collect data on residents' and non-residents' perceptions and attitudes regarding Montgomery County, EurekaFacts also conducted a phase of qualitative research with four important stakeholders or audiences:

1. Business leaders
2. Site selectors
3. Brokers and meeting planners
4. Visitors

Incorporating a qualitative component was essential as a way to directly identify, explore and investigate the perceptions and preferences in the target groups identified by the county. It also ascertained the nature and priority of factors that drive key decision-making as it relates to:

1. Where business and leisure travelers decide to visit.
2. Where an organization decides to conduct a meeting.
3. Where and why a business chooses (or does not choose) to locate their business in Montgomery County, MD.

With the exception of the business leader audience, qualitative research was conducted via short semi-structured interviews. Semi-structured interviews can be defined as partially controlled discussions between the interviewer and an individual that are meant to gather information on a specific set of topics. They consist of a set of pre-determined open-ended questions that follow in a particular order. While the interview protocol does provide a guide for the conversation between the interview participant and interviewer as well as a roadmap for staying focused on relevant topics, incorporating open-ended questions does allow some space for the research participant to "stray" or "detour" from the topic at hand. These types of "diversions" can be important as they may provide new ways of seeing or understanding a topic.

Semi-structured interviews were selected as a research tool because, in most cases, EurekaFacts interviewers would have one opportunity to engage with leaders in their respective fields. Having a focused, guided discussion was the most practical approach to capturing relevant information for this project.

Interviews with business leaders differed slightly in that the protocols contained a quantitative component. During the interviews, business leaders were asked to respond to a set of relevant closed-ended questions. These questions were followed by an open-ended request for rationale for responses. This semi-structured approach to qualitative inquiry allowed us to capture and measure responses to scaled/close-ended questions, while at the same time allowing businesses of differing size, sector, or industry to expound on their own particular logic and rationale for answering the closed-ended questions the way they did.

For this project, interviews were conducted over the phone. Since audiences were varied, interview topics also varied but ranged from discussions on topics such as the advantages/disadvantages to hosting a meeting in Montgomery County, MD to the impact of taxes and fees on doing business in Montgomery County, MD. (See Appendix F for qualitative protocols for each audience).

Names and contact information for research participants were received from various members of the project committee and came from across the U.S. Outreach to participants took the form of letters, emails and phone calls. A total of 33 semi-structured interviews were completed with business leaders, site selectors, visitors, and meeting planners for this project.

The following sections each begin by providing details on the interview participant group and a brief overview of the topics covered in the interviews. These introductory sections are followed by research participants responses to the questions posed in the interviews (to see complete interview questions, see Appendices C – F). In some instances, excerpts or statements from the interviews are included as a way to affirm sentiments, perspectives and opinions that emerged in the interviews.

2.2 Business Leader Interviews

Interviews were designed to be conducted with businesses that operate within Montgomery County, MD and those outside of county and state borders. Conversations focused on research participants’ decision-making process in choosing to locate within Montgomery County and possible future considerations for where they may expand or relocate a business. Interviews focused on key factors or issues business leaders considered when making decisions regarding the location of their business. Interviews sought to explore business leaders’ experience in general but also, more specifically, how their experiences related to Montgomery County, MD as a business location. Twelve interviews were completed.

The following chart shows the types of organizations, the number of employees (overall and in Montgomery County) and number of years the business has been in operation.

Table 29: Summary of Business Leader Interviews

Respondent	Business Type	# Employees	# of Employees in Montgomery County	# Years Operating
A	Health Research	100 - 500	100-500	31-40
B	Food	11- 50	11-50	1-10
C	Health Care	> 5,001	<5,000	50+
D	Enterprise Security Products	6-10	6-10	1-10
E	Medical Equipment (non-profit)	51-100	51-100	31-40
F	Management Consulting	11-50	11-50	21-30
G	Real Estate and Technology	Varies based on need	>>>	31-40
H	Food service	11-50	11-50	1-10
I	Restaurant	11-50	11-50	21-30

J	Insurance Sales	500-1,000	101-1,000	50+
K	Federal and state government contracting for training evaluation	6-10	6-10	21-30
L	Computer Repair	<5	<5	1-10

2.2.1 Summary of Findings

The findings below are based on interview participant responses. They summarize the more detailed interview responses to specific topics and questions that follow:

- Mostly, business leaders' impressions of Montgomery County as a business location were strong, especially for its talented and experienced workforce, large consumer base and excellent quality of life. However, it is possible that their impressions were high in specific industries (e.g., biotechnology and health care) and lower in others (e.g., real estate, manufacturing).
- Interviewed business leaders reported that Montgomery County mostly had good availability of business office space, including many high-quality buildings with important amenities and varied price points, but concern existed over high costs and limited or no space for manufacturing.
- While Montgomery County tends to be an expensive place to do business, business leaders found that it is mitigated by recognition of how costs are driven by the county's positive traits (especially workforce and housing). Furthermore, they offered that costs were comparable with other Washington area jurisdictions.
- Business leaders stated that leasing costs in Montgomery County varied, including being high but the high costs were often mitigated by the variety of choices and special programs (e.g., incubators and other shared space).
- Interview participants reported that Montgomery County had fast and reliable communication infrastructure that was widely available. However, they also noted that Virginia has many more backup facilities (data centers, etc.).
- According to the interviewed business leaders, quality of life is excellent in Montgomery County, especially housing, schools (K-12 and higher education), entertainment, public services, restaurants and shopping and recreation. Proximity to Washington, DC (arts, entertainment, etc.) also enhances quality of life. However, living and working in Montgomery County is expensive, and private and public transportation are both good (plentiful) and bad (congested and expensive).
- Montgomery County offers good proximity to customers throughout the county and for being near Washington, DC, but proximity is not an issue for businesses that rely on electronic communications to work with customers in multiple regions.
- Mostly, Montgomery County has a good business climate, especially for land-use planning and approval, and for continuing to consider how to retain businesses and attract employees.
- Business leaders found it difficult to compare the business climate of Montgomery County to other Washington area jurisdictions because each had different strengths and weaknesses. Also, they found that state related factors were more important therefore making it difficult to compare at the county level.

- Montgomery County's programs to support small businesses are highly welcome and praised, though public awareness of them appears to be mixed—ranging from low to high.
- According to business leaders, the regulatory environment in Montgomery County does not seem to be a major hurdle. In fact, they praised the county for helping small businesses understand it, and for being willing to review the environment for its impact on business.
- Business leaders expressed strong concerns over the costs of registering a business and employee licensure, exist over the costs of registering a business and employee licensure, conflicts between residential and commercial interests, and the process of obtaining permits in the City of Rockville. Concerns also existed over the high number of State of Maryland regulatory bodies.
- Business leaders expressed strong optimism for remaining in Montgomery County, based on specific entities (NIH, biotechnology, and health care providers), the workforce, quality of life, and belief that the county will continue to be progressive and grow. Other specific factors for staying or expanding in the county included availability of desirable and affordable business space, acceptable tax and fee burdens, utility quality and reliability (including Internet), efforts to relieve traffic congestion, and diverse job opportunities.

2.2.2 General Impression of Montgomery County as a Business Location

Key Takeaway(s):

- Business leaders praised Montgomery County for its high quality work force, convenience, proximity to major metropolitan areas i.e. Washington, D.C. and clients, business environment and quality of life.

Mostly, business leaders' impressions of Montgomery County were strong and positive for three specific reasons related to market and employee success:

1. A good (talented and experienced) workforce
2. A good consumer base for specific products (e.g., food, health care)
3. The county is "convenient" and has a good quality of life with many things to do (e.g., restaurants, entertainment), and proximity to Washington, DC and Baltimore (includes easy access to airports which helps recruit employees)

Additional areas of praise included good infrastructure (various kinds), access to a good mix of socioeconomic backgrounds to ensure customer volume and diversity, but also access to "high worth" prospective customers, county support for small businesses (including help with business-to-government networking and GovCon), close proximity to federal clients, and somewhat good proximity to State of Maryland clients. Generic praise included a "*good business climate.*"

The following quotes from interview participants provide examples of some of the different opinions on Montgomery County as a business location.

"It's well-populated and has urban, suburban, and rural diversity...and is conscious about health and sustainability."

"It's nice, convenient, and pleasant, it's not hostile."

Another driver of good impressions could simultaneously be viewed as an advantage as well as a disadvantage. According to the business leaders interviewed, Montgomery County is a great jurisdiction for health care and biotechnology companies due to proximity to major clients and resources (also decision makers) such as the National Institutes of Health (NIH), the Food and Drug Administration (FDA), the Centers for Medicare and Medicaid Services (CMS) and other Federal agencies and contractors. However, while this “biotech corridor” helps specific industries easily identify Montgomery County as a good location; it could also mean limited interest from other industries (e.g., real estate and manufacturing) who might not perceive strong alignment with their needs and interests.

One respondent said Montgomery is “*acceptable*” since it has good infrastructure and business promotion programs, but housing is too expensive for many employees and traffic congestion makes it difficult to get in and out of the county. Another participant stated, “*Anyone earning less than \$60,000 (per year) cannot function at a high level.*” Another warned that if a tax on information technology companies were implemented the county would no longer be desirable. A third respondent said Montgomery County is difficult for real estate businesses due to conflict between residential and commercial interests. Additional negative overall impressions also emerged, more specifically difficulties for businesses due to an “*enormous amount of restrictions on business,*” fair infrastructure quality, and high taxes. As one respondent stated:

“At every turn the county seeks more money from people do to business...fees and taxes.”

2.2.3 Availability of Business Space in Montgomery County

Key Takeaway(s):

- Overall, business leaders reported that Montgomery County makes quality business spaces available. However, respondents expressed uncertainty regarding the potential for business expansion.
- Generally, respondents found that cost for office space is high. While some saw costs as just too high, others felt the high costs were justified by factors such as accessibility to transportation.

Most respondents said Montgomery County’s business space is either excellent or good, based on the key metrics to evaluate availability. Primarily, praise was driven by a good amount of high-quality and varied types of space, appropriate and varied costs (price points), and competitive pricing with jurisdictions in the Washington, DC area. Further, the county has sufficient properties with the right amenities, such as space for client meetings, easy parking, proximity to public transportation and restaurants, proximity to the conference center in Rockville, and space for outdoor activities (e.g., jogging “*to blow off steam so we can work harder*”).

Also, while office space was tight a few years ago in the mid-2000s, it is now considered excellent due to the recent construction of much class-A and B+ buildings that “*fit any type of business profile.*” Another participant expressed a similar sentiment when stating “*There is plenty of space around and you can get it, plus they are building more and more.*”

However, it is also important to note that concerns arose over business leaders perceptions or experience with the county’s available space. Respondents noted that while current space is available, space for expansion is uncertain. Additionally, while availability and suitability are excellent, findings about costs were mixed. To some, costs are high but “*within reason*”, or easy to justify or accept based on good accessibility to transportation. Other respondents said that costs can be too high in general, and even “*out of line*” with other local jurisdictions (e.g.,

Frederick County). Also, one respondent noted that the high cost of business space leads to many business failures, and that is why space availability is good.

Respondents also offered that leasing costs tend to be high, especially for small start-up businesses, in part due to the perception (or reality) that the county is geared more toward larger businesses since there are no smaller spaces (e.g., 1,500 to 2,000 square feet) to rent and *“that is too big for what I need.”* One respondent offered the idea that the high costs of space made using a Regus shared office space the right choice.

In commenting on the availability of sufficient office space, one respondent also brought to light a concern over Montgomery County's tendency to privilege one business type or sector over others. The respondent noted that while Montgomery County has sufficient office space, the county does not have good space availability for non “white collar” pursuits such as manufacturing. As one respondent put it *“since they pushed it out in favor of white collar jobs that elevate the tax base, but went too far so that part of our business had to leave Montgomery County.”* That respondent recommended Montgomery County (and other counties) keep at least a minimum capacity for manufacturing for business diversity as a hedge against downturns in various industries.

Overall, the most common finding about business space availability was that it is quite good, but costs are high. Specifically, availability is good due to many office and retail vacancies (though office space availability in Rockville was criticized), including many sites already set up for specific types of business (e.g., restaurant).

2.2.4 The Overall Cost of Doing Business in Montgomery County; Taxes and Fees; Leasing Costs

Key Takeaway(s):

- In evaluating the county in terms of taxes and fees, most respondents gave the county a Poor rating.
- No clear consensus emerged from discussions on leasing costs. Some respondents found costs to be too high and out of line, while others found leasing costs to be excellent.

Overall Costs - Discussion among respondents about the overall costs of doing business in Montgomery County emerged in three pertinent ways. First was the excessive overall expense of doing business in Montgomery County, MD. Specific complaints emerged over cost drivers such as surcharges for transportation, sanitation, and water; the business personal property tax and the county income tax; the state gas tax and the tolls on the Inter-County Connector (and also costs related to traffic congestion); and unemployment fees. Reflective of these types of sentiment, one participant described the county simply as an *“expensive place to do business...based on the approval process and fees.”*

Second, costs were discussed as the down side to the drivers of good impressions, especially how the talented workforce demands high salaries, and because the good quality of life means housing and other needs are expensive (including high property taxes), which in turn drives salaries upward, as well. The effect of the cost drivers is higher overall costs that must be passed on to consumers through higher prices for products and services, or layoffs to help keep prices stable and competitive.

The third point about the cost of doing business was that business leaders found Montgomery County to be competitive and comparable with jurisdictions in the Washington DC area, especially for expensive but good quality of life and workforce. However respondents did note that better tax incentives for non-profits (including trade associations) were available in Fairfax County and Alexandria, Virginia. Respondents offered that while Montgomery County is similar to Virginia jurisdictions, they all have somewhat troubling state and local costs for registering a business, employee licensure and arduous revenue reporting to determine tax liabilities.

Another important and related topic that emerged from the interviews was the issue of expensive housing. Expensive housing was a concern for many employees, especially lower-income employees who face the tradeoffs of lower housing costs versus longer and more expensive commutes when choosing to live further from business districts.

Taxes and Fees – When respondents were asked more specifically about taxes and fees, discussion mostly showed moderate concern or uncertainty over their amounts. While some negative comments about high taxes and fees arose in the discussion of overall costs, specific discussion about them mostly showed moderate concern or uncertainty over their amounts. Some respondents did not know the tax rates, or how they compared to jurisdictions in Northern Virginia, but believe the rates are favorable enough to “*not have a large impact,*” or “*are not prohibitive.*” For example, one respondent did not know about taxes because the business has not yet turned a profit, and even when it did make a profit, its small size would mean a very low tax liability. Another respondent stated that tax rates and fees may not be a problem, but it is difficult to understand how they work, since the “*details are not visible.*”

Despite the lack of knowledge of by some respondents on the topic of taxes and fees, it should be noted that some concern arose over high income tax rates in Montgomery County. The interviews also included some distinction between taxes that are “what you would expect,” or what one would generally expect as part of doing business, versus costly permit, licensure, and certification requirements that should be “streamlined” rather than require multiple applications and fees (e.g., liquor, tobacco, occupancy, and more). Also, one respondent said Montgomery County is at the forefront of raising the minimum wage, and that effects “*everyone and puts a crimp in our ability to do business.*” Although, there was diversity of opinions and perspectives in the discussion surrounding taxes and fees, the most common comment from nearly half of interview participants in regards to probes to evaluate the county in terms of taxes and fees was “Poor.”

Leasing Costs – Among the research participant pool, findings about leasing costs in Montgomery County were mixed. To some, costs were excellent due to many options (“work-arounds”) for shared space and incubators that lower costs and make it possible for small businesses to operate (“the runway to success”) versus if they had to pay market rate.

Conversely, some believed rental (leasing) costs were too high, which significantly adds to the overall cost of business. Further, similar to the tradeoffs between housing and transportation costs, leasing costs along the I-270 corridor were less but those locations can be further from clients. Also, one respondent said Montgomery County leasing costs are 15-20% higher than some areas, such as Denver and Kansas City, but lower than in New York City and Boston. Not surprisingly, the respondent who noted being challenged by the minimum space size also had strong concerns about the cost of leasing.

For some respondents, the costs were not out of line. This was in part due to the potential volume of business in a specific area. For example, one respondent noted a different leasing

package in Montgomery County than in Tyson's Corner where specific items (e.g., telecommunications, parking) were charged separately, while in Montgomery County they are bundled but still are *"twice what it costs in Tyson's...but we wanted to be in Bethesda and not further out."*

2.2.5 Communication Infrastructure in Montgomery County

Key Takeaway(s):

- Overall, interview participants praised Montgomery County for its communication infrastructure. However, this praise for Montgomery County's infrastructure was paired with some concern over high costs and a limited number of service providers.

Mostly, communication infrastructure in Montgomery County was praised on the key metrics for such service. Specific areas of praise included excellent availability, connectivity, bandwidth, and services options. One respondent noted how good communication infrastructure enables company workers to work at home without depleted quality. However, there also was a distinction made that while the county does not provide the communication infrastructure, it should help ensure high quality, in part due to its importance to the tax base. Discussion about quality also noted how the Potomac Electric Power Company (PEPCO) has gotten better, and the City of Rockville has helped with back-up systems.

Some concern arose over the high costs of connectivity, and the limited number of service providers. Another area of concern was placing too much importance on one jurisdiction. Respondents offered that instead it is better to have data storage facilities in other locations, as a hedge against possible problems if all of it was in one location. The following excerpts represent the diversity of impressions and experience in this area:

"It's the heartbeat of the county...reliability is very important because we do research all over the world and they don't care about snow and wind."

"It's excellent because there are no transmission delays."

"Every building has access to fiber optics and broadband."

"A major urban area demands it (communication infrastructure)."

"We rely heavily on connectivity for data, and we have no issues with our secure files (in Montgomery County)."

"We just need access to the Internet, and we can find what we need."

"I would like to see more competition than Comcast and Verizon."

"Everything is available. Montgomery County is at the forefront."

When respondents were asked specifically about back-end support and data centers, more concern than praise arose for Montgomery County, though again, some mentioned those are not county-provided services (in Montgomery or elsewhere). Back-end support was called "fair" in Montgomery County since there is some access to *"data warehouses, byte farms, and the Cloud"* but more is needed. Also, one respondent said data centers can be built anywhere and Montgomery County should spend more money on them in general, and in competition with the many data centers in Virginia. One respondent praised the County Executive for trying to bring more data centers and other support services to the county, rather than allow Northern Virginia to continue to dominate those functions.

2.2.6 Quality of Life; Transportation and Ease of Movement & Public Transportation

Key Takeaway(s):

- Business leaders praised Montgomery County for high quality of living in areas such as housing, schools and public services. However, the county was also criticized in several areas such as high cost of quality housing and road and traffic congestion.

Overall Quality of Life - As noted briefly in the section on overall impressions about Montgomery County, the interviews included strong praise for quality of life. The following quotes taken from the interviews are reflective of this sentiment

"It's an excellent quality of life, and that's why I live here (Bethesda)."

"It's a pleasant place to live."

"Rockville is a revitalized city, with great restaurants."

"There is no there there...not just one center that everything revolves around."

"MCPS (Montgomery County Public Schools) is excellent and has many options, and that makes our employees happy."

Specific strong and prominent areas of praise for quality of life were for high-quality and varied housing (condominiums or detached single family), K-12 public schools and institutions of higher education, culture (e.g., Strathmore Music Hall), public services (including police and fire, and low crime rates), restaurants, retail shopping, and parks and bike trails. Also praised was proximity to Washington, DC arts, entertainment (including monuments and cultural institutions), and restaurants. Furthermore, the county was praised for having urban, suburban, and rural lifestyles available. One respondent said quality of life is also boosted by access to a responsive county government that will help know what is needed to start a business. One respondent noted that specifically the *"Office of Economic Development gives excellent advice for growing companies"*.

However, several areas of criticism, or caveats emerged regarding quality of life. Respondents noted that while housing is good, it is expensive including to the point where many people who work in the county cannot afford to live there. For some, rental housing is better for people who might not want to stay long term in the area while those who buy a house *"are establishing roots and probably will stay."* While transportation infrastructure is good, traffic congestion is a problem. Also, some disagreement or dissatisfaction emerged over the quality of public schools. For example, while education is good, more special education programs are needed.

The presence of both praise and criticism among research participants on this topic point to what one respondent characterized as the paradox of opportunity of living and working in Montgomery County by stating *"The quality of life is excellent, if you can afford it...everything is here."* Other respondents echoed this sentiment in stating that the quality of life depends on specific locations in the county. One criticized the *"polarized spectrum of quality of life depending on income."* Another spoke to this polarity in stating:

"It's a good quality of life, for people who earn enough (money)...it can be hard to compete for space and resources with the rich."

Ease of Movement - Findings about ease of movement within and to and from Montgomery County are mixed but more positive than negative. While respondents found that the county had a good road and highway system, traffic is only "fair," with too many dangerous potholes.

However, one respondent said traffic congestion indicates a strong, dynamic local economy. Also praised was proximity to three major airports, each an approximate 30-minute drive from homes or places of work and easy parking as well as good delivery service (e.g., taxis and Uber)

"I am happy when sitting in traffic because dynamic areas will have traffic...there is no traffic in West Virginia but property values are much higher here than there."

"Ease of movement is excellent if you have a car since the roads get you from point A to B."

Criticism from respondents focused on road congestion (especially during a.m. and p.m. peak travel times) and frequent road repairs (especially in Rockville and several down county areas). In addition parking in some areas (though was still favorably compared to parking in Washington DC) was both praised as being plentiful and criticized for being too expensive. In addition to concerns about personal delays caused by traffic congestion, one respondent said it makes it harder for customers to get to the store, and that could make them inclined to go elsewhere. Another respondent noted strong dislike for traffic enforcement cameras, calling them more about revenue for the county than anything else. Other comments on ease of movement included the following:

"I would go crazy if I had to commute every day...I try to make all of my meetings between 11:00 and 2:00."

"If you are not near public transportation who knows when you will get there?"

"It's easy to get to places, in the off hours."

"It's a good quality of life, but it takes too long to travel places...the ICC (Inter-County Connector) helps but (Interstates) 270 and 495 are not good."

"Traffic is too unpredictable."

Public Transportation - Like ease of movement, public transportation in Montgomery County received general and qualified praise, and criticism from respondents.

To some, overall public transportation is excellent. According to one participant especially *"If you are near it and your destination is too, such as Bethesda,"* and *"it is great to be able to walk to a Metrorail station."* Some respondents found that Metro had excellent regional coverage, but was too expensive, so for some, it was cheaper to drive. Metro was also highly praised due to widespread routes and access points. As one participant stated:

"There are bus stops on every corner, even in areas where you would not think they would be."

One respondent said the proposed new bus structure in the Rockville area would strengthen an already excellent public transportation system. Another thought the BRT with its spoke and wheel structure would hamper cross-county movement. A third respondent said the proposed Purple Line (rail) will help people move to and from their places of work.

In terms of criticism, one respondent said it is not easy to use Metro when carrying products from a warehouse to a retail outlet, and is not sufficiently accessible for small children, though is good for office visitors. Additional criticism emerged over poor service (or a lack of service) in some areas of the county.

2.2.7 Availability of Qualified Workforce in Montgomery County

Key Takeaway(s):

- Interview respondents cited Montgomery County's highly educated and talented workforce as a key strength.

Mostly, the workforce in Montgomery County was praised by business leaders, especially for being highly educated and motivated. Additional praise emerged for Montgomery County's workforce based on the quality of local universities (and Montgomery College) and turnover from staff at NIH and other organizations with highly skilled employees (including managers). Further, Montgomery County has more candidates, or "*an abundance of talent*" than many other jurisdictions (locally and nationally), though perhaps still lacks a sufficient number of candidates. One respondent commented on this when stating that the workforce is better in Virginia since a lot of people in technology fields gravitate to Virginia because there are more opportunities, and the cost of living and taxes are lower. Even still, Maryland "*has a good pool of workers.*"

However, like much of the praise in response to other interview questions, qualifiers arose. One particular qualifier arose among several respondents regarding their belief that the workforce is excellent only for specific industries or professions such as biotechnology and health care (e.g., nursing, support staff, housekeeping). Therefore, national recruiting is necessary for other highly specialized professions such as physicians and cyber security experts since low numbers of qualified personnel makes recruiting competitive and expensive regardless of location. Not surprisingly, the respondent who criticized the lack of manufacturing space also said a manufacturing workforce is not available.

2.2.8 Montgomery County and Proximity to Clients

Key Takeaway(s):

- Among the business leaders interviewed, Montgomery County rated highly in terms of proximity to clients (especially Federal agencies). However, this is not unique to Montgomery County. All jurisdictions in the Washington DC area enjoy the benefit of close proximity.

Findings about Montgomery County's proximity to clients were heavily driven by praise for being close to Federal agencies. This was in part due to the fact that several respondents did most or all of their business with one or more Federal agencies. As one respondent stated, "*The closer you get the easier it is to meet and create relationships...and have long-term business stability that keeps you here.*"

However, research participants also noted that all jurisdictions in the Washington, DC area enjoy close proximity to Federal agencies. Conversely, for some, proximity to clients was not an issue since business is conducted in multiple cities (domestic and abroad) with technology such as Skype and e-mail. Similarly, one respondent acknowledged that advances in communication and other technology make it less important to be in the same city or region for some businesses, while others continue to rely on close proximity. Proximity to clients was also highly praised, due to a large number of families, and people in their 20s and 30s, including local residents and tourists, all of whom are actual and prospective customers.

Proximity to airports is important, but some consider Montgomery County to have good airport access while others believe Northern Virginia is better (clearly related to the presence of two major airports in Virginia versus one in Maryland).

2.2.9 Montgomery County Business Climate Compared to other Jurisdictions & Montgomery County Regulatory Environment

Key Takeaway(s):

- According to business leaders, Montgomery County has a good business climate, especially for land-use planning and approval, and for continuing to consider how to retain businesses and attract employees.
- Business leaders most often compared Montgomery County to Northern Virginia. Although businesses in Virginia pay lower taxes, the difference is not seen as prohibitive.
- Respondents praised Montgomery County's programs to support innovation, small business, and entrepreneurship.
- Montgomery County's regulatory environment was both praised and criticized by interview participants. Praise focused on features such as being willing to review the regulatory process and distributing information for what businesses need to do. Criticism arose around areas such as the cost of registering businesses and the high number of regulatory bodies.

Business Climate – Interviewees mostly praised the business climate. Specific praise was for how the county (e.g., County Executive and County Council) was supportive for the land-use planning and approval process for opening a new business in general, and per specific industries (e.g., health care). Some also acknowledged the good effort by county officials and the Montgomery County Chamber of Commerce to facilitate productive business networking.

Business leaders also praised the County for how local and state officials think about how to retain businesses and how to position the business and the county in ways that attract prospective employees. Further, some believe Montgomery County has a better business climate than Prince George's and several counties in Northern Virginia that have over-emphasized attracting technology companies and government contractors. Business leaders did note that Virginia counties are trying hard to compete with Montgomery County and tend to have lower tax and regulatory burdens. Also, one respondent cited this research as a good example of trying to serve business needs. Other respondents offered that:

"The county is not complacent about the business climate, and is able to change with the times."

"They have never gotten in the way of us being successful."

"Since Ike Leggett was elected the climate is getting better and better (e.g., the permitting and approval processes)...and he understands things and sits and listens to both sides."

Findings were mixed when comparing Montgomery County to Washington, DC. On one hand, business leaders perceived the city to have more hurdles such as higher taxes and licensure fees. Conversely, respondents noted that Washington, DC recently started initiatives such as accelerators and incubators to attract new and diverse business types, and attractions such as Union Market to attract young professionals. According to a respondent who does business in

Maryland, Northern Virginia, and Washington, DC, *“everything is smoother here (in Montgomery County) due to affluent people and families”*.

Specific criticism of Montgomery County’s business climate was about being difficult to work with the county or get approvals (permits, licenses, etc.) for various things including opening a new retail establishment (*“the red tape is painful”*), and the Liquor Control Board that *“is not competent and lacks accountability since it’s government run, and is always out of products.”*

Programs to Support Innovation, Small Business & Entrepreneurship - Overall, business leaders highly praised Montgomery County’s programs to support innovation, small businesses and entrepreneurship. Interviewees also noted that awareness of these programs ranged from low to high. Specific praise was for the county’s ongoing consideration of new ways to use business incubators and the business-specific roundtable discussions. Research participants also praised how these programs help younger people (or recent college graduates) find jobs. One respondent spoke to the value of such programs when stating *“They are wonderful to have.”* Other participants offered similar praise when stating:

“It’s great to have the county as an investor in our business.”

“I really like the Maryland Economic Development Group...they reach out for networking and that’s refreshing.”

One respondent suggested that Montgomery County should include more programs that help train managers in general, and to handle changing cultural conditions inside companies and in society. Another respondent, who knew of special programs for small businesses but did not participate, commented on their ease of access and noted a desire to leverage more benefit from such programs. This respondent also suggested three types of programs: to encourage local government agencies to buy goods and services from local businesses; to help boost blue collar skills (e.g., facilities management) among local workers; and to create more business incubator space. One respondent suggested the county create, or at least support, an internship program for high school students to help them learn about and identify and connect with specific types of businesses.

Regulatory Environment - Business leaders’ responses about the regulatory environment in Montgomery County blended into comments about the county and the State of Maryland (with acknowledgement that throughout the U.S. pertinent regulations are at the state level). Overall, findings were mixed about Montgomery County’s business regulatory environment. Business leaders both praised and criticized the regulatory environment.

Strong praise emerged for the county’s regulatory environment as being appropriate, including for opening new facilities. Further, as noted in the section about quality of life, the Montgomery County government was considered accessible and helpful for small or startup businesses. The county was also praised for being willing to review and revise the regulatory environment-based business impacts.

“I have no complaints since we manage to do our business...nothing stands in our way.”

“The regulations all are reasonable and sensible, and are not overbearing...and if they start to get onerous the county government will help make them better...such as the cottage laws that they took down so they are no longer a barrier.”

“It’s benign, we have not had run-ins, and it doesn’t cost too much.”

Positive findings also included praise for a small number of requirements and regulations, being helpful in terms of distributing information about what a business needs to do for permits and

licensure, and good staff availability to answer questions. One respondent noted since Montgomery County is environmentally and socially conscious it leads to rules and regulations that might not be in force elsewhere, but the respondent has no problem with the amount of rules and regulation in the county, though other business owners might disagree.

Specific criticisms emerged about the county's regulatory environment in the following ways:

- 1) Criticism arose about the costs of registering a business and employee licensure. One respondent strongly complained about the permitting process in the City of Rockville, calling it *"cumbersome with multiple barriers."*
- 2) Unresolved conflict between commercial and residential interests over land use.
- 3) Strong criticism focused on taxes and fees, oversight and what respondents characterized as micro-managing by the Liquor Board, the Health Department, and others. Business leaders also cited the need for multiple steps to obtain permits and licenses, and long wait times for answers to questions. As one respondent put it *"The county tries to strangle business...the amount of regulations is out of line."*

Finally, regarding the state's regulatory environment, criticism arose over the high number of regulatory bodies that must approve various actions, which in business leaders' perspectives delays project execution and weighs on business decisions.

2.2.10 The Possibility of Expanding or Retaining a Business in Montgomery County

Key Takeaway(s):

- Highly qualified workforce, quality of life and the presence of certain industries (i.e. healthcare and IT), made Montgomery County an attractive place to remain in business for interview participants.

Interviews included strong optimism for remaining in Montgomery County for three specific reasons:

- 1) The highly skilled and experienced workforce
- 2) The ongoing presence of NIH, the biotechnology and other health care providers
- 3) Quality of life

Additional reasons to stay included respondents' belief that the county likely will continue to be progressive and grow and add transportation options. One respondent mentioned looking forward to the County Executive's six-point plan. Others commented:

"I like coming to work and I live nicely...and the workforce is stable."

"There's no question I'm staying...it's a wonderful place to do business...the new county government is bringing it into the 21st century."

Not surprisingly, the manufacturing-based respondent stated clearly that staying in Montgomery County would depend on being able to open a small manufacturing facility within the next 12 months (versus continuing to use one that requires a three-hour drive each way).

Overall, findings were mostly positive and optimistic regarding business expansion or retention in Montgomery County. The positive feelings were driven by a good track record of profitability in general, and due specifically to a large volume of high net worth current and prospective customers. Also, business leaders offered that expansion or retention is likely simply because the county is, and has been, a great place to live. However, respondents' enthusiasm for

expansion in the county was tempered by what they viewed as multiple and strict rules and regulations, micro-managing, and the high cost of retail space.

2.2.11 Top Factors for Business Location

Among the business leaders interviewed, the twelve factors listed below emerged as the most important for making business location decisions.

- 1) Quality of life, especially housing and transportation (commuting), for current employees and to bolster employee recruiting
- 2) Proximity to clients (especially Federal agencies) and the ability to get to them quickly (e.g., via Metrorail's Red Line and/or I-270). The proximity to clients also provided the potential to prosper.
- 3) Quality of workforce
- 4) Availability of suitable business space
- 5) Proximity to major airports
- 6) Local foot traffic day and night
- 7) Proximity to home
- 8) Communication infrastructure (high-speed internet)
- 9) Numerous alternatives for restaurants (for employees and clients)
- 10) Safety and security
- 11) Continuing population growth (for more potential customers and employees)
- 12) The regulatory environment

2.2.12 How Montgomery County's Reputation Informs the Business Location Decision

Key Takeaway(s):

- Montgomery County's reputation did not emerge as a key factor in business leaders decisions on where to locate a business.

Mostly, findings about the effect of Montgomery County's reputation were more about actual local factors than reputation, such as good retail space, quality of life, proximity to clients, high median income, and proximity to Washington, DC and Fairfax County Virginia that makes the county (and area) "*recession proof*." Others acknowledged the reputation has little effect due to minimal experience with the county or knowledge about it or its reputation. As one participant stated,

"The reputation does not matter much; we have been here more than 100 years and are here for the long haul."

Interview participants responses to this question reiterated the praise heard earlier, especially for quality of life, workforce, infrastructure, and proximity to Washington, DC. Further, business leaders found that Montgomery County fits the needs for business and for raising a family (especially the public schools).

2.2.13 Barriers that would Prevent Consideration of Montgomery County as a Location

Key Takeaway(s):

- Business leaders cited a number of factors that they considered barriers to Montgomery County as an attractive business location such as the deterioration of important quality of life factors or lack of diversity in types of job opportunities.

The five factors listed below were cited as potential barriers that could (but not necessarily would) prevent consideration of Montgomery County as a business location:

- 1) Cost increases beyond what is appropriate or reasonable, especially for office leasing, housing, taxes (including state taxes), labor, and utilities
- 2) Worsening traffic congestion and other crowding (e.g., loss of green space)
- 3) Unreliable utilities (especially Internet and electricity)
- 4) Insufficient diversity in the types of job opportunities and too much of a shift toward higher-level jobs and professions
- 5) Deterioration in certain quality of life factors, especially the outdoor environment and crime rate

2.2.14 Criteria or Factors that must be met before Considering Montgomery County for Business Expansion or Retention

Key Takeaway(s):

- For the business leaders interviewed, potential factors that could impact Montgomery County as a space for business expansion or retention included the availability of business space, technology infrastructure, incentives to attract non-profit organizations, and changes in taxes and in minimum wage.

When asked what if any criteria or factors must be met before considering Montgomery County as a business or expansion location, three specific suggestions or criteria emerged from the interview discussions. It should be noted that these criteria were not considered mandatory. The criteria were as follows:

- 1) The county must continue to have desirable and available business space.
- 2) The county should emphasize technology infrastructure (e.g., bandwidth).
- 3) There should be more aggressive incentives to attract non-profit organizations (e.g., supplements to help expand physical space and to offset employee training and commuting costs).

Additional factors mentioned that would inform their decisions were excessive distance (not defined) between home and work; sharp increase (not specified) in the minimum wage, and whether increases are sudden and sharp enough to not allow sufficient time to adjust since *"if consumers can't absorb it my clientele will resist ...and my workforce might have to shrink"*; sharp increases in taxes that could lead to employees making higher salary demands, and *"that could drive us to Frederick"*; and lease costs.

2.2.15 Resources to Help Consider Business Location

Key Takeaway(s):

- Interview respondents may consult variety of resources in making business location decisions. Based on interview participant responses, these ranged from fellow owners and businesses manager of similar businesses to emails and blogs from Montgomery County and real estate brokers.

Thirteen resources emerged as helpful for considering business locations. They are listed in no particular order; except the first bullet clearly was most prominent and points two and three received multiple mentions

- 1) County officials, including the Office of Economic Development, the Office of the County Executive, members of the County Council, and the Maryland National Capital Park and Planning Commission
- 2) Local real estate and office developers, including helping with information about schools, zoning, and taxes (in addition to business space availability and costs)
- 3) Various types of other specialists such as investors, business leaders, consultants and attorneys
- 4) Localized resources such as Bethesda Green
- 5) The State of Maryland, including the Department of Business and Economic Development
- 6) A local technology council
- 7) An intermediary
- 8) Fellow owners and business managers of similar businesses
- 9) Banks
- 10) Lopp.net (for commercial real estate)
- 11) Emails and blogs, including by Montgomery County, and by real estate brokers
- 12) General communications from Montgomery County (including from the County Executive) and by Frederick County Maryland
- 13) Personally-guided driving tours of prospective business locations

2.3 Site Selectors & Brokers

Interviews with site selectors and brokers were designed to examine decision-making process in determining or recommending an area as a business location. Interviews sought to explore some of the key factors or issues location specialists/consultants and brokers considered when selecting and advising on locations for businesses seeking to relocate. Interviews examined respondents' experiences in general but also, more specifically, how those experiences related to Montgomery County, MD as a potential business location. Nine interviews were completed with site selectors and brokers in various locations. (See table below.)

Table 30: Interviews with Site Selectors & Brokers

Respondent	Respondent Type	Location
L	Site Selectors	SC
M	Site Selectors	TN
N	Site Selectors	VA
O	Site Selectors	SC
P	Site Selectors	VA
S	Site Selectors	DC
T	Broker	MD
X	Broker	MD
Z	Broker	MD

2.3.1 Summary of Findings

The findings below are based on interview participant responses. They summarize the more detailed interview responses to specific topics and questions that follow:

- Most of the respondents contact with Montgomery County has been with the Office of Economic Development (OED); favorable impressions of the contact outweigh the negative.
- Specific evaluation of Montgomery County sites or officials by interview participants was subdued, due to minimal experience, passage of time, or working with multiple jurisdictions. Further confusion occurred among interviewees when trying to distinguish contact with Montgomery County and the State of Maryland.

According to this set of respondents, the most suitable types of organizations for Montgomery County are life sciences, biotechnology and biometrics; defense and other government contractors; and corporate headquarters (multiple industry types).

- Site selectors and brokers identified workforce and quality of life as the most important factors in selecting/recommending a business location. Montgomery County rated well on both (especially highly educated workforce and good housing and public schools), though high costs for labor and housing and traffic congestion were cited as concerns.
- Incentives are not important until lists of potential sites have been paired to three to five finalists, and then can be quite important.
- According to the site selectors and brokers interviewed, Montgomery County compares favorably to Howard and Prince George's counties on many factors, although Howard County appears to be rapidly catching up.
- For this set of interview participants, Montgomery County appears to be similar to Fairfax County on most factors. Comparisons tended to be more about Maryland versus Virginia. Arlington County and Washington DC were considered more urban than Montgomery. Loudoun and Prince William were considered more rural which made comparisons difficult for respondents.
- Site Selectors and brokers perspectives on sites were often more regionally-based than specific to Montgomery or other counties, especially for key factors such as workforce, proximity to customers and competitors, transportation, housing quality and costs, and the generally high cost of living.
- Northern Virginia appears to rate more favorably than Maryland, mostly due to the costs of doing business (business climate) and a more cooperative (but still qualified) workforce.
- Interview participants' responses indicate that the Washington DC area seems to be Montgomery County's primary area for domestic competition.
- Good communication and relationships with the right people who provide accurate and timely information drove a good experience with a jurisdiction for respondents. Conversely, poor or missing communication and slack efforts made it difficult to work with a jurisdiction.
- In addition to OED, primary sources of information for respondents included Federal agencies, local employers and business and political leaders, local data vendors, Google, and real estate brokers. Site selectors' in-house proprietary databases were also important.

2.3.2 Past Professional Interaction with Montgomery County

Key Takeaway(s):

- Overall, respondents' past professional interactions with various Montgomery County people or offices has been positive.

Person or Office - The most commonly mentioned contact was with the Office of Economic Development (OED), including specific and easy top-of-mind recall, or generic mention of economic development staff, economic development authority, or "*various support teams*." Responses also included mention of OED as an overall resource, or more specifically for information about incentives. In response to this question, one respondent offered that, "*The best source for information about white collar or existing office space is real estate developers, while for build to suit 'green fill' it's economic development staff.*" In addition to the OED, the six contacts listed below also were mentioned.

- 1) "Park and Planning" (Maryland National Capital Park and Planning Commission)

- 2) The County Council
- 3) The Office of the County Executive
- 4) Real estate developers (sometimes referred by local economic development staff)
- 5) A colleague whose office is in Tyson's Corner (for a person whose office is not in the Washington, DC area)
- 6) Boards of Directors of other non-profit organizations

Two additional findings are noteworthy and perhaps problematic:

- 1) For some, memory of Montgomery County is weak due either to no recent experience (e.g., not in three or six years) or minimal experience and no actual site recommendations for the county.
- 2) Some also have difficulty distinguishing contacts with Montgomery County and the State of Maryland.

Impressions of Communications

Key Takeaway(s):

- Generally, Montgomery County received positive feedback regarding its interactions with site selectors and brokers. However, some concern arose around areas such as the amount of staff turnover.

Mostly, impressions about contact with Montgomery County were positive, including specific and generic praise. Specific praise was for being very responsive with timely information for both the site selector and clients, and being welcomed to OED's office for in-person meetings. Generic praise included words like "fine," "professional," "high quality," and "no complaints."

In addition to the praise site selectors and brokers offered about their communications with Montgomery County, three areas of concern also arose in the interviews about impressions of contact with the county. These were:

- 1) While OED staff "*genuinely tries to help and is well meaning,*" the county's zoning and permitting processes "*make it a hard place to do business...with unnecessary regulations that make things take far longer.*"
- 2) At times the State of Maryland "*leads you to Montgomery County, but then you are on your own without a rational reason for why.*"
- 3) The amount of staff turnover at the OED within the past six to 12 months is disappointing.

2.3.3 Have you Recommended Montgomery County as a Business (Re) Location

Key Takeaway(s):

- Many site selectors or brokers recommended Montgomery County to their clients. In some instances this was related to previously mentioned key strengths of Montgomery County such as access to a diverse and qualified college graduates who could become part of their employee workforce. Other reasons related to items such as the County's presence in the biotech and life sciences industry. Those who did not recommend Montgomery County did so for generic reasons.

Several respondents have recommended Montgomery County to their clients. One has recommended Montgomery County "many times" especially for life science and biotechnology companies due to the county's incubator programs, existing laboratory space, and proximity to

major research universities and the National Institutes of Health (NIH) and the Food and Drug Administration (FDA). Another respondent has recommended Montgomery County because it is highly suited for data networks, financial services and food distribution companies. A third respondent recommended the county due to being the “*right place for the client’s investment*” since it has higher education resources and graduates “*from community college through post docs.*” One respondent even described Bethesda as the potential “*next Palo Alto*” because “*it has everything you would want to locate a technology hub...labor, basic infrastructure, public transportation, excellent housing and amenities, and is near a big city.*”

Several respondents have not recommended Montgomery County, though mostly for generic reasons such as not “*having the right project for the county*” or no jurisdictions in the Washington, DC area have made it to list of finalists. Specifically, one respondent has not “*gotten to that point,*” mostly because his clients typically look for industrial rather than office space. One respondent said no distinct factor has prevented a recommendation for the county, and based on clients’ customized requirements some locations fit better than others. According to this respondent, Perfect choices or single dominant factors do not exist. Another respondent stated s/he would be hesitant to recommend the county due to the State of Maryland’s growth management plan that will limit the size of available sites (e.g., below 200 to 400 acres), and the state’s aggressive plan to seek Federal agencies whose pay scales and other operating characteristics will make it harder for his clients to compete for labor.

Based on participants’ responses, the following seven types of companies, organizations etc. would be a good fit with Montgomery County, (with the first three dominant based on a composite of frequency and tone.)

- 1) Defense and other government contractors (clearly related to proximity to multiple Federal agencies)
- 2) Life sciences, biotechnology (but not information technology) and biometrics (also related to Federal proximity, but also research universities)
- 3) Corporate headquarters (e.g., finance, legal, hospitality, defense, and cyberspace).
- 4) Lobbyists
- 5) Think tanks
- 6) Trade associations
- 7) Cyber security organizations (based on proximity to the National Institute of Standards and Technology and the National Aeronautics and Space Administration)

While questions about the types of companies or organizations not suited for Montgomery County was not asked, manufacturing arose during this part of the interview.

2.3.4 Key Factors in Providing Advice on Where a Business Should (Re) Locate

Key Takeaway(s):

- Workforce, quality of life, operating costs, proximity and the general business climate emerged as key factors in providing advice on where to locate a business.

While one important finding here is “no one size fits all, and it depends on the specific needs of the client,” two factors arose as most important in these interviews: workforce and quality of life.

Workforce - Workforce clearly was the most important factor to emerge in these interviews, especially availability of qualified labor for specific needs. Availability includes “*trainability*” or “*transferring skill sets*” where new skills, methods, etc., can easily be learned regardless of

existing education and skills. Other somewhat important workforce issues discussed were costs (wages/benefits), local laws or unions regarding right to work and workers compensation, etc.

Quality of Life – This was the second most important factor, and was nearly as prominent as workforce. The most important specific quality of life factors were housing (quality, costs, and property taxes), K-12 public schools, and commuting time and effort.

Higher education was also mentioned. One respondent specified the quality of life criterion is especially important to higher paid, more senior levels of employees. Another offered that quality of life for “millennials” is urban-based, such as “24/7 work and play where 5:00 to 9:00 (PM) is just as important as 9 to 5.”

Three other factors also arose as important, but somewhat less than the first two. These were operating costs, proximity, and generically, the general business climate.

Operating Costs - While also a workforce issue (discussed above), cost of labor was seen as a key operating cost. Other important operating costs mentioned were utilities, taxes (specific such as corporate or property, or general tax rates) and transportation.

One respondent noted the impact of taxes can depend on a client’s type of business and revenue streams, and for example noted how the parent company of a call center pays revenue-generated taxes based on its location, regardless of where the center is located.

Proximity - The issue of proximity includes both desirable and undesirable factors. Site selectors and brokers found it desirable (important) to be near suppliers and vendors, and customers, depending on the type of business. Plus, as discussed earlier, proximity to multiple and specific types of Federal agencies and research entities is a specific factor. Another desirable type of proximity is easy access to airports to either visit or be visited by customers and others.

The undesirable type of proximity cited was being too close to competitors (“competitor avoidance”), though in some cases the proximity of similar types of businesses (competitors) indicates a good jurisdiction for business.

General Business Climate - While the business climate is a generic factor, respondents noted that the concept of being “business friendly” was related to long-term operating costs driven in part by the level and types of regulatory and tax policies. Furthermore, a county’s reputation, label or “brand perception” in the marketplace can be as important as empirical evidence.

Other Factors - Availability of suitable space, and strong public infrastructure also were mentioned, but it appears to a large extent satisfaction with those factors depends on the specific client, including the number of employees and their needs.

The Role of Incentives

Key Takeaway(s):

- The impact of incentives only came into play under certain circumstances such as comparing jurisdictions. Incentives were rarely the sole factor in making business decisions.
- Respondents identified tax breaks, headquarters tax credits against corporate tax liability, or research and development credits as key incentives.

Incentives rarely emerged in the interviews until it was specifically queried. By far the strongest finding about incentives was that they come into play after a list of potential jurisdictions has

been paired to a few (e.g., three to five) finalists. At that point, incentives can play a significant role, including possibly as “deal breakers” (if none are offered) or as ways to compare jurisdictions and “help make the final decision...when any site will work.” Further, without already being suitable, a site will not be chosen based only on incentives. Consider the following comments:

“Incentives will not make it go from the wrong to the right project...or will not overcome a fatal flaw.”

“Incentives are icing on the cake, but first it needs to be a good location.”

“It needs to be a good location, and if not, the government cannot offer enough money to make it worthwhile.”

“Everyone thinks incentives are important, but they are less so than the key factors.”

A key incentive can be tax breaks, whose actual, applied value is calculated based on a 20-year pro-forma. One respondent said Montgomery County would not do an offset related to the 20-year horizon. Other key incentives can be payroll tax rebates, headquarters tax credits against corporate tax liability (for regional or national headquarters), and research and development tax credits.

2.3.5 How Does Montgomery County Meet or Fail to Meet Those Criteria; How Does Montgomery County Compare to Other Jurisdictions in the DC Metro Area?

Key Takeaway(s):

- In terms of key factors considered in site selection decisions, Montgomery County was praised by respondents for features such as an intelligent workforce and high quality schools. Concerns arose in other areas such as the perception that Montgomery County is not a business friendly environment and the costs and challenges of commuting.
- Montgomery County compares favorably to Howard and Prince George’s counties on many factors, though Howard appears to be rapidly catching up.
- According to this set of respondents, Montgomery County appears to be similar to Fairfax County on most factors. Comparisons tended to be more about Maryland versus Virginia. Arlington County and Washington DC were considered more urban than Montgomery. Loudoun and Prince William were considered more rural which made comparisons difficult for respondents.

Montgomery County - Interviews included much praise for Montgomery County and the key factors for site selection. Specific praise was for a very smart and well educated workforce (especially for biotechnology), great space availability for technology and research companies, close proximity to NIH and FDA, good quality of life (especially housing), great K-12 public schools, and great hospitals. The following quotes are reflective of the praise the County received:

“The great schools are why a lot of people commute from Virginia to Maryland.”

“Montgomery County is not weak on any of the big criteria (key factors).”

Interviews also included strong concerns about Montgomery County such as the following:

- High cost of housing and labor
- Cost and challenge of commuting (within the county or to other counties)

- Unsuitable space (e.g., for call centers or manufacturing)
- More “*layers of staff*” and slower approvals in regulatory bodies such as MNCPPC and the County Council whose members “*are not elected on a pro business platform*”

Further, even without empirical evidence, the perception among this group of participants existed that Montgomery County is not business friendly in general. This perception is related to higher taxes (including having more people subject to the “millionaire’s tax”) and weak site location incentives. As one participant noted:

“The county does not use incentives well since they do not have many tools available, and don’t use them effectively...instead there is hostile tax and regulatory policies.”

Another source of concern emerged in the interview sessions. Consider the following statement made by a research participant:

“Bethesda is one of the nicest areas and has good class-A office space, but access to the area is not good.”

This statement demonstrates that while site selectors and brokers recognized that Montgomery County offered good office space access to that space is not always easy.

Montgomery County vs. Other Jurisdictions - Much of the conversation about Montgomery County and the key site selection factors blended with comparisons of other jurisdictions, including specific counties and Maryland versus Virginia.

In terms of positive assessments, respondents considered Montgomery County the most desirable DC-area jurisdiction in Maryland (specifically compared to Howard, Prince George’s, and Frederick Counties). This assessment was especially true as it related to K-12 education and parks. By offering a negative critique on neighboring Prince George’s County (stating that it has a reputation for corrupt government, crime, blight and poor infrastructure and services including schools), one respondent identified what s/he saw as positive about Montgomery County describing it as “*the business engine of the state*” and described it as “*head and shoulders above the rest.*”

According to responses, it appears that Howard County is becoming a strong competitor to Montgomery County based on the following:

- Good housing options for executives and lower-level employees
- Schools approaching the high quality of Montgomery County
- Proximity to the National Security Agency (for cyber security companies)
- Proximity to Baltimore-Washington International Airport (praised specifically as good for business travel)

Also, to some, Howard County generically is considered more business friendly than Montgomery.

Cost of living also emerged as a concern. For example, one participant stated, “*Many people work in Montgomery County but can’t afford to live there.*”

As for specific counties in Virginia, the interviewees found that Fairfax County was a “*suburban peer*” to Montgomery County, especially for quality of life. Arlington County was considered more urban (with all of the applicable pros and cons) than both. Respondents found that Loudon and Prince William Counties were not as developed and therefore not as desirable for some clients, but their lower land costs are attractive to industries such as data centers. One

respondent said Winchester, Virginia is more *“attractive than around the Beltway due to better quality of life.”*

Findings were mixed when comparing Montgomery County to Washington, DC. For some respondents, Montgomery County compared favorably on most key factors, except for clients *“who need to be downtown.”* Further, respondents found that Washington, DC had *“severely constrained space,”* and thus either is more expensive or simply not available.

Some interesting results emerged as discussion turned to the preferences of younger and technology based employees. According to research participants, younger and technology-based employees tend to prefer urban locations to live and work. While Montgomery County has areas like Bethesda, Rockville, Silver Spring, and others, that demographic is more likely to prefer DC. Older workers are more likely to prefer suburban areas. One participant described this scenario when stating, *“Younger people are more willing to trade space for green attitudes and the need for less, along with being more comfortable sharing space.”*

Maryland vs. Northern Virginia - Northern Virginia received strong praise on its own and in comparison to Maryland for several reasons. Specific praise for Northern Virginia was about:

- 1) Stronger and better-funded training programs (based on the number of jobs created and payroll size)
- 2) A more cooperative or “less entitled” workforce based on lower wages and salaries and demands
- 3) Working conditions
- 4) Lower lease costs
- 5) Easier local access (specifically comparing Bethesda versus Tyson's Corner)
- 6) Proximity to airports
- 7) Better higher education

Further, Virginia counties have more and larger clusters of Federal contractors (e.g., four or five versus only Lockheed Martin in Montgomery County) and the workforce tends to gravitate to close proximity to such jobs, as seen in housing patterns and interaction at networking and business events.

Generically, Northern Virginia is considered to have a more favorable (“vibrant”) business and tax climate and “attitude” (including more aggressive tax credits and other incentives). To some, it seems in recent years Northern Virginia has grown faster than jurisdictions in Maryland, and that is driven by specific positive factors (e.g., stronger incentives), and other less clear reasons.

The Overall Washington, DC Area - Much of the discussion in the interviews was about how benefits and challenges across the DC metro area are not limited to any single jurisdiction, and comparisons can be difficult or unreliable since *“they are not dramatically different.”* In this area, a regional perspective was important for key factors such as:

- Workforce (availability, wages, and trainability)
- Proximity to customers and competitors
- Transportation (density and commuter patterns)
- Housing quality and costs
- The generally high cost of living

Therefore, site selectors *“don’t pay attention to county lines.”* Two additional regional perspectives (or dilemmas) arose.

- 1) First, clients often need higher density jurisdictions to ensure sufficient workforce availability, but know higher density usually means more traffic congestion and harder commutes.
- 2) Second, while availability of suitable office space is important, lower occupancy rates could indicate problems in a jurisdiction (e.g., particularly bad traffic patterns) or with the companies located there (e.g., layoffs).

2.3.6 Geographic Areas Considered to be Montgomery County's Top Competitors

Key Takeaway(s):

- While the Washington DC area seems to be Montgomery County's primary area for domestic competition due to types of clients, other metropolitan areas in the Southeast, Northeast, Midwest and the South also emerged as geographic areas of competition for different reasons. For example, Boston and North Carolina present strong competition because of their Research Triangles for life sciences companies.
- According to respondents, international competition has not emerged as a major area of concern.

Domestic Competition - Two types of findings emerged about competition from domestic areas outside metropolitan Washington, DC. First, even though for some site selectors the Washington, DC area is the primary or perhaps only geographic consideration due to types of clients, the nine metropolitan areas listed below emerged as competition (listed alphabetically).

- 1) Atlanta
- 2) Boston
- 3) Charlotte
- 4) Chicago
- 5) Dallas
- 6) Denver
- 7) Minneapolis
- 8) New York City (especially for the financial industry)
- 9) Raleigh/Durham (Research Triangle)

The second type of finding came from four descriptors or explanations:

- 1) Competition varies based on "economic verticals," such as strong competition by Boston and North Carolina's Research Triangle for life sciences companies.
- 2) Interpersonal (e.g., parents of school-aged children) and corporate competitiveness in the Mid-Atlantic, including for quality of life, will drive companies to the South.
- 3) Areas where the costs of doing business or costs of living are lower are considered "second tier" cities but not necessarily inferior in overall location profile to high-cost areas such as Washington, DC, Boston, New York City, or San Francisco.
- 4) Clients often will know whether they want to be on the East or West Coast, so that perspective limits competition. Companies based in Europe desire the East Coast while Asian companies desire the West Coast.

The following statements are representative of some the opinions and perspectives expressed by research participants on the topic of domestic and international competition:

"The competitive factors are similar size and quality of life."

“The Washington area competes against other urban metropolitan areas, especially on the East Coast...but Montgomery County is somewhat more expensive, versus places like Atlanta or Charlotte.”

“Montgomery County’s advantage is proximity to the Federal Government (especially NIH and FDA) and academic research centers, and without that there is not much left.”

International Competition - These interviews found very little about international competition to Montgomery County (or metropolitan Washington, DC). Many respondents have not considered areas outside the U.S. due to their clients’ primary focus on working with the U.S. government (including the need for in-person meetings), and the higher likelihood of finding qualified subcontractors. Further, for some, it is hard to make “*apples to apples comparisons (with areas outside the U.S.) in part due to national considerations.*”

One respondent could not name international competitors for Montgomery County but believes the county should be more proactive in competing for interest among many companies, especially in biotechnology, based in other countries.

As noted, international competition was a minor factor here, but the five cities listed below emerged as potential competitors (again, listed in alphabetical order):

- 1) Amsterdam
- 2) Brussels
- 3) London (considered very expensive)
- 4) Montreal
- 5) Toronto (“an outstanding city and population, and has great international air service.”)

2.3.7 Areas Recommended in the DC Metro Region

When asked specifically about recommendations for Washington DC area jurisdictions, responses included:

- 1) Arlington County (good for those interested in urban counties)
- 2) Fairfax County (good for corporate headquarters due to lower costs and available workforce)
- 3) Howard County (due to high ratings on all key factors)
- 4) Montgomery County (due to quality of life and highly educated workforce)

Further discussion about specific recommendations noted DC area locations often make the initial list of considerations, due to positive factors such as workforce and quality of life, but are not on the lists of finalists due to high costs and better international air travel service elsewhere.

One respondent said none of the DC area jurisdictions are “*universal never look-ats,*” and each client’s individual analysis plays an important role.

2.3.8 Experiences that Made Working with a Jurisdiction Easy or Difficult

Key Takeaway(s):

- Respondents cited good communication and relationships with knowledgeable staff that provided timely and accurate information as the key driver in having a good experience with a jurisdiction.
- Subpar interactions with staff and local officials, ranging from poor attitudes to frequent turnover of economic development staff, made working with a jurisdiction difficult.

Easy - By far, the strongest finding about what makes it easy to work with a jurisdiction centered on good communications.

Three specific methods of good communications emerged:

- 1) Site selectors want the identity of people who have good knowledge about local business conditions, especially workforce and types of companies present and about the community's vision and strengths and weaknesses (also considered "brand awareness").
- 2) Selectors want clear lines of communication and continuing relationships with senior-level staff or officials who are knowledgeable and committed to the process and will answer specific questions with thorough, accurate and understandable data and other information, often for up to 30 different criteria.
- 3) Local officials (and others) should be prepared to discuss specific opportunities, and deliver prompt or timely (within two weeks) response to inquiries.

Respondents offered other important ways to make it is easy to work with a jurisdiction. These include:

- Efficient visits for the site selector and/or the client
- Good knowledge of local sub-regions and how to get there
- Awareness of how comments (promotions, competitive arguments) will be perceived or interpreted

One respondent noted the Governor of Virginia is actively involved in economic development, while that is not the case in Maryland.

"It should have the perception or reality of being business friendly...but Maryland has a stigma of not being business friendly."

Difficult - The eight items listed below were cited as making it difficult to work with a jurisdiction, listed in no particular order. .

- 1) Missing deadlines for information
- 2) Being late for meetings
- 3) Poor attitudes among economic development staff (*"They need to take the time to understand the company they are talking to and not be glib about community programs not relevant to the client."*)
- 4) No response to phone calls and e-mails
- 5) Frequent turnover of economic development staff
- 6) A poor website (weak information, difficult navigation)
- 7) "Bait and switch" where initial contact will be with senior officials but then *"too often the responsibility is given to middle-level bureaucrats with limited sales skills and authority to make deals."*
- 8) Lack of suitable sites or sites ready for build-out and occupancy

The following comments speak to the perception of working with Montgomery County. These range from insights on communication to organization:

"Don't wear me out with communications (e.g., too many e-mails)."

"A one stop shop is better, but Montgomery County is an alphabet soup of programs and it's hard to know which to work with...and how to get a project permitted and built."

"It should have the perception or reality of being business friendly...but Maryland has a stigma of not being business friendly."

2.3.9 Information Sources for Recommendations

Key Takeaway(s):

- Site Selectors used a variety of sources to gather information that inform their recommendations. These range from using technological resources i.e. conducting Google searches and sophisticated computer programs to utilizing contacts with local political leaders.

In addition to generic comments about information from local economic development officials and direct personal experience, the 15 items listed below were cited as information sources for recommendations. These are listed in order of prominence based on a composite of frequency and tone:

- 1) Federal data, especially the Bureau of Labor Statistics (U.S. Department of Labor), the Department of Commerce, and the U.S. Census
- 2) Local employers and business leaders and local data vendors
- 3) Local political leaders, including the Office of the County Executive and the ombudsmen
- 4) Local transportation data, patterns and plans (for movement of employees and products)
- 5) Google searches based on keywords for multiple topics
- 6) In-house proprietary databases
- 7) Real estate brokers (often, but not always locally-based)
- 8) ArcView computer program
- 9) Co-star
- 10) Career Builder
- 11) Economic Research Institute (for population statistics and labor force data such as wages, skill sets and turnover)
- 12) Geographic information systems (GIS) for quick, comparable desktop analyses
- 13) LinkedIn (to see types of employees and specialized skill sets)
- 14) Local cable access TV (e.g., Channel 8)
- 15) Site Selectors Guild

One respondent described it as a "progressive strategy," starting with publicly available information and government databases, continuing to the purchase of macro analyses to narrow down the choices, and finishing with analysis of micro, local data from a specific jurisdiction and local employers. Another said that, *"Through our proprietary database there is very little we can't tell about Montgomery County, including growth, housing trends, education, and workforce."* A third respondent said, *"Information is ubiquitous these days, with multiple sources for baseline data and online comparable datasets."*

2.4 Meeting Planners

Interviews with meeting planners were designed to focus on the decision-making process in determining or selecting a meeting planning site or venue. Interviews concentrated on key factors or issues professional meeting planners considered when selecting locations for meetings. Interviews sought to examine meeting planners' experience(s) in general but also, more specifically, how those experiences related to Montgomery County, Maryland as a potential site. Five interviews were completed. This table provides details on this group of respondents.

Table 31: Interviews with Meeting Planners

Respondent	Organization Type
E	For Profit Corporate
F	Professional Membership Association
G	Consulting
H	For-Profit Corporate
I	Faith-Based

2.4.1 Summary of Findings

The findings below are based on interview participant responses. They summarize the more detailed interview responses to specific topics and questions that follow:

- Overall, interview participants felt Montgomery County has a lot to offer, with a wide variety of experiences to be had, but under-markets itself to meeting planners who are otherwise unaware of what opportunities Montgomery County provides.
- Respondents felt that the main improvement Montgomery County could make as a meeting destination would be to focus on increased marketing of its venues, accommodations, and attractions.

2.4.2 Experience in Montgomery County

Key Takeaway(s):

- The majority of meeting planners interviewed had some experience organizing and hosting small to midsize meetings in Montgomery County. Those who had not planned an event in Montgomery County cited a lack of activities (in comparison to Washington DC) and the belief that the County could not adequately meet their needs.

Of the five meeting planner interviewees, three had previously organized a meeting in Montgomery County. The majority of meetings they had planned seemed to be on the smaller side, though their estimates of Montgomery County’s potential accommodation sizes were inconsistent. Two of the meeting planners organized meetings in the range of 50 to 100 participants, while the third organized a meeting in Montgomery County in the 400 to 500 participant range.

The two meeting planner interviewees who had not previously organized a meeting in Montgomery County both considered the area, but felt that Montgomery County could not accommodate their needs. One claimed to need a larger meeting space area, while the other opted for the District of Columbia because it has more to offer all around.

2.4.3 Advantages of Hosting Meetings in Montgomery County

Key Takeaway(s):

- According to the meeting planners interviewed, access to public transportation and attractive price points make Montgomery County an attractive meeting location.

A majority of (three of the five) meeting planners specifically identified access to public transportation as the main advantage of Montgomery County (with a fourth implying it). One respondent mentioned specifically that having access to two different international airports nearby (BWI and Reagan) makes Montgomery County an attractive location for planning meetings for out-of-towners.

Two of the planners strongly emphasized the attractiveness of price points in Montgomery County, especially as compared to the District of Columbia. One of the planners felt that the range of price points available in Montgomery County meant that planners could organize meetings ranging anywhere from bargain to luxury. In a related assessment, another planner felt as though Chevy Chase and Bethesda were the only areas in Montgomery County where a higher-end experience could be provided for meeting participants.

2.4.4 Disadvantages of Hosting a Meeting in Montgomery County

Key Takeaway(s):

- Interview participants identified several factors that detracted from Montgomery County as an attractive event location such as difficulty in getting to/from different meeting locations and lack of appropriate venues.

Unlike with the advantages of Montgomery County, there was no consensus on major disadvantages. Each respondent offered a different response. One stated that the main disadvantage of hosting a meeting in Montgomery County is simply “not being in DC.” Similarly, another felt as though it was difficult to get to off-site event locations if the main meeting is held in Montgomery County. Therefore, they prefer DC where meeting participants can easily get from a main meeting location to an off-site on foot or in a cab. Echoing that sentiment, one planner said simply that there is a lack of quality transportation in Montgomery County, although—as seen in the previous response—the other four would disagree. Nonetheless the planner felt that Montgomery County was only accessible if a meeting took place along the Red Line. Otherwise participants would have to navigate the complex and less reliable bus system. This respondent felt as though only the few places directly on the Red Line were accessible, leaving most of the county undesirable.

In response to prompts about venues, one respondent offered that Montgomery County does not offer venues with large enough meeting spaces to accommodate their needs. Another cited the lack of “real resorts” in Montgomery County offering spas, golf courses and other luxury accommodations as a deterrent to planning a meeting in Montgomery County.

Finally, one meeting planner offered a divergent perspective in stating that Montgomery County had “no advantages.” However, the respondent qualified this statement by articulating the belief that Montgomery County tends to get overlooked in part because other jurisdictions do much more in the way of marketing to planners, arranging events and tours, taking them to different areas to show them the advantages of the location, etc. To the respondent’s knowledge, Montgomery County has only arranged one such tour. This respondent strongly believes that if

Montgomery County organizes more of these types of events, more planners would begin to look at Montgomery County as a potential meeting site.

2.4.5 Influences on Selecting Montgomery County for a Meeting

Based on interview responses, the main reason meeting planners organized events in Montgomery County was that their clients were based there or very nearby. That said, respondents have organized meetings in Montgomery County for non-locally-based clients, especially, as one planner noted, when their budgets were a good match for the area.

2.4.6 Comparison of Montgomery County to Other Locations

Key Takeaway(s):

- Meeting planners felt that Montgomery County is comparable to Washington, D.C. as an event location and offers unique historical points of interests as well as performing arts venues. However, meeting planners suggest that Montgomery County's options for transportation are less amenable than options available in Washington, D.C.

Meeting planners had divergent responses to this topic. There was no real consensus among responses. However, one notion that respondents tended to agree on was that Montgomery County is comparable as a meeting destination to other places such as Washington, D.C., and Northern Virginia. One meeting planner clarified this sentiment in stating that Montgomery County is comparable to DC, but that Northern Virginia is a poor meeting destination in comparison to Montgomery County and Washington, D.C.

It was also noted that Montgomery County provides different kinds of historical points of interest to Washington D.C. and that there are more performing arts venues in the area, suggesting again that with some targeted marketing strategies to make meeting planners more aware of these kinds of attractions, Montgomery County could attract more events.

On the negative side, meeting planners pointed out that Montgomery County's transit system is inferior to Washington D.C.'s (where meeting attendees could easily walk to different locations or hail cabs) and that Montgomery County is more spread out which requires more transit to get around than the city. Another meeting planner also felt as though the venues in Montgomery County are inferior to those in Washington, D.C. This respondent cited smaller hotels, venues with fewer breakout rooms, and fewer activities to engage in when meetings were complete as the reasons for his evaluation.

2.4.7 Key Factors in Making Meeting Planning Location Decision

Meeting planners shared priorities when it came to identifying the main factors they considered when making decisions on where to host meeting and events. The three main factors were:

- (1) Ease of access
- (2) Non-meeting activities and attractions
- (3) Clients' stated preference

Additional considerations included conference space amenities, disability access, and of course, venue quality.

2.5 Interviews with Visitors

Interviews were designed to be administered to both business and leisure travelers. Overall, the interviews sought to gain insight on a visitor's overall experience(s) while visiting Montgomery County, MD. Topics of discussion ranged from why respondents chose to visit Montgomery County and what they did while in the county to perceptions of Montgomery County as a travel destination. A total of seven interviews were completed.

The table below shows the type of traveler who participated in the interviews as well as the area in which they stayed during their trip.

Table 32: Interviews with Visitors

Respondent	Purpose of travel	Area of stay
T1	Personal/leisure	Silver Spring
T2	Personal/leisure	Silver Spring
T3	Business	Bethesda
T4	Business	Silver Spring
T5	Business	Bethesda
T6	Business	Arlington, VA
T7	Personal/leisure	Silver Spring

2.5.1 Summary of Findings:

The findings below are based on interview participant responses. They summarize the more detailed interview responses to specific topics and questions that follow:

- Overall, respondents had a positive experience staying in Montgomery County, MD.
- The reasons visited stated for visiting Montgomery County were varied and included purposes such as travel for conferences to patronizing local retail centers.
- Online/Digital sources appeared to be an important resource in making dining and shopping decisions among interviewed visitors. Visitors seem to consider this as a vital source of information even with the availability of hotel staff and literature.
- Visitors learned of Montgomery County either through business related travel or through family and friends.
- As a result of their stay, most visitors would recommend Montgomery County as a travel destination to others.

2.5.2 Why Montgomery County

Key Takeaway(s):

- Visitors chose to stay in Montgomery County for a number of different reasons ranging from family visits to having access to a variety of different cultural activities.

Respondents chose to stay in Montgomery County, MD for a variety of reasons. With the exception of two respondents, who chose to stay in Montgomery County (Bethesda) for conferences, there was no singular reason for choosing an area in Montgomery County as their final travel destination. For example, one respondent stayed in the area in order to visit family. Another was visiting because they were already familiar with the area amenities and the restaurants. Yet another respondent had been patronizing the malls in Montgomery County for years. Finally, another respondent cited the diversity and access to different cultural activities of Silver Spring, MD as the reason for visiting.

2.5.3 Choosing Montgomery County over local competitors in DC Metro Region

Key Takeaway(s):

- For those who chose to stay in Montgomery County, no other options were considered i.e. staying in Washington, D.C.

The majority (five of seven) of the respondents did not consider staying in any other areas of the county or DC metro region. One visitor noted that they have been coming to Montgomery County since 1986 because it has everything nearby. Of the two visitors who did consider elsewhere, one considered Landover, MD and Washington, DC before selecting the Silver Spring area. The other visitor decided to stay in Arlington due to seeing a well-priced Airbnb listing at the Clarendon metro station.

2.5.4 Activities while in Montgomery County, MD

Key Takeaway(s):

- For interview participants, shopping and dining were the most common activities. The majority of visitors would recommend their activities to others.

The most common visitor activities around their accommodations were dining and shopping. All respondents utilized online resources such as Yelp or Google to identify dining locations as opposed to using hotel staff and literature. Some respondents, however, also consulted hotel staff and literature in addition to using digital sources in making their decisions.

Similarly, shoppers found their shopping locations using a combination of online resources, hotel staff and literature, as well as by simply exploring the area on their own. The two movie-going visitors also consulted online resources as opposed to hotel staff and literature.

With the exception of the one respondent who participated in no activities, all visitors said they would recommend doing what they did while in Montgomery County to another person. One even remarked that *"it's [the Silver Spring area] a beautiful place to be on vacation."* Another visitor said this was their second time visiting Bethesda and they really enjoyed both trips.

2.5.5 Experiences at local Montgomery County attractions

Key Takeaway(s):

- Visitors were unaware of attractions in Montgomery County.

The majority of respondents did not visit any attractions. However, it should be noted that respondents had a difficult time defining or conceptualizing what would be considered an attraction in Montgomery County.

2.5.6 Local Transportation (Experiences with cabs and metro)

Key Takeaway(s):

- Overall, visitors who used local transportation had relatively positive experiences in regards to safety, cleanliness, timeliness and affordability.

Roughly a third of respondents exclusively used the metro during their stay in Montgomery County. Another third used a combination of metro and cabs. Two metro-using respondents described the metro as clean, while another four described the metro as reasonably priced and safe. As one respondent simply put it

"I used Metro. It was clean, safe, and I got to my destination on time."

Only one respondent exclusively used cabs while in Montgomery County. This respondent described the experience as "bad" citing an unreasonably high priced cab fare (the respondent traveled from Reagan International Airport to a location in Bethesda)

2.5.7 The "Bests" of staying in Montgomery County, MD

Responses to this query varied. Common responses included the following:

- Cleanliness of the area
- Food options
- Locational convenience
- Kindness of residents

2.5.8 The "Worsts" of Staying in Montgomery County, MD

Key Takeaway(s):

- Visitors found little to complain about their stay in Montgomery County. Therefore, no common "worsts" were identified.

None of the respondents provided substantive comments about anything they may have disliked about their visit. In fact, one respondent commented *"I loved it all."* The only complaints were unrelated or had very little to do with services or the quality of the County itself. For example, a respondent from Hawaii complained it was too cold. The respondent who had a bad cab

experience used this question as a chance to reiterate his bad experience. However, one respondent commented that their room was a bit expensive, but since their company would be reimbursing them for it, it was not a real concern.

2.5.9 Likelihood of a return visit to Montgomery County, MD

Key Takeaway(s):

- Return trips to Montgomery County were dependent on particular circumstances for those interviewed. Nearly half of visitors' decision to return was related to business or work opportunities.

Almost half (three of seven) respondents indicated an intent to visit Montgomery County frequently. Many indicated that they would like to visit Montgomery County again. However, many admitted that their return would depend on certain circumstances. Those circumstances were often related to work and business opportunities. For example, one respondent commented that their return would depend on if there was another conference in the area. Another respondent offered that their return to Montgomery County depends on what business development opportunities they might find here. Finally, one respondent intends to visit six or more times this year, as long as their job continues to send them.

2.5.10 Likelihood of recommending Montgomery County to others

Key Takeaway(s):

- Nearly all of visitors interviewed would recommend a trip to Montgomery County to others.

Five of the seven visitors would either definitely or most likely recommend visiting Montgomery County to a relative, friend, or colleague. One visitor was uncertain about whether they would recommend Montgomery County. As they put it, "*There aren't major attractions, but it's a nice day trip.*"

2.5.11 Learning about Montgomery County

Key Takeaway(s):

- Visitors learned about Montgomery County as a travel destination through friends and family or as a result of their business travels.

Almost half of respondents (three of seven) learned about Montgomery County as a travel destination through business travel. The remainder learned of Montgomery County through friends or family.

2.5.12 Perceptions and Expectations about Montgomery County

Key Takeaway(s):

- Few visitors had preconceived ideas or expectations about their trip to Montgomery County.

Most respondents did not have any expectations of Montgomery County prior to their visit. Only two respondents expressed expectations of their experience of Montgomery County. Both expectations were positive—the first expecting cleanliness and the second expecting a good selection of venues to patronize. Both sets of expectations were met. Finally, one respondent remarked on an unexpected quality of Montgomery County offering *“[I am] surprised by the diversity that was here.”*

2.6 Surveys of visitors

Two sets of surveys were conducted with visitors to Montgomery County. The first survey was administered by Visit Montgomery and was conducted with visitors who came to the Potomac Soccer Tournament during the Memorial Day weekend. Two hundred and thirty five (235) individuals provided responses to an online survey. The second survey was an intercept survey of visitors conducted in the proximity of Bethesda, Friendship Heights/Chevy Chase and Silver Spring business areas. Sixty individuals were interviewed on June 10 and June 11th 2015 with 59 respondents providing usable data.

2.6.1 Potomac Soccer Tournament Memorial Day Weekend Results

Results of the responses to questions on the survey delivered during the Potomac Soccer Tournament are outlined below.

2.6.2 Opinions on moco-sports.com website

- More than two-thirds of all respondents (69.3%) indicated that they would rank the moco-sports.com website either "Good" or "Very good".
- Almost a quarter of all respondents (24.3%) indicated that they found the moco-sports.com website to be "Fair".
- Less than 1% of respondents found the moco-sports.com website to be either "Poor" or "Very Poor".

2.6.3 Opinions on customer service from the hotel reservation service

- Almost three-quarters of all respondents (73.4%) indicated that they would rate their experience of customer service as either "Good" or "Very good".
- Almost one-fifth of all respondents (18.8%) indicated that they would rate their experience of customer service as "Fair".
- Less than 1% (0.08%) of respondents indicated that they would rate their experience of customer service as "Poor" or "Very Poor".

2.6.4 What did respondents do: Activities near hotel

- More than eight out of ten respondents (84.9%) dined out while in the area near their hotel.
- Almost four out of ten respondents (38.5%) went shopping while in the area near their hotel.
- More than two out of ten respondents (22.9%) went to a sporting event while in the area near their hotel. However their responses may refer to the soccer tournament they attended.

2.6.5 How visitors learned about what to do: Information about activities

- More than four out of ten respondents (43.4%) indicated that they got information about the activities in which they participated through word-of-mouth.
- More than four out of ten respondents (42%) indicated that they got information about the activities through other methods.
- More than three out of ten respondents (31.2%) indicated that they received information about activities through the hotel staff/concierge.

2.6.6 How Visitors Got Around: Use of Metro

- Only 35 out of 235 survey respondents took Metro during their stay. Survey response ratings on visitor Metro experience(s) are presented Table 33.
- With the exception of cleanliness and audible stop announcements, the majority of respondents found their Metro experience to be either “Good” or “Very Good”.

Table 33 – Satisfaction with Metro

	Very poor	Poor	Fair	Good	Very good
Cleanliness	0%	3%	27%	39%	30%
Crowds	0%	0%	13%	59%	28%
Safety	0%	0%	6%	61%	32%
Timeliness	3%	0%	16%	47%	34%
Ease of purchasing fare	0%	0%	13%	58%	29%
Ease of determining where to go	0%	0%	10%	62%	28%
Audible stop announcements	13%	7%	17%	53%	10%
Timely stop announcements	7%	0%	7%	72%	14%

2.6.7 How Visitors Got Around: Use of cabs

- Only four respondents took a cab during their stay. Therefore, there is not enough data to present a statistical summary.

2.7 Intercept Survey Results

Results of the responses to questions on the intercept survey/interviews, defined as a one-on-one, impromptu survey done on location, are outlined below.

2.7.1 Reasons for Visiting

- Most visitors were in Montgomery County on business (68% vs. 32% who came for leisure/personal reasons). Few business leaders also reported site seeing as a secondary reason for their visit.
 - Responses may be due to a seasonality effect (i.e., when data were collected).
- Visitors who came for leisure/personal reasons reported visiting friends or relatives as the primary reason for visiting (72%).

2.7.2 Primary destination

Leisure/Personal visitors

- More than half (55%) of those who completed the survey reported Montgomery County as their primary destination.
- Washington DC was most frequently reported as the primary destination after Montgomery County (29%).

Business visitors

- 79% of business travelers reported Montgomery County as their primary destination.
- 21% of business travelers also mentioned Washington DC as a destination.
- 10% of business travelers also mentioned other jurisdictions in Maryland as a destination.

2.7.3 Visitors Sources of Information

Table 34 presents what sources informed visitors' decision to stay in Montgomery County.

Table 34 – Sources of Information for Decision to stay in Montgomery County

	Business Traveler	Leisure Traveler
Visit Montgomery website	13%	0
Hotel Website	10%	0
Review Website	3%	11%
Online booking engine	3%	6%
Word of mouth	37%	72%

As Table 34 demonstrates, word of mouth was the most frequent source of information for both the business and leisure traveler. Since most of the leisure visitors traveled to visit friends or relatives this not a surprising finding. The Visit Montgomery website was reported as a source of information for 13% of business travelers.

2.7.4 What did Visitors do and how did they find out about it: Activities around hotel

- Dining out (55%) and shopping (33%) were the most frequently reported activities in the areas where visitors stayed.
- Word of mouth was the most frequently reported source of information for activities around the hotel area (52%).

2.7.5 How Visitors Got Around: Use of Metro

Table 35 presents information on visitors' experience of using the Metro.

Table 35 – Satisfaction with Metro

	Very poor	Poor	Fair	Good	Very good	Don't Know
Cleanliness	9%	0%	9%	52%	26%	4%
Crowds	11%	7%	24%	39%	15%	4%
Safety	9%	9%	9%	35%	35%	4%
Timeliness	11%	7%	20%	31%	24%	7%
Ease of purchasing fare	9%	9%	13%	29%	33%	7%
Ease of determining where to go	7%	7%	22%	31%	29%	4%
Audible stop announcements	7%	7%	24%	33%	24%	4%

- The majority of respondents indicated that they found their Metro experience to be either "Good" or Very "Good".
- Crowding, ease of determining where to go and clarity of stop announcements were more likely to receive more negative ratings than other features of the metro.

3.0 Conclusions and Recommendations

- Overall, Montgomery County residents give high marks to the county as a place to live.
 - Residents are very satisfied with county services with the exception of road maintenance. However, when interpreting perceptions on aspects such as road maintenance, it is necessary to note that residents may not be aware of which roads fall under the responsibility of the different jurisdictional authorities. ◦ Residents rate quality of life aspects higher than factors pertinent to economic development. This suggests that of greatest opportunity to improve resident satisfaction is to focus on enhancing economic vitality.
- The analysis reveals that resident satisfaction with the county is driven by eight primary drivers and nine secondary drivers as documented in the study. To maximize impact on resident satisfaction, a focus on these drivers is recommended. The eight primary drivers are: a place to raise children, safety, attractive to people like me, variety of recreational opportunities, job opportunities, a place that encourages business growth, a place that regulates businesses in order to benefit the well-being of community residents, and a place that provides professional opportunities. The secondary drivers that in turn influence resident satisfaction indirectly, are: Opportunity for outdoor activities, exciting place to live, provides entrepreneurial opportunities, has a sense of community, is a progressive community, arts and culture scene, spends tax dollars well, a place that welcomes innovative people, and offers local dining options.
- Messaging to residents regarding economic prosperity of the county should be made in conjunction with communication about county vitality in retail, dining, arts and cultural attractions since these two sets of perceptions are linked with one another.
 - Analyses of secondary drivers suggest that perceptions of the county's art and culture scene, entertainment and dining options as well opportunities for outdoor activities may reinforce economic development messages. ◦ Montgomery County should publicize mixed used redevelopments and amenities they will offer (e.g., White Flint, Pike and Rose, Wheaton) to exemplify county's commitment to vibrant, exciting neighborhoods. ◦ Montgomery County should emphasize the success of past efforts, especially the secondary development (e.g., commercial development along the Georgia Ave corridor after the development of Silver Spring downtown).
- Messaging about economic development and county vitality may also alter cost-benefit analysis of some residents who are planning on moving out of the county.
 - Cost of living is a main driver for individuals planning to move for reasons other than jobs, retirement or education. However, some may be willing to pay more to live in a place that offers both job/career opportunities and the amenities they want.
- A large percentage of non-residents in the region are largely unaware of what the county has to offer. This indicates that the county can increase consideration as a place to live by generating greater awareness of key features since the general perception is already positive but lacking specific awareness on the key county attributes.
 - Those familiar with the county generally give it high ratings on most quality of life factors. ◦ Of all measured attributes, the categories of retail and dining options had more than 50% of non-residents willing to offer a rating (not selecting "Do Not Know"). Non-residents also rated positively the county as a place to raise children. This finding suggests that starting off with communications regarding

retail and dining options can be followed with other key attributes the county wishes to convey in its communications and branding effort.

- An important finding is that more than half of county residents commute within the county. It is therefore recommended that further research provide greater understanding of the needs and satisfaction of the factors influencing intra-county commuting.
- Survey results also show potential opportunities to shift behavior of some residents who currently drive toward other modes including transit, biking and walking. While the study uncovers the difference between current behavior and a higher preference for other modes, further research is warranted to explore this opportunity.

Business and site selectors

- The qualitative research of businesses offered important findings but due to its nature it does not allow for quantification overall or by segment. It is recommended that the county conduct a quantitative survey of business leaders as a separate stand-alone endeavor. This quantitative assessment of perceptions of business leaders should seek to quantify of the perceptions, issues and opportunities uncovered during this study.
- In order to better market the county to its target sectors, consider placing an emphasis on county's commitment to Health IT and Cybersecurity sectors, as these do not appear to be salient among those who we interviewed.
- Explore a differentiation effort of Montgomery County from other regional jurisdictions, essentially branding location as the national center for the targeted industries: "Place to be" for Biotech, Health IT and Cybersecurity. The presence and proximity of leaders in these sectors, as well as key federal agencies can serve to reinforce such messaging.
- Use communications to the business sector that emphasize county responsiveness to businesses and changes in business climate. More broadly to residents and to general business audiences, publicize support for small business and entrepreneurs.
- The study uncovered key processes followed by site selection consultants regarding where to locate a business, where initial narrowing of alternatives occurs considering state-level variables. In order to partially pre-empt and place the county in a more favorable market position, distinctly branding of the county as a preferred location is recommended.
- As the county develops a concerted branding plan, develop talking points for county leaders to emphasize the key branding messages.

Visitors

- Meeting planners play an important role in attracting business visitors to the county. The findings reveal that while there is general unawareness of the positive aspect the county has to offer among this group of influencers, those who are local are willing to play a role of advocacy among their peers. This offers two important possible avenues for increasing meetings in the county: A recommendation to generate greater awareness of the county as a meeting destination, and efforts to enroll greater involvement of local meeting planners to seek their advocacy role with their professional peers.
- Excluding those visiting for special events, visitors learn of Montgomery County either through business related travel or through family and friends. Marketing to visitors during their stay using online/digital sources appears to be an important resource in the making dining and shopping decisions.

Appendix A - Tabulations – Full Sample

PART I: Quality of Life	Total Responses	Mean Rating	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
1. Montgomery County, MD is an attractive place for people like me	1,178	4.00	2.0%	4.1%	13.9%	52.0%	28.1%
2. Montgomery County, MD has a sense of community	1,169	3.63	2.6%	9.3%	24.9%	48.6%	14.6%
3. In Montgomery County, MD, there are places to meet people like me	1,171	3.67	1.9%	10.0%	23.4%	48.3%	16.4%
4. Montgomery County, MD is a progressive community	1,169	3.76	1.5%	6.9%	23.3%	50.2%	18.1%
5. Montgomery County, MD is an exciting place to live	1,176	3.83	1.7%	7.3%	20.7%	47.6%	22.8%
6. Montgomery County, MD is a place that welcomes diversity	1,165	3.63	3.3%	7.8%	28.5%	42.9%	17.4%
7. Overall, I feel my tax dollars are well spent in Montgomery County, MD	1,169	3.39	7.0%	11.3%	29.3%	40.1%	12.3%
PART II: Business and Professional Environment	Total Responses	Mean Rating	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
8. Montgomery County, MD is a place that welcomes innovative people	1,172	3.75	2.4%	5.3%	26.8%	45.4%	20.1%
9. Montgomery County, MD is a place that provides professional opportunities	1,169	3.46	4.7%	9.0%	33.7%	41.1%	11.4%
10. Montgomery County, MD is a place that provides entrepreneurial opportunities	1,168	3.46	3.4%	11.9%	33.0%	39.2%	12.6%
11. Montgomery County, MD has a competitive business environment	1,161	3.87	1.6%	5.2%	23.2%	44.4%	25.6%
12. Montgomery County, MD regulates businesses in order to benefit the well-being of community residents	1,166	3.15	9.2%	15.4%	36.3%	29.5%	9.5%

PART III. Other Considerations	Total Responses	Mean Rating*	Poor	Fair	Good	Very Good	Excellent	Don't Know
13. Job Opportunities	1,164	3.65	2.3%	7.2%	25.6%	36.5%	15.9%	12.5%
14. Cost of living	1,165	3.89	6.4%	13.8%	12.8%	16.0%	48.9%	2.1%
15. Local dining options	1,160	4.02	1.8%	4.8%	18.4%	37.8%	35.1%	2.2%
16. Place to raise children	1,159	4.22	1.6%	4.1%	11.3%	30.6%	44.8%	7.6%
17. Safety	1,159	3.90	1.4%	5.3%	19.4%	47.3%	24.3%	2.3%
18. Opportunities for outdoor activities	1,158	3.99	1.4%	3.8%	21.0%	38.4%	32.0%	3.4%
19. Local retail shopping	1,141	4.03	1.1%	3.5%	21.3%	38.1%	34.3%	1.7%
20. Racial and ethnic diversity	1,134	4.03	1.7%	3.2%	18.8%	39.4%	33.2%	3.7%
21. Availability of quality medical services	1,145	4.28	0.8%	2.0%	11.5%	36.8%	44.3%	4.6%
22. Public Transportation	1,128	3.61	4.8%	7.2%	28.0%	33.6%	19.9%	6.6%
23. Variety of recreational services	1,129	3.92	1.6%	2.9%	22.2%	42.6%	24.9%	5.9%
24. Entertainment options	1,133	3.65	2.6%	8.1%	29.4%	37.4%	19.2%	3.3%
25. Arts and culture scene	1,112	3.56	2.7%	8.5%	30.7%	35.6%	15.3%	7.2%
26. Traffic congestion	1,115	2.06	34.9%	32.3%	21.9%	7.0%	1.8%	2.1%
27. Access to parks and green spaces	1,117	3.93	1.2%	5.4%	21.4%	39.8%	29.4%	2.8%
28. Encourages business growth	1,114	3.06	10.0%	8.0%	17.9%	16.7%	7.5%	39.9%
29. Encourages environmental sustainability and protection	1,115	3.78	3.0%	5.7%	21.7%	33.5%	23.0%	13.0%

* Exclude "Don't Know".

Overall Rating a place to live	Total Responses	Mean Rating*	Poor	Fair	Good	Very Good	Excellent	Don't Know
30. Overall, how do you rate Montgomery County, MD as a place to live?	1,052	3.95	1.6%	5.2%	19.8%	42.6%	30.4%	0.4%

* Exclude "Don't Know".

Q31. Services	Total Responses	Mean Rating*	Poor	Fair	Good	Very Good	Excellent	Don't Know
Trash Collection	1,116	4.03	1.7%	3.6%	18.3%	34.6%	33.4%	8.4%
Road Maintenance	1,100	3.02	10.4%	16.2%	40.6%	24.6%	7.2%	1.1%
Emergency Services	1,100	3.97	0.9%	2.6%	18.4%	35.4%	23.6%	19.1%
Recycling	1,098	4.05	2.4%	2.7%	18.2%	36.5%	35.4%	4.8%

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Law Enforcement	1,102	3.81	2.6%	5.2%	20.7%	39.9%	21.8%	9.7%
Snow Removal	1,097	3.50	5.2%	9.8%	29.8%	37.7%	15.9%	1.7%

* Exclude "Don't Know".

		Count	Column N %
32. Where were you born?	In the US, in Montgomery County, MD	130	11.8%
	In the US, in DC Metro region, other than Montgomery County, MD	172	15.5%
	In the US, in Virginia, other than the DC Metro region	16	1.4%
	In the US, in Maryland, outside of the DC Metro region	34	3.0%
	In the US, Other	459	41.4%
	Outside of the US	298	26.9%
	Total	1,108	100.0%
33. How long have you lived in Montgomery County, MD?	0 - 2 years	70	6.8%
	3 - 5 years	124	11.9%
	6 - 9 years	91	8.8%
	10 - 14 years	114	11.0%
	15 - 20 years	106	10.2%
	20+ years	531	51.2%
	Total	1,036	100.0%
34. Have you lived anywhere other than Montgomery County, MD?	Yes	948	85.8%
	No	157	14.2%
	Total	1,105	100.0%

35. If yes, where did you live previously?		Count	Column N %
Alexandria/Arlington VA	Selected	25	3.7%
	Not Selected	656	96.3%
	Total	680	100.0%

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35. If yes, where did you live previously?		Count	Column N %
District of Columbia	Selected	159	21.0%
	Not Selected	595	79.0%
	Total	754	100.0%
Fairfax County/Falls Church VA	Selected	152	22.2%
	Not Selected	532	77.8%
	Total	684	100.0%
Frederick, MD	Selected	54	8.2%
	Not Selected	605	91.8%
	Total	659	100.0%
Howard County, MD	Selected	31	4.7%
	Not Selected	634	95.3%
	Total	666	100.0%
Loudon County	Selected	38	5.7%
	Not Selected	620	94.3%
	Total	657	100.0%
Prince George's County, MD	Selected	48	6.9%
	Not Selected	649	93.1%
	Total	697	100.0%
Somewhere else in MD	Selected	118	17.3%
	Not Selected	564	82.7%
	Total	682	100.0%
Somewhere else in VA	Selected	102	15.1%
	Not Selected	574	84.9%
	Total	676	100.0%
Some other state (please specify)	Selected	620	75.8%
	Not Selected	198	24.2%

35. If yes, where did you live previously?		Count	Column N %
	Total	818	100.0%
Outside of United States	Selected	193	27.5%
	Not Selected	510	72.5%
	Total	703	100.0%

32a. If you were born outside of the US, how long have you resided in the United States?		Count	Column N %
	0 - 2 years	5	.7%
	3 - 5 years	16	2.0%
	6 - 9 years	20	2.5%
	10 - 14 years	40	5.0%
	15 - 20 years	36	4.4%
	20+ years	683	85.4%
	Total	799	100.0%

36. What is your age?		Count	Column N %
	18 - 24	108	9.8%
	25 - 34	196	17.7%
	35 - 44	200	18.0%
	45 - 54	220	19.9%
	55 - 64	190	17.1%
	65+	193	17.5%
	Total	1,107	100.0%
37. What is your gender?			
	Female	578	52.1%
	Male	532	47.9%
	Total	1,110	100.0%
	Live Alone	196	17.7%

		Count	Column N %
38. What is your current living arrangement?	Live with spouse or partner	454	40.9%
	Live with family	394	35.5%
	Live with roommates, non-related	47	4.2%
	Other	19	1.7%
	Total	1,110	100.0%
39. Do you have children under 18 living with you?	Yes	323	33.0%
	No	655	67.0%
	Total	979	100.0%
40. Do you currently own or rent your home?	Rent	256	23.0%
	Own	795	71.4%
	Something else	62	5.6%
	Total	1,113	100.0%
41. Where do you currently work?		Count	Column N %
Montgomery County, MD	Selected	519	43.9%
	Not Selected	664	56.1%
	Total	1,184	100.0%
Alexandria/Arlington VA	Selected	44	3.7%
	Not Selected	1,140	96.3%
	Total	1,184	100.0%
District of Columbia	Selected	194	16.4%
	Not Selected	990	83.6%
	Total	1,184	100.0%
Fairfax County/Falls Church VA	Selected	27	2.3%
	Not Selected	1,157	97.7%
	Total	1,184	100.0%
	Selected	12	1.1%

41. Where do you currently work?		Count	Column N %
Frederick, MD	Not Selected	1,171	98.9%
	Total	1,184	100.0%
Howard County, MD	Selected	13	1.1%
	Not Selected	1,171	98.9%
	Total	1,184	100.0%
Loudon County, VA	Selected	5	0.4%
	Not Selected	1,178	99.6%
	Total	1,184	100.0%
Prince George's County, MD	Selected	41	3.4%
	Not Selected	1,143	96.6%
	Total	1,184	100.0%
Somewhere else in MD	Selected	24	2.1%
	Not Selected	1,159	97.9%
	Total	1,184	100.0%
Somewhere else in VA	Selected	43	3.6%
	Not Selected	1,141	96.4%
	Total	1,184	100.0%
Some other state	Selected	22	1.8%
	Not Selected	1,162	98.2%
	Total	1,184	100.0%
Not applicable/unemployed/in between jobs	Selected	215	18.1%
	Not Selected	969	81.9%
	Total	1,184	100.0%

42. How do you currently commute to work?		Count	Column N %
Drive/Carpool	Selected	737	65.4%
	Not Selected	391	34.6%

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	Total	1,128	100.0%
Walk	Selected	59	5.2%
	Not Selected	1,069	94.8%
	Total	1,128	100.0%
Bike	Selected	13	1.1%
	Not Selected	1,115	98.9%
	Total	1,128	100.0%
Public transportation (Metrorail, bus)	Selected	169	15.0%
	Not Selected	958	85.0%
	Total	1,128	100.0%

		Count	Column N %
43. How would you prefer to commute to work?	Drive	567	59.7%
	Walk	112	11.8%
	Bike	54	5.6%
	Public transportation (Metrorail, bus)	218	22.9%
	Total	951	100.0%
44. What is the average length of your current commute?	Less than 15 minutes	213	23.0%
	16 - 30 minutes	295	31.9%
	31 - 45 minutes	161	17.4%
	46 minutes to 1 hour	164	17.7%
	Over 1 hour	92	10.0%
	Total	925	100.0%
45. Do you own a car?	Yes	976	91.3%
	No	93	8.7%
	Total	1,069	100.0%

		Count	Column N %
	Under \$50,000	159	15.1%

	\$50,000 - \$74,999	185	17.5%
	\$75,000 - \$99,999	171	16.2%
46. Please estimate your household income (income earned by all members living at this address):	\$100,000 - \$150,000	219	20.8%
	\$150,000 - \$200,000	156	14.8%
	\$200,000 - \$250,000	85	8.0%
	Over \$250,000	79	7.5%
	Total	1,053	100.0%
	Less than High School	26	2.3%
	High School graduate	70	6.3%
	Associate's Degree	95	8.6%
47. What is the highest level of education that	Some college	77	7.0%
	Bachelor's Degree	321	29.0%
	Graduate or professional degree	517	46.7%
	Total	1,106	100.0%
48. Are you of Hispanic, Latino, or Spanish origin?	Yes	179	16.4%
	No	913	83.6%
	Total	1,092	100.0%

49. What of the following best describes your race?		Count	Column N %
White	Selected	742	65.9%
	Not Selected	385	34.1%
	Total	1,127	100.0%
Black or African American	Selected	112	9.9%
	Not Selected	1,015	90.1%
	Total	1,127	100.0%
American Indian or Alaska Native	Selected	12	1.0%
	Not Selected	1,115	99.0%
	Total	1,127	100.0%
Asian	Selected	174	15.5%
	Not Selected	952	84.5%

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	Total	1,127	100.0%
Native Hawaiian or Other Pacific Islander	Selected	10	0.9%
	Not Selected	1,116	99.1%
	Total	1,127	100.0%
Other	Selected	89	7.9%
	Not Selected	1,037	92.1%
	Total	1,127	100.0%

		Count	Column N %
50. Do you intend to move in the next year?	Yes	247	22.4%
	No	859	77.6%
	Total	1,107	100.0%

50_IF. If yes, for which of the following reasons		Count	Column N %
Job	Selected	68	11.8%
	Not Selected	513	88.2%
	Total	581	100.0%
School/Education	Selected	11	1.9%
	Not Selected	570	98.1%
	Total	581	100.0%
Quality of Life	Selected	57	9.8%
	Not Selected	524	90.2%
	Total	581	100.0%
Retirement	Selected	20	3.4%
	Not Selected	562	96.6%
	Total	581	100.0%
Bigger House/Property	Selected	59	10.1%
	Not Selected	522	89.9%
	Total	581	100.0%

50_IF. If yes, for which of the following reasons		Count	Column N %
Taxes	Selected	37	6.4%
	Not Selected	544	93.6%
	Total	581	100.0%
Cost of Living	Selected	71	12.2%
	Not Selected	510	87.8%
	Total	581	100.0%
Other	Selected	64	11.0%
	Not Selected	517	89.0%
	Total	581	100.0%

Appendix B - Tabulations – Millennium Sample

PART I: Quality of Life	Total Responses	Mean Rating	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
1. Montgomery County, MD is an attractive place for people like me	302	3.98	2%	3%	17%	52%	26%
2. Montgomery County, MD has a sense of community	302	3.67	4%	5%	25%	51%	15%
3. In Montgomery County, MD, there are places to meet people like me	304	3.58	2%	16%	21%	45%	17%
4. Montgomery County, MD is a progressive community	302	3.72	0%	7%	29%	48%	15%
5. Montgomery County, MD is an exciting place to live	304	3.89	0%	10%	16%	48%	26%
6. Montgomery County, MD is a place that welcomes diversity	304	3.71	2%	4%	35%	40%	19%
7. Overall, I feel my tax dollars are well spent in Montgomery County, MD	303	3.55	5%	7%	30%	41%	16%

PART II: Business and Professional Environment	Total Responses	Mean Rating	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
8. Montgomery County, MD is a place that welcomes innovative people	302	3.80	2%	4%	27%	44%	22%
9. Montgomery County, MD is a place that provides professional opportunities	302	3.57	3%	8%	33%	41%	15%
10. Montgomery County, MD is a place that provides entrepreneurial opportunities	302	3.46	2%	16%	31%	35%	16%

11. Montgomery County, MD has a competitive business environment	296	4.02	1%	4%	20%	45%	31%
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12. Montgomery County, MD regulates businesses in order to benefit the well-being of community residents	304	3.16	6%	14%	45%	24%	9%
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PART III. Other Considerations	Total Responses	Mean Rating*	Poor	Fair	Good	Very Good	Excellent	Don't Know
13. Job Opportunities	302	3.77	1%	4%	26%	48%	14%	8%
14. Cost of living	295	3.96	6%	9%	15%	21%	47%	3%
15. Local dining options	295	4.05	2%	3%	18%	41%	34%	3%
16. Place to raise children	304	4.26	1%	8%	6%	25%	49%	11%
17. Safety	304	4.01	1%	5%	13%	51%	27%	3%
18. Opportunities for outdoor activities	304	3.93	2%	3%	28%	32%	31%	5%
19. Local retail shopping	302	4.07	1%	2%	23%	36%	36%	3%
20. Racial and ethnic diversity	299	3.92	2%	5%	18%	44%	27%	5%
21. Availability of quality medical services	304	4.31	1%	0%	9%	37%	39%	13%
22. Public Transportation	294	3.58	4%	7%	32%	34%	17%	6%
23. Variety of recreational services	297	3.89	2%	2%	22%	42%	21%	12%
24. Entertainment options	297	3.65	4%	9%	28%	31%	24%	5%
25. Arts and culture scene	295	3.54	3%	10%	25%	38%	13%	11%
26. Traffic congestion	295	2.17	32%	25%	31%	7%	1%	3%
27. Access to parks and green spaces	297	3.97	1%	4%	18%	45%	27%	5%

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28. Encourages business growth	302	3.37	5%	5%	11%	18%	7%	54%
29. Encourages environmental sustainability and protection	304	3.84	4%	4%	19%	28%	26%	19%

* Excludes "Don't Know".

Overall Rating a place to live	Total Responses	Mean Rating*	Poor	Fair	Good	Very Good	Excellent	Don't Know
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30. Overall, how do you rate Montgomery County, MD as a place to live?	281	3.98	1%	4%	20%	45%	29%	0%
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* Exclude "Don't Know".

Overall Rating a place to live	Total Responses	Mean Rating*	Poor	Fair	Good	Very Good	Excellent	Don't Know
Trash Collection	304	4.05	1%	4%	19%	30%	36%	9%
Road Maintenance	297	3.04	12%	13%	44%	22%	9%	0%
Emergency Services	297	4.01	1%	2%	11%	34%	18%	34%
Recycling	297	4.14	3%	1%	15%	36%	38%	7%
Law Enforcement	297	3.80	1%	7%	14%	40%	17%	20%
Snow Removal	296	3.51	4%	12%	30%	39%	16%	0%

Appendix C - Business Leaders IN County - Qualitative Protocol

(Business IN Montgomery County, MD)

Record name, date and time _____

Introduction:

Hello, my name is <insert name>. It's nice to meet you and thank you very much for taking the time to participate in this interview.

Our conversation today will focus on your decision making process to locate in Montgomery County and possible future considerations for where you may expand or relocate a business. In other words, we want to know some of the key factors or issues you consider when making your decisions regarding the location of your business. We want to know about your experience in general but also, more specifically, how it relates to Montgomery County, MD as a business location.

I'd like you to know that your comments are confidential. While they may be used in our final report, you will not be individually identified by name.

Your insights will be helpful to key stakeholders in Montgomery County, MD in making decisions on how to make Montgomery County, MD a better and more competitive place for business.

This interview will take approximately 30-45 minutes. The questions require you to provide a rating of some dimension or factor on a scale from Excellent to Poor. After you have made your selection, I will ask you to tell me about the reason(s) you made that selection. Do you have any questions before we begin?

If it's all right with you, may I record this interview for note-taking purposes?

First, I need to begin with a couple of general questions to capture some demographic information.

1. Please briefly describe the type of industry in which you work.

2. Across all of your locations, how many employees does the company currently have? Provide an estimate. Less than 50, 50-100, 100+

- 2a. How many are employed in Montgomery County, MD? Provide an estimate. Less than 50, 50-100, 100+

3. How long has this business been operating?

The following questions ask you to think about Montgomery County as a business location.

4. What is your general impression of Montgomery County as a place for doing business?

5. How would you rate Montgomery County in terms of the **availability of business space**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Availability of Business Space					
Explanation: Please explain your selection.					
Interviewer note: probe about whether or not it is a cost issue or type of business space issue.					

6. How would you rate Montgomery County in terms of the overall **cost of doing business**? This includes things such as taxes and fees, leasing costs, etc.

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Cost of doing business					
Explanation: Please explain your selection.					

Interviewer note: probe about other costs, such as cost of living and salaries.
--

7. Now I want to ask more specifically about taxes and fees. How would you rate Montgomery County in terms of **taxes and fees** (state and county)?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Taxes					
Explanation: Please explain your selection.					

8. Now I want to ask more specifically about leasing costs. How would you rate Montgomery County in terms of **leasing costs**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Rent or Leasing Costs					
Explanation: Please explain your selection.					

9. How would you rate Montgomery County in terms of its **communication infrastructure** (i.e. reliability, availability and cost of high speed internet)?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Communication infrastructure (i.e. high speed internet)					
Explanation: Please explain your selection.					

Interviewer Note: probe about data storage, back end support for businesses, data centers, and reliability, availability and cost of high speed internet.

10. How would you rate Montgomery County in terms of **quality of life**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Quality of Life (i.e. schools, crime/crime rate, recreation, public services)					
Explanation: Please explain your selection.					
Interviewer Note: probe specifically about public education (K-12), housing options and public services as a quality of life factors.					

11. How would you rate Montgomery County in terms of the **availability of qualified workforce** for your industry?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Availability of Workforce					
Explanation: Please explain your selection.					

12. How would you rate Montgomery County in terms of **proximity to your clients, customers, etc.?**

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Proximity to clients					

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Access to public transportation					
Explanation: Please explain your selection.					

16. How would you rate Montgomery County in terms of the **business regulatory environment**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Access to public transportation					
Explanation: Please explain your selection.					

17. How would you rate Montgomery County in terms of the **possibility for expanding your business or retaining it in the County**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Possibility for expansion					
Explanation: Please explain your selection.					

We previously discussed a number of potential factors that may inform your decision to move your business' location or in selecting an expansion site. We would now like to ask additional questions about your potential thought process in choosing a new location, relocating or expanding your business

18. If you had to select the top three factors you consider when making a business (re)location decision, what would those be and why? Note, these can include items we have already discussed or be something different.

19. In what ways did or does Montgomery County's reputation inform your decision making process when selecting a new location for or expanding your business within Montgomery County?

20. Are there any absolute barriers that would prevent you from considering Montgomery County as a location for expanding your business or any concerns that you have about retaining your business in Montgomery County? If so, what are they?

21. Are there any criteria or factors that must be met before considering Montgomery County as a site for expanding your business or to retain your business in Montgomery County?

22. Who do you work with when considering choosing a new location, relocating or expanding your business?

23. What publications/resources do you access in making your decision for a new location, relocating or expanding your business?

It was a great interview. I enjoyed talking with you and appreciate your time and insights.
Thank you!

Appendix D - Business Leaders OUTSIDE Qualitative Protocol (Business OUTSIDE of Montgomery County, MD)

Record name, date and time: _____

Introduction:

Hello, my name is <insert name>. It's nice to meet you and thank you very much for taking the time to participate in this interview.

Our conversation today will focus on your decision making process about where to locate or where you make consider relocating a business. In other words, we want to know some of the key factors or issues you consider when making your decisions regarding the location of your business. We want to know about your experience in general but also, more specifically, how it relates to Montgomery County, MD as a potential business location.

I'd like you to know that your comments are confidential. While they may be used in our final report, you will not be individually identified by name.

Your insights will be helpful to key stakeholders in Montgomery County, MD in making decisions on how to make Montgomery County, MD a better and more competitive place for business.

This interview will take approximately 30-45 minutes. The questions require you to provide a rating of some dimension or factor on a scale from Excellent to Poor. After you have made your selection, I will ask you to tell me about the reason(s) you made that selection. Do you have any questions before we begin?

If it's all right with you, may I record this interview for note-taking purposes?

First, I need to begin with a couple of general questions to capture some demographic information.

1. Please briefly describe the type of industry in which you work.

2. Across all of your locations, how many employees does the company currently have? Provide an estimate. Less than 50, 50-100, 100+

- 2a. How many are employed in Montgomery County, MD? Provide an estimate. Less than 50, 50-100, 100+

3. How long has this business been operating?

The following questions ask you to consider Montgomery County as business location.

4. What is your general impression of Montgomery County as a place for doing business?

5. How would you rate Montgomery County in terms of the **availability of business space**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Availability of Business Space					
Explanation: Please explain your selection.					
Interviewer note: probe about whether or not it is a cost issue or type of business space issue.					

6. How would you rate Montgomery County in terms of the overall **cost of doing business**? This includes things such as taxes and fees, leasing costs, etc.

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Cost of doing business					
Explanation: Please explain your selection.					
Interviewer note: probe about other costs, such as cost of living and salaries.					

7. Now I want to ask more specifically about taxes and fees. How would you rate Montgomery County in terms of **taxes and fees** (state and county)?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Taxes					

Explanation: Please explain your selection.

8. Now I want to ask more specifically about leasing costs. How would you rate Montgomery County in terms of **leasing costs**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Rent or Leasing Costs					

Explanation: Please explain your selection.

9. How would you rate Montgomery County in terms of its **communication infrastructure** (i.e. reliability, availability and cost of high speed internet)?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Communication infrastructure (i.e. high speed internet)					

Explanation: Please explain your selection.

Interviewer Note: probe about data storage, back end support for businesses, data centers, and reliability, availability and cost of high speed internet

10. How would you rate Montgomery County in terms of **quality of life**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Quality of Life (i.e. schools, crime/crime rate, recreation, public services)					
Explanation: Please explain your selection.					
Interviewer Note: probe specifically about public education (K-12), housing options and public services as a quality of life factors.					

11. How would you rate Montgomery County in terms of the **availability of qualified workforce** for your industry?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Availability of Workforce					
Explanation: Please explain your selection.					

12. How would you rate Montgomery County in terms of **proximity to your clients, customers, etc.?**

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Proximity to clients					
Explanation: Please explain your selection.					
Interviewer Note: Probe on what respondent means by proximity i.e. Is it important to be in the same city or region as your clients? Is it important that it be easy to fly your					

client's location for meetings, etc.?

13. Overall, how would you rate Montgomery County's business climate in comparison to other jurisdictions in the DC metro region?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Business Climate					

Explanation: Please explain your selection.

Interviewer Note: Listen 1) for awareness of Montgomery County's programs to support innovation, small business and entrepreneurship. 2) for the value (if any) respondents place on such programs.

14. How would you rate Montgomery County in terms of **transportation and ease of moving around the area** (i.e. access to highways and airports, traffic congestion)?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Transportation					

Explanation: Please explain your selection.

15. How would you rate Montgomery County in terms of **access to public transportation** (Metrorail, Metrobus)?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Access to public transportation					

Explanation: Please explain your selection.

16. How would you rate Montgomery County in terms of the **business regulatory environment**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Access to public transportation					
Explanation: Please explain your selection.					

17. How would you rate Montgomery County in terms of the **possibility for expansion or relocation**?

Characteristic	Excellent	Good	Fair	Poor	Don't Know
Possibility for expansion					
Explanation: Please explain your selection.					

18. We have identified a number of potential factors that may inform your decision to move, if you had to select the top three factors you consider when making a business (re)location decision, what would those be and why? Note, these can include items we have already discussed or be something different.

19. In what ways does Montgomery County's reputation inform your decision making process?

20. Are there any absolute barriers that would prevent you from considering Montgomery County as a business location site? If so, what are those barriers?

21. Are there any criteria or factors that must be met before considering Montgomery County as a site for your business?

22. Who do you work with when considering choosing a new location or relocating?

23. What publications/resources do you access in making your decision?

It was a great interview. I enjoyed talking with you and appreciate your time and insights.
Thank you!

Appendix E - Meeting Planners Qualitative Protocol

Record name, date and time _____

Introduction:

Montgomery County, Maryland as a potential site.

Hello, my name is <insert name>. It's nice to meet you and thank you very much for taking the time to participate in this interview.

Our conversation today will focus on your decision making process in determining or selecting a meeting planning site or venue. In other words, we want to know some of the 98 key factors or issues you consider when selecting locations for meetings. We want to know about your experience in general but also, more specifically, how it relates to Montgomery County, MD as a potential business location

Questions:

1. Have you organized a meeting in Montgomery County before?
 - 1a. *If yes, ask questions about their experience of planning the meeting? For those who have planned a meeting in Montgomery County, what was the range of the meeting size? What do you think is the largest meeting that Montgomery County can accommodate?*

- 1b. *If no, have you considered Montgomery County as a meeting site location? Why or why not?*

2. What do you think are some of the advantages of having a meeting or conference in Montgomery County?

- Probes: airport access, proximity to D.C., metro access, meeting venues reputation of Montgomery County as a meeting venue

3. What do you think are some of the disadvantages of having a meeting or conference in Montgomery County?

4. Tell me what most influenced your decision to select Montgomery County for your meeting.

5. How would you compare Montgomery County as a meeting destination to other places like D.C., Northern Virginia or other destinations?

6. What are the main factors you consider when deciding on the jurisdictions in which to hold your meetings/events?

Appendix F - Site Selectors Qualitative Protocol

Introduction:

Hello, my name is <insert name>. It's nice to meet you and thank you very much for taking the time to participate in this interview.

Our conversation today will focus on your decision making process in determining or recommending an area as a business location. In other words, we want to know some of the key factors or issues you consider when making your recommendations. We want to know about your experience in general but also, more specifically, how it relates to Montgomery County, MD as a potential business location.

I'd like you to know that your comments are confidential. While they may be used in our final report, you will not be individually identified by name.

Your insights will be helpful to key stakeholders in Montgomery County, MD in making decisions on how to make Montgomery County, MD a better and more competitive place for business.

This interview will take approximately 30-45 minutes. Do you have any questions before we begin?

If it's all right with you, may I record this interview for note-taking purposes?

Questions:

1. What has been your professional interaction with Montgomery County?
Probe: who, or what office did you communicate with? What were your impressions of those communications?

2. Have you recommended Montgomery County as a business (re)location site? Why or Why not?

3. What are the key factors in providing advice on where a business should (re)locate?

Interviewer Note: Listen for the role incentives may play in this. Probe if necessary.

4. How does Montgomery County meet or fail to meet those criteria?

Interviewer note: record key factors and follow up as probes

5. In comparison to other jurisdictions in the DC metro area, how does Montgomery County rate on those factors?

6. Are there particular industries, services, or types of organizations that you think fit well with Montgomery County?

7. Which geographic areas do you consider to be Montgomery County, MD's top competitors? Why?

Interviewer Note: If all responses domestic, probe about international competitors.

8. Which other areas in the DC metro region have you recommended, if any, and why?

9. What experiences have made working with a particular jurisdiction easy or difficult/Have there been any experiences that have made working with a particular jurisdiction particularly easy or difficult to work with?

10. What sources of information are you using in making your decisions about recommendations? /Can you tell me about the sources of information you use to base your location recommendations?

Appendix G - Visitors Qualitative Protocol

Introduction:

Hello, my name is <insert name>. It's nice to meet you and thank you very much for taking the time to participate in this interview.

Our conversation today will focus on your experience visiting Montgomery County, Maryland. We'll talk about a range of topics such as what you did while you were here and your experiences with getting around the area.

I'd like you to know that your comments are confidential. While they may be used in our final report, you will not be individually identified by name.

Your insights will be helpful to key stakeholders in Montgomery County, Maryland in making decisions on how to make Montgomery County, Maryland a better place to visit.

This interview will take approximately 20-30 minutes. Do you have any questions before we begin?

If it's all right with you, may I record this interview for note-taking purposes?

Questions (follow-up to quantitative survey):

1. Was the primary purpose of you travel business related or for leisure/personal reasons?

2. In which area of Montgomery County did you stay? (If necessary, probe with areas such as Bethesda, Silver Spring, Chevy Chase, Gaithersburg, and Rockville)?

3. Why did you choose to stay in the particular area of Montgomery County you selected?

4. What, if any, other areas of the county did you consider staying in? What, if any, other parts of the DC metro region did you consider staying in? Why did you decide not to stay in those areas?

5. Did you do any of the following activities around your hotel? Why or why not?

- Probes: shop, dine, go to movies, attend an arts or cultural event, go to a park

5a. How did you find out where to go or what to do?

- Probes: hotel front desk, online

5b. What, if any, recommendations did your hotel provide? Was it a concierge or other hotel staff, or brochures, literature, etc. that you picked up at the hotel?

- *If yes to any of the probes, take note and ask about their experience of the place.*

5c. Would you recommend doing what you did to another person? Why or why not?

6. Did you visit any attractions while in Montgomery County? Where did you go? Tell me about your experience there.

7. Did you use cab or metro to get around the area? Tell us about your experience.

- Probes: *If cab*, ask questions about cost (was cost reasonable) , friendly/courteous driver, informative driver, was cab easy to hail
- Probes: *If metro*, ask to tell about experience using metro and ask questions about ease of metro use (was it easy to purchase a fare card , was it easy to figure out where to go, were stops announced) cleanliness, crowds, safety, timeliness

8. What did you like the best about your stay?

9. What did you like the least about your stay?

10. How likely are you to visit Montgomery County again? What factors will your return visit depend on?

11. How likely would you be to recommend a relative, friend or colleague to visit Montgomery County, and what would it depend on? (if appropriate, reiterate comments about recommending someone do what the respondent did during the visit)

12. How did you learn about Montgomery County as a travel destination?

13. What, if any, perceptions or expectations did you have about your visit to Montgomery County? How did you form those perceptions or expectations? Did the time you spent in Montgomery County meet those expectations? Why or why not?

14. Is there anything else about your visit to Montgomery County that you think we should know that I didn't cover in our conversation? If so, what?

It was a great interview. I enjoyed talking with you and appreciate your time and insights.

Thank you!