THE NCS™

The National Community Survey™

Montgomery County, MD
Community Livability Report

2019

NRC
National Research Center Inc.

ICMA
Leaders at the Core of Better Communities

Contents

About

The National Community Survey™ (The NCS™) report is about the "livability" of Montgomery County. The phrase "livable community" is used here to evoke a place that is not simply habitable, but that is desirable. It is not only where people do live, but where they want to live.

Great communities are partnerships of the government, private sector, community-based organizations and residents, all geographically connected. The NCS captures residents' opinions within the three pillars of a community (Community Characteristics, Governance and Participation) across eight central facets of community (Safety, Mobility, Natural Environment, Built Environment, Economy, Recreation and Wellness, Education and Enrichment and Community Engagement).

The Community Livability Report provides the opinions of a representative sample of 954 residents of Montgomery County. The margin of error around any reported percentage is 3% for all respondents. The full description of methods used to garner these opinions can be found in the *Technical Appendices* provided under separate cover.

Residents

Private sector

Communities are partnerships among…

Community-based organizations

Government

Quality of Life in Montgomery County

A majority of residents rated the quality of life in Montgomery County as excellent or good. This was similar to the national benchmark comparison (see Appendix B of the *Technical Appendices* provided under separate cover).

Overall Quality of Life

- Excellent 31%
- Good 54%
- Fair 13%
- Poor 2%
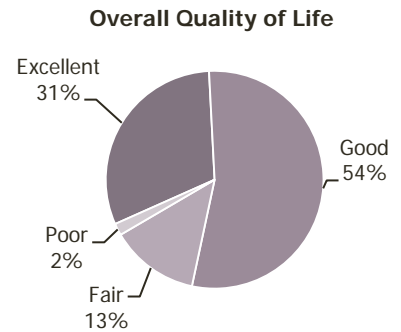
Shown below are the eight facets of community. The color of each community facet summarizes how residents rated it across the three sections of the survey that represent the pillars of a community – Community Characteristics, Governance and Participation. When most ratings across the three pillars were higher than the benchmark, the color for that facet is the darkest shade; when most ratings were lower than the benchmark, the color is the lightest shade. A mix of ratings (higher and lower than the benchmark) results in a color between the extremes.
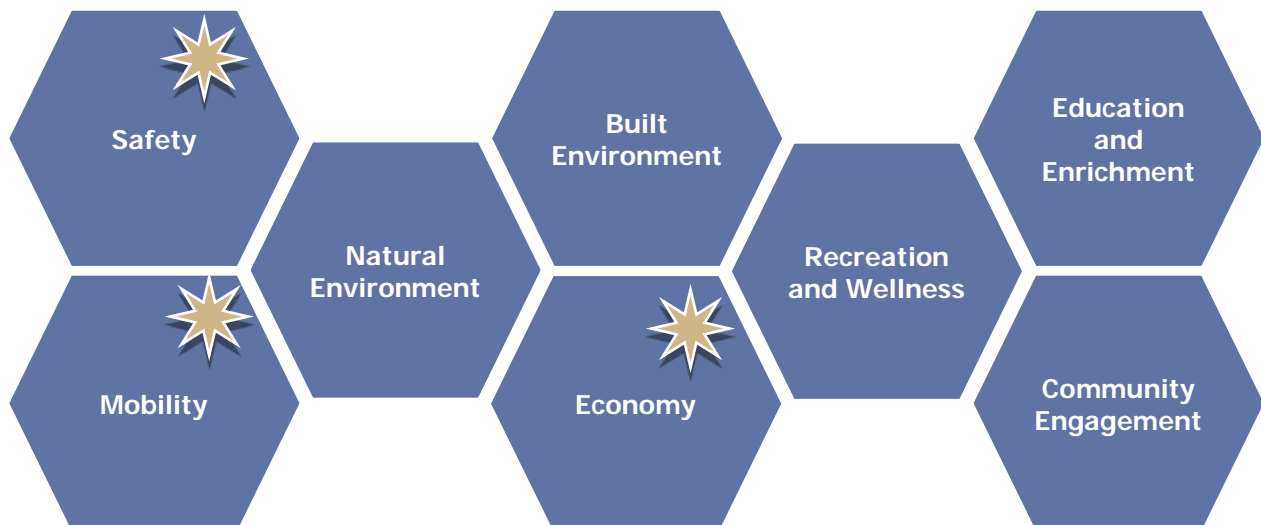
In addition to a summary of ratings, the image below includes one or more stars to indicate which community facets were the most important focus areas for the community. Residents identified Safety, Mobility and Economy as priorities for the Montgomery County community in the coming two years. Ratings across all facets tended to be positive and similar to the national benchmarks. This overview of the key aspects of community quality provides a quick summary of where residents see exceptionally strong performance and where performance offers the greatest opportunity for improvement. Linking quality to importance offers community members and leaders a view into the characteristics of the community that matter most and that seem to be working best.

Details that support these findings are contained in the remainder of this Livability Report, starting with the ratings for Community Characteristics, Governance and Participation and ending with results for Montgomery County's unique questions.

Legend

■ Higher than national benchmark
■ Similar to national benchmark
■ Lower than national benchmark

✴ Most important

Safety · Natural Environment · Built Environment · Recreation and Wellness · Education and Enrichment · Mobility · Economy · Community Engagement
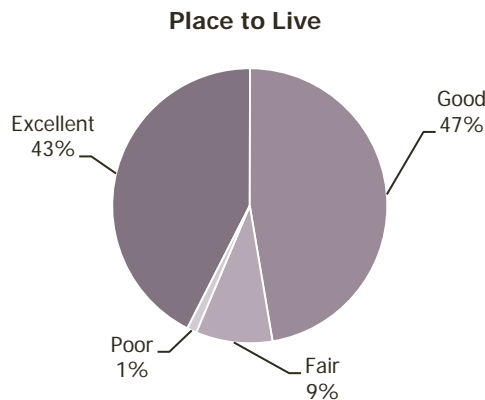
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Community Characteristics

What makes a community livable, attractive and a place where people want to be?

Overall quality of community life represents the natural ambience, services and amenities that make for an attractive community. How residents rate their overall quality of life is an indicator of the overall health of a community. In the case of Montgomery County, 90% rated the County as an excellent or good place to live. Respondents' ratings of Montgomery County as a place to live were similar to ratings in other communities across the nation.

In addition to rating the County as a place to live, respondents rated several aspects of community quality including Montgomery County as a place to raise children and to retire, their neighborhood as a place to live, the overall image or reputation of Montgomery County and its overall appearance. About 8 in 10 respondents gave high marks to the overall image of Montgomery County, their neighborhoods, the county as a place to raise children and to the overall appearance of the county. These ratings were on par with national averages, and ratings for neighborhood as a place to live increased from 2017 to 2019 (see the *Trends over Time* report under separate cover). About 4 in 10 respondents gave positive assessments to the County as a place to retire; this rating was lower than the national average.

Delving deeper into Community Characteristics, survey respondents rated over 40 features of the community within the eight facets of Community Livability. A majority of respondents gave excellent or good ratings to all aspects of Safety, Natural Environment and Recreation and Wellness and all aspects within these facets were similar to the national benchmarks. Within Mobility, ratings ranged from 32% excellent or good (traffic flow) to 67% (overall ease of travel), and all ratings were similar to the nation with the exception of travel by public transportation which was higher than in comparison communities. Economy ratings were strong and all were higher than or similar to the benchmark, with the exception of cost of living which received high marks from 22% of residents and was lower than the national average. Within Education and Enrichment and Community Engagement, Montgomery County residents gave exceptionally strong ratings to education and enrichment opportunities, cultural activities, adult education and to the openness and acceptance of the community towards people of diverse backgrounds.

Place to Live

Excellent 43%

Good 47%

Fair 9%

Poor 1%

Several aspects of Community Characteristics received higher ratings from residents in 2019 compared to 2017. Some of the ratings that increased included: overall ease of getting to the places you usually have to visit, availability of paths and walking trails, overall built environment of Montgomery County, shopping opportunities, vibrant downtowns/commercial areas and health and wellness opportunities.

Percent rating positively (e.g., excellent/good)

Comparison to national benchmark
■ Higher ■ Similar ■ Lower

Overall image	Neighborhood	Place to raise children	Place to retire	Overall appearance
84%	87%	86%	43%	81%
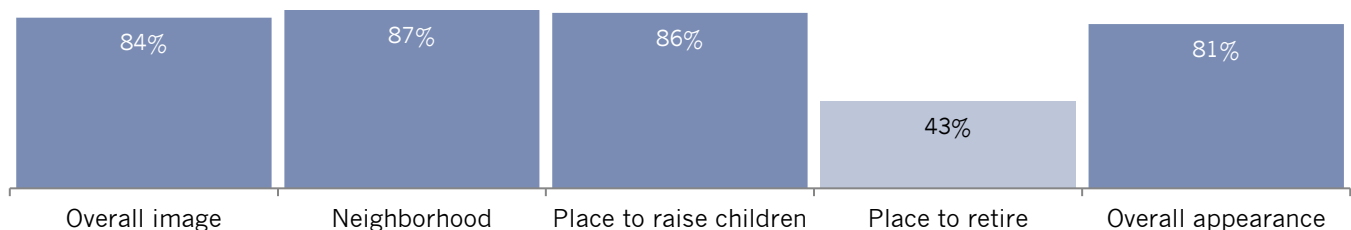
Figure 1: Aspects of Community Characteristics

Percent rating positively (e.g., excellent/good, very/somewhat safe)

Comparison to national benchmark

■ Higher
■ Similar
■ Lower

SAFETY
Overall feeling of safety — 84%
Safe in neighborhood — 94%
Safe downtown/commercial area — 91%

MOBILITY
Overall ease of travel — 67%
Paths and walking trails — 66%
Ease of walking — 58%
Travel by bicycle — 43%
Travel by public transportation — 51%
Travel by car — 48%
Public parking — 49%
Traffic flow — 32%

NATURAL ENVIRONMENT
Overall natural environment — 82%
Cleanliness — 78%
Air quality — 71%

BUILT ENVIRONMENT
Overall built environment — 71%
New development in Montgomery County — 66%
Affordable quality housing — 25%
Housing options — 54%
Public places — 77%

ECONOMY
Overall economic health — 78%
Vibrant downtown/commercial area — 75%
Business and services — 75%
Cost of living — 22%
Shopping opportunities — 85%
Employment opportunities — 66%
Place to visit — 70%
Place to work — 80%

RECREATION AND WELLNESS
Health and wellness — 82%
Mental health care — 53%
Preventive health services — 72%
Health care — 64%
Food — 72%
Recreational opportunities — 77%
Fitness opportunities — 74%

EDUCATION AND ENRICHMENT
Education and enrichment opportunities — 85%
Religious or spiritual events and activities — 85%
Cultural/arts/music activities — 76%
Adult education — 76%
K-12 education — 82%
Child care/preschool — 44%

COMMUNITY ENGAGEMENT
Social events and activities — 71%
Neighborliness — 62%
Openness and acceptance — 75%
Opportunities to participate in community matters — 74%
Opportunities to volunteer — 79%

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Governance

How well does the government of Montgomery County meet the needs and expectations of its residents?

The overall quality of the services provided by Montgomery County as well as the manner in which these services are provided is a key component of how residents rate their quality of life. About 8 in 10 gave high marks to the overall quality of services provided by the County and about 5 in 10 gave high marks to the overall quality of services provided by the Federal Government. Both ratings were similar to the national benchmarks.

Survey respondents also rated various aspects of Montgomery County's leadership and governance. A majority of residents have high marks to each aspect and all ratings were similar to national averages. Several measures saw improvements in ratings from 2017 to 2019: the value of services for taxes paid to Montgomery County, the job the County does at welcoming resident involvement, overall confidence in County government, generally acting in the best interest of the community and the overall quality of services provided by Montgomery County employees.

Respondents evaluated over 30 individual services and amenities available in Montgomery County. Almost all aspects of Governance received high marks from a majority of survey respondents, and all were at least on par with national averages. Montgomery County residents gave exceptionally high marks to bus or transit services, recreation programs and recreation centers; ratings for each of these services were higher than the benchmarks. Survey respondents gave higher marks to several aspects of Governance in 2019; across all facets within the pillar. No ratings of Governance decreased from 2017 to 2019. Some of the 24 services that saw increased ratings include: emergency preparedness, street lighting, snow removal, bus or transit services, preservation of natural areas, power utility, County parks, public library services and County-sponsored special events.

Overall Quality of County Services
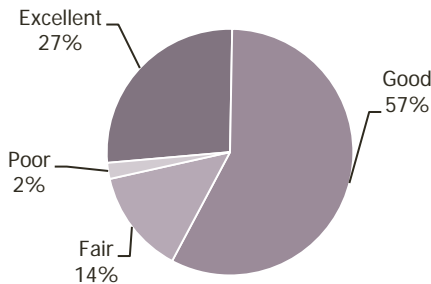
- Excellent 27%
- Good 57%
- Poor 2%
- Fair 14%

Percent rating positively (e.g., excellent/good)

Comparison to national benchmark

■ Higher ■ Similar ■ Lower

Value of services for taxes paid	Overall direction	Welcoming resident involvement	Confidence in County government	Acting in the best interest of Montgomery County	Being honest	Treating all residents fairly	Customer service	Services provided by the Federal Government
57%	57%	57%	62%	61%	59%	55%	77%	53%

Figure 2: Aspects of Governance
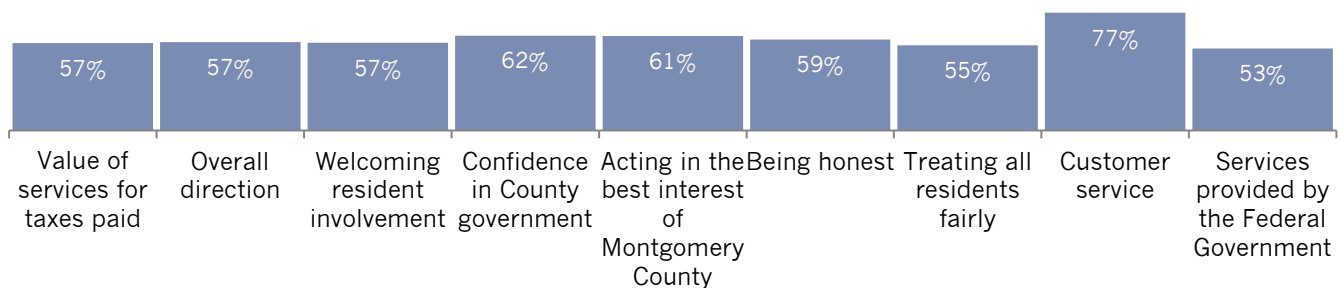
*Percent rating positively
(e.g., excellent/good)*

**Comparison to national
benchmark**

■ Higher

■ Similar

■ Lower

SAFETY
- Police — 84%
- Fire — 96%
- Ambulance/EMS — 94%
- Crime prevention — 72%
- Fire prevention — 83%
- Animal control — 69%
- Emergency preparedness — 71%

MOBILITY
- Traffic enforcement — 62%
- Street repair — 42%
- Street cleaning — 63%
- Street lighting — 70%
- Snow removal — 72%
- Sidewalk maintenance — 65%
- Traffic signal timing — 57%
- Bus or transit services — 79%

NATURAL ENVIRONMENT
- Garbage collection — 86%
- Recycling — 86%
- Yard waste pick-up — 85%
- Drinking water — 78%
- Natural areas preservation — 69%
- Open space — 67%

BUILT ENVIRONMENT
- Storm drainage — 75%
- Sewer services — 87%
- Power utility — 83%
- Utility billing — 70%
- Land use, planning and zoning — 55%
- Code enforcement — 58%
- Cable television — 62%

ECONOMY
- Economic development — 62%

RECREATION AND WELLNESS
- County parks — 90%
- Recreation programs — 86%
- Recreation centers — 85%
- Health services — 77%

EDUCATION AND ENRICHMENT
- Public libraries — 92%
- Special events — 74%

COMMUNITY ENGAGEMENT
- Public information — 82%

Participation

Are the residents of Montgomery County connected to the community and each other?

An engaged community harnesses its most valuable resource, its residents. The connections and trust among residents, government, businesses and other organizations help to create a sense of community, a shared sense of membership, belonging and history. About 6 in 10 respondents gave excellent or good ratings to the overall sense of community; this rating was similar to the national benchmark and increased from 2017 to 2019. About four in five respondents would recommend living in Montgomery County and were likely to remain in the county for the next five years; these rates were on par with comparison communities.

The survey included over 30 activities and behaviors for which respondents indicated how often they participated in or performed each, if at all. Levels of participation varied widely across the different facets, making the benchmark comparisons useful for interpreting the results. Within Mobility, more Montgomery County residents reported that they had used public transportation than their peers. More Montgomery County residents had NOT observed a code violation in the last 12 months than those in comparison communities. Further, more survey respondents reported that they had visited a County library than those elsewhere. Almost all reported rates of Participation remained stable over time; however, fewer respondents were optimistic about their personal economic futures in 2019 compared to 2017.

Sense of Community

- Excellent 15%
- Poor 9%
- Good 45%
- Fair 31%

Percent rating positively (e.g., very/somewhat likely, yes)

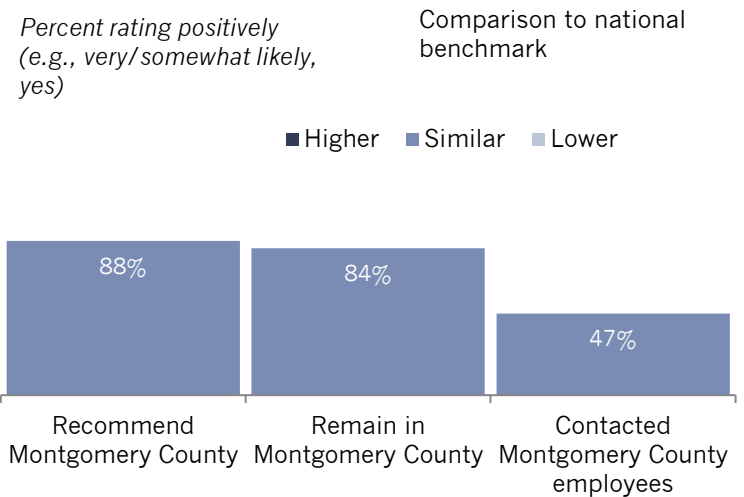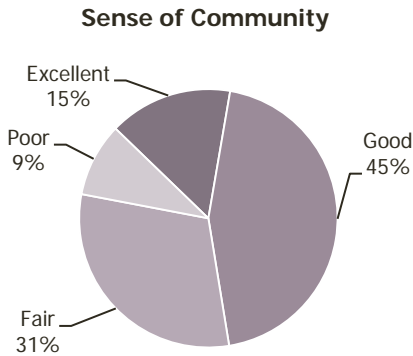Comparison to national benchmark

■ Higher ■ Similar ■ Lower

Recommend Montgomery County	Remain in Montgomery County	Contacted Montgomery County employees
88%	84%	47%

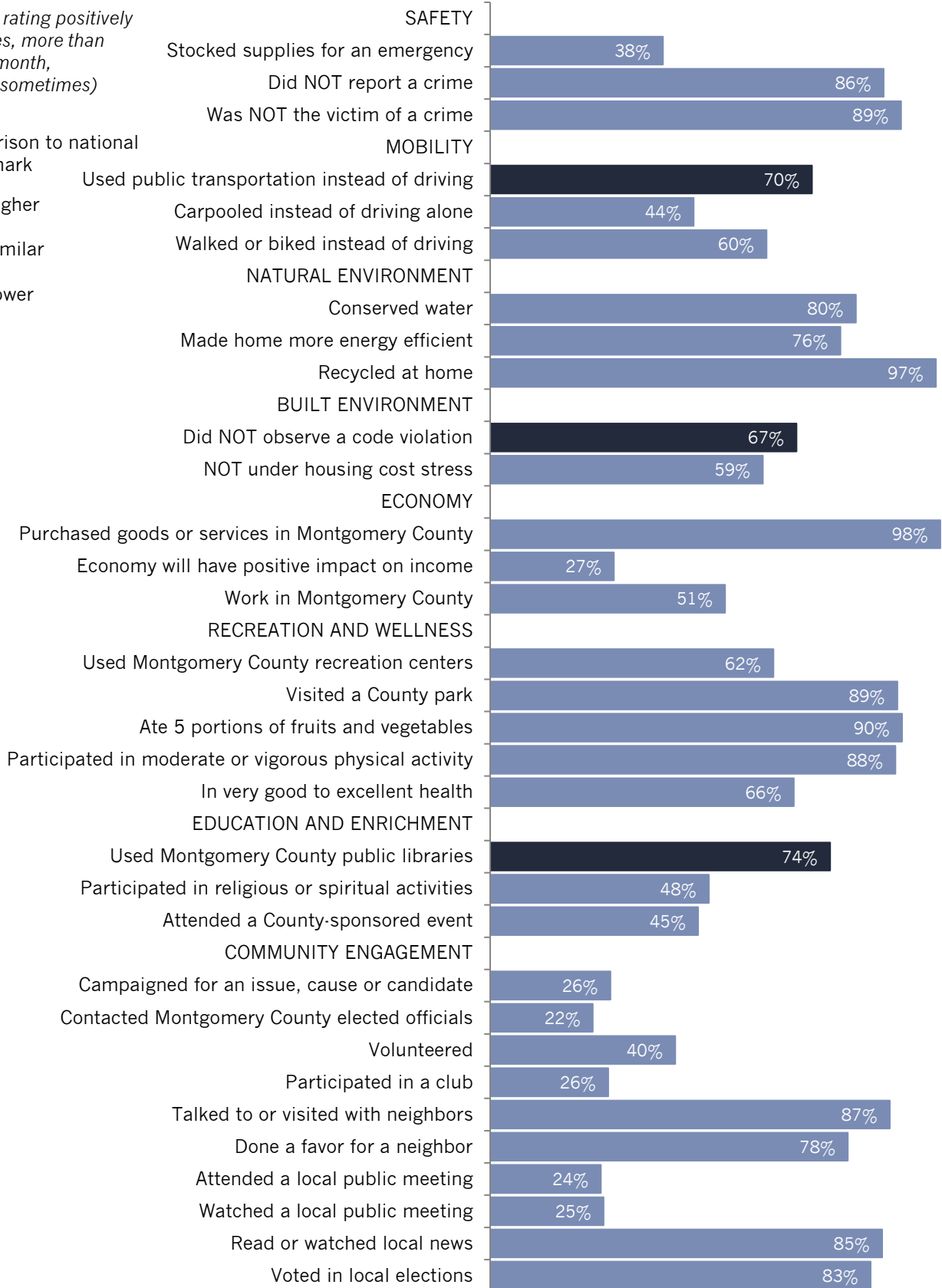## Figure 3: Aspects of Participation

Percent rating positively (e.g., yes, more than once a month, always/sometimes)

Comparison to national benchmark

- ■ Higher
- ■ Similar
- ■ Lower

SAFETY
- Stocked supplies for an emergency — 38%
- Did NOT report a crime — 86%
- Was NOT the victim of a crime — 89%

MOBILITY
- Used public transportation instead of driving — 70%
- Carpooled instead of driving alone — 44%
- Walked or biked instead of driving — 60%

NATURAL ENVIRONMENT
- Conserved water — 80%
- Made home more energy efficient — 76%
- Recycled at home — 97%

BUILT ENVIRONMENT
- Did NOT observe a code violation — 67%
- NOT under housing cost stress — 59%

ECONOMY
- Purchased goods or services in Montgomery County — 98%
- Economy will have positive impact on income — 27%
- Work in Montgomery County — 51%

RECREATION AND WELLNESS
- Used Montgomery County recreation centers — 62%
- Visited a County park — 89%
- Ate 5 portions of fruits and vegetables — 90%
- Participated in moderate or vigorous physical activity — 88%
- In very good to excellent health — 66%

EDUCATION AND ENRICHMENT
- Used Montgomery County public libraries — 74%
- Participated in religious or spiritual activities — 48%
- Attended a County-sponsored event — 45%

COMMUNITY ENGAGEMENT
- Campaigned for an issue, cause or candidate — 26%
- Contacted Montgomery County elected officials — 22%
- Volunteered — 40%
- Participated in a club — 26%
- Talked to or visited with neighbors — 87%
- Done a favor for a neighbor — 78%
- Attended a local public meeting — 24%
- Watched a local public meeting — 25%
- Read or watched local news — 85%
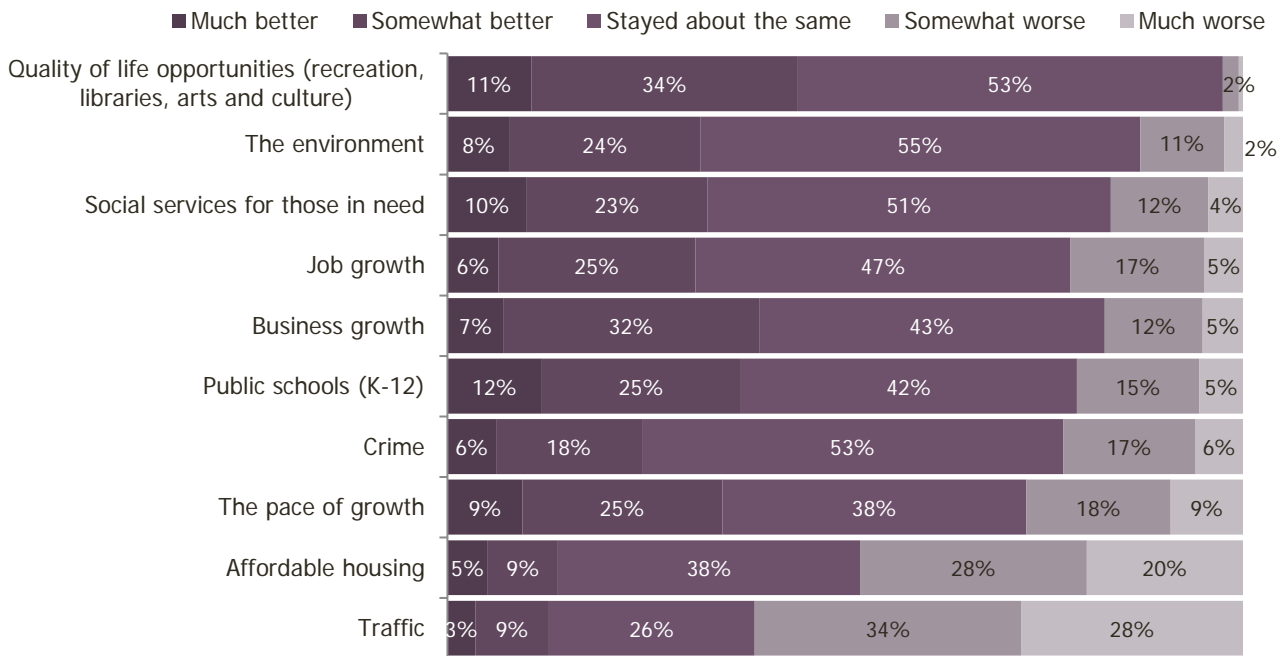- Voted in local elections — 83%

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Special Topics

Montgomery County included 12 questions of special interest on The NCS. Residents rated the status of several specific areas of County focus. About half or more of respondents felt that quality of life opportunities, the environment, social services for those in need and crime had stayed about the same in the past two years. About 4 in 10 respondents felt quality of life opportunities, business growth and public schools had gotten much or somewhat better. About 6 in 10 that that traffic had gotten somewhat or much worse in the last two years.
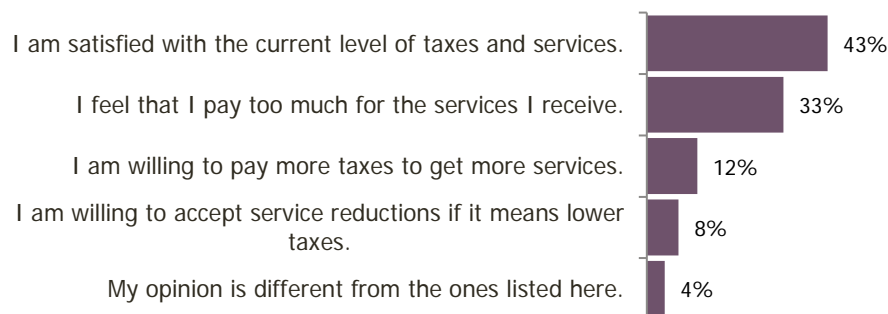
Figure 4: County Focus Areas
Thinking now about some more specific areas of focus, please indicate if each of the following have gotten better, worse or stayed the same in Montgomery County over the past two years.

	Much better	Somewhat better	Stayed about the same	Somewhat worse	Much worse
Quality of life opportunities (recreation, libraries, arts and culture)	11%	34%	53%		2%
The environment	8%	24%	55%	11%	2%
Social services for those in need	10%	23%	51%	12%	4%
Job growth	6%	25%	47%	17%	5%
Business growth	7%	32%	43%	12%	5%
Public schools (K-12)	12%	25%	42%	15%	5%
Crime	6%	18%	53%	17%	6%
The pace of growth	9%	25%	38%	18%	9%
Affordable housing	5%	9%	38%	28%	20%
Traffic	3%	9%	26%	34%	28%

Residents selected the statement that best described their opinion regarding the level of taxes and services. About 4 in 10 were satisfied with the current level of taxes and services, and about 3 in 10 felt they paid too much for the services they received. About 1 in 10 were willing to accept service reductions or pay more taxes to get more services.

Figure 5: Level of Taxes and Services
Please select the statement that best describes your opinion.

I am satisfied with the current level of taxes and services.	43%
I feel that I pay too much for the services I receive.	33%
I am willing to pay more taxes to get more services.	12%
I am willing to accept service reductions if it means lower taxes.	8%
My opinion is different from the ones listed here.	4%

Survey respondents indicated if they needed the County Government to resolve an issue in the past two years. Only about 16% reported that they had needed the County's help. About three-quarters of those that had contacted the County for help thought it was very or somewhat easy to communicate the issue to the County, and more than half thought it was very or somewhat easy to resolve the issue.

Figure 6: Needed County Government to Resolve an Issue
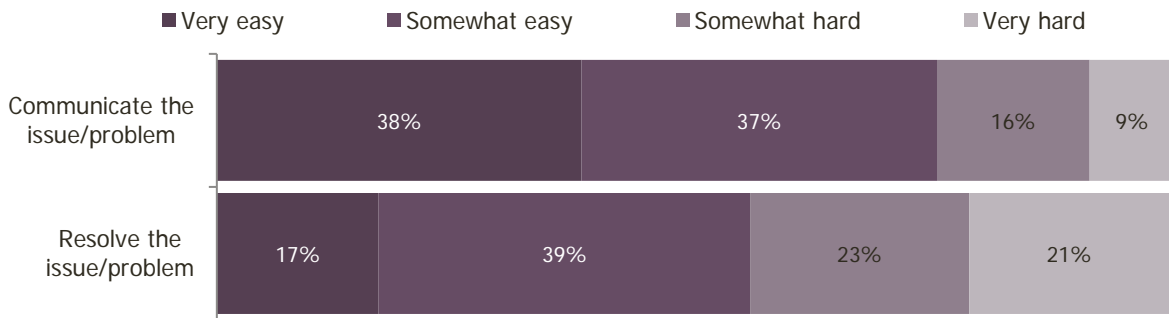*Have you needed the County Government to resolve an issue or problem in the past two years?*

Yes
16%

No
84%
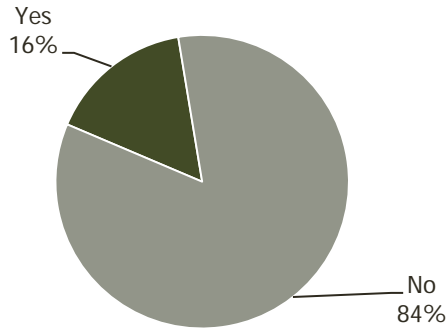
Figure 7: Ease of Communicating and Resolving Issue
Please indicate how easy or hard it was to do each of the following.

■ Very easy   ■ Somewhat easy   ■ Somewhat hard   ■ Very hard

	Very easy	Somewhat easy	Somewhat hard	Very hard
Communicate the issue/problem	38%	37%	16%	9%
Resolve the issue/problem	17%	39%	23%	21%

Asked only of those who reported having needed the County to resolve an issue or problem in the last two years.

Several County-specific questions asked respondents about interaction with Montgomery County Police Department (MCPD) employees. Most respondents had not had any in-person, phone or online contact with an MCPD employee in the last two years. Of those that did have contact, about four in five agreed that they were treated fairly. Further, at least 7 in 10 residents who had contact with the MCPD gave high marks to the professionalism, approachability and responsiveness of the MCPD employee.

Figure 8: Interaction with a Montgomery County Police Department Employee
How many times, if any, have you interacted with a Montgomery County Police Department (MCPD) employee within the last two years?

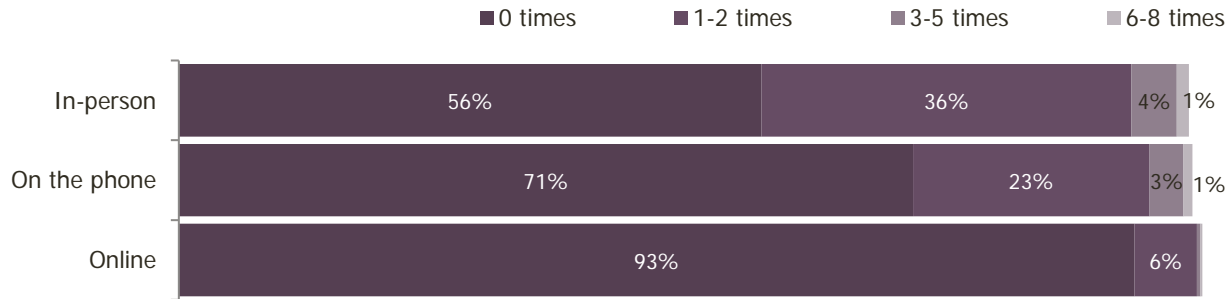|	0 times	1-2 times	3-5 times	6-8 times
In-person	56%	36%	4%	1%
On the phone	71%	23%	3%	1%
Online	93%	6%		

Figure 9: Fair Treatment from Montgomery County Police Department Employee
To what extent do you agree or disagree that the MCPD employee(s) you interacted with treated you fairly?
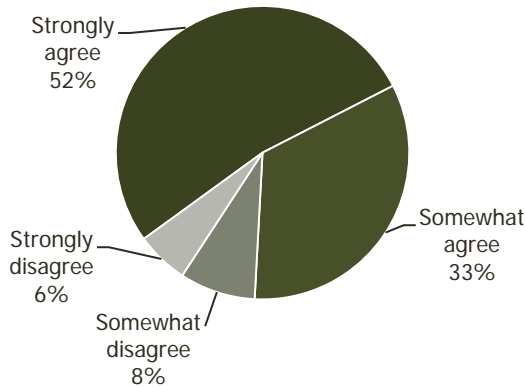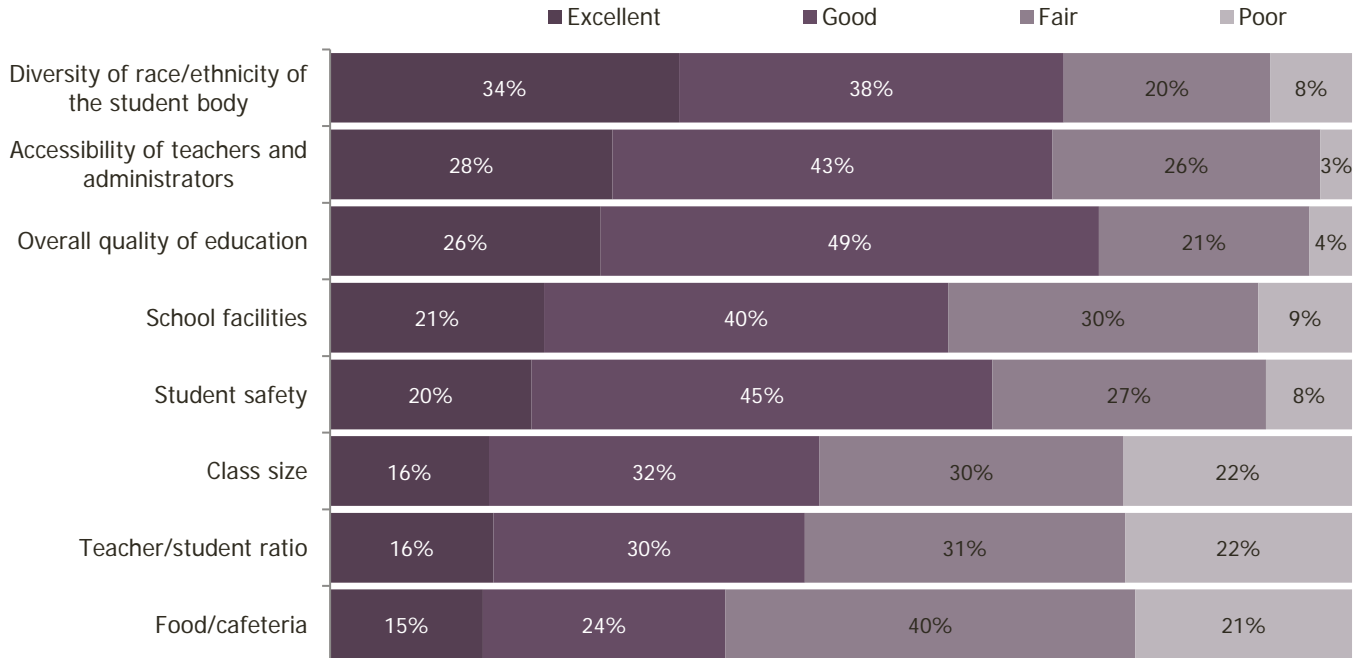

Strongly agree 52%
Somewhat agree 33%
Somewhat disagree 8%
Strongly disagree 6%

Figure 10: Aspects of Interaction with Montgomery County Police Department Employee
Please rate each of the following aspects of the MCPD employee(s) with whom you personally had contact:

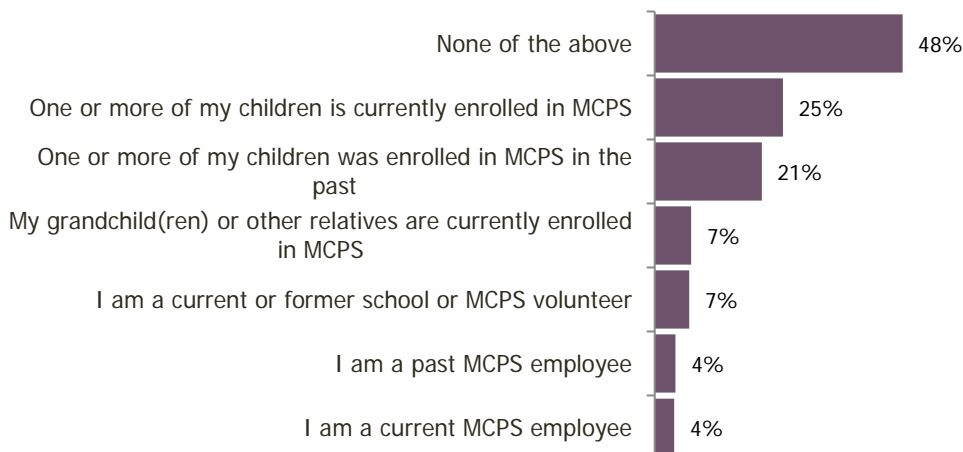|	Excellent	Good	Fair	Poor
Responsiveness	41%	25%	20%	14%
Approachability	40%	34%	10%	17%
Professionalism	45%	32%	19%	5%
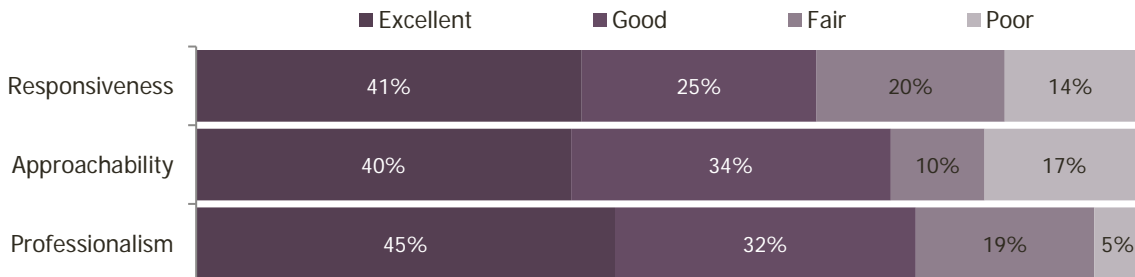
Residents shared their opinions about different aspects of Montgomery County Public Schools (MCPS). While those who had an opinion tended to give positive marks to each aspect such as diversity of race/ethnicity of the student body, accessibility of teachers and administrators and the overall quality of education, it is worth noting that about half or more of all respondents answered "don't know" to each aspect. (For the full frequencies of responses to all questions, including "don't know" see Appendix A of the *Technical Appendices* provided under separate cover).

Figure 11: Aspects of Montgomery County K-12 Public Schools
Please rate each of the following aspects of Montgomery County K-12 public schools.

Aspect	Excellent	Good	Fair	Poor
Diversity of race/ethnicity of the student body	34%	38%	20%	8%
Accessibility of teachers and administrators	28%	43%	26%	3%
Overall quality of education	26%	49%	21%	4%
School facilities	21%	40%	30%	9%
Student safety	20%	45%	27%	8%
Class size	16%	32%	30%	22%
Teacher/student ratio	16%	30%	31%	22%
Food/cafeteria	15%	24%	40%	21%

Survey participants were also asked about their current connection to MCPS, about one-quarter of respondents said they had a child that was currently enrolled in MCPS, and about 2 in 10 said they previously had a child enrolled in MCPS. About half of the respondents selected "none of the above", meaning they did not have current or past children or grandchildren enrolled in MCPS and they had not volunteered or been employed by MCPS.

Figure 12: Connection to Montgomery County Public Schools
Which, if any, apply to your current connection to Montgomery County Public Schools (MCPS)? (Check all that apply)

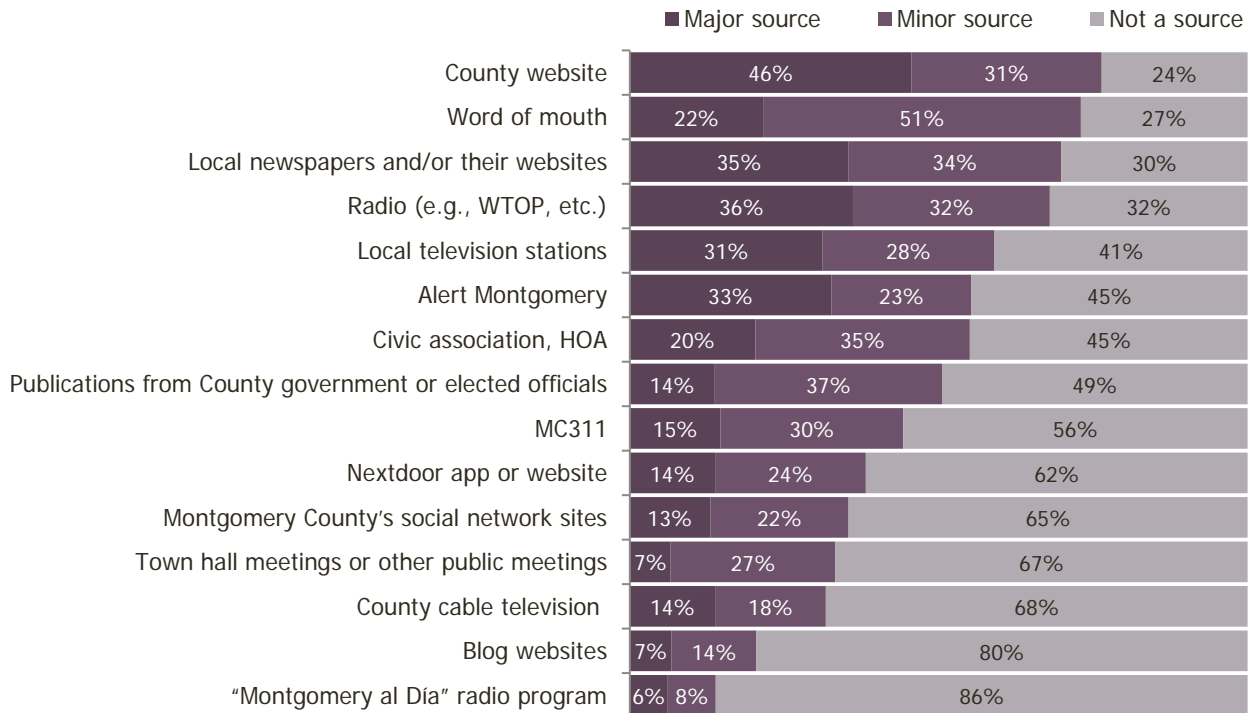| Connection	Percent
None of the above	48%
One or more of my children is currently enrolled in MCPS	25%
One or more of my children was enrolled in MCPS in the past	21%
My grandchild(ren) or other relatives are currently enrolled in MCPS	7%
I am a current or former school or MCPS volunteer	7%
I am a past MCPS employee	4%
I am a current MCPS employee	4%

When asked if they agreed or disagreed with adjusting the boundaries of MCPS to increase student diversity and better utilize capacity in its schools, about 7 in 10 respondents indicated that they somewhat or strongly agreed.

Figure 13: Adjusting Boundaries of Montgomery County Public Schools
To what extent do you agree or disagree that Montgomery Public Schools (MCPS) should consider adjusting school boundaries in order to increase student diversity and better utilize capacity in its schools?
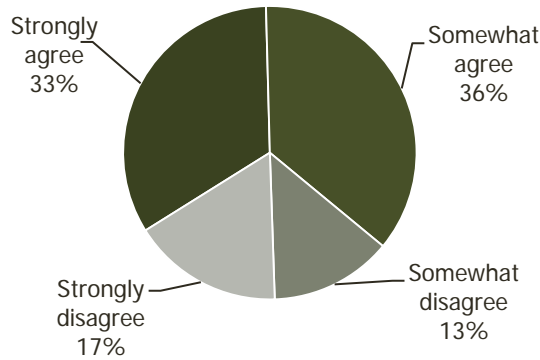
Montgomery County residents were asked about the sources they used to get information about County services, activities and events. The County website was at the top of the list, followed by word of mouth, local newspapers/websites, radio, local television stations, Alert Montgomery and civic associations. Less popular sources of information included the "Montgomery al Día" radio program, blogs, County cable television and Town hall meetings or other public meetings.

Figure 14: Potential Information Sources
Please indicate the extent to which you use each of the following potential sources for information about County services, activities and events.

	Major source	Minor source	Not a source
County website	46%	31%	24%
Word of mouth	22%	51%	27%
Local newspapers and/or their websites	35%	34%	30%
Radio (e.g., WTOP, etc.)	36%	32%	32%
Local television stations	31%	28%	41%
Alert Montgomery	33%	23%	45%
Civic association, HOA	20%	35%	45%
Publications from County government or elected officials	14%	37%	49%
MC311	15%	30%	56%
Nextdoor app or website	14%	24%	62%
Montgomery County's social network sites	13%	22%	65%
Town hall meetings or other public meetings	7%	27%	67%
County cable television	14%	18%	68%
Blog websites	7%	14%	80%
"Montgomery al Día" radio program	6%	8%	86%

Conclusions

Residents continue to enjoy a high quality of life and strong sense of safety.

At least 8 in 10 community members gave high marks to the overall quality of life in Montgomery County, as well to Montgomery County as a place to live and raise children, their neighborhoods, the overall image and to the overall appearance of the county. At least four in five were likely to recommend living in Montgomery County to someone who asked and planned to remain in the county for the next five years. About 6 in 10 residents favorably assessed the overall sense of community, and this rating increased from 2017 to 2019.

Residents identified Safety as a priority for the Montgomery County community and most reported feeling safe. Almost all residents gave high scores to their overall feeling of safety, their feeling of safety in their neighborhood and in the downtowns/commercial areas. About 9 in 10 residents reported not having been a victim of crime in the 12 months prior to the survey. Evaluations of safety-related City services (e.g., police, fire, ambulance/EMS) were positive, and ratings for emergency preparedness increased in 2019. When asked about interactions with Montgomery County Police Department (MCPD) employees, those who had contact gave positive assessments.

Mobility is a continued asset and positive sentiments increased over the last two years.

When asked to rate the importance of several different community focus areas over the coming two years, Montgomery County residents identified Mobility as one of the most important. Ratings within the facet of Mobility were strong, and all were at least on par with comparison communities. Several aspects of Mobility have been trending up since 2017, including traffic flow on major streets, ease of walking, ease of travel by public transportation, availability of paths and trails, snow removal, sidewalk maintenance, and bus or transit services, among others. Further, ratings for travel by public transportation and bus or transit services in Montgomery County were higher than the benchmarks. Montgomery County also reported much higher levels of using public transportation instead of driving than residents in other communities across the nation.

Community livability ratings are on the rise.

In 2019, Montgomery County residents recorded improvements across all three pillars and all eight facets of community livability. Overall, the number of increased ratings was notably high; of the 134 items for which comparisons were available, 83 items were rated similarly in 2017 and 2019, 48 items showed an increase in ratings and only three items decreased.

Within Community Characteristics, the facets that saw the highest number of improved ratings included Mobility (traffic flow, ease of walking, ease of travel by public transportation, overall ease of travel, ease of public parking, availability of paths and trails) and Economy (shopping opportunities, Montgomery County as a place to visit, vibrant downtowns/commercial areas, overall quality of businesses and service establishments). However, improvements were also noted within Built Environment, Recreation and Wellness and Community Engagement. There were also several notable increases for aspects of Governance when comparing 2017 ratings to 2019. General aspects of County Governance, along with Mobility, Natural Environment and Built Environment saw the highest concentration of rating increases. Montgomery County residents gave more positive assessments to the overall customer service provided by County employees, the value of services for taxes paid to the County, the job the County government does at welcoming resident involvement, overall confidence in County government and generally acting in the best interest of the community. As previously noted, many mobility-related services saw rating improvements from 2017 to 2019. Some of the other highlights included increased assessments of recycling, preservation of natural areas, code enforcement, power utility and utility billing. No aspects of Governance decreased from 2017 to 2019.