



OFFICE OF THE COUNTY EXECUTIVE


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MEMORANDUM

March 4, 2025

TO: Kate Stewart, President  
Montgomery County Council

FROM: Richard S. Madaleno, Chief Administrative Officer 

SUBJECT: Montgomery County 2024 Resident Survey – Executive Summary

Below is a high-level summary of the results of our 2024 Resident Survey. Additionally, in-depth response data that may interest you and your colleague can be found in the reports that are attached - most notably the report detailing survey results by Council District.

**Background**

The National Research Center, Inc. (NRC) administered the survey using two methods. First, a random sample of 6,000 Montgomery County households were mailed the survey on August 19, 2024, and data collection for the survey remained open for six weeks. Selected households were subsequently sent a second reminder mailing, and both mailings gave respondents the option to complete the survey on paper and return it by mail or use a unique code to complete the survey online. The survey was available in the County’s eight most spoken languages. 761 residents completed it, providing an overall response rate of 13% (up from the 11% response rate in 2021).

Second, the County also offered all residents the opportunity to take the survey, providing a supplemental non-random, non-scientific self-selected sample. This “opt-in” web-only survey was open for three weeks starting September 12 and was publicized through a variety of channels, yielding 2,782 responses. This is more in line with the response rate of 2019, which received 3,211 responses, and represents a significant decrease compared to the 12,698 opt-in responses received in 2017 and the 5,246 responses in 2021. This is generally not a concern as the random-sample survey results offer a more valid assessment of public opinion, while the opt-in survey results are considered supplemental data.

**Deliverables**

NRC created a series of reports that will be made public on the County website (as has been past practice), including: “Trends over Time” (comparing 2024 responses to our prior three surveys in 2017, 2019, and 2021); a “Community Livability Report” that examines responses across eight high-level facets (Safety, Mobility, Economy, etc.); a high-level “Dashboard Summary of Findings”; comparison reports breaking out

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responses by demographic subgroups (years of residence, household income, race, ethnicity, and age) and geographic subgroups (RSCs and Council Districts); the “Supplemental Online [opt-in] Survey Results”; and a set of Technical Appendices (complete response data, benchmark comparisons, detailed survey methods, and the survey materials used by NRC).

**Note:** The information below

1. pertains ONLY to the scientific random-sample surveys.
2. includes a margin of error for any reported percentage which is +/- 4% for all responses, and
3. is only a sample of the data presented in the various reports prepared by NRC.

**2024 Survey Results**

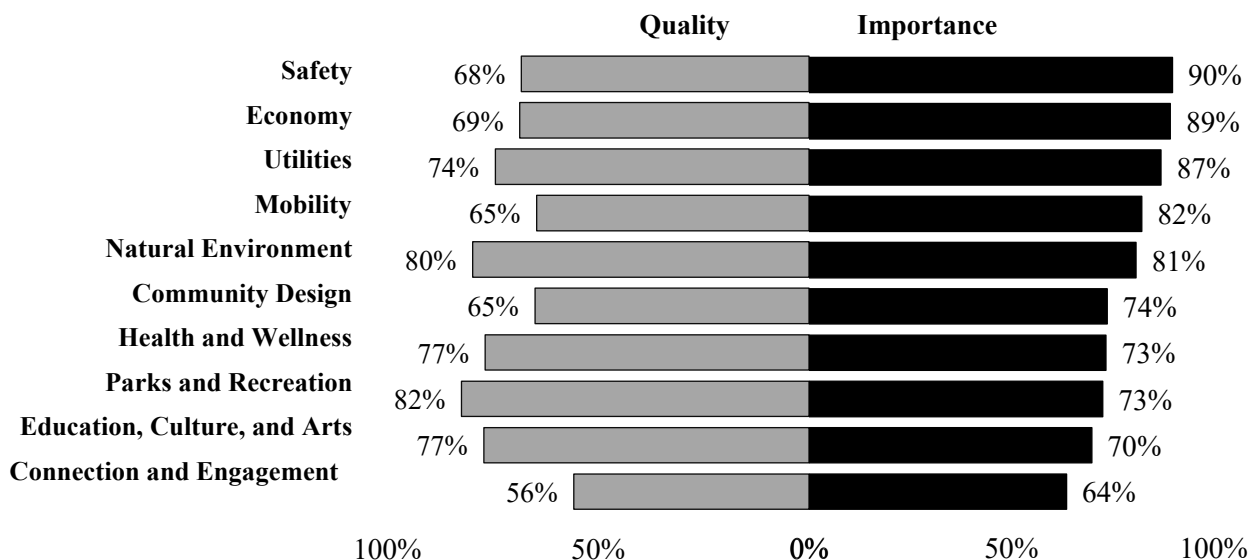
The overall assessment indicates a **decrease** in ratings from 2021. In 2024, there were 123 standard questions for which comparisons were available to 2021. Of those:

- 46 items were rated similarly (within +/- 5 percentage points)
- 77 items showed a **decrease** in ratings.

Based on feedback from NRC, there is substantial evidence of a COVID-related surge in national benchmark ratings for all surveys conducted in 2021 and 2022. Overall, NRC has observed a downward national trend in ratings when comparing 2021 to 2024 survey periods.

**Quality vs. Importance**

The survey prompts respondents to evaluate both the quality and importance of various community facets, offering valuable insights into the areas that matter most to residents. The chart below compares the ratings of quality (on the left) with the priority (on the right) placed on each facet. This comparison not only reveals where the County is considered to be performing well but also highlights areas that may require additional focus and resources to bridge gaps between resident expectations and the services provided.



Similar to the 2021 survey, **Safety, Economy, and Utilities** remain the County's top priorities for residents. These areas continue to show the largest gap between perceived quality and importance, suggesting an opportunity for the County to focus efforts on aligning services more closely with community expectations. Additionally, these areas have seen significant drops in perceived quality from 2021 to 2024, further highlighting the need for attention and improvement to better meet resident needs.

**Noteworthy high-level data points (all percentages listed exclude responses of “don’t know”)**

Below is a selection of trends over time for a variety of questions of general importance and/or of likely interest to this administration; these represent *only a portion of the complete survey*.

	<b>% Rating Positively (excellent/good)</b>			
	<b>2017</b>	<b>2019</b>	<b>2021</b>	<b>2024</b>
The overall quality of life in Montgomery County	82%	85%	86%	74%
Overall image or reputation of Montgomery County	80%	84%	82%	76%
Montgomery County as a place to live	88%	90%	90%	84%
Your neighborhood as a place to live	82%	87%	90%	85%
Montgomery County as a place to raise children	84%	86%	88%	78%
Sense of community	55%	60%	62%	58%
Recommend living in Montgomery County to someone who asks	87%	88%	89%	84%
Montgomery County as a place to retire	42%	43%	45%	37%
Overall appearance of Montgomery County	79%	81%	78%	71%
Overall feeling of safety in Montgomery County	81%	84%	77%	68%
Ease of travel by public transportation	45%	51%	51%	53%
Traffic flow on major streets	26%	32%	38%	38%
Cleanliness of Montgomery County	76%	78%	77%	71%
Availability of affordable quality housing	27%	25%	24%	18%
Overall economic health of Montgomery County	78%	78%	75%	69%
K-12 Education	82%	82%	81%	68%
Availability of affordable quality childcare/preschool	49%	44%	51%	39%
Overall customer service by MCG employees	70%	77%	78%	75%
The value of services for the taxes paid	49%	57%	53%	46%
The overall direction that Montgomery County is taking	58%	57%	57%	55%
Overall confidence in Montgomery County government	57%	62%	63%	56%

- The survey covers a wide range of specific MCG services and community aspects, both in terms of satisfaction and participation, including but not limited to:

**Highest-performing areas**

- Residents offered high marks for the County's efforts to **attract and value residents from diverse backgrounds**, as well as **the openness and acceptance toward people of diverse backgrounds**. Both of these areas ranked higher or much higher than the national benchmark average.
- **Fire and Ambulance/EMS Services** continues to rate positively overall, including Fire Services (90% positive) and Ambulance/EMS Services (87%).

- Respondents reported overall satisfaction with **County services**, including Public Libraries (88% positive), sewer services (84%), parks (82%), election/voter services (82%), and garbage collection (80%).
- **Education, arts, and culture** received positive feedback, with both the overall facet of education and opportunities to attend cultural/arts/music activities ranking higher than national averages.
- **Parks and recreation** opportunities were rated positively by most residents, with 8 in 10 respondents praising County parks and the overall quality of parks and recreation services.
- **Overall economic sentiment** remained strong, with higher-than-average ratings for the variety of businesses and service establishments, shopping opportunities, and employment opportunities, despite some downward trends in economic areas since 2021.

### Potential areas of focus

- Residents indicated the lowest level of satisfaction with the following **County Services**: street repair (47% positive), code enforcement (48%), land use/planning/zoning (51%), traffic signal timing (51%), and traffic enforcement (53%).
- While perceptions of **safety and public safety services** have experienced some shifts, with a decline in the overall sense of safety, the responses suggest that residents still feel secure. Nine out of ten respondents reported feeling safe in their neighborhood, and eight out of ten reported feeling safe in our downtown and commercial areas. A recent Washington Post/ University of Maryland (UMD) poll from January 2025 found that only 8% of Montgomery County registered voters identified crime as their top concern. This is further supported by recent crime statistics, which show a noticeable decrease in reported crime compared to the same period last year.
- **K-12 education and adult educational opportunities** experienced statistically significant downward trends since 2021, though they remained comparable to national benchmarks.
- Respondents provided lower ratings for several aspects of **community design**, including well-planned residential and commercial growth, well-designed neighborhoods, variety of housing options, and overall quality of new development.
- The **cost of living** and **Montgomery County as a place to retire** remain key areas of concern, as these factors rank lower than national benchmarks. This sentiment is reinforced by significant declines in areas such as the availability of affordable quality food, housing, and childcare/preschool.

### Other notable results

- Around 65% of residents felt that **affordable housing** has worsened in the past two years, while 12% believed it has improved.
- Just over half of residents felt **traffic** had worsened in the past two years, which may have influenced the downward trend in ratings for traffic enforcement (from 59% positive in 2021 to 53% in 2024) and traffic signal timing (from 57% to 51%).

- For **information on services, activities, and events**, residents were most likely to use the County website, followed by word of mouth, local newspapers, Alert Montgomery, local television, publications from County government or elected officials, and radio.

**National Benchmarks**

NRC’s database of comparative resident opinion is comprised of resident perspectives gathered in surveys from over 500 communities whose residents evaluated the same kinds of topics on the National Community Survey. Of the 123 evaluative questions included in the survey, 111 were considered similar to national benchmark averages. One was considered much higher, 9 were considered higher, and 2 were considered lower. A rating is considered similar if it is within 10 points of the benchmark average, higher/lower if it is more than 10 points different from the average, and much higher/lower if it is more than 20 points different from the average.

<b>Question</b>	<b>Montgomery vs National Benchmarks</b>
Attracting people from diverse backgrounds	much higher
Variety of business and service establishments in Montgomery County	higher
Shopping opportunities	higher
Employment opportunities	higher
Ease of travel by public transportation in Montgomery County	higher
Quality of Bus or transit services	higher
Valuing/respecting residents from diverse backgrounds	higher
Openness and acceptance of the community toward people of diverse backgrounds	higher
Overall opportunities for education, culture, and the arts	higher
Opportunities to attend cultural/arts/music activities	higher
Cost of living in Montgomery County	lower
Montgomery County as a place to retire	lower

**Custom Questions**

*Following the standard survey questions that NRC uses for all its surveys, our instrument included a variety of custom questions, including but not limited to:*

- Respondents were asked to indicate if the following have gotten better, worse, or stayed the same over the past two years:

	Much better	Somewhat better	Stayed about the same	Somewhat worse	Much worse	Stayed the same or improved
Affordable housing	4%	8%	22%	38%	27%	34%
Crime	3%	13%	35%	31%	18%	51%
The environment	5%	16%	65%	10%	4%	86%
The pace of growth	5%	23%	46%	16%	9%	74%

Public schools (K-12)	9%	17%	36%	25%	13%	62%
Social services	6%	18%	48%	19%	8%	72%
Traffic	3%	10%	34%	33%	19%	47%
Job growth	4%	21%	45%	21%	9%	70%
Business growth	5%	26%	44%	16%	9%	75%
Quality of life opportunities (recreation/libraries/arts/culture)	6%	28%	59%	4%	3%	93%
Equity	7%	25%	51%	9%	8%	83%

- **Satisfaction with taxes vs. services**

	2021	2024
I feel that I pay too much for the services I receive	29%	42%
I am satisfied with the current level of taxes and services	40%	29%
I am willing to pay more taxes to get more services	9%	11%
I am willing to accept service reductions if it means lower taxes	9%	7%
I don't have an opinion/no preference	9%	9%
My opinion is different from the ones listed here	3%	3%

Public opinion has shifted from 2021 to 2024, with more people feeling they pay too much for services (29% vs. 42%) and less satisfaction with the balance of taxes and services (40% vs. 29%). Willingness to pay more taxes or accept service reductions has remained low. However, this is also different than the results in the recent Washington Post/ UMD poll that found broad support for Governor Moore's tax proposals.

- **The need for MCG assistance and issue/problem resolution:**

	Yes	No
Have you needed the County Government to resolve an issue or problem in the past two years?	19%	81%

The 19% who responded “Yes” were asked how easy or hard it was to:

	Very easy	Somewhat Easy	Somewhat hard	Very hard
Communicate the issue/problem	31%	33%	19%	18%
Resolve the issue/problem	17%	22%	22%	39%

The responses regarding MCG's assistance and issue resolution are comparable to 2021, with 22% in 2021 and 19% in 2024 indicating they needed help from the County Government to resolve an issue in the past two years. While the ease of communication has slightly improved, with ratings of somewhat or very easy increasing from 61% to 64%, the ease of resolution has decreased from 47% in 2021 to 39% in 2024.

- A specific set of questions relating to **MCPD conduct and public perception**

How many times, if any, have you interacted with an MCPD employee within the last two years?	0 times	1-2 times	3-5 times	6-8 times	9 or more times
In-person	66%	28%	3%	0%	3%
On the phone	72%	19%	5%	1%	2%
Online	92%	5%	2%	0%	1%

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly Disagree
To what extent do you agree or disagree that the MCPD employee(s) you interacted with treated you fairly?	52%	37%	5%	6%

Please rate each of the following aspects of the MCPD employee(s) with whom you personally had contact:	Excellent	Good	Fair	Poor
Professionalism	46%	39%	12%	3%
Approachability	41%	38%	16%	6%
Responsiveness	40%	31%	20%	9%

The responses regarding MCPD conduct and public perception align with those from the 2021 survey, reflecting positively on the behavior of MCPD employees. In 2024, 34% of respondents reported in-person interactions with MCPD employees within the last two years, 27% interacted by phone, and 8% interacted online. In both 2021 and 2024, nearly 9 in 10 of those who interacted with MCPD employees felt they were treated fairly and professionally, and approximately 8 in 10 found MCPD staff to be approachable. However, when comparing 2021 and 2024, perceptions of responsiveness have declined (79% vs. 71%).

- In addition to a set of questions asking respondents to rate a variety of aspects of MCPS (class size, teacher/student ration, student safety, etc.), executive leadership requested a specific question related to **adjusting school boundaries**:

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree
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?	27%	34%	13%	26%

The responses regarding adjusting school boundaries are consistent with those from the 2019 survey (when this question was first introduced) and the 2021 survey. More than 60% of respondents (who expressed an opinion) either strongly or somewhat agreed that the school system should consider adjusting boundaries to improve student diversity and optimize school capacity.

If you have any questions, please contact Thomas Tippet, CountyStat Manager, at 240-777-2628 or [Tom.Tippet@montgomerycountymd.gov](mailto:Tom.Tippet@montgomerycountymd.gov).

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Enclosures:     The NCS Full Report - Montgomery County, MD 2024  
                  The NCS Report - Montgomery County, MD 2024 Council District Comparison

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