2015 MONTGOMERY COUNTY
AGE FRIENDLY COMMUNITY SURVEY
PRE-SUMMIT RESULTS

NOVEMBER 30, 2015 | BY COUNTYSTAT

BACKGROUND & METHODOLOGY

Background. This memo summarizes the feedback received from 2,041 Montgomery County residents aged 55+ via the Age Friendly Community Survey (open since September 2015). This analysis is intended to provide a high level snapshot of the responses collected to date. The County will continue to collect responses before, during, and after the County Executive's Summit on Aging (on December 3), with a particular focus on further outreach to underrepresented groups. As such, CountyStat will conduct a more in-depth analysis of the responses in January 2016.

Methodology. To date, the County has received 2,041 responses in four different languages (English, Spanish-107, Chinese-40, and Farsi/Persian-55). Responses were primarily collected through an online survey, which was further complemented with paper-based surveys distributed at Senior centers and other locations. Links to the online survey were distributed through the County's various newsletters and partnering organizations. Since this process did not rely exclusively on random sampling, it does not quite meet the standards of a scientific poll. However, the County's Senior Sub-Cabinet has made a concerted effort to ensure that the survey respondents broadly reflect the County's demographics.

Representativeness and Corrective Strategies. The survey respondents span in age from 55 to 97 (with 24 respondents over the age of 94) and represent no less than 73 different countries of origin—from Afghanistan to Vietnam. A large share of the respondents (70%) were women, compared to 56% of their share of the population, 65 and over. CountyStat corrected for this bias by "oversampling" the responses from men. To date, the survey has been completed by 1,411 White (non-Hispanic) residents, 162 Asian residents, 139 Hispanic residents, 120 Black or African American residents, and 51 residents from other ethnic groups (as well as 140 unknown). As with gender, CountyStat used an oversampling technique to better match the County's demographics by improving the representation of Asian respondents (9% in survey vs. 14% among 65+ residents County-wide) and Black or African American respondents (6.4% vs. 12%). Additionally, the County hosted a number of focus groups with minority residents to ensure that their voices help shape the County's senior strategy. A few biases remain: (1) residents between the age of 65-74 are slightly overrepresented at the expense of those over 85 and under 60; (2) respondents are more likely to be home owners than the County average (89% vs. 79%); (3) upper-middle income households appear to be somewhat overrepresented at the expense of very low-income households and, to a lesser extent, very high income households; and (4) a large number of respondents (~90%) are daily Internet users, as might be expected from a primarily online survey.

Relation to Workgroup Materials. Please note that the statistics in this memo may differ slightly from the other Summit read-ahead materials, which relied on unweighted responses that have not been corrected to match the County's demographics.

Survey respondents report a very high quality of life, with only 11% of respondents rating their quality of life in Montgomery County as "Fair" or "Poor."

Overall Quality of Life

Poor
2%

Fair
9%

Excellent
34%

Good
55%

The share of residents who rate the County's Quality of Life as "Good" or "Excellent" increases slightly with age, income, and length of residence, but is largely consistent (with virtually all groups at or above 90%), including across gender, race, and language.

Quality of Life Rating by Race and Ethnicity

	Excellent	Good	Fair	Poor
Asian	34%	57%	9%	
Black	37%	50%	10%	
Hispanic	43%	48%	8%	
White	33%	57%	9%	
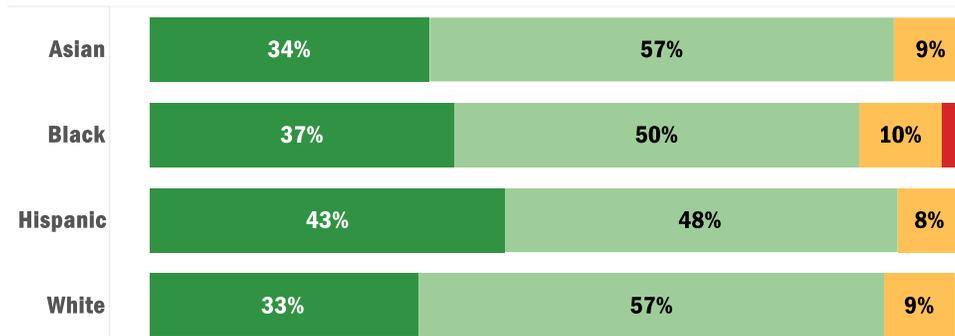
LEGEND: Excellent | Good | Fair | Poor

Quality of Life Rating by Length of Residency in Montgomery County

	Excellent	Good	Poor	Fair
Less than 2 years	21%	74%		3%
2-5 years	36%	56%		7%
6-10 years	45%	40%		11%
11-30 years	34%	55%		10%
More than 30 years	33%	56%		9%
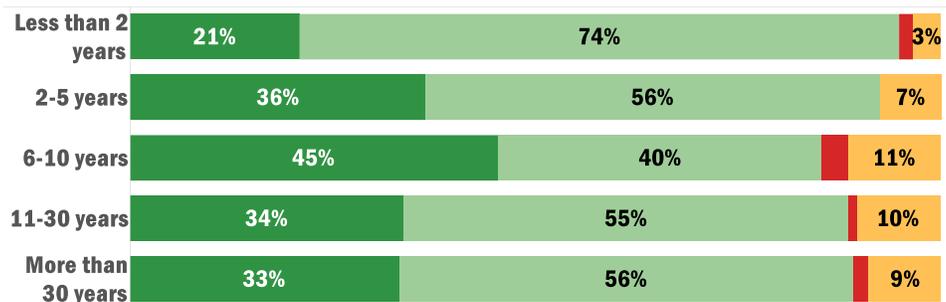
Analysis by zip code, however, shows some variation in the average quality of life score (on a scale of 1-4):

Average Quality of Life Rating by Zip Code

(excluding zip codes with fewer than 15 respondents)

| LEGEND: | < 3.0 | 3.0 | 3.1-3.2 | 3.2 - 3.3 | >3.3 |
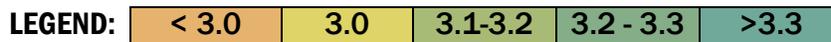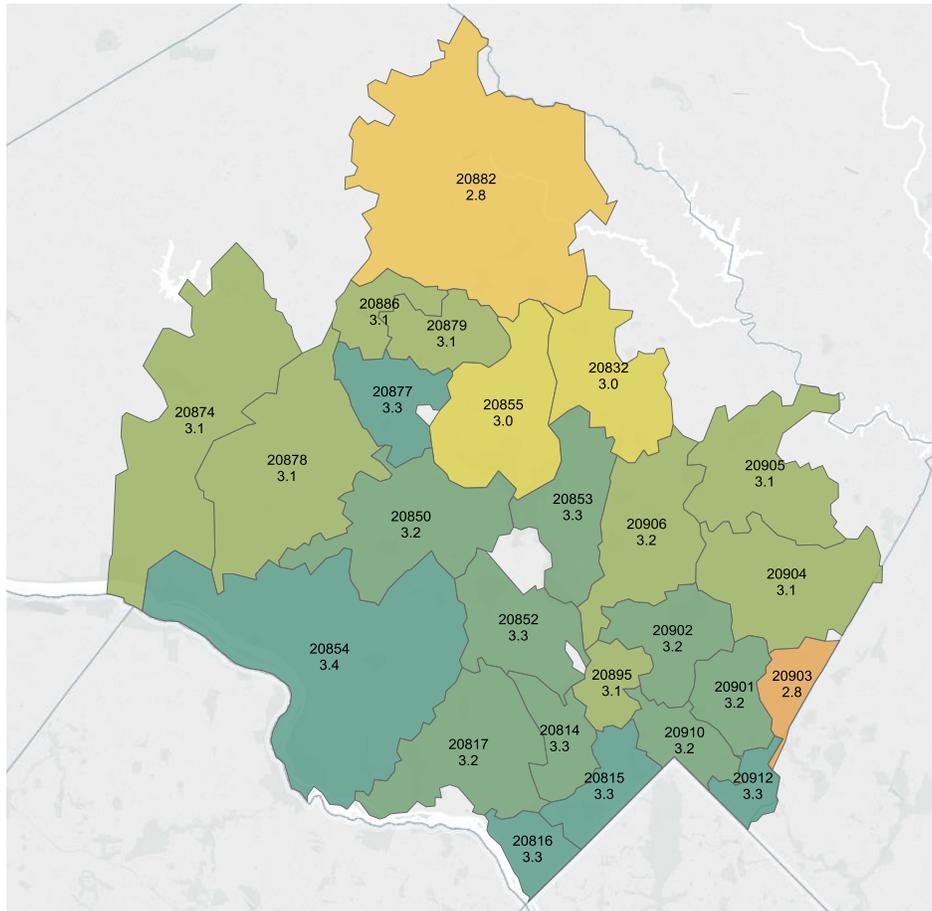
WOULD YOU RECOMMEND MONTGOMERY COUNTY TO A FRIEND AS A GOOD PLACE TO RETIRE?

A lower share of residents (58%), however, would recommend Montgomery County to family or friends as a good place to retire.

Would you recommend Montgomery County as a Good place to Retire?

| 21% | 37% | 20% | 16% | 6% |

DEFINITELY: THE COUNTY IS AN EXCELLENT PLACE TO RETIRE | PROBABLY: THE COUNTY IS A GOOD PLACE TO RETIRE | MAYBE: THE COUNTY IS NEITHER A GOOD NOR BAD PLACE TO RETIRE | PROBABLY NOT: THE COUNTY IS NOT A GOOD PLACE TO RETIRE | DEFINITELY NOT: THE COUNTY IS A BAD PLACE TO RETIRE
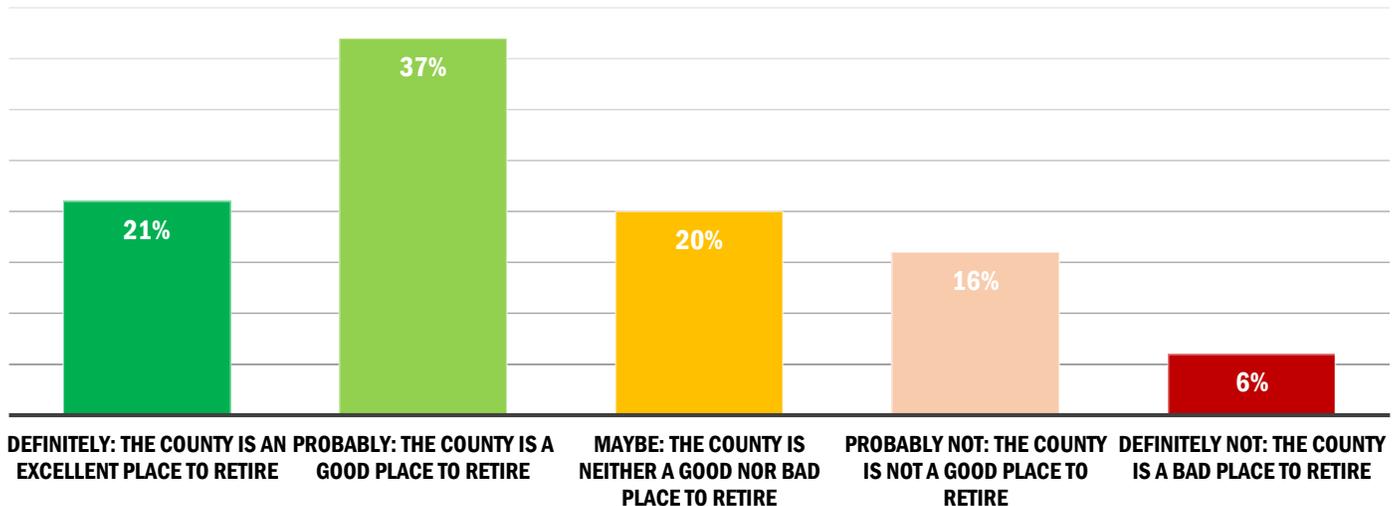
These results appear to be independent of gender or household income. The share of residents who respond "probably not" or "definitely not" decreases with age. The survey also shows differences in the ratings provided on the surveys taken in foreign-languages (with particularly strong responses in Spanish) as well as by race and ethnicity:

Likelihood of Recommending Montgomery County by Race and Ethnicity

	Poor		Fair	Good	Excellent
Asian	4%		17%	48%	29%
Hispanic	6%		19%	29%	44%
Black	6%	18%	11%	32%	33%
White	6%	19%	22%	38%	15%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

LEGEND: Excellent | Good | Fair | Poor

DO YOU PLAN TO CONTINUE TO RESIDE IN MONTGOMERY COUNTY FOR THE LONG-TERM?

The survey also explored whether residents were planning to continue to reside in Montgomery County for the long-term. Only 15% of respondents stated that they were "probably not" or "definitely not" planning to stay in the County. The responses were fairly consistent by gender, length of residence, and income (albeit with slightly more positive responses from those earning less than $20k and between $50k-75k).

Do you Plan to Reside in Montgomery County for the Long-term?

DEFINITELY	PROBABLY	MAYBE	PROBABLY NOT	DEFINITELY NOT
31%	35%	18%	11%	4%
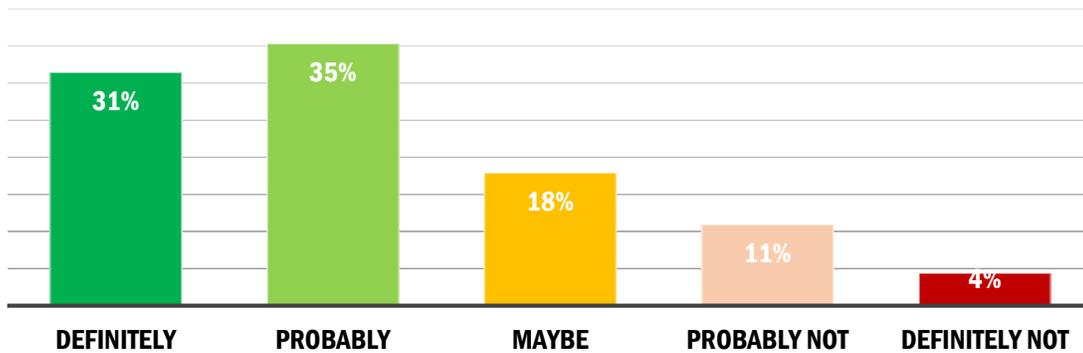
The responses do however differ by language (with the Spanish and Farsi surveys providing particularly strong support) and ethnicity:

Plan to Continue to Reside in the County by Race and Ethnicity

White	27%	37%	18%	12%	5%
Black	33%	35%	19%	10%	
Hispanic	42%	33%	12%	11%	
Asian	44%	33%	16%	7%	

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
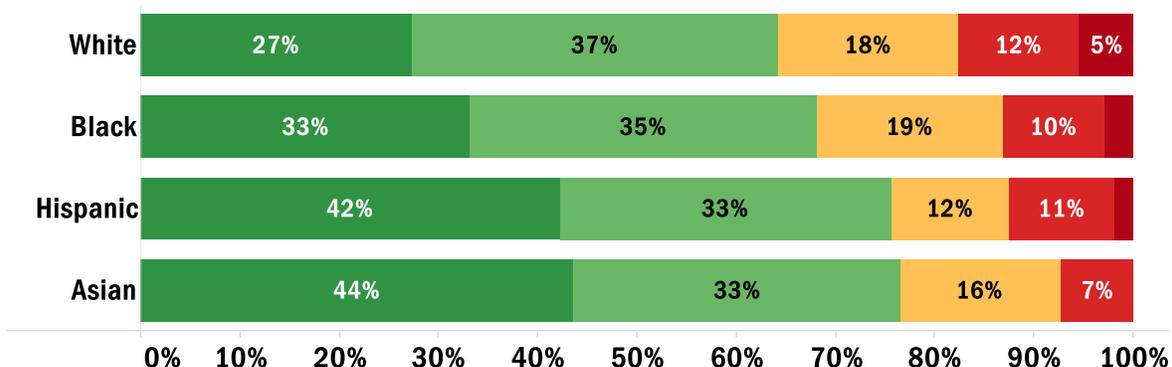
As expected, the numbers also improve significantly with age:

Plan to Continue to Reside in the County by Age Group

Age Group	Definitely	Probably	Maybe	Probably Not	Definitely Not
55-59	21%	35%	20%	17%	8%
60-64	19%	35%	23%	17%	7%
65-69	25%	38%	22%	10%	5%
70-74	36%	38%	17%	8%	
75-79	45%	34%	12%	8%	
80-84	57%	35%	6%		
85 and Over	63%	31%	4%		

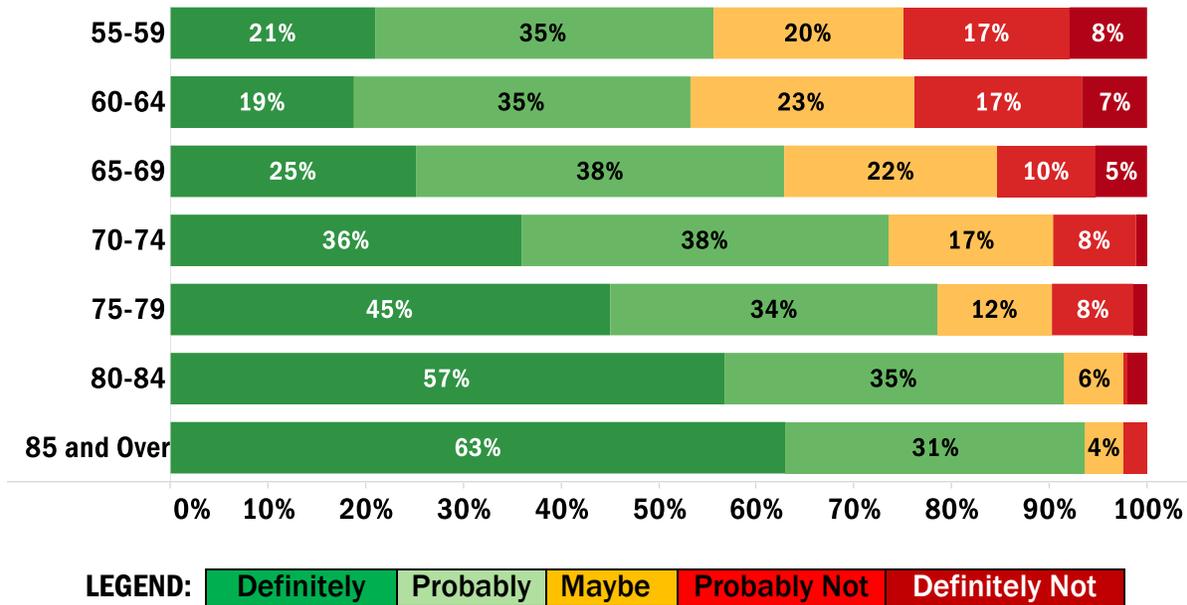**LEGEND:** Definitely | Probably | Maybe | Probably Not | Definitely Not

RATINGS FOR COMMUNITY CHARACTERISTICS

To examine the causes for these different responses, the survey also asked residents to rate Montgomery County on a number of community characteristics. The County scored particularly high for health services, public safety, and parks and activities. The County scores less well for affordable housing, employment opportunities, as well as accessibility for residents with disabilities.

Rating for Community Characteristics

	Excellent	Good	Fair	Poor
AVAILABILITY OF HEALTH SERVICES	45%	46%	8%	2%
PUBLIC SAFETY	42%	47%	8%	2%
PARKS AND OUTDOORS	38%	46%	13%	3%
ACTIVITIES YOU ENJOY	34%	48%	15%	3%
VOLUNTEER OPPORTUNITIES	34%	48%	15%	3%
RESPECT AND INCLUSION	30%	47%	18%	5%
SPORTS, FITNESS, INDOOR ACTIVITIES	28%	49%	20%	3%
OVERALL QUALITY OF SERVICES	21%	49%	23%	7%
ABLE TO GET TO PLACES	25%	43%	24%	8%
ACCESS TO HOMEBASED CARE	21%	46%	25%	7%
ACCESSIBILITY FOR RESIDENTS WITH DISABILITIES	17%	41%	31%	11%
EMPLOYMENT OPPORTUNITIES	15%	41%	33%	12%
AFFORDABLE HOUSING	7%	16%	37%	39%
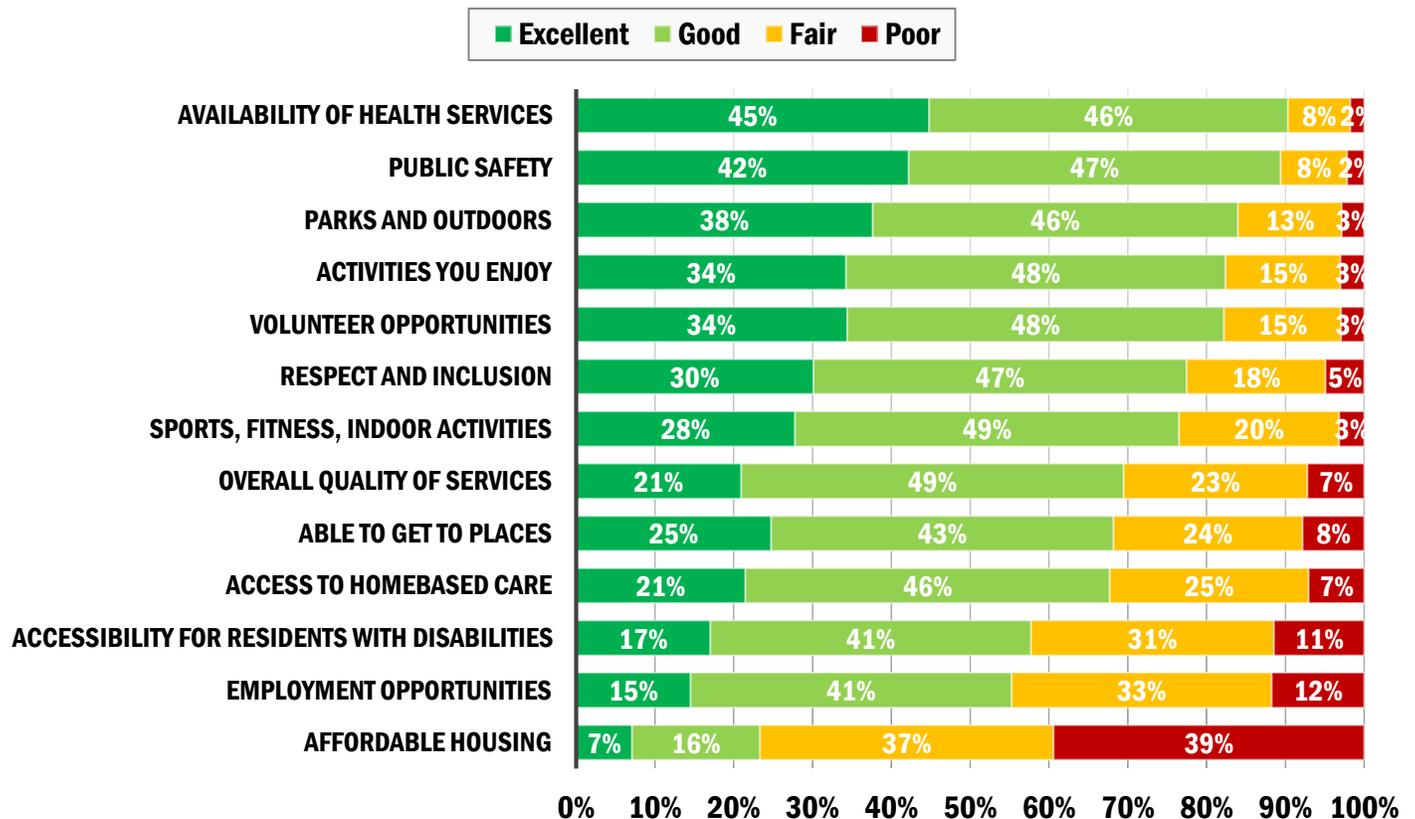
To explore concerns about the cost of living, the survey also asked respondents whether they felt like they had the ability to afford a good quality of life in their older years or into retirement. Despite Montgomery County's relative high median household income, including among seniors, 69% of respondents are at least somewhat concerned about their ability to afford a good quality of life in retirement.
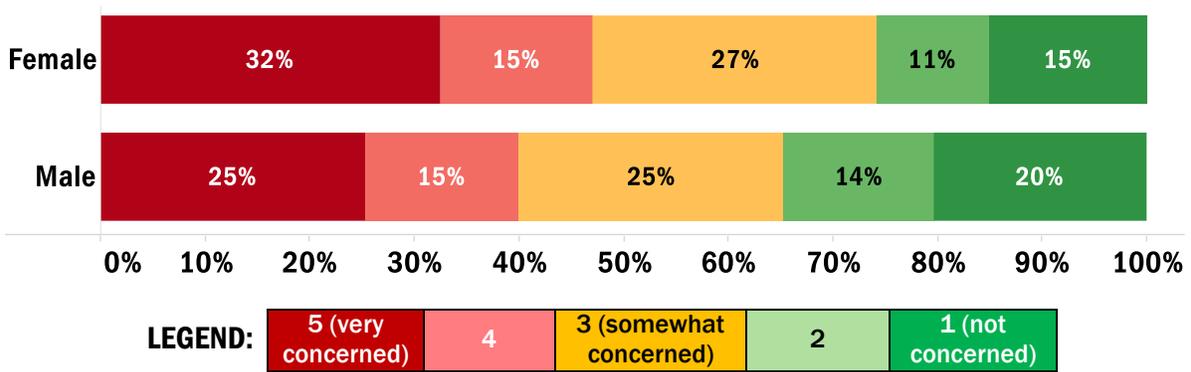
How Concerned are You about Your Ability to Afford a Good Quality of Life in Retirement (65+)?

1 (NOT CONCERNED)	2	3 (SOMEWHAT CONCERNED)	4	5 (VERY CONCERNED)
17%	12%	26%	15%	29%
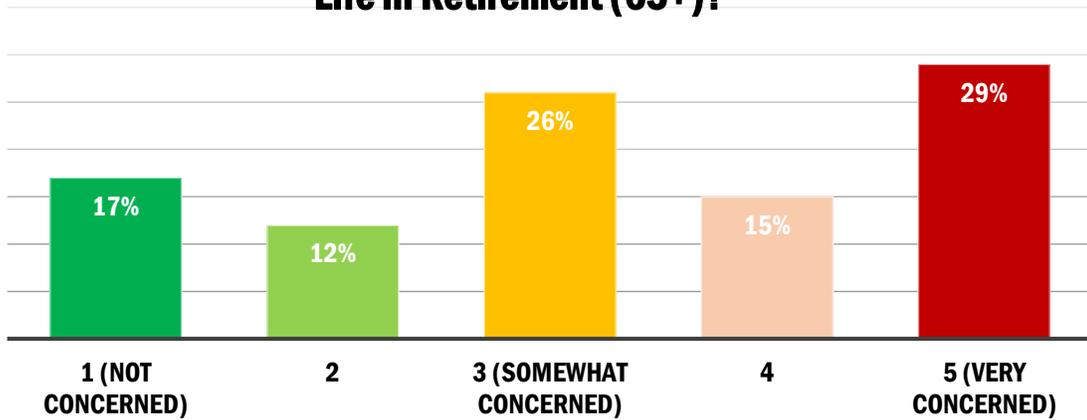
The rate of concern is notably higher among women:

Concern about Ability to Afford a Good Quality of Life by Gender

	5 (very concerned)	4	3 (somewhat concerned)	2	1 (not concerned)
Female	32%	15%	27%	11%	15%
Male	25%	15%	25%	14%	20%

LEGEND:

5 (very concerned)	4	3 (somewhat concerned)	2	1 (not concerned)

The rate of concern is lowest among White residents (24% very concerned) and highest among Black residents (44%). Hispanic respondents (39%) and Asian respondents (37%) fall in the middle. But perhaps most noteworthy is that concerns for the cost of living are strongly correlated with whether residents plan to stay in the County in the long-term:

Concern about Ability to Afford a Good Quality of Life by Plans to Stay in the County Long-term

	5 (very concerned)	4	3 (somewhat concerned)	2	1 (not concerned)
Definitely	21%	9%	25%	13%	32%
Probably	22%	17%	33%	15%	13%
Maybe	32%	22%	25%	11%	10%
Probably not	54%	11%	20%	7%	8%
Definitely not	74%	10%	6%	9%	

Survey respondents were also given the opportunity to provide open-ended, written responses, resulting in over 200 pages of feedback, covering more than 4,000 individual comments. The County will systematically evaluate these comments over the coming weeks to help shape the County's senior strategy. The "word clouds" below provide a high-level summary of the responses received to date.

WHAT DO YOU LIKE BEST ABOUT LIVING IN MONTGOMERY COUNTY?

Respondents value the County's diversity, public services, parks, cultural opportunities, and proximity to DC:

IN WHAT AREAS CAN WE MOST IMPROVE?

However, respondents are concerned about the cost of housing, traffic and transportation, taxes, and urban development:

CountyStat also conducted an automated "sentiment analysis" of the comments received to date to help identify the topics that received the most positive and negative comments (using a tool called NVivo). This analysis indicates that residents are highly appreciative of their neighborhoods, senior programs, and parks, but concerned about the county's traffic, taxes, and cost of living.

Sentiment Analysis: 15 Themes

■ Very Positive ■ Moderately Positive ■ Moderately Negative ■ Very Negative

Theme	Very Positive	Moderately Positive	Moderately Negative	Very Negative
NEIGHBORHOOD	13%	63%	9%	16%
PROGRAMS	9%	56%	28%	6%
SERVICES	10%	55%	19%	15%
PARKS	7%	57%	14%	21%
SCHOOLS	7%	55%	27%	11%
COMMUNITY	10%	49%	23%	18%
PEOPLE	3%	53%	33%	11%
HOUSING	9%	43%	33%	15%
CENTERS	12%	38%	27%	23%
WALKING	8%	42%	21%	29%
PUBLIC TRANSPORTATION	7%	33%	36%	24%
ROADS	11%	27%	38%	24%
INCOME	5%	32%	37%	26%
TAXES / PROPERTY TAXES	4%	23%	53%	20%
TRAFFIC	3%	9%	54%	33%