



Montgomery Planning Design, Placemaking & Policy Division

09/11/2025

Agenda item 08

Housing Needs Assessment and Housing Preferences Survey Scopes of Work

Agenda

- Introduction and Context
- Overview of the Housing Preferences Survey Scope of Work
- Overview of Housing Needs Assessment Scope of Work
- Questions
- Vote on Approval of both Scopes of Work

Context

2018-2020

The 2020 Housing Needs Assessment used 2018 data and no longer reflects current conditions.



2020

COVID-19 and economic shifts have changed household needs, affordability, and displacement risks.



2022

The adoption of *Thrive 2050* established a long-term vision for equitable, sustainable housing growth and emphasizes the need for updated data and implementation tools.



2025-2026

An updated Housing Needs Assessment and a Housing Preferences Survey will look at current conditions and ahead to 2050 to identify housing needs in the county and understand how residents think about housing choices, tradeoffs, and priorities.



Overview

A macro-level analysis
using existing data
sources to identify
broad market trends in
housing at the
countywide and smaller

**Housing Needs
Assessment**



A micro-level analysis
using primary data
collection to identify the
types, sizes, and
amounts of housing that
residents want to see in

**Housing
Preferences
Survey**



Housing Preferences Survey

Roles and Responsibilities



External Consultant: Develop survey instrument, create representative sampling plan, administer data collection, conduct data analysis, and produce comprehensive report of the survey findings



Planning Staff: Manage the consultant, provide technical support as needed, hold check-in meetings

Survey Objectives



Gather a representative and statistically significant sample of county residents



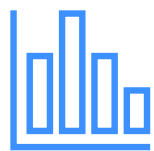
Collect data on housing preferences, priorities, needs, concerns, and challenges



Document top housing preferences at the countywide level, and across sub-geographies and demographic groups



Describe implications of the findings for meeting the housing need in the county



Create a detailed report with informative graphics with the county's top housing preferences



Raise awareness about the facts, data, and findings using clear communications strategies

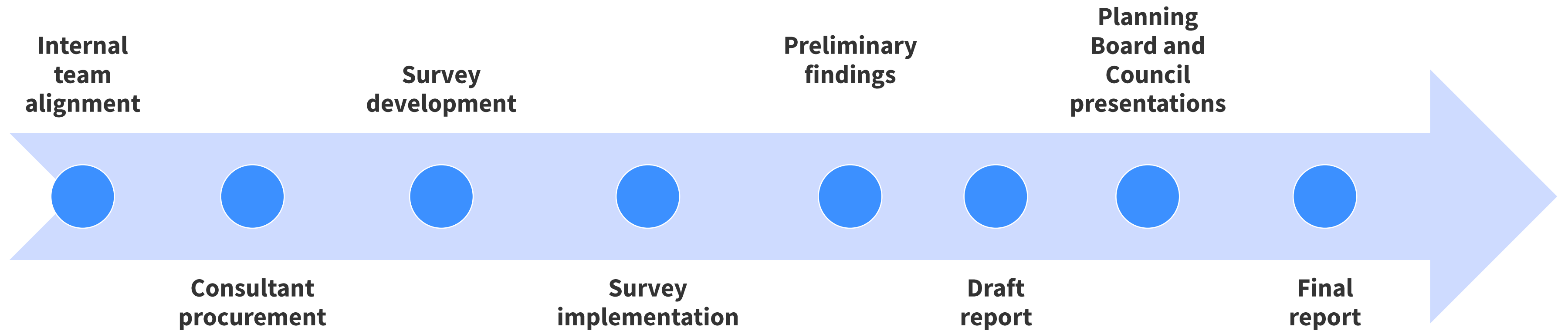
Survey Topics

Demographics	Age, gender, income, race/ethnicity, household size, housing tenure, length of residence in current house
Satisfaction with current housing	Likes and dislikes of current housing
Neighborhood preferences and priorities	Location, safety, environment, community, public amenities, transportation
Housing type and characteristic preferences	Unit/building type, unit size, amenities, age
Housing affordability	Current cost burden, willingness to pay, future financial concerns
Housing challenges	Availability, affordability, safety, amenities, walkability
Plans for future housing	Aging in place, barriers and motivators for moving
Housing policy	In favor of or opposed to specific housing policies

Deliverables

- 1 A comprehensive report that outlines survey approach and methodology, findings, and potential policy implications.
- 2 Summary materials such as one-pagers with informative data visualizations for broader audiences.
- 3 A slide deck for the presentation of the survey findings.

Timeline

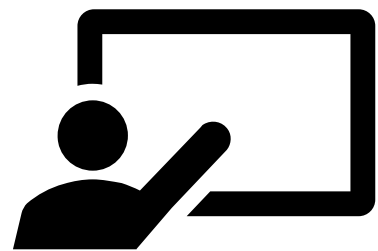


Housing Needs Assessment

Roles and Responsibilities



Planning Staff: Responsible for the bulk of the data collection and analysis in the report, including the analysis of current housing conditions and trends and the housing gap analysis.

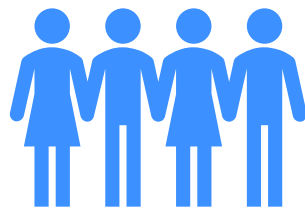


External Consultant: Responsible for projections of future housing demand and identification of potential economic indicators that will impact future housing demand.

Objectives



Use data-driven analysis to better understand how well Montgomery County's housing system is serving current residents and how it needs to evolve to meet future demand.



Highlight disparities in housing access across geography and populations, including cost burden, overcrowding, and homelessness.



Inform future policy, investment, and planning decisions to better align housing stock with the county's policy goals and the lay the groundwork for a potential Housing Functional Plan.

Key Elements

Analysis of Current Housing Conditions and Trends

- Map out who lives in the county, where, and in what kind of housing—by type, size, age, tenure, and condition.

Housing Gap Analysis

- Compare what housing exists to what households can afford or need, surfacing the biggest mismatches.

Projections of Future Housing Demand

- Work with NCSG to estimate future housing needs through 2050, using regional forecasts and local trends.

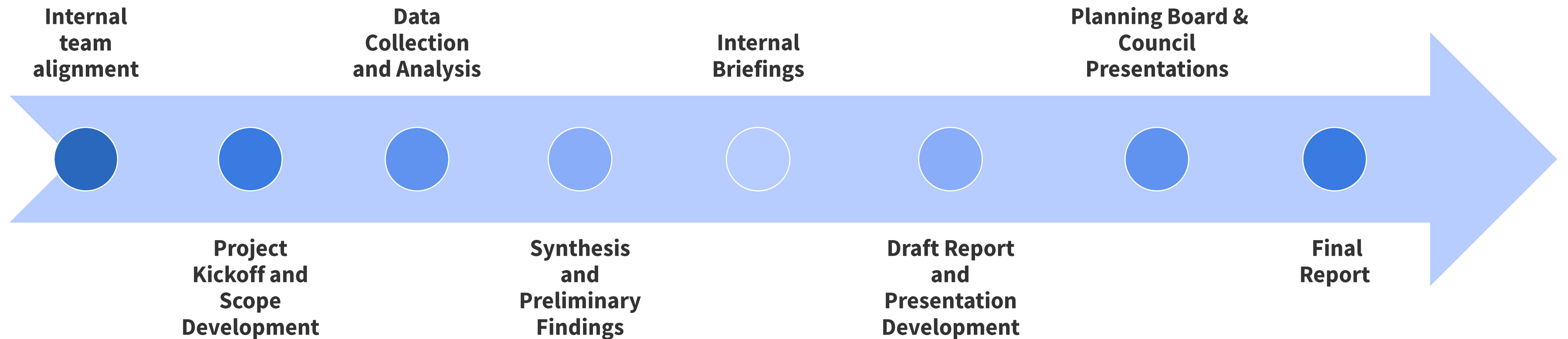
Methodology

- **Current Housing Conditions:** Demographic and housing indicators will be analyzed using cross-tabulations, mapping, and time-series comparisons to understand who lives in the county, where, and in what types of housing.
- **Housing Gap Analysis:** The gap analysis will compare the number of housing units available at different price points to the number of households who can afford them, identifying where the housing stock does not meet demand. Planning Staff will assess past County gap studies and national methodologies to select the best fit for estimating shortfalls in units by income, size, and tenure, adjusting household income and size.
- **Future Housing Demand:** NCSG will use regional growth forecasts and past data trends to estimate how income, household size, age, tenure, and housing type are likely to influence future demand— adjusted based on how these factors have shaped demand in the past.

Deliverables

- 1 A comprehensive document with analysis, charts, maps, and findings.
- 2 Summary materials such as fact sheets, one-pagers, or dashboards for broader audiences.
- 3 Slide deck for the presentation of results and analysis.

Timeline



Questions & Discussion