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Population Characteristics

Resident Population, Age, and Demographics

The population has grown slightly across the region

Both counties are, on average, older and Whiter than Philadelphia, but still contain a diverse population

	Delaware	Montgomery	Philadelphia
Total Population (2022)	575,312	856,399	1,593,208
5-Year Change	+2.1%	+4.6%	+1.5%
Age			
Under 5	6%	5%	6%
5 to 9	6%	6%	6%
10 to 14	7%	6%	6%
15 to 23	10%	10%	11%
24 to 35	16%	15%	22%
36 to 49	18%	18%	17%
50 to 63	19%	20%	16%
64 or older	18%	19%	15%
Race and Ethnicity			
Asian/PI	6%	8%	8%
Black	22%	9%	39%
Hispanic	4%	6%	16%
Other	4%	4%	4%
White	64%	74%	33%

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Resident Population, Age, and Demographics

Seniors are the fastest growing age group across the region.

Percentage Change in Population by Age	Delaware	Montgomery	Philadelphia
Under 5	-2%	-2%	-9%
5 to 9	+4%	+2%	+3%
10 to 14	+1%	+4%	+5%
15 to 23	-2%	+6%	-7%
24 to 35	+4%	+5%	+3%
36 to 49	+2%	+3%	+4%
50 to 63	-3%	+1%	-2%
64 or older	+11%	+14%	+11%

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Types of Households Living Across the County

The most common types of households in Delaware and Montgomery Counties were Married Couples with Children (~30%) and Older Couples without Children and Seniors who lived alone.

	Delaware	Montgomery	Philadelphia
Total Households	215,833	329,680	659,129
Types of Households			
Single Individuals (<50). Individuals living alone under 50.	9%	8%	16%
Younger Couples. Spouses under 50 without children.	6%	7%	8%
Single Parents. Single adult living with children.	11%	8%	14%
Married with Children. Spouses living with children in the same home.	27%	30%	16%
Older Couples. Spouses over 50 without children.	16%	20%	9%
Single Seniors (>50). Individuals living alone over 50.	21%	19%	21%
Multi-Generational Households. 3+ generations living together.	5%	3%	5%
All Others. Roommates, other unrelated individuals living together.	6%	5%	11%

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Language Diversity Among Residents

Twelve to fourteen percent of residents in Delaware and Montgomery Counties spoke a language other than English at Home.

The most common languages were Spanish, Hindi, and Chinese.

Home Languages (Population Over 5)	Delaware	Montgomery	Philadelphia
English	88%	86%	75%
Spanish	3%	4%	11%
Hindi and related	2%	2%	1%
Chinese	1%	1%	3%
Korean	0%	1%	0%
Dravidian	1%	1%	1%
All Others	1%	1%	2%
French	1%	1%	1%
Vietnamese	1%	1%	1%
Italian	0%	1%	0%
Russian	0%	0%	1%
Arabic	0%	0%	1%
German	0%	0%	0%
Filipino, Tagalog	0%	0%	0%
Sub-Saharan Africa	1%	0%	1%
All Others	1%	1%	1%

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Resident Income and Education Levels

Both counties are, on average, higher income, but a quarter to a third of residents earn less than $50k per year

Education levels were highest in Montgomery County

	Delaware	Montgomery	Philadelphia
Household Income			
Under $25k	14%	10%	25%
$25k to $50k	17%	13%	20%
$50k to $100k	25%	25%	27%
$100k to $150k	18%	19%	13%
$150k to $250k	16%	20%	9%
Over $250k	10%	14%	5%
Median Income	$86,390	$107,441	$57,537
Education Levels (Adults 24+)			
High School or Less	34%	27%	43%
Some College or AA	26%	21%	23%
Bachelor's Degree	24%	30%	19%
Graduate or Higher	17%	22%	15%

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Top Employment Sectors

There are some mismatches between the sectors that residents work in and the kinds of employers that are located in each county. For example, while Finance & Insurance is one of the five most common industries for workers who live in Delaware County, there are more Finance & Insurance jobs in Montgomery County. These differences highlight how workers commute across the region for employment.

Most Workers Across the Region Work in the Same Four Industries

Top Employment Sectors for Residents, by County

	Delaware	Montgomery	Philadelphia
1	Healthcare	Healthcare	Healthcare
2	Sci., Tech., Info. Services	Sci., Tech., Info. Services	Sci., Tech., Info. Services
3	Education	Retail Trade	Education
4	Retail Trade	Education	Retail Trade
5	Finance, Insurance	Manufacturing	Admin. and Support Services

The Largest Employers in Each County Show More Diversity

Top Employment Sector for Workers, by County

	Delaware	Montgomery	Philadelphia
1	Healthcare	Sci., Tech., Info. Services	Healthcare
2	Education	Healthcare	Sci., Tech., Info. Services
3	Retail Trade	Retail Trade	Education
4	Admin. and Support Services	Manufacturing	Retail Trade
5	Manufacturing	Finance, Insurance	Government

Where do Residents in Top Industries Work?

Across the most common industries, most residents worked in their home counties, but Montgomery County residents were more likely to work in their home county than Delaware County residents.

Generally, Delaware County residents that didn't work in Delaware County worked in Montgomery or Philadelphia Counties. Just 10-20% worked outside of the region.

Delaware County

	Work in Home County	Work Elsewhere in Region	Work Outside of Region
Healthcare	53%	34%	13%
Sci., Tech., Info. Services	54%	32%	14%
Education	56%	30%	13%
Retail Trade	64%	20%	16%
Finance, Insurance	52%	24%	25%
Manufacturing	59%	19%	21%
All Other Industries	**56%**	**28%**	**15%**

Montgomery County

|	Work in Home County	Work Elsewhere in Region	Work Outside of Region
Healthcare	60%	20%	20%
Sci., Tech., Info. Services	72%	13%	16%
Education	62%	24%	14%
Retail Trade	72%	7%	21%
Finance, Insurance	73%	9%	18%
Manufacturing	74%	6%	20%
All Other Industries	**68%**	**14%**	**18%**

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Job and Commuter Flows

Across both Delaware and Montgomery Counties, most residents are employed in jobs outside of their home county and most of the jobs in each county are filled by residents who live somewhere else.

Job Flows in Delaware and Montgomery County
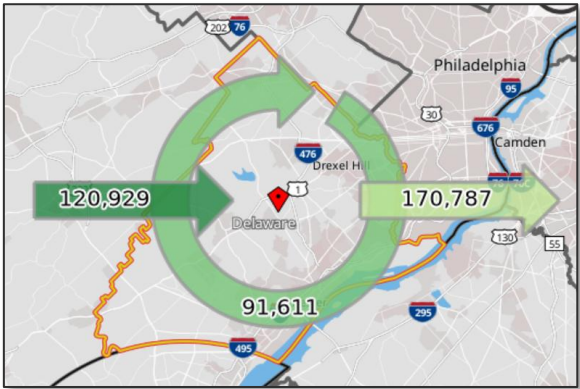
Workers Commuting **INTO** Delaware County for Jobs	120,929
Workers Commuting **WITHIN** Delaware County for Jobs	91,661
Workers Commuting **OUT OF** Delaware County for Jobs	170,787
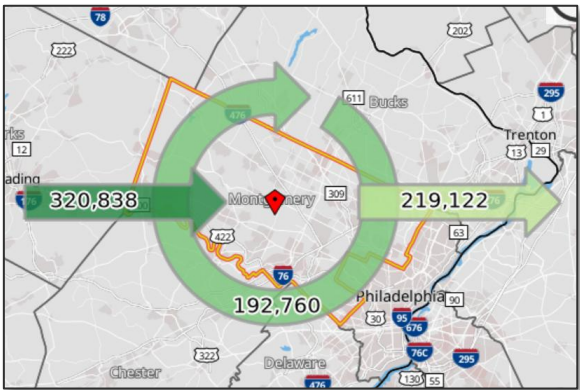
Workers Commuting **INTO** Montgomery County for Jobs	320,838
Workers Commuting **WITHIN** Montgomery County for Jobs	192,760
Workers Commuting **OUT OF** Montgomery County for Jobs	219,122

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Characteristics of Workers in Top Industries

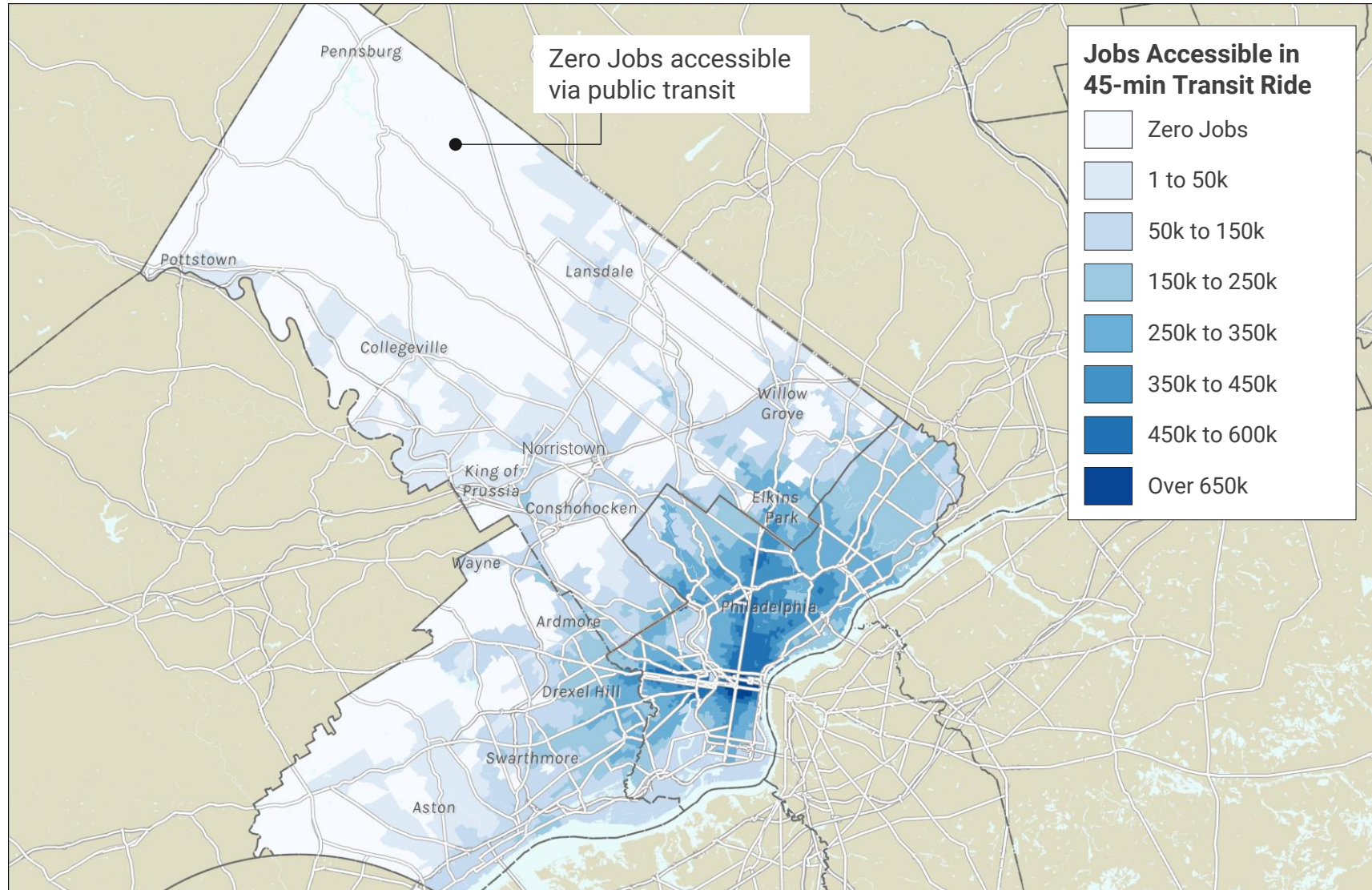|	Delaware County						Montgomery County					
	Healthcare	Science, Tech, Info Services	Education	Retail Trade	Finance, Insurance	All Employees	Healthcare	Science, Tech, Info Services	Retail Trade	Education	Manuf.	All Employees
Wage/Income												
Under $25k	6%	1%	4%	5%	1%	4%	3%	1%	5%	2%	1%	2%
$25k to $50k	13%	5%	8%	13%	4%	10%	6%	4%	11%	5%	4%	6%
$50k to $100k	26%	18%	24%	29%	14%	24%	22%	14%	29%	17%	19%	22%
$100k to $150k	22%	21%	21%	22%	21%	22%	22%	20%	22%	25%	24%	22%
$150k to $250k	21%	27%	27%	23%	31%	25%	28%	32%	22%	30%	29%	28%
Over $250k	12%	27%	17%	8%	29%	15%	19%	29%	11%	20%	23%	19%
Education Levels												
High School or Less	23%	10%	14%	43%	12%	29%	16%	7%	39%	10%	26%	24%
Some College or AA	32%	20%	12%	35%	18%	27%	25%	15%	31%	10%	19%	22%
Bachelor's Degree	23%	40%	28%	18%	43%	26%	29%	47%	23%	28%	34%	32%
Graduate or Higher	21%	30%	46%	4%	27%	18%	30%	32%	7%	53%	21%	23%

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Transportation and Commuting

Jobs Accessible by Public Transit

Outside of Philadelphia, Public Transit Access to Job Centers is Limited

This map shows the number of jobs accessible via a 45-minute public transit ride from each block group.

Zero Jobs accessible via public transit

Jobs Accessible in 45-min Transit Ride

- Zero Jobs
- 1 to 50k
- 50k to 150k
- 150k to 250k
- 250k to 350k
- 350k to 450k
- 450k to 600k
- Over 650k

Resident Car Ownership and Job Commutes

Car Ownership is high across the region

Driving was by far the most common mode of transportation, but Working from Home was also common across the region

	Delaware	Montgomery	Philadelphia
Car Ownership			
Own 0 Cars	4%	2%	17%
Own 1 Car	23%	17%	42%
Own 2+ Cars	72%	81%	41%
Commute Mode			
Drive	74%	75%	55%
Public Transport	8%	3%	19%
Work From Home	13%	18%	14%
Other Mode	5%	4%	13%

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Travel and Depart Times for Workers

Most residents have commutes under a half hour

13% - 14% of Delaware and Montgomery residents work an Early or Late Night Shift

	Delaware	Montgomery	Philadelphia
Commute Time			
Under 15 minutes	32%	38%	27%
15 to 30 minutes	29%	26%	27%
30 to 45 minutes	22%	19%	24%
Over 45 minutes	17%	17%	22%
Work Departure Time			
Early Shift (Before 6am)	10%	11%	10%
Trad. Shift (6am – 9am)	65%	67%	61%
Afternoon Shift (9am – 3pm)	16%	15%	19%
Evening Shift (3pm – 6pm)	5%	4%	5%
Night Shift (After 6pm)	4%	2%	5%

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Commuting Characteristics and Resident Incomes

Car Ownership is lower among Low Income Households

Commuting Modes were similar across income levels

Commute Times are similar across income levels

	Below $50k	$50k to $100k	$100k to $150k	Over $150k
Car Ownership				
Own 0 Cars	26%	12%	5%	3%
Own 1 Car	50%	41%	25%	16%
Own 2+ Cars	24%	47%	70%	81%
Commute Mode				
Drive	57%	65%	69%	65%
Public Transport	20%	14%	10%	8%
Work From Home	9%	11%	15%	21%
Other Mode	14%	9%	7%	6%
Commute Time				
Under 15 minutes	30%	28%	31%	36%
15 to 30 minutes	28%	28%	27%	26%
30 to 45 minutes	21%	23%	23%	21%
Over 45 minutes	21%	21%	19%	18%

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15

Commuting Times and Transportation Mode

It takes Public Transit users much longer, on average, to travel to work than Drivers

Public Transit users and Drivers leave for work around the same time

Commute Time	Drive to Work	Public Transit to Work
Under 15 minutes	24%	3%
15 to 30 minutes	37%	14%
30 to 45 minutes	22%	23%
Over 45 minutes	18%	59%

	Drive to Work	Public Transit to Work
Early Shift (Before 6am)	13%	11%
Trad. Shift (6am – 9am)	64%	67%
Afternoon Shift (9am – 3pm)	15%	15%
Evening Shift (3pm – 6pm)	5%	3%
Night Shift (After 6pm)	4%	3%

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16

Cost of Travel

	Average Annual Expenses (2021-2022)	Share of Pre-Tax Income (2021-2022)
Vehicle purchases (net outlay)	$3,877	3.60%
Gasoline, other fuels, and motor oil	$2,368	2.20%
Other vehicle expenses	$3,805	3.53%
Public and other transportation	$1,197	1.11%
Total Transportation	**$11,247**	**10.44%**

According to the most recent data available, Philadelphia households spend about $12,000 a year on transportation, which makes up just over 10% of their budget, on average.

	Average Annual Expenses (2021-2022)	Share of Pre-Tax Income (2021-2022)
Below $50,000	$5,493	21.66%
$50,000 to $100,000	$9,610	13.30%
$100,000 to $150,000	$13,860	11.33%
Over $150,000	$19,956	7.60%
Total Transportation	**$11,247**	**10.44%**

Lower-income households spend much more of their budgets on transportation. We estimate households that earn less than $50k/year spend over 20% of their income on transportation.

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Cost of Driving to Work

Census information about commute times and national car ownership cost data allow us to estimate the cost of an individual's weekly driving commute.

National Car Ownership Costs, Per Mile Driven

	Avg. Cost
Ownership Costs (e.g., Insur., Regis., Financing)	$0.44 per mile
Operation Costs (e.g., Gas, Tolls)	$0.28 per mile
Total Vehicle Costs	**$0.72 per mile**

Average Annual Commuting Costs for Workers that Drive to Work by Income Level

	Delaware Drivers			Montgomery Drivers			Philadelphia Drivers		
	Avg Annual Trip Cost	Avg Income	Share Income	Avg Annual Trip Cost	Avg Income	Share Income	Avg Annual Trip Cost	Avg Income	Share Income
Under $50k	$3,932	$27,043	15%	$3,852	$25,174	15%	$4,648	$23,976	19%
$50k to $100k	$4,242	$45,214	9%	$4,138	$47,124	9%	$4,877	$46,576	10%
$100k to $150k	$4,392	$63,071	7%	$4,359	$63,772	7%	$4,849	$61,807	8%
Over $150k	$4,314	$122,411	4%	$4,526	$127,409	4%	$5,053	$117,068	4%

Formula for calculating commuting cost

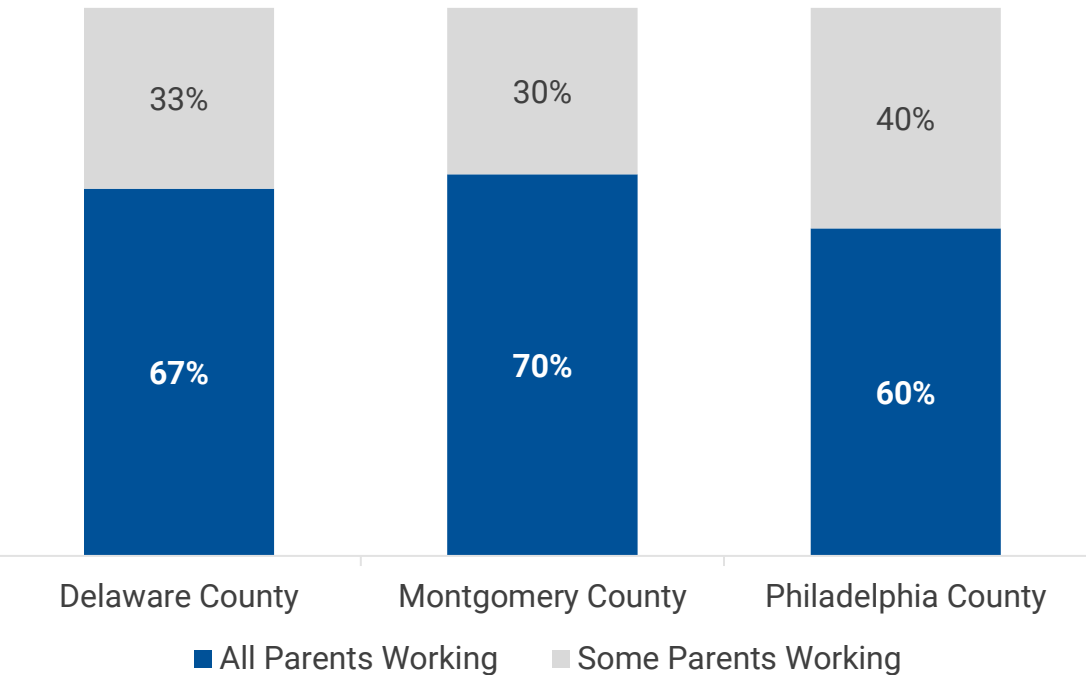| Commute Time	Travel Distance (Speed of 25mph)	Car Cost Per Mile	Cost of One-Way Trip	Trips Per Week	*Cost of Weekly Commute*
15 minutes	6 miles	$0.72	$4.50	10	*$45*
30 minutes	13 miles	$0.72	$9.00	10	*$90*
45 minutes	19 miles	$0.72	$13.50	10	*$135*
60 minutes	25 miles	$0.72	$18.00	10	*$180*

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Families and Children

Children in Delaware, Montgomery, and Philadelphia Counties

Most Families in the Region Will Need Some Form of Non-Parental Childcare

Sixty to Seventy Percent of Children Under Five in the Region Live in Homes Where All of their Parents Are Employed

Parental Employment Among Households with Children Under Five, 2022

Delaware County: 33% Some Parents Working, 67% All Parents Working
Montgomery County: 30% Some Parents Working, 70% All Parents Working
Philadelphia County: 40% Some Parents Working, 60% All Parents Working

■ All Parents Working   ■ Some Parents Working

Factors Such as When, Where, and How Far Parents Travel for Work All Influence The Types of Care Families Use

Selected Employment Characteristics of Parents with Children Under Five, 2022

	Delaware County	Montgomery County	Philadelphia County
Share of Children with 1+ Parent(s) Working Non-Trad. Hours	23%	23%	23%
Share of Children with 1+ Parent(s) Traveling Over 45 minutes to Work	14%	15%	13%
Share of Children with 1+ Parent(s) Working Fully Remote	18%	25%	12%
Share of Children Where 1+ Parent(s) Does Not Speak English at Home	21%	23%	36%

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Children in Delaware, Montgomery, and Philadelphia Counties

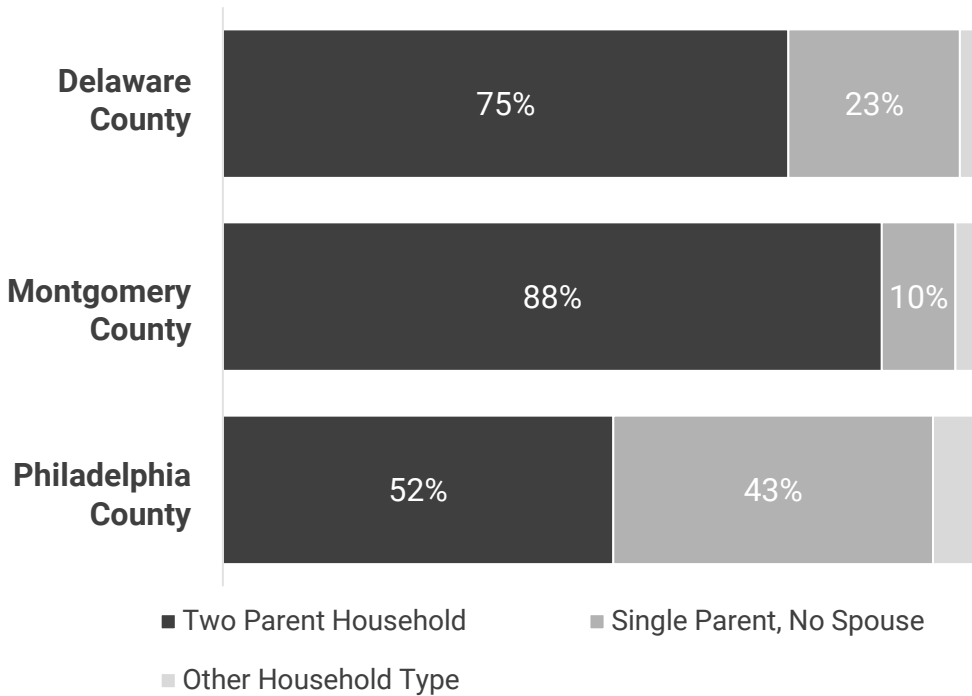*Over 158,000 Children Under Five Live in Delaware, Montgomery, and Philadelphia Counties*

The Demographics of Children Vary Substantially Across the Region

Demographics of Children Under Five in Delaware, Montgomery, and Philadelphia Counties

	Delaware County Children Under Five	Montgomery County Children Under Five	Philadelphia County Children Under Five
Non-Hispanic, White	51%	64%	24%
Hispanic	9%	10%	24%
Non-Hispanic, Black	24%	8%	37%
Non-Hispanic, Asian	5%	8%	6%
Other Race/Ethnicity	11%	10%	9%
Total	**100%**	**100%**	**100%**

Most Children Live with Two Parents, But Sizable Shares in Philadelphia and Delaware Counties Live with Just One Parent

*Composition of Households with Children Under Five in Delaware, Montgomery, and Philadelphia Counties, 2022*

Delaware County: Two Parent Household 75%, Single Parent, No Spouse 23%

Montgomery County: Two Parent Household 88%, Single Parent, No Spouse 10%

Philadelphia County: Two Parent Household 52%, Single Parent, No Spouse 43%

■ Two Parent Household ■ Single Parent, No Spouse
■ Other Household Type

Children Across the Region

The Number of Young Children (Ages Zero to Five) in the Region has Been Flat or Declining Across All Three Counties

Population Under Five by County, 2018 to 2024
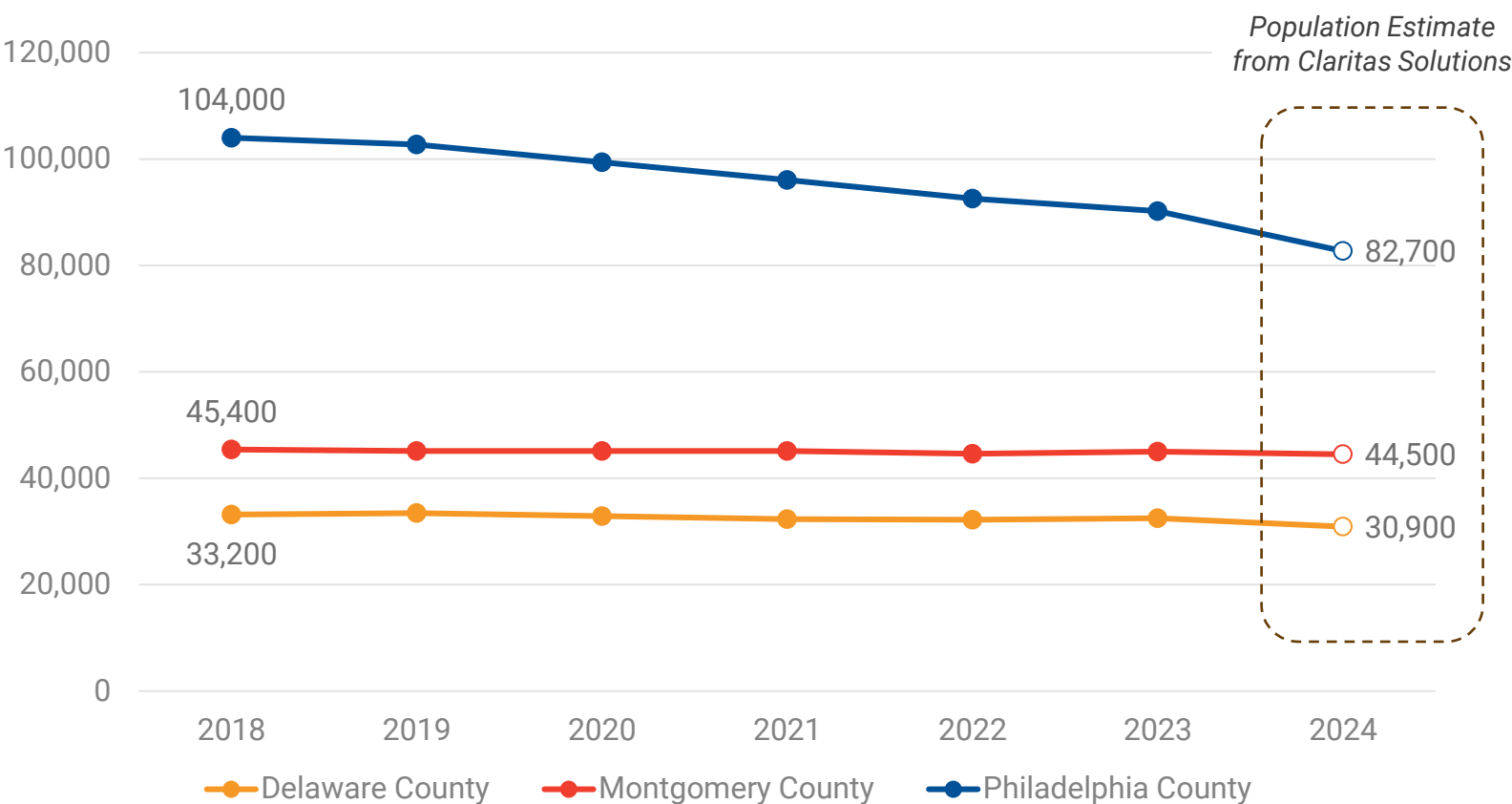
Population Estimate from Claritas Solutions

Legend: ● Delaware County ● Montgomery County ● Philadelphia County

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Providers and Total Supply

Who are the operators that provide full-time childcare across Philadelphia, Delaware, and Montgomery Counties?

Mapping Demand for Childcare

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This map illustrates estimated demand within a half mile of each census block group across the region.

	Population Under Five	Commuter Adjustment	Estimated Demand
Delaware	30,900	-1,700	29,200
Montgomery	44,500	+1,315	45,800
Philadelphia	82,700	+2,400	85,164
Region Total	**158,100**	**+2,000**	**160,100**

Maximum Potential Demand for Childcare
Children Under Five, 2024

Lowest Demand

Highest Demand

Delaware County Childcare Providers
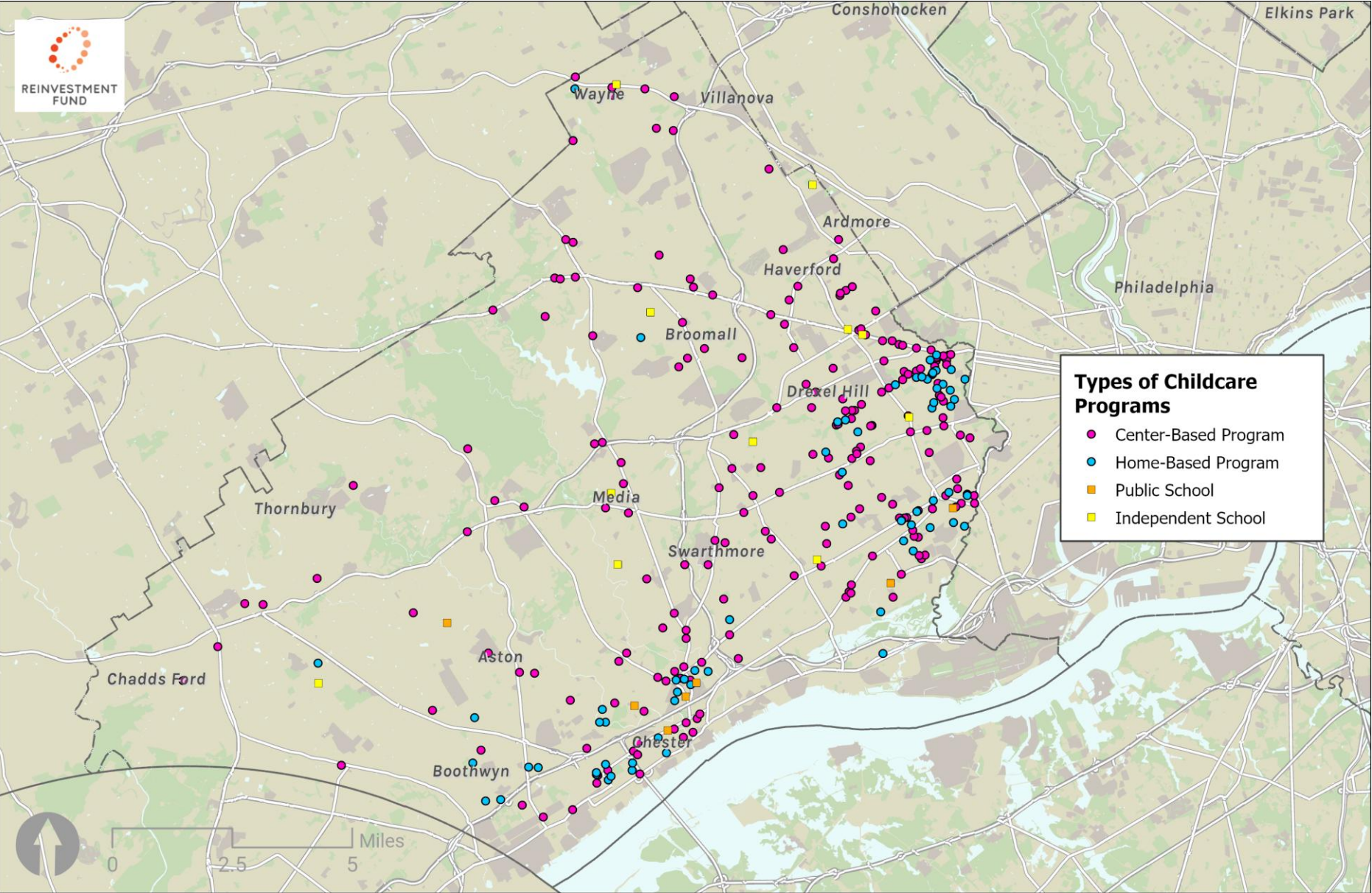
	# of Sites
Center-Based	219
Home-Based	70
School-Based (Public)	7
School-Based (Indep.)	12

Types of Childcare Programs

- ● Center-Based Program
- ● Home-Based Program
- ■ Public School
- ■ Independent School

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Montgomery County Childcare Providers
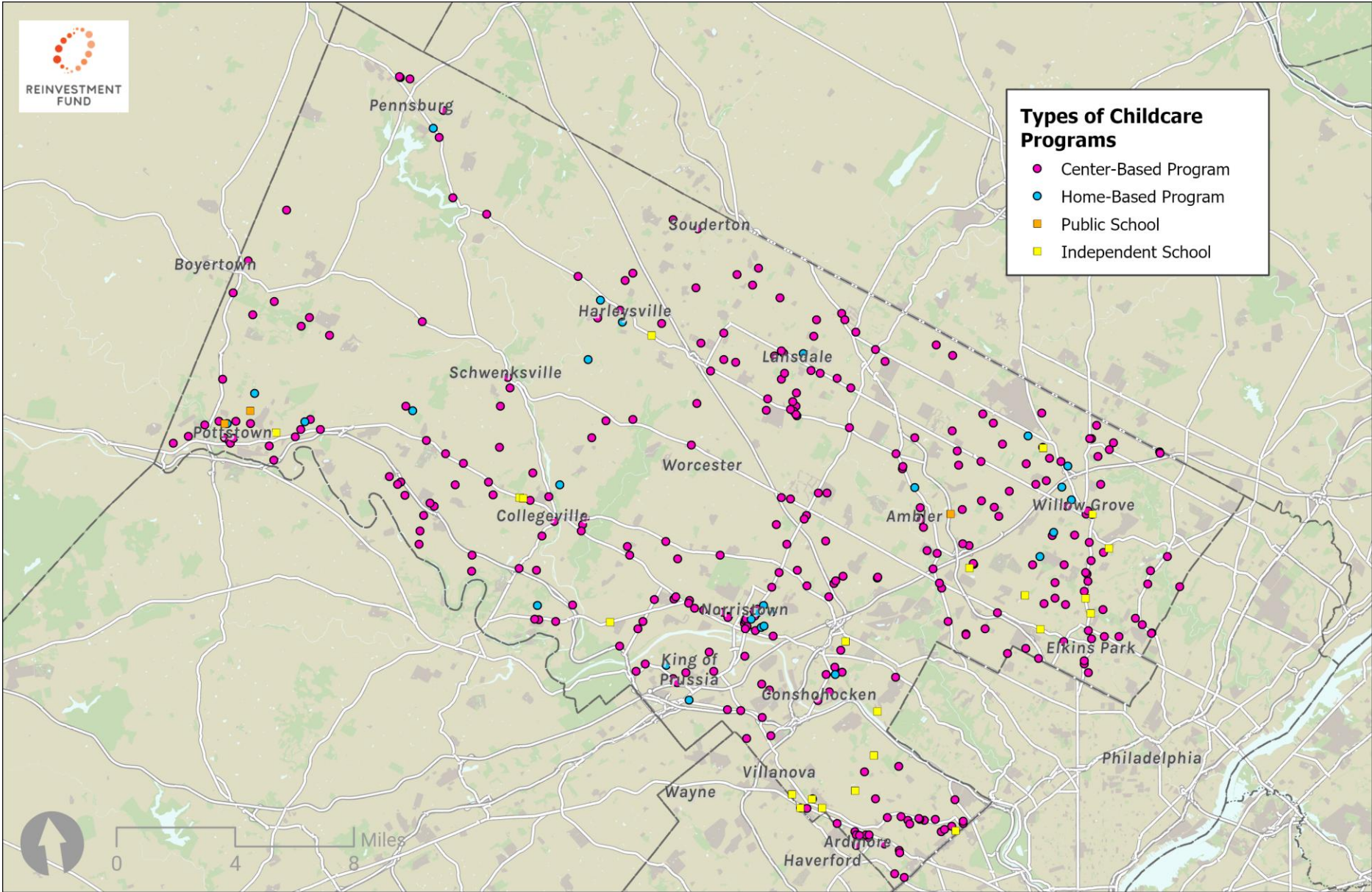
	# of Sites
Center-Based	314
Home-Based	27
School-Based (Public)	3
School-Based (Indep.)	21

Types of Childcare Programs
- Center-Based Program
- Home-Based Program
- Public School
- Independent School

Philadelphia Childcare Programs

	# of Sites
Center-Based	1045
Home-Based	477
School-Based (Public)	52
School-Based (Indep.)	12

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Types of Childcare Programs
- Center-Based Program
- Home-Based Program
- Public School
- Independent School
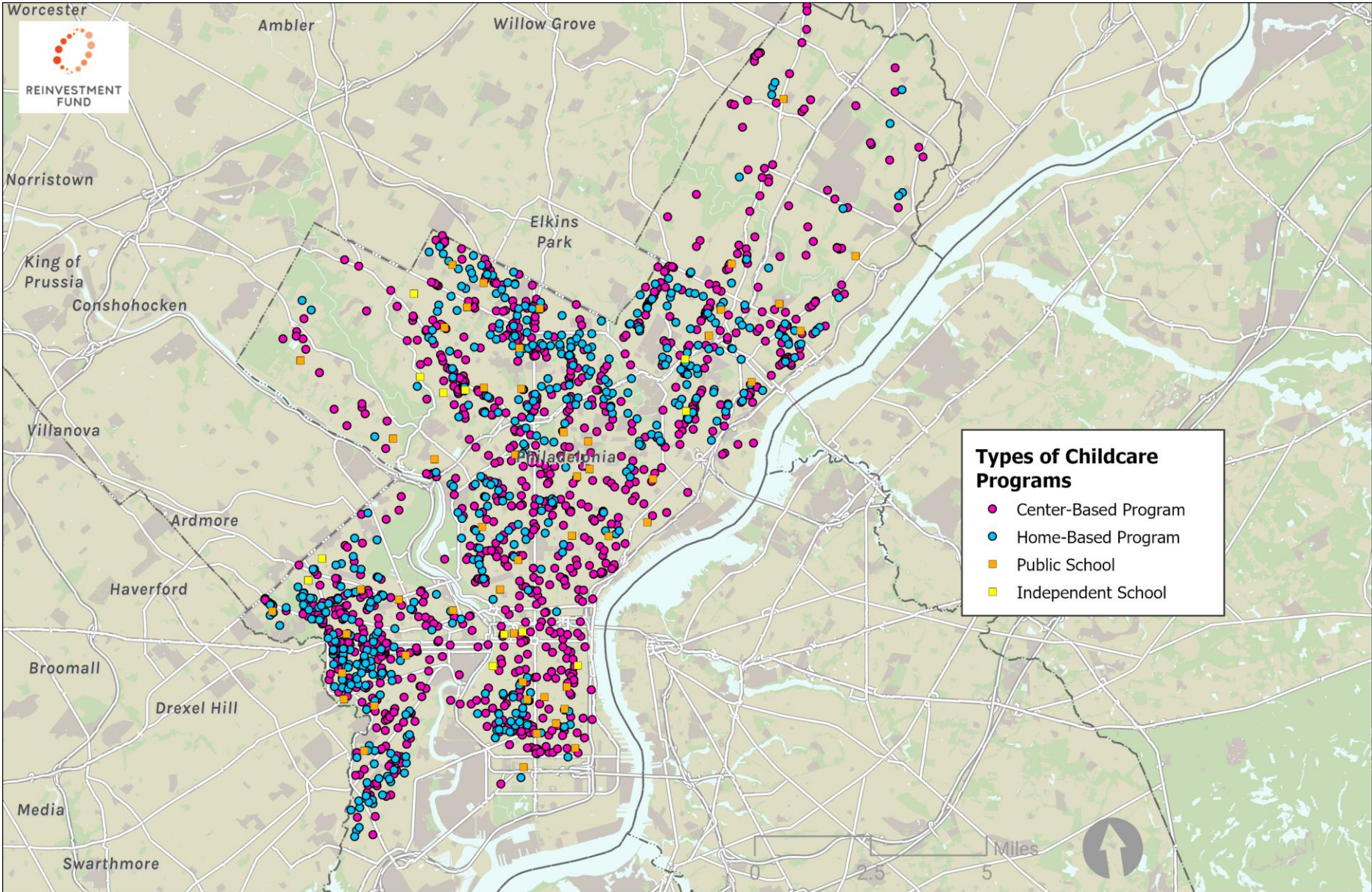
Childcare Shortages

Large Shortages in High-Quality Care

Counties Would Need to Add 91,500 Seats in High-Quality Programs to Ensure Access for All
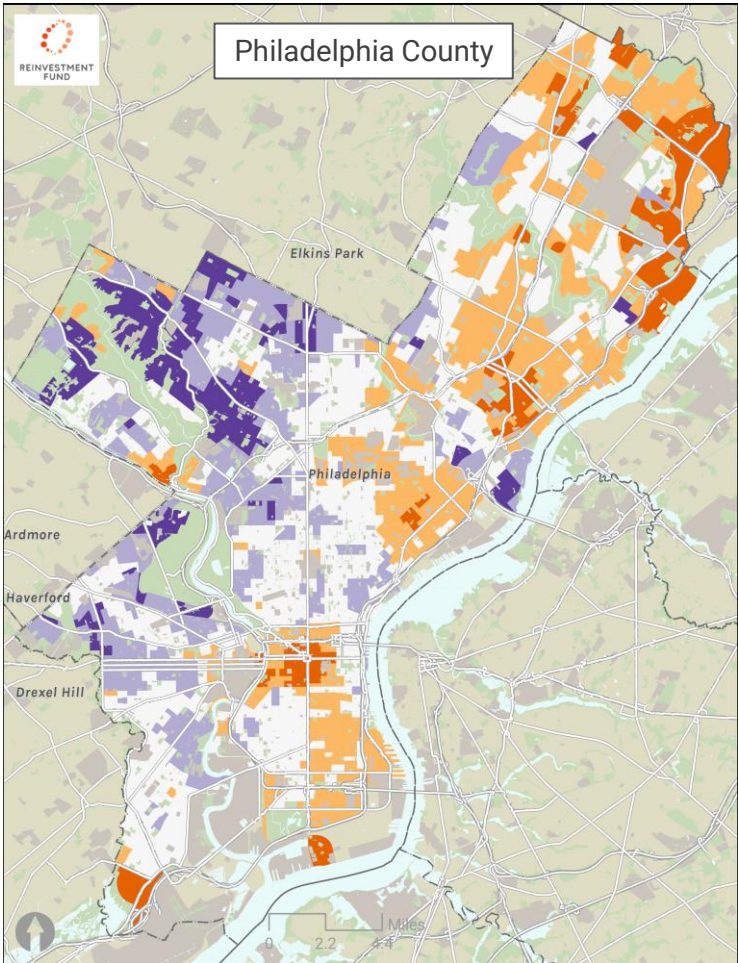
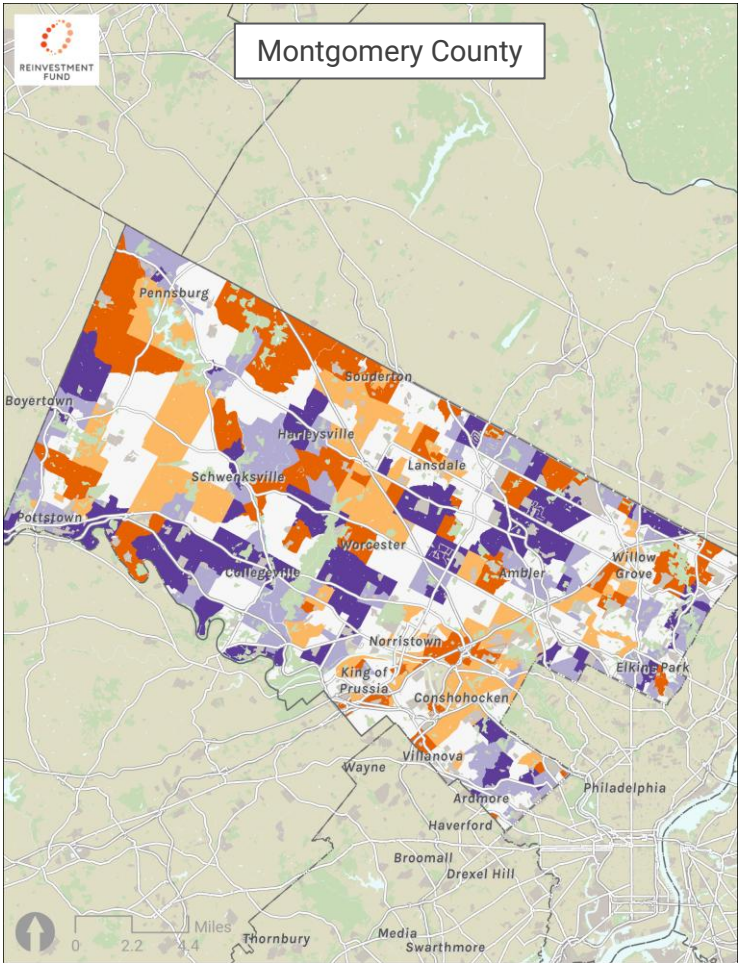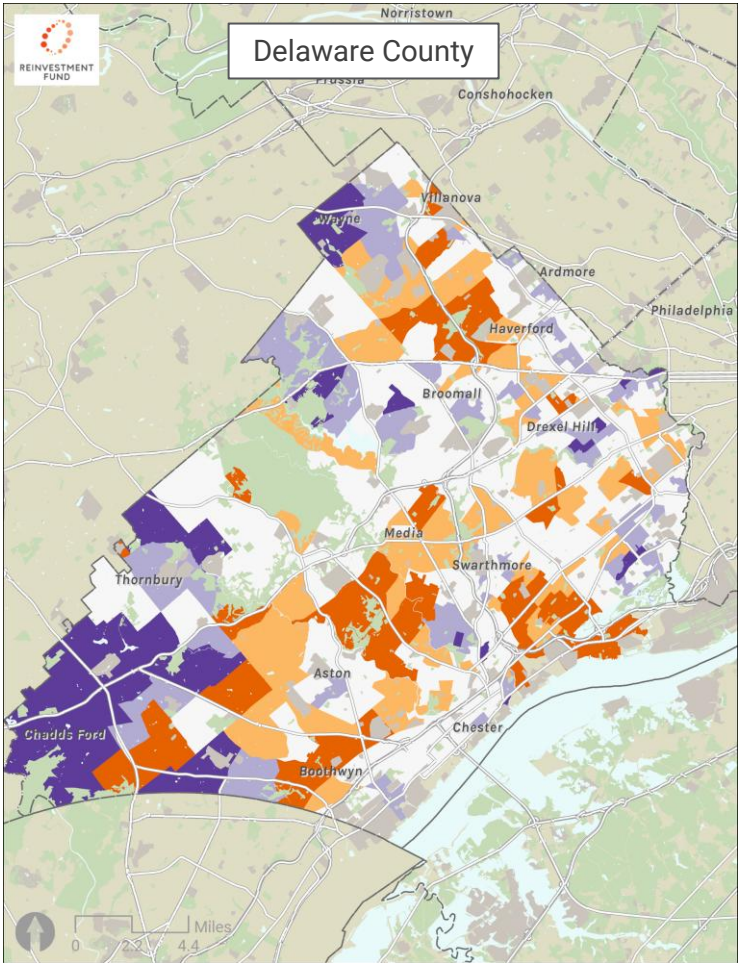*Overall Demand, Supply, and High-Quality Supply*

- 160,100 Children — All Children
- 154,800 Seats — Total ECE Capacity (5,300 Seat Gap)
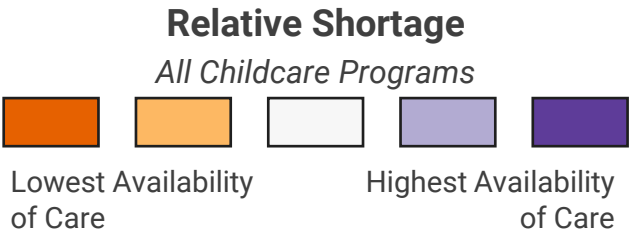- 68,600 Seats — High-Quality Capacity (91,500 Seat Gap)
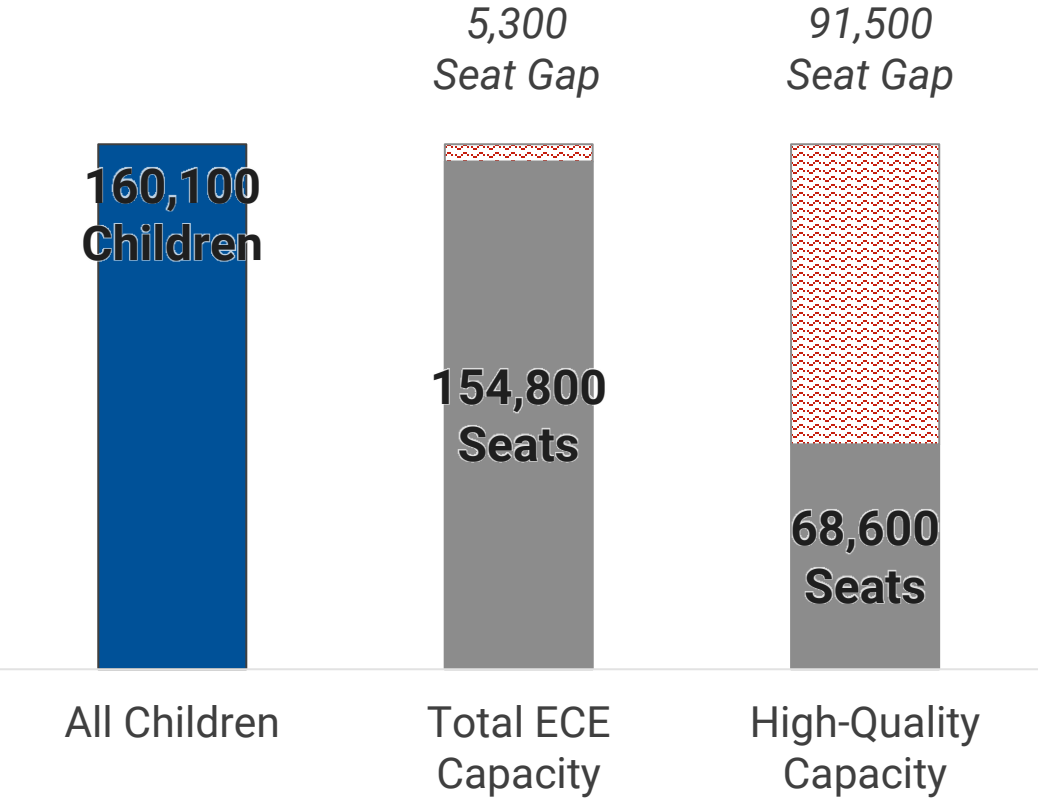
The Region Has Enough Seats for 97% of Children, but High-Quality Seats for Less than Half of Children

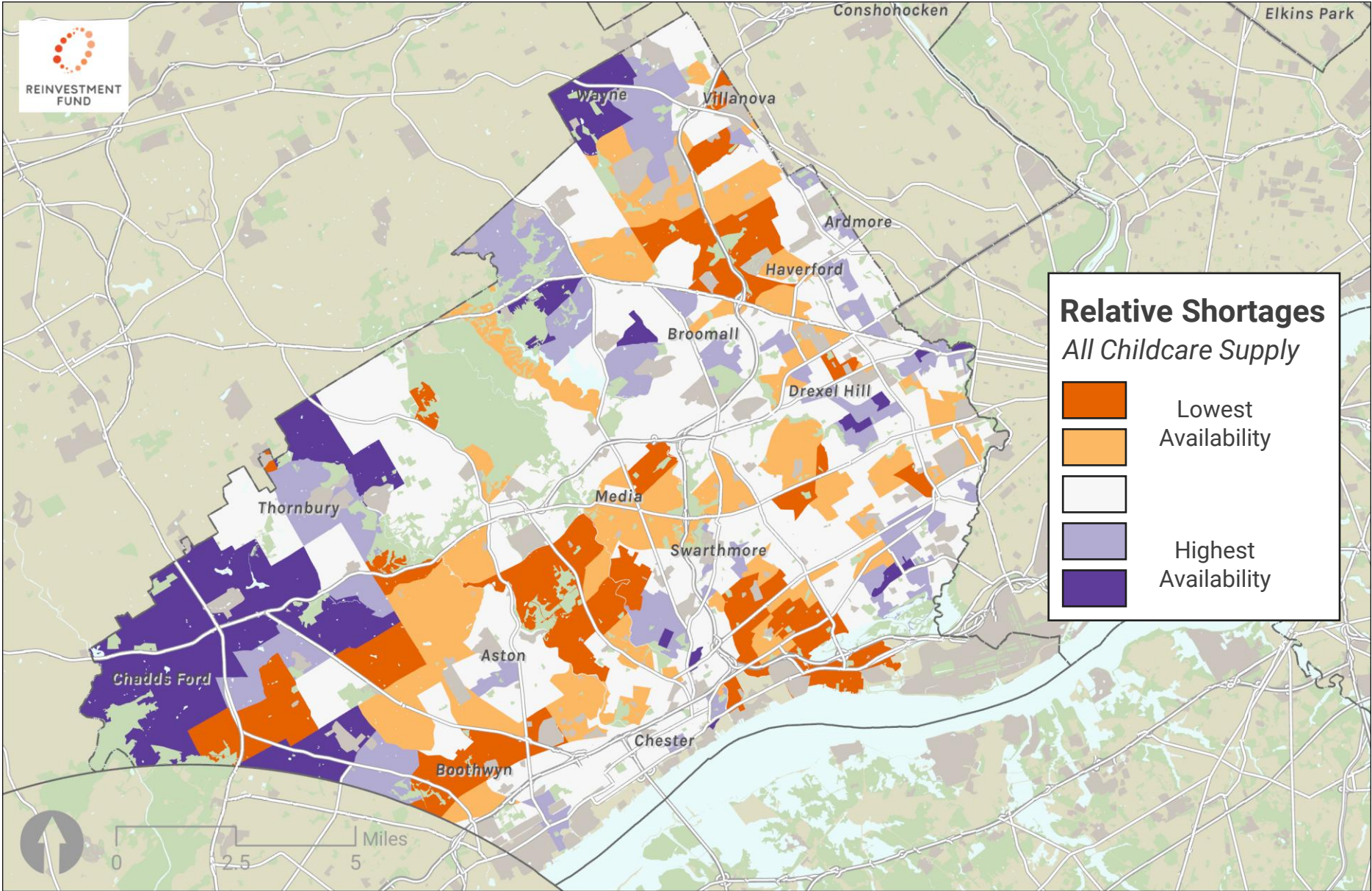*Childcare Capacity as a Share of Overall Demand, by County*

	Ratio of Total Supply to Demand	Ratio of High-Quality Supply to Demand
Delaware County	82%	31%
Montgomery County	93%	36%
Philadelphia County	104%	51%
Regional Total	**97%**	**43%**

How to Read this Table: The figures in this table show the share of children that could be served in existing programs. For example, in Delaware County there are enough seats for 82% of children, but only enough seats in High-Quality programs for 31% of children.
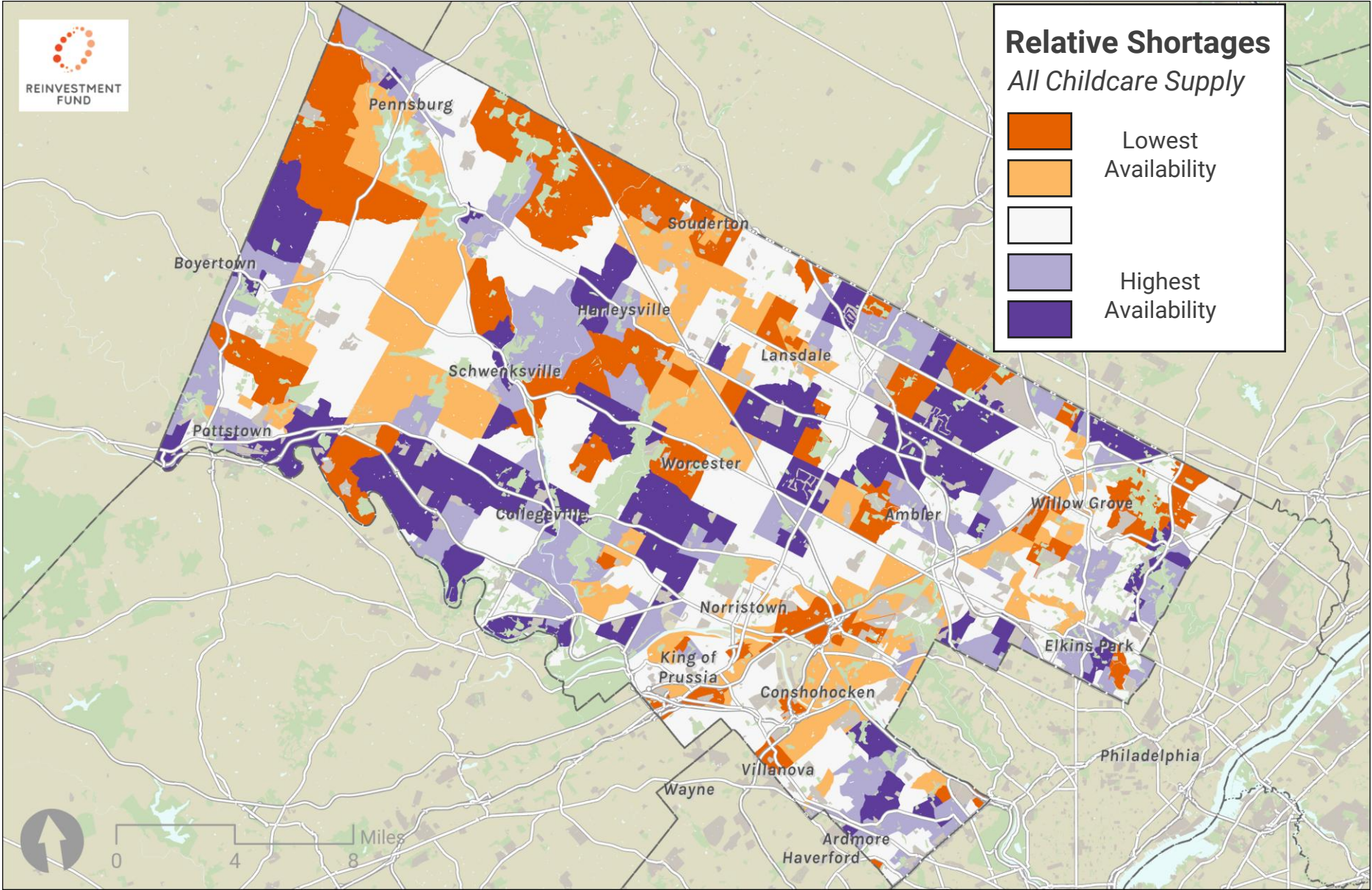
Relative Shortages

Relative Shortage

All Childcare Programs

Lowest Availability of Care — Highest Availability of Care
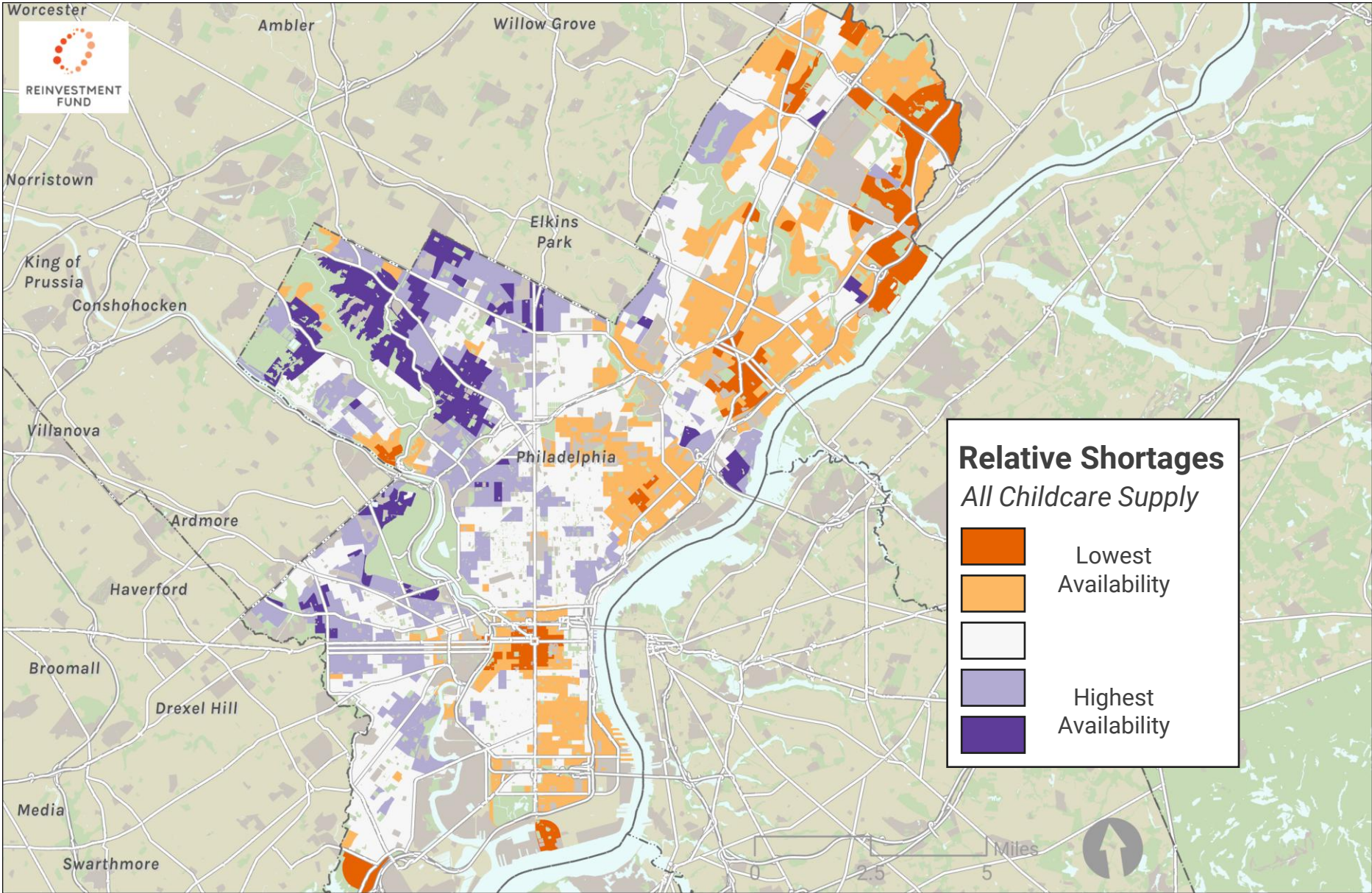

Delaware County

Montgomery County

Philadelphia County

Delaware County Relative Shortage Map

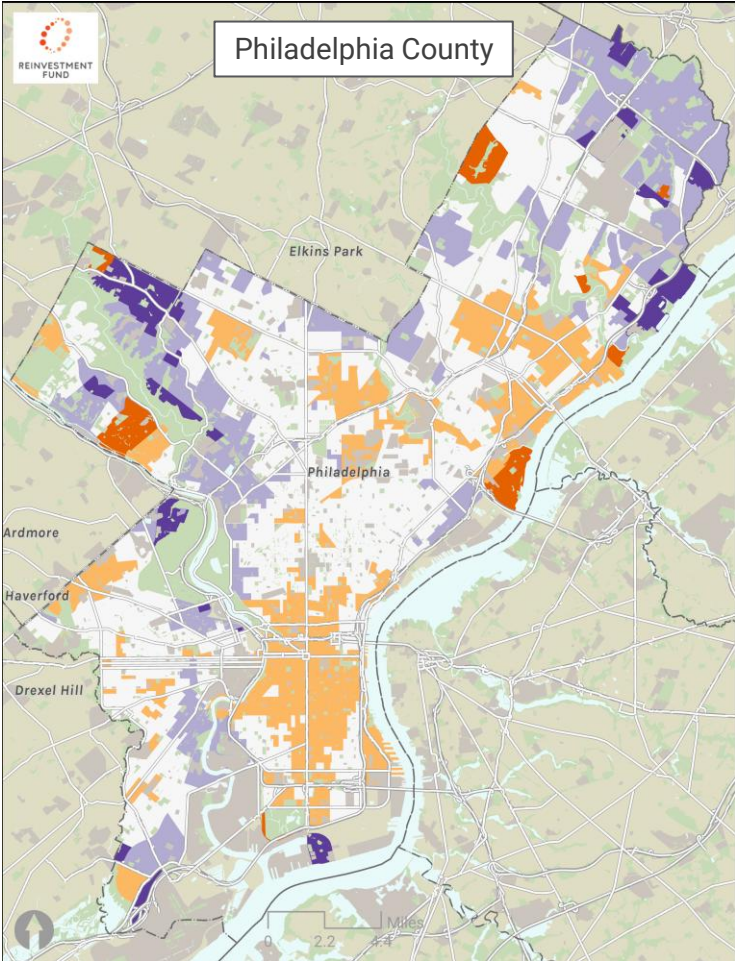Relative Shortages
All Childcare Supply

Lowest Availability
Highest Availability

Montgomery County Relative Shortage Map

Relative Shortages
All Childcare Supply

Lowest Availability

Highest Availability

Philadelphia Relative Shortage Map

Relative Shortages
All Childcare Supply

Lowest Availability

Highest Availability

High-Quality Relative Shortages

Relative Shortage
High-Quality Programs

Lowest Availability of Care — Highest Availability of Care

Delaware County

Montgomery County

Philadelphia County
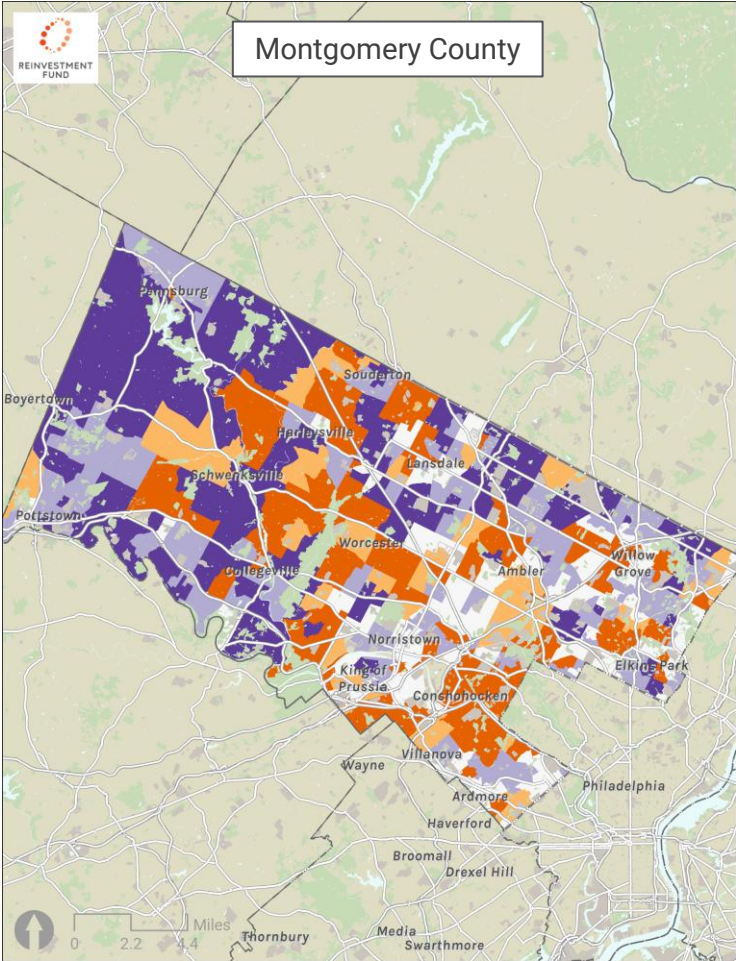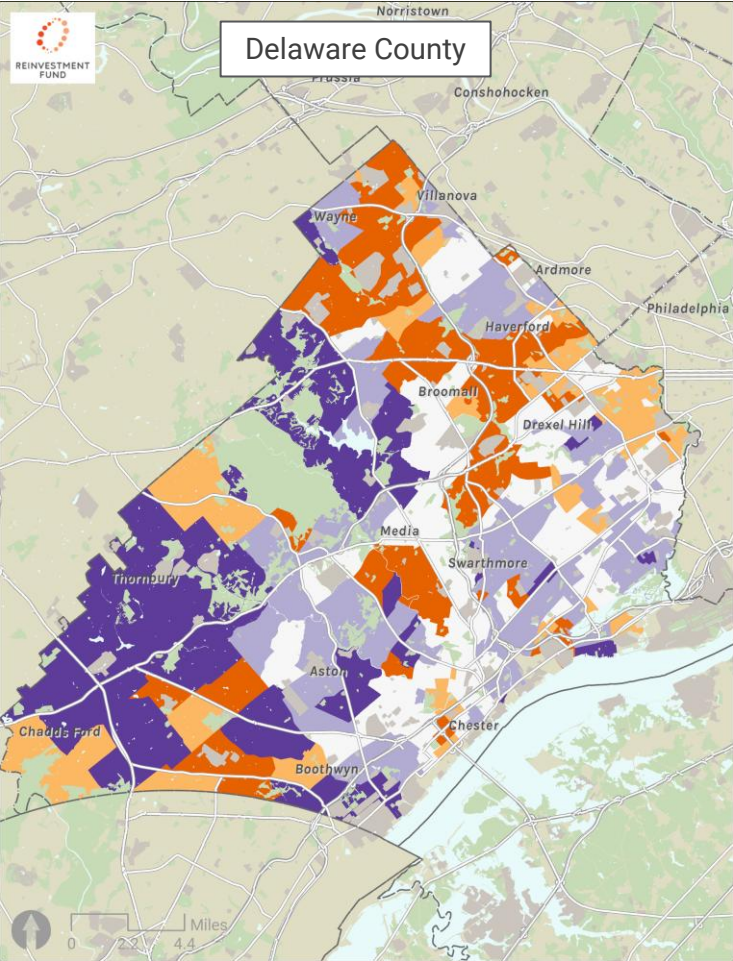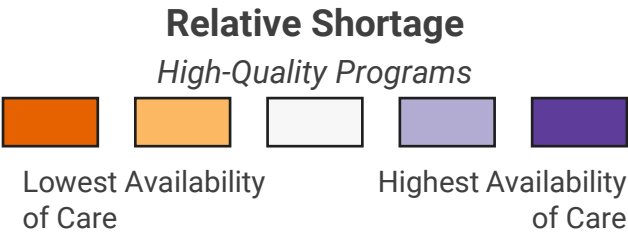
Delaware Co. High-Quality Shortages

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Conshohocken
Elkins Park
Wayne   Villanova
Ardmore
Haverford
Broomall
Drexel Hill
Media
Thornbury
Swarthmore
Aston
Chadds Ford
Chester
Boothwyn

Relative Shortages
High-Quality Childcare Supply

Lowest Availability

Highest Availability

0   2.5   5   Miles

Montgomery Co. High-Quality Shortages

Relative Shortages
High-Quality Childcare Supply

Lowest Availability

Highest Availability

Philadelphia High Quality Shortage Map

Relative Shortages
High-Quality Childcare Supply

- Lowest Availability
- Highest Availability
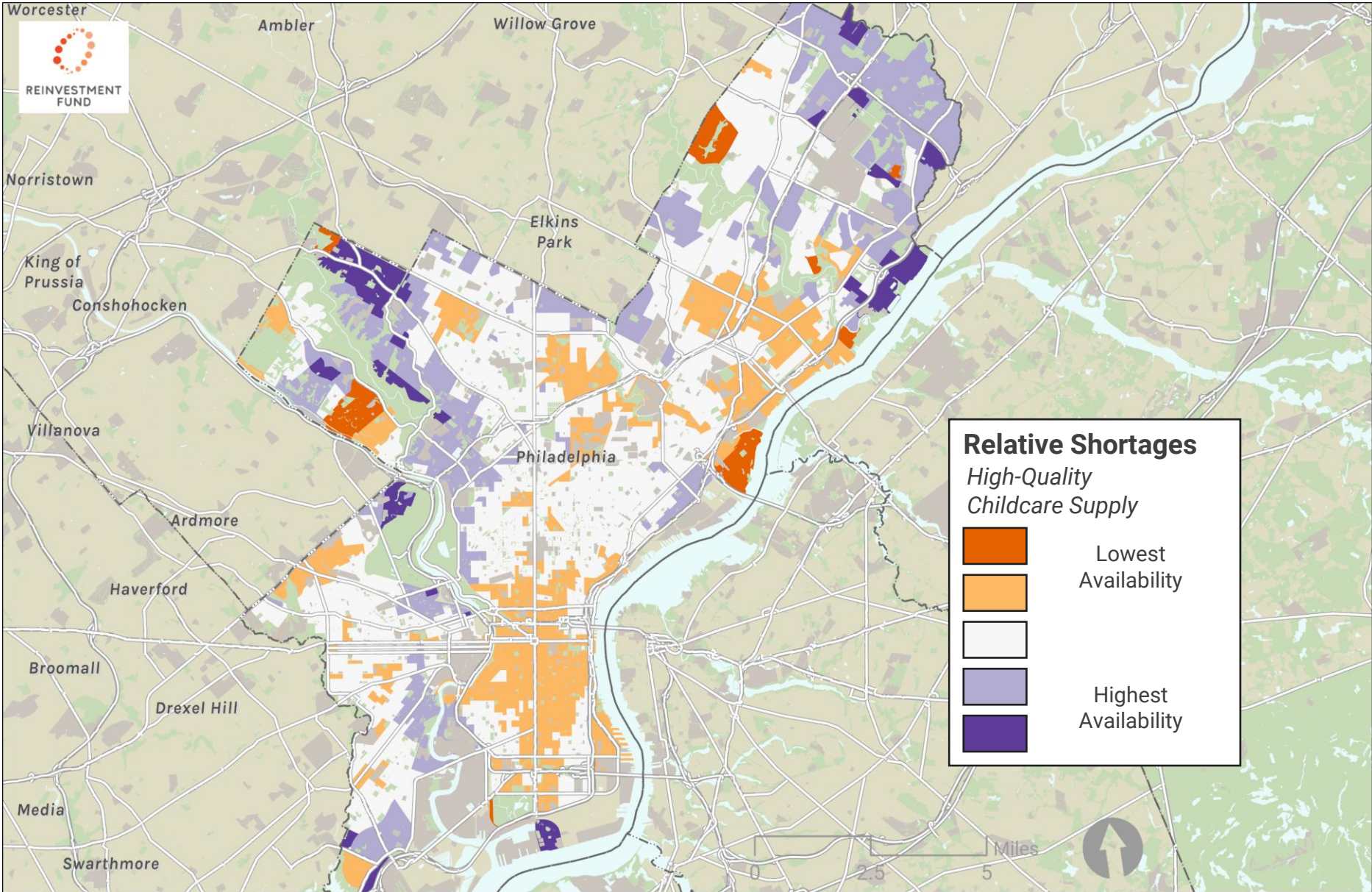
Other Access Barriers

After Hours and Weekend Care Supply

The Availability of Early Morning and Evening Care is Limited

Available License Capacity by Time of Day

<60,000 Seats Available Before 7:00am

<25,000 Seats Available After 6:00pm

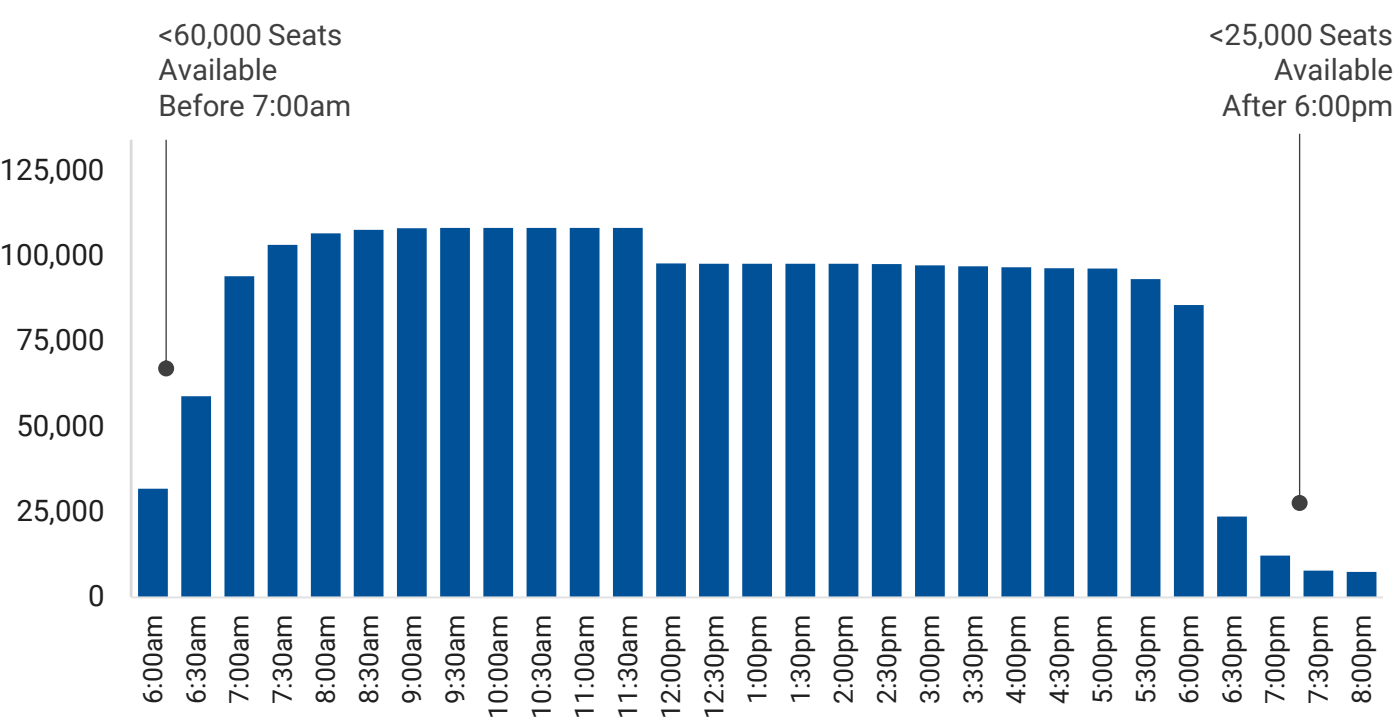## Morning Care is More Common than Evening or Weekend Care

	Delaware County	Montgomery County	Philadelphia County
Open Before 7:00am	11,200	9,500	38,300
Open After 6:00pm	4,100	3,800	16,000
Open On Weekends	2,900	500	15,400

*Analysis only includes programs for whom hours of operation were available (68% of all programs in the region)

Extended and Weekend Hour Care Access

The Shortage of After-Hours Care is Concentrated in Montgomery County, with Delaware and Philadelphia both Showing a Surplus of Capacity

Regionwide Demand and Supply of After-Hours Care

	Number of Children	Childcare Capacity	Surplus and Shortage
Parents Leave for Work Before 7:00am	44,600	58,700	Surplus 14,100
Parents Leave for Work After 6:00pm	6,400	7,400	Surplus 1,000
Parents Work Over the Weekend	Unknown	18,600	Unknown

Shortage & Surplus of After-Hours Care, by County

	Early Care (Open Before 7am)	Evening Care (Open After 10pm)
Delaware County	Surplus 600	Surplus 200
Montgomery County	*Shortage 3,500*	*Shortage 1,000*
Philadelphia County	Surplus 17,000	Surplus 1,800

REINVESTMENT FUND

*Analysis only includes programs for whom hours of operation were available (68% of all programs in the region). Demand for care was estimated by examining parent's share of children with one or more parent who departed for work before 6:30am or after 6pm)
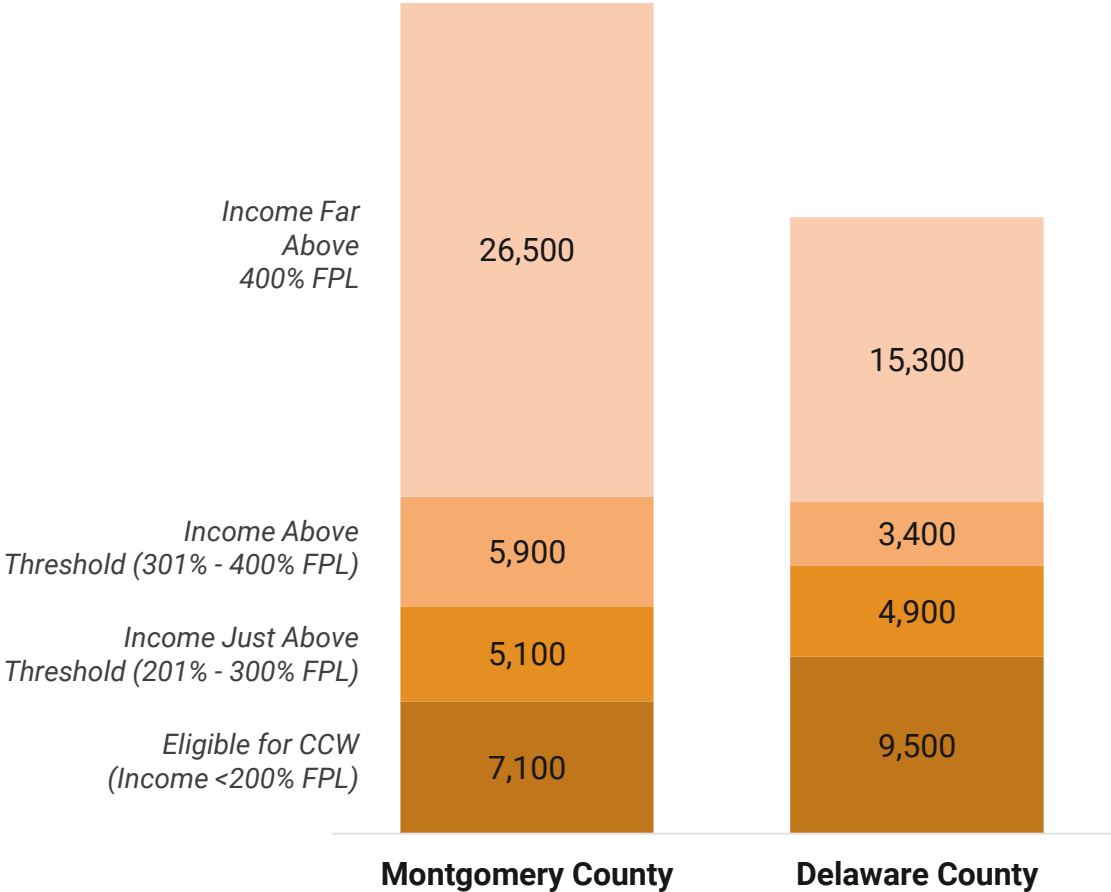
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Income Eligibility for Child Care Subsidy

The Commonwealth's Child Care Works program helps low-income families pay the cost of childcare. The state and federal governments fund the program, which is managed by the Early Learning Resource Center (ELRC) in each county.

To be eligible families must be working, enrolled in a training/educational program and have an income below 200% of the federal poverty rate (roughly $62,400 for a family of four).

In both Montgomery and Delaware Counties, a substantial number of families fall just above the income eligibility threshold.

Number of Children Under Five by Family Income and Federal Poverty Level

	Montgomery County	Delaware County
Income Far Above 400% FPL	26,500	15,300
Income Above Threshold (301% - 400% FPL)	5,900	3,400
Income Just Above Threshold (201% - 300% FPL)	5,100	4,900
Eligible for CCW (Income <200% FPL)	7,100	9,500

REINVESTMENT FUND

Family Income and Subsidy Eligibility

Incomes of Families with Children Have Risen Across All Three Counties…

Share of Children Under Five by Household Income, 2017 and 2022

Delaware County
- 2017: 28% | 26% | 23% | 22%
- 2022: 23% | 21% | 21% | 35%

Montgomery County
- 2017: 17% | 29% | 25% | 29%
- 2022: 11% | 21% | 22% | 46%

Philadelphia County
- 2017: 56% | 26% | 10% | 8%
- 2022: 43% | 27% | 13% | 17%

Legend: ■ <$50K ■ $50k - $100k ■ $100k - $150k ■ >$150K
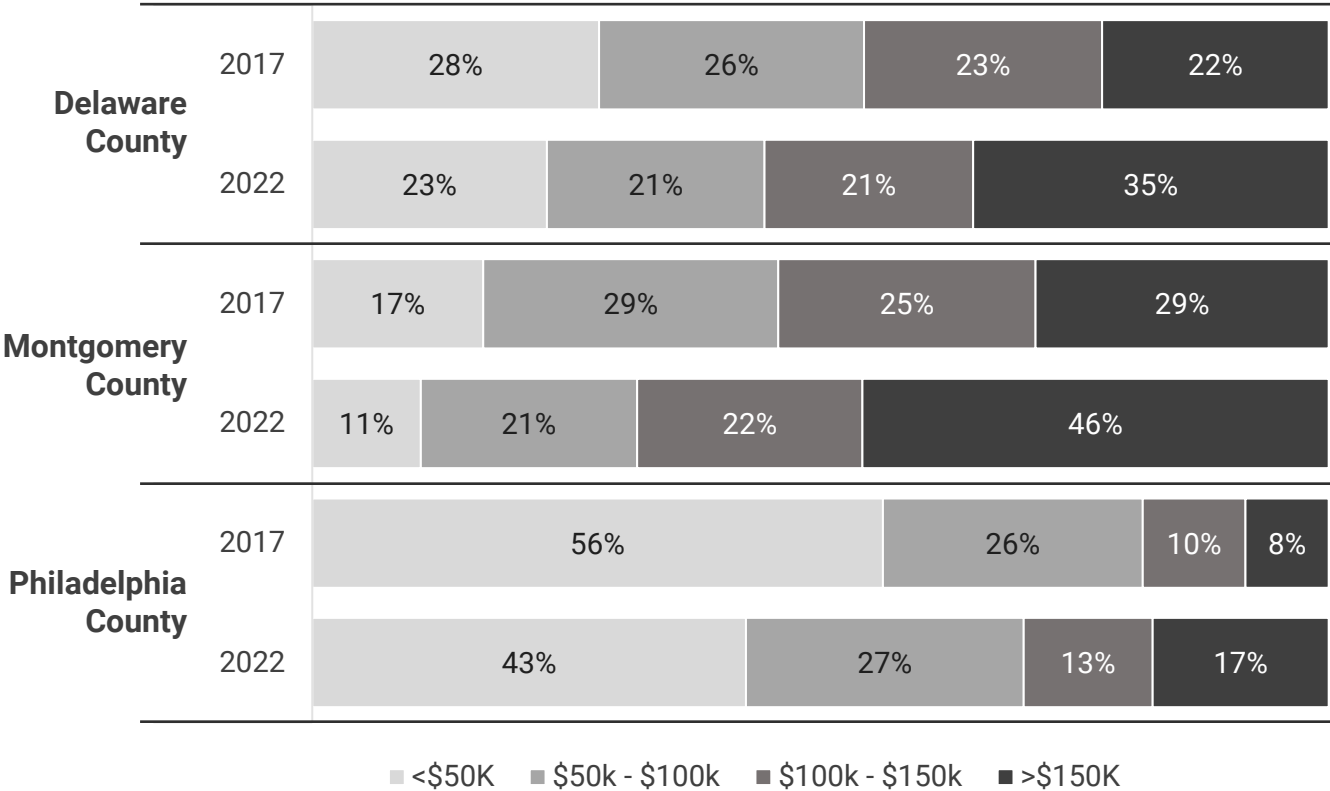
…But a Sizable Number of Children Likely Quality for Subsidy to Offset Childcare Costs.

Children Under Five in Households Earning Less than CCW Income Limits

	Number Eligible	Share Eligible
Delaware County	9,500	30%
Montgomery County	7,100	17%
Philadelphia County	51,500	53%

Note: These estimates only examined household size and income. Calculations did not consider a parent's employment status.

REINVESTMENT FUND