

DELAWARE COUNTY 2035
THE LAND | THE PEOPLE | THE PLACES

IMPLEMENTATION METRICS REPORT

November 2017





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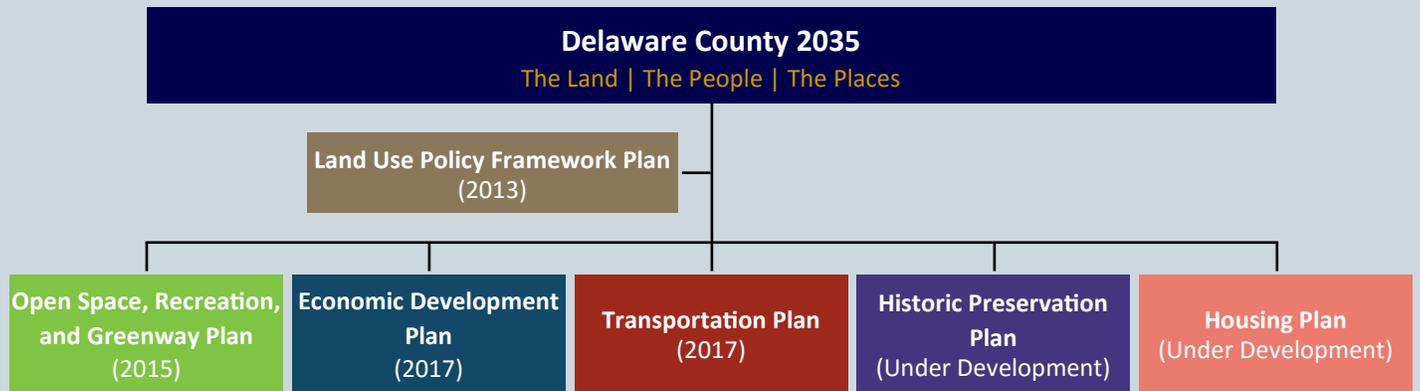
INTRODUCTION

This report serves to measure the progress made in implementing Delaware County 2035, the County’s comprehensive plan. It is important to note that Delaware County 2035 is a long-range planning document and that this Implementation Metrics Report is not a final report; rather, it is the beginning of a process that will continue to monitor implementation progress and success of these plans. Delaware County 2035 recognizes the importance of strengthening partnerships to work together towards implementation of these plans. The information presented within will help to guide the County and its partners in prioritizing strategies to reach the goals identified in each component.



Delaware County 2035

Delaware County 2035, the County’s comprehensive plan, establishes a long-range vision for the County and provides municipalities with a framework for local planning efforts. It is a network of plans comprised of a *Land Use Policy Framework Plan*, which established broad policies, and more detailed component plans which provide specific goals, objectives, and actions.



METRICS AT A GLANCE

The enclosed metrics will help the County to track progress in implementing Delaware County 2035. Perhaps most importantly, it will help the County to determine the efforts that are working most effectively and which goals may need more focus or a different approach. It uses commonly available data that is tracked regionally or nationally and regularly updated; this allows the report to be updated annually. Each metric uses the most recently available data at the time of this report. A “Strength of Progress” indicator is included for each graphic; this interpretation represents the progress of the County in working towards these goals and takes local, regional, and national trends into consideration.

At this time, some important topics are not measurable. The County is working to identify opportunities to close these data gaps to better analyze progress and plan for the future. As stated above, this Implementation Metrics Report is not a final report; rather, it is the beginning of a process that will continue to monitor implementation progress and success of these plans.

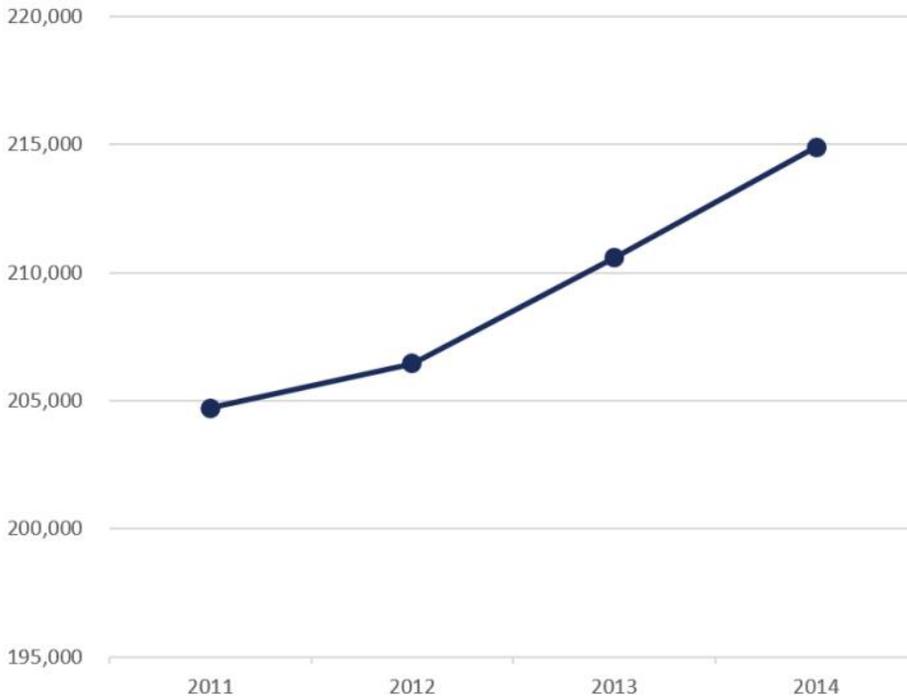


NUMBER OF JOBS

SIGNIFICANCE

The number of jobs within the County reflects employment opportunities available to residents of the County and region. It is a primary indicator of economic health, providing earnings, and creating discretionary income to households and consumers. One of the principal goals of the County's Economic Development Plan is the retention and attraction of a diverse range of industries and employers to provide well-paying jobs for County residents.

Number of Jobs in Delaware County



Data Source: County Business Patterns, 2011-2015

ANALYSIS

The number of jobs located in the County has increased over the past five years, rising from 204,707 in 2011 to 214,886 in 2015. This increase in jobs creates more employment opportunities for residents of the County and region and is a contributing factor to lowering the unemployment rate. The increasing number of jobs located in the County is an indicator of a strengthening local economy with employers adding new positions due to business growth, the movement of new employers and jobs to the County, or both.

The increase in the number of jobs in the County coincided with an increase in the number of employers, rising from 12,629 establishments located in the County in 2011 to 12,769 in 2015. Industries that experienced notable increases in the number of establishments, the number of paid employees, or both included construction, retail trade, management of companies and enterprises, educational services, health care and social assistance, and administrative and support occupations. Industries that experienced a decrease in the number of establishments and/or employees located within the County included manufacturing and wholesale trade.

ECONOMIC DEVELOPMENT



RECENT EFFORTS

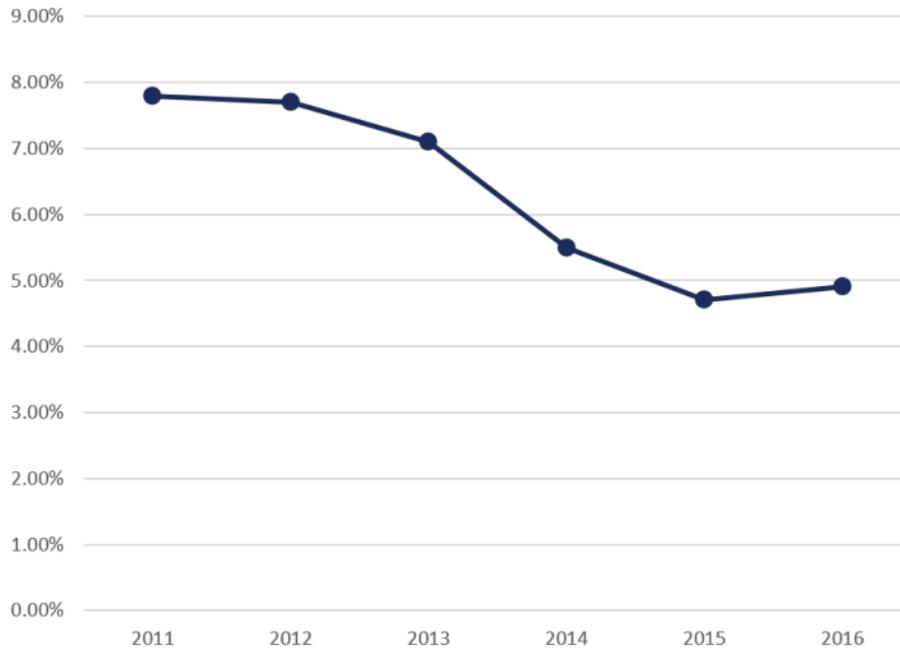
The County has partnered with HeadRoom, a small business incubator in Media and Wayne, and SCORE, an organization of experienced volunteers dedicated to providing free counseling and seminars to help small businesses. The County sponsors qualifying start-ups and small businesses to use HeadRoom's facilities to incubate and develop their businesses. The County also helped turn the former Marcus Hook refinery into a natural gas and energy hub, creating jobs that may have otherwise been lost.

UNEMPLOYMENT RATE

SIGNIFICANCE

The Unemployment Rate is the percentage of the labor force currently jobless, looking for a job, and available for work. Unemployment is generally a lagging economic indicator, rising or falling in response to economic conditions rather than anticipating them. A decreasing unemployment rate indicates that an economy is growing, creating job opportunities for those looking for employment.

Unemployment Rate



Data Source: Bureau of Labor Statistics, Local Area Unemployment Statistics Program, 2011-2016.

ANALYSIS

The unemployment rate in Delaware County has been steadily declining in recent years, dropping from 7.8% of the active labor force in 2011 to 4.9% in 2016. This drop in the rate reflects the continued economic recovery from the 2008 economic recession, with the unemployment rates for Delaware County lower than the corresponding rates for the Commonwealth of Pennsylvania and nationally.

The decreasing unemployment rate means that more residents actively looking for work are finding new employment. The increase in people finding work occurred while the County labor force has grown from 286,894 people in 2011 to 295,542 in 2016. During this period the number people employed increased from 254,643 individuals to 281,026 in 2016. The increase in the size of the County labor force and employment indicate more job openings have become available to residents in the County and surrounding region, due to business expansions and relocations to the County and region.

ECONOMIC DEVELOPMENT



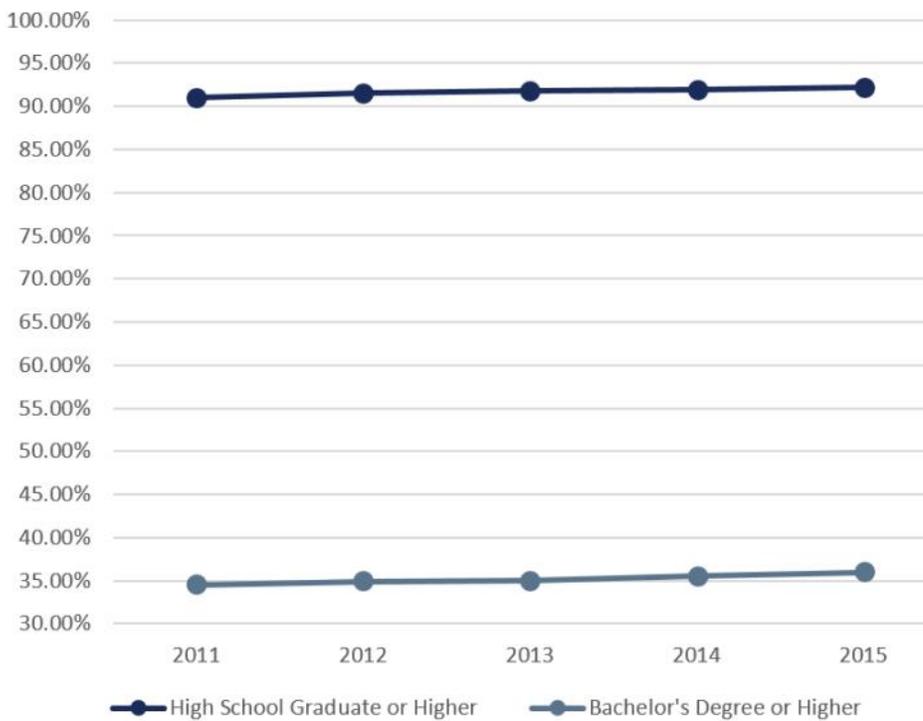
RECENT EFFORTS

Delaware County partnered with the Chamber of Commerce and Educational Data Services to provide on-the-job training in the fields of healthcare, energy, and advanced manufacturing. Through this program, inexperienced workers can learn right on the job, and some of the trainee's wages are reimbursed during the training phase. The County also started the Platform to Employment Program, which combines intensive job search with financial and behavioral counseling targeted to serve the long-term unemployed.

EDUCATIONAL ATTAINMENT

SIGNIFICANCE

Educational Attainment is broadly representative of the preparedness and productivity of the County workforce for employment in a range of professions and industries. Educational attainment provides the knowledge and skills employers look for in the workforce and can help the County attract high-wage employers. Further, higher levels of educational attainment are strongly correlated to higher levels of median income.



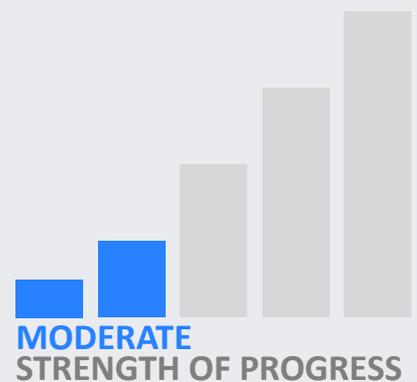
Data Source: U.S. Census Bureau, American Community Survey, 5-Year Estimates, 2011-2015

ANALYSIS

Educational attainment in Delaware County has been increasing with the number of high school graduates rising from 91% of County residents 25 years and older in 2011 to 92.2% in 2015, and attainment of a Bachelor's degree increasing from 34.5% of the County population 25 year and older in 2011 to 36% in 2015.

Educational attainment is correlated with higher median earnings, with individuals attaining a graduate or professional degree earning the highest median incomes, followed by those holding a Bachelor's degrees, then individuals with Associates degrees or some college, and then high school graduates. The number of individuals in the County earning graduate or professional degrees, as well as Associates degrees both increased from 2011 to 2015. The fact that educational attainment has been steadily increasing indicates the County is educating and training its workforce well to be prepared for the jobs of the modern economy.

ECONOMIC DEVELOPMENT



RECENT EFFORTS

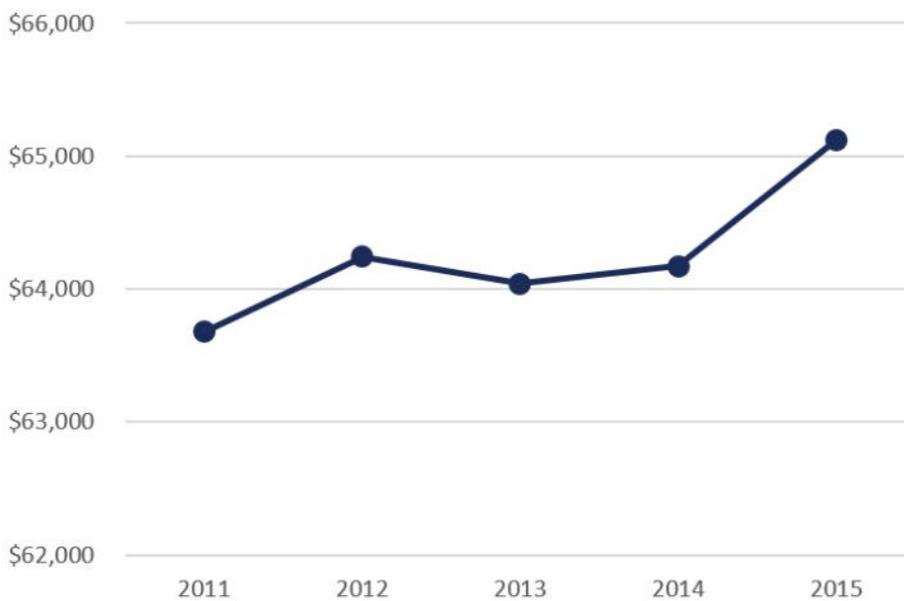
Access to higher education is increasing as local colleges continue to grow. Delaware County Community College is adding new programs, particularly in science and technology. Penn State Brandywine is adding dorms to its campus, while Swarthmore College and Villanova University are both modernizing and expanding their campuses. Local school districts are reinforcing investment in vocational-technical programs and partnering with colleges to expand opportunities.

MEDIAN HOUSHOLD INCOME

SIGNIFICANCE

Annual Median Household Income represents the earnings and wages of County residents. It is indicative of the overall financial capabilities of the community. Increases in annual median income that exceed inflation often result in greater disposable incomes which can increase discretionary spending and enhance local and regional economic growth.

Annual Median Household Income



Data Source: U.S. Census Bureau, American Community Survey, 5-Year Estimates, 2011-2015

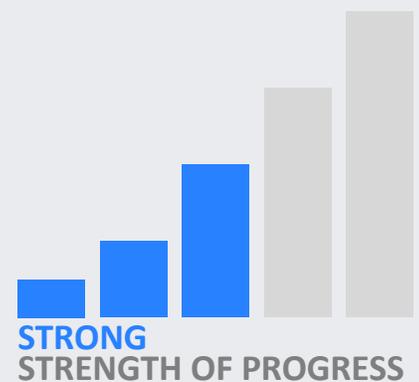
ANALYSIS

The annual median household income of Delaware County has risen steadily over the past five years, reflecting the continued economic recovery from the 2008 national recession and an increasing median income for the Philadelphia region as a whole. The median income for the County rose from \$63,677 in 2011 to \$65,123 in 2015, reflecting a positive economic outlook from regional employers and the capacity to increase salary and wage rates. The rate of increase in the County’s median household income reflects the overall moderate pace of recovery nationally from the recession and approximately maintains pace with rates of inflation over the same period.

Increases in household median income may occur as business earnings and profits rise due to market conditions and overall economic growth. Median incomes may also rise as the number of higher-paying salary and wage positions in the region increase and if education and training levels of the County workforce are adequate to meet the skills requirements of these jobs. Higher incomes strengthen local and County budgets by leading to greater tax revenues.

ECONOMIC DEVELOPMENT

HOUSING



RECENT EFFORTS

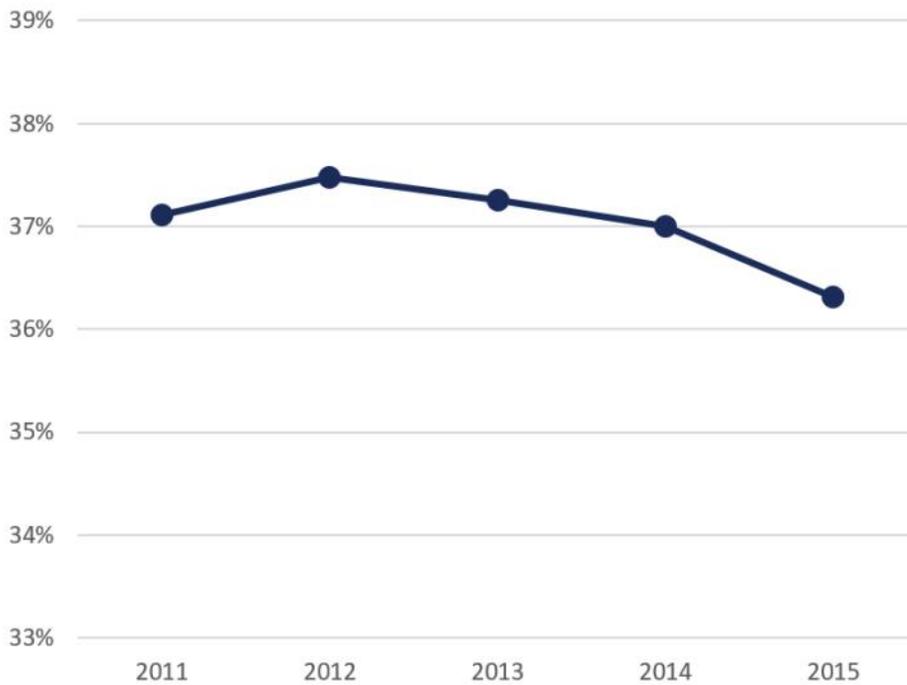
Delaware County has developed a marketing campaign, “Get the Edge,” to recruit businesses to locate or remain within the County. The campaign highlights the benefits and opportunities of locating a business within the County and attracts new industry and jobs each year. The County also works with the Delaware County Community College and local businesses to provide training for high-paying jobs in the energy industry and established commercial trades.

HOUSING AFFORDABILITY

SIGNIFICANCE

Housing Affordability, defined as the percentage of household income devoted to monthly housing costs, is representative of the diversity in the County's housing stock and the ability of the County to provide housing options for a broad demographic. Housing is generally considered affordable if a household is paying less than 30% of its income for monthly housing costs.

Percent of Households Spending 30% or More on Housing



Data Source: U.S. Census Bureau, American Community Survey, 5-Year Estimates, 2011-2015

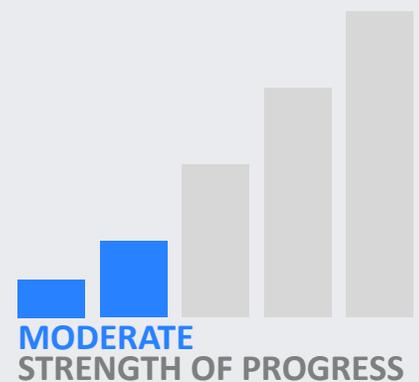
ANALYSIS

Overall, the percentage of households in Delaware County paying 30% or more of their household income on housing costs has decreased slightly over the past five years. However, there are several factors at play. As the average household size has remained steady, the total number of households has decreased. Additionally, the median household income in the County has increased since 2011. In terms of housing expenditures, the greatest decrease in unaffordable housing has been among those making \$75,000 or more; there was little to no significant change among lower income brackets.

Overall, the percentage of owner-occupied households spending 30% or more of household income on housing has decreased since 2011 to just under 30%. Although Delaware County is still strongly a homeowner market, the share of renter-occupied housing has been gradually increasing and is currently about 30% of all housing units. More than half of renter-occupied households are spending 30% or more of their income on housing costs. This has steadily increased since 2011 and is partially attributed to a median gross rent that has increased by more than 5% in that same time period.

ECONOMIC DEVELOPMENT

HOUSING



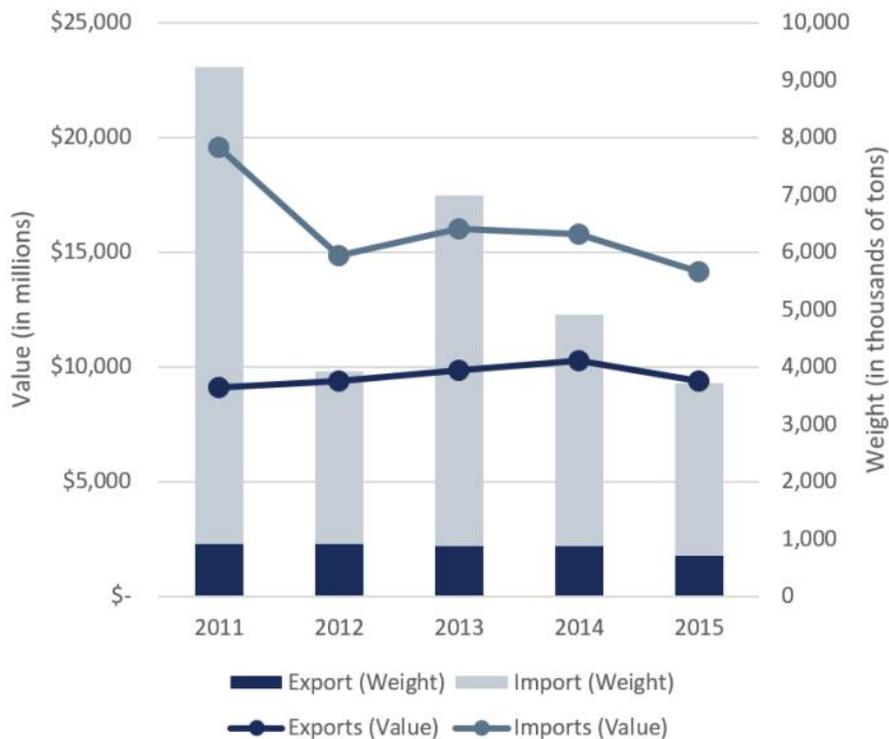
RECENT EFFORTS

The County produced a five-year Consolidated Plan in 2015, which assesses the County's housing and community development needs and details both a long-range plan and short-term actions which are assessed annually. The County is currently in the process of developing a Housing Element of Delaware County 2035 that will build on the short-term Consolidated Plan but cover a broader scope and longer timeframe.

FREIGHT MOVEMENT

SIGNIFICANCE

The volume and value of Freight Movement (imported and exported) through Delaware County ports is indicative of the capability and quality of the freight network in the County. The movement of goods is, and has historically been, a vital part of the County's economy. It employs thousands along the Delaware River and at the Philadelphia Airport and thousands more at warehouses and distribution centers around the County.



Data Source: DVRPC, 2016

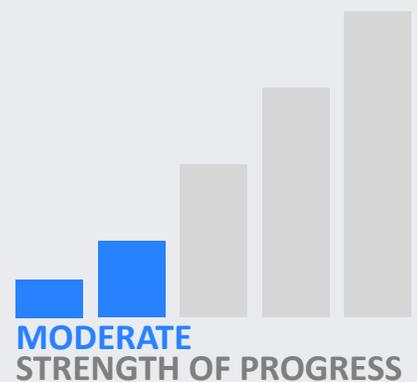
ANALYSIS

While the volume (weight) of goods has decreased significantly since 2011, the value (in dollars) has stayed relatively the same or decreased only moderately by comparison. This is indicative of the economy in the twenty-first century; many high-value goods are small in size/weight. For example, some of the most valuable goods exported include medical and surgical instruments. Europe is the largest trading partner in terms of volume of imports and exports and value of exports; North American partners represent the largest value of imports. While there are still more imports than exports, the gap is shrinking.

The movement of freight is an important factor in the local economy and represents thousands of jobs in our region. While the number of transportation and warehousing establishments is increasing in the County, the number of jobs is not; however, the salary for these jobs have increased drastically (annual salary of \$34,233 in 2006 to \$47,293 in 2014). While the weight of goods has decreased, the value of goods has maintained steady. Similarly, the industry has seen an increase in the quality of jobs supported.

TRANSPORTATION PLAN

ECONOMIC DEVELOPMENT



RECENT EFFORTS

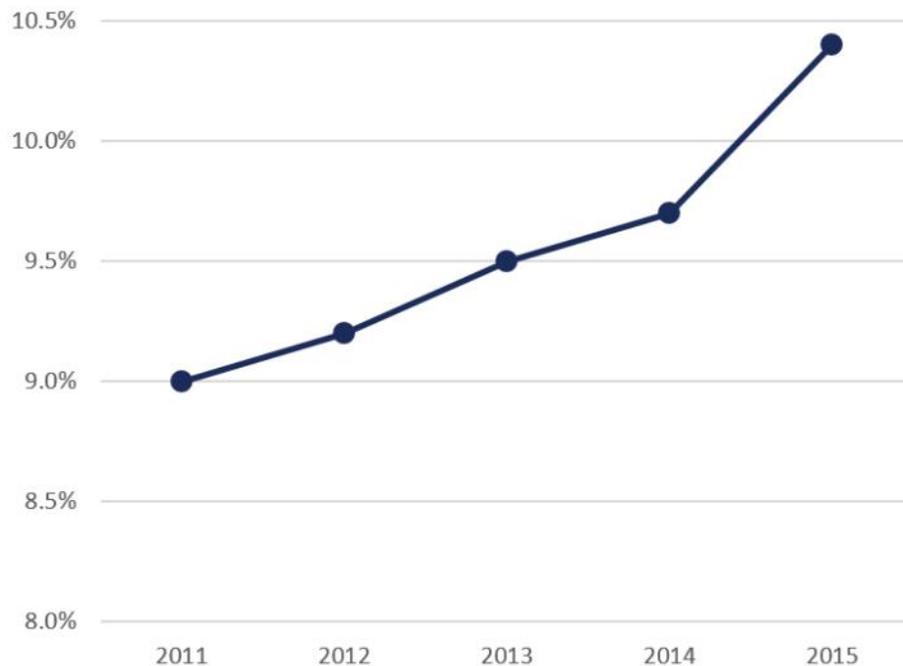
Delaware County has worked with Sunoco Logistics to repurpose the former Marcus Hook Refinery into an east coast energy hub. This work will result in both increased domestic freight imports and international exports. The U.S. Army Corps of Engineers and Philadelphia Regional Port Authority have dredged the main navigation channel in the Delaware River. This will allow new, larger Panamax vessels to travel up the Delaware River and for local ports to remain competitive.

TRANSIT COMMUTE SHARE

SIGNIFICANCE

Transit Commute Share represents the percentage of commuters who use public transit to get to work. Effective use of the transit system can help alleviate congestion on roadways and reduce reliance on the automobile. The number of commuters who use public transit is also indicative of the effectiveness of the system to get people between residences and places of work and public confidence in the reliability of the transit network.

Percent of Commuters Using Public Transit



Data Source: U.S. Census Bureau, American Community Survey, 5-Year Estimates, 2011-2015

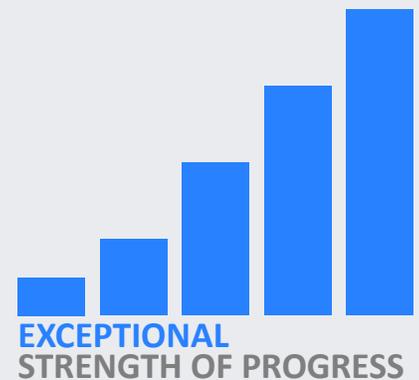
ANALYSIS

The number of people using public transit systems to commute has been increasing across the country over the past several years. This is a result of many cities expanding systems and others reinvesting in existing systems to increase the reliability. Increases in traffic congestion and the fluctuation of gas prices have also contributed to the increase in ridership.

Transit ridership in Delaware County, and across the region, follows this national trend. The percentage of commuters taking transit to work has increased from approximately 9% in 2011 to nearly 10.5% in 2015. This is more than a 16% increase in the number transit commuters. It is indicative of the need to continuously optimize service to ensure that there is adequate and appropriate access between employment and residential centers. It also represents a desire of residents to take transit when possible; as such, strategic expansion of service may be necessary as the County and region continue to grow.

TRANSPORTATION PLAN

ECONOMIC DEVELOPMENT



RECENT EFFORTS

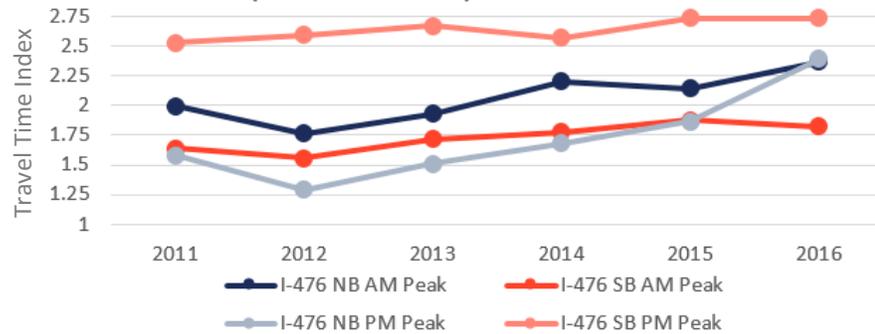
SEPTA and the County are planning for the extension of the Media/Elwyn Line to a newly constructed Wawa station to serve the new development in western Delaware County. SEPTA continues efforts to update the underlying infrastructure of its network, leading to better reliability for riders. The County is working with municipalities to improve pedestrian access to transit stations by collecting sidewalk data and identifying crucial gaps in the pedestrian network.

TRAVEL TIME

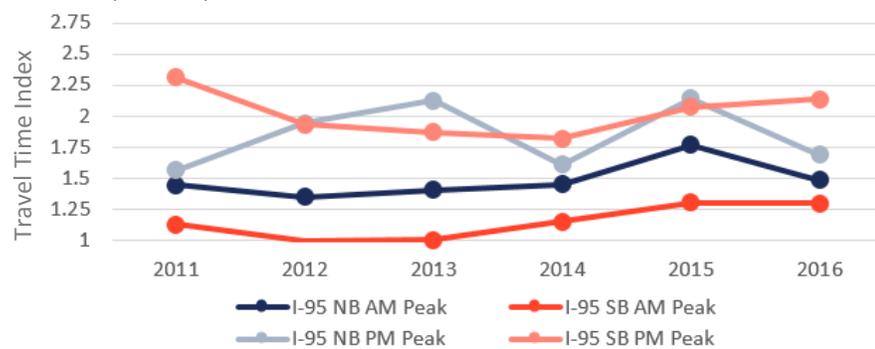
SIGNIFICANCE

Travel Time provides an overview of how efficiently the main highways are functioning during peak hours. It offers some insight into the effect congestion may have on the daily lives of commuters and the timely movement and delivery of goods across the region. Though these figures relate only to interstate highway travel times, congestion on these major arteries ripples through the local street network.

Travel Time Index (On-time Arrival)



Note: 1 = Trip time at speed limit



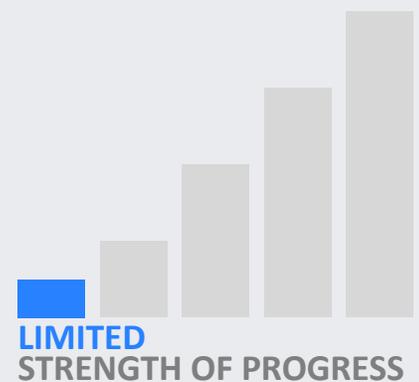
Data Source: I-95 Corridor Coalition Vehicle Probe Project (VPP), 2017; data used for I-476 is for area between I-76 and I-95; data used for I-95 is for area between Delaware state line and Philadelphia City boundary.

ANALYSIS

The information above reflects a planned travel time index on the two main interstates through the County: I-95 and I-476 (the Blue Route). It compares how long it would take a person to drive through the County if they were able to travel freely at the speed limit (without traffic) to the amount of time a person needs to plan on traveling in order to account for traffic. Simply, the index indicates how much longer a trip takes due to congestion. While not representative of all roadways and modes of travel in the County, these two highways play an important role in traffic movement across the County. As they become congested and efficiency drops, motorists are more inclined to use local roadways in an attempt to bypass the highways.

The planned travel time index has increased dramatically since 2011. In 2012, the planned travel time for northbound traffic on I-476 during the PM peak was slightly higher than speed limit time at an index of 1.25. By 2016, this increased to 2.25, or more than double the speed limit time. The most congested segments during the PM peak on I-476 are near the MacDade Boulevard intersection, north of the ramps from I-95, and southbound traffic between Route 30 and PA-3.

TRANSPORTATION PLAN ECONOMIC DEVELOPMENT



RECENT EFFORTS

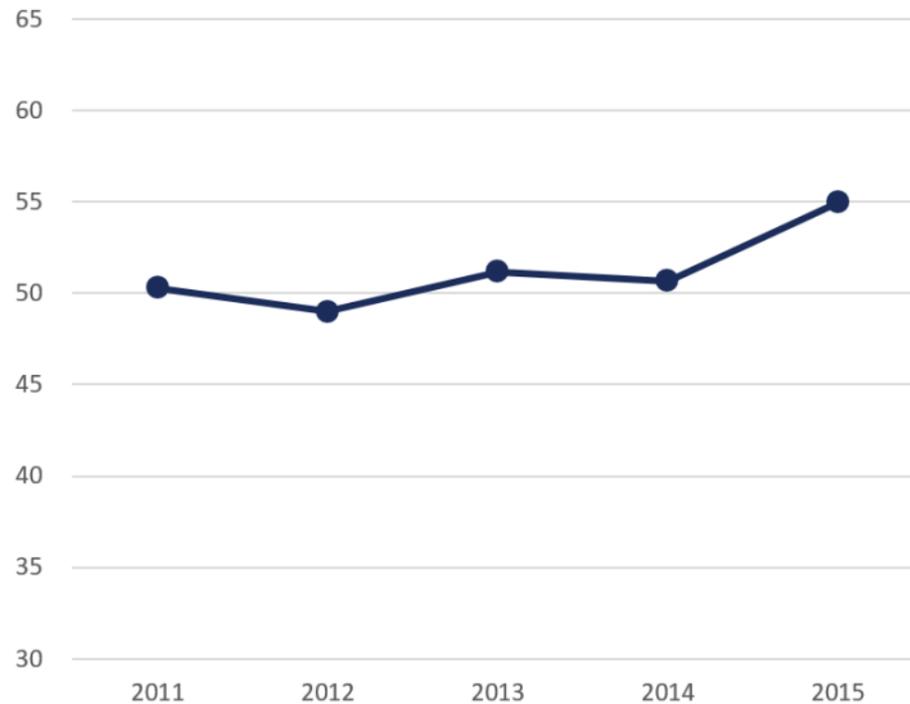
PennDOT modified several ramps at the I-95/I-476 interchange to increase movement of vehicles through this section, which has historically been a bottleneck on both corridors. Efforts continue to encourage multi-municipal cooperation; the West Chester Pike Coalition, led by the County, is a group of municipalities working to identify and implement strategies to improve the safety and efficiency of West Chester Pike.

TRAFFIC CRASH RATE

SIGNIFICANCE

Traffic crashes are an indicator of the overall function and safety of the County's road network. While a variety of underlying factors may be involved in accidents, the frequency, timing, and location of auto collisions and other roadway incidents can provide insight into the need for improvements to the County road system.

Crashes per 1 million Vehicles Mile Traveled



Data Source: PennDOT, 2016

ANALYSIS

While the change in year-over-year crash rate (total crashes per 1 million vehicle miles traveled) in Delaware County has fluctuated, it has trended downward significantly over the last two decades. Between 1997 and 2015, the number of annual crashes on roadways in Delaware County decreased by 13 percent. Better enforcement of laws and education of drivers are both contributing factors of this trend. Similarly, safety improvements to vehicles has contributed to a decrease in traffic deaths from crashes.

The slight increase in 2015 is not a locally-specific issue; the crash rate across the country has seen a similar increase that is widely attributed to distracted drivers. Distracted driving has quickly become an important safety concern as more technology, including cell phones and dashboard devices, are at drivers' fingertips. Other factors such as the design of intersections, aggressive driving, and speeding continue to affect the crash rate across the region.

TRANSPORTATION PLAN



RECENT EFFORTS

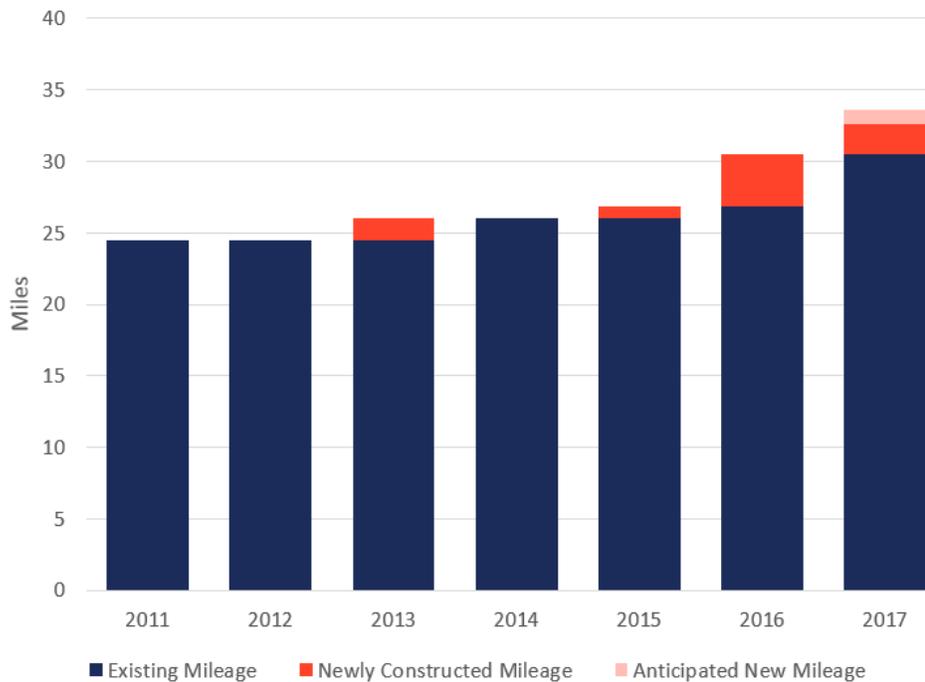
The County is completing the transportation component of Delaware County 2035, which will help to guide local planning and implementation efforts to improve the safety of the transportation network. The plan also includes analysis of crash rates to identify priority improvement areas. Construction for the long-awaited widening of US 322 began in March 2017; this project will include substantial safety improvements, particularly at intersections.

PRIMARY TRAIL NETWORK

SIGNIFICANCE

The Primary Trail Network is a countywide system of multi-use trails identified to connect recreational and cultural hubs across the County. It was adopted as part of the Delaware County *Open Space, Recreation, and Greenway Plan* in 2015 to direct the energies of the County and municipalities into developing a cohesive trail network that provides access across the County.

Primary Trail Network—Miles Completed



Data Source: Delaware County Planning Department, 2017

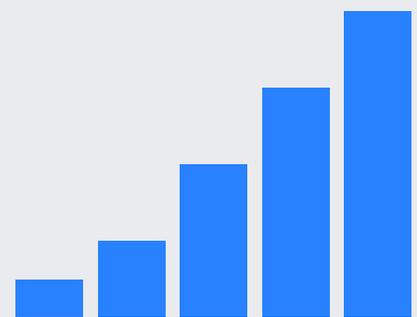
ANALYSIS

There was a significant increase in completed trails on the countywide Primary Trail Network in 2016. It is important to emphasize that development of regional trails takes years of planning, engineering, and construction. For this reason, progress on the Primary Trail Network may vary greatly from year-to-year and, as with all metrics in this report, the trend over time should be stressed.

The substantial increase in 2016 was the result of several trail openings that were the culmination of years of work on complex projects. In order for this level of progress to continue, it is important to program the timing of various trail projects in order to match with appropriate funding sources and local capacity to oversee and manage implementation. The County and local municipalities are completing this by simultaneously progressing trails through various stages of planning and design.

OPEN SPACE PLAN

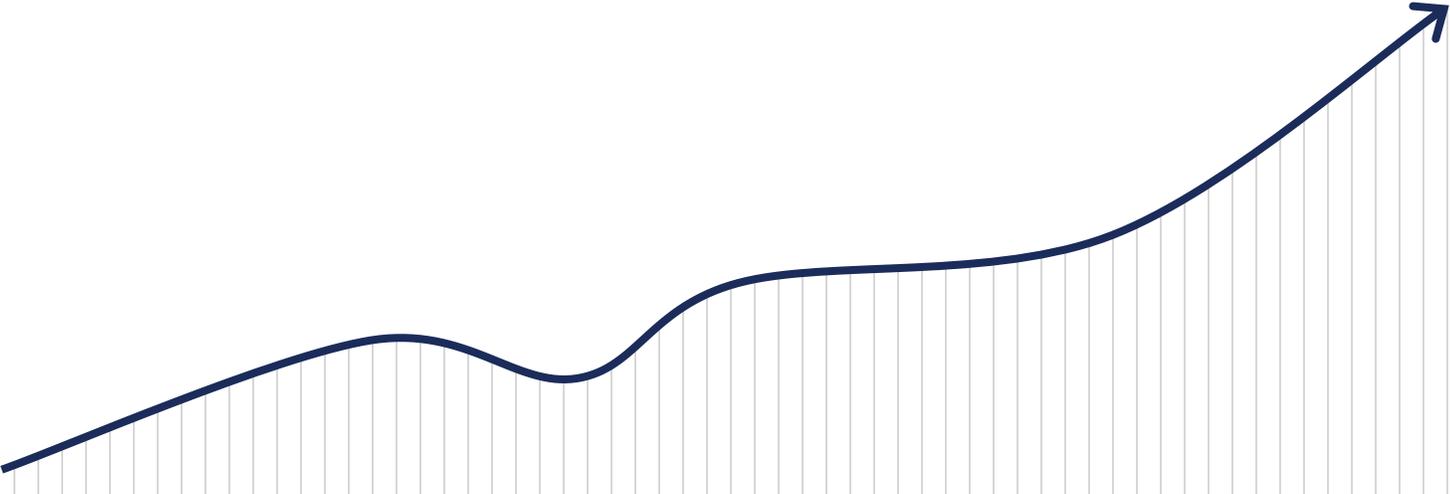
TRANSPORTATION PLAN



EXCEPTIONAL STRENGTH OF PROGRESS

RECENT EFFORTS

After over twenty years of planning and design, Phase I of the Chester Creek Trail, consisting of 2.8 miles in Middletown and Aston Townships, opened to the public in late-2016. Haverford continued expansion of its trail system by opening up a 0.86-mile segment of the Newtown Square Branch Rail Trail, referred to locally as the “Pennsy Trail.” With several other trail segments beginning or nearing construction this past year, 2017 is poised to be another milestone year.



EXISTING DATA GAPS

At this time, there are several important metrics for tracking progress towards the goals of Delaware County 2035 that cannot be measured due to a lack of available data. Since the Implementation Metrics Report is the beginning of the process of tracking progress, the County will develop methods to track progress and collect data that is currently not available.

DEVELOPMENT PATTERNS

Delaware County 2035, the County's comprehensive plan, calls for development patterns that fit within the established Community Framework, which identified Character Areas and Central Places. In accordance with Pennsylvania Act 247, the Municipalities Planning Code (MPC), the County Planning Commission reviews development proposals for general consistency with Delaware County 2035; however, more detailed information regarding location of development (e.g., is the proposal an infill project in a Central Place?) will help the amount and type of development occurring across the County. The County is in the process of identifying best approaches to incorporating this data into the subdivision and land development review process.

PROTECTED OPEN SPACE

While there is data available for the total acreage of open space protected, the amount of newly protected open space for each year is not available. The County is working to adjust its process in order to collect data on when open space is protected in order to accurately track progress over time. There has been important progress over the last few years, such as the acquisition of 33 acres of land adjacent to Little Flower Manor in Darby Borough, and it is important to track over time.

PROTECTED HISTORIC RESOURCES

The protection of significant historic resources is vitally important in maintaining the character of communities across Delaware County. There are many different approaches for communities to take in protecting historic resources.

Similarly, there are several levels of protection which make it difficult to quantify how many resources are "protected" at this time. The County's *Historic Preservation Plan*, which is currently under development, acknowledges this as an important information gap. An early action of the draft plan is to identify and implement the most feasible data collection process – this will help the County further track progress in protecting significant historic resources.