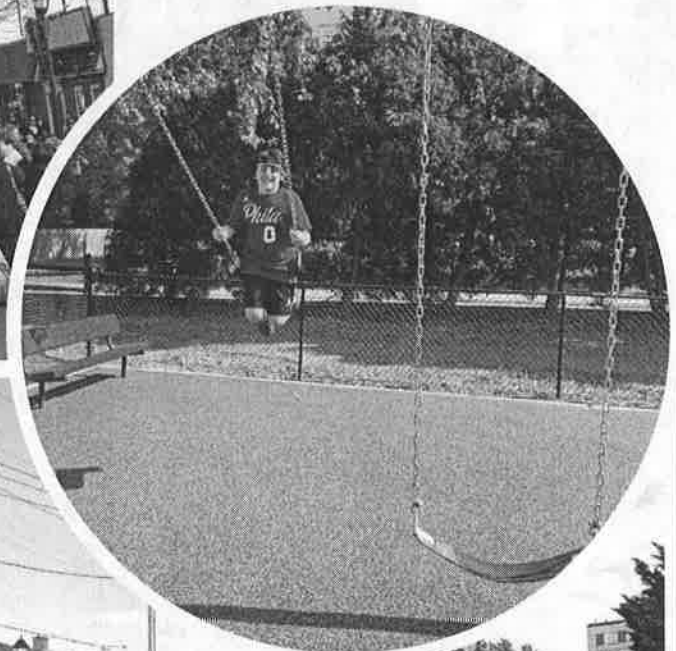


# Who Are Our Neighbors?

A demographic profile of the occupants of Montgomery County's residential development



March 2025





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# Definitions

To provide some clarity for this report, these are terms that will be used throughout this document, defined below. Some are officially defined by the U.S. Census Bureau, while others (i.e. new and existing units) are defined based on the scope of this report. More information on official U.S. Census terminology can be found at [https://www2.census.gov/programs-surveys/acs/tech\\_docs/subject\\_definitions/2023\\_ACSSubjectDefinitions.pdf](https://www2.census.gov/programs-surveys/acs/tech_docs/subject_definitions/2023_ACSSubjectDefinitions.pdf).

**New Units** - Housing structures that were built from 2010 through 2021

**Existing Units** - Housing structures that were built from pre-1939 through 2009

**Household** - The total number of people who occupy a housing unit

**Householder** - The person in whose name a housing unit is owned or rented

**Housing Unit** - A house, apartment/group of rooms, mobile home, or a single room that is occupied as separate living quarters

**Public School-Age Children** - Children attending public schools who are enrolled in grades K-12

**Demographic Multipliers** - The average ratio of a population subset, per household or housing unit

**Single-Family Detached** - A housing unit that is detached from any other housing units

**Single-Family Attached** - A housing unit that has one or more shared vertical party walls and is structurally attached to at least one or more units (i.e. a twin, townhouse or rowhouse)

**Multifamily** - A structure or complex consisting of two or more apartment units

## Introduction

The Montgomery County Planning Commission (MCPC) analyzes population and household data to better understand who lives in new and existing housing units throughout the county. MCPC consistently gets inquiries on the effects – positive, negative, or otherwise – of newly built housing on the infrastructure and services provided by the County, its municipalities, and its school districts. The Planning Commission frequently hears concerns about the influx of schoolchildren resulting from new housing units, particularly multifamily development. Some of the key outcomes in this analysis are updated demographic multipliers, specifically for household size and students enrolled in public school. These calculations help us, and others, to project school enrollment impacts and overall population based on potential residential development. These multipliers are also valuable for aiding in population projections, predicting potential development impact, understanding the varying needs of different age groups and providing insight for market studies.

This document serves as an update to MCPC's 2012 report, although the methodology is different and is explained further on the next page. It is divided into three main parts—Public School Students, Age Breakdown, and Households. For easy referencing, the Appendix includes charts on the overall multipliers divided into Public Use Microdata Areas (PUMAs), which are non-overlapping, statistical geographic areas that partition the county (and the rest of the country) into geographic areas with no fewer than 100,000 people each. Montgomery County has six PUMAs. More information on the U.S. Census Bureau's PUMAs can be found here: [https://www.census.gov/programs-surveys/geography/guidance/geo-areas/pumas.html#:~:text=Public%20Use%20Microdata%20Areas%20\(PUMAs\)%20are%20non%20overlapping%2C,%20Puerto%20Rico%20and%20Guam](https://www.census.gov/programs-surveys/geography/guidance/geo-areas/pumas.html#:~:text=Public%20Use%20Microdata%20Areas%20(PUMAs)%20are%20non%20overlapping%2C,%20Puerto%20Rico%20and%20Guam)

While this report may provide insight on the county's population across housing types, it is important to note that this information should not be used as justification to exclude certain housing types from the development landscape. This data, no matter how detailed, cannot predict population or household growth with 100% accuracy and cannot account for unexpected events and the nuance of individual preferences. Nor do statistics necessarily imply causality. For instance, not all households with children prefer single-family detached homes, not all seniors want to age in place or downsize to an apartment. This study allows planners and other stakeholders to reasonably predict the student enrollment in a given area and to assess the potential impact of future development on how communities might grow and change.

# Background

Between 2000 and 2010, Montgomery County gained 50,887 people according to the U.S. Census Bureau, and another 56,679 between 2010 and 2020. Between 2010 and 2020, the County grew at nearly three times the rate of Pennsylvania. Birth rates have generally slowed, but migration into the County remains strong. And while there was a decrease in residential units built in 2021—a year into the Covid-19 Pandemic—construction somewhat rebounded by 2022 and 2023 (2,770 and 2,419 units, respectively), when the number of units built surpassed the previous ten-year average.

Since 2010, nearly 30,000 housing units have been built, and this growth will only continue. The Delaware Valley Regional Planning Commission projects that Montgomery County will see a 12.7% increase in population through 2050, the second highest percent increase among the 5-County DVRPC region. This study also comes in the midst of notable trends—the continuing aging population and the growing calls for housing affordability have important policy implications. Do the county's housing units provide the right mix of housing types to house the people who live here, or want to live here?

# Methodology

The methodology for this report changed from the previous (2012) version due to the different ways that the Census Bureau publishes its data. The original report used data from the 2000 and 2010 decennial censuses, and isolated census blocks (the smallest geographic unit available for analysis) that had only one housing type. This gave us a somewhat lopsided dataset, in that there were not that many “new” blocks created in the 2010 Census that didn't exist in 2000. But it did allow MCPC to have an analysis that could measure the total population, as well as various household types and age groups, by different housing types (both newly constructed and already built units). The prior study also analyzed a slightly different measure of school aged children, in that we looked at children between the ages of 5 and 17 (which is similar to, but not the same, as the “enrolled in public school” measure that we used this time around).

These statistics are no longer collected during the decennial census. To obtain and analyze the necessary demographics, MCPC utilized the Public Use Micro Sample (PUMS) data files from the US Census Bureau. PUMS consists of untabulated data from the American Community Survey about individual people and housing units. There is complete anonymity in the data, but it allows researchers to cross-tabulate among many different demographic variables to assess population trends in ways that the standard American Community Survey and decennial census don't otherwise aggregate for general use. This study uses the American Community Survey 5-year estimates data set from 2017-2021.

The study uses Grade Level Attending, Age, Household Type, Year Built and Units in Structure data to determine the breakdown of the general population, children attending public school, and households among detached, attached, and multifamily homes. Homes built through 2009 were designated as ‘existing’ while homes built between 2010 and 2021 were considered ‘new’. Including multiple years-worth of units as ‘new’ provides a larger sample size and mitigates the potential skewing that using only a year or two could cause.



## Children Enrolled in Public School

Despite multifamily and attached housing comprising the majority of new housing units built across the county in recent years, single-family detached units still make up the majority of the county's housing stock and collectively generate the most public school-enrolled children. The lure of more space may still be a big factor in home purchasing or renting decisions. Single-family detached homes, particularly newer ones, are generally producing the most school children per housing unit. One hundred new detached homes for example, would introduce 61 new students to a school district, as opposed to 31 for new attached and 7 for new multifamily units. The smaller number of public school-enrolled children coming from existing detached units may be due to empty nesters continuing to live there.

Contrary to the perception that multifamily housing brings in too many people – and too many schoolchildren – for the tax income that municipalities receive in return, the data continues to show that multifamily units tend to have fewer public school-enrolled children per unit than other types of homes. A shift from our prior research on this topic is that existing single family attached homes tend to have about the same number of public school-enrolled children as existing detached homes. This could reflect a growing demand for townhomes or potentially point to an affordability issue, particularly since the housing stock attracting these families are existing units.

Table 1: Children Enrolled in Public School

	Students Per Existing Unit	Students Per New Units
Single-Family Detached	.42	.61
Single-Family Attached	.44	.31
Multifamily	.14	.07

2017-2021 ACS 5-Year Estimates

## Age of Residents

School-aged children and children under 5 make up a similar proportion of the population as they did roughly a decade ago. The main story here is the growing number of older residents. Along with the rest of the country, Montgomery County residents continue to age. The median age of county residents is 41, up 3 years from the median age in 2000. Residents ages 65 and up comprise nearly a quarter of those in new and existing multifamily units. This could reflect the rise of 55+ communities that have developed over the past few decades. Senior housing developments continue to make up a sizable portion of new development in the county, with over 4,000 units constructed in the past ten years. The growing number of older residents will affect the county's labor force, industry makeup, and housing preferences in the decades to come.

Table 2: Ages of Residents in New Housing Units

	Number of People Living in New Units	Percent	Single-Family Detached		Single-Family Attached		Multifamily	
			Number of People	Percent	Number of People	Percent	Number of People	Percent
Total	37,103		15,778		12,006		8,899	
Under Age 5	2,781	7.50%	1,473	9.34%	1,098	9.15%	210	2.36%
Ages 5-17	6,437	17.35%	4,086	25.90%	1,833	15.27%	518	5.82%
Ages 18-24	1,530	4.12%	627	3.97%	287	2.39%	616	6.92%
Ages 25-34	6,445	17.37%	1,249	7.92%	2,630	21.91%	2,566	28.83%
Ages 35-44	7,033	18.96%	3,449	21.86%	2,424	20.19%	1,160	13.04%
Ages 45-54	4,216	11.36%	2,461	15.60%	808	6.73%	947	10.64%
Ages 55-64	3,857	10.40%	1,516	9.61%	1,612	13.43%	729	8.19%
Ages 65 and over	4,384	11.82%	917	5.81%	1,314	10.94%	2,153	24.19%

2017-2021 ACS 5-Year Estimates

Table 3: Ages of Residents in Existing Housing Units

	Number of People Living in Existing Units	Percent	Single-Family Detached		Single-Family Attached		Multifamily	
			Number of People	Percent	Number of People	Percent	Number of People	Percent
Total	810,978		510,265		165,981		134,732	
Under Age 5	44,999	5.55%	26,350	5.16%	11,064	6.67%	7,585	5.63%
Ages 5-17	141,877	17.49%	99,634	19.53%	29,330	17.67%	12,913	9.58%
Ages 18-24	52,764	6.51%	31,277	6.13%	11,444	6.89%	10,043	7.45%
Ages 25-34	95,401	11.76%	40,507	7.94%	24,638	14.84%	30,256	22.46%
Ages 35-44	108,329	13.36%	64,089	12.56%	26,618	16.04%	17,622	13.08%
Ages 45-54	109,170	13.46%	78,564	15.40%	18,973	11.43%	11,633	8.63%
Ages 55-64	116,731	14.39%	83,366	16.34%	19,357	11.66%	14,008	10.40%
Ages 65 and over	141,707	17.47%	86,478	16.95%	24,557	14.80%	30,672	22.77%

2017-2021 ACS 5-Year Estimates

## Household Composition

Household types are another important factor in understanding Montgomery County’s makeup, as they can provide insight into housing situations that age breakdown cannot. When it comes to average household size, single-family detached homes still rule the day, but the average household size did decline slightly since the last report. Meanwhile, new and existing single-family attached units saw a slight increase in average household size, reflecting the changing construction trends over the past decade. Multifamily units still generate the smallest household sizes which, as the figures below show, have important implications as well.

Trends notwithstanding, single-family detached homes are historically the most common housing type in the county, so it’s no surprise that they house the largest share of married couples with children. Existing single-family detached homes have a higher percentage of married couples with no children than newly built single-family detached homes, possibly due to empty nesters continuing to live in their long-time homes after their children have moved elsewhere. Multifamily units have the largest share of single-person householders, constituting over half of new and existing units. They also have a higher share of cohabitating couples without children. In general, single-family attached and multifamily units had larger shares of single parent households, with a disproportionate number being female-headed. And while they weren’t a large proportion, householders caring for relatives made up anywhere from three to eight percent across each new and existing type. As the population of older residents grows, it is important to consider the needs of householders who increasingly take on a caretaker role.

Table 4. Average Household Size

	Existing Units	New Units
Single-Family Detached	2.80	3.26
Single-Family Attached	2.56	2.48
Multifamily	1.75	1.52

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Table 5: Household Composition in New Units

	Single-Family Detached		Single-Family Attached		Multifamily	
	Number	Percent of Households	Number	Percent of Households	Number	Percent of Households
Total Households (countywide)	4,840		4,842		5,858	
Married couples with own children (under 18)	2,607	53.86%	1,442	29.78%	116	1.98%
Married couples, no own children (under 18)	1,395	28.82%	1,698	35.07%	911	15.55%
Unmarried couple with own children (under 18)	27	0.56%	90	1.86%	0	0.00%
Unmarried couple, no own children (under 18)	49	1.01%	279	5.76%	661	11.28%
Female householder, living alone	313	6.47%	529	10.93%	2,196	37.49%
Female householder, with own children (under 18)	56	1.16%	201	4.15%	320	5.46%
Female householder, living with relatives, not own children (under 18)	95	1.96%	127	2.62%	33	0.56%
Female householder, living with nonrelatives	0	0.00%	22	0.45%	213	3.64%
Male householder, living alone	92	1.90%	343	7.08%	1,240	21.17%
Male householder, with own children (under 18)	25	0.52%	55	1.14%	12	0.20%
Male householder, living with relatives, not own children (under 18)	181	3.74%	37	0.76%	156	2.66%
Male householder, living with nonrelatives	0	0.00%	19	0.39%	0	0.00%

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Table 6: Household Composition in Existing Units

	Single-Family Detached		Single-Family Attached		Multifamily	
	Number	Percent of Households	Number	Percent of Households	Number	Percent of Households
Total Households (countywide)	176,800		60,041		72,098	
Married couples with own children (under 18)	51,764	29.28%	12,473	20.77%	5,643	7.83%
Married couples, no own children (under 18)	72,791	41.17%	17,235	28.71%	10,573	14.66%
Unmarried couple with own children (under 18)	1,867	1.06%	1,821	3.03%	997	1.38%
Unmarried couple, no own children (under 18)	4,538	2.57%	2,889	4.81%	4,215	5.85%
Female householder, living alone	16,723	9.46%	8,906	14.83%	22,333	30.98%
Female householder, with own children (under 18)	4,017	2.27%	3,845	6.40%	4,311	5.98%
Female householder, living with relatives, not own children (under 18)	7,379	4.17%	3,251	5.41%	2,874	3.99%
Female householder, living with nonrelatives	536	0.30%	625	1.04%	1,264	1.75%
Male householder, living alone	11,362	6.43%	5,621	9.36%	16,136	22.38%
Male householder, with own children (under 18)	1,548	0.88%	1,154	1.92%	978	1.36%
Male householder, living with relatives, not own children (under 18)	3,292	1.86%	1,653	2.75%	1,351	1.87%
Male householder, living with nonrelatives	983	0.56%	568	0.95%	1,423	1.97%

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## Conclusion

Montgomery County has changed a lot over the past decade. With an aging population and a housing stock that reflects the increasing numbers of attached and multifamily units built in the county, these updated statistics show a potential shift in the demographic impacts of new development. Regardless, local governments should continue to encourage a variety of housing types to adequately provide for new and existing residents. Municipalities should make every effort to plan for a healthy mix of housing types and sizes, to allow for reasonable growth while accommodating the varying housing needs of the people who call Montgomery County home.



# Appendix

Map 1: PUMA Regions in Montgomery County

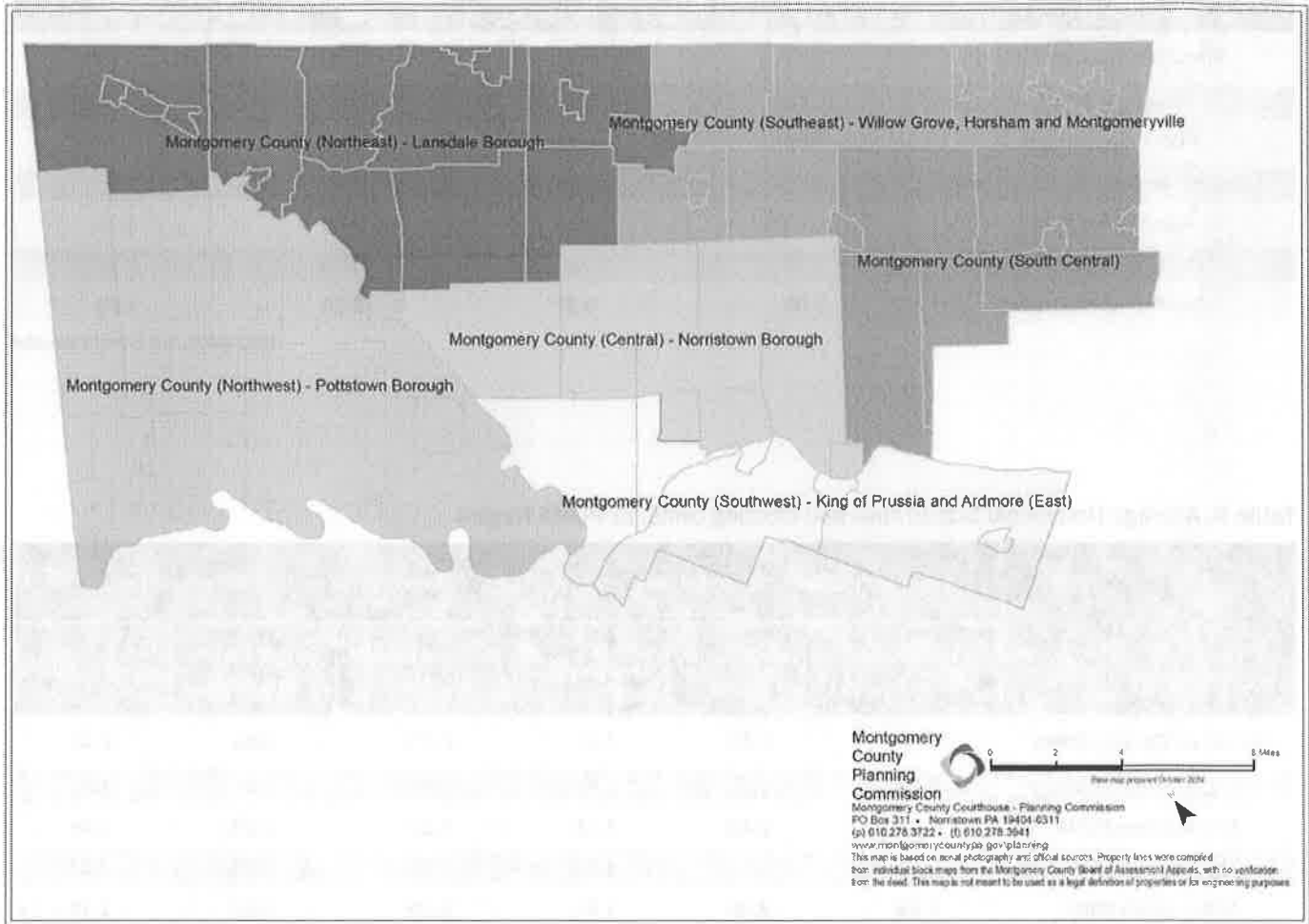


Table 7: Children Enrolled in Public School in New and Existing Housing Units, by PUMA Region

	Students per Existing Unit			Students per New Unit		
	Single-Family Detached	Single-Family Attached	Multifamily	Single-Family Detached	Single-Family Attached	Multifamily
Pottstown Borough PUMA	0.45	0.47	0.17	0.45	0.29	0.15
Lansdale PUMA	0.43	0.44	0.19	0.79	0.37	0.17
KOP Ardmore PUMA	0.40	0.26	0.11	0.63	0.04	0.04
Norristown PUMA	0.33	0.34	0.13	0.51	0.06	0.00
Willow Grove PUMA	0.42	0.38	0.11	0.79	0.72	0.03
South Central PUMA	0.39	0.34	0.14	0.71	0.26	0.12

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Table 8. Children Enrolled in Public School in New and Existing Multifamily Units, by Tenure

Region	Students/Multifamily Existing Unit		Students/Multifamily New Unit	
	Own	Rent	Own	Rent
Pottstown Borough PUMA	0.11	0.21	0.00	0.18
Lansdale PUMA	0.11	0.22	0.00	0.20
KOP Ardmore PUMA	0.02	0.16	0.00	0.04
Norristown PUMA	0.00	0.17	0.00	0.00
Willow Grove PUMA	0.09	0.13	0.00	0.05
South Central PUMA	0.11	0.16	0.00	0.16
<b>Countrywide Average</b>	<b>0.06</b>	<b>0.17</b>	<b>0.00</b>	<b>0.09</b>

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Table 9. Average Household Size in New and Existing Units, by PUMA Region

	Average Household Size-Existing Units			Average Household Size-New Units		
	Single-Family Detached	Single-Family Attached	Multifamily	Single-Family Detached	Single-Family Attached	Multifamily
Pottstown Borough PUMA	2.80	2.68	1.77	3.15	2.61	1.41
Lansdale PUMA	2.80	2.66	1.92	3.61	2.27	1.51
KOP Ardmore PUMA	2.82	2.40	1.74	3.27	2.23	1.49
Norristown PUMA	2.76	2.57	1.66	3.27	2.24	1.47
Willow Grove PUMA	2.89	2.40	1.83	3.26	2.67	1.49
South Central PUMA	2.73	2.61	1.63	3.07	2.96	1.76
<b>Total</b>	<b>2.80</b>	<b>2.56</b>	<b>1.75</b>	<b>3.26</b>	<b>2.48</b>	<b>1.52</b>

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Table 10. 2012 Report Data

	Average Household Size		School-Aged Children per Household	
	Existing Units	New Units	Existing Units	New Units
Single-Family Detached	2.85	3.51	.55	.93
Single-Family Attached	2.53	2.22	.41	.21
Multifamily	1.82	1.67	.18	.06

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Table 11. Age of Residents In by Existing Multifamily Units—Expanded by Building Size

Existing Units	Multifamily Total		2 Units		3-4 Units		5-9 Units		10-19 Units		20-49 Units		50 or More Units	
	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied
Total	<b>134,732</b>		<b>21,761</b>		<b>19,831</b>		<b>19,600</b>		<b>20,308</b>		<b>16,324</b>		<b>36,908</b>	
Under Age 5	7,585	5.63%	1,954	8.98%	878	4.43%	1,415	7.22%	1,260	6.20%	941	5.76%	1,137	3.08%
Ages 5-17	12,913	9.58%	3,392	15.59%	2,912	14.68%	2,142	10.93%	1,763	8.68%	1,094	6.70%	1,610	4.36%
Ages 18-24	10,043	7.45%	1,696	7.79%	1,663	8.39%	1,804	9.20%	1,509	7.43%	1,269	7.77%	2,102	5.70%
Ages 25-34	30,256	22.46%	4,821	22.15%	4,275	21.56%	4,889	24.94%	5,050	24.87%	3,839	23.52%	7,382	20.00%
Ages 35-44	17,622	13.08%	2,789	12.82%	3,319	16.74%	2,514	12.83%	3,354	16.52%	1,978	12.12%	3,668	9.94%
Ages 45-54	11,633	8.63%	2,170	9.97%	2,100	10.59%	1,813	9.25%	1,983	9.76%	1,086	6.65%	2,481	6.72%
Ages 55-64	14,008	10.40%	2,587	11.89%	2,240	11.30%	2,097	10.70%	2,089	10.29%	1,441	8.83%	3,554	9.63%
Ages 65+	30,672	22.77%	2,352	10.81%	2,444	12.32%	2,926	14.93%	3,300	16.25%	4,676	28.64%	14,974	40.57%

Table 12. Age of Residents in New Multifamily Units—Expanded by Building Size

New Units	Multifamily Total		2 Units		3-4 Units		5-9 Units		10-19 Units		20-49 Units		50 or More Units	
	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied	Number of People	Percent of Those Studied
Total	<b>8,899</b>		<b>578</b>		<b>531</b>		<b>613</b>		<b>1,085</b>		<b>1,399</b>		<b>4,693</b>	
Under Age 5	210	2.36%	25	4.33%	0	0.00%	17	2.77%	30	2.76%	64	4.57%	74	1.58%
Ages 5-17	518	5.82%	0	0.00%	114	21.47%	113	18.43%	102	9.40%	68	4.86%	121	2.58%
Ages 18-24	616	6.92%	9	1.56%	186	35.03%	0	0.00%	56	5.16%	46	3.29%	319	6.80%
Ages 25-34	2,566	28.83%	294	50.87%	54	10.17%	96	15.66%	156	14.38%	425	30.38%	1,541	32.84%
Ages 35-44	1,160	13.04%	87	15.05%	92	17.33%	52	8.48%	115	10.60%	72	5.15%	742	15.81%
Ages 45-54	947	10.64%	102	17.65%	69	12.99%	118	19.25%	0	0.00%	227	16.23%	431	9.18%
Ages 55-64	729	8.19%	22	3.81%	0	0.00%	97	15.82%	27	2.49%	114	8.15%	469	9.99%
Ages 65+	2,153	24.19%	39	6.75%	16	3.01%	120	19.58%	599	55.21%	383	27.38%	996	21.22%

