

Delaware Demographic Assessment

Mid-Atlantic Association of Community Health Centers
March 1, 2011

Prepared by: Parker Cohen
Community Development Manager



Table of Contents

| | |
|-----------------------------|----|
| Statement of Purpose | 3 |
| Executive Summary..... | 3 |
| Methodology..... | 4 |
| Overall Trends | 6 |
| Implications for CHCs..... | 7 |
| Population Analysis | 8 |
| UDS Analysis | 9 |
| Racial/Ethnic Analysis..... | 10 |
| Poverty Analysis | 14 |
| Home Value Analysis..... | 15 |
| Income Analysis | 16 |
| Limitations..... | 18 |
| Conclusion | 18 |



Statement of Purpose

The purpose of this report is to provide a comprehensive assessment of the demographic situation in Delaware's three counties, Sussex, Kent, and New Castle. This report aims to provide CHC stakeholders with the information needed to make informed decisions pertaining to all facets of strategic planning. Health center stakeholders should use this report to address the following issues:

- Based on changing demographics, where should future sites be located?
- How have demographic shifts affected a health center's patient population?
- What external demographic challenges does a health center face?
- What opportunities can demographic change offer for health center growth and market capture?

For each county, this report examines trends in population, CHC usage data, poverty levels, housing, income, and race/ethnicity. The goal is to provide the best picture of demographic trends from the last few years at appropriate geographic levels. Each regional section examines data from years 2005-2009, with some sections detailing patterns for the years 2000-2009. With this report, CHC stakeholders should gain a greater understanding of the demographic trends in their local areas, counties, and regions, and use the report to guide their planning decisions.

Executive Summary

The demographic landscape holds vital importance for Delaware community health centers. The major demographic trends in Delaware mirror much of the nation's. The state is diversifying, becoming less white and more Latino/Hispanic. The state's population continues to grow, and this growth is being driven by minorities, particularly black and Latino/Hispanic residents. Additionally, the state appears to be growing more stratified by income, as income growth in richer areas is outpacing that of less affluent areas. These changes hold many implications for Community Health Centers (CHCs) throughout the state. Every facet of CHC governance, from site location to patient attraction and retention, is impacted by the continually changing demographic situation of the state.

The two primary changes that have occurred in the years between 2005 and 2009 are continued diversification slowed income growth. The percentage of white residents in all three of the state's counties has declined in this period, and in two of the three counties the black population has risen. Likewise, the Latino/Hispanic population grew in two of the three counties (Sussex County data is unavailable). Meanwhile, in two of the counties, New Castle and Kent, the



median income of the county did not nearly grow with the rate of inflation. Sussex County's incomes, however, outpaced inflation.

In Kent County, the population is becoming less white and increasingly black and Latino. Concurrently, during this period there was a nearly two percentage point increase in poverty and only a six percent gain in income. Because of the increasing diversification, increasing poverty, and stagnating income growth CHCs should watch and consider shifting resources towards Kent County. Sussex County, the home of the state's beaches, is the southernmost county. Sussex has a strong agricultural sector and saw population gains similar to Kent County. Sussex County featured declines in both white and black populations. Unlike neighboring Kent County, poverty declined slightly over the period for Sussex County. However, corresponding American Community Survey data for Latino populations is not available for Sussex County; the 2010 decennial census data will feature this information.

In New Castle County, we have the advantage of being able to examine results at a more local level, especially in Wilmington and its surrounding areas. Given the close-up view, we are able to see that this county's results mirrored much of the state's. The area diversified: three of the four areas examined became less white. Population grew in all but one area, the central city of Wilmington. However, incomes did not rise with inflation in any of the areas except for the highest income are, which accounted 75 percent of the county's income growth. This is indicative of high stratification in the area, and should be a concern for area CHCs.

In order for CHCs to maintain their current patient levels and to expand into new markets, they must become aware of these demographic shifts. Many areas of the state, including Kent and New Castle Counties, are seeing increased stratification as incomes are stagnating for many. CHCs will have to ensure that individuals who are becoming poorer relative to the state and nation are aware of their services. Additionally, with the rise of the Latino/Hispanic population, the state has not seen a corresponding increase in Latino/Hispanic patients. Delaware CHCs must work to provide sufficient outreach and language services for these populations. With the upcoming implementation of the PPACA, CHCs should work to identify patients who will still be uninsured in 2014. Moreover, the share of CHC patients who are not impoverished has declined in recent years. With the upcoming implementation of the Patient Protection and Affordable Care Act, CHCs will have to attract more patients who are above 150 percent of the poverty line.

As mentioned above, only for New Castle County was data available below the county level. However, as the 2010 census data comes out throughout the year, we will update this report to ensure that it contains the most current data and analysis.

Methodology

This report breaks down the demographic situation in Delaware's three counties: the southern Sussex County, the central Kent County, and the northern New Castle County. Within each of these regions we have examined population, race/ethnicity, housing, income, and CHC usage



data. From these data, we have gauged statewide, county, and local trends. For all of the three counties, we used U.S. Census American Community Survey One Year Estimates (years 2005, 2007, 2009) to measure changes over time. In New Castle County, we have used Public Use Microdata Area (PUMA) data to investigate trends at the local level in addition to the county-level. The PUMA districts can be viewed in Map 1 below.

Unfortunately, PUMA data is not available for all counties, so county-level data was used exclusively in other sections. Thus we have a good idea of the local demographic trends in the Wilmington area, but not in other areas of the state.

Map 1: Delaware Counties and PUMA Districts



The indicators chosen for this report (population, race/ethnicity, UDS data, poverty rates, median home value, and median household income) all have value for CHCs. Population counts allow us to measure migrations and to learn which areas are growing, declining, or stagnating. The race/ethnicity data help provide a strong understanding of local, regional, and statewide demographic shifts. UDS data for race/ethnicity of patients and income of patients allow us to see if overall demographic shifts are being seen at the CHCs; they also allow us to gauge new



trends, such as income changes in CHC patients that can't be seen in the overall data. Poverty rates, alone and especially paired with demographic shifts, allow us to see which areas are seeing a greater need for services and to identify the spatial organization of potential health center patients. Median home values help us assess the desirability of a location, and can also be a proxy for gentrification when coupled with other trends. Finally, median household income allows us to gauge changes in affluence in a given area. Combining these indicators allows the reader to determine how demographic shifts will impact their individual neighborhoods, cities, and counties.

Overall Trends

While the state showed demographic change over the last five years, the changes are less drastic than its neighbor Maryland. However, these changes illuminated many trends in the state, among them are increasing diversity, uneven growth in income and population, and trends in health center usage that run counter to the overall demographic trends.

Increasing Diversity

Delaware's percentage of residents that are white declined between 2005 and 2009, and the state has become more diverse in most areas. At the same time, the black and Hispanic/Latino populations have grown significantly in this period. The Hispanic/Latino population in particular has been driving growth in many areas, growing over 32 percent in Kent County and 21 percent New Castle County. At the local level in New Castle County, these trends are apparent overall. While there is no data available for Hispanic/Latino residents, the white population is declining in three of the four areas, and the black population is growing in three out of four of the areas.

Uneven Growth

The overall population of Delaware showed strong growth during this period. New Castle County, the home of the city of Wilmington, showed the strongest growth by adding over 29,000 residents. Forty percent of the state's growth came from New Castle County, with the Wilmington region accounting for much of these gains. However, this population growth has not necessarily led to greater prosperity. While the state's population has grown, Delaware saw little in terms of growth in income. Between 2005 and 2009, the state's median incomes did not rise with the rate of inflation. Only the southern Sussex County saw its median incomes surpass the rate of inflation in the period, growing 12.33 percent over the 9 percent rate of inflation. Additionally, it appears that wealthier areas see their incomes rise, but the less affluent areas' growth is less sustained. This is leading to a state that is more stratified by income and location.



UDS Trends

In the UDS data, we can see that health center visits have increased between 2007 and 2009. However, two trends in the data are a cause for worry: the patients who are above 150 percent of the federal poverty line during the recession and the lack of growth in Hispanic/Latino patients. Both of these trends have strong implications for the future of Delaware CHCs.

Implications for CHCs

Attracting Hispanic/Latino Patients

Delaware's demographic trends hold many implications for CHCs. In terms of racial and ethnic demographic trends, the growth of the Hispanic/Latino population is the biggest change from recent decades. However, between 2007 and 2009, the number of Hispanic/Latino patients seen at Delaware CHCs declined. Delaware CHCs need to ensure that they have the language skills and outreach capabilities to attract and retain Hispanic/Latino patients. Moreover, with the upcoming implementation of the PPACA, CHCs will have to work to identify groups who will still be uninsured in 2014.

Increasing Stratification

The state shows a worrying trend of increasing income stratification. In New Castle County, it appears that more affluent areas are still seeing increases in income, while poorer communities are not seeing the same growth. This is an issue for CHCs, especially if the trends continue and the state's middle class shrinks. While the spatial presentation of need is not drastically changed (as traditionally wealthier areas are not becoming more impoverished), the lack of growth in lower income areas shows that the need for services is growing. If most of the wealth is being gained in one community, as appears to be happening in New Castle County, then the other communities are losing ground. Importantly, more patients in these areas should as a result fall into the lower income brackets and become target patients for CHCs. It is important for CHCs to follow these trends to ensure that they are conducting appropriate outreach to residents who might be unaware of CHC services.

Attracting Nontraditional CHC Patients

Continuing a trend seen in Maryland, the income cohorts of CHC patients has changed significantly. Fewer patients who have incomes over 150 percent of the poverty threshold are being seen at CHCs. It is possible that these patients have stopped visiting health centers, but this phenomenon is probably a result of these patients falling out of those cohorts and into more impoverished brackets. Regardless of the reason, it is important that CHCs seek out nontraditional patients who are above the poverty line. Because of the recession and high



jobless rates, many new residents are requiring safety net services. With the length of unemployment at its highest rate since the Great Depression, many newly jobless residents might remain so for the foreseeable future. It is important for CHCs to raise awareness of their services to attract these populations.

Also, it is critical for CHCs to plan for the changes in patient makeup that will occur in 2014. Once most residents have insurance through the PPACA, it will be important to both retain these patients and to attract new, nontraditional clients. CHCs should capture more market share by concentrating on attracting these patients who will be part of the upcoming exchanges.

Stagnating Incomes

Delaware as a whole showed little income growth between 2005 and 2009, with the exception of Sussex County. This stagnation in income growth and a state whose incomes do not keep up with inflation are worrying signs for safety-net service providers. With state incomes stagnating compared to the rest of the nation, more residents should be eligible for Medicaid and other public services. CHCs should consider working with outstation eligibility workers to enroll residents in Medicaid services. CHCs must work to ensure that their services are visible to populations who in the past were not in need of low-income services.

Population Analysis

Figure 1: Delaware Population by County, 2005-2009

| County | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|------------|---------|---------|---------|----------------|----------------|
| Kent | 140,205 | 152,255 | 157,741 | 17,536 | 12.51% |
| New Castle | 505,271 | 528,218 | 534,634 | 29,363 | 5.81% |
| Sussex | 173,111 | 184,291 | 192,747 | 19,636 | 11.34% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

Between 2005 and 2009, all three of Delaware’s counties experienced solid growth (see Figure 1). While New Castle had the slowest growth rate in the period, it still grew by nearly 30,000 residents. This nominal change was the largest gain in the state. Kent and Sussex grew comparably to each other, adding over 17,000 and 19,000 residents respectively.



Figure 2: Delaware Population by PUMA, 2005-2009

| PUMA District | 2005 | 2007 | 2009 | Percent Change |
|---------------|---------|---------|---------|----------------|
| 00101 | 139,061 | 150,743 | 151,067 | 8.63% |
| 00102 | 119,831 | 124,100 | 129,487 | 8.06% |
| 00103 | 118,106 | 119,984 | 117,474 | -0.54% |
| 00104 | 128,273 | 133,391 | 136,606 | 6.50% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

A close look at New Castle County shows three of the four PUMA districts grew comparably, while one, the area southwest of Wilmington, saw its population decline in this period (see Figure 2). Overall, the Wilmington area drove the growth in the county, with two of the three Wilmington-area PUMA districts growing at faster rates than the county as a whole.

UDS Analysis

Figure 3: Total CHC Patients, 2007-2009

| | 2007 | 2008 | 2009 | Percent Change |
|----------------|-------|-------|-------|----------------|
| Total Patients | 31135 | 33417 | 34082 | 9.46% |

*Source: Uniform Data Systems

Delaware's community health centers continue to see more patients annually, growing over nine percent in the three year period (see Figure 3). The biggest jump occurred between 2007 and 2008, where CHCs added over 2200 patients.

Figure 4: Poverty Status for Delaware CHC Patients, 2007-2009

| | 100% and Below | 101-150% | 151-200% | Over 200% | Unknown | Total |
|----------------|----------------|----------|----------|-----------|---------|--------|
| 2007 | 14,487 | 5,634 | 2,255 | 2,173 | 6,586 | 31,135 |
| 2008 | 16,699 | 6,637 | 2,517 | 1,772 | 5,792 | 33,417 |
| 2009 | 17,568 | 6,321 | 1,951 | 1,188 | 7,054 | 34,082 |
| Percent Change | 21.27% | 12.19% | -13.48% | -45.33% | 7.11% | 9.47% |

*Source: Uniform Data Systems

Delaware saw declines in the number of patients seen in the two higher income cohorts (patients who have incomes between 151 and 200 percent of poverty and those who have incomes over 200 percent, as seen in Figure 4). Concurrently, the two lower cohorts (100 percent of poverty and below and between 101 and 151 percent of poverty), saw increased patient visits. The most



impoverished group saw the greatest increase, of over 21 percent. This demonstrates that it is likely that many of the better-off patients have been hurt by the recession, and are now in poorer cohorts. It will be important, with the upcoming implementation of the Affordable Care Act, that community health centers attract patients with incomes over 150 percent of the poverty level and reverse this trend.

Figure 5: Delaware CHC Patients by Race and Ethnicity, 2007-2009

| | Black | White | Hispanic | Asian |
|----------------|--------------|--------------|-----------------|--------------|
| 2007 | 10,702 | 14,896 | 14,262 | 468 |
| 2008 | 10,379 | 7,784 | 14,636 | 470 |
| 2009 | 11,182 | 7,062 | 13,995 | 439 |
| Percent Change | 4.49% | -52.59% | -1.87% | -6.20% |

*Source: Uniform Data Systems

The racial/ethnic breakdown of Delaware's CHC patients showed little change between 2007 and 2009 (see Figure 5). The number on white patients is the exception to this, as their population declined by over 50 percent. We believe that this is more likely an issue with reporting/counting, as the drop is too sudden to be explained by any demographic phenomenon. For the other three predominate racial and ethnic groups, there were fewer changes. The number of black patients seen increased by nearly 4.5 percent, the number of Asian patients in Delaware's CHCs decreased by 6.2 percent, and the number of Hispanic/Latino residents fell by nearly two percent. The decline in Hispanic/Latino patients is surprising as they are the fastest growing group in the state. This decline shows us that Delaware health centers have to adjust outreach strategies to attract more Hispanic/Latino patients.

Racial/Ethnic Analysis

Figure 6: Percent White by County, 2005-2009

| County | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|---------------|-------------|-------------|-------------|-----------------------|-----------------------|
| Kent | 73.38% | 70.99% | 71.30% | -2.07 | -2.83% |
| New Castle | 70.86% | 70.40% | 69.27% | -1.59 | -2.25% |
| Sussex | 81.60% | 78.88% | 79.73% | -1.86 | -2.29% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

Each of the three counties had comparable declines in the percentage of residents that are white. Each county saw a greater than two percent reduction (see Figure 6). Kent County saw the largest change, as the percentage of residents that are white declined by nearly three percent.



Figure 7: Percent Black by County, 2005-2009

| County | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|------------|-------|-------|-------|----------------|----------------|
| Kent | 19.86 | 22.16 | 22.80 | 2.94 | 14.80 |
| New Castle | 22.31 | 22.29 | 23.36 | 1.05 | 4.70 |
| Sussex | 12.97 | 13.12 | 11.89 | -1.09 | -8.38 |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

In Kent and New Castle Counties, the percentage of black residents increased between 2005 and 2009 (see Figure 7). Kent County showed the largest increase, with its percentage of black residents growing by nearly 15 percent. Meanwhile, Sussex, which has the state’s smallest black population, saw that population decline by over 8 percent in this period.

Figure 8: Percent Asian by County, 2005-2009

| County | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|------------|------|------|------|----------------|----------------|
| Kent | 1.53 | 2.80 | 2.03 | 0.50 | 32.56 |
| New Castle | 3.52 | 3.66 | 4.14 | 0.62 | 17.60 |
| Sussex | 0.80 | 0.96 | 0.94 | 0.15 | 18.42 |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

While the percentage of each county’s Asian population rose by at least 17 percent, there was little percentage point growth in the Asian population during this period (see Figure 8). New Castle County grew by the largest amount, from 3.52 percent to 4.14 percent.

Figure 9: Percent Hispanic by County, 2005-2009

| County | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|------------|---------|---------|---------|----------------|----------------|
| Kent | 3.52 % | 4.19% | 4.64% | 1.12 | 32.01% |
| New Castle | 6.55 % | 7.16% | 7.97% | 1.42 | 21.69% |
| Sussex | No data | No data | No data | No data | No data |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

While data was unavailable for Sussex County, Delaware is seeing similar trends in Hispanic population growth to the nation as a whole. Both Kent and New Castle Counties saw increases in their percentage of Hispanic residents (see Figure 9). New Castle, while growing at a slower rate than Kent, saw the largest nominal increase, as the percentage of residents who are Hispanic grew from 6.55 to nearly 8 percent. Kent County’s percentage of residents who are Hispanic grew from 3.52 to 4.64 percent. As noted above, there is no Hispanic/Latino data available for



Sussex County. However, since we can see that both white and black residents are declining in their percentage of the population and there is little change in the Asian population percentages, it is fair to surmise that Hispanic/Latinos are growing in Sussex County as well.

PUMA Analysis

Figure 10: Percent White by New Castle County PUMA

| PUMA Area | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|------------------|-------------|-------------|-------------|-----------------------|-----------------------|
| 00101 | 58.68% | 54.85% | 55.86% | -2.82 | -4.8% |
| 00102 | 86.96% | 87.69% | 88.11% | 1.15 | 1.31% |
| 00103 | 66.48% | 69.93% | 63.71% | -2.77 | -4.16% |
| 00104 | 73.08% | 72.33% | 71.04% | -2.04 | -2.78% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

Only one PUMA level, the area northwest of Wilmington, saw an increase in the percentage of white residents in New Castle County (see Figure 10). The other three PUMA districts saw decreases of between 2.7 and 2.8 percent over the five year period. The northwest quadrant of the county is also the most white area of the county, and is bucking the diversity trends of the state.



Map 2: Change in Percentage of White Residents in New Castle County PUMAs

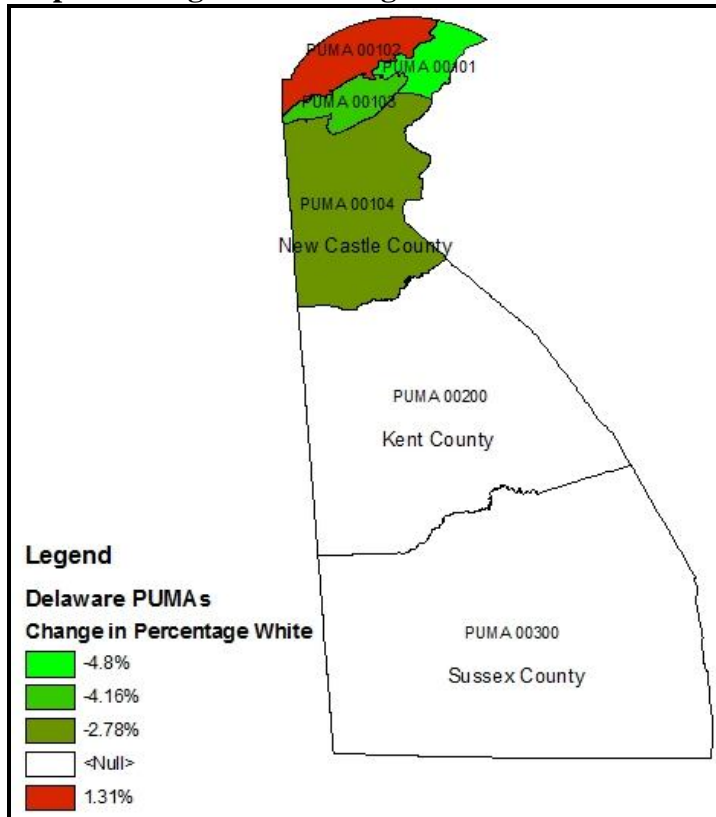


Figure 11: Percent Black by PUMA

| PUMA Area | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|-----------|--------|--------|--------|----------------|----------------|
| 00101 | 36.68% | 39.36% | 39.28% | 2.60 | 7.07% |
| 00102 | 6.83% | 4.54% | 3.88% | -2.96 | -43.29% |
| 00103 | 23.73% | 20.70% | 26.69% | 2.97 | 12.5% |
| 00104 | 19.90% | 20.95% | 21.37% | 1.48 | 7.41% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

New Castle County’s black population trends are a mirrored image of those seen in the white population. With the exception of the area northwest of Wilmington, each PUMA district saw an increase in the percentage of black residents (see Figure 11). In the area northwest of Wilmington, black residents became an even smaller minority, falling from 6.83 percent of the population to 3.88 percent of the population.

Figure 12: Percent Asian by PUMA

| PUMA Area | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|-----------|-------|-------|-------|----------------|----------------|
| 00101 | 1.20% | 2.24% | 1.27% | 0.06% | 5.35% |
| 00102 | 4.73% | 5.58% | 6.13% | 1.40% | 29.62% |
| 00103 | 5.09% | 3.40% | 5.46% | 0.37% | 7.34% |
| 00104 | 4.08% | 3.72% | 4.28% | 0.20% | 4.97% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

The Asian population displayed increases in each of New Castle County’s PUMA districts, with the largest increase happening in the area northwest of Wilmington (see Figure 12). While this area is predominately white and becoming whiter, the Asian community showed strong growth, growing from 4.73 percent of the population to 6.13 percent. The other regions saw growth, albeit smaller and less significant.

Unfortunately, local data is unavailable for assessing the changes in the Hispanic/Latino population.

Poverty Analysis

Figure 13: Delaware Poverty Rates, 2005-2009

| County | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|------------|--------|--------|--------|----------------|----------------|
| Kent | 10.69% | 12.65% | 12.69% | 2.00 | 18.67% |
| New Castle | 10.14% | 10.33% | 9.34% | -0.79 | -7.81% |
| Sussex | 10.95% | 9.19% | 10.45% | -0.51 | -4.63% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

Two counties, New Castle and Sussex, saw moderate decreases in their overall poverty rates between 2005 and 2009 (see Figure 13). Kent County, however, saw a significant increase of 2 percentage points. This is worrying as the county also saw little income growth in this period.



Figure 14: Poverty Rates by PUMA

| PUMA Area | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|-----------|--------|--------|--------|----------------|----------------|
| 00101 | 16.55% | 16.94% | 15.19% | -1.36 | -10.32% |
| 00102 | 5.61% | 6.04% | 6.39% | 0.78 | 5.83% |
| 00103 | 14.58% | 12.93% | 10.52% | -4.06 | -18.66% |
| 00104 | 3.61% | 5.07% | 6.20% | 2.59 | 22.39% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

While two areas, inner-city Wilmington and the areas southwest of Wilmington, saw declines in their poverty rates, both area's rates remain high (see Figure 14). Inner-city Wilmington's rate of 15 percent is the region's highest. The area southwest of Wilmington saw a very significant drop in poverty in this period, but its rate is still over 10 percent. The more wealthy area northwest of Wilmington saw a small increase in poverty, while the large southern region of the county saw a more dramatic increase, rising from 3.61 percent to 6.2 percent.

Home Value Analysis

Figure 15: Delaware Median Home Values by County 2005-2009

| County | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|------------|---------|---------|---------|----------------|----------------|
| Kent | 159,900 | 205,700 | 202,900 | 43,000 | 26.89 |
| New Castle | 218,400 | 252,200 | 260,900 | 42,500 | 19.46 |
| Sussex | 203,400 | 232,200 | 255,700 | 52,300 | 25.71 |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

The period between 2005 and 2009 saw relatively comparable housing value increases in all three counties (see Figure 15). New Castle and Sussex County saw their home values converge. In this period, Sussex County saw more sustained growth while New Castle's growth sagged some between 2007 and 2009. Kent County, the county with the lowest median home values, saw a great increase between 2005 and 2007 and a slight decrease between 2007 and 2009 during the housing downturn.



Figure 16: Delaware Median Home Value by PUMA, 2005-2009

| PUMA Area | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|-----------|-----------|-----------|-----------|----------------|----------------|
| 00101 | \$178,700 | \$219,200 | \$216,400 | \$37,700 | 21.10 |
| 00102 | \$300,200 | \$344,100 | \$332,500 | \$32,300 | 10.76 |
| 00103 | \$173,300 | \$202,100 | \$212,600 | \$39,300 | 22.68 |
| 00104 | \$247,000 | \$308,400 | \$276,800 | \$29,800 | 12.06 |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

Most areas in New Castle County saw decreases in home values during the housing crisis between 2007 and 2009. While all saw overall increases in the period between 2005 and 2009, the area southwest of the Wilmington saw its home values grow in this period and grew the most overall (see Figure 16). This area still has the lowest home values of the county, they have gained some ground on neighboring areas. The central city of Wilmington featured similar growth patterns despite seeing a decline in home values between 2007 and 2009. The wealthiest area (northwest of Wilmington) saw its home values increase by the smallest percentage and took a large hit between 2007 and 2009. The county's southern region had similar results in the period, having grown at a slightly higher rate.

Income Analysis

Figure 17: Delaware Median Family Income by County, 2005-2009

| County | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|------------|----------|----------|----------|----------------|----------------|
| Kent | \$48,282 | \$46,788 | \$51,485 | \$3,203 | 6.63% |
| New Castle | \$59,270 | \$59,600 | \$62,293 | \$3,023 | 5.10% |
| Sussex | \$44,942 | \$50,976 | \$50,729 | \$5,787 | 12.88% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

Delaware saw little income growth between 2005 and 2009, and only Sussex County grew beyond the 9 percent rate of inflation (see Figure 17). While Sussex County's incomes rose in this period, it is still the least affluent of the three counties. This data shows that Delaware, especially in the two counties – Kent and New Castle – with urban centers, did not keep up with the nation economically and stagnated during the period.



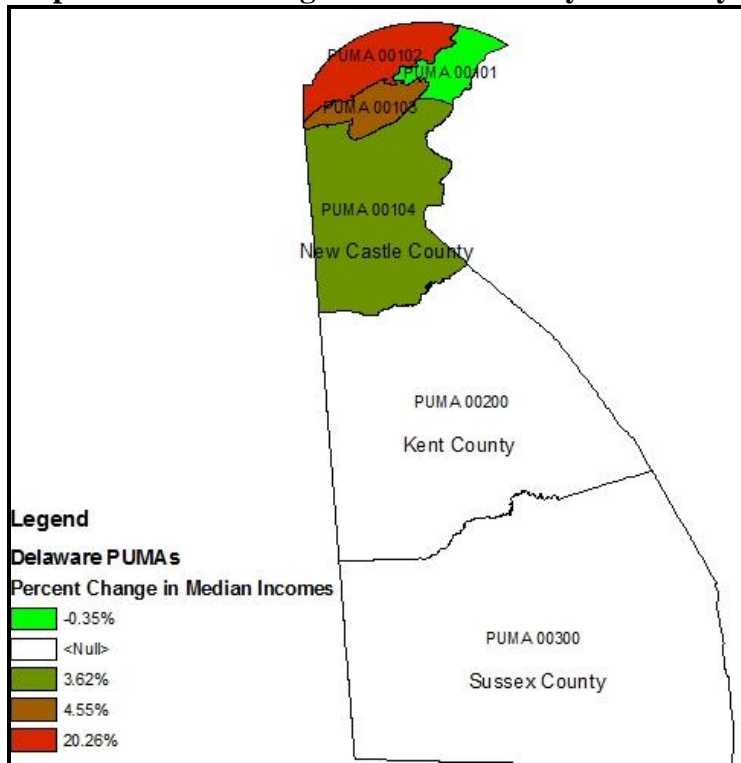
Figure 18: Median Family Income by New Castle PUMAs, 2005-2009

| PUMA Area | 2005 | 2007 | 2009 | Nominal Change | Percent Change |
|-----------|-------------|-------------|-------------|----------------|----------------|
| 00101 | \$45,878.00 | \$46,425.00 | \$45,714.00 | -\$164.00 | -0.36% |
| 00102 | \$71,929.00 | \$80,492.00 | \$86,509.00 | \$14,580.00 | 20.27% |
| 00103 | \$53,065.00 | \$49,419.00 | \$55,484.00 | \$2,419.00 | 4.56% |
| 00104 | \$70,498.00 | \$80,107.00 | \$73,051.00 | \$2,553.00 | 3.62% |

*Source: American Community Survey, One-Year Projections, 2005, 2007, 2009

A close look at New Castle County shows the wealthiest area (PUMA 00102, northwest of the Wilmington) also performed the best in income growth (see Figure 18). This area was the only area to keep up with the 9 percent inflation rate. The lowest-income area, the urban center of Wilmington, performed the poorest and saw its incomes fall slightly. Concurrently, the central and southern areas of the county saw their incomes grow slightly, but did not nearly keep up with inflation. The gap between wealthy and less affluent areas of the county grew significantly in the period.

Map 3: Percent Change in Median Family Income by New Castle PUMAs, 2005-2009



Limitations

In this report, we used the best available data. However, for only one county (New Castle) was quality data available at below the county level. With the eventual release of all decennial census data throughout 2011, we will be able to do a more uniform analysis of the state's situation. Additionally, data for Hispanic/Latino populations in Sussex County is unavailable in the American Community Survey dataset used for this analysis. With the release of all 2010 decennial census data, we will again be able to make more informed conclusions regarding the status of the Latino population in Sussex County.

Conclusion

In conclusion, Delaware CHCs will have to take these demographic trends into account when conducting operations and strategic planning. The major trends occurring in Delaware are as follows:

- The state is becoming increasingly diverse.
- New Castle County is becoming more diverse in three out of four PUMA districts, mirroring the state overall.
- The state's median incomes are not on pace with inflation.
- In New Castle County, incomes are growing the greatest in the already better-off areas, and stagnating in other areas leading to widespread stratification.
- Despite being the fastest growing group in the state, Latinos/Hispanics are not visiting CHCs in greater numbers.
- CHC patients in Delaware are becoming less economically diverse, as fewer patients over 150 percent of the poverty line are being seen at centers.

The above changes will have many impacts on CHCs in Delaware. Some of the implications include:

- An Increasing need for greater outreach and language services for Latino/Hispanic populations had developed in the state.
- With the upcoming PPACA implementation, CHCs should monitor the situation of residents who will likely still be uninsured in 2014.
- Stagnating incomes provide opportunities to bring new patients in through Medicaid enrollment.
- With increasing high unemployment and stagnating incomes, Delaware CHCs need to attract nontraditional patients who are above the poverty line but still in high need of services.
- Income stratification illustrates that many communities are showing increases in relative need. CHCs need to identify these areas and provide services for their residents.

Mid Atlantic Association of Community Health Centers
Delaware Demographic Assessment

Thus, CHCs must examine how these changes will impact how they function and plan to address future challenges. Delaware CHCs face many challenges in the future brought on both by demographic changes and public policies. To remain prosperous, it is vital that CHCs examine how to adjust to these changes to increase their share of the health care market.

