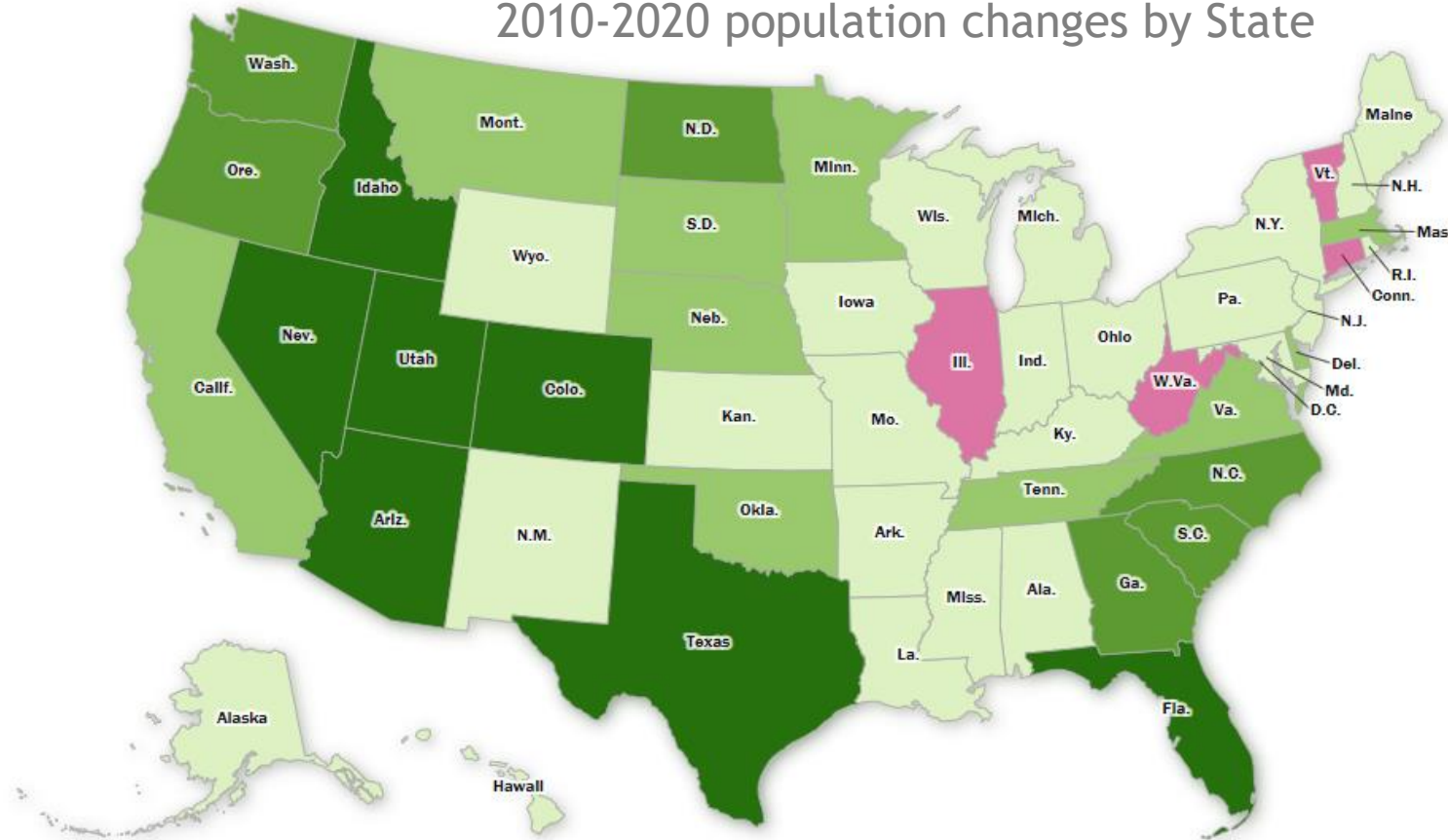


Demographics Update

■ Negative growth ■ 0-5% ■ 5-10% ■ 10-15% ■ 15% and above

2010-2020 population changes by State




March 2021

New projections Releases:

Delaware:

DE Population Consortium (November 2020)

- State, County projections to 2050
- All Municipalities
- Seasonal Projections



First year after SB 7 signed into law. Formally created the Delaware Population Consortium, identifies its membership and work products.

Maryland:

MD State Data Center (December 2020)

- Projections out to 2045
- Households and Population only
- Latest Employment data release from 2015

New projections Releases:

Delaware:

DE Population Consortium (November 2020)

- State, County projections to 2050
- All Municipalities
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- Projections out to 2045
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- Latest Employment data release from 2015

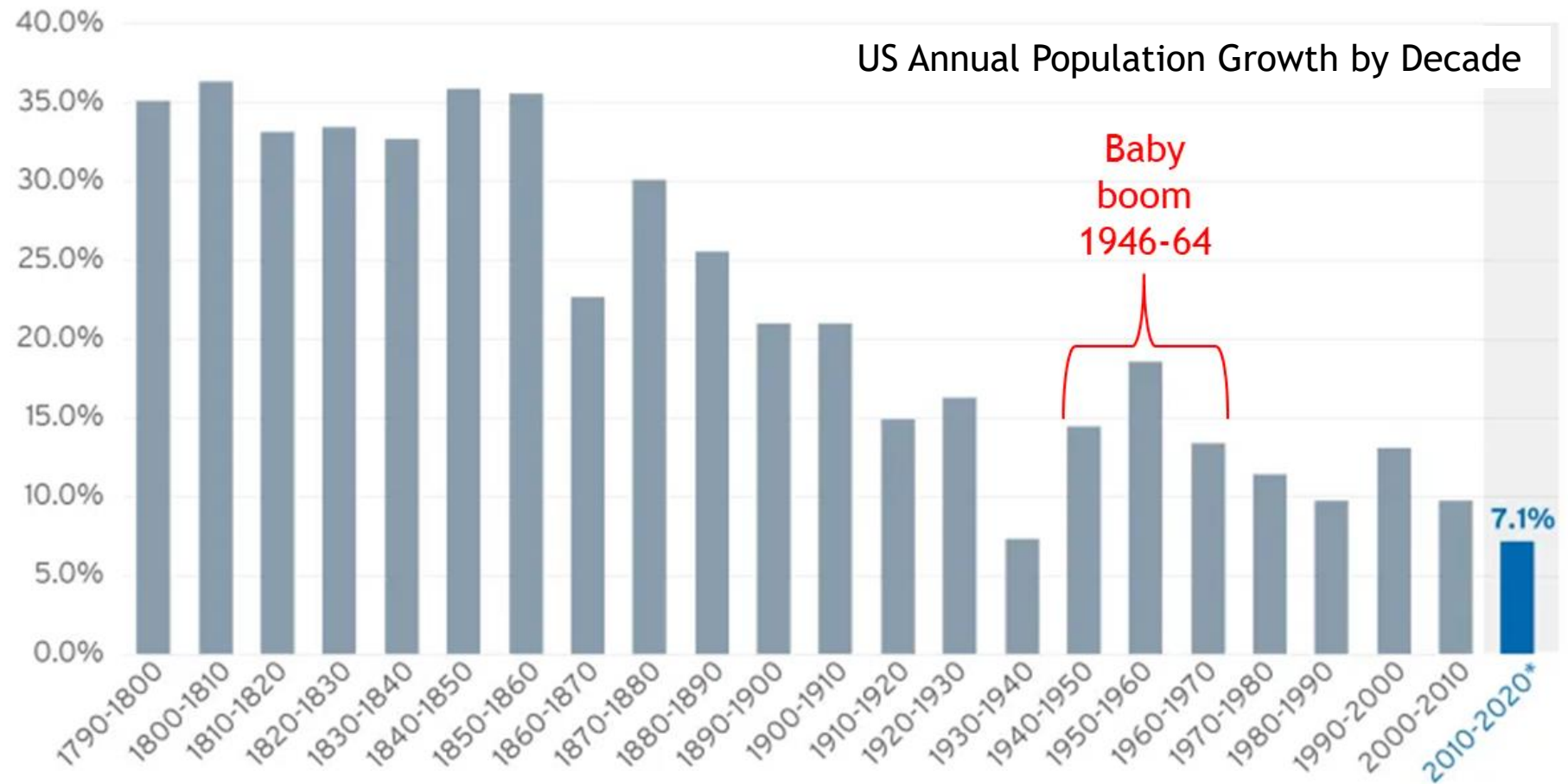
2020 Census:

- 1/19/2021: Release of 2020 Census Geography P.L. 94-171 files
- Sept. 2021: Block-level data due to all States for redistricting

National Picture:

- U.S. is GROWING, but SLOWING
- Population continues to “gray”
- Deaths catching up to Births
- Immigration becoming larger part of growth, but uneven

Four states had more deaths than births in 2019:
West Virginia (-4,679),
Maine (-2,262),
New Hampshire (-121)
Vermont (-53).



National Picture:

Important Dates coming in the NEXT decade:

2030 - All “baby boomers” will reach 65 (1 in 5 persons)

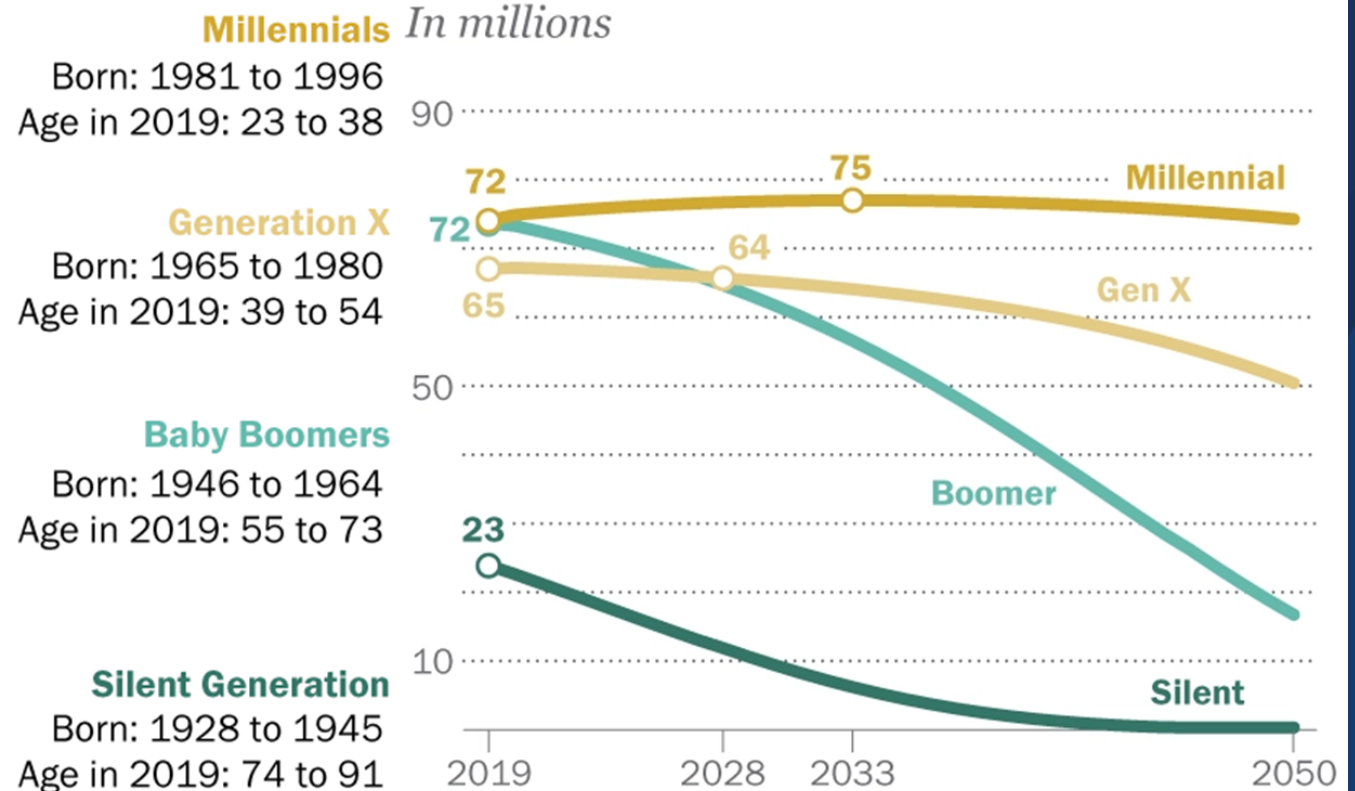
2030 - Net Migration will overtake natural increase as main population driver

2034 - 65+ population will be larger than Under 18 Population for first time ever.

COVID Impact:

- Baby Bust, not a boom (300K fewer births than expected)
- Will extend into 2021, 2022

Projected population by generation

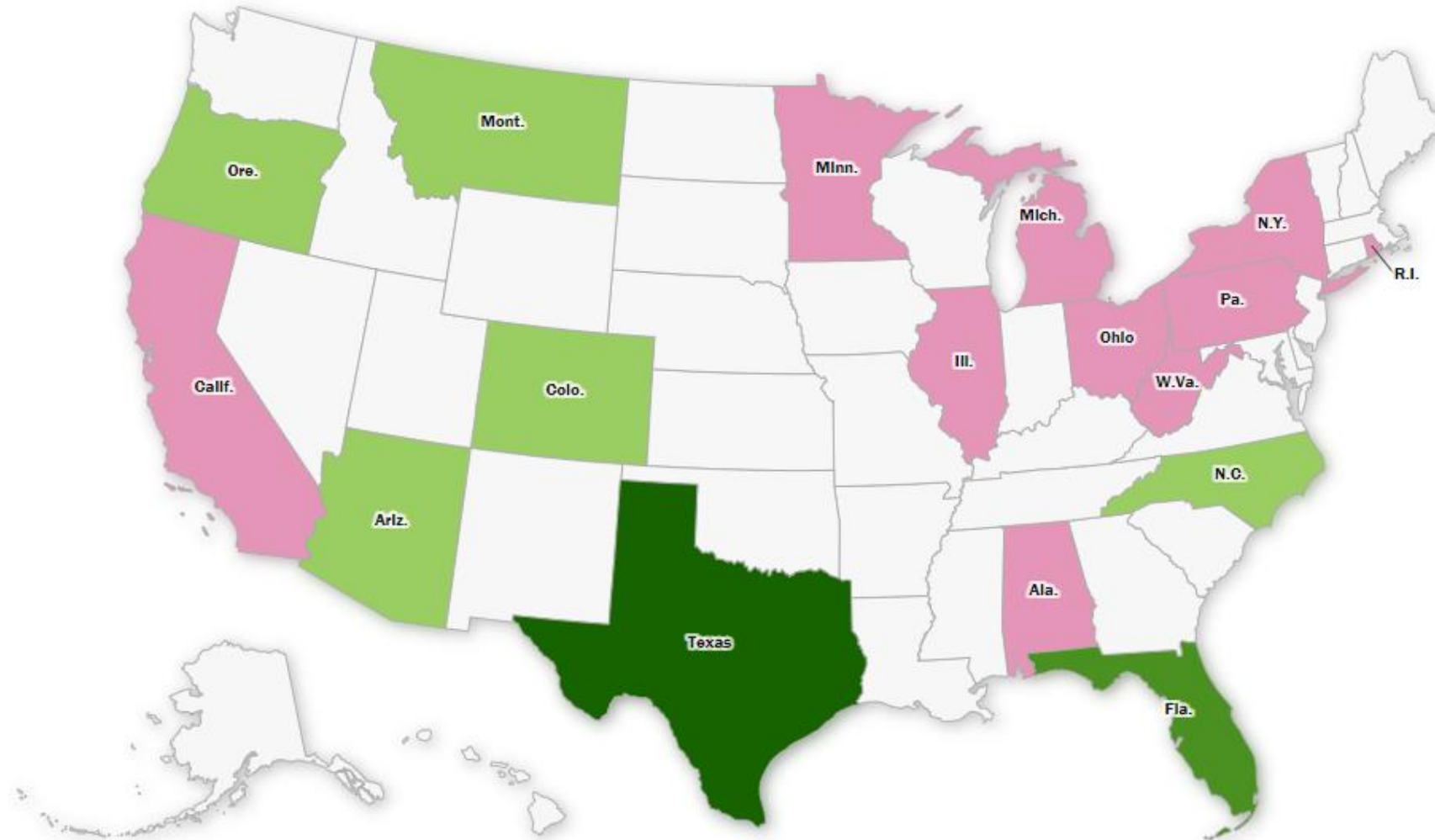


Source: Pew Research Center tabulations of U.S. Census Bureau population estimates released April 2020 and

National Picture:

Projected Change in Congressional Representation, 2010-2020

■ Lose 1 seat ■ No change ■ Gain 1 Seat ■ Gain 2 Seats ■ Gain 3 Seats



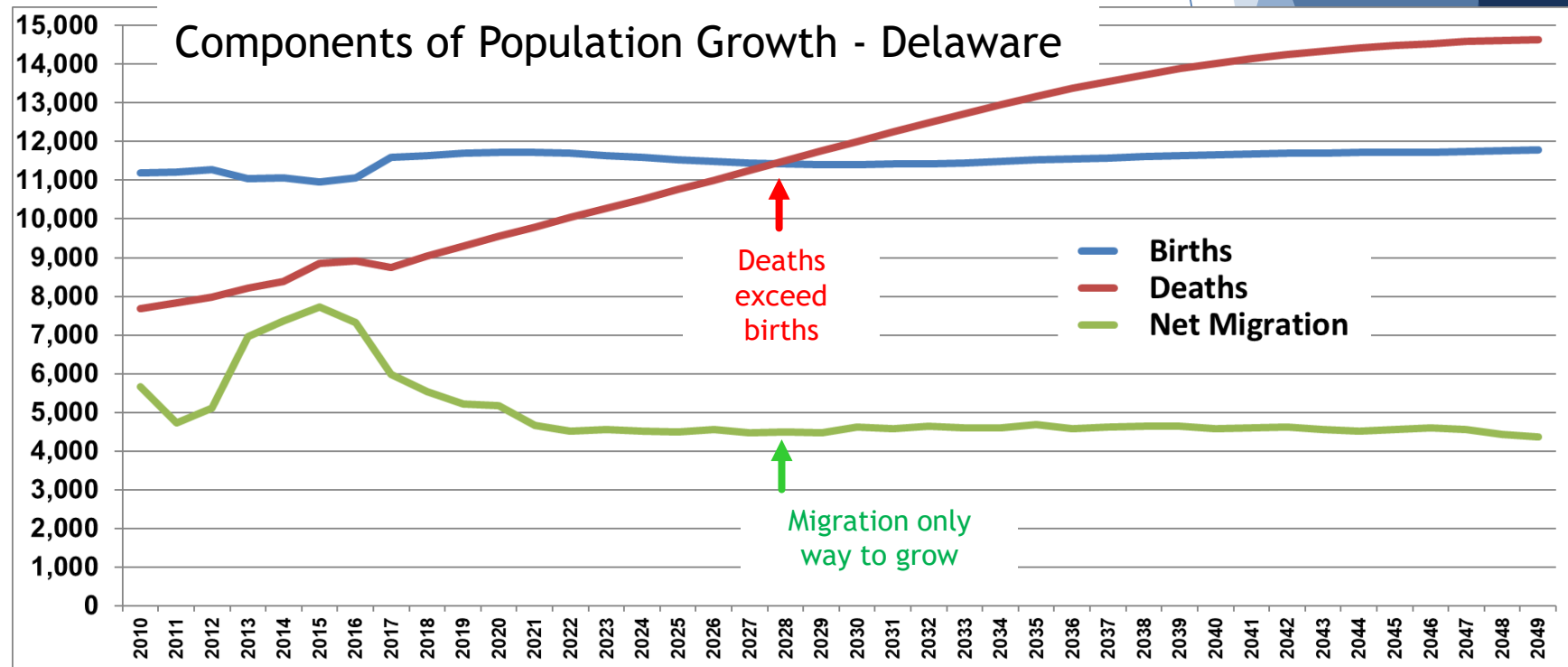
2020 DPC projections:

- Delaware not immune to National trends
- May even be faster than other States
- Nat. Increase breakpoint:
NCC: 2027
Kent: 2031
Sussex: 2013

Total Population - State of Delaware

	Population 2000	Population 2010	Population 2020	Population 2030	Population 2040	Population 2050
TOTAL	786,391	899,600	979,920	1,024,158	1,050,497	1,055,289

Growth by Decade	2000-2010 Change	2010-2020 Change	2020-2030 Change	2030-2040 Change	2040-2050 Change
	113,209	80,320	44,238	26,339	4,792



2020 DPC projections:

Total Population by County

	Population 2000	Population 2010	Population 2020	Population 2030	Population 2040	Population 2050	2020-2050 Change
NCC	501,855	538,753	558,863	566,642	571,198	566,364	7,501
Kent	127,229	162,955	181,673	187,388	189,601	189,562	7,889
Sussex	157,307	197,892	239,384	270,128	289,698	299,363	59,979
TOTAL	786,391	899,600	979,920	1,024,158	1,050,497	1,055,289	75,369



2020 DPC projections:

Total Population by County

	Population 2000	Population 2010	Population 2020	Population 2030	Population 2040	Population 2050	2020-2050 Change
NCC	501,855	538,753	558,863	566,642	571,198	566,364	7,501
Kent	127,229	162,955	181,673	187,388	189,601	189,562	7,889
Sussex	157,307	197,892	239,384	270,128	289,698	299,363	59,979
TOTAL	786,391	899,600	979,920	1,024,158	1,050,497	1,055,289	75,369

Total Employment by County

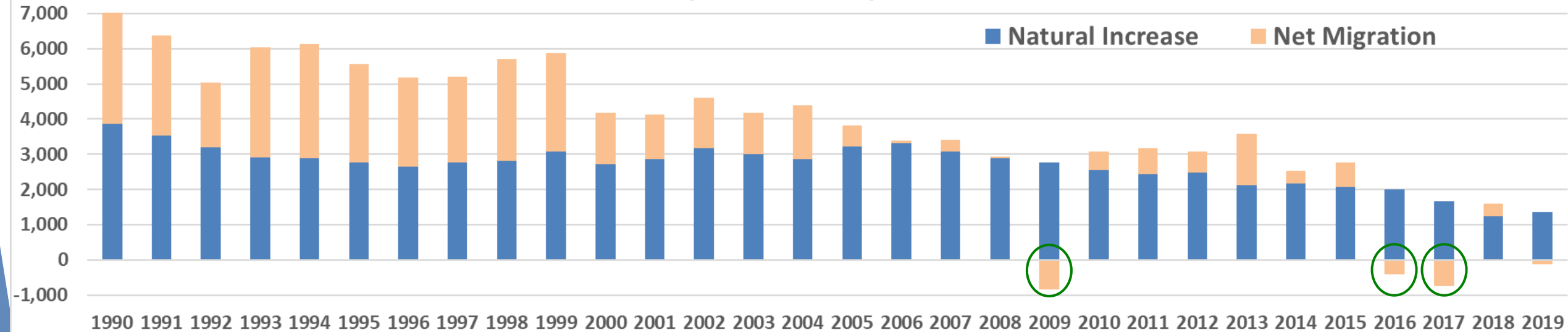
	Employment 2000	Employment 2010	Employment 2020	Employment 2030	Employment 2040	Employment 2050	2020-2050 Change
NCC	289,400	263,947	289,696	283,784	280,873	273,550	-16,146
Kent	53,910	60,704	70,969	72,416	73,380	73,203	2,234
Sussex	62,709	75,368	90,532	97,070	102,581	107,020	16,488
TOTAL	406,019	400,019	451,197	453,270	456,834	453,773	2,576

DPC projections:

New Castle County :

- Natural increase and net migration both falling

New Castle: Components of Population Growth 1990-2019



↑
"Great
Recession"

- Tightly tied to net migration
- Not immune to declines in births
- Migration very inconsistent

2020 DPC projections:

City and Town Population Estimates - New Castle 2020 DPC Projections

NAME	2010	2019	Change 2010-19
Arden village	433	440	7
Ardencroft village	211	216	5
Ardentown village	267	270	3
Bellefonte town	1,193	1,164	-29
Delaware City city	1,776	1,837	61
Elsmere town	6,072	5,872	-200
Middletown town	18,869	22,900	4,031
Newark city	31,467	33,782	2,315
New Castle city	5,106	5,392	286
Newport town	1,072	1,039	-33
Odessa town	362	360	-2
Townsend town	2,053	2,659	606
Wilmington city	70,875	70,161	-714
Total Municipal Population	139,756	146,092	6,336

2020 DPC projections:

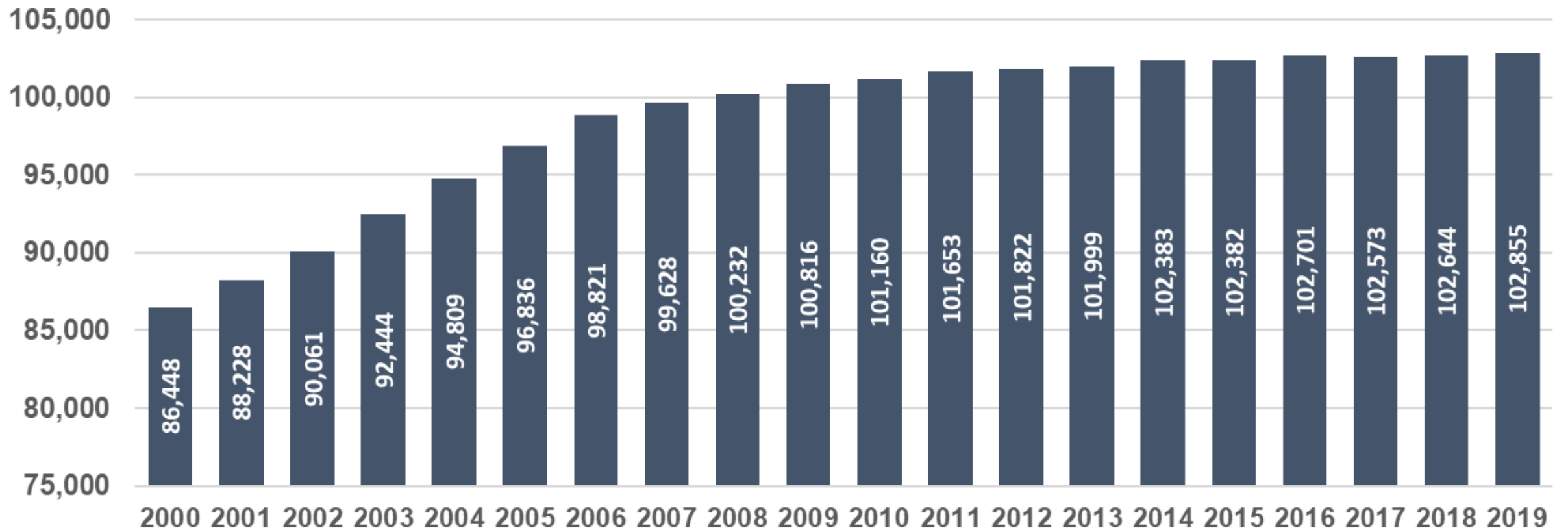
City and Town Population Estimates - New Castle 2020 DPC Projections								
NAME	2010	2019	Change 2010-19	2020 DPC	2030 DPC	2040 DPC	2050 DPC	2020 - 2050 Changes
Arden village	433	440	7	440	444	447	446	6
Ardencroft village	211	216	5	216	219	220	220	4
Ardentown village	267	270	3	270	272	273	272	2
Bellefonte town	1,193	1,164	-29	1,162	1,159	1,153	1,137	-25
Delaware City city	1,776	1,837	61	1,840	1,867	1,889	1,895	55
Elsmere town	6,072	5,872	-200	5,858	5,819	5,765	5,666	-192
Middletown town	18,869	22,900	4,031	23,166	24,849	26,667	28,521	5,355
Newark city	31,467	33,782	2,315	34,035	36,589	38,908	41,114	7,079
New Castle city	5,106	5,392	286	5,408	5,534	5,647	5,719	310
Newport town	1,072	1,039	-33	1,037	1,030	1,021	1,004	-32
Odessa town	362	360	-2	359	358	356	351	-8
Townsend town	2,053	2,659	606	2,693	2,993	3,343	3,741	1,048
Wilmington city	70,875	70,161	-714	70,325	70,702	70,368	69,501	-824
Total Municipal Population	139,756	146,092	6,336	146,811	151,835	156,058	159,589	12,778

2020 MDP projections:

Cecil:

- Growth in early 2000's, then very flat

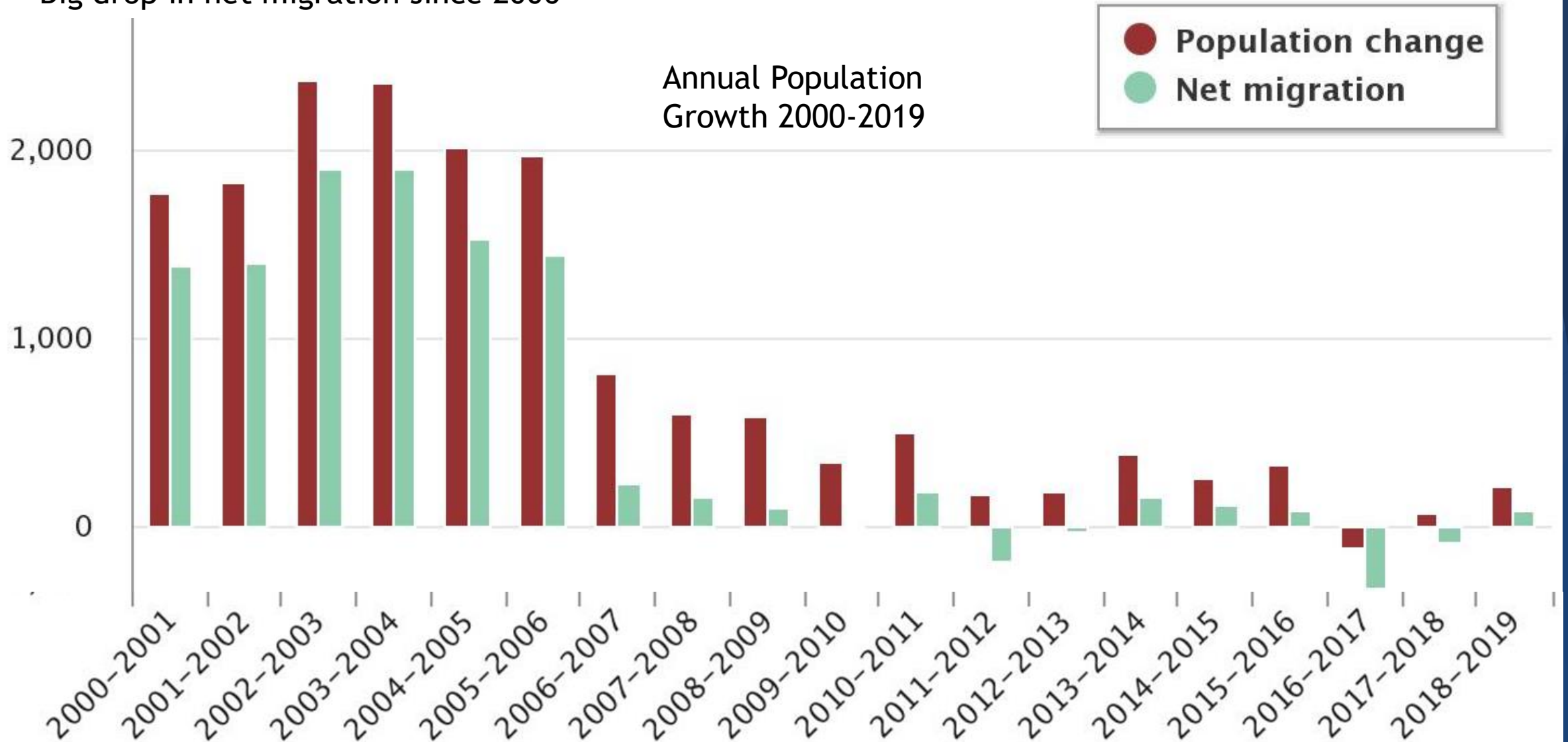
Cecil Countywide Population 2000-2019



2020 MDP projections:

Cecil:

- Growth in early 2000's, then very flat
- Big drop in net migration since 2006



2020 MDP projections:

Cecil Countywide Population & Employment: 2020-2045

	2000	2010	2020	2030	2040	2045	2020-2045 Change
Cecil County Population	85,951	101,108	103,100	112,050	125,450	131,550	28,450
Cecil County Employment*	32,043	38,499	44,000	52,200	56,100	58,400	14,400

* Based on 2015 projection series

- Steady “slide”
in forecast

MDP Series	Est. 2040 Population
2009 Series	155,000 by 2030
2012 Series	155,000
2014 Series	139,000
2017 Series	132,000
2020 Series	125,000

Phasing of BRAC-related population:

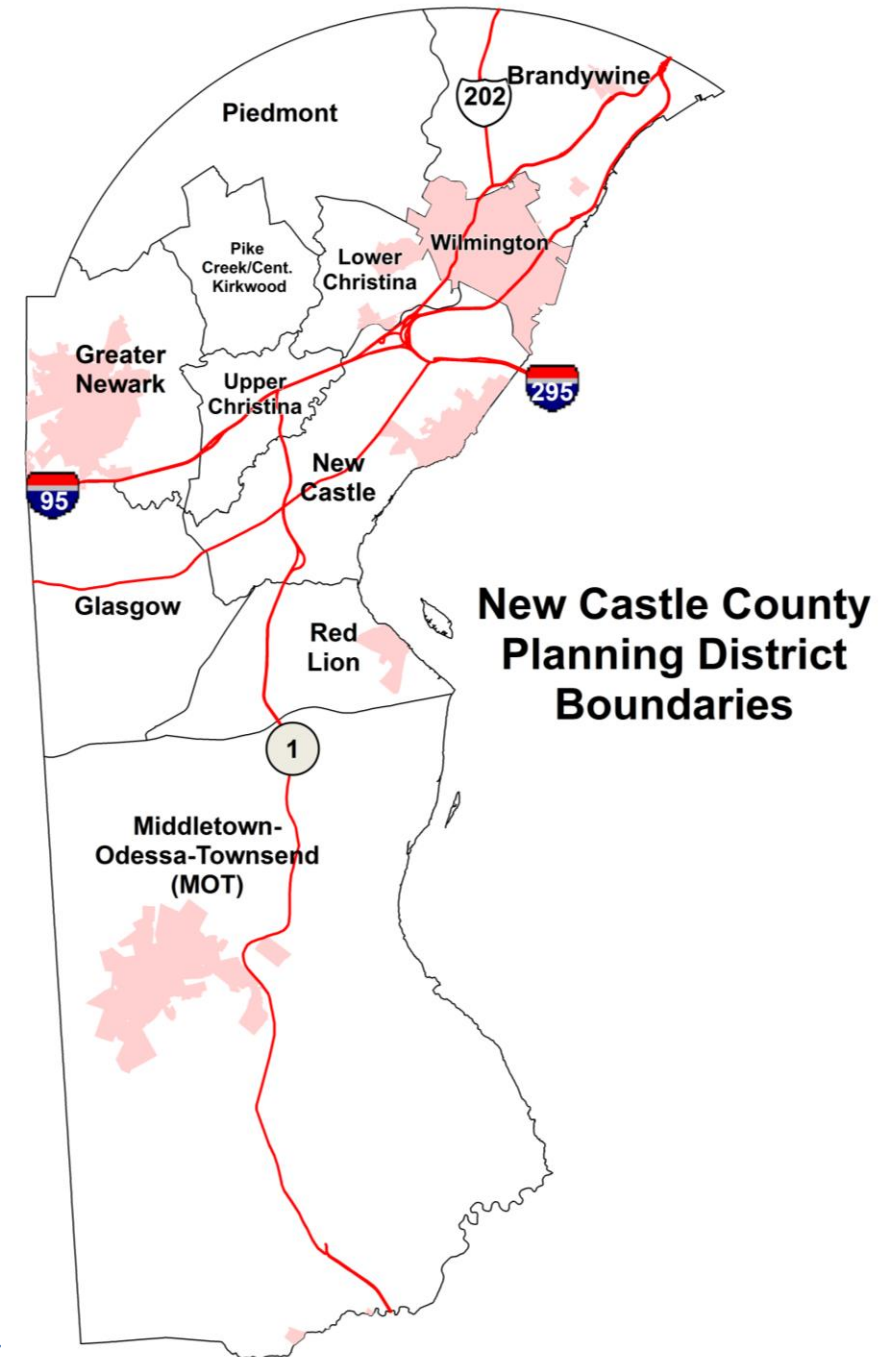
Scenario	Population		
	2007	2012	2017
Baseline	102,000	114,000	126,800
Mid-case	102,228	118,432	132,157
Low case	102,187	117,633	131,190
High case	102,262	119,101	132,965

Local Picture:

NCC Planning Districts

Several Internal Changes Happening Impacting Housing/Population:

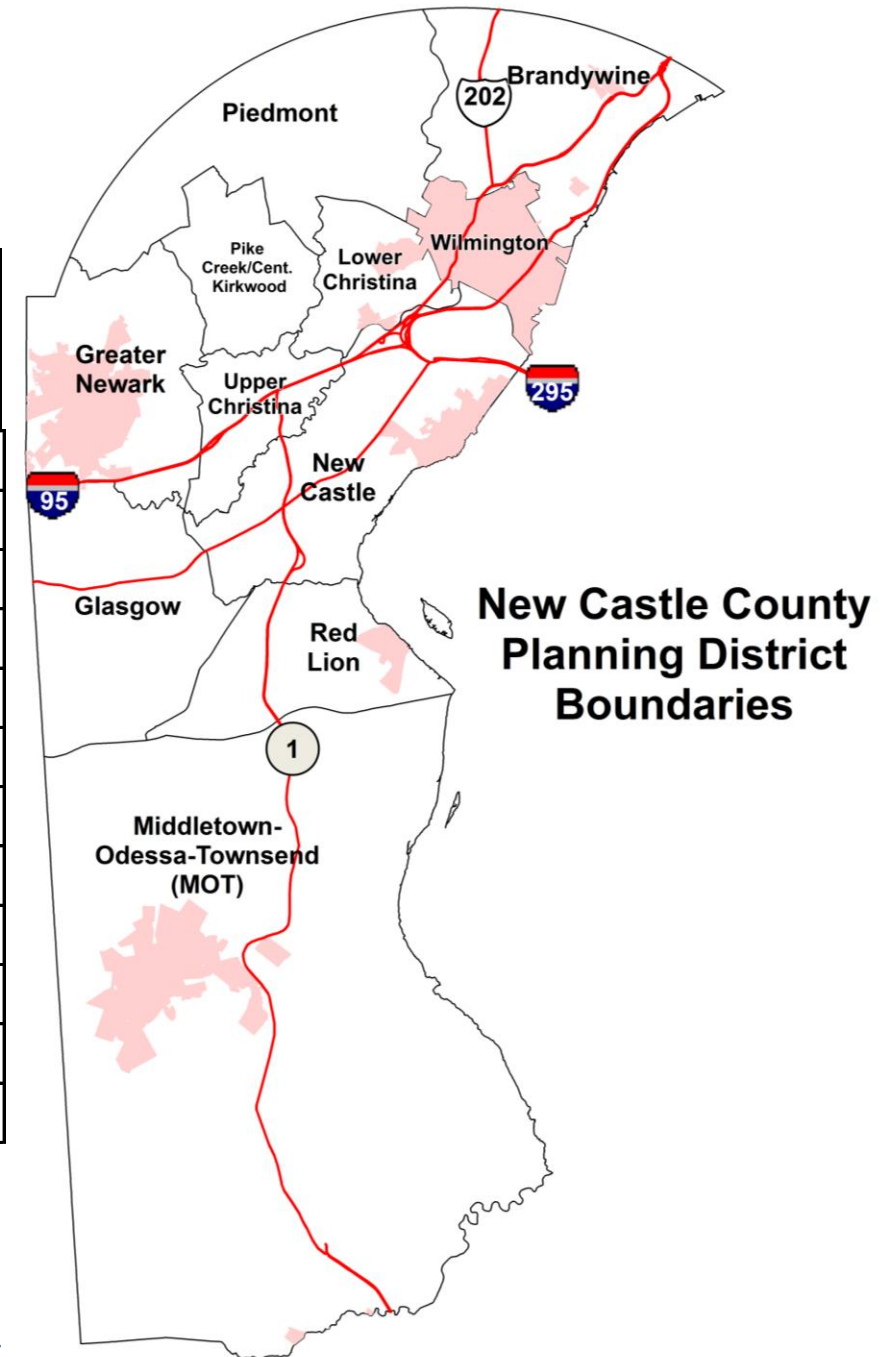
- ▶ Household types changing in parts of the County
 - Renter vs. Owner
- ▶ Growth in the “non-family household” and single person households
- ▶ Aging population and other choices continue to shape household types, creating a potential “bubble”
- ▶ Changes in type of vacancies



Local Picture:

Occupied Households by Planning District

New Castle County	Census HH 2000	Census HH 2010	Census HHs ACS 2017	Household Changes 2000-2017
Brandywine	32,292	32,131	31,790	-502
Glasgow	11,316	14,375	14,566	3,250
Greater Newark	23,151	24,080	24,354	1,203
L. Christiana	14,496	14,367	13,792	-704
MOT	9,549	16,516	19,901	10,352
New Castle	30,309	31,537	31,918	1,609
Piedmont	10,654	10,959	11,159	505
Pike Creek	17,173	17,084	16,443	-730
Red Lion	1,906	2,943	3,173	1,267
U.Christiana	9,472	10,076	9,927	455
Wilmington	28,617	28,615	28,806	189
Totals	188,935	202,682	205,829	16,894

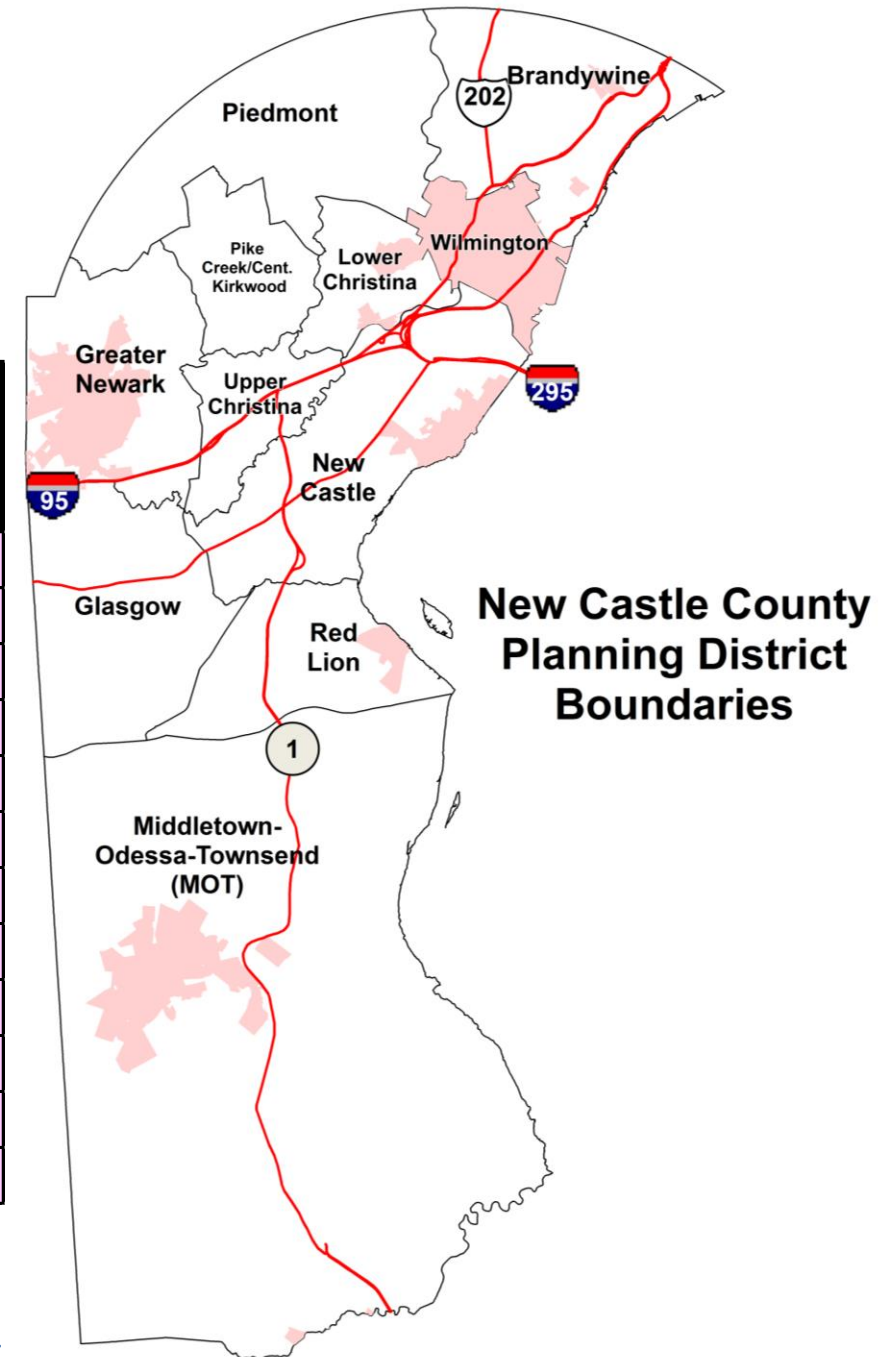


NOTE: 2017 is based on ACS 2015-19

Local Picture:

Occupied Household Changes by Planning District

New Castle County	HH Change 1970-80	HH Change 1980-90	HH Change 1990-2000	HH Change 2000-2010	HH Change 2010-17
Brandywine	3,897	1,061	955	-161	-341
Glasgow	2,297	3,241	5,176	3,059	191
Greater Newark	4,199	2,911	2,936	929	274
L. Christiana	-87	50	192	-129	-575
MOT	846	2,065	3,668	6,967	3,385
New Castle	4,674	5,758	5,752	1,228	381
Piedmont	1,408	2,705	2,341	305	200
Pike Creek	2,444	3,927	1,991	-89	-641
Red Lion	134	179	590	1,037	230
U.Christiana	2,601	2,567	1,631	604	-149
Wilmington	-1,473	2,352	173	-2	191
	20,940	26,816	25,405	13,747	3,147

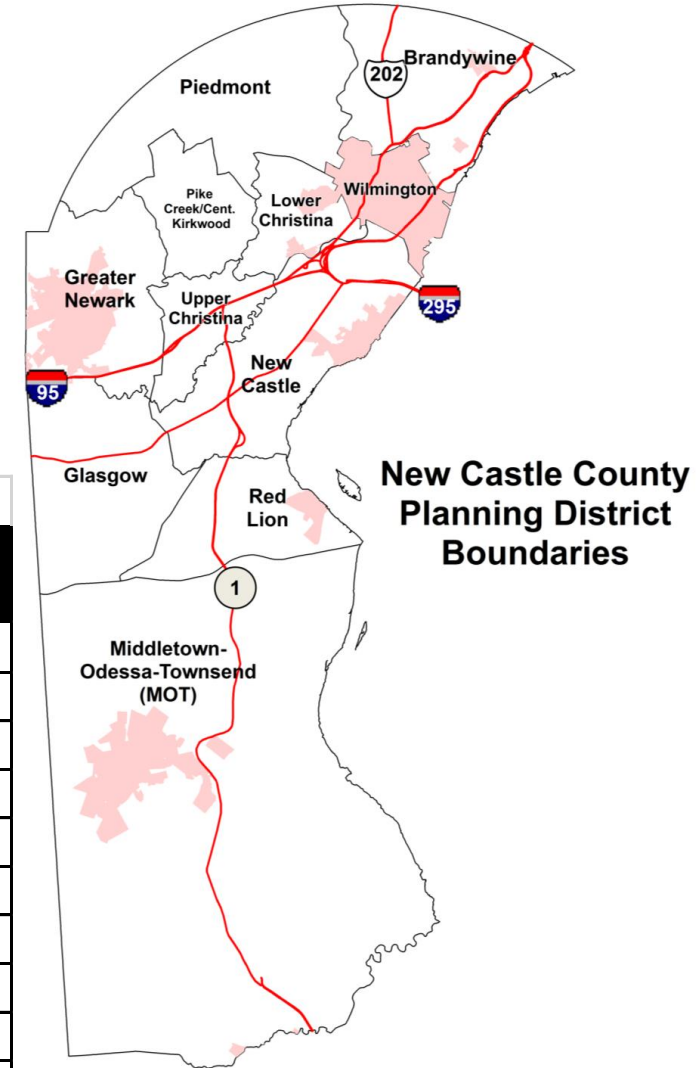


NOTE: 2017 is based on ACS 2015-19

Local Picture:

Under 18 Population			
District	2000 Census	ACS 2017	Change 2000-2017
Brandywine	18,074	18,037	-37
Glasgow	9,517	9,465	-52
Greater Newark	13,230	11,172	-2,058
L. Christiana	8,840	8,091	-749
MOT	8,390	15,314	6,924
New Castle	22,634	20,082	-2,552
Piedmont	7,598	5,766	-1,832
Pike Creek	9,656	8,701	-955
Red Lion	1,571	2,232	661
U.Christiana	6,282	5,755	-527
Wilmington	18,687	16,034	-2,653
TOTAL	124,479	120,649	-3,830

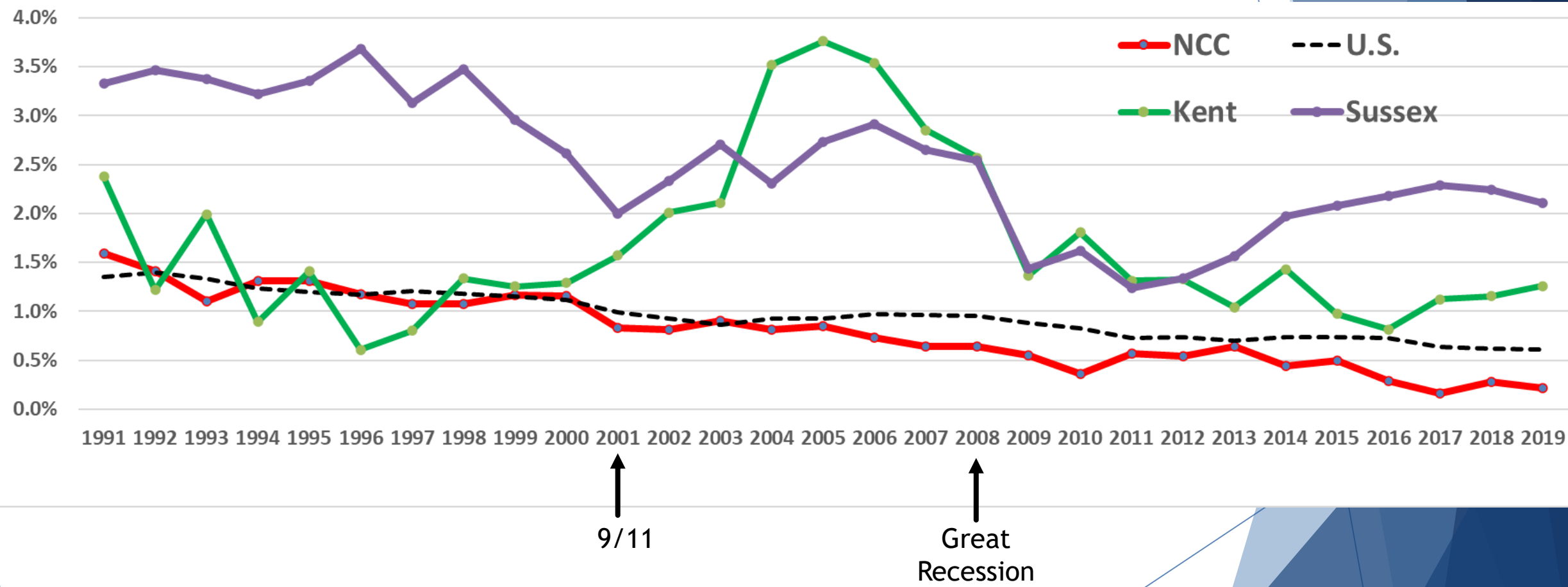
65+ Population			
New Castle County	2000 Census	ACS 2017	Change 2000-2017
Brandywine	13,554	15,868	2,314
Glasgow	1,398	4,730	3,332
Greater Newark	6,217	9,968	3,751
L. Christiana	5,832	5,106	-726
MOT	2,076	9,043	6,967
New Castle	7,246	11,195	3,949
Piedmont	4,390	7,624	3,234
Pike Creek	6,135	7,120	985
Red Lion	439	1,354	915
U.Christiana	1,500	3,118	1,618
Wilmington	9,177	9,142	-35
TOTAL	57,964	84,268	26,304



Questions?

Local Picture:

% Annual Population Growth 1990-2019



While total household growing, Household sizes shrinking

► Changes in Renter vs. Owner Housing

Between 2000 and 2017:

- NCC added a net of 7,233 OWNER-occupied HHs. Avg. HH size 2.73
- NCC added a net of 9,661 RENTER-occupied HHs. Avg. HH Size 2.41

New Castle County	Owner Occupied HH 2000	Owner Occupied HH ACS 2015-19	2000 - 2017 Change
Brandywine	23,712	23,015	-697
Glasgow	9,245	11,072	1,827
Greater Newark	14,525	14,647	122
L. Christiana	10,407	9,536	-871
MOT	8,478	17,664	9,186
New Castle	21,292	20,869	-423
Piedmont	9,236	9,397	161
Pike Creek	13,794	12,328	-1,466
Red Lion	1,723	2,942	1,219
U.Christiana	5,770	5,789	19
Wilmington	14,332	12,488	-1,844
Totals	132,514	139,747	7,233

New Castle County	Renter Occupied HH 2000	Renter Occupied HH ACS 2015-19	2000 - 2017 Change
Brandywine	8,580	8,775	195
Glasgow	2,071	3,494	1,423
Greater Newark	8,626	9,707	1,081
L. Christiana	4,089	4,256	167
MOT	1,071	2,237	1,166
New Castle	9,017	11,049	2,032
Piedmont	1,418	1,762	344
Pike Creek	3,379	4,115	736
Red Lion	183	231	48
U.Christiana	3,702	4,138	436
Wilmington	14,285	16,318	2,033
Totals	56,421	66,082	9,661

While total household growing, Household sizes shrinking

► Growth in the “non-family household”

Between 2000 and 2017:

- NCC added a net of 5,106 Family HHs **Avg. Family HH size 3.26**
- NCC added a net of 11,786 Non-Family HHs. **Avg. Non-Family size 1.29**

A family is a group of two people or more (one of whom is the householder) related by birth, marriage, or adoption and residing together

A nonfamily household consists of a householder living alone (a one-person household) or where the householder shares the home exclusively with people to whom he/she is not related.

Family HHs

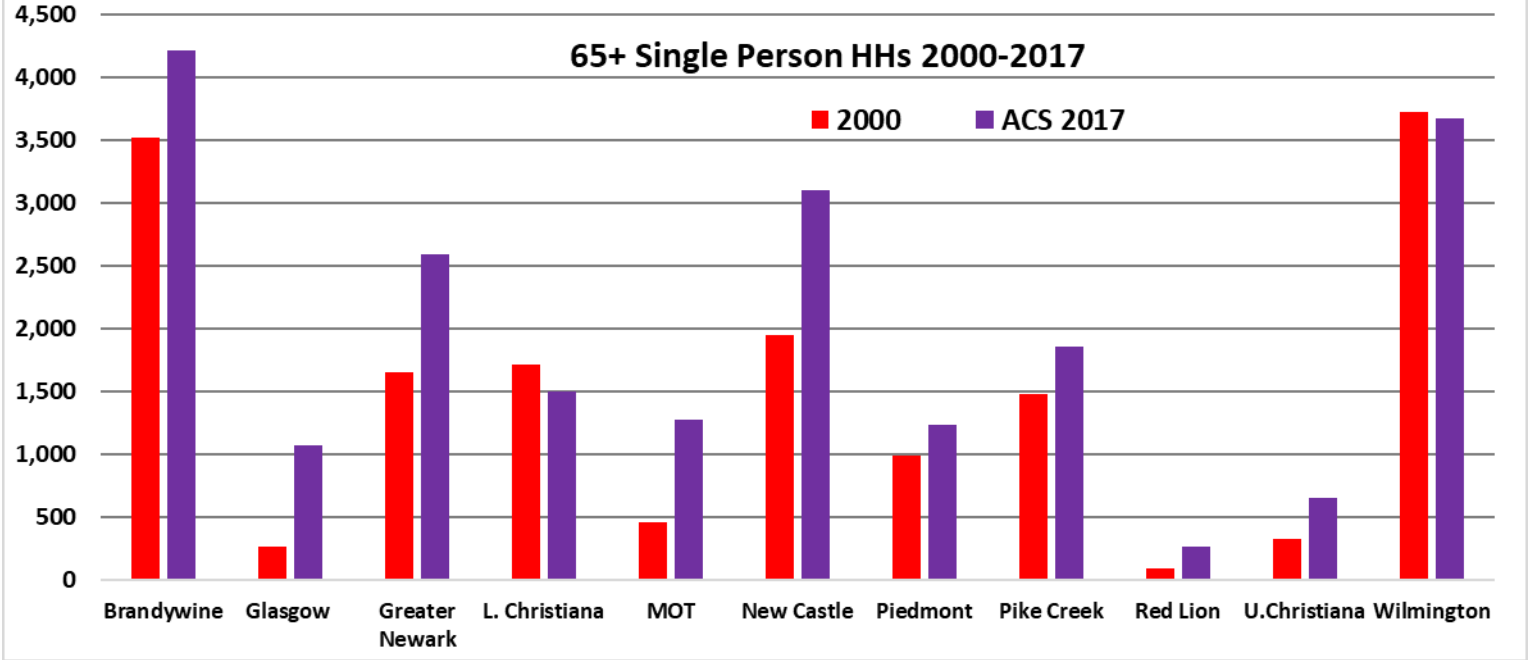
New Castle County	Family HHs Census 2000	Family HHs ACS 2015-19	Change 2000-2017
Brandywine	21,947	20,390	-1,557
Glasgow	8,680	10,477	1,797
Greater Newark	14,437	13,824	-613
L. Christiana	9,630	8,626	-1,004
MOT	7,825	15,875	8,050
New Castle	21,028	20,642	-386
Piedmont	8,564	8,676	112
Pike Creek	11,401	10,520	-881
Red Lion	1,484	2,348	864
U.Christiana	6,229	6,636	407
Wilmington	15,881	14,198	-1,683
TOTAL	127,106	132,212	5,106

Non-Family HHs

New Castle County	Non Family HHs 2000	Non-Family HHs ACS 2015-19	Change 2000-2017
Brandywine	10,345	11,400	1,055
Glasgow	2,636	4,089	1,453
Greater Newark	8,714	10,530	1,816
L. Christiana	4,866	5,166	300
MOT	1,724	4,026	2,302
New Castle	9,281	11,276	1,995
Piedmont	2,090	2,481	391
Pike Creek	5,772	5,923	151
Red Lion	422	825	403
U.Christiana	3,243	3,291	48
Wilmington	12,736	14,608	1,872
TOTAL	61,829	73,615	11,786

65+ Single Person HHs

% of Total Households
2000: 8.0%
2016 10.4%



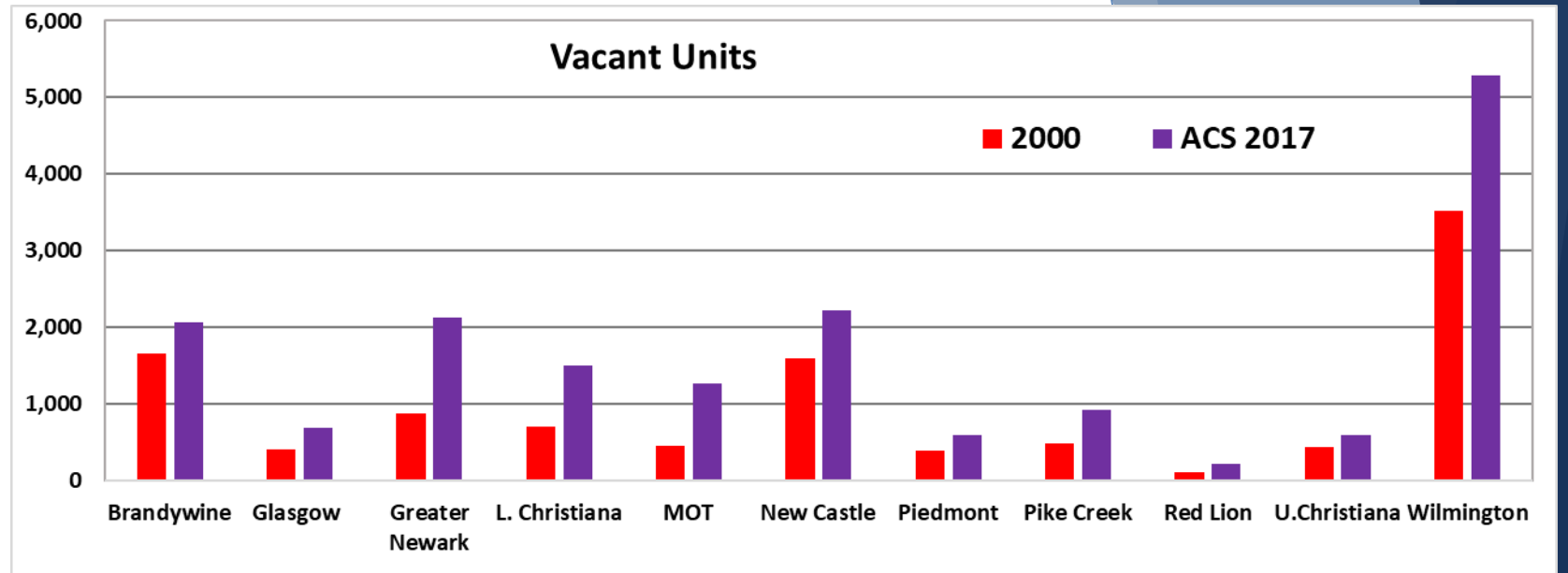
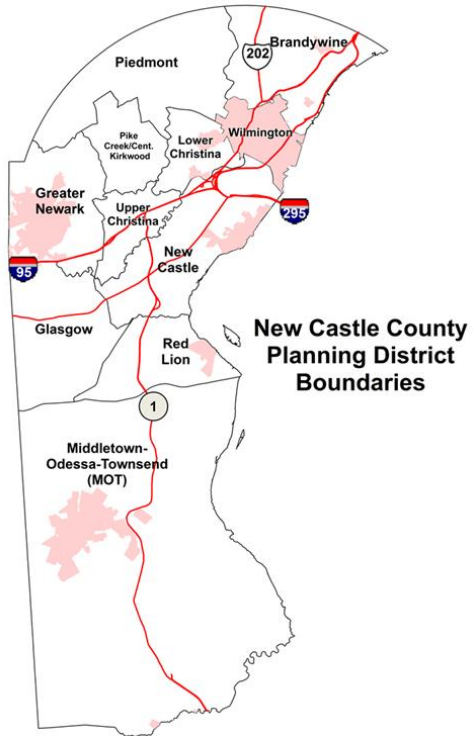
Changes in Age 65+ Single Person HHs: 2000-2017

5 Districts
have
15,427
65+ Single
person
HHs (72%)

New Castle County	65 +Single Person HHs Census 2000	65 +Single Person HHs ACS 2015-19	2000 - 2017 Change
Brandywine	3,516	4,214	698
Glasgow	265	1,067	802
Greater Newark	1,652	2,588	936
L. Christiana	1,715	1,501	-214
MOT	457	1,274	817
New Castle	1,942	3,099	1,157
Piedmont	982	1,235	253
Pike Creek	1,474	1,856	382
Red Lion	90	266	176
U.Christiana	322	653	331
Wilmington	3,723	3,670	-53
TOTAL	16,138	21,423	5,285

Note: 2017 is the midpoint of the 2015-19 5 year avg.

Vacant Households

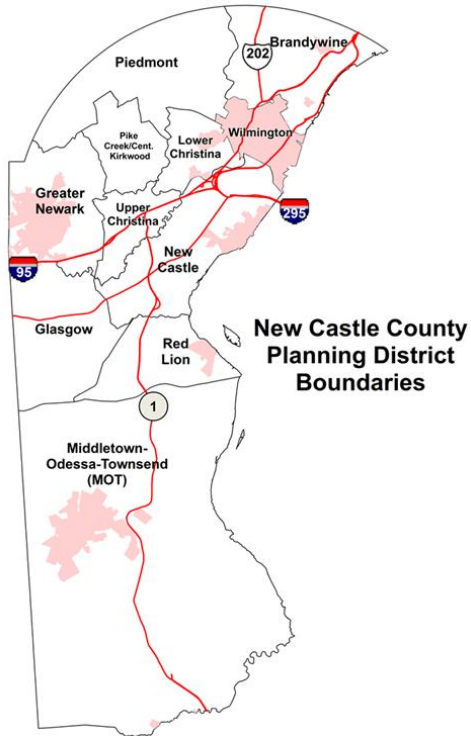


Changes in Vacant Households 2000-2017

New Castle County	Vacant Units 2000	Vacant Units ACS 2015-19	Change 2000-2017
Brandywine	1,648	2,058	410
Glasgow	408	676	268
Greater Newark	863	2,127	1,264
L. Christiana	698	1,490	792
MOT	455	1,267	812
New Castle	1,597	2,222	625
Piedmont	390	588	198
Pike Creek	472	919	447
Red Lion	108	211	103
U.Christiana	426	594	168
Wilmington	3,521	5,278	1,757
TOTAL	10,586	17,430	6,844

Note: 2017 is the midpoint of the 2015-19 5 year avg.

Vacant Households



“Other Vacant” Includes

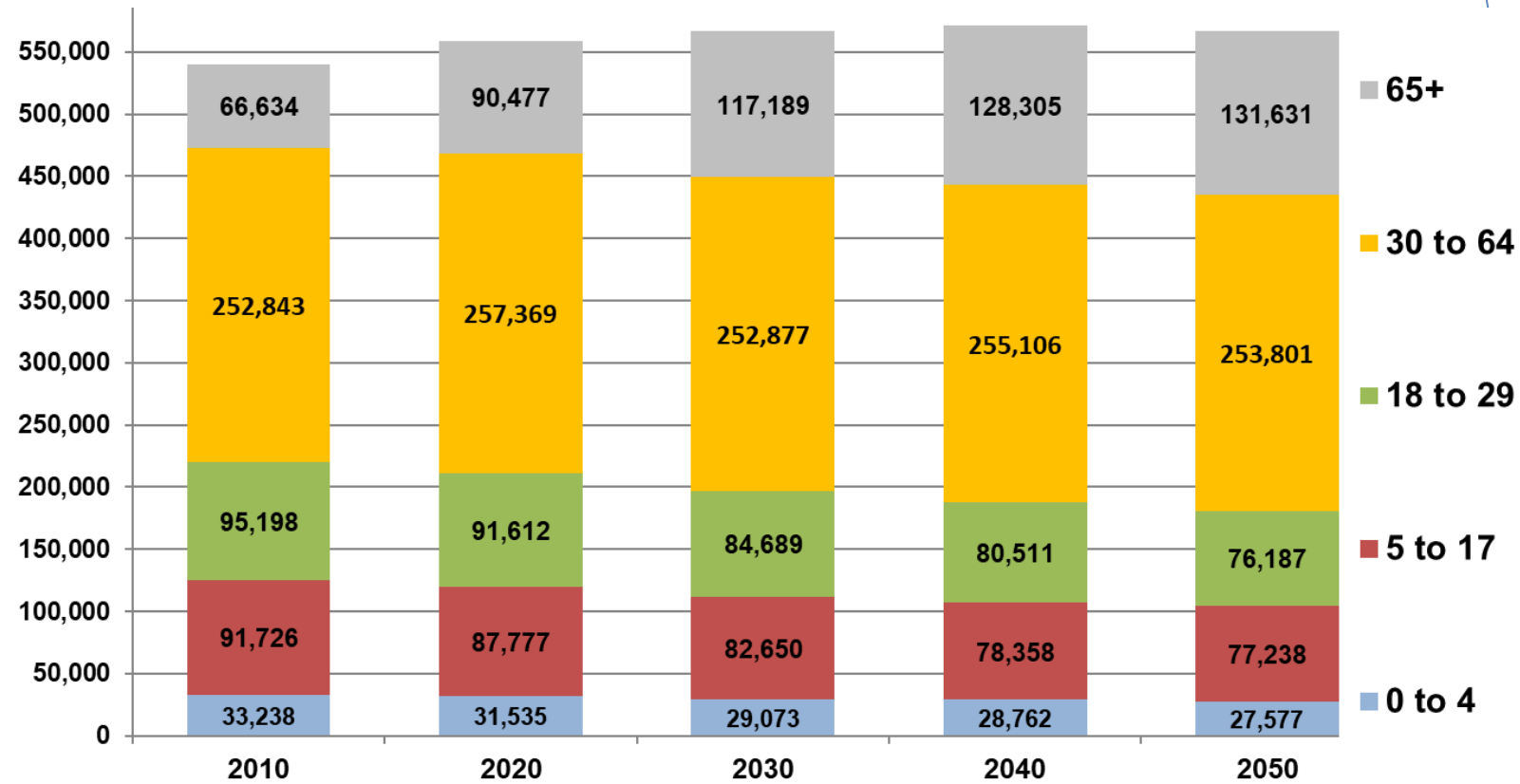
- Foreclosure.
- Personal/Family Reasons.
- Legal Proceedings.
- Held for Storage of Household Furniture.
- Needs Repairs.
- Currently Being Repaired/Renovated.
- Abandoned/Possibly to be Demolished/Possibly Condemned.

	Total Vacant	For Rent/sale	Rented or Sold, not occupied	For seasonal, recreational, or occasional use	Total Other vacant	% Other Vacant
2000 Census						
Brandywine	1,648	1,157	101	144	245	15%
Central Pencader	408	262	47	29	70	17%
Greater Newark	863	662	42	46	113	13%
Lower Christiana	698	435	53	16	194	28%
Middletown-Odessa	455	208	62	30	154	34%
New Castle	1,597	878	119	271	326	20%
Piedmont	390	155	49	39	134	34%
Pike Creek-Central Kirkwood	472	320	51	42	59	13%
Red Lion	108	65	10	3	30	28%
Upper Christiana	426	290	46	21	69	16%
Wilmington	3,521	1,694	347	66	1,413	40%
Totals	10,586	6,126	927	707	2,807	27%

	Total Vacant	For Rent/sale	Rented or Sold, not occupied	For seasonal, recreational, or occasional use	Total Other vacant	% Other Vacant
2017 ACS						
Brandywine	2,058	907	230	55	866	42%
Central Pencader	676	416	132	37	91	13%
Greater Newark	2,127	1,269	155	81	622	29%
Lower Christiana	1,490	749	69	27	645	43%
Middletown-Odessa	1,267	413	196	178	480	38%
New Castle	2,222	865	134	104	1,119	50%
Piedmont	588	273	44	34	237	40%
Pike Creek-Central Kirkwood	919	413	33	23	450	49%
Red Lion	211	65	11	19	116	55%
Upper Christiana	594	411	0	0	183	31%
Wilmington	5,278	1,862	1025	133	2,247	43%
Totals	17,430	7,643	2,029	691	7,056	40%

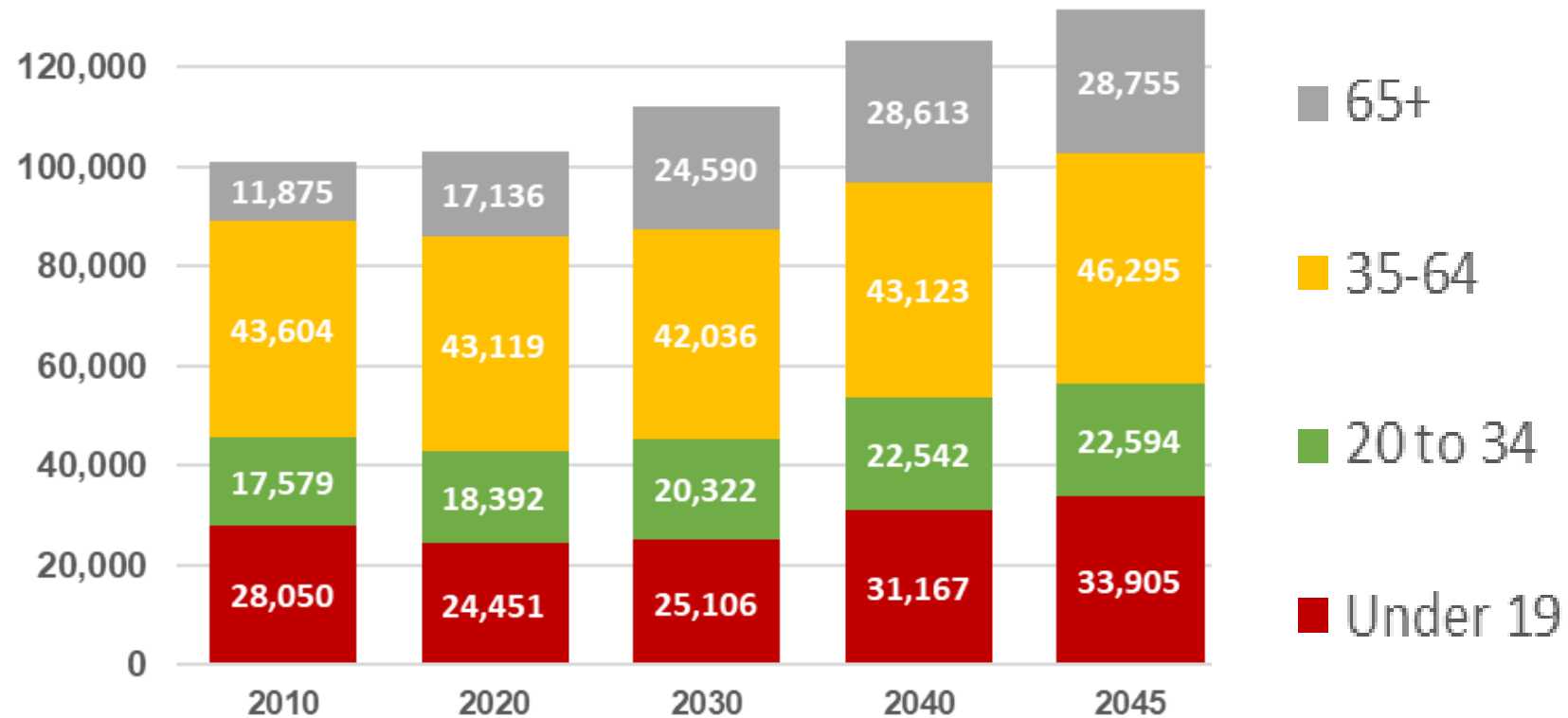
New Castle Population Growth by Age

New Castle	2010	2020	2030	2040	2050	2020- 2050 Change
0 to 4	33,238	31,535	29,073	28,762	27,577	-3,958
5 to 17	91,726	87,777	82,650	78,358	77,238	-10,539
18 to 29	95,198	91,612	84,689	80,511	76,187	-15,425
30 to 64	252,843	257,369	252,877	255,106	253,801	-3,568
65+	66,634	90,477	117,189	128,305	131,631	41,154
Total	539,640	558,771	566,477	571,042	566,434	7,663



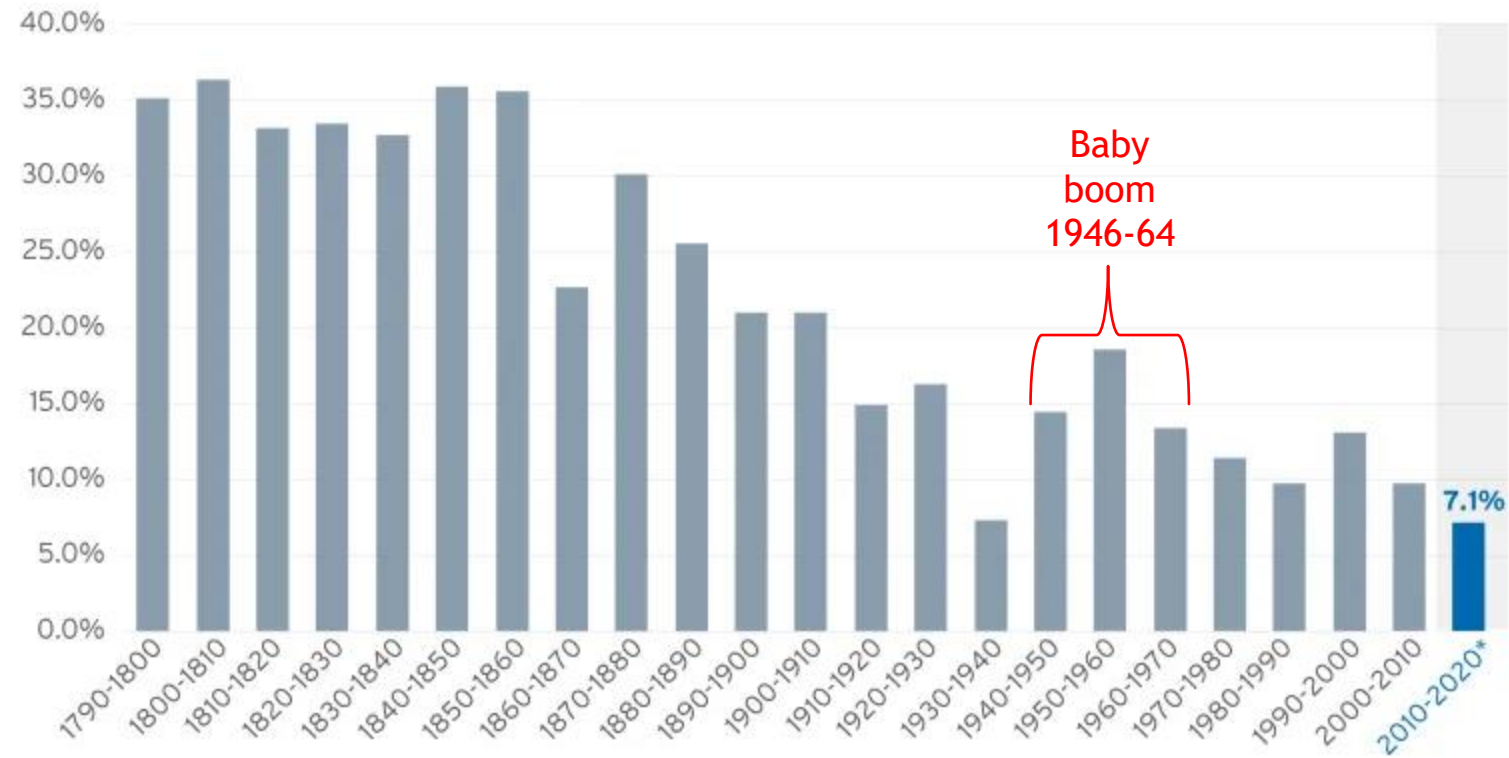
Cecil Population Growth by Age

	2010	2020	2030	2040	2045	2020 - 2045 Change
Under 19	28,050	24,451	25,106	31,167	33,905	9,454
20 to 34	17,579	18,392	20,322	22,542	22,594	4,202
35-64	43,604	43,119	42,036	43,123	46,295	3,176
65+	11,875	17,136	24,590	28,613	28,755	11,619
Total	101,108	103,098	112,054	125,445	131,549	28,451



National Picture:

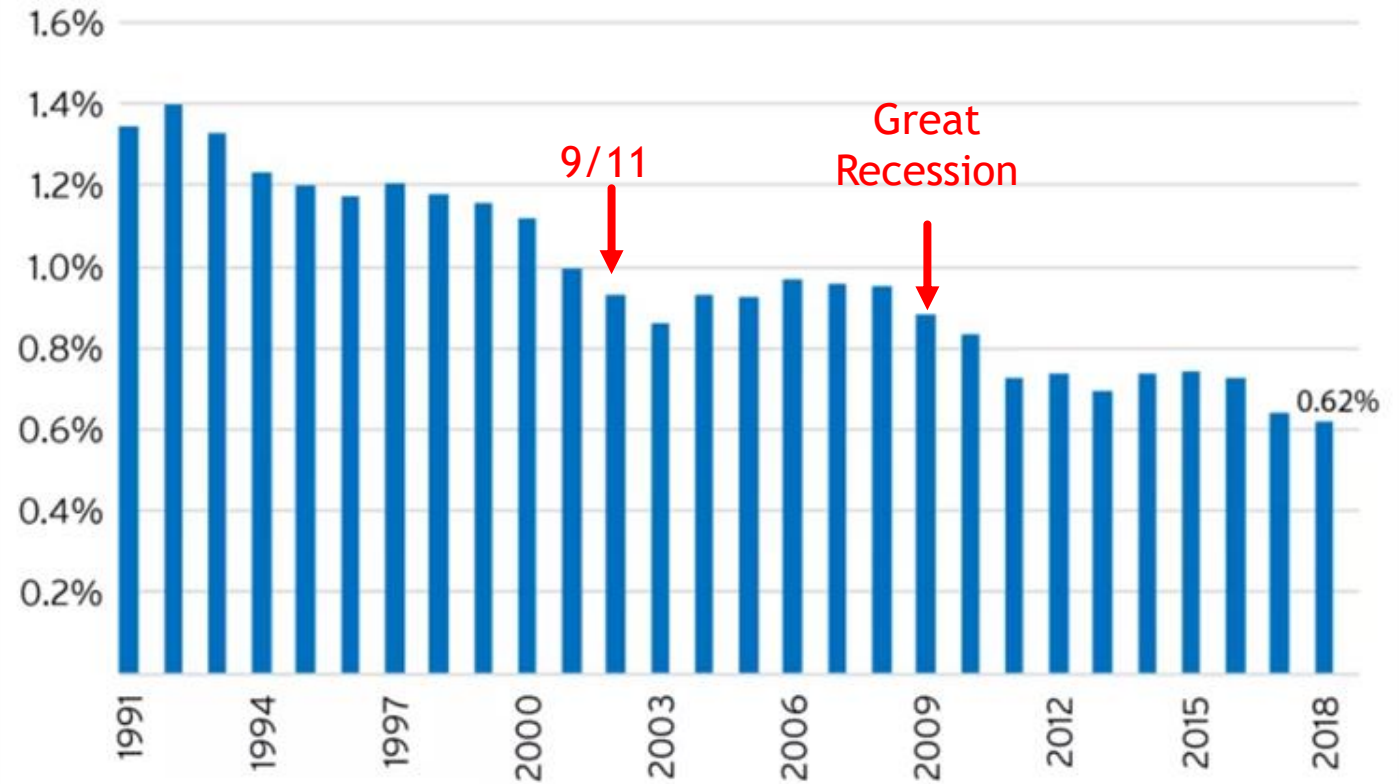
- U.S. is GROWING, but SLOWING
 - Population continues to “gray”
 - Deaths catching up to Births
 - Immigration becoming larger part of growth
-
- Slowest decade of growth ever, even less than 1930's



National Picture:


- U.S. is GROWING, but SLOWING
 - Population continues to “gray”
 - Deaths catching up to Births
 - Immigration becoming larger part of growth
-
- Slowest decade of growth ever, even less than 1930's
 - Consistent trend through last 30 years, with larger drops post 9/11 and great recession
 - Loss in population under age 18. decline of 1.14 million youth between 2010 and 2019

US Annual Population Growth 1991-2018



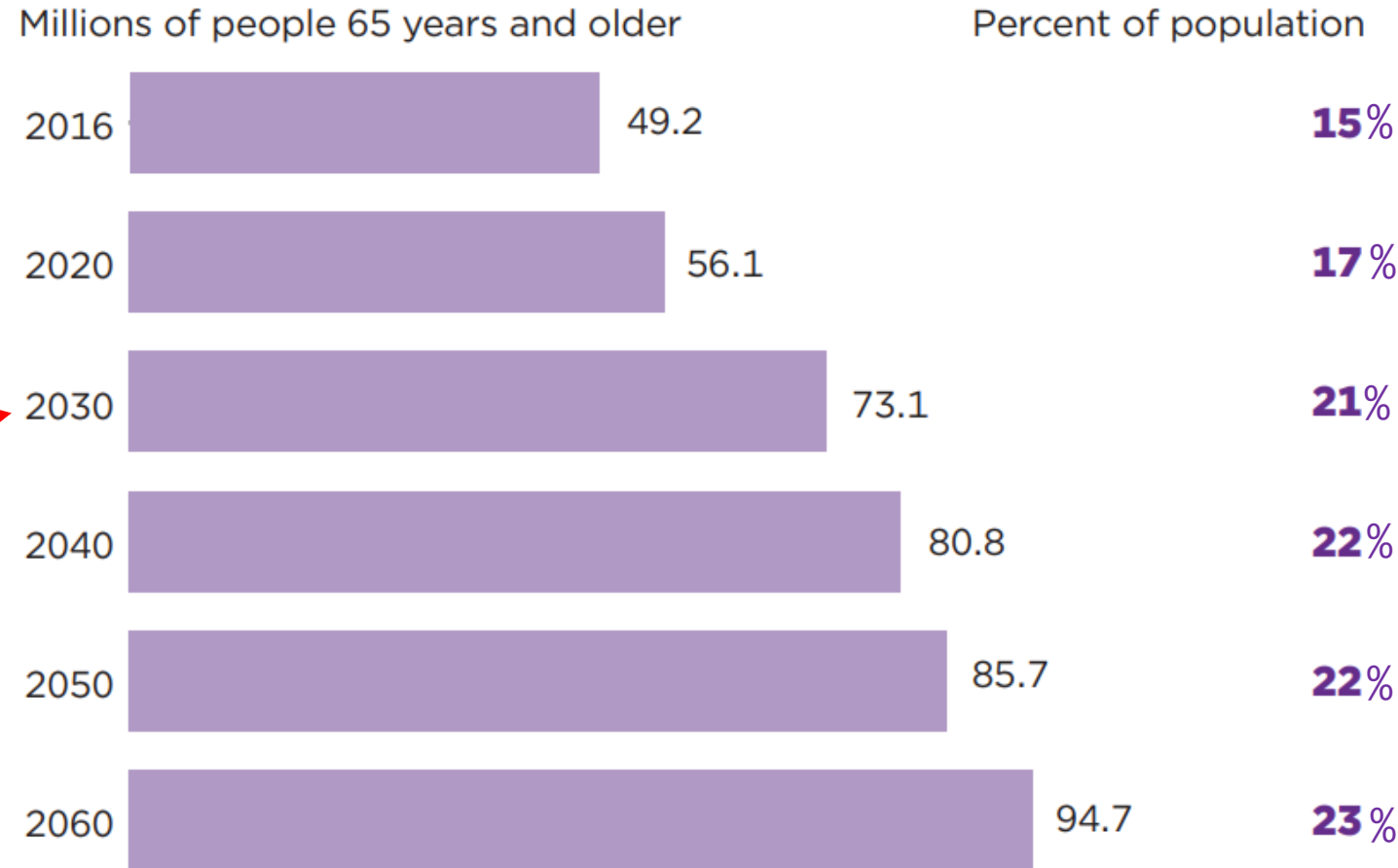
Note: Year shown represents the preceding 12 month period ending July 1.

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- By 2030, All boomers will be 65+ 
 - By 2034, older adults will outnumber children under 18 for the first time in U.S. history

Projections of the Older Adult Population: 2020 to 2060

By 2060, nearly one in four Americans is projected to be an older adult.

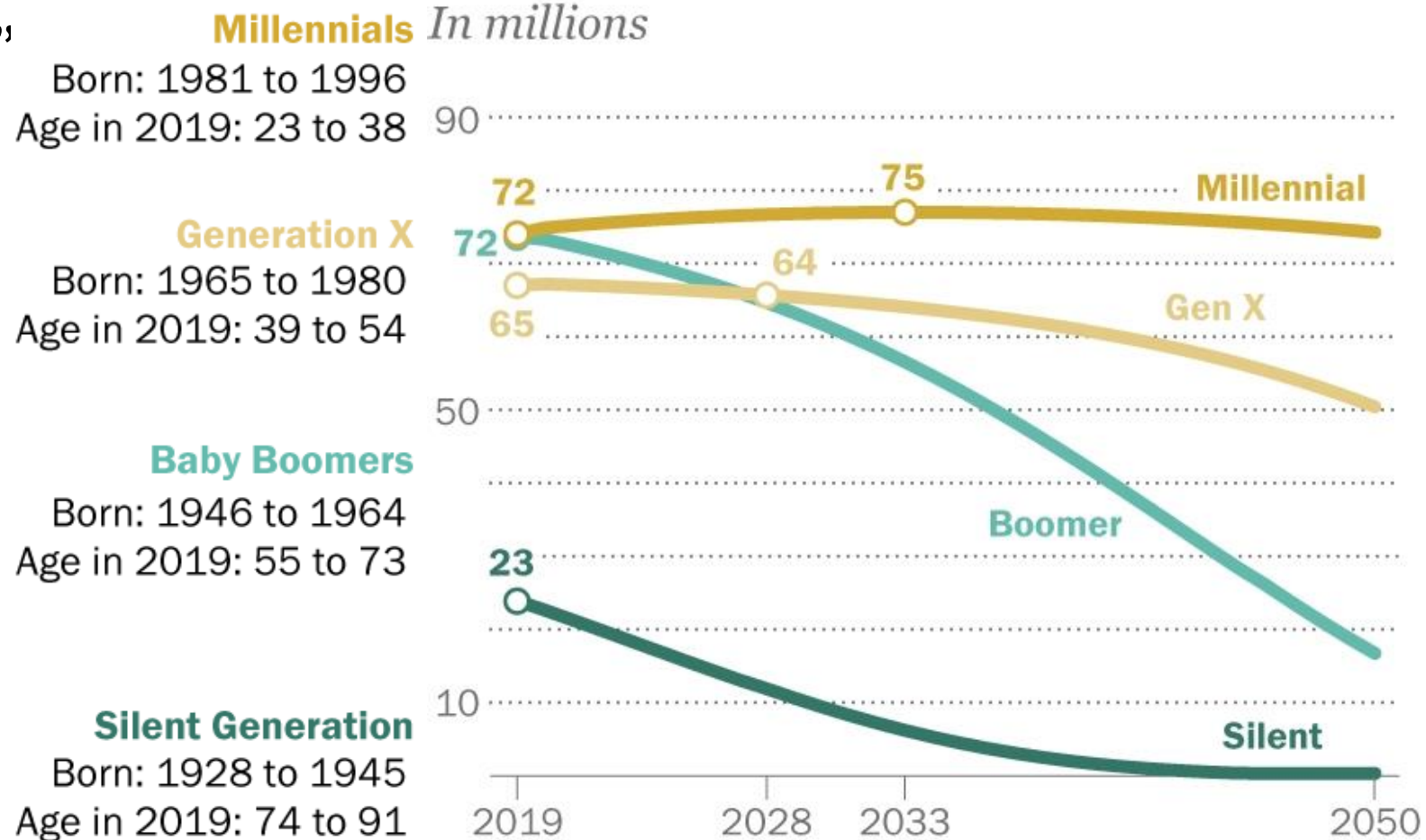


Source: U.S. Census Bureau, 2017 National Population Projections.

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- By 2030, All boomers will be 65+
 - By 2034, older adults will outnumber children under 18 for the first time in U.S. history
 - Boomers already smaller group than millennials!

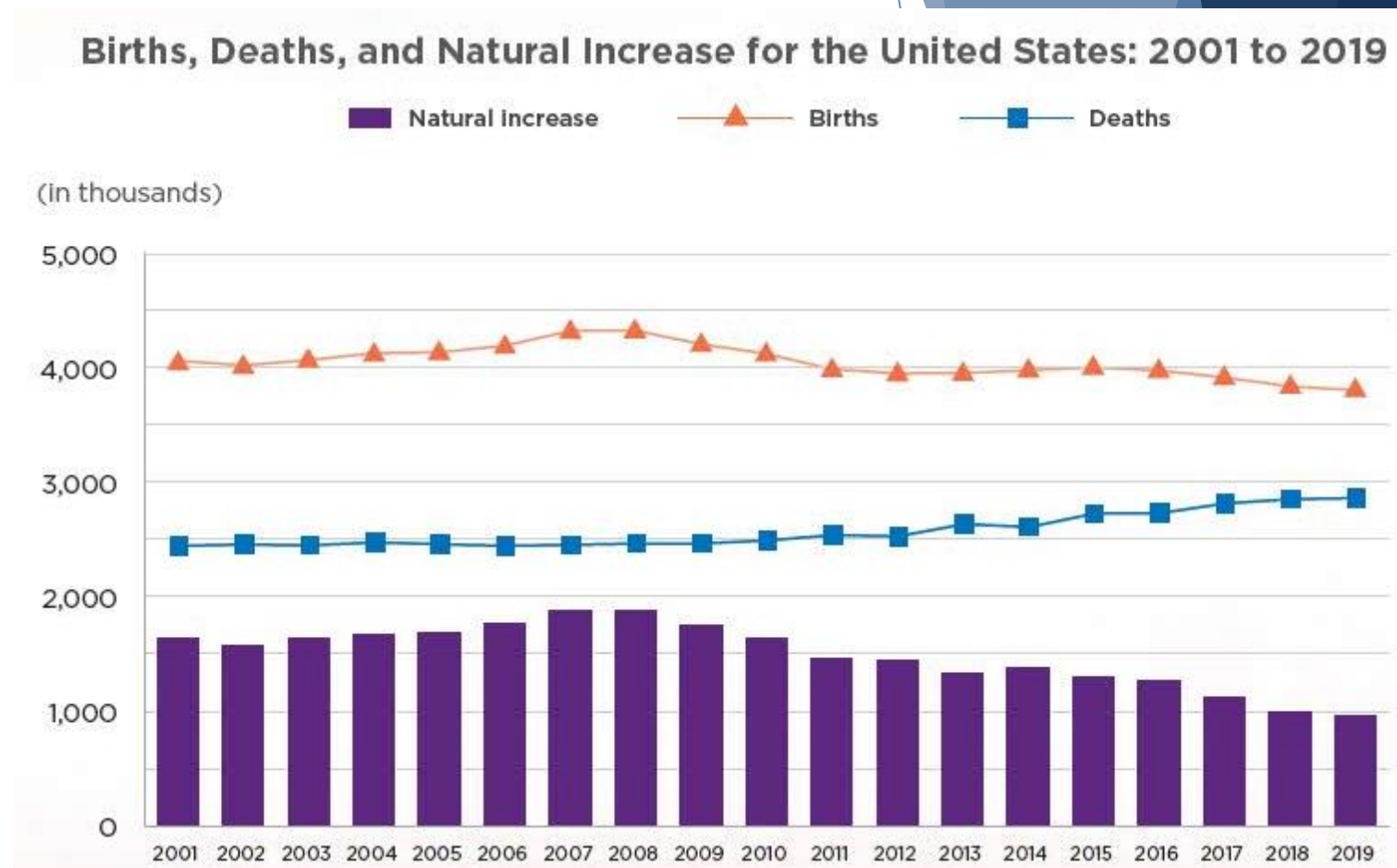
Projected population by generation



Source: Pew Research Center tabulations of U.S. Census Bureau population estimates released April 2020 and

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- 2019, US fell below 1 million in Natural Increase
 - Varies by part of country
 - Four states had more deaths than births in 2019:
West Virginia (-4,679), Maine (-2,262), New Hampshire (-121) Vermont (-53).



National Picture:

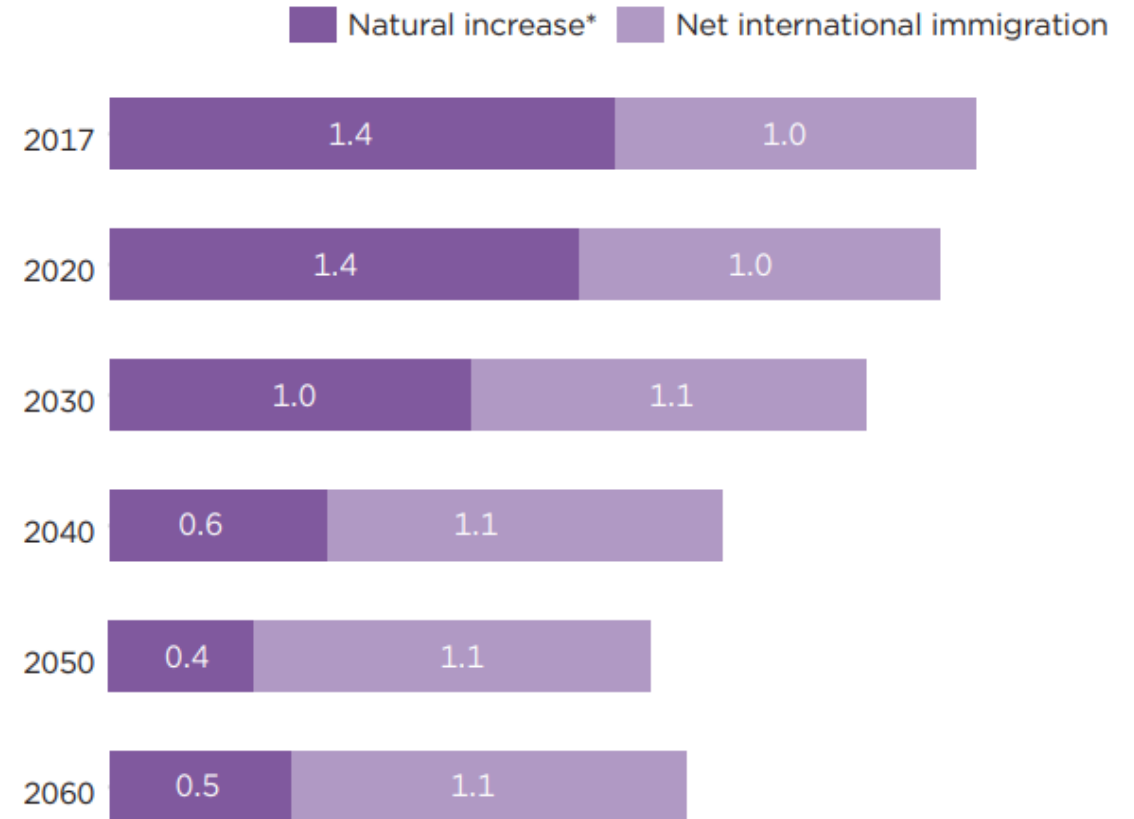
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- In 2030, net immigration is projected to overtake natural increase (the excess of births over deaths) as the primary driver of population growth for the country
- Becomes MORE difficult to predict future population

Projected Population Change From Natural Increase and Net International Migration: 2017 to 2060

Starting in 2030, net international migration is projected to become the largest driver of population growth in the United States.

(In millions)



* Natural increase is the number of people born into the population after subtracting the number of people who have died (i.e., births minus deaths).

Source: U.S. Census Bureau, 2017 National Population Projections.