



Photo Credit: LSA Planning

Housing Needs + Market Analysis

Sussex County, Delaware
May 2019



Key Findings

This housing needs and market analysis examines the demographic, economic, and market trends that drive current and future demand for housing in Sussex County. This report is the first deliverable in the Housing Opportunities and Market Evaluation that is being prepared by LSA Planning in collaboration with County staff. The results in this report, as well those in the 2018 update to the Comprehensive Plan, will provide a framework for a housing strategy that promotes housing choice and economic vitality for Sussex County residents and its workforce. The following are key findings in this report:

- › Sussex County has experienced steady population growth in recent years and is growing faster than both Kent County and New Castle County. The primary driver of the population growth has been among adults older than 65. While there has been some growth in households with children, Sussex County is not attracting families the same way as it has retirees. If trends continue, more Sussex County residents will rely on fewer working-age residents to support the local economy.
- › Household size has declined slightly with more households living without children, including 24% of households who live alone. These changing household dynamics will impact the demand for certain housing types, implying the need for smaller homes.
- › In recent years, the fastest growing income group has been households with incomes above \$150,000. At the same time, there has been a decline in the number of households that earn less than \$20,000. Higher-earning households can put upward pressure on home prices and rents that make housing unattainable for lower-income households.
- › The Sussex County economy is highly dependent on tourist-supporting industries, including the Accommodations and Food Services and Retail Trade sectors. Jobs in these sectors account for 31% of total employment in the County alone. However, pay is typically lower on average (\$20,000s and below) and workers in these sectors face limited affordable housing choices in the County.
- › Health Care and Social Assistance is another large and growing industry in Sussex County with higher wages (\$50,000s) on average than jobs in the tourism industry. While wages are somewhat higher, there is a range of lower-wage occupations (e.g. home health aides, administrative) that suggest a growing need for lower-priced homes to accommodate growth in this sector.
- › Manufacturing has declined in the last several years, but is still one of Sussex County's largest economic drivers, largely attributed to agricultural-supporting manufacturing. Poultry processing and farm workers earn low wages (at or slightly higher than minimum wage) and face significant hurdles accessing affordable transportation options.
- › Sussex County has a relatively high homeownership rate that remained fairly stable even during the housing market downturn. Although homeownership rates have increased in the last few

years, rates among younger households (i.e. under age 45) are substantially lower than the countywide homeownership rate.

- › The number of lower-cost homes—with rents and prices that are affordable to nearly half of Sussex County’s workforce—has either declined or is not growing as quickly as higher-cost housing.
 - In the for-sale market, homes valued less than \$300,000 make up less of the owner-occupied homes, declining from 68% in 2012 to 56% in 2017. During the same period of time, homes valued over \$400,000 are increasing and representing a larger portion of the housing stock, representing 26% of owner-occupied homes, up 10% since 2012.
 - In the rental market, median gross rent in the County has risen 10% since 2012 with the greatest increases among units priced between \$1,000 and \$1,500. While Western Sussex County has lower median rents than Eastern Sussex County, the median rent in Western Sussex County has increased at a faster rate in the last several years than it has in the Eastern part of the County.
 - Manufactured housing can be a source of lower-cost housing, but makes up less of a share of the total housing stock than it did several years ago, given the growth in detached, single-family housing development.

- › The seasonal population in Sussex County creates a unique housing market with a substantial number of units that are occupied on a seasonal basis. Nearly 50,000 housing units are considered “vacant” without a year-round occupant. The vast majority (nearly 42,000) of these units are vacant for seasonal use and located in Eastern Sussex County. High seasonal vacancy can limit the supply of housing available to residents who live in the community year-round, contributing to upward pressure on rents and home values.

- › While Eastern Sussex County’s median home values rose 3% between 2012 and 2017, Western Sussex County’s home values declined 6%. Western Sussex County has a higher rate of “other vacant” units – that is, housing units that may be vacated for a variety of reasons, but many times related to homes in such disrepair that the home is uninhabitable. The number of units vacant for “other” reasons has been steadily growing over the last several years (nearly 5,000 homes are vacant for “other reasons”), and more than half of the “other vacancy” is located in Western Sussex County.

- › About 30% of all Sussex County households – 48% of renters and 26% of homeowners- are housing cost burdened, spending 30% or more of their income each month on housing costs. Spending a disproportionate share of income towards housing can leave too little for other necessities like food, health care, and transportation.

- › Housing and transportation data suggest that many households move further away from neighborhoods near jobs, services, and other amenities in order to afford housing. In doing so, some households will spend a disproportionately higher amount on transportation costs, outweighing any savings gained from living in lower-cost areas in the County. The average Sussex

County household spends 30% of their income on housing costs. With transportation factored in, households spend 56% on average for both housing and transportation.

- › Population projections suggest that Sussex County will gain approximately 17,500 net new households between 2020 and 2050. The County will need to plan for housing affordable at a range of incomes, including 3,935 units affordable to households earning less than 50% of the area median income (AMI) and 2,938 units for households that earn between 50-80% AMI.

Summary of Conclusions

The results from this analysis of population, employment, and affordability trends, as well as the State's projections of new households, suggest three conclusions that will shape a housing strategy for Sussex County:

- › First, cost-burden data suggest that many individuals and families are unable to afford a home without spending a disproportionately high share of their income on housing and transportation. There is a need for more housing affordable to working individuals and families, particularly among households in lower-wage jobs.
- › Second, Sussex County's population and real estate growth is projected to continue over the next decade at nearly the same rates as they have in the last few years. There is an immediate need to identify obstacles (e.g. financial, regulatory) that have limited the supply of housing affordable to its workforce.
- › Third, the market may be able to better meet demands of housing for higher-income households; but in order to ensure that low- and moderate-wage working individuals and families can find housing they can afford, Sussex County should consider proactive financing and regulatory strategies consistent with housing market and economic conditions. The appropriate regulatory framework and incentives can allow for the private market to deliver more diverse housing options.



Table of Contents

| | |
|---|----|
| Key Findings | 1 |
| Summary of Conclusions | 3 |
| Key Definitions | 6 |
| About the Data Used in this Report | 8 |
| Introduction | 9 |
| Demographic Trends | 10 |
| Resident Population..... | 10 |
| Age Composition..... | 10 |
| Race and Ethnicity..... | 11 |
| Households | 13 |
| Household Size..... | 13 |
| Household Composition | 13 |
| Housing Tenure | 15 |
| Homeless Population | 18 |
| Employment | 19 |
| Jobs | 19 |
| Commuting Patterns..... | 22 |
| Housing Market Conditions | 23 |
| Housing Types | 24 |
| Age of Structure | 25 |
| Housing Quality..... | 26 |
| Rental Market | 26 |
| Subsidized Housing | 28 |
| Evictions..... | 29 |
| For-Sale Market..... | 30 |

New Construction 31
Foreclosures 32
Cost-burden Characteristics..... 34
Workforce Housing Needs 35
 Current Housing Needs..... 35
 Future Housing Needs..... 36
Conclusion 38
APPENDIX 40

Key Definitions

Affordable Housing – Housing costs makes up 30 percent or less of the household income. For renters, housing costs include monthly gross rent plus renter-paid utilities. For owner households, housing costs include payments for mortgages, debts on the property, real estate taxes, insurance on the property, and utilities).

Center for Neighborhood Technology Housing + Transportation Index – An index that incorporates transportation costs into the equation of housing affordability. The affordability benchmark used by the index is 45 percent of household income used on housing costs and transportation costs combined.

Eastern Sussex County – Communities located along the 113 corridor (except for Georgetown), beach communities, and communities east of 113.

Gross Rent – The contract rent plus the estimated average monthly cost of utilities (electricity, gas, and water and sewer) and fuels (oil, coal, kerosene, wood, etc.) if these are paid by the renter (or paid for the renter by someone else).

Home Investment Partnerships Program – A federal program- often in partnership with a local nonprofit- to fund the building, acquisition, or rehab of affordable housing for rent or homeownership. The federal government gives grants to Participating Jurisdictions who direct the funds in grant or loan form to community partners.

Household – A household includes all the persons who are current residents of a housing unit. The occupants may be a single family, one person living alone, two or more families living together or any other group of related or unrelated persons who share living arrangements.

Housing Cost Burdened – Households who pay more than 30 percent of their income for housing.

Housing Tenure – The financial arrangements under which a household occupies all or part of a housing unit. The most common types of tenure are ownership and rental.

Housing Unit – A house, an apartment, a group of rooms, or a single room occupied or intended for occupancy as separate living quarters. Separate living quarters are those in which the occupants do not live and eat with other persons in the structure and which have direct access from the outside of the building or through a common hall. Housing units may be permanently occupied, seasonally occupied or vacant.

Low Income Housing Tax Credit Program – Often referred to as the LIHTC program, this is an indirect federal subsidy created to incentivize private developers and investors to finance the construction and rehabilitation of low-income housing.

Multifamily housing – Based strictly on design, multifamily housing is a structure that has more than one residential unit, which are typically on multiple floors. The data presented in this report includes structures with 3 or more residential units. This is split further between small multifamily housing (3-19 units) and larger multifamily housing (20+ units).

Key Definitions

Severely housing cost burdened – Households who pay more than 50 percent of their income for housing.

Western Sussex County – Communities located along route 13, the Town of Georgetown, and communities between 113 and route 13.

Workforce Housing – Housing affordable to any individual with a job or any household with a working member.

United States Department of Agriculture Rural Housing Services – Offers federal grants, loans, and loan guarantees for single- and multi-family housing as well as community facilities in rural communities.

About the Data Used in this Report

The data reported in this Housing Needs Assessment and Market Analysis come primarily from the U.S. Census Bureau's American Community Survey (ACS). The Census Bureau collects data from a sample of residents every year. Unless otherwise noted, in this report, we summarize data from the 2017 ACS, which are statistics collected in 2017 and it is the latest data available.

Introduction

Sussex County is facing challenges to ensure there is sufficient housing supply to meet the needs of its growing population and its workforce. Proximity to the beach and other outdoor attractions, low real estate taxes, and high quality of life has attracted retirees, higher-earning households, and a growing seasonal use of the available housing stock. These changes have fueled growth in the real estate market and the hospitality and health industries. High seasonal vacancy and the number of second homes on the market restrict the supply of houses available to year-round households, contributing to the increase in housing prices. Sussex County's population growth has put upward pressure on market prices for both rentals and for-sale homes, leaving many housing options unaffordable to Sussex County's year-round residents and workforce.

Housing affordability is critical to developing and expanding a community's workforce, and can promote economic diversity and vitality. In addition, when residents are able to afford decent and safe housing, communities are more resilient and better able to bounce back from impacts related to periods of economic downturn or a natural disaster event.

While many communities across the United States face housing affordability issues, there are many unique characteristics about Sussex County that will impact a strategic housing plan, including:

- Its status as a retirement community
- The size of the second-home market
- Seasonal population flows
- A concentration of tourist-supporting employment
- A concentration of agricultural employment
- Location of jobs, and
- Physical land restrictions (i.e. wetlands, State-protected land)

This Housing Needs and Market Analysis summarizes demographic, household, employment, and housing market conditions for the County, and includes an assessment of current housing gaps and projections of future housing demand for the County. Finally, the report also offers a small set of preliminary, high-level recommendations for the County, which will inform a more thorough economic feasibility analysis and policy recommendations.

The 2018 Sussex County Comprehensive Plan and the 2014 Delaware Housing Needs Assessment provides important baseline information about the County. This report builds on and expands these reports in four key ways:

- Updating demographic, economic and housing market data with the most recent data available for Sussex County;
- Adding analysis on key demographic factors that shape the demand for housing specifically in Sussex County;
- Providing more detailed analysis of the local economy and the link between job growth and housing needs, with additional data on commuting, wages and occupations; and

- Evaluating the findings from the State’s housing demand forecasts based on an in-depth review of demographic, economic and housing market conditions in Sussex County.

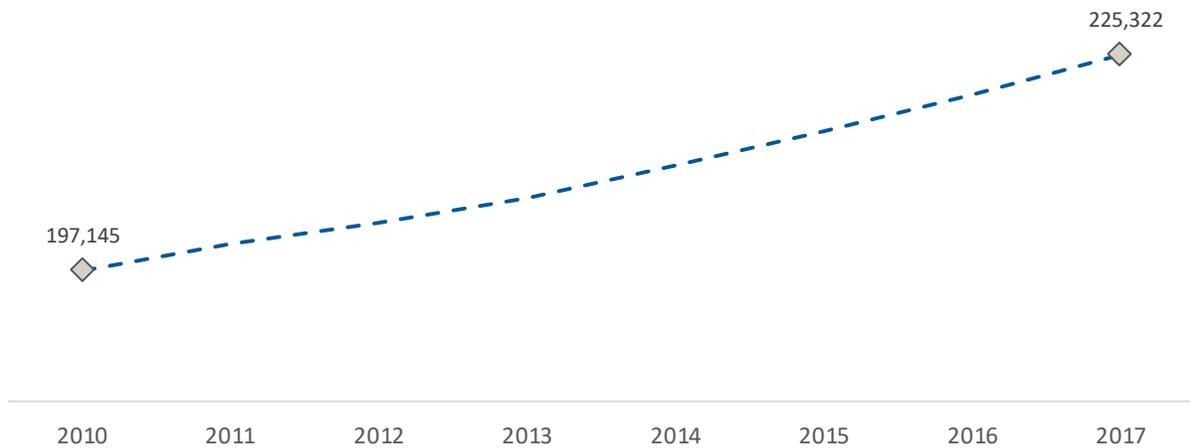
As part of the Sussex County Housing Opportunities and Market Evaluation initiative, specific policy and regulatory recommendations will be developed and compared with the recommendations in both of these key reports.

Demographic Trends

Resident Population

In 2017, Sussex County was home to an estimated 225,322 permanent, full-time residents. Since 2012, the County has experienced rapid population growth, with a net gain of 22,016 residents. For over a decade, Sussex County has been the fastest growing county throughout the region, including the State of Delaware and bordering Maryland counties. From 2012 to 2017, Sussex County’s population growth rate (10%) was double the population growth rate for the state of Delaware overall. Approximately one out of every four residents (23%) in Delaware lives in Sussex County, the second largest county in terms of population in the State. Population projections up to 2050 indicate that Sussex County will continue to grow at faster rates than the State.

Figure 1. Population, Sussex County, 2010 to 2017



Source: U.S. Census Bureau, American Community Survey, LSA
 Source: U.S. Census Bureau, American Community Survey, LSA

Age Composition

Sussex County has a growing older adult population with a growth rate that has been outpacing population increases for other age groups. Since 2012, there was a net gain of 14,533 residents age 65 and older, which accounts for two-thirds of the Sussex County five-year population growth. In 2017, an estimated 27% of the County’s population was 65 or older. The largest spike in growth has been among the 65 to 74-year-old age group, increasing by 36% over that time period. Given the large Baby Boomer population and the attractiveness of the County to retirees, the older adult population in Sussex County

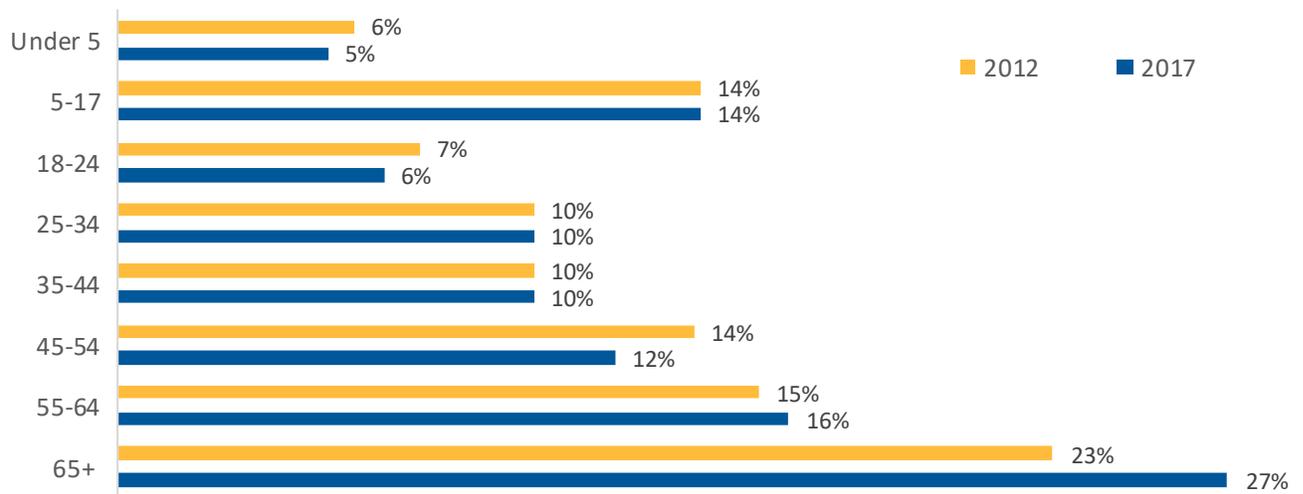
will likely continue to grow and account for an even larger share of the County’s population in the years to come.

A surge in the number of older adults can result in a higher demand for all types of senior housing, including age-restricted independent living, assisted living communities and skilled nursing facilities, as well as increased demand for health care services and assistance to enable aging in place.

Over the past five years, the numbers of young adults and children have increased, but much of the growth in the younger population has been concentrated in Eastern Sussex County. The Cape Henlopen and Indian River School Districts have expanded to accommodate the growth in families with school-aged children, while communities in Western Sussex are declining or not growing as quickly.¹

Because the older adult population is growing at much faster rates, the younger population is slowly becoming a smaller proportion of the population. A slower growing young population can result in a smaller labor force in the upcoming years, particularly as more residents in Sussex County are reaching retirement age. A shrinking labor force can slow local economic growth, making it harder for businesses to locate and/or expand.

Figure 2. Population Share by Age, Sussex County, 2012 to 2017



Source: U.S. Census Bureau, American Community Survey, LSA
 Source: U.S. Census Bureau, American Community Survey, LSA

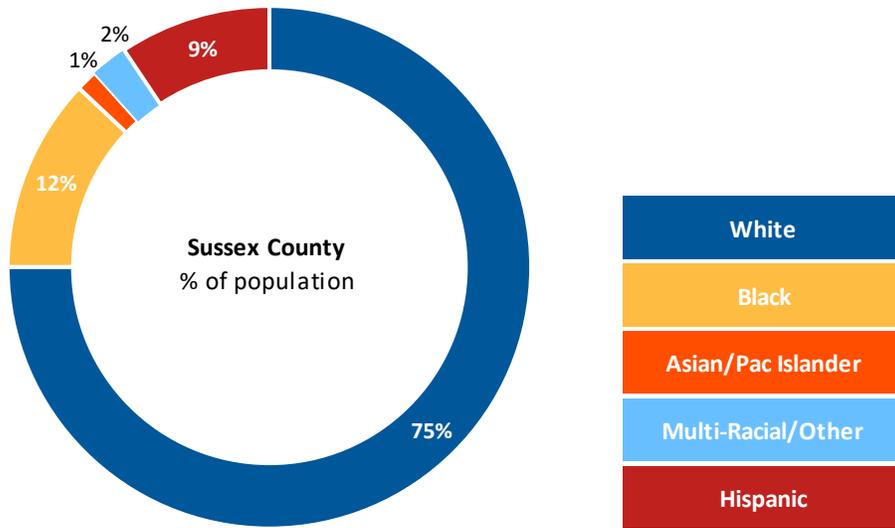
Race and Ethnicity

Sussex County’s racial composition is predominantly White, with an increasingly growing Hispanic community. As of 2017, Sussex County has the highest share of White residents (75%) compared to New Castle County (57%), Kent County (62%), and the state of Delaware as a whole (62%). Caroline County and Worcester County, Maryland share very similar White and Black racial composition with Sussex County. The Black population makes up the second largest racial group in the County (12%), followed by Hispanic population (9%).

¹ Sussex County Office of Planning and Zoning.

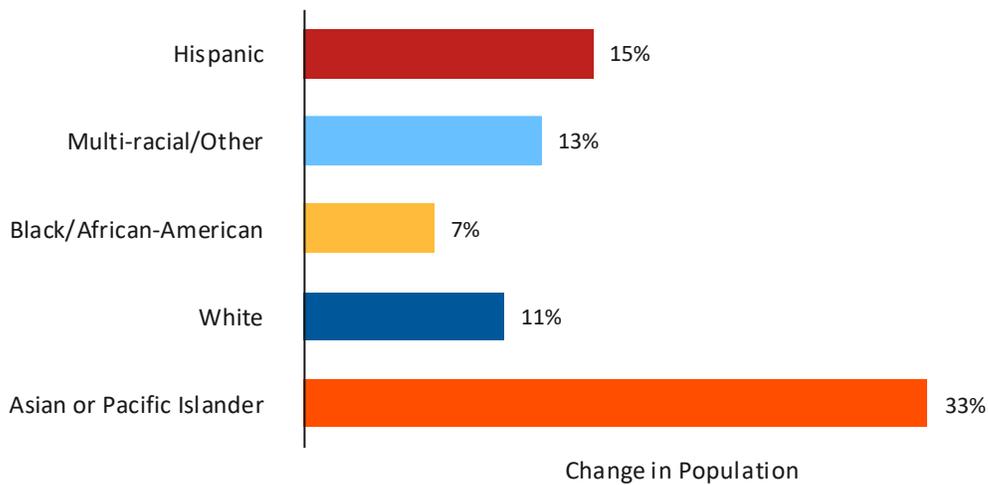
White residents have consistently made up at Eastern three out of every four residents; however, Sussex County’s racial and ethnic makeup is slowly diversifying. Most growth in minorities has been among the Hispanic population, which increased by 2,794 residents between 2012 and 2017. The Black population grew by 1,743 residents during the same period of time. The Asian or Pacific Islander population increased by 33% between 2012 and 2017; however, this group makes up less than 2% of Sussex County’s total population.

Figure 3. Racial/Ethnic Composition, Sussex County, 2017



Source: U.S. Census Bureau, American Community Survey, LSA

Figure 4. Change in Population by Race/Ethnicity, Sussex County, 2012 to 2017



Source: U.S. Census Bureau, American Community Survey, LSA

Households

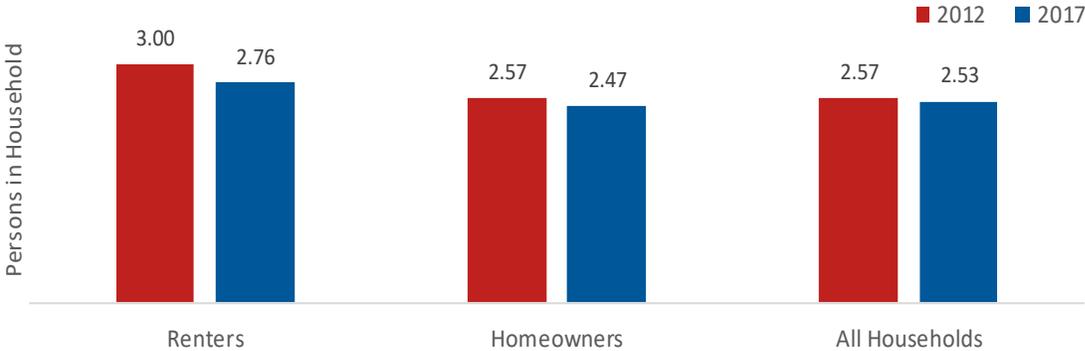
In 2017, there was a total of 88,029 households in Sussex County. Nearly one out of every four households in Delaware is within Sussex County. From 2012 to 2017, Sussex County has had a net gain of 10,034 households, outpacing household growth in Kent and New Castle counties.

Household Size

While the population has increased, the average household size in the County has declined. Between 2012 and 2017, the average household size in the County decreased slightly from 2.57 to 2.53, following a similar trend as Kent County. New Castle County, however, has had an increase in the average household size.

Sussex County has seen the average household size of homeowners and renters fall in the past five years, by .1 and .24, respectively. The biggest drop in average household size occurred among renters. This decline could be related to a number of factors – families who were renting may have purchased a home and/or more people living alone became renters.

Figure 5. Average Household Size, Sussex County, 2012 and 2017

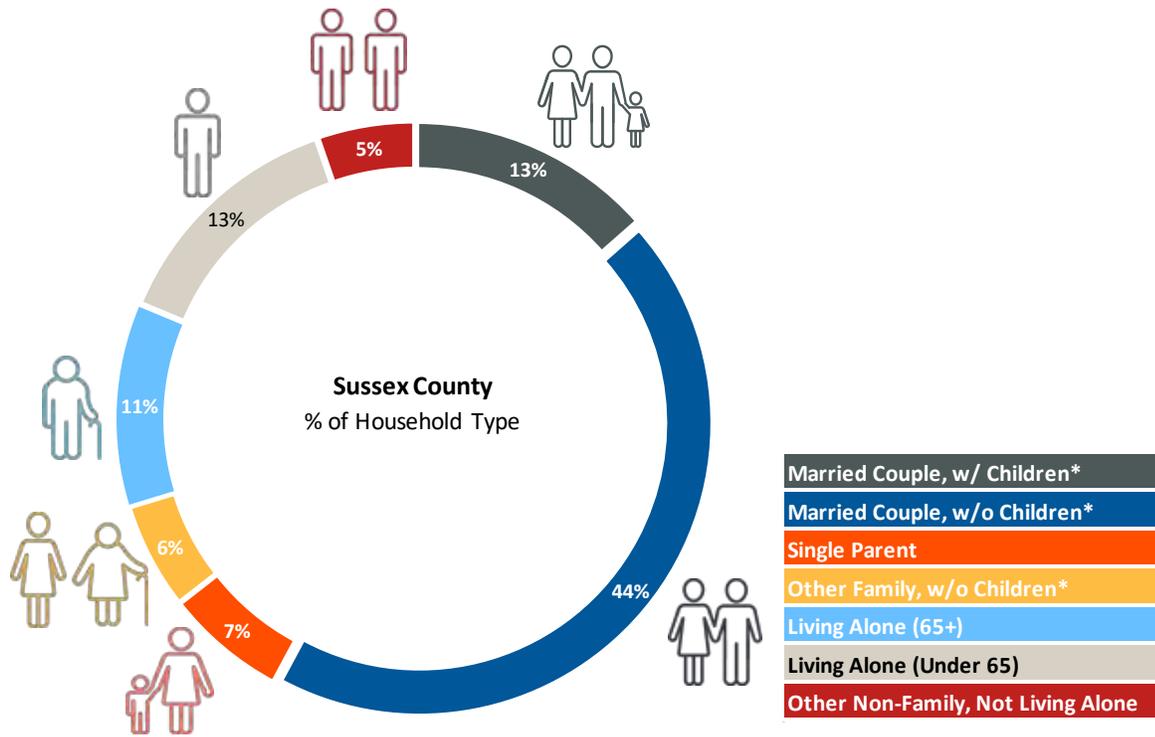


Source: U.S. Census Bureau, American Community Survey, LSA
Source: U.S. Census Bureau, American Community Survey, LSA

Household Composition

The composition of households and families is changing in Sussex County. The largest shift has occurred among households without children, mostly attributed to the retiree population. The number of married-couple households without children has increased faster than other households (increasing by 38%, or about 10,700 additional households, between 2012 and 2017). Married-couple households without children make up 44% of total households in the County. The increase in the share of adults living without children is reflective of national household changes as the growing Baby Boomers become “empty nesters” at the same time as young adults are waiting longer to marry and have children.

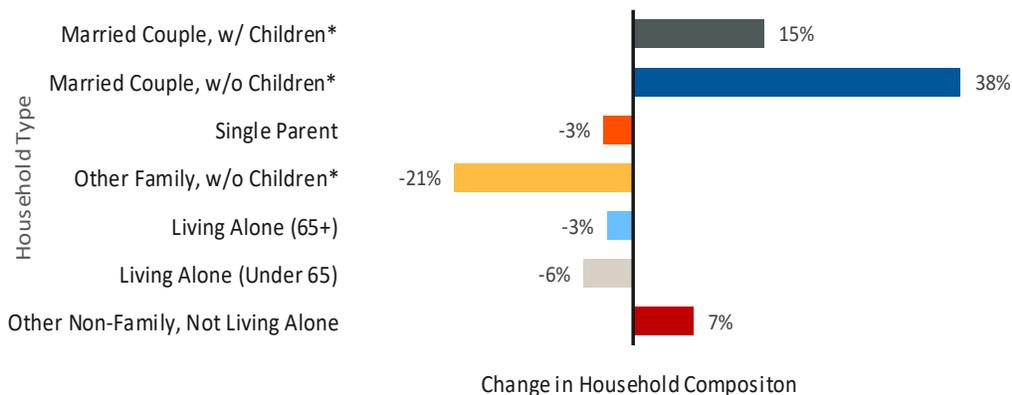
Figure 6. Percent of Households by Household Composition, Sussex County, 2017



Source: U.S. Census Bureau, American Community Survey, LSA

Around one out of every five households has one or more children, including married couples with children (11,877 households) and single-parent households (5,831 households). The number of married couples with children has increased 15% between 2012 and 2017, but remained at 13% of total households in the County. From 2007 to 2012, the number of single-parent households dropped by 17%, and declined another 3% between 2012 and 2017.

Figure 7. Change in Households by Household Composition, Sussex County, 2012 to 2017



Source: U.S. Census Bureau, American Community Survey, LSA

In 2017, about one in every four households (24%) in Sussex County was an individual living alone, including 11% (9,698) who are older than 65. This is a slightly higher share than in Kent County (9%) and New Castle County (10%). Between 2007 and 2012, the number of adults older than 65 living alone increased by 47%, a rate of growth faster than overall household growth. This number, however, has dropped 3% in the last several years.

Adults living alone who are younger than 65 (13% of the households) are more prevalent in both Kent County (16%) and New Castle County (20%).

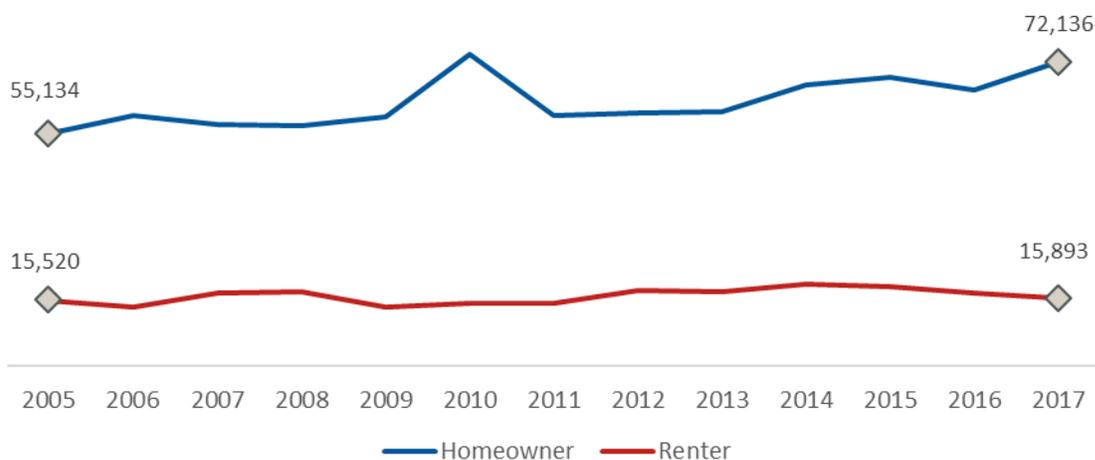
Other non-family households, including roommates, unmarried partners, or caregivers, account for 5% of all households. Although the number of non-family households has been growing the last few years, these households have consistently represented about 5% of total households in the County.

Housing Tenure

Homeowners have historically made up the majority of the households in Sussex County. Even at its lowest point during the recession in 2008, the homeownership rate was over 75%. Since then, rates slightly fluctuated year to year, but on average the homeownership rate in the County has hovered around 79%. The largest change over time occurred between 2010 and 2014, when the homeownership rate dropped 6 percentage points, from 83%, but rates have since slowly inched up each year to 82% in 2017.

Sussex County’s homeownership rate is higher than it is statewide (70%), including over 10 percentage points higher than Kent County (70%) and 16 percentage points higher than New Castle County (66%). It is also higher than most of the bordering Maryland counties and the nationwide rate (64%). Worcester County – home to beach communities and environmentally protected land - has a higher homeownership rate (80%) that more closely resembles Sussex County.

Figure 8. Households by Tenure, Sussex County, 2005 to 2017

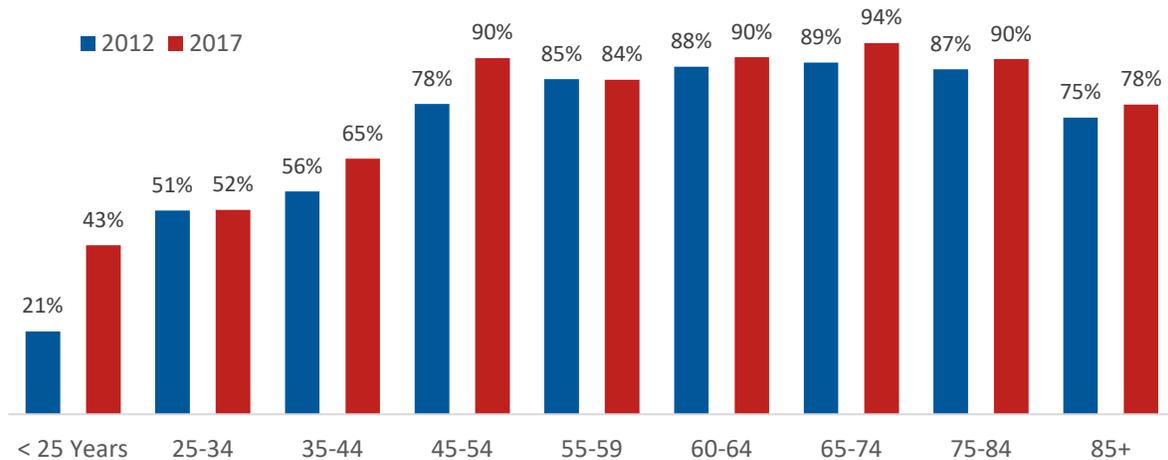


Source: U.S. Census Bureau, American Community Survey, LSA

Homeowners are generally older than renters; more than half (54%) of homeowners are over 60 years old with roughly one out of every four (27%) homeowners between the ages of 65 and 74 years. This age group also has the highest homeownership rate (93%) out of any age group, though most age

groups over 45 have homeownership rates higher than the County rate. As older adults move from their community (e.g. downsize, move closer to family, die), the homes that they once occupied would provide additional supply to other households. While this would loosen the market for potential buyers, younger generations may have different housing preferences.

Figure 9. Homeownership Rates by Age of Household Head, Sussex County, 2012 and 2017



Source: U.S. Census Bureau, American Community Survey, LSA

The high and stable countywide homeownership rate is influenced by a few factors: the large proportion of older adults, who are more likely to own homes; the relative affordability to retirees relocating from more expensive areas; and limited housing choice beyond single-family homes, which are more likely to be occupied by homeowners.

Household Income

Sussex County’s median household income was estimated at \$57,901 in 2017, lower than New Castle County (\$68,336) and the state of Delaware (\$63,036), but similar to Kent County (\$57,647) and the U.S. median (\$57,652). When comparing to neighboring Maryland counties, Sussex County’s median household income is higher with the exception of Worcester County (\$59,458).

There is a relatively even spread of household income within Sussex County. In 2017, one out of every five households (20%) had an annual income that between \$75,000 and \$99,999. This share range of income is also seen in Kent County (21%), while New Castle County (16%) is not as large.

Over the past five years, there has been a shift in the distribution of household incomes in Sussex County. There has been a soaring number of households with incomes greater than or equal to \$50,000 and a decline in the number of households

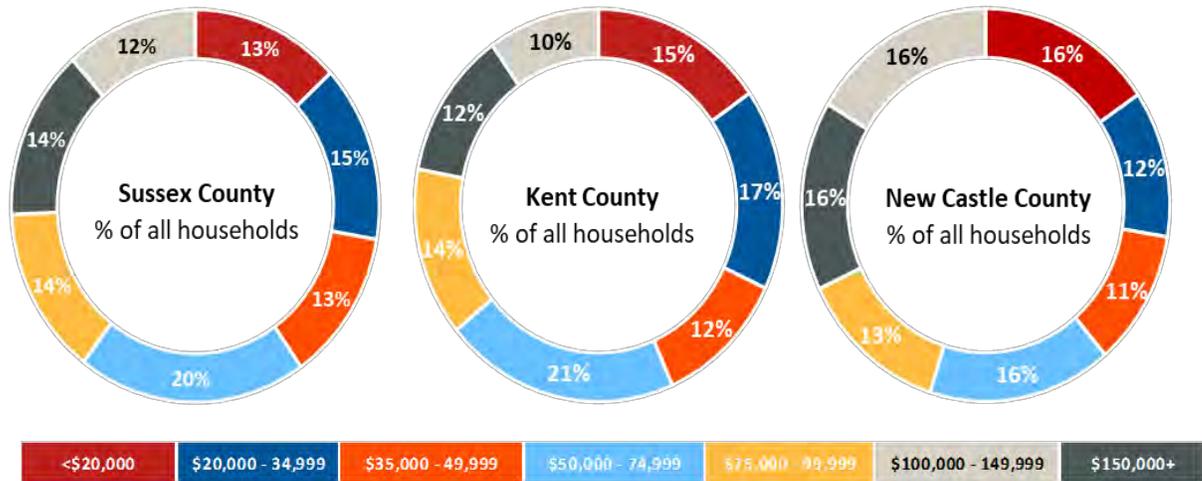
Figure 10. 2017 Median Household Income in Delaware and its Counties



Source: U.S. Census Bureau, American Community Survey, LSA

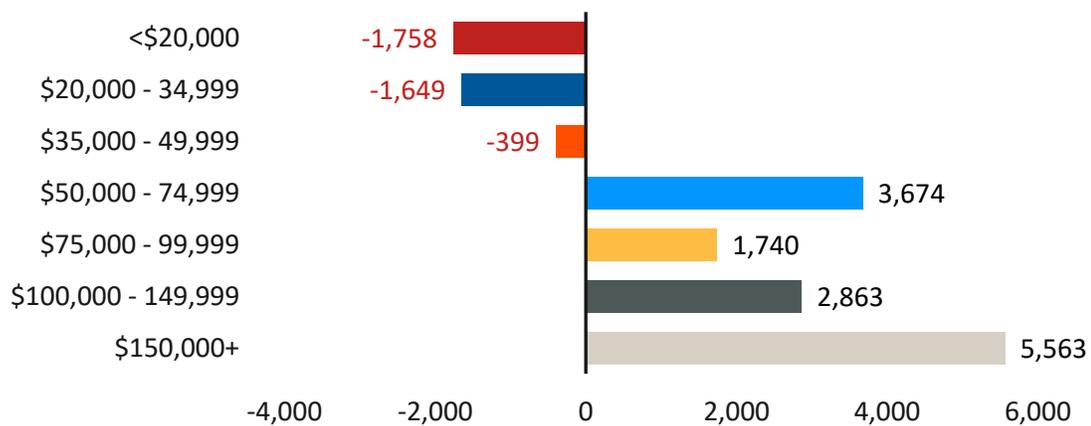
with incomes under \$50,000. For example, the number of households with incomes of \$150,000 or higher has more than doubled (119%) between 2012 and 2017. These high-income households account for more than half (55%) of the total household growth during this time period and now make up 12% of all households in the County. During the same time period, the number of households with incomes below \$20,000 declined by 13%.

Figure 11. Households by Households Income, Sussex, Kent and New Castle Counties, 2017



Source: U.S. Census Bureau, American Community Survey, LSA

Figure 12. Change in Number of Households by Household Income, Sussex County, 2012-2017



Source: U.S. Census Bureau, American Community Survey, LSA

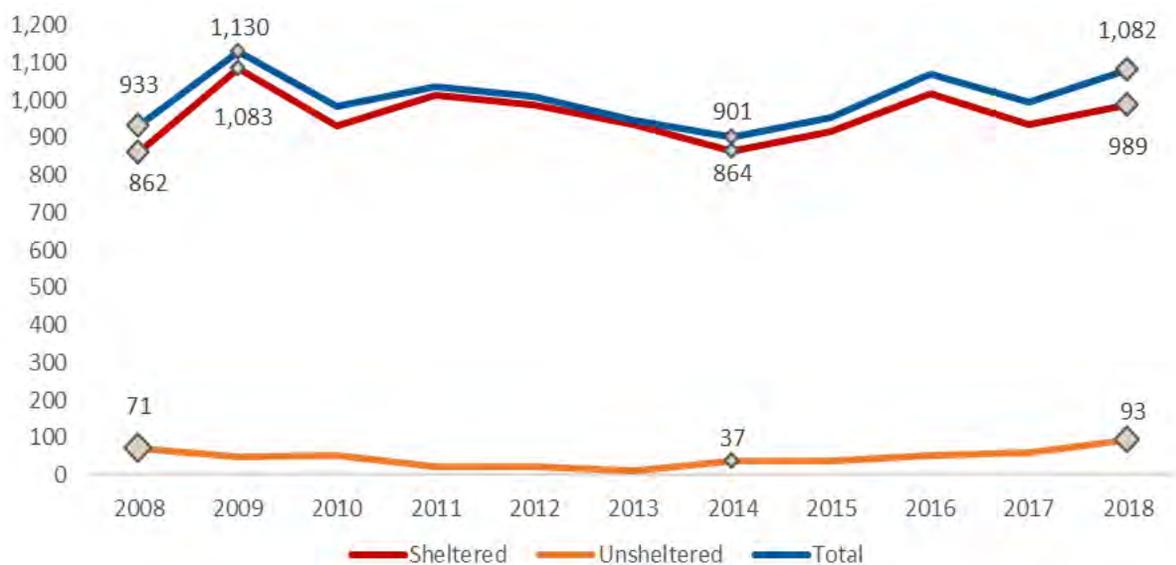
This boom in higher-income households can have a significant impact on the local housing market, with the potential to raise home and rental unit prices over time, leading to growing affordability concerns for low- and moderate-income households. Despite the increasing number of high-income households, households making under \$20,000 (approximately 11,571 households) still comprise a significant share of Sussex County households (13%).

Over the last several years, median household income in Eastern Sussex County grew faster than it did in Western Sussex County, contributing to greater income inequality across the County. In 2012, median income in Eastern Sussex County was \$56,220, \$7,534 higher than in Western Sussex County (\$48,686). Between 2012 and 2017, median income in Eastern Sussex County increased 13% to \$63,305 while Western Sussex’s median income increased by just 7% to \$52,237.² Although household incomes grew on both sides of the County, household incomes in Eastern Sussex are growing at a much faster rate, contributing to a higher household income gap of \$11,068.

Homeless Population

According to 2018 Point-In-Time Count conducted by Housing Alliance Delaware, over 1,000 individuals and families across the state are considered homeless, including 989 who are living in emergency shelter or transitional housing, and another 93 who are unsheltered living in places not meant for human habitation (i.e. sleeping in the streets or in cars). About one out of every three (35%) households have children and 65 adults (6% of all homeless in Delaware) are Veterans.³

Figure 13. Homeless Population Trends in Delaware, 2008 - 2018



Source: HUD Continuum of Care Homeless Assistance Programs, 2008-2018 Homeless Populations and Subpopulations

The State provides temporary supports for individuals and families experiencing homelessness, including year-round emergency shelter, weather-related emergency shelter,⁴ emergency overflow vouchers for motels, and medium-term stay transitional housing, where a person experiencing homelessness can stay

² U.S Census Bureau. 5-year American Community Survey.

³ Housing Alliance Delaware (2018). *The State of Housing and Homelessness in the First State 2018*. Wilmington, DE.

⁴ Code Purple Sanctuaries in Delaware provide low/no barrier access to shelter when the temperature drops below a locally determined level.

for up to 24 months. As of 2018, the State had 818 emergency beds available, including 629 year-round, 18 seasonal, and 171 overflow vouchers. In addition, the State had 488 transitional beds.⁵

According to Housing Alliance Delaware, 118 homeless live within Sussex County compared to 247 who live in Kent County and 717 who live in New Castle County. Homelessness in Delaware has increased by 20% since 2014, steadily increasing to a number nearly as high as its 10-year peak during the recession in 2009. Sussex County's homeless population, however, has hovered between 114 and 118 between 2015 and 2018, with an increase to 137 in 2017.

Housing Alliance Delaware, the State's Continuum of Care (CoC) lead agency, tracks homelessness and reports the information to the US. Department of Housing and Urban Development (HUD) as part of the federal CoC Homeless Assistance Program.

Homelessness data are typically obtained through two methods; as a point-in-time (PIT) count at the end of January each year, and a housing-inventory-count (HIC) which is a point-in-time inventory of beds/units that are in use in homeless shelters. While these methods are nationally accepted and allows communities to track the occurrence of homelessness over time, this is one snapshot during one of the coldest days of the year.

This methodology does not capture the full extent of homelessness in communities, particularly in Sussex County, which has a higher than average seasonal population and attracts more people during the warmer months. It also does not count individuals and families who may be precariously housed and are at-risk of homelessness – very low-income populations, households paying a disproportionate amount of income towards housing costs, frequent moving for economic reasons, living in substandard housing or overcrowded conditions, or “couch surfing.” Any number of catalyzing events - a healthcare crisis, domestic violence, or job loss- can land residents at the shelter door. As a result, the homelessness situation in Sussex County is much broader than the PIT count suggests.

Employment

In 2018, approximately 18% of jobs in the State of Delaware were in Sussex County. This is a slightly higher share than in Kent County (15%) but a far lesser share than New Castle County (65%). There has been fairly steady job growth in the County over the past few years (averaging between 2,400 to 2,800 new jobs each year); however, the employment growth is largely attributable to sectors with relatively lower average wages. More workers live in Sussex County than there are jobs – approximately 40% of the local workforce leaves the County for employment opportunities elsewhere, indicating a slight imbalance between jobs and the residents in the labor market. There are nearly 82,000 jobs located in Sussex County and approximately 18,000 employees commute into Sussex County from other places.

Jobs

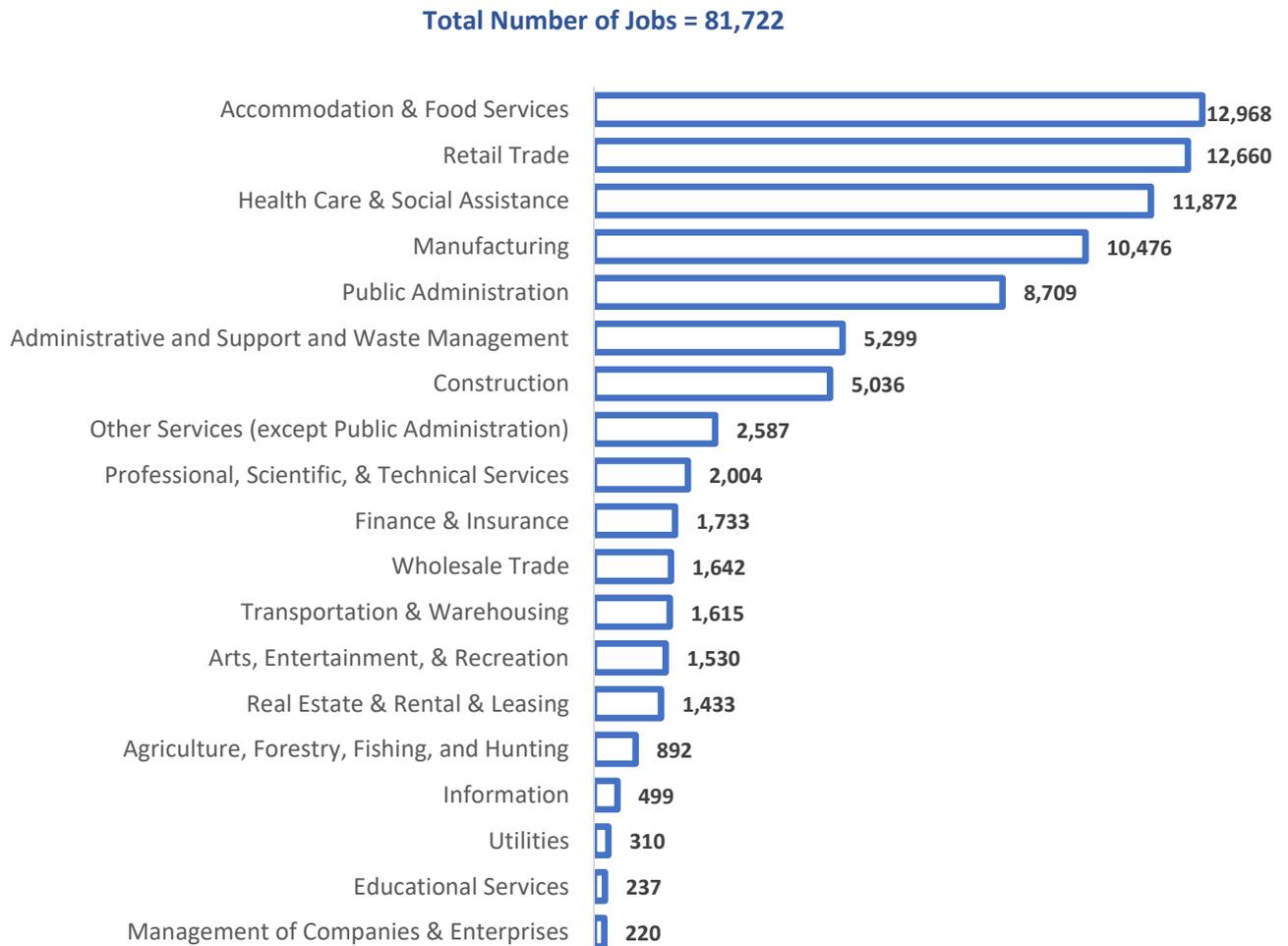
As of 2018, Sussex County had an estimated 81,722 jobs, of which nearly 60% are in one of four main industries: Retail Trade (16%), Accommodations and Food Services (15%), Health Care and Social Assistance (15%) and Manufacturing (13%), which includes poultry processing and other jobs related to Sussex County's agriculture industry. These four industries have consistently made up the largest

⁵ U.S. Department of Housing and Urban Development (2018). *HUD 2018 Continuum of Care Homeless Assistance Programs, Housing Inventory Count Report*. Washington, DC.

portions of Sussex County’s job base since the early 2000s, with Manufacturing and Retail Trade accounting for slightly less over the years, and Health Care and Accommodation and Food Services making up slightly more year after year.

Sussex County’s economy has seen a resurgence since the economic recession when the County lost approximately 2,000 jobs between 2007 and 2012. Since 2012, the number of jobs has increased by about 3% annually (12,119 jobs), which is about 40% higher than both New Castle and Kent counties during the same period of time. Sussex County not only gained back the number of jobs lost during the economic downturn, but increased its employment base by 14% since 2007, more than twice as much as growth experienced statewide (6%).

Figure 14. Total Number of Jobs by Industry, Sussex County, 2018



Source: Delaware Department of Labor, Quarterly Census of Employment and Wages; U.S. Bureau of Labor Statistics (Agriculture Jobs); LSA

More than half of the job growth, however, has largely been isolated to a handful of industries that, on average, have lower wages. Sussex County gained more Accommodation and Food Services jobs than any other industry (29% of the job growth). An estimated 11% of job growth has been in the Retail Trade industry. When the economy is performing well, as it has in the last few years, more people spend more of their discretionary income on dining out, shopping, and travelling. Both industries are particularly volatile, growing and declining with the rise and fall of the market.

Most other jobs added in Sussex County were in industries that generally support the growing population, including Administrative and Support and Waste Management (21% of the job growth), Construction (12% of the job growth), and Health Care and Social Assistance (17% of the job growth). As an industry, Health Care and Social Assistance has higher average wages than the County average, though there are many low-wage home health aides, administrative support staff, and others in the field, who earn less than the County average wages.

Similarly, wages among aeronautical and pharmaceutical companies skew the average Manufacturing wage data. Manufacturing jobs that support Sussex County's agricultural industry (i.e. food processing) earn lower wages. For many in the poultry industry, wages are only slightly higher than the State's minimum wage.

Wages

The 2018 average wage in Sussex County was \$40,509, up by 18% since 2012. While wages have risen and the average wage is currently higher than the national average (\$32,397)⁶, Sussex County's average wage is lower than both Kent (\$43,809) and New Castle (\$63,917) counties, and is 40% lower than the State's average wage (\$56,842). Workers in lower-wage jobs in Retail Trade and Accommodation and Food Services earn 40-50% less than the average worker in the County, and workers in these two sectors represent nearly one-third of the workforce. This lower-wage segment of the economy is 10% higher in Sussex County than in the State as a whole. Two other main industries in the County--Manufacturing and Health Care and Social Assistance—however, earn higher than the County's average wage, at 12% and 33% more, respectively.

Wage levels are an important indicator of housing demand from the County's workforce if they opt to both live and work in Sussex County. The wage data suggests that roughly 37% of the workers in Sussex County could only afford rents between \$500 and \$750 each month (if they were the only person in their household working). If workers in Sussex County were looking to be homebuyers, the wage data suggests roughly one out of every three employees could afford sales price ranges between \$140,000 and \$200,000 (if they had two workers in their household in the same industry). These are hypothetical assumptions, and can be applied in a variety of ways, but provide an overall approximation of housing price and rent ranges that are affordable to many Sussex County workers.

⁶ U.S. Census, 2017 1 Yr. American Community Survey

Table 1. Employment/Affordability Analysis, Sussex County

| | No. Jobs | Avg. Wage | Affordable Rent Level* | Affordable Homeownership Level** |
|--|---------------|-----------------|------------------------|----------------------------------|
| Accommodation & Food Services | 12,968 | \$20,582 | \$515 | \$144,074 |
| Retail Trade | 12,660 | \$28,025 | \$701 | \$196,175 |
| Health Care & Social Assistance | 11,872 | \$54,092 | \$1,352 | \$378,644 |
| Manufacturing | 10,476 | \$45,242 | \$1,131 | \$316,694 |
| Public Administration*** | 8,709 | \$48,101 | \$1,203 | \$336,707 |
| Administrative and Support and Waste Management | 5,299 | \$32,956 | \$824 | \$230,692 |
| Construction | 5,036 | \$49,107 | \$1,228 | \$343,749 |
| Other Services (except Public Administration) **** | 2,587 | \$30,023 | \$751 | \$210,161 |
| Professional, Scientific, & Technical Services | 2,004 | \$67,645 | \$1,691 | \$473,515 |
| Finance & Insurance | 1,733 | \$63,527 | \$1,588 | \$444,689 |
| Wholesale Trade | 1,642 | \$62,363 | \$1,559 | \$436,541 |
| Transportation & Warehousing | 1,615 | \$42,074 | \$1,052 | \$294,518 |
| Arts, Entertainment, & Recreation | 1,530 | \$22,127 | \$553 | \$154,889 |
| Real Estate & Rental & Leasing | 1,433 | \$43,871 | \$1,097 | \$307,097 |
| Agriculture, Forestry, Fishing, and Hunting | 892 | \$35,253 | \$881 | \$246,771 |
| Information | 499 | \$64,884 | \$1,622 | \$454,188 |
| Utilities | 310 | \$105,591 | \$2,640 | \$739,137 |
| Educational Services | 237 | \$27,866 | \$697 | \$195,062 |
| Management of Companies & Enterprises | 220 | \$156,318 | \$3,908 | \$1,094,226 |
| Total | 81,722 | \$40,509 | \$1,013 | \$283,563 |

Sources: Delaware Department of Labor, Quarterly Census of Employment & Wages, U.S. Bureau of Labor Statistics, LSA

*Rent affordable to one worker at 30% of Gross Salary

**Home affordable to two workers at 3.5 times gross pay

***Includes local, state, and federal employees, including teachers and first responders

****Includes services not provided under the Bureau of Labor Statistics classification system, including funeral care, pet care, dry cleaning and laundry, temporary parking services, advocacy work, dating services, and machinery repair, among others.

Commuting Patterns

Based on 2015 On the Map data from the U.S. Census Bureau, nearly three out of four jobs (72%) in Sussex County are held by residents of the County, with the balance (approximately 18,000 workers) held by in-commuters. About 10% of workers commute from Kent County, 4% commute from New Castle County, 4% commute from Wicomico County, and 10% commute from various other locations outside of the County.

Among Sussex County’s working residents, approximately 40% commute each day to other jurisdictions, including Kent (12%), Wicomico (9%), and New Castle (5%) Counties, and 13% commute to various other locations.

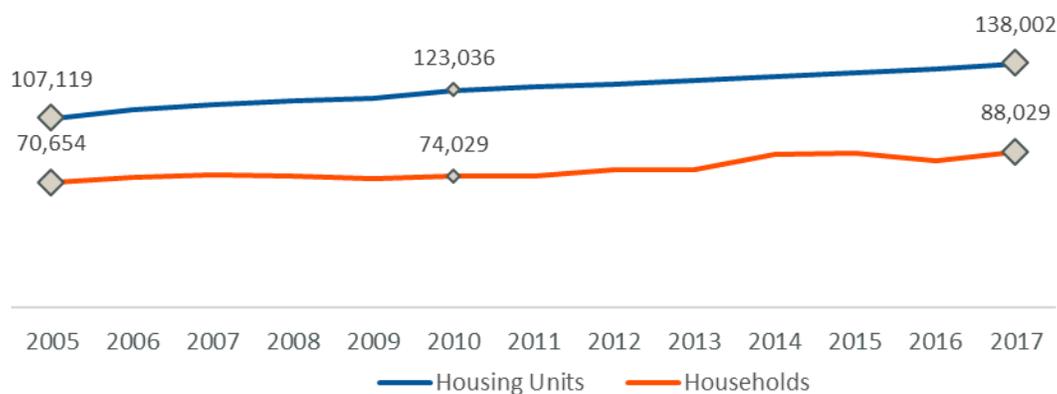
Within the County, there are key employment hubs – Seaford, Georgetown, Milford, Lewes, Rehoboth Beach, Millsboro, and Selbyville- to which residents are commuting for work. No one town has a significant portion of jobs, and not all jobs within the towns are taken by residents within the municipal boundaries. While most employees of Sussex County also live there, this data suggests significant cross-commuting among Sussex County residents who also work in the County. Given the large and growing

number of jobs in the tourism-supporting industries that are located near the beach, there is likely a significant number of Western to Eastern commutes occurring that will continue to increase as these industries grow.

Housing Market Conditions

According to the U.S. Census Bureau, there were an estimated 138,002 housing units in Sussex County in 2017. In the seven years between 2010 and 2017, the number of housing units increased by 15,000, accounting for 56% of the housing unit growth in the State. More than one-third (49,980 housing units) of the housing stock, however, is “vacant” without a regular, year-round occupant.⁷ This is a much higher rate than both statewide (17%) and nationwide (5%).

Figure 15. Households and Housing Units, Sussex County, 2005 to 2017



Source: U.S. Census Bureau, American Community Survey, LSA

The vast majority (84%) of vacant units are seasonal – units that are “intended for occupancy only during certain seasons of the year.” Seasonal vacancy has increased over the last five years, with an increase of over 4,200 units, up by 5% since 2012, and coincides with a reduction in empty for-sale and for-rent units on the market. Over 40,000 seasonal units are located in Eastern Sussex, close to the beach, retail, and other outdoor attractions.⁸ Of the 227 units that are vacant in Western Sussex, just 25% of are for seasonal use (56 units).

Another 10% of vacancy is related to “other vacancy” – units that may be vacated for a variety of reasons, but oftentimes it is related to homes in such disrepair that they may be uninhabitable or undergoing renovation. The number of “other vacancy” units increased by an estimated 729 units since 2012. More than half of all “other vacancy” is located in Western Sussex, and accounts for more than 61% of vacant units in Western Sussex (139 units).⁹

⁷ “Occupied Housing Units” with a year-round homeowner or renter and “households” are used interchangeably.

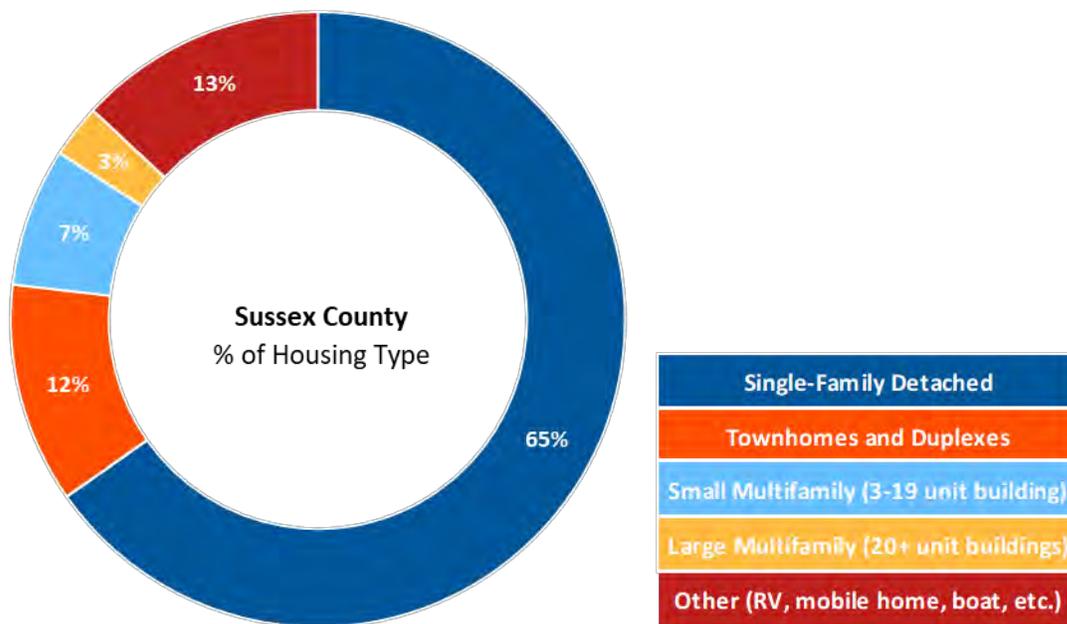
⁸ U.S. Census Bureau, 5-year American Community Survey. Census-tract-level data is not available in the 1-Year dataset.

⁹ U.S. Census Bureau, 5-year American Community Survey.

Housing Types

The vast majority of the housing stock in Sussex County is single-family homes, of which 65% are detached and another 12% are attached townhomes or duplexes. Single-family homes account for the greatest growth of net new units over the last five years, and both homeowners and renters are more likely to live in detached, single-family homes than any other form of housing. In the last few years, that number, however, has declined for renters by an estimated 1,345 households, which coincides with both an increasing seasonal vacancy and increasing homeownership rate during the same period of time. Given these trends, single-family homes that were once long-term rentals may have been sold and are now occupied by new homeowners or they may have been converted to short-term, seasonal housing.

Figure 16. Housing Units by Housing Type, Sussex County, 2017

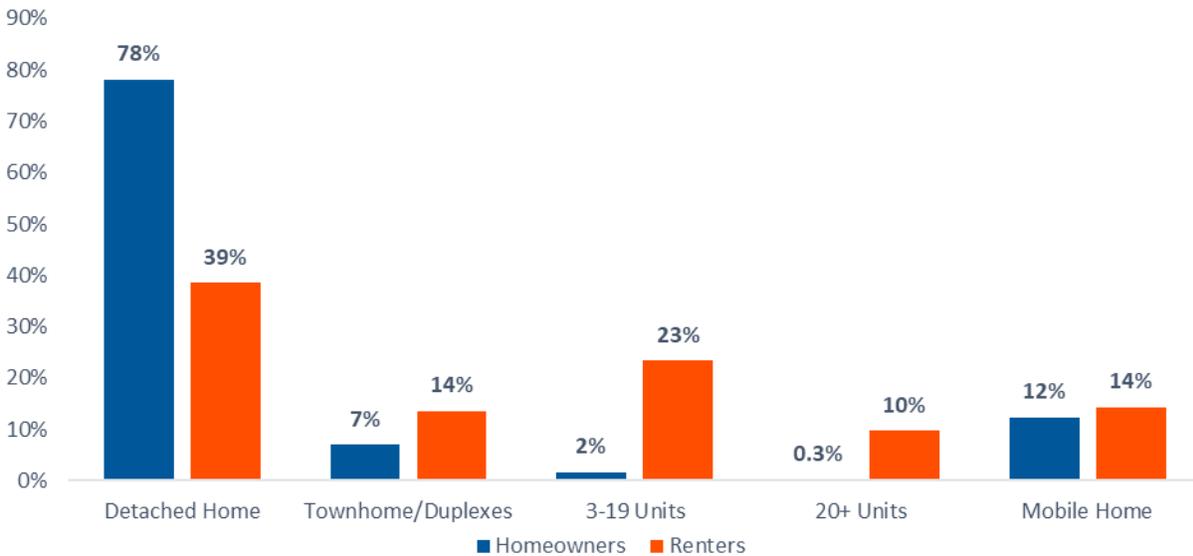


Source: U.S. Census Bureau, American Community Survey, LSA

Similarly, more homeowners are occupying units in small, multi-family buildings (buildings with less than 20 units) than they were a few years ago, while the number of renters living in multifamily housing declined. Condo owners who rented their homes to longer-term tenants may now be renting for seasonal use, which coincides with the increase in seasonally vacant housing. Or, they may have sold their home, which is now occupied by a homeowner. Still, about one in four renters live in small multi-family buildings, and they are more likely to live there than homeowners.

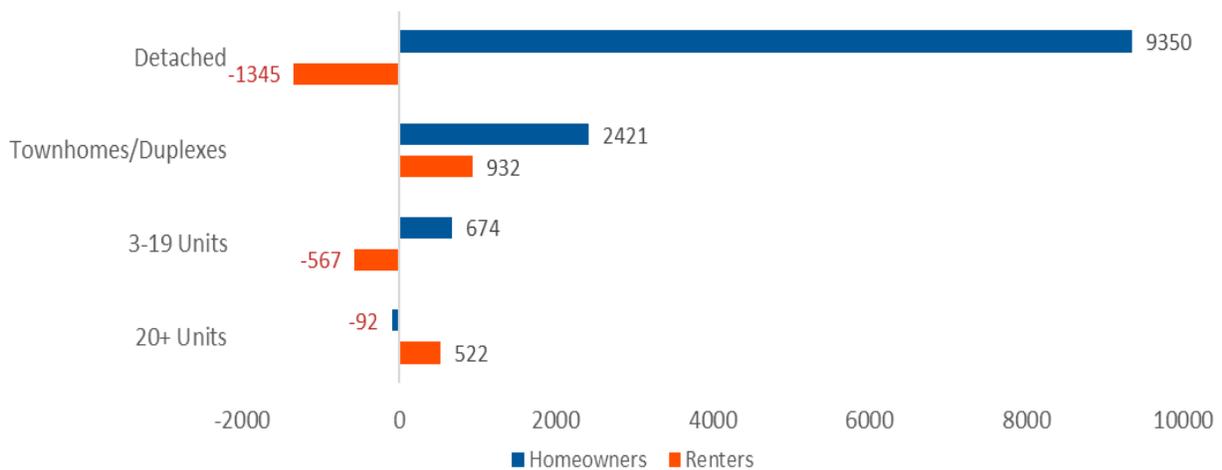
Mobile or manufactured homes represent 12% of the housing stock in Sussex County and can be a low-cost option for households with modest means. Manufactured housing, however, is the only form of housing that has consistently been in decline, both in absolute numbers and as a share in the total housing stock.

Figure 17. Housing Units by Occupied Housing Type and Tenure, Sussex County, 2017



Note: 'Other' housing (i.e. Boat, RV, Van) was not reported as it is not statistically significant for either homeowners or renters.
 Source: U.S. Census Bureau, American Community Survey, LSA

Figure 18. Change in the Occupied Housing Types, Sussex County, 2012 to 2017

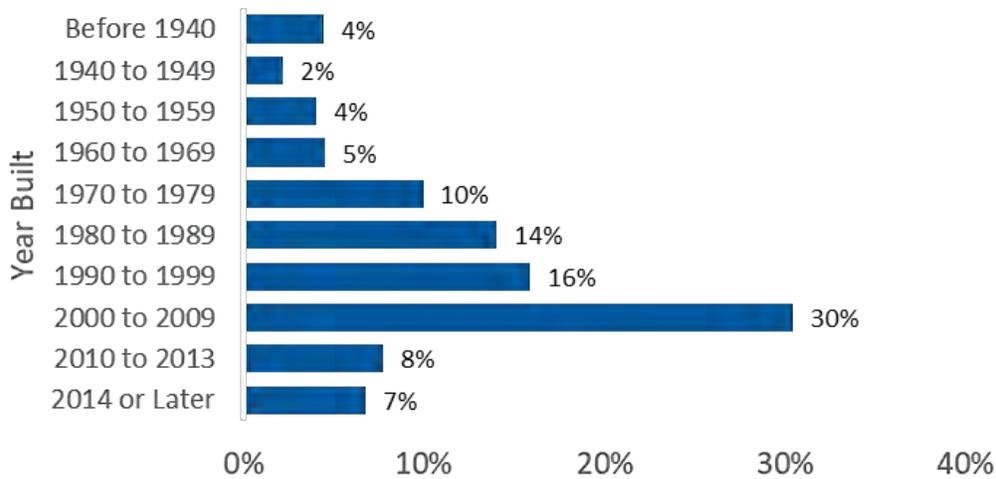


Source: U.S. Census Bureau, American Community Survey, LSA
 *Manufactured housing was omitted due to its high margin of error.

Age of Structure

Sussex County's housing stock is relatively new. Nearly half of the housing stock in the County was built after the turn of the 21st century, accounting for 51% of all housing stock built in Delaware since 2000. Construction was particularly productive between 2000 and 2009, when 30% of all homes in the County were built to accommodate the 25% growth in population during this same time period. About 20% of the County's housing stock was built between 1980 and 2000 and the rest (25%) was built prior to 1980.

Figure 19. Housing Units by Year Built, Sussex County, 2017



Source: U.S. Census Bureau, American Community Survey, LSA

Housing Quality

Although Sussex County’s housing stock is relatively new, many homes are in need of significant repair. Across the County, there are more than 4,000 occupied substandard housing units (about 5% of occupied housing), defined as “homes that are occupied but in unlivable conditions or homes that are occupied and in disrepair.”¹⁰ Among these units, 3,209 are estimated to be owner-occupied and 888 are estimated to be renter-occupied. In addition, the Community Development and Housing Department reports over 1,000 households on a waiting list for rehabilitation assistance.¹¹

As part of a targeted field study conducted by the Community Development and Housing Department across certain submarkets, Sussex County assessed the exterior of properties across 14 communities. They evaluated whether the property appeared in good condition, in need of some repair, in need of major repairs, or uninhabitable. An estimated 216 homes (37%) were in need of major repairs (e.g. new roof, new siding, new windows, or some structural work). According to a community survey as part of the same study, residents reported “Home Repair” as a top priority, followed by “Water Quality/Testing.”¹²

Rental Market

Bucking a trend in the rest of the state and region, the number of rental units in Sussex County has declined in recent years. As of 2017, there were an estimated 15,893 occupied rental units in the County, which was 2,047 fewer than in 2012. This decline coincides with the increase in the homeownership rate from 77% to 82% and a reduction in rental vacancy from 1,762 to 761 units during

¹⁰ Housing Chapter, 2018 Sussex County Comprehensive Plan

¹¹ <https://sussexcountyde.gov/community-development-block-grant-progress>

¹² Sussex County (2016). *Impacted Communities Study*. Communities surveyed include Cedar Creek, Concord, Cool Spring, Coverdale, Diamond Acres, Dog Patch, Greentop, Lucas Development, Mount Joy, New Hope/S. Old State Road, Pinetown, Polly Branch, Possum Point, and West Rehoboth.

the same period of time. It is likely that owners who had previously been renting their single-family home sold the property, or the owner may have converted the long-term rental into short-term, seasonal housing.

Table 2. Median and Affordable Rents by Bedroom Size

| | Income Limit: 1 person/Family of 4 | Efficiency | 1 BR | 2 BR | 3 BR |
|---------------------------------|---------------------------------------|------------|-------|---------|---------|
| 2017 Median Gross Rent | | \$539 | \$575 | \$1,024 | \$1,055 |
| Maximum Allowable Rents* | | | | | |
| 60% AMI | \$30,300/ \$43,260 | \$757 | \$811 | \$973 | \$1,125 |
| 50% AMI | \$25,250/ \$36,050 | \$637 | \$683 | \$820 | \$946 |
| 30% AMI | \$15,150/ \$21,630 | \$382 | \$409 | \$492 | \$568 |

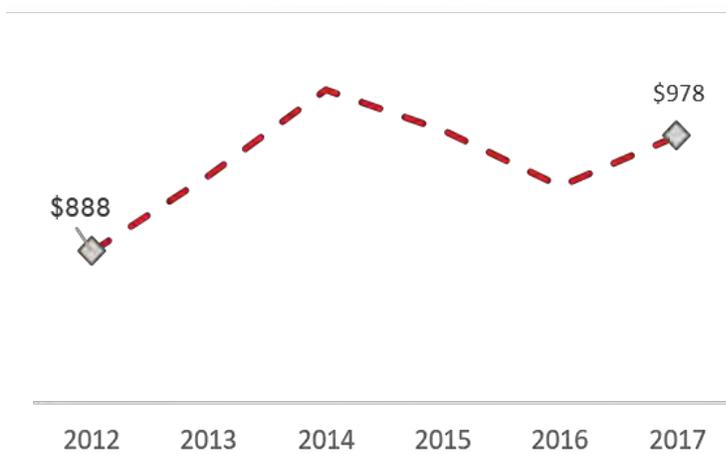
Source: Median Rent - 2017 1-year American Community Survey (Table B25031). Affordable Rent/Income- Novogradac Rent and Income Limit Calculator, 2019

*Under Low Income Housing Tax Credit Program

Note: Current dollars are NOT adjusted for inflation

Under the Low Income Housing Tax Credit program, landlords are required to rent units to households that earn 60% of the area median income (AMI) or less. Maximum allowable rents are set by the federal government based upon household size and income. Median gross rent is not much different than maximum allowable rents restricted to lower-income households, which suggests that the market is delivering many rental units consistent with what would be affordable to households earning 60% AMI.

Figure 20. Sussex County Median Monthly Rent, 2012- 2017



Source: U.S. Census Bureau, American Community Survey, LSA

Note: Median rents are in current dollars, not adjusted for inflation.

In most cases, median rents are slightly less than rents allowable under this program. Only at 30% AMI is there a significant gap in the market countywide.

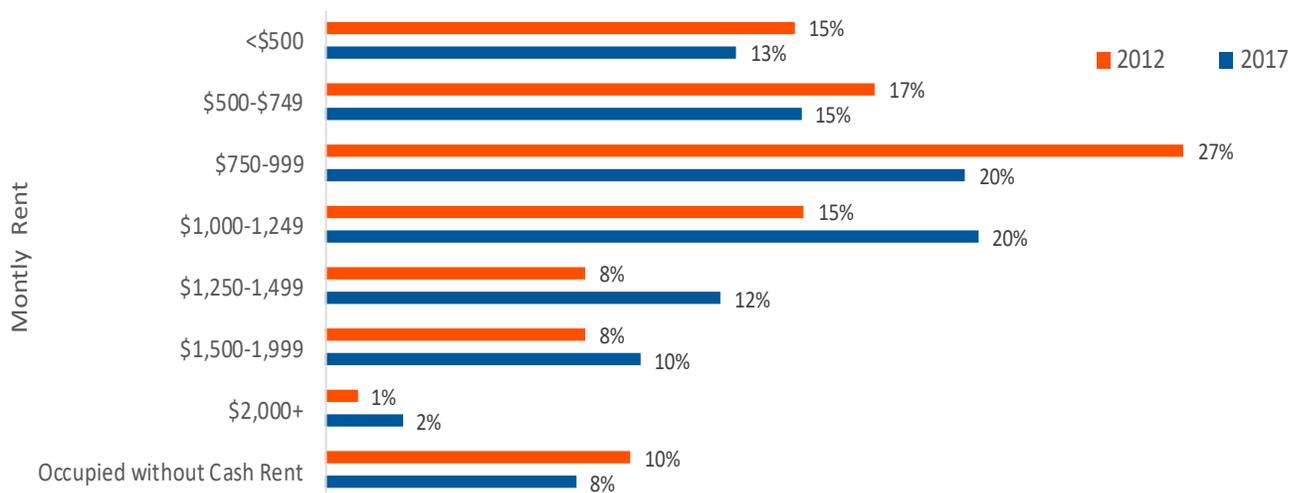
Rents in the County have risen 10% since 2012. During the same time, median income among renters increased by 18% (from \$30,257 in 2012 to \$35,999 in 2017). The influx of higher-income residents will continue to put upward pressure on market rents.

Following a national trend, the number of low-cost rental units with monthly gross rent of less than \$750 declined between 2012 and 2017. In 2012, 32% of all rental units rented for less than \$750; by 2017, that share had decreased to 28%. At the same time, the County gained more than 300 rental units with a

monthly gross rent of at least \$1,500. In 2017, an estimated 12% of rental units rented for \$1,500 or more, up from 9% in 2012.

Rentals in Eastern Sussex County are more expensive than in Western Sussex County, but rents have risen more quickly since 2012 in Western Sussex. In 2017, the median rent in Eastern Sussex County was \$1,075, up 1% since 2012. In Western Sussex County, the 2017 median rent was \$861, up 6% since 2012.¹³

Figure 20. Change in Rental Units by Rent, Sussex County, 2012 to 2017



Source: U.S. Census Bureau, American Community Survey, LSA

Subsidized Housing

Some lower-cost rental units have been created in Sussex County through federal public subsidy programs. According to the National Housing Preservation Database, 3,165 rental units (across 78 properties) receive federal assistance.¹⁴ These units represent 20% of the total occupied rental stock in Sussex County and 42% of the lower-rent units under \$1,000. More than half (56%) of subsidized rental units are located in Western Sussex County, including 44% located in one of two jurisdictions: Seaford and Laurel.

In exchange for public assistance, owners agree to rent units to households with low incomes and to charge rents that are no more than a specified amount. Rent restrictions are calculated annually by the U.S. Department of Housing and Urban Development based off of an area’s median income and household size. Owners must comply with affordability requirements that can last up to 30 years, or more in some cases. Once the affordability period is over, owners may convert their properties to market-rate units.

¹³ U.S. Census Bureau. 5-year American Community Survey, LSA

¹⁴ Most properties are funded using the Low Income Housing Tax Credit, Department of Housing and Urban Development’s Home Investment Partnership Program, or Section 8 program, as well as programs from the United States Department of Agriculture. In most cases, properties use a combination of funding sources as part of their financing structure.

Table 3. Percentage of Subsidized Housing in Sussex County by Jurisdictions

| Jurisdiction | Units | % of Subsidized Housing | Jurisdiction | Units | % of Subsidized Units |
|--------------|-------|-------------------------|--------------|-------|-----------------------|
| Seaford | 701 | 22.1% | Milton | 150 | 4.7% |
| Laurel | 698 | 22.1% | Delmar | 136 | 4.3% |
| Millsboro | 384 | 12.1% | Rehoboth | 105 | 3.3% |
| Lewes | 256 | 8.1% | Selbyville | 75 | 2.4% |
| Georgetown | 241 | 7.6% | Blades | 33 | 1.0% |
| Bridgeville | 176 | 5.6% | Greenwood | 28 | 0.9% |
| Milford | 162 | 5.1% | Harbeson | 20 | 0.6% |

Source: National Housing Preservation Database, Accessed 5/10/2019

Ownership among subsidized units in Sussex County is mixed – some property owners are mission-oriented owners and will likely pursue financing strategies leading up to their expiring contract that will preserve these low-rent units as long-term affordable housing. Others are profit-driven investors and owners who may be incentivized, particularly in submarkets experiencing upward market pressure, to increase rents, convert units to condos unaffordable to tenants, or sell the property.

Most units will remain affordable in the next decade; however, 18% of subsidized rental units in the County will reach the end of their subsidy contracts and affordability restrictions in the next ten years, including 256 units within five years.

*Table 4. Subsidized Units by Expiring Affordability**

| Prior to 2025 | 2025-2029 | 2030-2039 | 2040 and Later | No Expiration** | Total |
|---------------|-----------|-----------|----------------|-----------------|-------|
| 256 | 303 | 1,598 | 958 | 50 | 3,165 |
| 8% | 10% | 50% | 30% | 2% | 100% |

Source: National Housing Preservation Database, Accessed 5/10/2019

*Latest expiration date used where multiple subsidies exist

**Public Housing managed by Delaware State Housing Authority

Evictions

In 2016, 848 renters in Sussex County were evicted from their homes. Evictions are landlord-initiated, involuntary moves towards renters that can happen for a number of reasons, including damage to the rental property, having more people living in the unit than is allowable, or breaks rules stated in the tenant’s lease agreement. Most evictions, however, happen when tenants cannot or do not pay their rent.¹⁵

Sussex County’s eviction rate is lower than both Kent County (6.05%) and New Castle County (5.07%), but greater than it is nationwide (2.34%). After a spike to nearly 7% during the recession in 2009,

¹⁵ Eviction Lab (2019). Understanding Eviction in Kent County, Sussex County, and New Castle County, Delaware. Princeton University: Princeton, New Jersey.

eviction rates have declined year after year to 4.25%, though that decrease coincides with a decline in the number of renter-occupied units.

Eviction filings – an attempt to evict tenants– are much higher. In 2016 alone, nearly 3,000 evictions were filed in Sussex County.¹⁶ Since a spike in filings in 2010, the eviction filing rate has remained over 15%. When tenants are informed of their hearings, some voluntarily vacate the units before their trial date, even if the judge may have ruled in their favor. If the tenant shows up to court, they are oftentimes alone and not represented by counsel.

These filings, however, only represent a formal court-ordered eviction process. Informal evictions – a landlord telling a family to leave, changing locks, or threatening to call the police or immigration- would not be reflected in the formal eviction filing process.

Evictions can have devastating, ripple effects to families. Legal evictions that come with a court record can prevent families from relocating to safe, decent housing since many landlords screen for recent evictions. Research from the Eviction Lab at Princeton University has shown that evictions can lead to job loss, cause children to change schools, impact a person’s mental health, and can be a contributor of poverty. Research also suggests that low-income women, particularly minorities and victims and families of domestic violence, are at higher risk for eviction. This type of family instability can have broader communitywide impacts, including more challenges in public schools, greater demand for public services, more homelessness, and less community sustainability.

For-Sale Market

According to a review of listings on Zillow, there are approximately 3,600 homes for-sale in Sussex County at the beginning of May 2019. Nearly 80% of homes for sale are single-family detached homes followed by townhomes (10%), condos/apartments (10%) and 60 manufactured homes. One out of five homes listed are priced at least \$500,000, including 213 that are listed over \$1,000,000. The vast majority of these higher-priced homes are concentrated in the coastal towns of Lewes, Rehoboth Beach, Bethany Beach, and Fenwick Island.

About one-third of the homes listed for sale were under \$300,000, including 13% under \$200,000. Lower-cost homes currently on the market were scattered across the County, mostly just east of Route 113, as well as some concentrated in communities surrounding Seaford and Laurel.

Table 5. Home Listings as of May 2019, Sussex County

| House Type | < \$200k | \$200k - \$299K | \$300k- \$399k | \$400k-\$499k | \$500K + | Total |
|------------------------|------------|-----------------|----------------|---------------|------------|-------------|
| Single-Family Detached | 354 | 561 | 832 | 425 | 643 | 2,815 |
| Townhome | 45 | 98 | 144 | 38 | 43 | 368 |
| Condo/apartment | 31 | 127 | 82 | 44 | 79 | 363 |
| Manufactured Home | 53 | 6 | - | - | 1 | 60 |
| Total | 483 | 792 | 1,058 | 507 | 766 | 3,606 |
| % of Total | 13% | 22% | 29% | 14% | 21% | 100% |

Source: Zillow.com, accessed 5/6/2019

¹⁶ It is possible that there were multiple filings for one unit.

While the for-sale market is spread across multiple price points, many working households in Sussex County do not earn enough to buy a home from this available offering. A household with two full-time workers earning the median wage in sectors such as Farming, Accommodation and Food Services, Retail Trade, Educational Services, or Arts, Entertainment, and Recreation have household incomes that could allow them to purchase a home priced less than \$200,000. About a third (34%) of the employment base in Sussex County have household incomes in this range, compared to 13% of the homes listed for sale. Only about 8% of the employment base could afford homes higher than \$400,000; homes in this price range represent 35% of the homes currently listed for sale.

While these listings are a point-in-time snapshot of the for-sale market, data from the U.S. Census Bureau show the median home value increasing (from \$226,100 in 2012 to \$276,800 in 2017) and the availability of for-sale housing affordable to the County’s workforce has been declining in the last several years. In 2012, homes valued below \$300,000 were 68% of the total owner-occupied units, 12% higher than they were in 2017. During the same period of time, homes valued over \$400,000 increased by 9% and now make up about one in every four (26%) homes.

The increase in home values has been driven largely by the increase in new housing production in Eastern Sussex County. Eastern Sussex’s median home values rose 3% from \$302,343 in 2012 to \$312,029. In Western Sussex County, home values declined 6% since 2012 to \$195,969.¹⁷

New Construction

There were 19,233 new housing units in Sussex County¹⁸ approved by building permits between 2012 and 2018.¹⁹ This growth represents half of the State’s new housing units approved during this time period. Between 2012 and 2016, total building permits averaged 2,400 units per year, which is about 400 units higher than the annual average household growth during the same time period. In 2017, the unit count rose to over 3,000, and in 2018 jumped over 4,055 units approved. Roughly nine out of every 10 units (89%) are single-family homes, including townhomes.

New construction since 2012 has primarily been at mid-range price points between \$300,000 and \$400,000, based off of a review of homes currently listed on the market. One-third of homes built since 2012 are currently selling over \$400,000, out of reach for many working households in Sussex County. Just 3% of newer homes listed for sale are priced less than \$200,000.

Table 6. New homes Listed (built 2012 and later) by Sales Price

| Housing Price | Number Units | % For-Sale |
|-----------------------|--------------|-------------|
| < \$200,000 | 44 | 3% |
| \$200,000 - \$299,999 | 374 | 23% |
| \$300,000 - \$399,000 | 685 | 42% |
| \$400,000 - \$499,999 | 316 | 19% |
| \$500,000 + | 216 | 13% |
| Total | 1,635 | 100% |

Source: www.zillow.com, accessed 5/23/2019

¹⁷ U.S. Census Bureau. 5-Year American Community Survey.

¹⁸ Includes both Municipalities and the Unincorporated County

¹⁹ Delaware State Housing Authority, Housing Production Report, Delaware Building Permits, Sussex County Planning and Zoning (CY 2018)

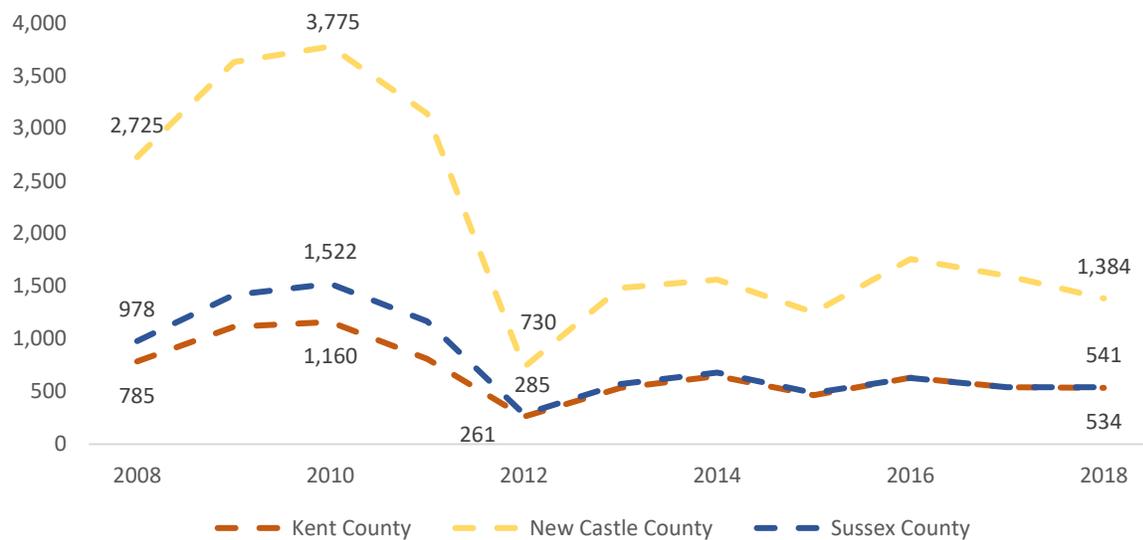
Foreclosures

According to RealtyTrac, the State of Delaware has the third highest foreclosure rate in the country. One out of every 1,249 homes are in some form of the foreclosure process compared to one out of every 2,433 homes nationally. Within the State, Kent County has the most homes in some stage of foreclosure (one in every 869 homes), followed by New Castle County (one in every 1,270 homes), and Sussex County (one in every 1,564 homes).²⁰

After recovering from the recession, the number of foreclosures in Sussex County has generally been rising, and has almost doubled from its lowest point in 2012 (285 foreclosures) to 541 foreclosures reported in 2018.

Foreclosures can have major ripple effects to neighborhoods and communities, including reducing property values, increasing demand for rental housing, increasing physical deterioration, and increased strain on local governments and public assistance. In addition, the financial insecurity from damaged credit and the personal and family stress that comes with housing instability have serious, long-term consequences for households experiencing foreclosure.

Figure 21. Annual Foreclosure Filings by County in Delaware, 2008 to 2018



Source: Delaware State Housing Authority

Housing Affordability

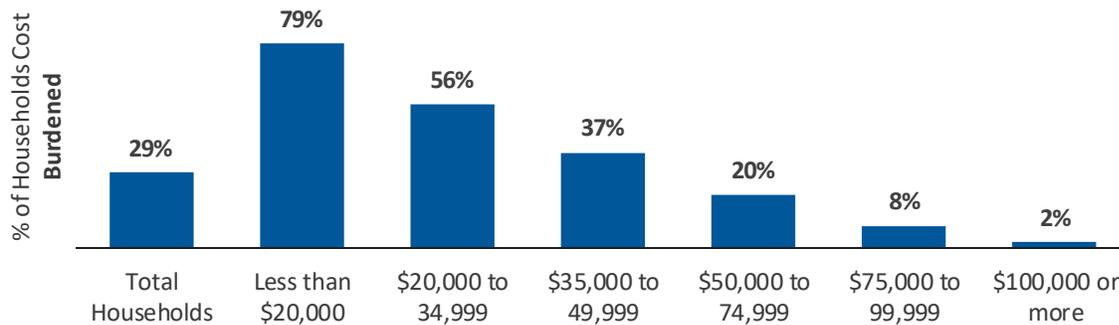
Housing affordability is traditionally measured by comparing home and rent prices to income of residents and workers. Households spending a higher proportion of income towards housing are considered “cost burdened.” For renters, cost burden is calculated as monthly gross rent plus renter-paid utilities as a percentage of monthly household income. For owner households, cost burden is calculated as a percentage of monthly owner costs (payments for mortgages, debts on the property, real estate taxes, insurance on the property, and utilities) as a percentage of monthly household income.

²⁰RealtyTrac (2019). *Foreclosure Rates in the U.S., April 2019* Accessed 5/26/19 from www.realtytrac.com/statsandtrends/foreclosurestrends/

Spending a disproportionately high share of income on housing can leave too little for other necessities like food, health care, and transportation. Households burdened by high housing costs also contribute less towards retirement or education and have little money to spend on non-essential goods and services in their communities, which can dampen the local economy. As a rule of thumb, households that spend between 30% and 50% of their monthly gross income on housing are considered “moderately cost-burdened” and households that spend more than 50% of their monthly income are considered “severely housing cost burdened.”

In 2017, an estimated 24,167 (29% of all households) were cost burdened in Sussex County, including 10,680 households who were severely cost burdened (13% of all households). Households with less resources are more likely to spend a disproportionately high amount of their income towards housing costs. Communities located in and around the coast as well as those West of Seaford have greater cost-burden rates than the overall County rate.

Figure 22. Cost Burdened Households by Household Income, Sussex County, 2017

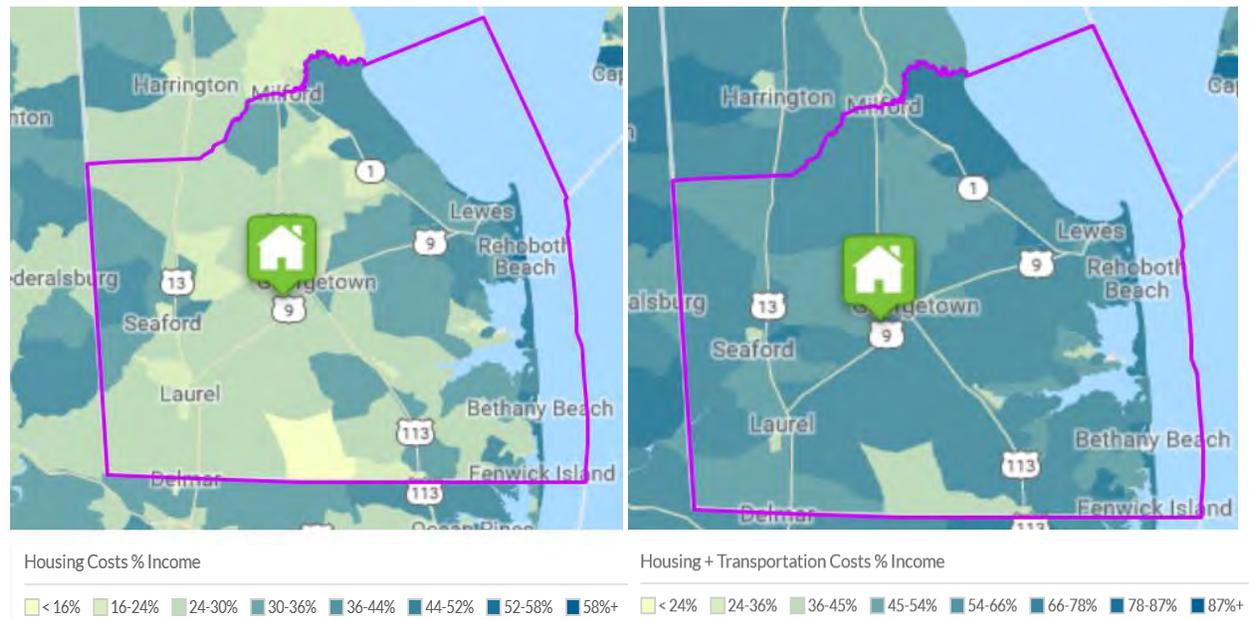


Source: U.S. Census Bureau, American Community Survey, LSA
 Source: U.S. Census Bureau, American Community Survey, LSA

An expanded measure of affordability adds transportation costs, recognizing that when individuals and families move further away from neighborhoods near jobs, services, or other amenities in order to afford housing, the savings on housing costs can be lost in terms of increased transportation costs. According to the Center for Neighborhood Technology (CNT) Housing + Transportation (H+T) Index, when transportation is factored into housing affordability, the typical household in Sussex County spends 56% of their income on housing and transportation. This number is 11 percentage points higher than the industry standard, which assumes households should not spend more than 45% of their income on both housing and transportation.

Transportation costs have a clear impact on overall affordability, particularly in communities located in central and southwestern Sussex County. For example, communities surrounding Laurel and Georgetown have average housing cost-burden rates of less than 30%. Accounting for transportation costs, average cost-burden rates are now between 45% and 54% and, in some communities, between 54% and 66%.

Figure 23. Housing and Housing + Transportation Cost Burden, Sussex County, 2017 Update



Source: Center for Neighborhood Technology, Housing + Transportation Index. Index uses 2015 American Community Survey Data and 2014 Longitudinal Employer Household Dynamics data.

Cost-burden Characteristics

Detailed household data are available for households spending more than 30% of their income on housing costs, but not households spending more than 45% on housing plus transportation. The following analyses highlight some of the characteristics of Sussex County's cost-burdened households.

- **Renters in Sussex County are more likely than homeowners to be cost burdened.** In 2017, 48% (6,891) of all renters in the County were cost burdened, spending over 30% of their income on housing. This includes 3,170 (21% of all renters) who were paying more than 50% of their income towards rent. Cost burden among renters is higher for single parents (52%) and adults living alone (46) than other household types.
- **Hispanic and Black households are more likely than White households to be renters, including cost-burdened renters.** While the homeownership rate among White households (83%) is consistent with the County rate (82%), only about half (51%) of Hispanic households are homeowners and 57% of Black households are homeowners. An estimated 62% of Hispanic renters (1,511 households) are cost burdened and 42% of Black renters (1,638 households) are cost-burdened, compared to 37% of White renters and 38% of renters of all other races.
- **About one out of every four homeowners is cost burdened.** An estimated 18,261 homeowners (26% of all homeowners) are cost-burdened. This number includes 8,297 (12% of all homeowners) who were paying more than 50% of their income towards housing costs.
- **Some homeowners who own their home free and clear are cost burdened.** There are 27,922 homeowners (41% of total homeowners) living without a mortgage; yet, 12% (3,457) pay more than 30% of their income towards housing. This represents 22% of all cost-burdened

homeowners in the County. Homeowners experiencing cost burden without a mortgage likely reflects the cost of lot rent from manufactured housing parks, high Homeowners' Association Fees, and/or property taxes. Another contributor may be high homeowners' insurance policies, given many communities' proximity to the ocean and their risk for flooding or other serious impacts from natural disasters. These cost-burdened homeowners often include individuals and couples living on fixed incomes. Over 80% of all cost-burdened households without a mortgage are older than 55 (2,876 households).

- **Lower-income households face greater challenges finding housing they can afford than middle-income and higher-income households.** Households with incomes less than \$35,000 are more likely to be cost-burdened than higher-income households, and they are particularly more likely to pay more than 50% of their income towards housing. Two out of every three households who earn less than \$35,000 are cost-burdened. Of the 10,680 households who are severely cost-burdened, 85% earn less than \$35,000. Households who earn less than \$35,000 may be single, full-time workers in Accommodation and Food Services and Retail Services (represents over 30% of the employment base), farming, or a senior or person with disabilities living on Social Security.
- **While more money helps, many other working households are still cost burdened.** An estimated 37% of households who earn between \$35,000 and \$50,000 are cost burdened (4,726). This represents about one in five cost-burdened households, including 27% of the households moderately cost burdened paying between 30% - 50% of income towards housing. Households with two income-earners in Poultry Processing, Retail Services, Accommodation and Food Services, or Arts and Entertainment may fall within this category. Approximately one-third of the jobs in Sussex County - jobs in manufacturing, property management, construction, or local government - also earn incomes within this category.

Workforce Housing Needs

Current Housing Needs

The rate of housing cost burden in the County has declined since 2012. While promising, the housing stock in the County still does not meet the needs of all its residents, evidenced by the 24,167 households who spend a disproportionately high share of their income on housing costs. When transportation costs are factored in, Sussex County residents spend on average 56% of their income on housing costs plus transportation.

Given the large portion of the population who work in relatively lower-wage jobs and support Sussex County's tourism industry, retail sector, and agricultural industry, there is significant need for rental housing with monthly rents (plus utilities) under \$1,000. According to a report by Housing Alliance Delaware, minimum-wage employees would need to work 84 hours per week to afford a two-bedroom apartment in Sussex County, which equates to more than two full-time jobs. For single parents or

families with one income-earner, this is even more of a challenge. Renters would need to earn \$17.31 per hour in order to afford a two-bedroom apartment.²¹

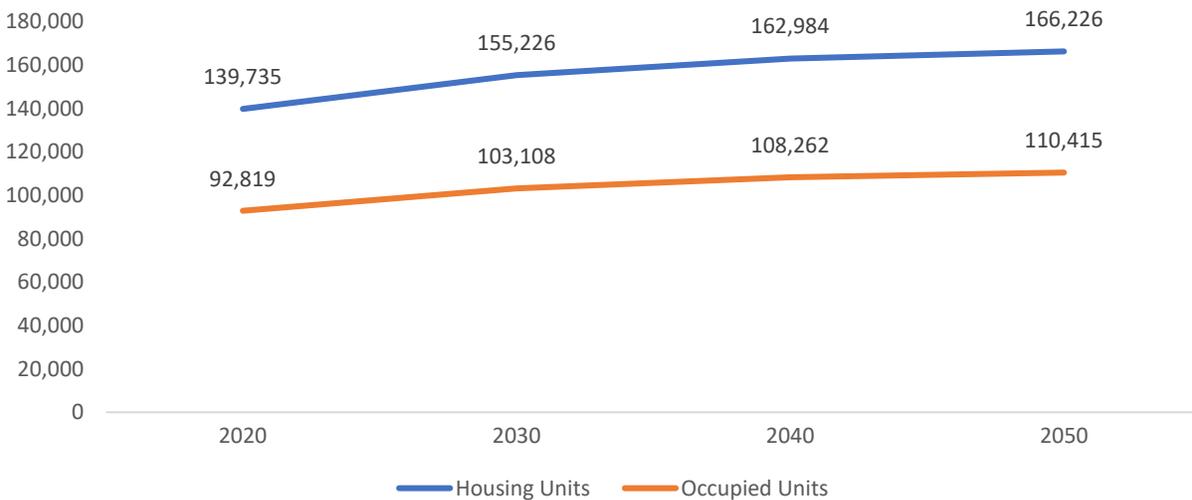
In addition, nearly half (44%) of the Sussex County workforce earn incomes that could only afford to buy homes priced below \$250,000, assuming two workers in the industry spend 3.5 times their annual income on a home. Currently, only one-quarter of the homes on the market are listed under \$250,000.²²

The need is particularly great for households who can afford homes under \$200,000. One-third of the workforce in Sussex County earn incomes that could afford no more than a \$200,000 home, but only 13% of for-sale market is listed for under \$200,000.

Future Housing Needs

The Delaware Population Consortium projects that Sussex County will continue to grow, but at a slower rate than in the last several years. Between 2020 and 2050, the number of housing units in the County is expected to increase by over 26,000. The Consortium also projects 8,894 vacant housing units during this same time, after applying a constant vacancy rate of 34%. Accounting for this projected vacancy, Sussex County is expected to gain 17,597 net new households over the next 30 years, a somewhat slower growth rate than the last several years.

Figure 24. Projection, Total Housing Units and Occupied Housing Units, Sussex County, 2020 - 2050



Source: The Delaware Population Consortium, Seasonal Population Projections 2020-2050, LSA

These forecasts are a starting place for assessing future housing demand and planning for housing affordable to all income groups in the County. Based on today's income data from the latest Comprehensive Housing Affordability Strategy, 22% (3,935 units) of future available housing units built should be affordable to households earning less than 50% of the area median income (AMI) in order to adequately accommodate future household growth. In today's dollars, this amounts to rents and

²¹ 2018 Report, The State of Housing and Homelessness in the First State, Housing Alliance Delaware

²² Using a review of listings on May 6, 2019.

utilities less than \$631 for a single person living alone and \$900 for a family of four. This includes 1,698 extremely low-income households who will need housing affordable to someone who earns \$15,150 for one person in today's dollars and who could only afford to spend about \$379 or less towards rent and utilities.

Table 7. Housing Demand by Income Group, Sussex County, 2020 to 2050

| | 2020-2030 | 2030-2040 | 2040-2050 | 2020-2050 |
|-----------------------------|---------------|--------------|--------------|---------------|
| Net New Units | 15,491 | 7,758 | 3,242 | 26,491 |
| Vacancy | 5,201 | 2,605 | 1,088 | 8,894 |
| Net New Households | 10,290 | 5,153 | 2,154 | 17,597 |
| Needed Units by AMI* | | | | |
| < 30% AMI | 993 | 497 | 208 | 1,698 |
| 30-50% AMI | 1,308 | 655 | 274 | 2,237 |
| 50-80% AMI | 1,718 | 860 | 360 | 2,938 |
| 80-100% AMI | 1,122 | 562 | 235 | 1,918 |
| > 100% AMI | 5,149 | 2,579 | 1,078 | 8,806 |
| Total | 10,290 | 5,153 | 2,154 | 17,597 |

Source: The Delaware Population Consortium Seasonal Vacancy Projection, 2015 Comprehensive Housing Affordability Strategy, LSA

*Multiplied percent of households at each AMI from today's latest data with net new household projection during each decade.

Another 17% (2,938 units) of the future housing stock should be affordable to households earning between 50% and 80% AMI. In today's dollars, this amounts to no more than \$40,400 for one person or \$57,680 for a family of four. A single person could afford a rental up to \$1,000 and a family of four could afford to purchase a home priced \$200,000 or less.

Table 8. Housing Affordability by Income

Single-Person Household

| | Income | Rent* | Mortgage** |
|-------------|---------------------|-------------------|-----------------------|
| < 30% AMI | < \$15,150 | < \$379 | < \$53,025 |
| 30-50% AMI | \$15,150 - \$25,250 | \$379 - \$631 | \$53,029 - \$88,375 |
| 50-80% AMI | \$25,250 - \$40,400 | \$631 - \$1,010 | \$88,375 - 141,400 |
| 80-100% AMI | \$40,400 - \$50,500 | \$1,010 - \$1,263 | \$141,400 - \$176,750 |

Family of 4

| | Income | Rent* | Mortgage** |
|--------------|---------------------|-------------------|-----------------------|
| < 30% AMI | < \$21,630 | < \$540 | < \$75,705 |
| 30-50% AMI | \$21,630 - \$36,050 | \$540 - \$901 | \$75,705 - \$126,175 |
| 50-80% AMI | \$36,050 - \$57,680 | \$901 - \$1,442 | \$126,175 - \$201,880 |
| 80- 100% AMI | \$57,680 - \$72,100 | \$1,442 - \$1,803 | \$201,880 - \$252,350 |

Sources: 2019 HUD Income Limits, Novogradac Income and Rent Limit Calculator; LSA

*Rent, utilities affordable at 30% of Gross Salary

** Mortgage affordable at 3.5 times gross household income

If trends continue as they have over the last few years, the number of net new households would be larger than reflected in the forecast and the need for housing affordable and available to lower-income households would be greater. For example, between 2010 and 2017, the number of housing units in the County increased by an average 2,142 each year; and in 2018 alone, the County approved permits for over 4,000 new units to be built in the next few years. Between 2020 and 2030, the Consortium projects that housing units will increase by an average 1,549 each year, and will slow by half that between 2030 and 2040.

Housing vacancy- largely due to seasonal homes- is trending slightly higher than the Consortium's projections. In the last couple of years, vacant units represent a share of the total housing stock that is 2 to 3 percentage points higher than the Consortium's 34% constant share. If the share of vacant units remains at its current 36% or trends even higher, the number of available units would be reduced, which would increase housing prices for those who live in the County year-round.

Many factors can influence the unit production and household growth among various income groups – land use strategies that promote (or discourage) housing development, policies that restrict (or encourage) seasonal properties that limit supply for those who live in the County year-round, and policies that encourage (or discourage) job growth are a few examples.

Conclusion

Sussex County is a growing community, a vibrant tourist destination and an increasingly popular retirement location. The increased demand for homes in the County, particularly among new, higher-income households, is shifting prices for both rental and for-sale homes higher. In addition, the large and growing older adult population and large number of households living without children will increase demand for smaller homes with accessible features. While many households have found lower-cost housing in Western Sussex, transportation and housing data suggest that the savings is lost from added transportation costs getting to and from work.

Development that promotes economic diversity may decrease sprawl, lessen traffic congestion, and decrease public investment towards infrastructure, and can reduce issues often associated with the concentration of poverty. The ability to attract new residents and visitors is dependent on the ability for workers at all income levels to afford housing that is appropriately-sized and located in the County.

The results from this analysis of population, employment, and affordability trends as well as the State's projections of new households suggest three broad conclusions that will shape a housing strategy for Sussex County:

- › First, cost-burden data suggest that many individuals and families are unable to afford a home without spending a disproportionate amount of their income towards housing and transportation. There is a need for more housing that is affordable to working individuals and families, particularly among households in lower-wage jobs.

- › Second, Sussex County's population and real estate growth is projected to continue over the next decade at nearly the same rates as it has in the last few years. There is an immediate need to identify obstacles (e.g. financial, regulatory) that have limited the supply of housing affordable to its workforce.

- › Third, the market may be able to better meet demands of housing for higher-income households; but in order to ensure that low- and moderate-wage working individuals and families can find housing they can afford, Sussex County will need to pursue proactive financing and regulatory strategies that are consistent with housing market and economic conditions in the County.



Photo Credit: LSA Planning

APPENDIX

Housing Needs + Market Analysis

Sussex County, Delaware
May 2019



Table of Contents to the Appendix

| | |
|--|--------------|
| POPULATION TABLES | 1-5 |
| POPULATION BY AGE GROUP & PROJECTIONS..... | 1 |
| POPULATION CHANGE | 2 |
| POPULATION BY RACE AND HISPANIC ORIGIN..... | 3 |
| POPULATION BY RACE AND HISPANIC ORIGIN, 2017 | 4 |
| RESIDENTIAL MOBILITY OF THE POPULATION, 2017..... | 5 |
| HOUSEHOLD TABLES | 6-13 |
| TENURE BY AGE OF HEAD OF HOUSEHOLD..... | 6 |
| MEDIAN HOUSEHOLD INCOME, 2012-2017..... | 7 |
| HOUSEHOLD INCOME | 8 |
| HOUSEHOLD BY HOUSEHOLD INCOME | 9 |
| HOUSEHOLDS BY HOUSEHOLD TYPE | 10 |
| AVERAGE HOUSEHOLD SIZE OF OCCUPIED HOUSING UNITS BY TENURE..... | 11 |
| YEAR MOVED INTO CURRENT HOME BY AGE OF HOUSEHOLD HEAD, 2013-2017 | 12 |
| HOMELESS POPULATION TRENDS..... | 13 |
| EMPLOYMENT TABLES | 14-20 |
| JOBS BY SECTOR..... | 14-15 |
| WAGES BY SECTOR | 16 |
| AVERAGE ANNUAL WAGE, 2017 | 17 |
| PLACE OF RESIDENCES FOR WORKERS, 2015 | 18 |
| PLACE OF WORK FOR RESIDENTS, 2015 | 19 |
| MODE OF COMMUTE TO WORK | 20 |
| HOUSING UNITS TABLES | 21-34 |
| HOUSING UNITS | 21 |
| HOUSING TENURE | 22 |
| HOUSING TYPE..... | 23 |
| HOUSING UNITS BY GROSS RENT | 24 |
| HOUSING UNITS BY HOME VALUE..... | 25 |
| APPROVED BUILDING PERMITS..... | 26 |
| HOUSING UNITS BY YEAR BUILT, 2017..... | 27 |
| VACANCY HOUSING UNITS REASON | 28 |
| SEASONAL POPULATION PROJECTIONS FOR HOUSING UNITS | 29 |
| RENTER HOUSEHOLDS BY HOUSING TYPE..... | 30 |
| OWNER HOUSEHOLDS BY HOUSING TYPE | 31 |
| TENURE BY HOUSING TYPE..... | 32 |
| TENURE BY AGE OF HOUSEHOLDER..... | 33 |
| DELAWARE ANNUAL FORECLOSURE FILINGS..... | 34 |
| AFFORDABILITY TABLES | 35-42 |
| HOUSING COST AS A PERCENT OF OWNER HOUSEHOLD INCOME | 35 |
| HOUSING COST AS A PERCENT OF RENTER HOUSEHOLD INCOME | 36 |
| HOUSING COST AS A PERCENT OF HOUSEHOLD INCOME BY HOUSEHOLD INCOME..... | 37 |
| HOMEOWNERSHIP RATE BY RACE | 38 |
| COST BURDEN AMONG RENTER HOUSEHOLDS | 39 |
| COST BURDEN AMONG RENTER HOUSEHOLDS BY RACE/ETHNICITY OF HEAD OF HOUSEHOLD | 40 |
| COST BURDEN AMONG RENTER HOUSEHOLDS BY HOUSEHOLD TYPE..... | 41 |
| COST BURDEN AMONG RENTER HOUSEHOLDS BY AGE OF HOUSEHOLD HEAD | 42 |

Population by Age Group
Sussex County, Delaware

| Population | | | | | | | | | | | | Pct. Change |
|-------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|--------------------|
| Age | 2000 | 2005 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2010-2017 | |
| Under 5 | 9,009 | 10,477 | 11,487 | 11,569 | 11,554 | 11,353 | 11,324 | 11,232 | 11,342 | 11,372 | -1.0% | |
| 5-17 | 26,296 | 25,936 | 28,820 | 29,034 | 29,212 | 29,312 | 29,789 | 30,450 | 30,845 | 31,106 | 7.9% | |
| 18-24 | 10,950 | 13,400 | 14,366 | 14,430 | 14,755 | 14,791 | 14,838 | 14,586 | 14,404 | 14,410 | 0.3% | |
| 25-34 | 17,811 | 20,420 | 20,656 | 21,169 | 21,328 | 21,567 | 21,830 | 22,419 | 22,842 | 23,298 | 12.8% | |
| 35-44 | 23,425 | 24,017 | 22,219 | 21,560 | 21,276 | 21,173 | 21,226 | 21,213 | 21,299 | 21,627 | -2.7% | |
| 45-54 | 21,312 | 24,509 | 28,390 | 28,366 | 28,153 | 27,724 | 27,398 | 27,299 | 27,116 | 26,929 | -5.1% | |
| 55-64 | 18,813 | 21,453 | 30,134 | 31,310 | 31,345 | 31,978 | 32,956 | 33,996 | 35,159 | 36,364 | 20.7% | |
| 65-74 | 17,091 | 18,285 | 24,259 | 25,507 | 27,600 | 29,651 | 31,510 | 33,404 | 35,504 | 37,645 | 55.2% | |
| 75-84 | 9,362 | 11,718 | 12,669 | 13,188 | 13,530 | 14,119 | 14,821 | 15,414 | 16,179 | 17,005 | 34.2% | |
| 85+ | 2,569 | 2,896 | 4,145 | 4,320 | 4,553 | 4,810 | 4,984 | 5,175 | 5,403 | 5,566 | 34.3% | |
| Total Population | 156,638 | 173,111 | 197,145 | 200,453 | 203,306 | 206,478 | 210,676 | 215,188 | 220,093 | 225,322 | 13.9% | |

Source: U.S. Census Bureau, Annual Estimates of the Resident Population for Selected Age Groups by Sex for the United States, States, Counties, and Puerto Rico Commonwealth and Municípios: April 1, 2010 to July 1, 2017

| Population Projections | | | | | | | Pct. Change |
|-------------------------------|----------------|----------------|------------------|------------------|------------------|------------------|--------------------|
| Select Jurisdictions | 2015 | 2020 | 2030 | 2040 | 2050 | 2015-2050 | |
| Sussex County, DE | 215,402 | 235,396 | 255,143 | 268,180 | 277,871 | 22.5% | |
| Seaford, DE | 7,186 | 8,039 | 9,177 | 10,356 | 11,666 | 38.4% | |
| Georgetown, DE | 6,723 | 7,578 | 8,714 | 9,915 | 11,273 | 40.4% | |
| Millsboro, DE | 4,018 | 4,536 | 5,223 | 5,950 | 6,775 | 40.7% | |
| Laurel, DE | 3,984 | 4,488 | 5,158 | 5,864 | 6,662 | 40.2% | |
| Lewes, DE | 2,855 | 3,199 | 3,658 | 4,136 | 4,668 | 38.8% | |
| New Castle, County DE | 555,115 | 571,165 | 596,221 | 606,346 | 606,162 | 8.4% | |
| Kent County, DE | 175,412 | 183,242 | 193,601 | 201,639 | 210,671 | 16.7% | |
| Delaware | 945,929 | 989,803 | 1,044,965 | 1,076,165 | 1,094,704 | 13.6% | |

Source: The Delaware Population Consortium Population Projections Place 2015 ACS Population Estimates and 2020-2050

Population Change

Select Jurisdictions

| Population | | | | | | | | | Pct. Change |
|-----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------------|
| Select Jurisdictions | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2010-2017 |
| Sussex County, DE | 197,145 | 200,453 | 203,306 | 206,478 | 210,676 | 215,188 | 220,093 | 225,322 | 14.3% |
| Seaford, DE | 6,928 | 7,007 | 7,092 | 7,186 | 7,312 | 7,445 | 7,592 | 7,750 | 11.9% |
| Georgetown, DE | 6,422 | 6,537 | 6,624 | 6,723 | 6,850 | 6,986 | 7,135 | 7,291 | 13.5% |
| Millsboro, DE | 3,877 | 3,907 | 3,960 | 4,018 | 4,096 | 4,177 | 4,266 | 4,365 | 12.6% |
| Laurel, DE | 3,708 | 3,879 | 3,929 | 3,984 | 4,059 | 4,140 | 4,227 | 4,320 | 16.5% |
| Lewes, DE | 2,747 | 2,782 | 2,816 | 2,855 | 2,906 | 2,963 | 3,020 | 3,083 | 12.2% |
| Kent County, DE | 162,310 | 165,149 | 167,442 | 169,150 | 171,664 | 173,332 | 174,754 | 176,824 | 8.9% |
| New Castle County, DE | 538,479 | 542,282 | 546,120 | 549,486 | 552,465 | 555,587 | 557,851 | 559,793 | 4.0% |
| Delaware | 897,934 | 907,884 | 916,868 | 925,114 | 934,805 | 944,107 | 952,698 | 961,939 | 7.1% |
| Caroline County, MD | 33,066 | 32,898 | 32,643 | 32,666 | 32,558 | 32,620 | 32,887 | 33,193 | 0.4% |
| Dorchester County, MD | 32,618 | 32,700 | 32,475 | 32,575 | 32,513 | 32,411 | 32,267 | 32,162 | -1.4% |
| Wicomico County, MD | 98,733 | 100,110 | 100,597 | 100,957 | 101,546 | 102,058 | 102,585 | 102,923 | 4.2% |
| Worcester County, MD | 51,454 | 51,505 | 51,579 | 51,555 | 51,581 | 51,455 | 51,514 | 51,690 | 0.5% |

Source: U.S. Census Bureau, Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2017 Population Estimates

Population by Race and Hispanic Origin

Sussex County, DE

| Population by Race | | | | | | | | | Pct. Change |
|---------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------------|
| Race and Hispanic Origin | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2010-2017 |
| Non-Hispanic | 180,191 | 182,710 | 184,987 | 187,714 | 191,428 | 195,419 | 199,687 | 204,209 | 13.3% |
| White | 149,289 | 151,135 | 152,869 | 155,140 | 158,080 | 161,445 | 165,092 | 169,037 | 13.2% |
| Black/African-American | 24,643 | 25,034 | 25,320 | 25,605 | 26,037 | 26,481 | 26,760 | 27,063 | 9.8% |
| Asian or Pacific Islander | 2,045 | 2164 | 2,241 | 2,301 | 2,497 | 2,642 | 2,808 | 2,980 | 45.7% |
| Multi-racial/Other | 4,214 | 4377 | 4,557 | 4,668 | 4,814 | 4,851 | 5,027 | 5,129 | 21.7% |
| Hispanic | 16,954 | 17,743 | 18,319 | 18,764 | 19,248 | 19,769 | 20,406 | 21,113 | 24.5% |
| Total Population | 197,145 | 200,453 | 203,306 | 206,478 | 210,676 | 215,188 | 220,093 | 225,322 | 14.3% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25024

Population by Race and Hispanic Origin, 2017

Select Jurisdictions

| Race and Hispanic Origin | Sussex County, DE | Kent County, DE | New Castle County, DE | Delaware | Caroline County, MD | Dorchester County, MD | Wicomico County, MD | Worcester County, MD |
|---------------------------------|--------------------------|------------------------|------------------------------|-----------------|----------------------------|------------------------------|----------------------------|-----------------------------|
| Non-Hispanic | 204,209 | 164,121 | 504,070 | 872,400 | 30,703 | 30,356 | 97,400 | 49,889 |
| White | 169,037 | 109,126 | 321,097 | 599,260 | 25,039 | 20,209 | 64,576 | 41,375 |
| Black/African-American | 27,063 | 44,160 | 137,747 | 208,970 | 4,541 | 9,009 | 26,901 | 6,732 |
| Asian or Pacific Islander | 2,980 | 4,218 | 32,250 | 39,448 | 316 | 397 | 3,270 | 793 |
| Multi-racial/Other | 5,129 | 6,617 | 12,976 | 24,722 | 807 | 741 | 2,653 | 989 |
| Hispanic | 21,113 | 12,703 | 55,723 | 89,539 | 2,490 | 1,806 | 5,523 | 1,801 |
| Total Population | 225,322 | 176,824 | 559,793 | 961,939 | 33,193 | 32,162 | 102,923 | 51,690 |

Source: U.S. Census Bureau, Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States, States, and Counties: April 1, 2010 to July 1, 2017

Share of Total

| Race and Hispanic Origin | Sussex County, DE | Kent County, DE | New Castle County, DE | Delaware | Caroline County, MD | Dorchester County, MD | Wicomico County, MD | Worcester County, MD |
|---------------------------------|--------------------------|------------------------|------------------------------|-----------------|----------------------------|------------------------------|----------------------------|-----------------------------|
| Non-Hispanic | 90.6% | 92.8% | 90.0% | 90.7% | 92.5% | 94.4% | 94.6% | 96.5% |
| White | 75.0% | 61.7% | 57.4% | 62.3% | 75.4% | 62.8% | 62.7% | 80.0% |
| Black/African-American | 12.0% | 25.0% | 24.6% | 21.7% | 13.7% | 28.0% | 26.1% | 13.0% |
| Asian or Pacific Islander | 1.3% | 2.4% | 5.8% | 4.1% | 1.0% | 1.2% | 3.2% | 1.5% |
| Multi-racial/Other | 2.3% | 3.7% | 2.3% | 2.6% | 2.4% | 2.3% | 2.6% | 1.9% |
| Hispanic | 9.4% | 7.2% | 10.0% | 9.3% | 7.5% | 5.6% | 5.4% | 3.5% |
| Total Population | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

Source: U.S. Census Bureau, Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States, States, and Counties: April 1, 2010 to July 1, 2017

Residential Mobility of the Population, 2017

Sussex County, DE

| | No. | Pct. |
|---------------------------------------|----------------|---------------|
| Did not move in the last year | 198,958 | 89.1% |
| Moved in the last year | 24,444 | 10.9% |
| Moved within Sussex County | 12,159 | 5.4% |
| Moved from somewhere else in Delaware | 1,858 | 0.8% |
| Moved from a different state | 10,096 | 4.5% |
| Moved from abroad | 331 | 0.1% |
| Total | 223,402 | 100.0% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B07001

Tenure by Age of Head of Household

Sussex County, DE

| Age | Total Households | | | Homeowners | | | Renters | | | Homeownership Rate | | |
|-------------------------|------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------------|--------------|--------------|
| | 2000 | 2012 | 2017 | 2000 | 2012 | 2017 | 2000 | 2012 | 2017 | 2000 | 2012 | 2017 |
| Under 25 | 2,070 | 956 | 995 | 739 | 200 | 425 | 1,331 | 756 | 570 | 35.7% | 20.9% | 42.7% |
| 25-34 | 7,739 | 7,499 | 9,690 | 4,712 | 3,855 | 5,001 | 3,027 | 3,644 | 4,689 | 60.9% | 51.4% | 51.6% |
| 35-44 | 12,159 | 9,801 | 10,846 | 9,277 | 5,510 | 6,998 | 2,882 | 4,291 | 3,848 | 76.3% | 56.2% | 64.5% |
| 45-54 | 11,660 | 14,614 | 12,240 | 9,717 | 11,443 | 11,006 | 1,943 | 3,171 | 1,234 | 83.3% | 78.3% | 89.9% |
| 55-64 | 10,667 | 16,928 | 19,534 | 9,602 | 14,571 | 17,154 | 1,065 | 2,357 | 2,380 | 90.0% | 86.1% | 87.8% |
| 65+ | 18,282 | 28,197 | 34,724 | 16,437 | 24,476 | 31,552 | 1,845 | 3,721 | 3,172 | 89.9% | 86.8% | 90.9% |
| Total Households | 62,577 | 77,995 | 88,029 | 50,484 | 60,055 | 72,136 | 12,093 | 17,940 | 15,893 | 80.7% | 77.0% | 81.9% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25024

| Share of Total | Total Households | | | Homeowners | | | Renters | | |
|----------------|------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | 2000 | 2012 | 2017 | 2000 | 2012 | 2017 | 2000 | 2012 | 2017 |
| Under 25 | 3.3% | 1.2% | 1.1% | 1.5% | 0.3% | 0.6% | 11.0% | 4.2% | 3.6% |
| 25-34 | 12.4% | 9.6% | 11.0% | 9.3% | 6.4% | 6.9% | 25.0% | 20.3% | 29.5% |
| 35-44 | 19.4% | 12.6% | 12.3% | 18.4% | 9.2% | 9.7% | 23.8% | 23.9% | 24.2% |
| 45-54 | 18.6% | 18.7% | 13.9% | 19.2% | 19.1% | 15.3% | 16.1% | 17.7% | 7.8% |
| 55-64 | 17.0% | 21.7% | 22.2% | 19.0% | 24.3% | 23.8% | 8.8% | 13.1% | 15.0% |
| 65+ | 29.2% | 36.2% | 39.4% | 32.6% | 40.8% | 43.7% | 15.3% | 20.7% | 20.0% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25007

Median Household Income, 2012-2017 (Adjusted Dollars)

Select Jurisdictions

| | Sussex County, DE | Kent County, DE | New Castle Couny, DE | Delaware | Caroline County, MD | Dorchester County, MD | Wicomico County, MD | Worcester County, MD |
|--------------------------------|----------------------|--------------------|-------------------------|----------|------------------------|--------------------------|------------------------|-------------------------|
| Median Household Income | 57,901 | 57,647 | 68,336 | 63,036 | 52,469 | 50,532 | 54,493 | 59,458 |

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B19013

Household Income (Adjusted Dollars)

Sussex County, DE

| Household Income | 2012 (2012 \$s) | 2017 (2017 \$s) | Percent Change |
|-------------------------|----------------------------|----------------------------|---------------------------|
| <\$20,000 | 13,329 | 11,571 | -13.2% |
| \$20,000 - 34,999 | 14,486 | 12,837 | -11.4% |
| \$35,000 - 49,999 | 11,443 | 11,044 | -3.5% |
| \$50,000 - 74,999 | 14,053 | 17,727 | 26.1% |
| \$75,000 - 99,999 | 10,504 | 12,244 | 16.6% |
| \$100,000 - 149,999 | 9,512 | 12,375 | 30.1% |
| \$150,000+ | 4,668 | 10,231 | 119.2% |
| Total Households | 77,995 | 88,029 | 12.9% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25024

Share of Total

| Household Income | 2012 (2012 \$s) | 2017 (2017 \$s) |
|-------------------------|----------------------------|----------------------------|
| <\$20,000 | 17.1% | 13.1% |
| \$20,000 - 34,999 | 18.6% | 14.6% |
| \$35,000 - 49,999 | 14.7% | 12.5% |
| \$50,000 - 74,999 | 18.0% | 20.1% |
| \$75,000 - 99,999 | 13.5% | 13.9% |
| \$100,000 - 149,999 | 12.2% | 14.1% |
| \$150,000+ | 6.0% | 11.6% |
| Total Households | 100.0% | 100.0% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B19001

Households by Household Income, 2017 (in 2017 \$s)

Selected Jurisdictions

| Household Income | Sussex County, DE | Kent County, DE | New Castle County, DE |
|-------------------------|----------------------|--------------------|--------------------------|
| <\$20,000 | 11,571 | 9,753 | 31,896 |
| \$20,000 - 34,999 | 12,837 | 10,576 | 24,981 |
| \$35,000 - 49,999 | 11,044 | 7,369 | 23,042 |
| \$50,000 - 74,999 | 17,727 | 13,173 | 33,130 |
| \$75,000 - 99,999 | 12,244 | 8,888 | 27,092 |
| \$100,000 - 149,999 | 12,375 | 7,807 | 32,133 |
| \$150,000+ | 10,231 | 6,241 | 33,827 |
| Total Households | 88,029 | 63,807 | 206,101 |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25024

Share of Total

| Household Income | Sussex County, DE | Kent County, DE | New Castle County, DE |
|-------------------------|----------------------|--------------------|--------------------------|
| <\$20,000 | 13.1% | 15.3% | 15.5% |
| \$20,000 - 34,999 | 14.6% | 16.6% | 12.1% |
| \$35,000 - 49,999 | 12.5% | 11.5% | 11.2% |
| \$50,000 - 74,999 | 20.1% | 20.6% | 16.1% |
| \$75,000 - 99,999 | 13.9% | 13.9% | 13.1% |
| \$100,000 - 149,999 | 14.1% | 12.2% | 15.6% |
| \$150,000+ | 11.6% | 9.8% | 16.4% |
| Total Households | 100.0% | 100.0% | 100.0% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B19001

Households by Household Type

Sussex County, DE

| Households | Pct. Change | | | | |
|--------------------------------------|---------------|---------------|---------------|-------------|--------------|
| | 2007 | 2012 | 2017 | 2007-2012 | 2012-2017 |
| Household Type | | | | | |
| Married Couple, w/ Children* | 11,705 | 10,314 | 11,877 | -11.9% | 15.2% |
| Married Couple, w/o Children* | 26,931 | 28,324 | 39,033 | 5.2% | 37.8% |
| Single Parent | 7,286 | 6,034 | 5,831 | -17.2% | -3.4% |
| Other Family, w/o Children* | 6,064 | 6,455 | 5,127 | 6.4% | -20.6% |
| Other (RV, mobile home, boat, etc.)* | 6,809 | 9,997 | 9,698 | 46.8% | -3.0% |
| Living Alone (Under 65) | 11,896 | 12,518 | 11,806 | 5.2% | -5.7% |
| Other Non-Family, Not Living Alone | 4,024 | 4,353 | 4,657 | 8.2% | 7.0% |
| Total Households | 74,715 | 77,995 | 88,029 | 4.4% | 12.9% |

*Own children

Source: U.S. Census Bureau, 5-Year American Community Survey, Tables S1101

| Share of Total | | | |
|------------------------------------|---------------|---------------|---------------|
| Household Type | 2007 | 2012 | 2017 |
| Married Couple, w/ Children* | 15.7% | 13.2% | 13.5% |
| Married Couple, w/o Children* | 36.0% | 36.3% | 44.3% |
| Single Parent | 9.8% | 7.7% | 6.6% |
| Other Family, w/o Children* | 8.1% | 8.3% | 5.8% |
| Living Alone (65+) | 9.1% | 12.8% | 11.02% |
| Living Alone (Under 65) | 15.9% | 16.0% | 13.41% |
| Other Non-Family, Not Living Alone | 5.4% | 5.6% | 5.3% |
| Total Households | 100.0% | 100.0% | 100.0% |

*Own children

Source: U.S. Census Bureau, 5-Year American Community Survey, Tables S1101

Average Household Size by Tenure, 2017

Select Jurisdictions

| Sussex County Average Household Size | 2012 | 2017 |
|---|-------------|-------------|
| Homeowners | 2.57 | 2.47 |
| Renters | 3.00 | 2.76 |
| Total Household Size | 2.57 | 2.53 |

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25010

| Average Household Size | 2012 | 2017 |
|-------------------------------|-------------|-------------|
| Sussex County, DE | 2.57 | 2.53 |
| Kent County, DE | 2.73 | 2.69 |
| New Castle County, DE | 2.61 | 2.63 |
| Delaware | 2.62 | 2.62 |

Source: U.S. Census Bureau, 5-Year American Community Survey, Table B25010

Year Moved into Current Home by Age of Household Head, 2017

Sussex County, DE

| Year | Age of Household Head | | |
|-------------------------|-----------------------|---------------|---------------|
| | Under 35 | 35 to 64 | 65 and Older |
| 2015 or later | 5,047 | 9500 | 6154 |
| 2010 to 2014 | 4,145 | 10,688 | 6,033 |
| 2000 to 2009 | 1,386 | 14,903 | 11,550 |
| 1990 to 1999 | 19 | 4659 | 4,742 |
| 1980 to 1989 | 88 | 2047 | 2,501 |
| 1979 or earlier | 0 | 823 | 3,744 |
| Total Households | 10,685 | 42,620 | 34,724 |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25024

| Year | Age of Household Head | | |
|-------------------------|-----------------------|---------------|---------------|
| | Under 35 | 35 to 64 | 65 and Older |
| 2015 or later | 47.2% | 22.3% | 17.7% |
| 2010 to 2014 | 38.8% | 25.1% | 17.4% |
| 2000 to 2009 | 13.0% | 35.0% | 33.3% |
| 1990 to 1999 | 0.2% | 10.9% | 13.7% |
| 1980 to 1989 | 0.8% | 4.8% | 7.2% |
| 1979 or earlier | 0.0% | 1.9% | 10.8% |
| Total Households | 100.0% | 100.0% | 100.0% |

Source: U.S. Census Bureau, 1-Year American Community Survey, B25128

Homeless Population Trends

Delaware

| Homeless Type | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|----------------------|-------------|--------------|-------------|--------------|--------------|-------------|-------------|-------------|--------------|-------------|--------------|
| Sheltered | 862 | 1,083 | 930 | 1,013 | 986 | 936 | 864 | 916 | 1,019 | 936 | 989 |
| Unsheltered | 71 | 47 | 52 | 22 | 22 | 10 | 37 | 37 | 51 | 58 | 93 |
| Total | 933 | 1,130 | 982 | 1,035 | 1,008 | 946 | 901 | 953 | 1,070 | 994 | 1,082 |

Source: U.S. Department of Housing and Urban Development, Continuum of Care Homeless Assistance Program, 2008-2018 Homeless Populations and Subpopulations

Average Monthly Employment, Jobs by Sector

Job Located in Sussex County, DE

| Jobs by NAICS Industry Sector | | | | | | Annual Pct 2002-2007 | Annual Pct 2012-2018 |
|--|---------------|---------------|---------------|---------------|---------------|---------------------------------|---------------------------------|
| Sector | 2002 | 2007 | 2012 | 2017 | 2018 | | |
| Agriculture, Forestry, Fishing, and Hunting | 692 | 739 | 840 | * | 892 * | 4.3% | 1.2% |
| Mining, Quarrying, And Oil and Gas Extraction | * | * | * | * | * | * | * |
| Utilities | 339 | 383 | 353 | 328 | 310 | 0.8% | -2.4% |
| Construction | 4,538 | 5,552 | 3,527 | 4,732 | 5,036 | 4.5% | 8.6% |
| Other (RV, mobile home, boat, etc.)* | 11,308 | 13,074 | 10,506 | 9,886 | 10,476 | 3.1% | -0.1% |
| Wholesale Trade | 1,196 | 1,406 | 1,423 | 1,721 | 1,642 | 3.5% | 3.1% |
| Retail Trade | 10,993 | 11,271 | 11,284 | 12,479 | 12,660 | 0.5% | 2.4% |
| Transportation & Warehousing | 1,344 | 1,920 | 1,289 | 1,532 | 1,615 | 8.6% | 5.1% |
| Information | 506 | 515 | 474 | 498 | 499 | 0.4% | 1.1% |
| Finance & Insurance | 2,628 | 1,648 | 1,838 | 1,741 | 1,733 | -7.5% | -1.1% |
| Real Estate & Rental & Leasing | 1,463 | 2,052 | 1,645 | 1,392 | 1,433 | 8.1% | -2.6% |
| Professional, Scientific, & Technical Services | 1,211 | 1,549 | 1,595 | 1,883 | 2,004 | 5.6% | 5.1% |
| Management of Companies & Enterprises | * | * | 173 | 224 | 220 | * | 5.4% |
| Admin and Support and Waste Management | 2,389 | 2,655 | 2,760 | 4,826 | 5,299 | 2.2% | 18.4% |
| Educational Services | 73 | 173 | 156 | 220 | 237 | 27.4% | 10.4% |
| Health Care & Social Assistance | 6,853 | 8,151 | 9,874 | 12,022 | 11,872 | 3.8% | 4.0% |
| Arts, Entertainment, & Recreation | 771 | 913 | 1,085 | 1,460 | 1,530 | 3.7% | 8.2% |
| Accommodation & Food Services | 7,927 | 8,607 | 9,470 | 12,228 | 12,968 | 1.7% | 7.4% |
| Other Services (except Public Administration) | 2,151 | 2,370 | 2,401 | 2,564 | 2,587 | 2.0% | 1.5% |
| Public Administration | 6,009 | 7,659 | 8,018 | 8,672 | 8,709 | 5.5% | 1.7% |
| Total | 62,391 | 70,637 | 68,711 | 78,408 | 81,722 | 2.6% | 3.8% |

Note: * Indicates non-releasable data, 2018 Agriculture data obtained from the Bureau of Labor Statistics

Source: Delaware Department of Labor, Quarterly Census of Employment & Wages

Average Monthly Employment, Jobs by Sector

Job Located in Sussex County, DE

| Share of Total | | | | | |
|--|---------------|---------------|---------------|---------------|---------------|
| Sector | 2002 | 2007 | 2012 | 2017 | 2018 |
| Agriculture, Forestry, Fishing, and Hunting | 1.1% | 1.0% | 1.2% | * | 1.1% |
| Mining, Quarrying, And Oil and Gas Extraction | * | * | * | * | * |
| Utilities | 0.5% | 0.5% | 0.5% | 0.4% | 0.4% |
| Construction | 7.3% | 7.9% | 5.1% | 6.0% | 6.2% |
| Manufacturing | 18.1% | 18.5% | 15.3% | 12.6% | 12.8% |
| Wholesale Trade | 1.9% | 2.0% | 2.1% | 2.2% | 2.0% |
| Retail Trade | 17.6% | 16.0% | 16.4% | 15.9% | 15.5% |
| Transportation and Warehousing | 2.2% | 2.7% | 1.9% | 2.0% | 2.0% |
| Information | 0.8% | 0.7% | 0.7% | 0.6% | 0.6% |
| Finance and Insurance | 4.2% | 2.3% | 2.7% | 2.2% | 2.1% |
| Real Estate and Rental and Leasing | 2.3% | 2.9% | 2.4% | 1.8% | 1.8% |
| Professional, Scientific, and Technical Services | 1.9% | 2.2% | 2.3% | 2.4% | 2.5% |
| Management of Companies and Enterprises | * | * | 0.3% | 0.3% | 0.3% |
| Admin and Support and Waste Management | 3.8% | 3.8% | 4.0% | 6.2% | 6.5% |
| Educational Services | 0.1% | 0.2% | 0.2% | 0.3% | 0.3% |
| Health Care and Social Assistance | 11.0% | 11.5% | 14.4% | 15.3% | 14.5% |
| Arts, Entertainment, and Recreation | 1.2% | 1.3% | 1.6% | 1.9% | 1.9% |
| Accommodation and Food Services | 12.7% | 12.2% | 13.8% | 15.6% | 15.9% |
| Other Services (except Public Administration) | 3.4% | 3.4% | 3.5% | 3.3% | 3.2% |
| Public Administration | 9.6% | 10.8% | 11.7% | 11.1% | 10.7% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Note: * Indicates non-releasable data

Source: Delaware Department of Labor, Quarterly Census of Employment & Wages

Average Annual Wages by Sector

Job Located in Sussex County, DE

| Jobs by NAICS Industry Sector | | | | | | Annual Pct | Annual Pct | Annual Pct |
|--|------------------|------------------|------------------|------------------|------------------|-------------------|-------------------|-------------------|
| Sector | 2002 | 2007 | 2012 | 2017 | 2018 | 2002-2007 | 2007-2012 | 2012-2018 |
| Agriculture, Forestry, Fishing, and Hunting | \$ 27,319 | \$ 34,264 | \$ 31,403 | * | \$ 35,253 | 5.1% | -1.7% | 2.5% |
| Mining, Quarrying, And Oil and Gas Extraction | * | * | * | * | * | * | | * |
| Utilities | \$ 60,549 | \$ 77,710 | \$ 91,646 | \$100,769 | \$105,591 | 5.7% | 3.6% | 3.0% |
| Construction | \$ 28,698 | \$ 36,925 | \$ 39,196 | \$ 47,685 | \$ 49,107 | 5.7% | 1.2% | 5.1% |
| Other (RV, mobile home, boat, etc.)* | \$ 28,937 | \$ 38,848 | \$ 36,858 | \$ 43,739 | \$ 45,242 | 6.9% | -1.0% | 4.5% |
| Wholesale Trade | \$ 36,207 | \$ 45,156 | \$ 52,320 | \$ 59,251 | \$ 62,363 | 4.9% | 3.2% | 3.8% |
| Retail Trade | \$ 20,401 | \$ 24,769 | \$ 24,228 | \$ 27,423 | \$ 28,025 | 4.3% | -0.4% | 3.1% |
| Transportation & Warehousing | \$ 30,177 | \$ 31,737 | \$ 34,940 | \$ 38,964 | \$ 42,074 | 1.0% | 2.0% | 4.1% |
| Information | \$ 32,072 | \$ 40,132 | \$ 42,539 | \$ 56,810 | \$ 64,884 | 5.0% | 1.2% | 10.5% |
| Finance & Insurance | \$ 35,031 | \$ 38,589 | \$ 49,757 | \$ 63,752 | \$ 63,527 | 2.0% | 5.8% | 5.5% |
| Real Estate & Rental & Leasing | \$ 29,739 | \$ 34,859 | \$ 33,472 | \$ 41,568 | \$ 43,871 | 3.4% | -0.8% | 6.2% |
| Professional, Scientific, & Technical Services | \$ 41,595 | \$ 49,340 | \$ 51,807 | \$ 65,618 | \$ 67,645 | 3.7% | 1.0% | 6.1% |
| Management of Companies & Enterprises | * | * | \$ 112,248 | \$150,228 | \$156,318 | * | * | 7.9% |
| Admin and Support and Waste Management | \$ 16,276 | \$ 22,973 | \$ 26,975 | \$ 32,274 | \$ 32,956 | 8.2% | 3.5% | 4.4% |
| Educational Services | \$ 23,620 | \$ 20,911 | \$ 23,407 | \$ 28,424 | \$ 27,866 | -2.3% | 2.4% | 3.8% |
| Health Care & Social Assistance | \$ 32,549 | \$ 41,379 | \$ 46,890 | \$ 52,514 | \$ 54,092 | 5.4% | 2.7% | 3.1% |
| Arts, Entertainment, & Recreation | \$ 16,917 | \$ 20,485 | \$ 21,653 | \$ 21,634 | \$ 22,127 | 4.2% | 1.1% | 0.4% |
| Accommodation & Food Services | \$ 13,824 | \$ 16,356 | \$ 17,105 | \$ 20,233 | \$ 20,582 | 3.7% | 0.9% | 4.1% |
| Other Services (except Public Administration) | \$ 19,476 | \$ 22,546 | \$ 25,032 | \$ 29,255 | \$ 30,023 | 3.2% | 2.2% | 4.0% |
| Public Administration | \$ 35,322 | \$ 39,330 | \$ 42,096 | \$ 46,254 | \$ 48,387 | 2.3% | 1.4% | 2.0% |
| Weighted Average Wage | \$ 26,518 | \$ 32,968 | \$ 34,493 | \$ 39,498 | \$ 40,471 | 4.9% | 0.9% | 3.5% |

Note: * Indicates non-releasable data, 2018 Agriculture data obtained from the Bureau of Labor Statistics

Source: Delaware Department of Labor, Quarterly Census of Employment & Wages

Average Annual Wage, 2017

Select Jurisdictions

| Average Wage | 2017 |
|---------------------|-------------|
| Sussex County | \$39,498 |
| Kent County | \$42,541 |
| New Castle County | \$62,891 |
| Delaware | \$55,856 |

Source: Delaware Department of Labor, Quarterly Census of Employment & Wages

Place of Residence for Workers, 2015

Select Jurisdictions

| Place of Work | Sussex County, DE | | Kent County, DE | | New Castle County, DE | |
|-------------------------------------|-------------------|------------------|-----------------|------------------|-----------------------|------------------|
| | # of Workers | Share of Workers | # of Workers | Share of Workers | # of Workers | Share of Workers |
| Place of Residence by County | | | | | | |
| Sussex County, DE | 45,719 | 71.8% | 8,919 | 17.7% | 7,025 | 2.6% |
| Kent County, DE | 6,463 | 10.2% | 36,787 | 72.9% | 14,776 | 5.4% |
| New Castle County, DE | 2,668 | 4.2% | 8,035 | 15.9% | 184,902 | 68.1% |
| Wicomico County, MD | 2,582 | 4.1% | 224 | 0.4% | | |
| Other (RV, mobile home, boat, | 1,352 | 2.1% | | | | |
| Caroline County, MD | 549 | 0.9% | 549 | 1.1% | | |
| Dorchester County, MD | 434 | 0.7% | | | | |
| Queen Anne's County, MD | 270 | 0.4% | 353 | 0.7% | | |
| Somerset County, MD | 235 | 0.4% | | | | |
| Talbot County, MD | 235 | 0.4% | | | | |
| Cecil County, MD | | | 580 | 1.1% | 10,360 | 3.8% |
| Delaware County, PA | | | 293 | 0.6% | 10,799 | 4.0% |
| Chester County, PA | | | 281 | 0.6% | 15,793 | 5.8% |
| Kent County, MD | | | 237 | 0.5% | | |
| Philadelphia County, PA | | | | | 3,918 | 1.4% |
| Gloucester County, NJ | | | | | 3,556 | 1.3% |
| Salem County, NJ | | | | | 3,389 | 1.2% |
| Montgomery County, PA | | | | | 1,943 | 0.7% |
| All other locations | 3,160 | 5.0% | 3,108 | 6.2% | 15,093 | 5.6% |
| Total | 63,667 | 100.0% | 50,447 | 100.0% | 271,554 | 100.0% |

Source: U.S. Census Bureau, On The Map

| Place of Work | Sussex County, DE | |
|-----------------------------------|-------------------|------------------|
| | # of Workers | Share of Workers |
| Place of Residence by City | | |
| Seaford City, DE | 1,755 | 2.8% |
| Georgetown town, DE | 1,618 | 2.5% |
| Milford City, DE | 1,407 | 2.2% |
| Dover City, DE | 1,033 | 1.6% |
| Millsboro town, DE | 987 | 1.6% |
| Sailsbury City, MD | 880 | 1.4% |
| Laurel town, DE | 787 | 1.2% |
| Milton town, DE | 716 | 1.1% |
| Lewes City, DE | 595 | 0.9% |
| Long Neck CDP, DE | 463 | 0.7% |
| All other locations | 53,426 | 83.9% |
| Total | 63,667 | 100.0% |

Source: U.S. Census Bureau, On The Map

Place of Work for Residents, 2015

Select Jurisdictions

| Place of Residence | Sussex County, DE | | Kent County, DE | | New Castle County, DE | |
|--|-------------------|------------------|-----------------|------------------|-----------------------|------------------|
| | # of Workers | Share of Workers | # of Workers | Share of Workers | # of Workers | Share of Workers |
| Place of Work by County | | | | | | |
| Sussex County, DE | 45,719 | 60.3% | 6,463 | 10.0% | 2,582 | 1.1% |
| Kent County, DE | 8,919 | 11.8% | 36,787 | 56.8% | 8,035 | 3.3% |
| Wicomico County, MD | 7,025 | 9.3% | | 0.0% | | 0.0% |
| New Castle County, DE | 4,053 | 5.3% | 14,776 | 22.8% | 184,902 | 76.4% |
| Other (RV, mobile home, Caroline County, MD) | 1,885 | 2.5% | | 0.0% | | |
| Dorchester County MD | 757 | 1.0% | 432 | 0.7% | | 0.0% |
| Anne Arundel County, MD | 631 | 0.8% | | 0.0% | | 0.0% |
| Somerset County, MD | 573 | 0.8% | 272 | 0.4% | | 0.0% |
| Talbot County, MD | 538 | 0.7% | | 0.0% | | 0.0% |
| Philadelphia County, PA | | | 392 | 0.6% | 6,765 | 2.8% |
| Kent County, MD | | | 373 | 0.6% | | |
| Queen Anne's County, MD | | | 272 | 0.4% | | |
| Cecil County, MD | | | 269 | 0.4% | 4,425 | 1.8% |
| Baltimore County, MD | | | 255 | 0.4% | | |
| Delaware County, PA | | | | | 8,406 | 3.5% |
| Chester County, PA | | | | | 7,508 | 3.1% |
| Montgomery County, PA | | | | | 2,741 | 1.1% |
| Salem County, NJ | | | | | 1,556 | 0.6% |
| Gloucester County, NJ | | | | | 1,117 | 0.5% |
| All other locations | 5,367 | 7.1% | 4,504 | 7.0% | 13,890 | 5.7% |
| Total | 75,860 | 100.0% | 64,795 | 100.0% | 241,927 | 100.0% |

Source: U.S. Census Bureau, On The Map

| Place of Residence | Sussex County, DE | |
|-----------------------|-------------------|------------------|
| Place of Work by City | # of Workers | Share of Workers |
| Seaford City, DE | 4,918 | 6.5% |
| Georgetown, DE | 4,623 | 6.1% |
| Milford City, DE | 3,321 | 4.4% |
| Lewes City, DE | 3,289 | 4.3% |
| Dover City, DE | 3,069 | 4.0% |
| Sailsbury City, MD | 2,518 | 3.3% |
| Millsboro town, DE | 1,837 | 2.4% |
| Rehoboth Beach, DE | 1,742 | 2.3% |
| Selbyville town, DE | 1,647 | 2.2% |
| Wilmington City, DE | 1,409 | 1.9% |
| Camden town, DE | | 0.0% |
| Middletown, DE | | 0.0% |
| Harrington City, DE | | 0.0% |
| All other locations | 47,487 | 62.6% |
| Total | 75,860 | 100.0% |

Source: U.S. Census Bureau, On The Map

Mode of Commute to Work

Select Jurisdictions

| Mode | Sussex County | Delaware |
|-----------------------|----------------------|-----------------|
| Drove alone | 81,460 | 353,445 |
| Carpooled | 7,536 | 30,680 |
| Public Transportation | 414 | 9,598 |
| Bicycled | 292 | 1,566 |
| Walked | 725 | 9,566 |
| Other | 1,190 | 3,698 |
| Worked at Home | 6,570 | 22,227 |
| Total | 98,187 | 430,780 |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25024

| Share of Total | Sussex County | Delaware |
|-----------------------|----------------------|-----------------|
| Drove alone | 82.96% | 82.05% |
| Carpooled | 7.68% | 7.12% |
| Public Transportation | 0.42% | 2.23% |
| Bicycled | 0.30% | 0.36% |
| Walked | 0.74% | 2.22% |
| Other | 1.21% | 0.86% |
| Worked at Home | 6.69% | 5.16% |
| Total | 100.00% | 100.00% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B08006

Housing Units

Select Jurisdictions

| Housing Units | | | | | | | | | | Pct. Change | Pct. Change |
|-----------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-------------|-------------|
| | 2000 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2000-2010 | 2010-2017 |
| Sussex County, DE | 93,070 | 123,036 | 124,869 | 126,330 | 128,219 | 130,595 | 132,813 | 135,236 | 138,002 | 32.2% | 12.2% |
| Kent County, DE | 50,481 | 65,338 | 66,273 | 66,871 | 67,653 | 68,467 | 69,395 | 70,403 | 71,620 | 29.4% | 9.6% |
| New Castle County, DE | 199,521 | 217,511 | 217,794 | 217,989 | 218,686 | 219,608 | 220,950 | 222,097 | 223,250 | 9.0% | 2.6% |
| Delaware | 343,072 | 405,885 | 408,936 | 411,190 | 414,558 | 418,670 | 423,158 | 427,736 | 432,872 | 18.3% | 6.6% |
| Caroline County, MD | 12,028 | 13,482 | 13,527 | 13,527 | 13,527 | 13,539 | 13,543 | 13,558 | 13,626 | 12.1% | 1.1% |
| Dorchester County, MD | 14,681 | 16,554 | 16,678 | 16,690 | 16,731 | 16,725 | 16,712 | 16,708 | 16,766 | 12.8% | 1.3% |
| Wicomico County, MD | 34,401 | 41,192 | 41,287 | 41,313 | 41,557 | 42,172 | 42,251 | 42,301 | 42,417 | 19.7% | 3.0% |
| Worcester County, MD | 47,360 | 55,749 | 55,764 | 55,798 | 55,812 | 55,858 | 55,962 | 56,133 | 56,327 | 17.7% | 1.0% |

Source: Annual Estimates of Housing Units for the United States, Regions, Divisions, States, and Counties: April 1, 2010 to July 1, 2017

| Housing Units Projections | | | | | | | | | | Pct. Change |
|---------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-------------|
| | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | 2050 | 2010-2050 |
| Sussex County, DE | 123,036 | 131,435 | 139,735 | 148,390 | 155,226 | 159,956 | 162,984 | 164,727 | 166,226 | 26.5% |
| Kent County, DE | 65,338 | 68,693 | 73,198 | 77,681 | 81,643 | 85,026 | 87,824 | 90,190 | 92,275 | 34.3% |
| New Castle County, DE | 217,511 | 221,606 | 229,117 | 238,583 | 245,907 | 251,493 | 254,853 | 256,448 | 255,933 | 15.5% |
| Delaware | 405,885 | 421,734 | 442,050 | 464,654 | 482,776 | 496,475 | 505,661 | 511,365 | 514,434 | 22.0% |

Source: The Delaware Population Consortium Seasonal Population Projections 2020-2050

Housing Tenure
Sussex County, DE

| Tenure | 2010 | | 2012 | | 2017 | | 2012-2017 | |
|-----------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|
| | No. | Pct. | No. | Pct. | No. | Pct. | Change | Pct. Change |
| Renter-Occupied | 14,725 | 16.6% | 17,940 | 23.0% | 15,893 | 18.1% | -2,047 | -11.4% |
| Owner-Occupied | 74,029 | 83.4% | 60,055 | 77.0% | 72,136 | 81.9% | 12,081 | 20.1% |
| Total Occupied Units | 88,754 | 100.0% | 77,995 | 100.0% | 88,029 | 100.0% | 10,034 | 12.9% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25003

| Tenure | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|-----------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Renter-Occupied | 15,520 | 13,975 | 17,287 | 17,454 | 13,915 | 14,725 | 14,826 | 17,940 | 17,432 | 19,492 | 18,628 | 17,304 | 15,893 |
| Owner-Occupied | 55,134 | 59,422 | 57,428 | 57,092 | 59,092 | 74,029 | 59,379 | 60,055 | 60,419 | 66,777 | 68,677 | 65,547 | 72,136 |
| Total Occupied Units | 70,654 | 73,397 | 74,715 | 74,546 | 73,007 | 88,754 | 74,205 | 77,995 | 77,851 | 86,269 | 87,305 | 82,851 | 88,029 |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25003

| Tenure Share | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|-----------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Renter-Occupied | 22.0% | 19.0% | 23.1% | 23.4% | 19.1% | 16.6% | 20.0% | 23.0% | 22.4% | 22.6% | 21.3% | 20.9% | 18.1% |
| Owner-Occupied | 78.0% | 81.0% | 76.9% | 76.6% | 80.9% | 83.4% | 80.0% | 77.0% | 77.6% | 77.4% | 78.7% | 79.1% | 81.9% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25003

Housing Type
Sussex County, DE

| Type | 2010 | | 2012 | | 2017 | | 2012-2017 | |
|--|----------------|---------------|----------------|---------------|----------------|---------------|---------------|-------------|
| | No. | Pct. | No. | Pct. | No. | Pct. | Change | Pct. Change |
| Single-Family Detached | 76,069 | 61.7% | 77,989 | 62.0% | 90,114 | 65.3% | 12,125 | 15.5% |
| Single-Family Attached/Townhomes* | 10,794 | 8.7% | 11,203 | 8.9% | 16,042 | 11.6% | 4,839 | 43.2% |
| Small Multifamily (3-19 unit building) | 9,022 | 7.3% | 10,012 | 8.0% | 10,020 | 7.3% | 8 | 0.1% |
| Large Multifamily (20+ unit buildings) | 2,774 | 2.2% | 3,749 | 3.0% | 3,803 | 2.8% | 54 | 1.4% |
| Other (RV, mobile home, boat, etc.)* | 24,714 | 20.0% | 22,747 | 18.1% | 18,030 | 13.1% | -4,717 | -20.7% |
| Total Units | 123,373 | 100.0% | 125,700 | 100.0% | 138,009 | 100.0% | 12,309 | 9.8% |

*Includes attached homes and duplexes

*Mobile homes had a +/-2,368 margin of error for 2017

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25024

Housing Units by Gross Rent

Renter-Occupied Units

Sussex County, DE

| Gross Rent | 2010 | | 2012 | | 2017 | | 2012-2017 | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | No. | Pct. | No. | Pct. | No. | Pct. | Change | Pct. Change |
| <\$500 | 1,991 | 13.5% | 2,616 | 14.6% | 2,039 | 12.8% | -577 | -22.1% |
| \$500-\$749 | 2,519 | 17.1% | 3,068 | 17.1% | 2,355 | 14.8% | -713 | -23.2% |
| \$750-999 | 3,226 | 21.9% | 4,797 | 26.7% | 3,163 | 19.9% | -1,634 | -34.1% |
| Other (RV, mobile home, boat, etc.)* | 2,820 | 19.2% | 2,681 | 14.9% | 3,219 | 20.3% | 538 | 20.1% |
| \$1,250-1,499 | 1,291 | 8.8% | 1,453 | 8.1% | 1,947 | 12.3% | 494 | 34.0% |
| \$1,500-1,999 | 937 | 6.4% | 1,446 | 8.1% | 1,557 | 9.8% | 111 | 7.7% |
| \$2,000+ | 203 | 1.4% | 181 | 1.0% | 379 | 2.4% | 198 | 109.4% |
| Occupied without Cash Rent | 1,738 | 11.8% | 1,698 | 9.5% | 1,234 | 7.8% | -464 | -27.3% |
| Total Renter-Occupied Housing Units | 14,725 | 100.0% | 17,940 | 100.0% | 15,893 | 100.0% | -2,047 | -11.4% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25063

Housing Units by Home Value

Owner-Occupied Units

Sussex County, DE

| Home Value | 2010 | | 2012 | | 2017 | | 2012-2017 | |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|
| | No. | Pct. | No. | Pct. | No. | Pct. | Change | Pct. Change |
| <\$100,000 | 9,687 | 16.3% | 9,586 | 17.1% | 7,481 | 10.4% | -2,105 | -22.0% |
| \$100,000-199,999 | 12,416 | 20.9% | 11,626 | 20.7% | 13,584 | 18.8% | 1,958 | 16.8% |
| \$200,000-299,999 | 15,319 | 25.8% | 16,797 | 29.9% | 19,276 | 26.7% | 2,479 | 14.8% |
| Other (RV, mobile home, boat, etc.)* | 10,257 | 17.3% | 8,745 | 15.6% | 12,832 | 17.8% | 4,087 | 46.7% |
| \$400,000-499,999 | 4,100 | 6.9% | 4,108 | 7.3% | 8,321 | 11.5% | 4,213 | 102.6% |
| \$500,000-\$999,999 | 5,487 | 9.3% | 3,920 | 7.0% | 8,095 | 11.2% | 4,175 | 106.5% |
| \$1,000,000+ | 2,038 | 3.4% | 1,406 | 2.5% | 2,547 | 3.5% | 1,141 | 81.2% |
| Total Owner-Occupied Housing Units | 59,304 | 100.0% | 56,188 | 100.0% | 72,136 | 100.0% | 15,948 | 28.4% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25075

Approved Building Permits

Sussex County, DE

| | | | | | | | | Pct. Change |
|---------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------------|
| Housing Type | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2012 - 2018 |
| Single-Family Units | 1,746 | 2,138 | 2,085 | 2,169 | 2,399 | 2,727 | 3,834 | 17,098 |
| Multi-Family Units | 258 | 336 | 210 | 260 | 399 | 451 | 221 | 2,135 |
| Total Units | 2,004 | 2,474 | 2,295 | 2,429 | 2,798 | 3,178 | 4,055 | 19,233 |

Source: Delaware State Housing Authority, Housing Production Report, Delaware Building Permits, Sussex County (CY 2018)

Housing Units by Year Built, 2017

Select Jurisdictions

| Year Built | Sussex County, DE | Kent County, DE | New Castle County, DE | Delaware |
|-------------------------------------|----------------------|--------------------|--------------------------|----------------|
| 2014 or Later | 9,345 | 3,292 | 5,630 | 18,267 |
| 2010 to 2013 | 10,677 | 4,043 | 4,779 | 19,499 |
| 2000 to 2009 | 42,012 | 16,945 | 23,329 | 82,286 |
| 1990 to 1999 | 21,915 | 13,032 | 28,855 | 63,802 |
| 1980 to 1989 | 19,337 | 10,169 | 26,995 | 56,501 |
| Other (RV, mobile home, boat, etc.) | 13,738 | 9,495 | 30,288 | 53,521 |
| 1960 to 1969 | 6,250 | 3,923 | 31,239 | 41,412 |
| 1950 to 1959 | 5,519 | 4,204 | 31,677 | 41,400 |
| 1940 to 1949 | 3,065 | 2,719 | 15,909 | 21,693 |
| Before 1940 | 6,151 | 3,797 | 24,524 | 34,472 |
| Total Housing Units | 138,009 | 71,619 | 223,225 | 432,853 |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25034

Share of Total

| Year Built | Sussex County, DE | Kent County, DE | New Castle County, DE | Delaware |
|----------------------------|----------------------|--------------------|--------------------------|---------------|
| 2014 or Later | 6.8% | 4.6% | 2.5% | 4.2% |
| 2010 to 2013 | 7.7% | 5.6% | 2.1% | 4.5% |
| 2000 to 2009 | 30.4% | 23.7% | 10.5% | 19.0% |
| 1990 to 1999 | 15.9% | 18.2% | 12.9% | 14.7% |
| 1980 to 1989 | 14.0% | 14.2% | 12.1% | 13.1% |
| 1970 to 1979 | 10.0% | 13.3% | 13.6% | 12.4% |
| 1960 to 1969 | 4.5% | 5.5% | 14.0% | 9.6% |
| 1950 to 1959 | 4.0% | 5.9% | 14.2% | 9.6% |
| 1940 to 1949 | 2.2% | 3.8% | 7.1% | 5.0% |
| Before 1940 | 4.5% | 5.3% | 11.0% | 8.0% |
| Total Housing Units | 100.0% | 100.0% | 100.0% | 100.0% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25034

Vacancy Housing Units

Sussex County, DE

| Vacant Housing Units | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| For rent | 1,850 | 1,318 | 1,427 | 1,045 | 1,681 | 1,974 | 933 | 1,762 | 2,323 | 1,316 | 1,396 | 1,095 | 761 |
| Rented, not occupied | 399 | 380 | 204 | 582 | 417 | 439 | 85 | 154 | 237 | 60 | 53 | 131 | 28 |
| For sale only | 2,291 | 2,921 | 3,524 | 3,321 | 3,727 | 3,988 | 3,054 | 3,426 | 1,888 | 1,902 | 2,093 | 2,056 | 2,297 |
| Sold, not occupied | 125 | 710 | 687 | 392 | 739 | 188 | 476 | 547 | 187 | 444 | 204 | 162 | 413 |
| Seasonal | 29,342 | 29,832 | 31,431 | 33,660 | 35,685 | 38,614 | 40,467 | 37,554 | 39,267 | 36,565 | 36,518 | 42,732 | 41,783 |
| Migrant Worker | - | - | 125 | - | 55 | 251 | 296 | 293 | - | 72 | - | - | - |
| Other | 2,458 | 3,048 | 2,427 | 3,036 | 3,075 | 3,890 | 5,586 | 3,969 | 4,822 | 3,820 | 3,866 | 4,394 | 4,698 |
| Total | 36,465 | 38,209 | 39,825 | 42,036 | 45,379 | 49,344 | 50,897 | 47,705 | 48,724 | 44,179 | 44,130 | 50,570 | 49,980 |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25024

Share of Total

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| For rent | 5.1% | 3.4% | 3.6% | 2.5% | 3.7% | 4.0% | 1.8% | 3.7% | 4.8% | 3.0% | 3.2% | 2.2% | 1.5% |
| Rented, not occupied | 1.1% | 1.0% | 0.5% | 1.4% | 0.9% | 0.9% | 0.2% | 0.3% | 0.5% | 0.1% | 0.1% | 0.3% | 0.1% |
| For sale only | 6.3% | 7.6% | 8.8% | 7.9% | 8.2% | 8.1% | 6.0% | 7.2% | 3.9% | 4.3% | 4.7% | 4.1% | 4.6% |
| Sold, not occupied | 0.3% | 1.9% | 1.7% | 0.9% | 1.6% | 0.4% | 0.9% | 1.1% | 0.4% | 1.0% | 0.5% | 0.3% | 0.8% |
| Seasonal | 80.5% | 78.1% | 78.9% | 80.1% | 78.6% | 78.3% | 79.5% | 78.7% | 80.6% | 82.8% | 82.8% | 84.5% | 83.6% |
| Migrant | 0.0% | 0.0% | 0.3% | 0.0% | 0.1% | 0.5% | 0.6% | 0.6% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% |
| Other | 6.7% | 8.0% | 6.1% | 7.2% | 6.8% | 7.9% | 11.0% | 8.3% | 9.9% | 8.6% | 8.8% | 8.7% | 9.4% |
| Total | 100.0% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25004

Seasonal Population Projections For Housing Units

Sussex County, DE

| Vacant Unit Projections | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | 2050 |
|--------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Rent/Sale | 5,514 | 3,489 | 3,709 | 3,939 | 4,121 | 4,246 | 4,326 | 4,373 | 4,413 |
| Seasonal | 34,770 | 36,518 | 38,824 | 41,229 | 43,128 | 44,442 | 45,283 | 45,768 | 46,184 |
| Other | 3,384 | 4,123 | 4,383 | 4,655 | 4,869 | 5,018 | 5,113 | 5,167 | 5,214 |
| Total | 43,668 | 44,130 | 46,916 | 49,823 | 52,118 | 53,706 | 54,722 | 55,308 | 55,811 |

Source: The Delaware Population Consortium Seasonal Population Projections 2020-2050

| Share of Total | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | 2050 |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Rent/Sale | 4.6% | 4.6% | 4.3% | 4.1% | 3.9% | 3.8% | 3.7% | 3.7% | 3.7% |
| Seasonal | 79.6% | 82.8% | 82.8% | 82.8% | 82.8% | 82.8% | 82.8% | 82.8% | 82.8% |
| Other | 7.7% | 9.3% | 9.3% | 9.3% | 9.3% | 9.3% | 9.3% | 9.3% | 9.3% |
| Total | 100.0% |

Source: The Delaware Population Consortium Seasonal Population Projections 2020-2050

| Housing Vacant Units Projections | 2010 | 2015 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | 2050 | Pct. Change |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------------|
| | | | | | | | | | | 2010-2050 |
| Sussex County, DE | 43,668 | 44,130 | 46,917 | 49,823 | 52,118 | 53,706 | 54,723 | 55,308 | 55,811 | 26.5% |
| Kent County, DE | 5,060 | 6,216 | 5,669 | 6,016 | 6,323 | 6,585 | 6,801 | 6,985 | 7,146 | 15.0% |
| New Castle County, DE | 14,860 | 18,793 | 15,653 | 16,300 | 16,800 | 17,182 | 17,411 | 17,520 | 17,485 | -7.0% |
| Delaware | 63,588 | 69,139 | 68,239 | 72,139 | 75,241 | 77,473 | 78,935 | 79,813 | 80,442 | 16.3% |

Source: The Delaware Population Consortium Seasonal Population Projections 2020-2050

| Housing Units | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | 2050 |
|-------------------------|---------------|---------------|----------------|----------------|----------------|----------------|----------------|
| Housing Units | 139,735 | 148,390 | 155,226 | 159,956 | 162,984 | 164,727 | 166,226 |
| Vacant Housing Units | 46,917 | 49,823 | 52,118 | 53,706 | 54,723 | 55,308 | 55,811 |
| Total Households | 92,818 | 98,567 | 103,108 | 106,250 | 108,261 | 109,419 | 110,415 |

Source: The Delaware Population Consortium Seasonal Population Projections 2020-2050

Renter Households by Housing Type

Sussex County, DE

| Renter Household Type | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Married-Couple Family | 4,287 | 3,356 | 5,016 | 5,224 | 3,936 | 3,454 | 3,211 | 4,573 | 5,572 | 6,248 | 5,448 | 4,780 | 4,913 |
| Other Family* | 5,087 | 4,839 | 5,777 | 5,467 | 3,953 | 5,336 | 5,740 | 5,668 | 5,622 | 6,023 | 4,419 | 5,072 | 4,174 |
| Living Alone | 5,141 | 4,396 | 5,164 | 5,155 | 3,807 | 4,781 | 4,255 | 6,511 | 4,269 | 6,375 | 7,734 | 6,070 | 4,877 |
| Nonfamily Household | 1,005 | 1,384 | 1,330 | 1,608 | 2,219 | 1,154 | 1,620 | 1,188 | 1,969 | 846 | 1,027 | 1,382 | 1,929 |
| Total Units | 15,520 | 13,975 | 17,287 | 17,454 | 13,915 | 14,725 | 14,826 | 17,940 | 17,432 | 19,492 | 18,628 | 17,304 | 15,893 |

*Other Family has no spouse present

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25011

| Source: U.S. Census Bureau | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Married-Couple Family | 27.6% | 24.0% | 29.0% | 29.9% | 28.3% | 23.5% | 21.7% | 25.5% | 32.0% | 32.1% | 29.2% | 27.6% | 30.9% |
| Other Family | 32.8% | 34.6% | 33.4% | 31.3% | 28.4% | 36.2% | 38.7% | 31.6% | 32.3% | 30.9% | 23.7% | 29.3% | 26.3% |
| Living Alone | 33.1% | 31.5% | 29.9% | 29.5% | 27.4% | 32.5% | 28.7% | 36.3% | 24.5% | 32.7% | 41.5% | 35.1% | 30.7% |
| Nonfamily Household | 6.5% | 9.9% | 7.7% | 9.2% | 15.9% | 7.8% | 10.9% | 6.6% | 11.3% | 4.3% | 5.5% | 8.0% | 12.1% |
| Total Units | 100% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25011

Owner Households by Housing Type

Sussex County, DE

| Owner Household Type | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Married-Couple Family | 31,708 | 34,489 | 33,620 | 31,739 | 34,645 | 34,362 | 33,362 | 34,065 | 35,279 | 37,973 | 40,661 | 39,306 | 45,997 |
| Other Family* | 6,747 | 6,831 | 7,573 | 7,569 | 5,706 | 7,378 | 7,702 | 6,821 | 7,767 | 9,753 | 7,604 | 6,970 | 6,784 |
| Living Alone | 14,021 | 14,454 | 13,542 | 13,976 | 15,506 | 14,513 | 15,319 | 16,005 | 14,127 | 16,149 | 16,553 | 16,273 | 16,627 |
| Nonfamily Household | 2,658 | 3,648 | 2,693 | 3,808 | 3,235 | 3,051 | 2,996 | 3,164 | 3,246 | 2,902 | 3,859 | 2,998 | 2,728 |
| Total Units | 55,134 | 59,422 | 57,428 | 57,092 | 59,092 | 59,304 | 59,379 | 60,055 | 60,419 | 66,777 | 68,677 | 65,547 | 72,136 |

*Other Family has no spouse present

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25011

| Source: U.S. Census Bureau | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Married-Couple Family | 57.5% | 58.0% | 58.5% | 55.6% | 58.6% | 57.9% | 56.2% | 56.7% | 58.4% | 56.9% | 59.2% | 60.0% | 63.8% |
| Other Family | 12.2% | 11.5% | 13.2% | 13.3% | 9.7% | 12.4% | 13.0% | 11.4% | 12.9% | 14.6% | 11.1% | 10.6% | 9.4% |
| Living Alone | 25.4% | 24.3% | 23.6% | 24.5% | 26.2% | 24.5% | 25.8% | 26.7% | 23.4% | 24.2% | 24.1% | 24.8% | 23.0% |
| Nonfamily Household | 4.8% | 6.1% | 4.7% | 6.7% | 5.5% | 5.1% | 5.0% | 5.3% | 5.4% | 4.3% | 5.6% | 4.6% | 3.8% |
| Total Units | 100% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25011

Tenure by Household Type

Sussex County, DE

| Household Type | Renters | | Owners | | Total | | |
|-----------------------|---------------|---------------|---------------|---------------|---------------|--------------|--------------|
| | No. | % | No. | % | No. | % Renters | % Owners |
| Married-Couple Family | 4,913 | 30.9% | 45,997 | 63.8% | 50,910 | 9.7% | 90.3% |
| Other Family* | 4,174 | 26.3% | 6,784 | 9.4% | 10,958 | 38.1% | 61.9% |
| Living Alone | 4,877 | 30.7% | 16,627 | 23.0% | 21,504 | 22.7% | 77.3% |
| Nonfamily Household | 1,929 | 12.1% | 2,728 | 3.8% | 4,657 | 41.4% | 58.6% |
| Total Units | 15,893 | 100.0% | 72,136 | 100.0% | 88,030 | 18.1% | 81.9% |

*Other Family has no spouse present

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25011

Tenure by Age of Householder
Sussex County, DE

| | 2012 | | 2017 | | 2012-2017 | |
|-------------------------|---------------|---------------|---------------|---------------|---------------|--------------|
| | No. | Pct. | No. | Pct. | Change | Pct. Change |
| Owner Occupied | | | | | | |
| < 25 Years | 200 | 0.3% | 425 | 0.6% | 225 | 112.5% |
| 25-34 | 3,855 | 6.4% | 5,001 | 6.9% | 1,146 | 29.7% |
| 35-44 | 5,510 | 9.2% | 6,998 | 9.7% | 1,488 | 27.0% |
| 45-54 | 11,443 | 19.1% | 11,006 | 15.3% | -437 | -3.8% |
| 55-59 | 7,609 | 12.7% | 6,771 | 9.4% | -838 | -11.0% |
| 60-64 | 6,962 | 11.6% | 10,383 | 14.4% | 3,421 | 49.1% |
| 65-74 | 14,953 | 24.9% | 19,235 | 26.7% | 4,282 | 28.6% |
| 75-84 | 7,287 | 12.1% | 9,557 | 13.2% | 2,270 | 31.2% |
| 85+ | 2,236 | 3.7% | 2,760 | 3.8% | 524 | 23.4% |
| Total Homeowners | 60,055 | 100.0% | 72,136 | 100.0% | 12,081 | 20.1% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25007

| | 2012 | | 2017 | | 2012-2017 | |
|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | No. | Pct. | No. | Pct. | Change | Pct. Change |
| Renter Occupied | | | | | | |
| < 25 Years | 756 | 4.2% | 570 | 3.6% | -186 | -24.6% |
| 25-34 | 3,644 | 20.3% | 4,689 | 29.5% | 1,045 | 28.7% |
| 35-44 | 4,291 | 23.9% | 3,848 | 24.2% | -443 | -10.3% |
| 45-54 | 3,171 | 17.7% | 1,234 | 7.8% | -1,937 | -61.1% |
| 55-59 | 1,386 | 7.7% | 1,246 | 7.8% | -140 | -10.1% |
| 60-64 | 971 | 5.4% | 1,134 | 7.1% | 163 | 16.8% |
| 65-74 | 1,889 | 10.5% | 1,294 | 8.1% | -595 | -31.5% |
| 75-84 | 1,081 | 6.0% | 1,106 | 7.0% | 25 | 2.3% |
| 85+ | 751 | 4.2% | 772 | 4.9% | 21 | 2.8% |
| Total Renters | 17,940 | 100.0% | 15,893 | 100.0% | -2,047 | -11.4% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25007

| Share of Homeowners by Age Group | Total Households | % Homeowners in 2012 | % Homeowners (2017) |
|----------------------------------|------------------|----------------------|---------------------|
| < 25 Years | 995 | 20.9% | 42.7% |
| 25-34 | 9,690 | 51.4% | 51.6% |
| 35-44 | 10,846 | 56.2% | 64.5% |
| 45-54 | 12,240 | 78.3% | 89.9% |
| 55-59 | 8,017 | 84.6% | 84.5% |
| 60-64 | 11,517 | 87.8% | 90.2% |
| 65-74 | 20,529 | 88.8% | 93.7% |
| 75-84 | 10,663 | 87.1% | 89.6% |
| 85+ | 3,532 | 74.9% | 78.1% |
| Total Homeowners | 88,029 | 77.0% | 81.9% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25007

Delaware Annual Foreclosure Filings

Select Jurisdictions

| Select Jurisdictions | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Kent County, DE | 785 | 1,115 | 1,160 | 809 | 261 | 535 | 646 | 466 | 630 | 541 | 534 |
| New Castle County, DE | 2,725 | 3,627 | 3,775 | 3,137 | 730 | 1,484 | 1,562 | 1,249 | 1,758 | 1,597 | 1,384 |
| Sussex County, DE | 978 | 1,415 | 1,522 | 1,166 | 285 | 572 | 680 | 485 | 627 | 542 | 541 |
| Total | 4,488 | 6,157 | 6,457 | 5,112 | 1,276 | 2,591 | 2,888 | 2,200 | 3,015 | 2,680 | 2,459 |

Source: Delaware State Housing Authority, Delaware Annual Foreclosure Filings (2008 - 2018 Year to Date)

Housing Costs as a Percent of Household Income

Owner Households

Sussex County, DE

| Owner Households | 2012 | 2017 |
|-------------------------------|---------------|---------------|
| <30% | 36,359 | 53,351 |
| 30-49% | 9,812 | 9,964 |
| 50%+ | 8,230 | 8,297 |
| Total Owner Households | 54,401 | 71,612 |

*added housing units with a mortgage and without mortgage

*did not include 524 units for 2017 and 536 units for 2012 listed as 'Not computed'

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25087

| Share of Owner Households | 2012 | 2017 |
|----------------------------------|---------------|---------------|
| <30% | 66.8% | 74.5% |
| 30-49% | 18.0% | 13.9% |
| 50%+ | 15.1% | 11.6% |
| Total Owner Households | 100.0% | 100.0% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25087

Housing Costs as a Percent of Household Income

Renter Households

Sussex County, DE

| Renter Households | 2012 | 2017 |
|--------------------------------|---------------|---------------|
| <30% | 7,756 | 7,629 |
| 30-49% | 4,287 | 3,721 |
| 50%+ | 3,947 | 3,170 |
| Total Renter Households | 15,990 | 14,520 |

*did not include 1373 units for 2017 and 1950 units for 2012 listed as 'Not computed'

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25070

| Share of Renter Households | 2012 | 2017 |
|-----------------------------------|---------------|---------------|
| <30% | 48.5% | 52.5% |
| 30-49% | 26.8% | 25.6% |
| 50%+ | 24.7% | 21.8% |
| Total Renter Households | 100.0% | 100.0% |

Source: U.S. Census Bureau, 1-Year American Community Survey, Table B25070

Housing Costs as a Percent of Household Income by Household Income, 2012-2017 (2017 \$s)

All Households

Sussex County, DE

| All Households Household Income | Total Households | | <30% | | 30-49% | | 50%+ | |
|------------------------------------|------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | No. | % | No. | % | No. | % | No. | % |
| Less than \$20,000 | 9,783 | 11.7% | 2,023 | 3.4% | 1,731 | 12.8% | 6,029 | 56.5% |
| \$20,000 to 34,999 | 12,258 | 14.7% | 5,451 | 9.2% | 3,774 | 28.0% | 3,033 | 28.4% |
| \$35,000 to 49,999 | 12,752 | 15.3% | 8,026 | 13.6% | 3,673 | 27.2% | 1,053 | 9.9% |
| Other (RV, mobile home, k | 16,790 | 20.1% | 13,359 | 22.6% | 2,984 | 22.1% | 447 | 4.2% |
| \$75,000 to 99,999 | 11,999 | 14.4% | 10,980 | 18.5% | 907 | 6.7% | 112 | 1.0% |
| \$100,000 or more | 19,804 | 23.7% | 19,380 | 32.7% | 418 | 3.1% | 6 | 0.1% |
| Total Households | 83,386 | 100.0% | 59,219 | 100.0% | 13,487 | 100.0% | 10,680 | 100.0% |

*An estimated 2936 is not computed

Source: U.S. Census Bureau, 5-Year American Community Survey, Tables B25074 and B25095

Homeownership Rate by Race

Select Jurisdictions

| Race/Ethnicity of Household Head | Sussex County, DE | Kent County, DE | New Castle County, DE |
|---|------------------------------|----------------------------|----------------------------------|
| White | 83.4% | 76.2% | 77.9% |
| Black | 57.4% | 54.7% | 51.3% |
| Asian | 71.9% | 64.7% | 55.9% |
| Other/2+ races | 68.8% | 53.6% | 54.9% |
| Hispanic | 50.6% | 53.1% | 43.4% |
| Total | 78.5% | 69.3% | 68.0% |
| Black-White Homeownership Gap | -26.0% | -21.5% | -26.6% |

Source: U.S. Census Bureau 5-year Public Use Microdata Sample

Cost Burden Among Renter Households

Select Jurisdictions

| Race/Ethnicity of Household Head | Sussex County, DE | | Kent County, DE | | New Castle County, DE | |
|---|--------------------------|---------------|------------------------|---------------|------------------------------|---------------|
| Severely cost burdened | 3,752 | 20.2% | 4,281 | 22.0% | 13,920 | 21.5% |
| Total cost burdened | 7,646 | 41.1% | 8,886 | 45.7% | 28,711 | 44.3% |
| Total renter households | 18,594 | 100.0% | 19,443 | 100.0% | 64,857 | 100.0% |

Source: U.S. Census Bureau 5-year Public Use Microdata Sample

Cost Burden Among Renter Households by Race/Ethnicity of Head of Household

Sussex County, DE

| Race/Ethnicity of Head of Household | Total Renter Household | Cost Burden Renters | Pct. Cost Burden |
|--|-------------------------------|----------------------------|-------------------------|
| White | 11,649 | 4,265 | 36.6% |
| Black | 3,890 | 1,638 | 42.1% |
| Asian | 216 | 47 | 21.8% |
| Other/2+ races | 389 | 185 | 47.6% |
| Hispanic | 2,450 | 1,511 | 61.7% |
| Total | 18,594 | 7,646 | 41.1% |

Source: U.S. Census Bureau 5-year Public Use Microdata Sample

Cost Burden Among Renter Households by Household Type

Sussex County, DE

| Household Type | Total Renter Household | Cost Burden Renters | Pct. Cost Burden |
|-----------------------------|-------------------------------|----------------------------|-------------------------|
| Married Couple w/ Kids | 2,903 | 1,216 | 41.9% |
| Married Couple w/o Kids | 2,857 | 491 | 17.2% |
| Other Family Households* | 5,140 | 2,687 | 52.3% |
| Living Alone | 5,953 | 2,706 | 45.5% |
| Other Non-Family Households | 1,741 | 546 | 31.4% |
| Total | 18,594 | 7,646 | 41.1% |

* Single Parents

Source: U.S. Census Bureau 5-year Public Use Microdata Sample

Cost Burden Among Renter Households by Age of Household Head

Sussex County, DE

| Age of Household Head | Total Renter Household | Cost Burden Renters | Pct. Cost Burden |
|------------------------------|-------------------------------|----------------------------|-------------------------|
| >25 | 938 | 197 | 21.0% |
| 25-34 | 4,824 | 2,200 | 45.6% |
| 35-44 | 3,922 | 2,082 | 53.1% |
| 45-54 | 2,994 | 944 | 31.5% |
| 55-64 | 2,230 | 679 | 30.4% |
| 65+ | 3,686 | 1,544 | 41.9% |
| Total | 18,594 | 7,646 | 41.1% |

Source: U.S. Census Bureau 5-year Public Use Microdata Sample