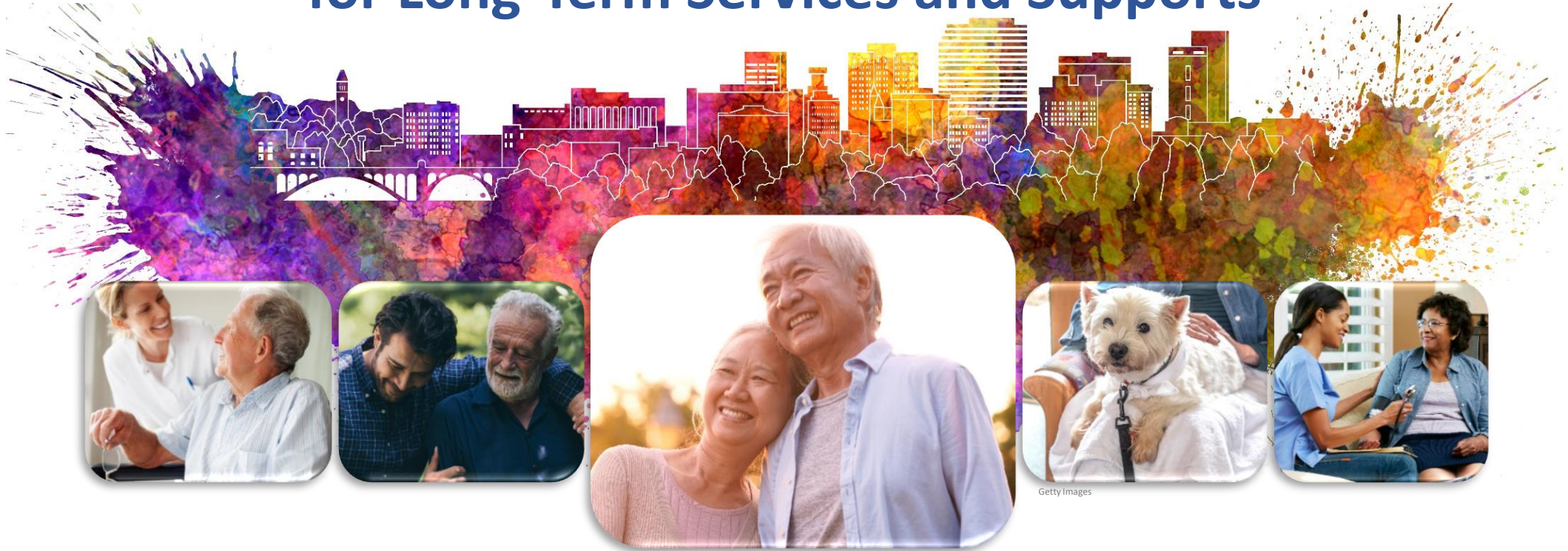


The Demographic Trends Impacting Need for Long-Term Services and Supports



David Mancuso, PhD

Senior Research Scientist, DSHS Research and Data Analysis Division

October 19, 2023

Overview

PART 1

Demographics Impacts of the Age Wave

PART 2

Forecasts of Dementia Prevalence Through 2040

PART 3

Food Insecurity and Housing Instability Among Seniors

APPENDIX

**LTSS Policy Innovations, Changes in Patterns of LTSS Use, and Rebalancing
Social Security and Medicare Data by County
Medicare Advantage Enrollment Trends
Maps of LTSS Facilities and Broadband Access
Trends in Adult Protective Services
Medicaid in Washington State
Oral Health and Older Adults**



Getty Images

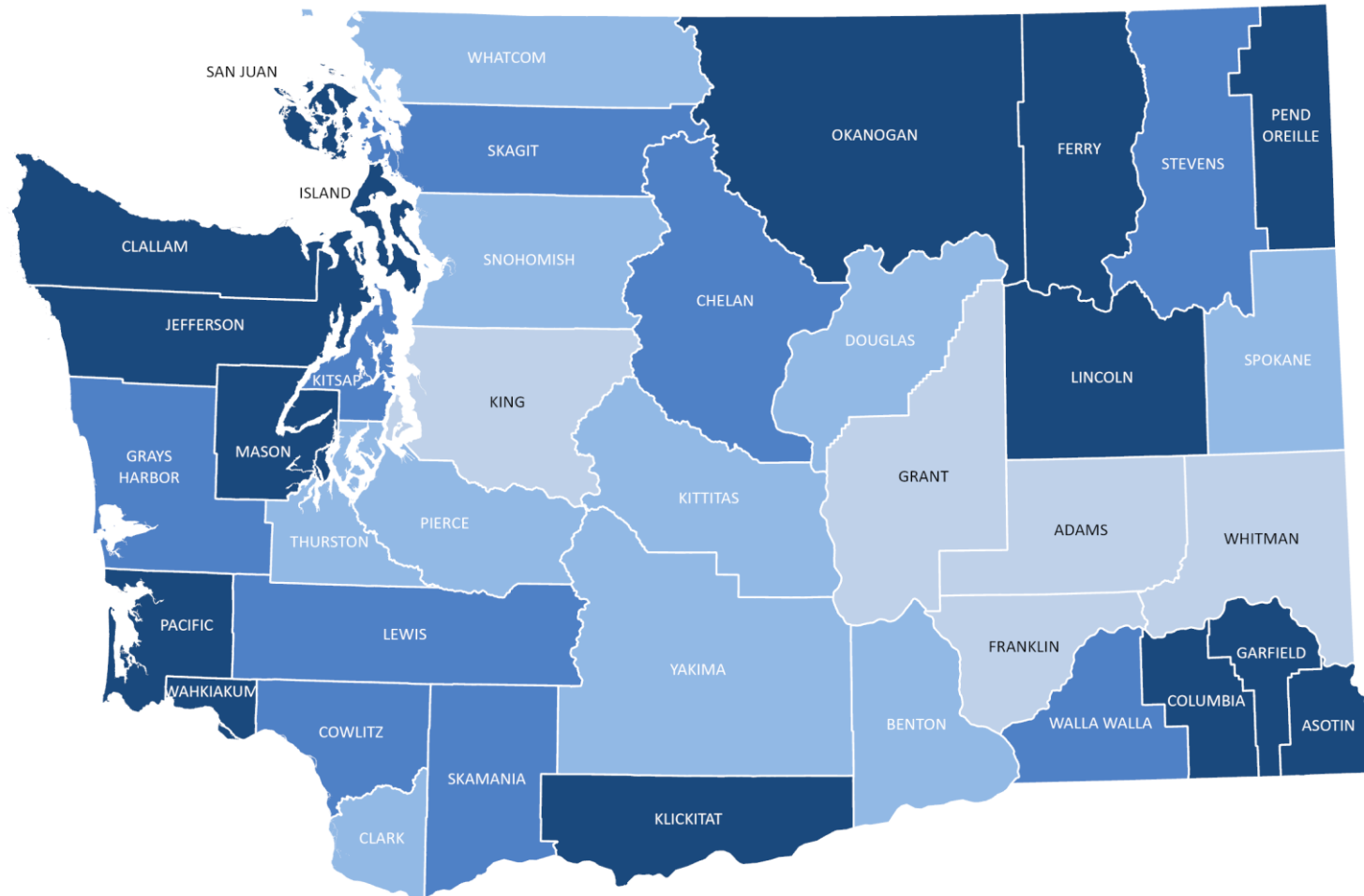
PART 1

The Impact of the Age Wave

Persons 65+ as a Percentage of the Total Population

2022

Estimates and Projections by County



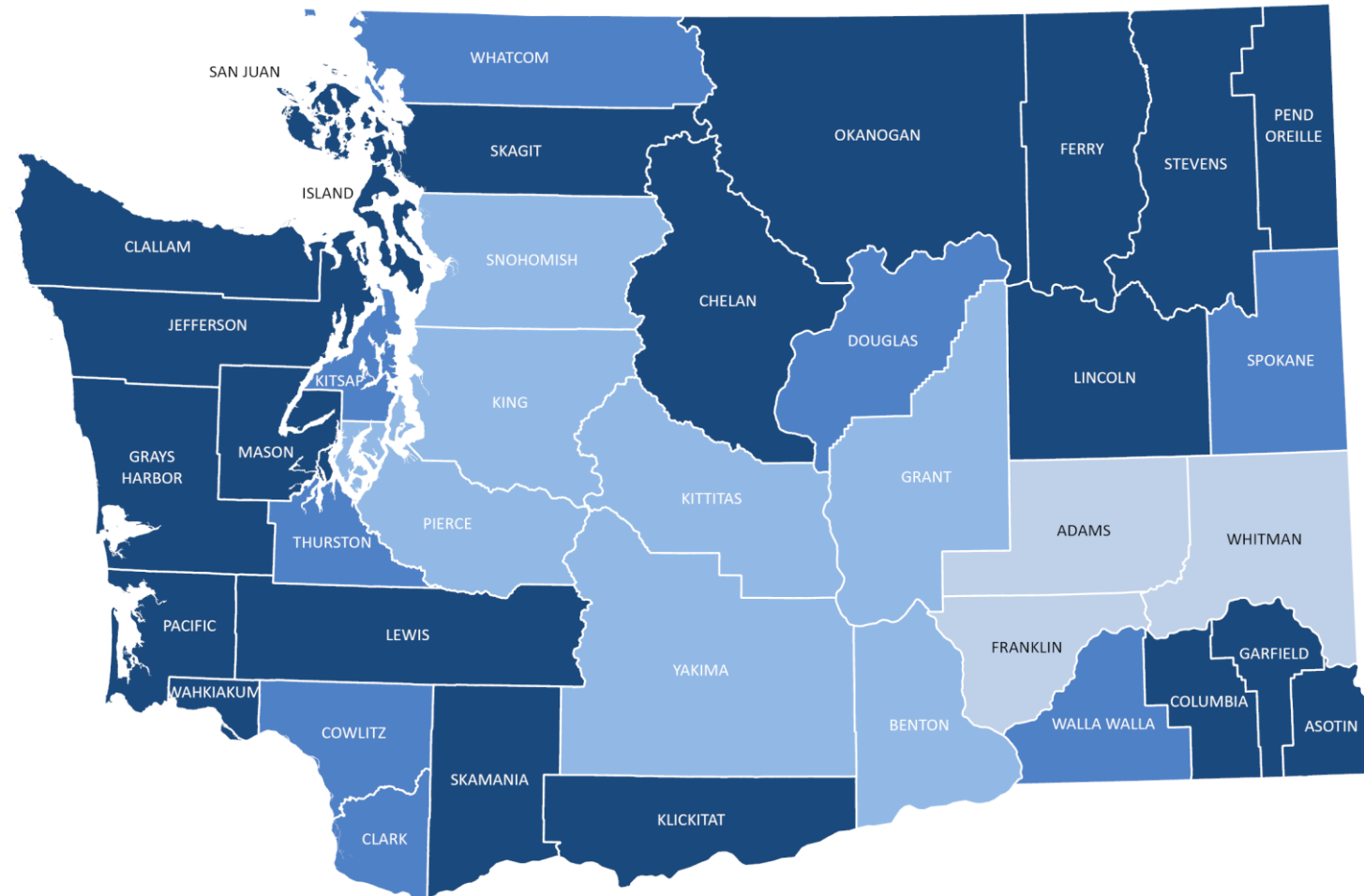
Less than 10%
 10.1% to 15%
 15.1% to 20%
 20.1% to 25%
 More than 25%

SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Projections of the Population Age 65 and Over for Growth Management, 20022 GMA Projections – Medium Series, Feb. 2023; Population Estimates by Age and Sex 2020, 2021, 2022 (Preliminary) accessed July 26th, 2023.

Persons 65+ as a Percentage of the Total Population

2030

Estimates and Projections by County



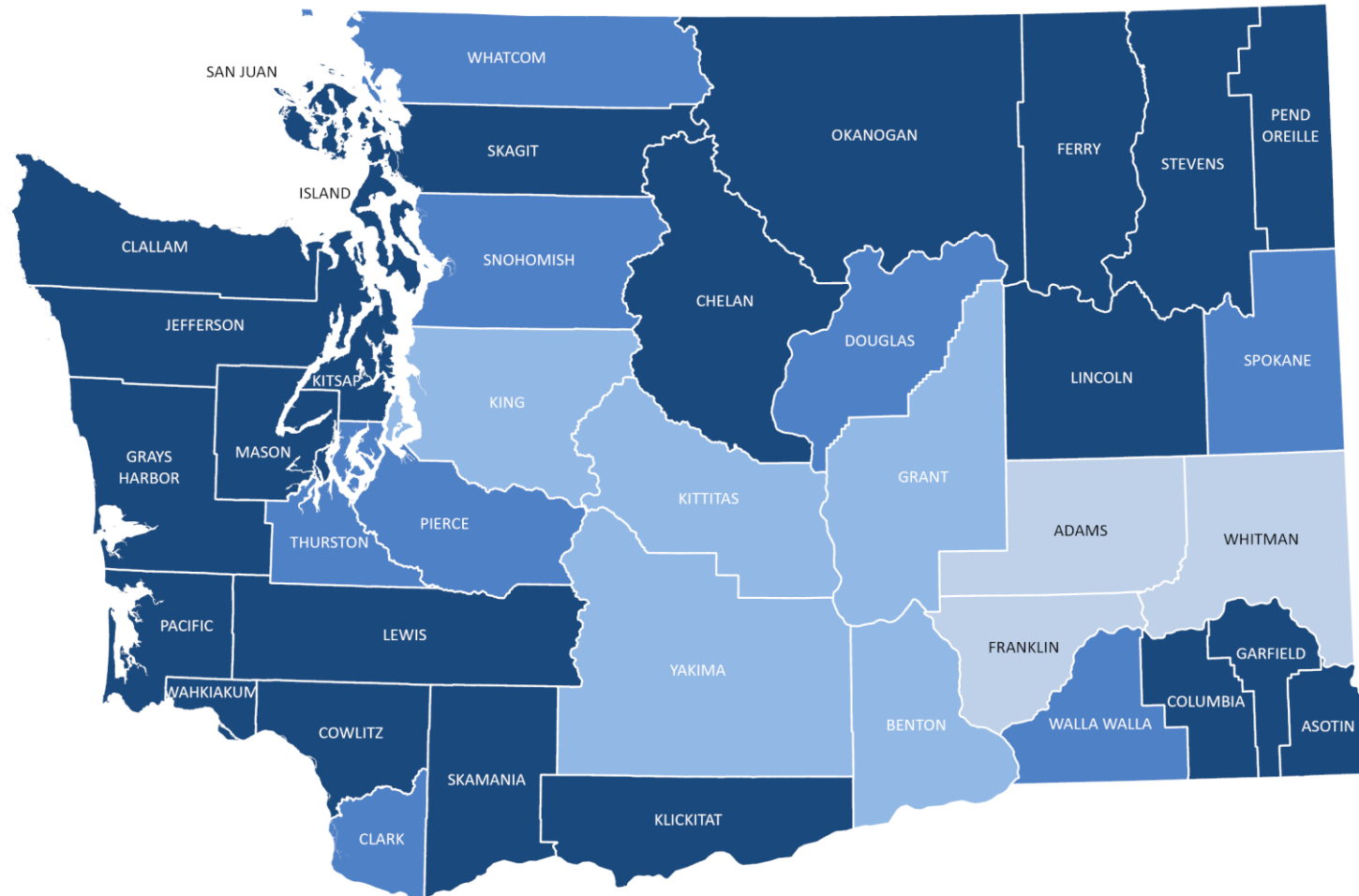
Less than 10%
 10.1% to 15%
 15.1% to 20%
 20.1% to 25%
 More than 25%

SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Projections of the Population Age 65 and Over for Growth Management, 20022 GMA Projections – Medium Series, Feb. 2023; Population Estimates by Age and Sex 2020, 2021, 2022 (Preliminary) accessed July 26th, 2023.

Persons 65+ as a Percentage of the Total Population

2040

Estimates and Projections by County



Less than 10%
 10.1% to 15%
 15.1% to 20%
 20.1% to 25%
 More than 25%

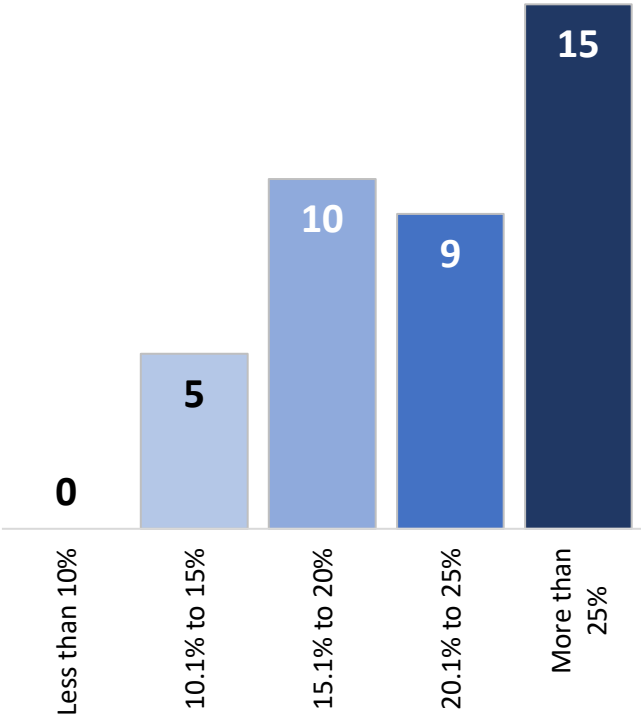
SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Projections of the Population Age 65 and Over for Growth Management, 20022 GMA Projections – Medium Series, Feb. 2023; Population Estimates by Age and Sex 2020, 2021, 2022 (Preliminary) accessed July 26th, 2023.

Persons 65+ as a Percentage of the Total Population

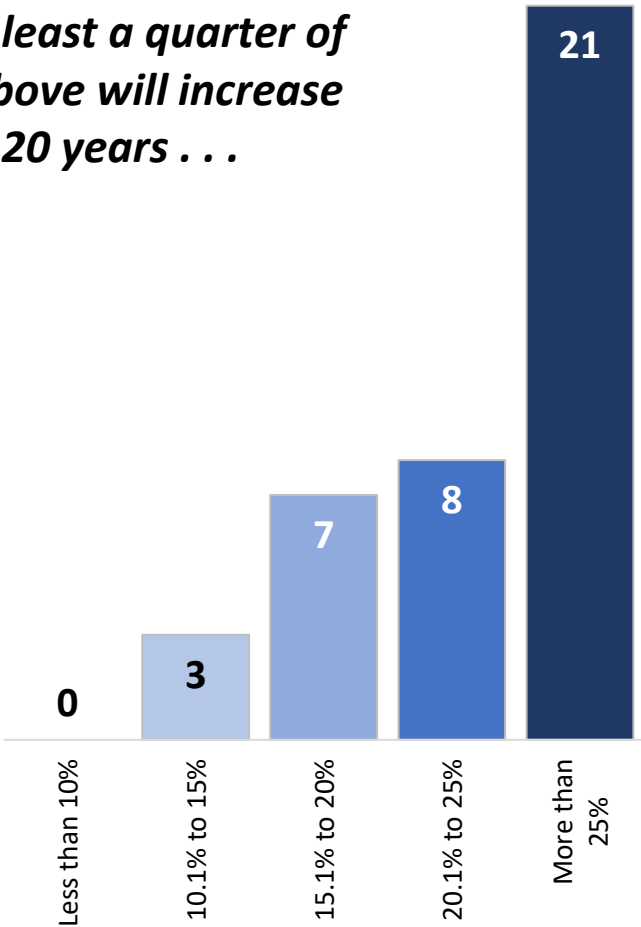
Estimates and Projections by County

2022

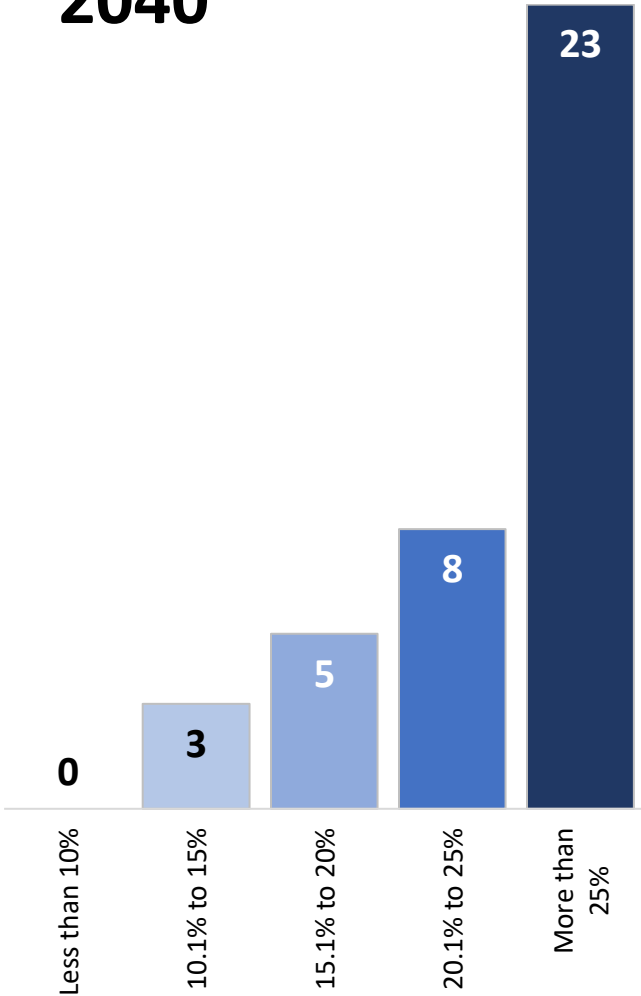
The number of counties with at least a quarter of their population aged 65 and above will increase significantly over the next 20 years . . .



2030



2040

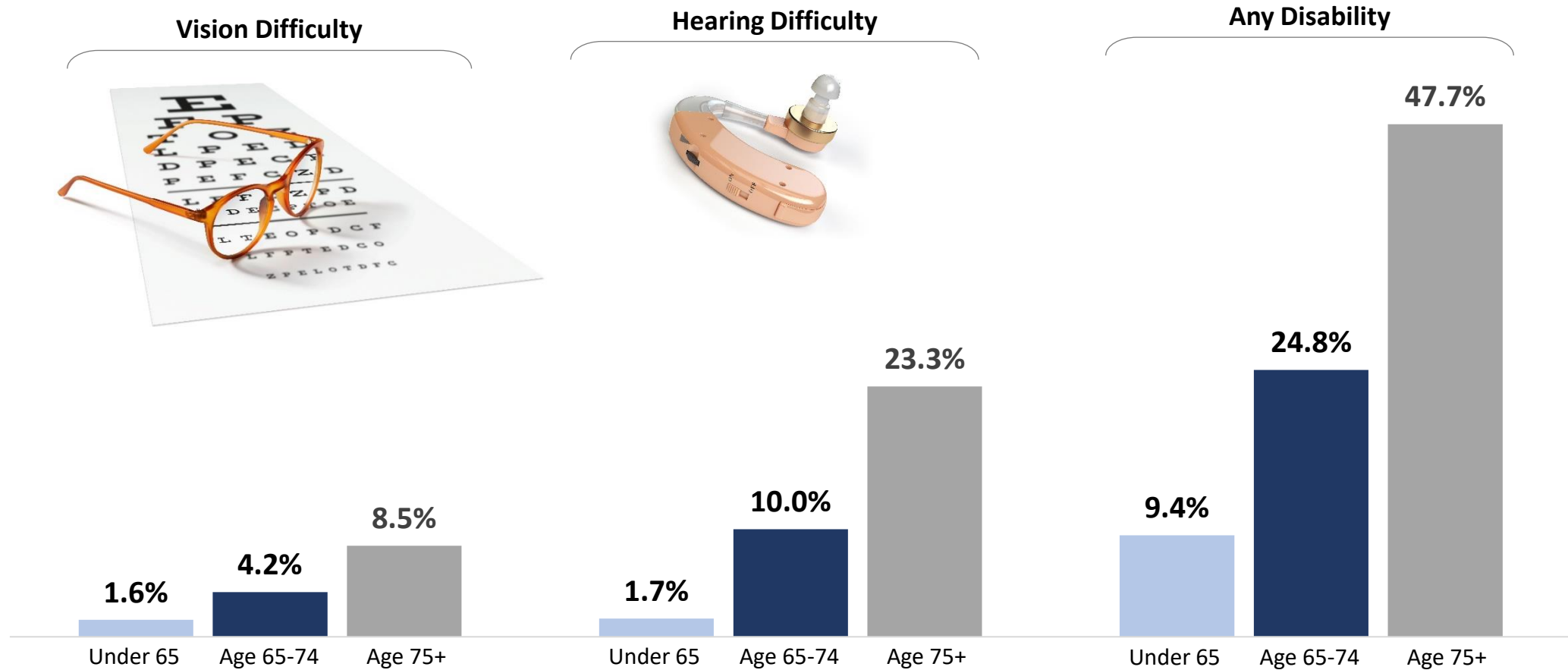


Transforming lives

SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Projections of the Population Age 65 and Over for Growth Management, 2022 GMA Projections – Medium Series, Feb. 2023; Population Estimates by Age and Sex 2020, 2021, 2022 (Preliminary) accessed July 26th, 2023.

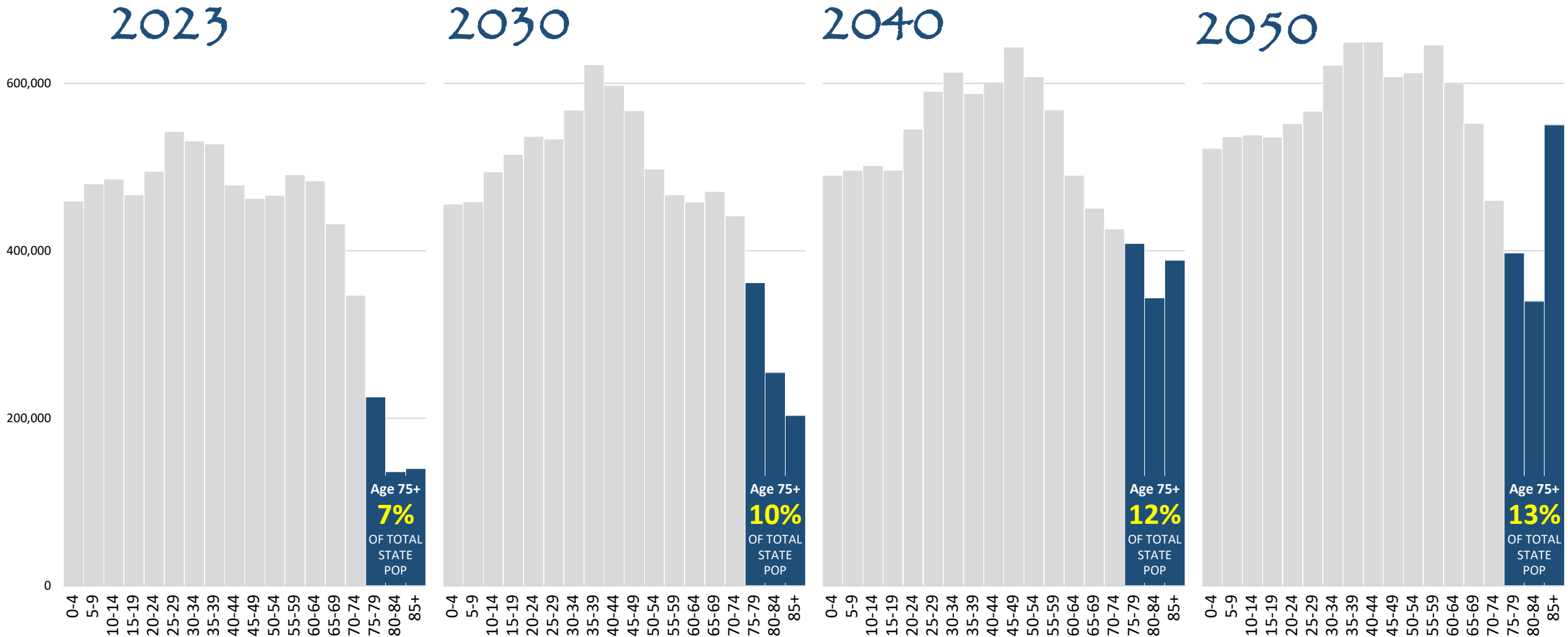
Differences in Vision Difficulty, Hearing Difficulty, and Disability Prevalence by Age

Percent of 2022 Washington State population with . . .



Population Forecast – Focus on Growth in Persons Ages 75 and Above

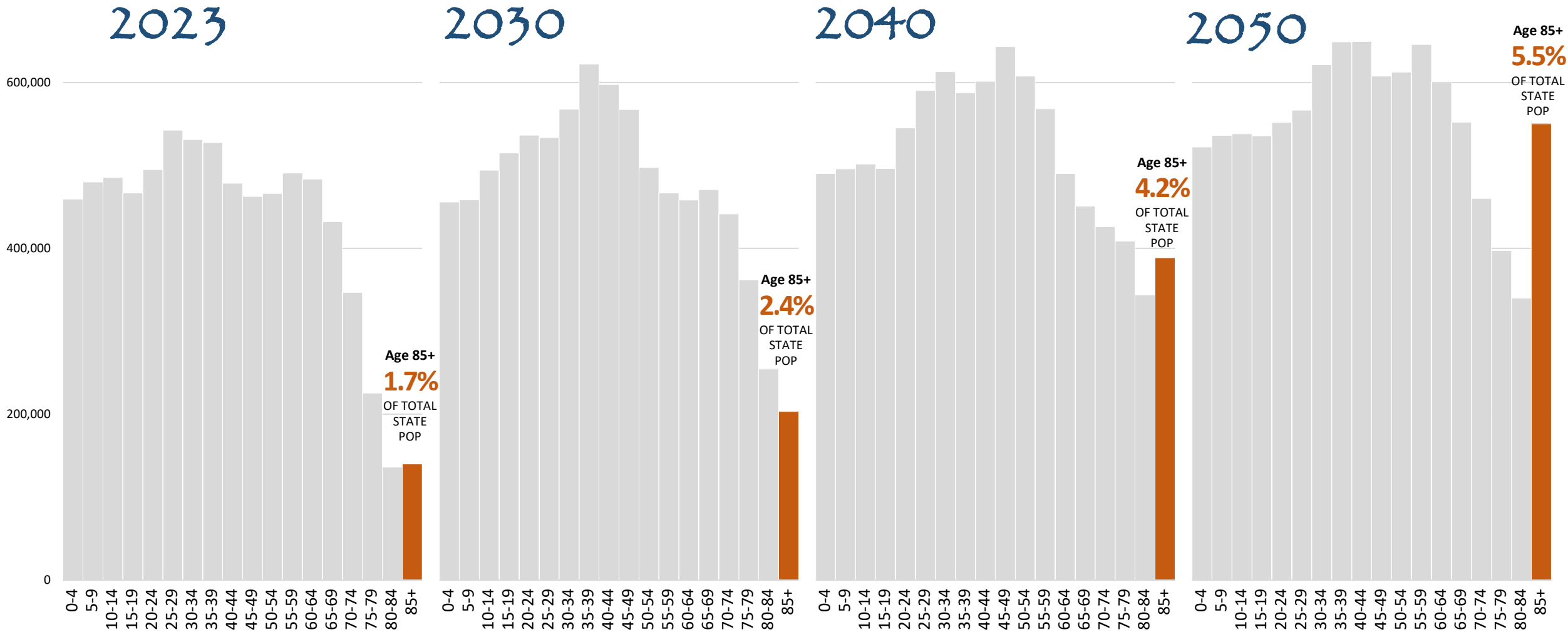
Forecast Age Distribution



SOURCE: Washington State Office of Financial Management, Forecasting and Research Division. State population forecast November 2022, accessed October 2, 2023.

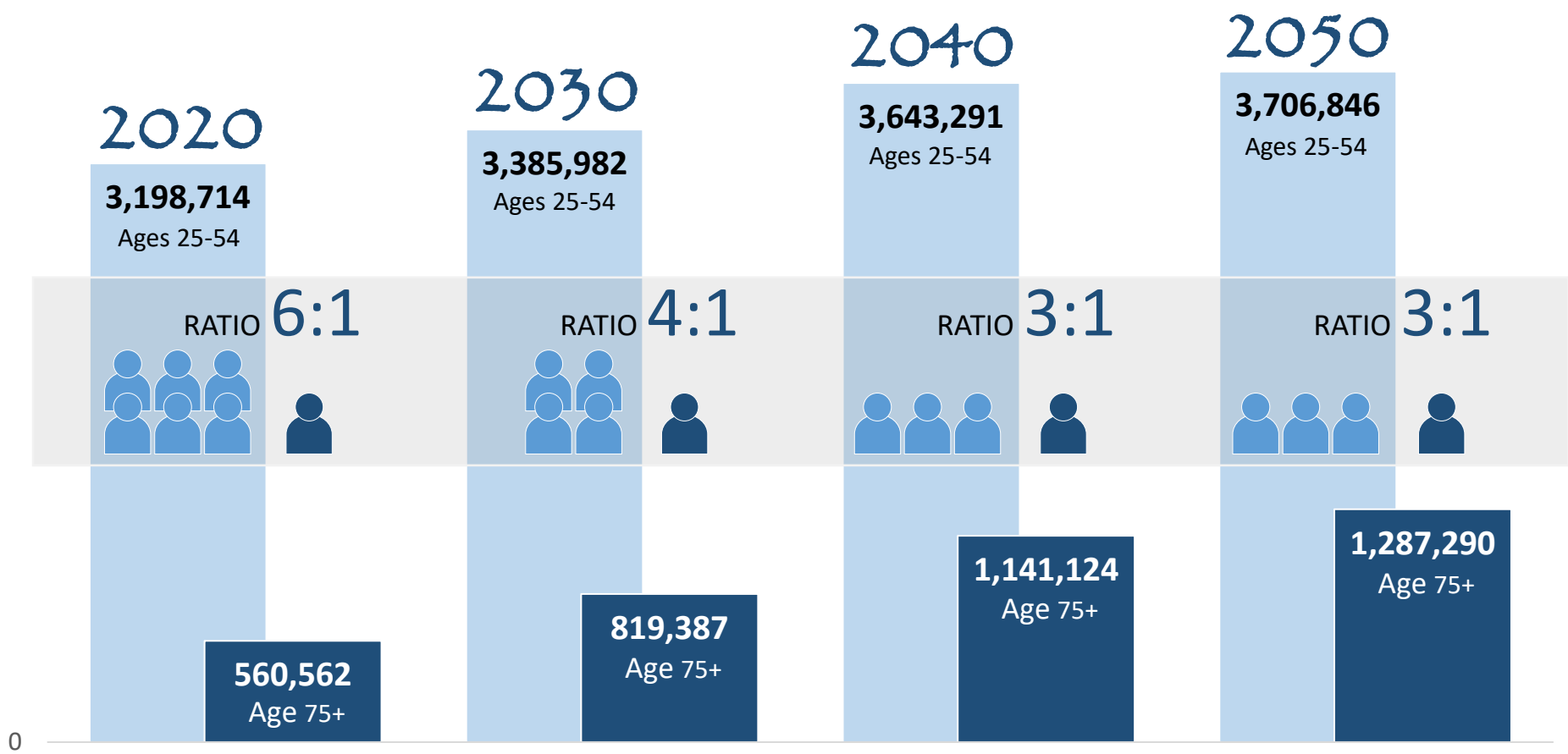
Population Forecast – Focus on Growth in Persons **Ages 85 and Above**

Forecast Age Distribution



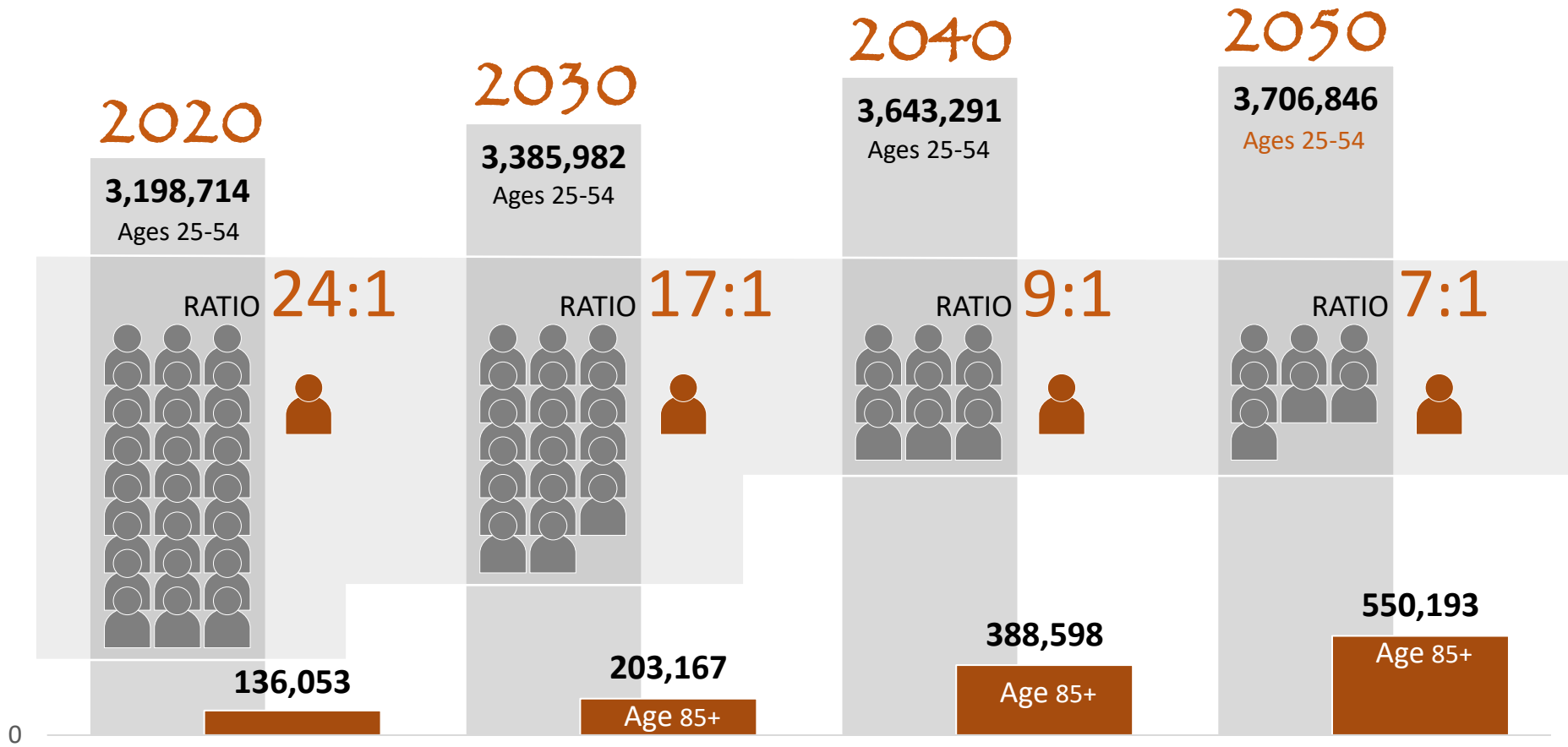
SOURCE: Washington State Office of Financial Management, Forecasting and Research Division. State population forecast November 2022, accessed October 2, 2023.

The Rapidly Growing Size of the Age 75+ Population Relative to Younger Adults Will Greatly Exacerbate Current LTSS Workforce Challenges



SOURCE: Washington State Office of Financial Management, Forecasting and Research Division. State population forecast November 2022, accessed October 2, 2023.

The Rapidly Growing Size of the Age 85+ Population Relative to Younger Adults Will Greatly Exacerbate Current LTSS Workforce Challenges



SOURCE: Washington State Office of Financial Management, Forecasting and Research Division. State population forecast November 2022, accessed October 2, 2023.



Getty Images

PART 2

Dementia Prevalence and Forecasts

Measuring Dementia Prevalence Using Statewide Medicare Data

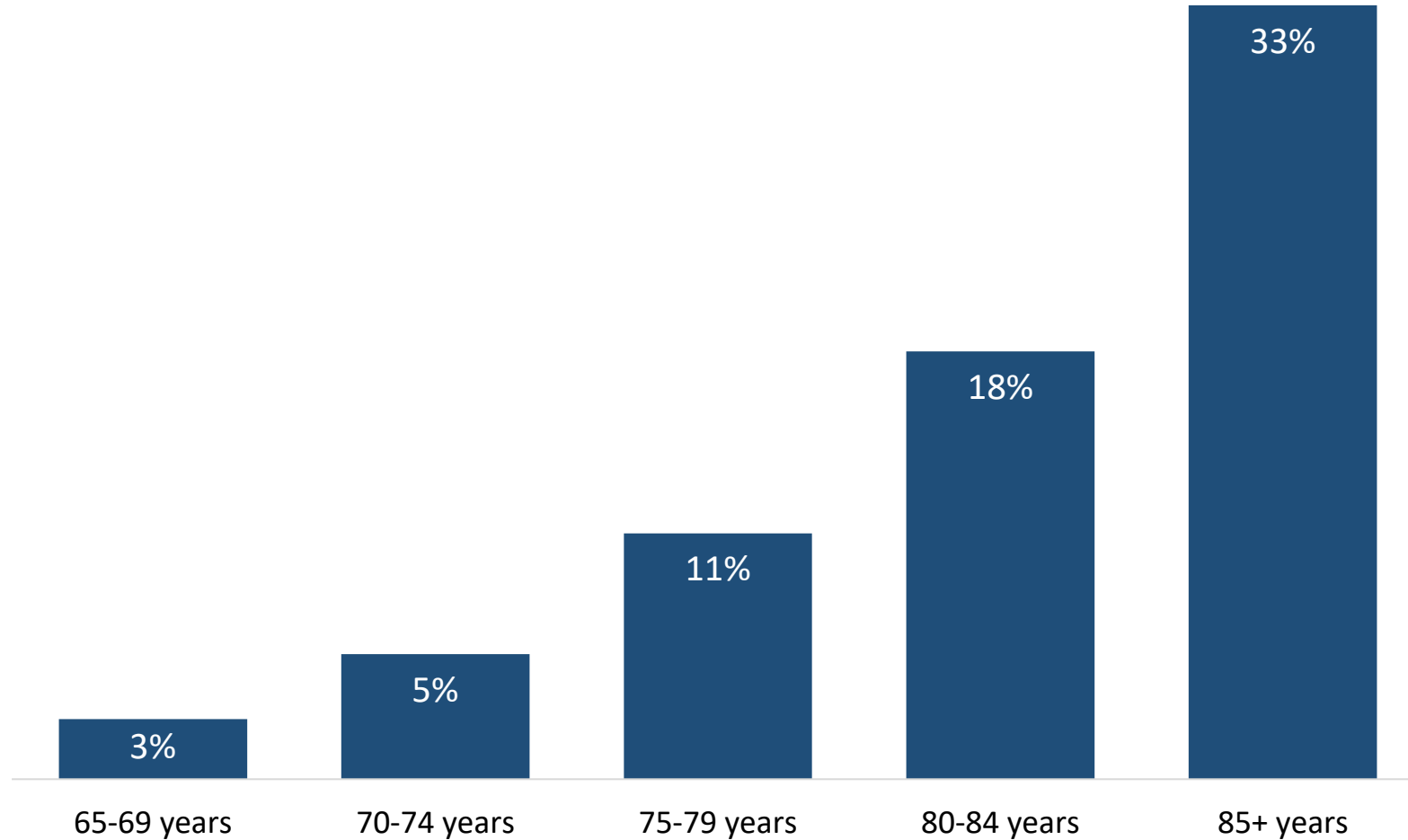
- Dementia prevalence is estimated for CY 2018 Washington State Medicare beneficiaries based on the presence of dementia-related diagnoses in available Medicare claims spanning the 2013 to 2018 time period
- Dementia is defined broadly to include Alzheimer's and related dementia diagnoses (vascular dementia, unspecified dementia, etc.)
- Measuring prevalence using the actual health service experiences of several hundred thousand Washington State Medicare beneficiaries supports more detailed direct prevalence estimates for groups that are often underrepresented in survey data
- Long-term forecasts of dementia prevalence are based on observed prevalence rates for Washington State Medicare beneficiaries and detailed OFM forecasts of state population change through 2040

Additional Measurement Details

- Prevalence estimates were derived from the experience of approximately 675,000 Washington State fee-for-service (FFS) Medicare beneficiaries with at least 6 months of FFS Medicare enrollment in both CY 2017 and CY 2018
- All diagnosis fields recorded on Medicare inpatient, nursing facility, home health, hospice, and carrier claims were scanned to identify indicators of dementia
- Dementia was indicated by the presence of at least one of a specified set of diagnoses over the six-year period spanning 2013 to 2018
- Dementia code set is available upon request

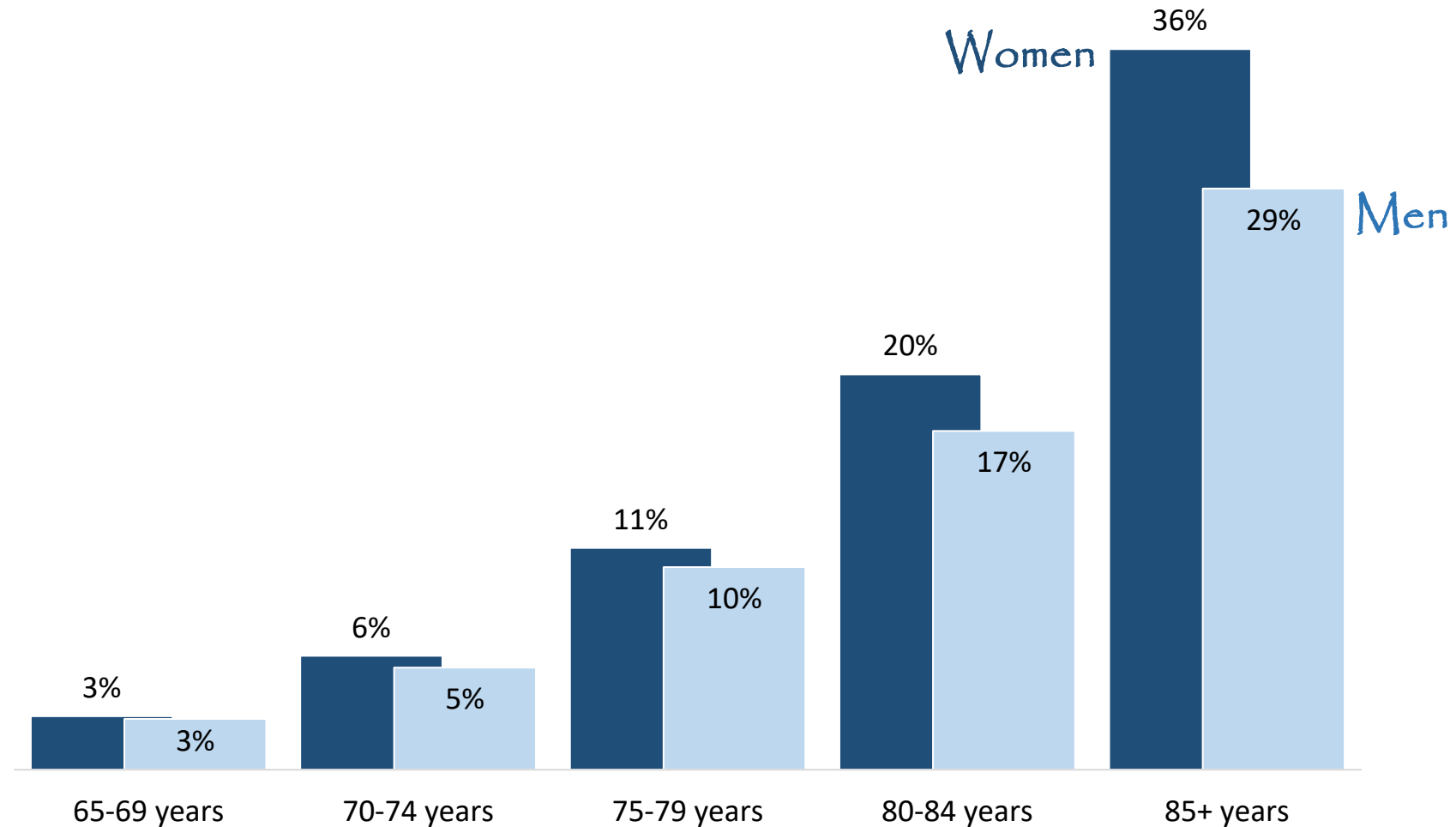
Risk of Dementia Increases with Age

Among 2018 Washington State Medicare Beneficiaries Age 65+



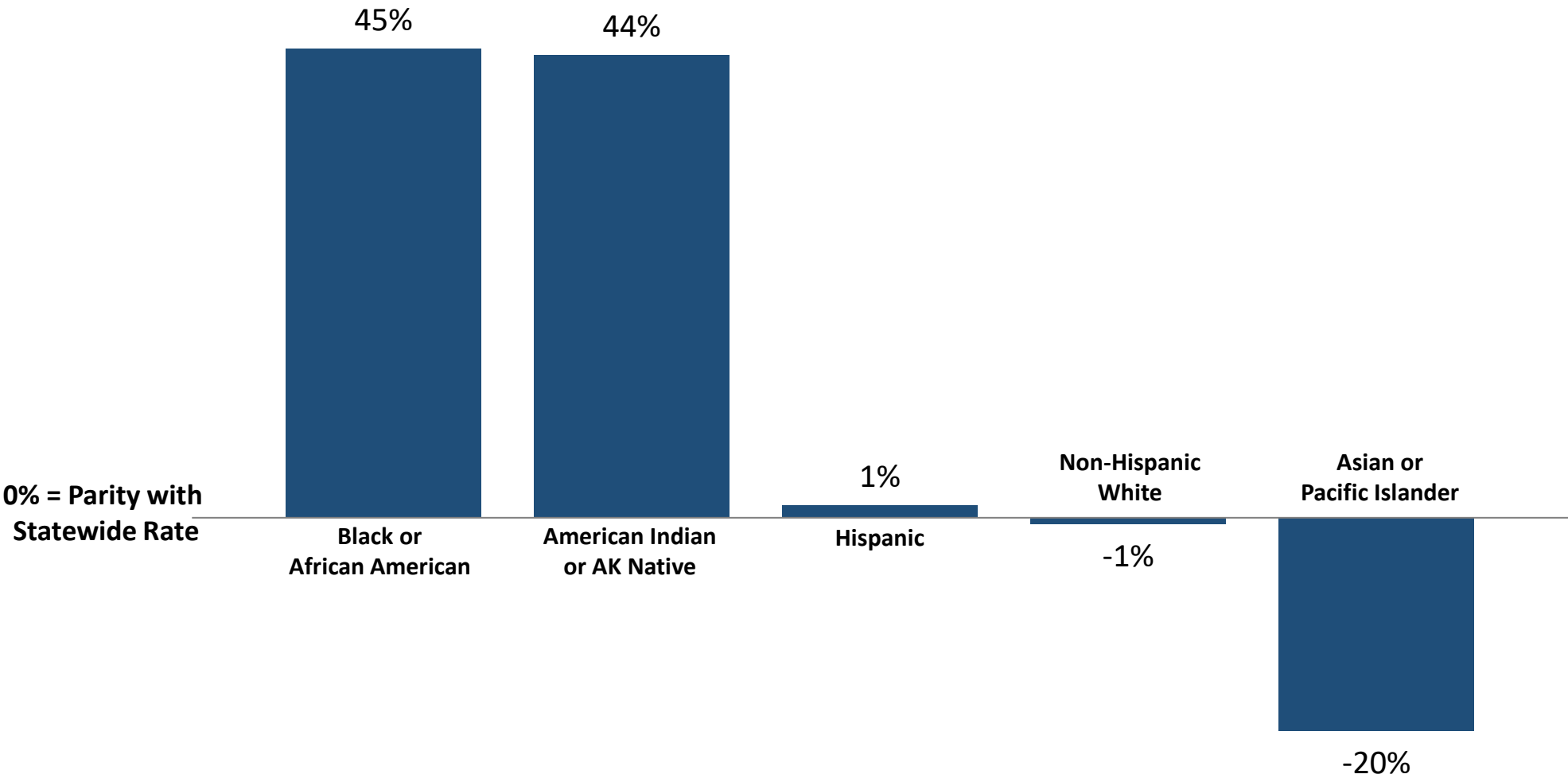
Dementia Prevalence Rates Are Somewhat Higher for Women

Among 2018 Washington State Medicare Beneficiaries Age 65+



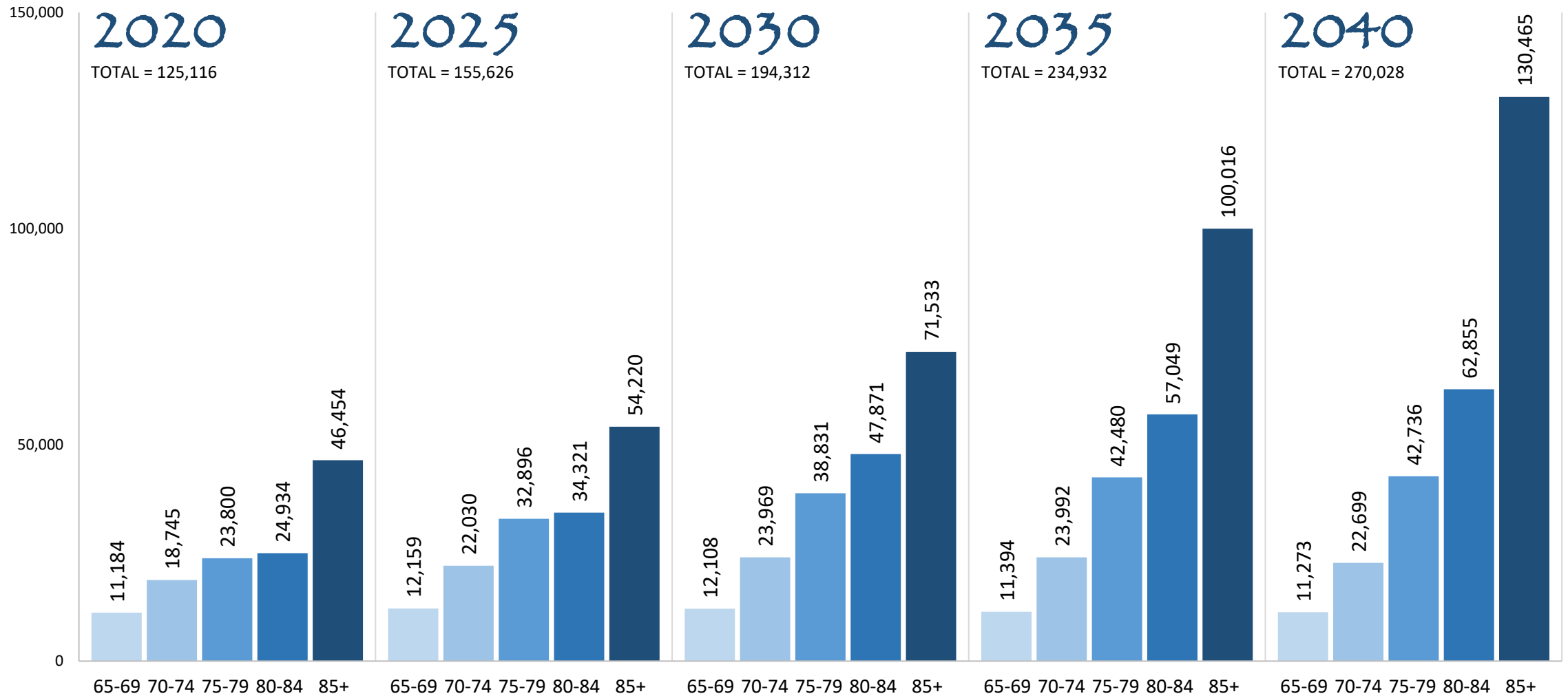
Dementia Risk Is Higher Among Black and American Indian Medicare Beneficiaries

Dementia Prevalence Relative to Statewide Rate Among CY 2018 Washington State Medicare Beneficiaries Aged 65 to 74



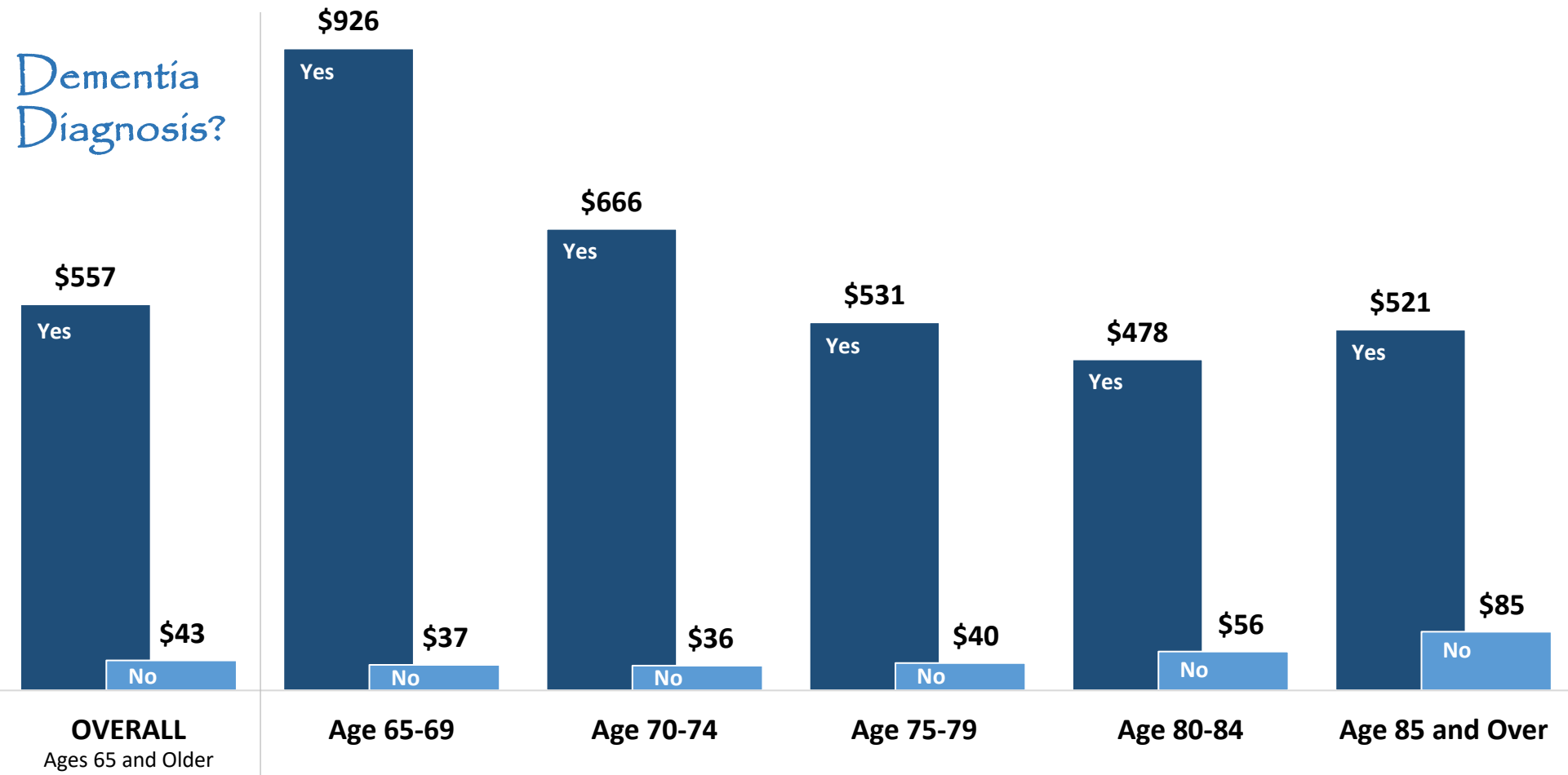
Forecast Number of Persons with Dementia

Among Washington State Residents Age 65+



Medicaid Long Term Services and Supports Expenditure

Per Member Per Month, Ages 65 and Older, CY 2018 Washington State Medicare Beneficiaries





Getty Images

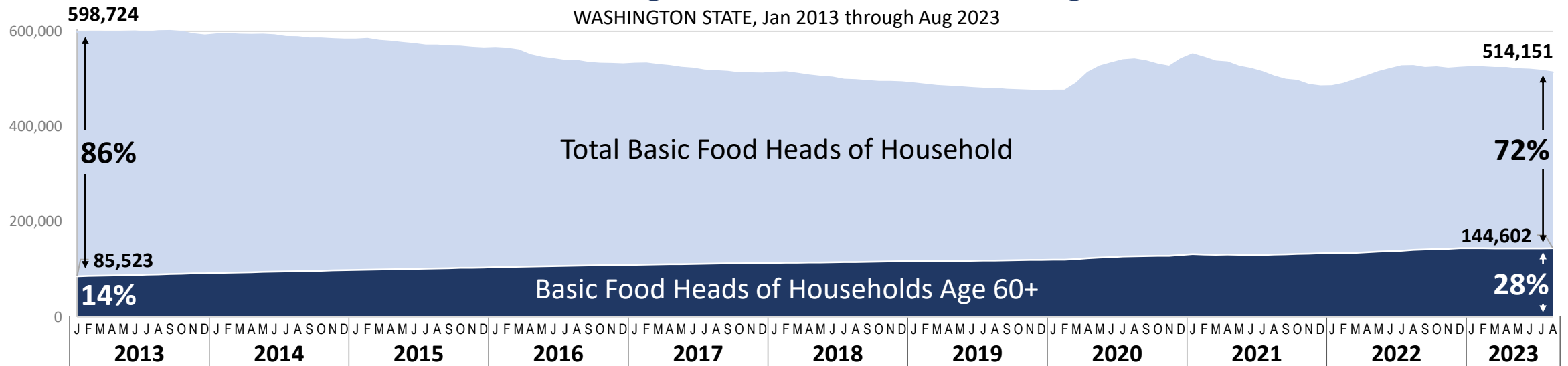
PART 3

Food Insecurity and Housing Instability Among Seniors

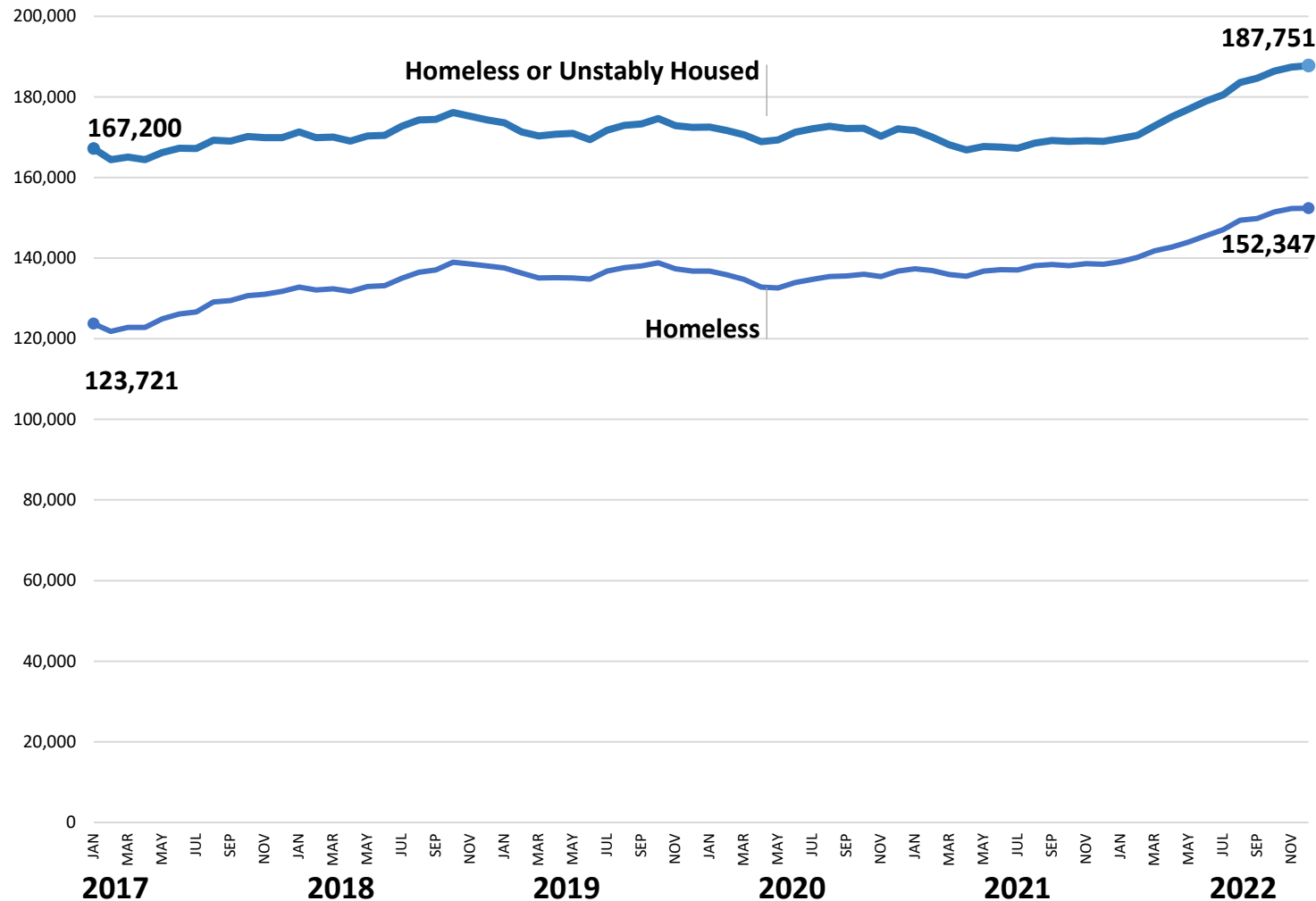
Food Insecurity Among Elders in Washington State

- Although food insecurity among seniors in Washington State is lower than the US average based on national survey data, food insecurity impacts a significant number of seniors, with 28 percent of Basic Food (SNAP) households in Washington State headed by persons aged 60+
- There are currently more than 144,000 households on Basic Food in Washington State headed by persons aged 60+. This is an increase of 69 percent since January 2013, while the overall Basic Food caseload declined by 14 percent over the same time period.

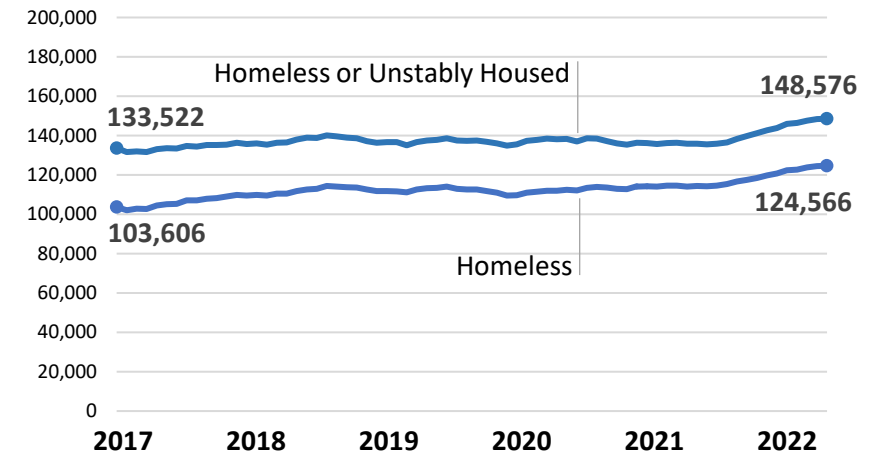
Basic Food Heads of Household Age 60 and Over are Increasing as Percent of the Total



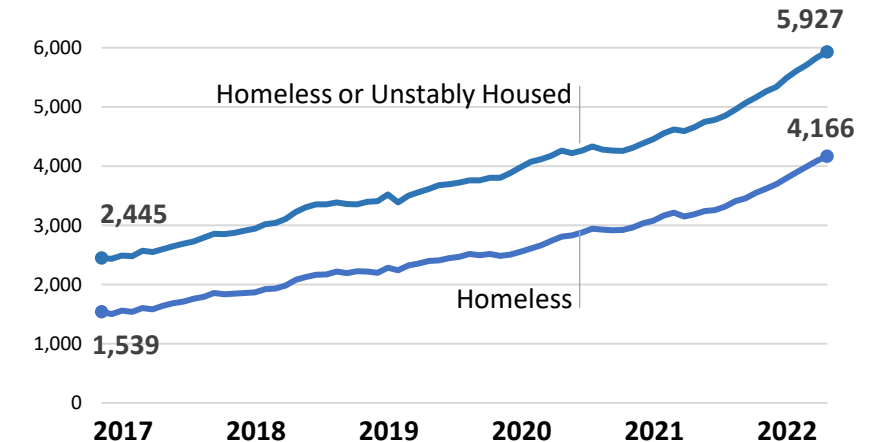
Homeless or Unstably Housed, All Ages



Homeless or Unstably Housed Adults, 18 to 64



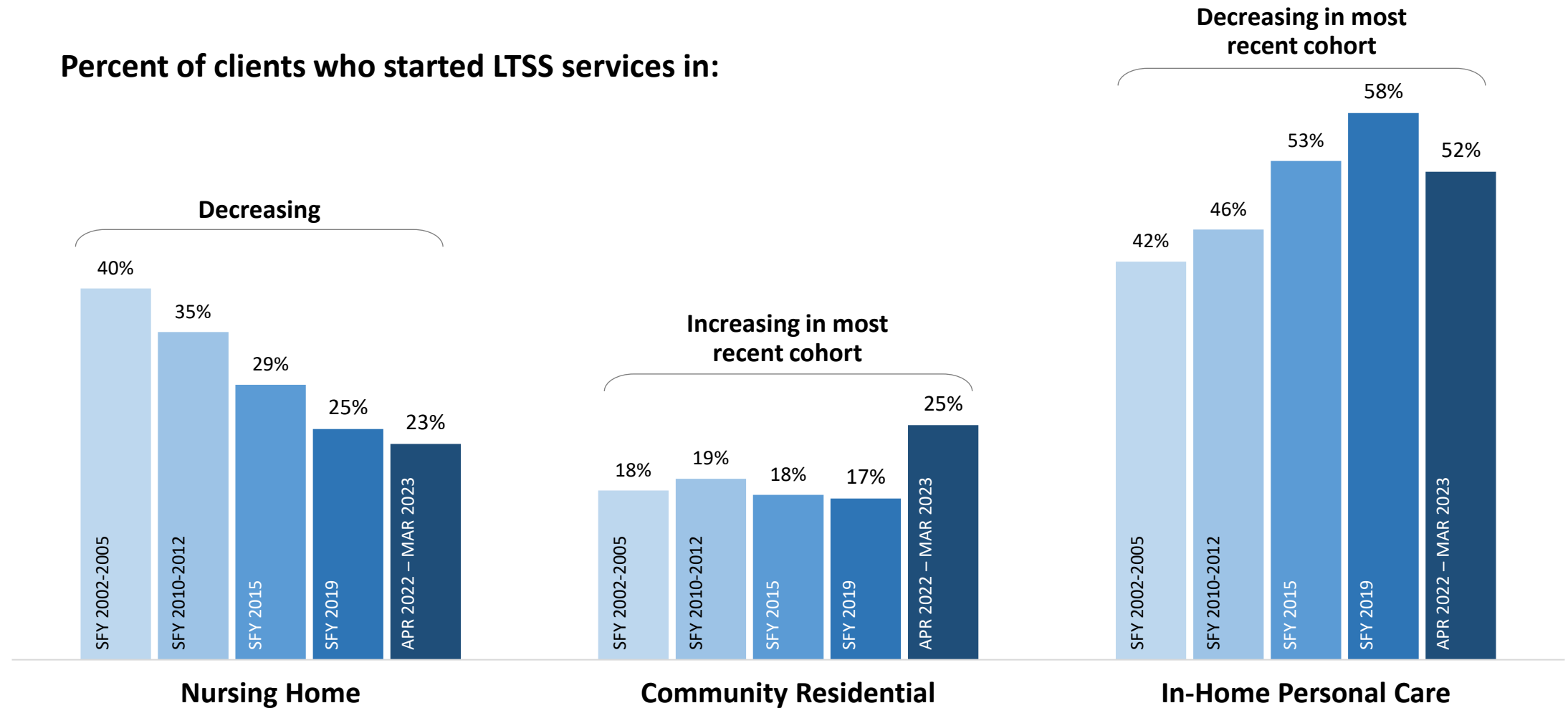
Homeless or Unstably Housed Adults, 65+



Initial Service Modality Is Increasingly In-Home Personal Care

Comparison of cohorts starting LTSS services in SFYs 2002-05, 2010-12, 2015, 2019, and the 12 months ending March 2023

Percent of clients who started LTSS services in:



Prevalence of Homelessness Among Seniors Is Relatively Low, But Growing Rapidly

- **The number of homeless elders identifiable through participation in public health and human service programs more than doubled from 2016 to 2022**
- There is significant regional variation in housing instability and homelessness driven by regional differences in housing affordability
- The decline in mobile home communities (75 fewer communities statewide since 2019) is one facet of broader affordability challenges
- Mental health needs and substance use disorders are significant risk factors for homelessness at the individual level
- **The Medicaid LTSS delivery system has become an increasingly important resource for housing supports**



Getty Images

Appendix Supplemental Information



Getty Images

LTSS Policy Innovations and Rebalancing Towards Home- and Community-based Services

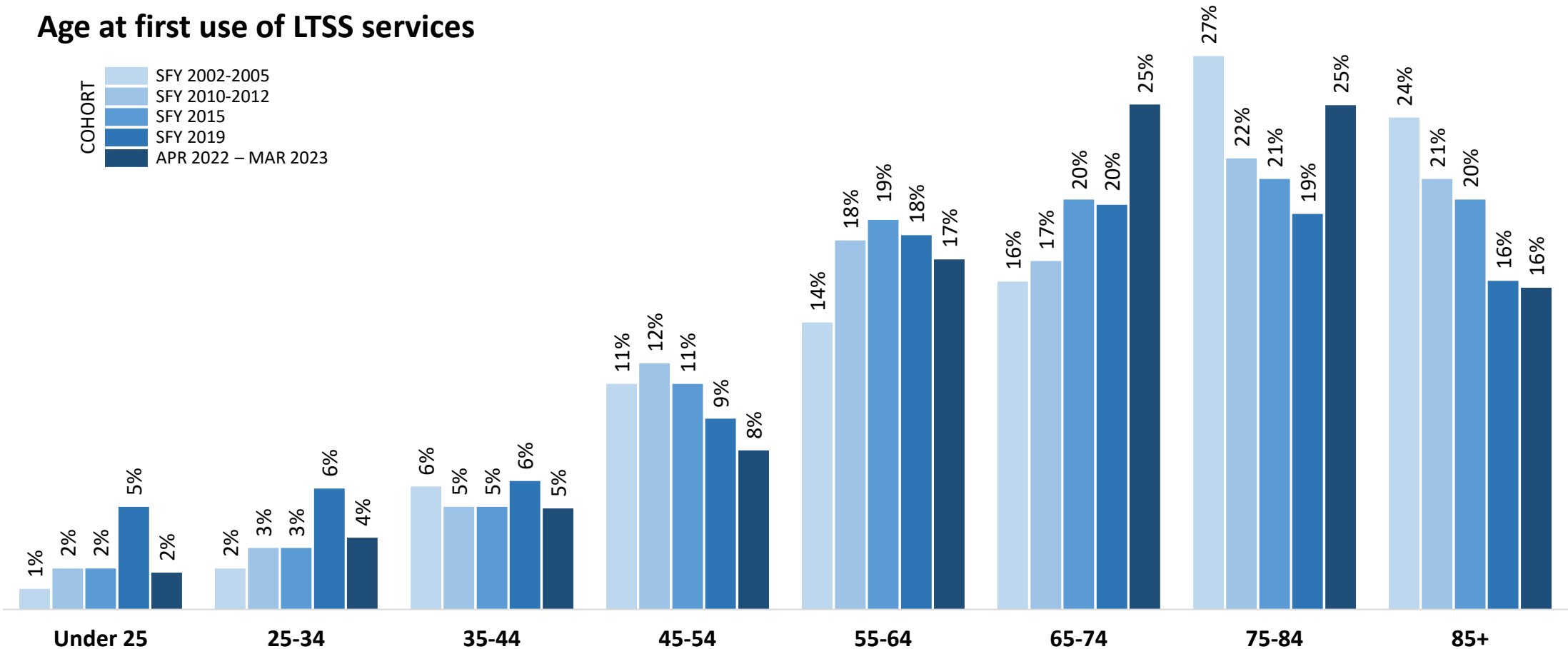
LTSS Program Initiatives Supporting Rebalancing

40 years of innovation!



Age at First Use of LTSS Services Has Been Decreasing over Time

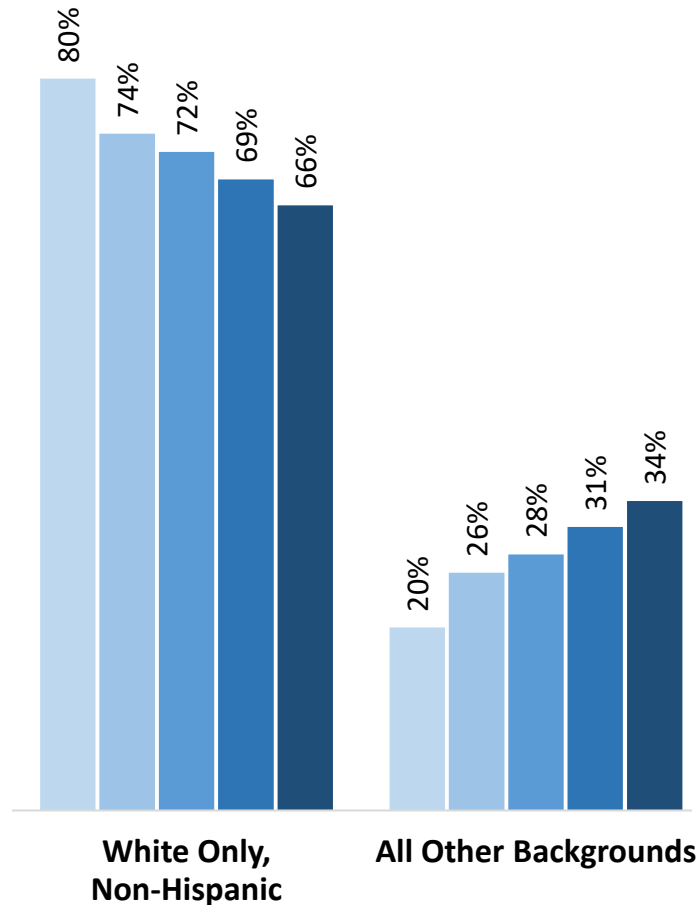
Comparison of cohorts starting LTSS services in SFYs 2002-05, 2010-12, 2015, 2019, and the 12 months ending March 2023



Increasing Diversity of Medicaid LTSS Clients Over Time

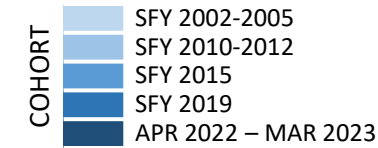
Comparison of cohorts starting LTSS services in SFYs 2002-05, 2010-12, 2015, 2019, and the 12 months ending March 2023

Race/Ethnicity

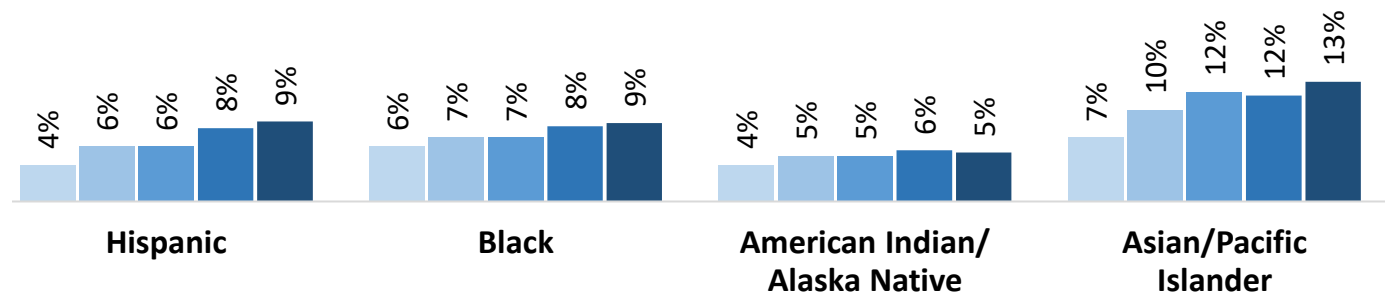


DETAIL

NOTE: Categories are not mutually exclusive.



► **Increased share of LTSS entrants are American Indian/ Alaska Native, Asian, Black, and/or Hispanic**

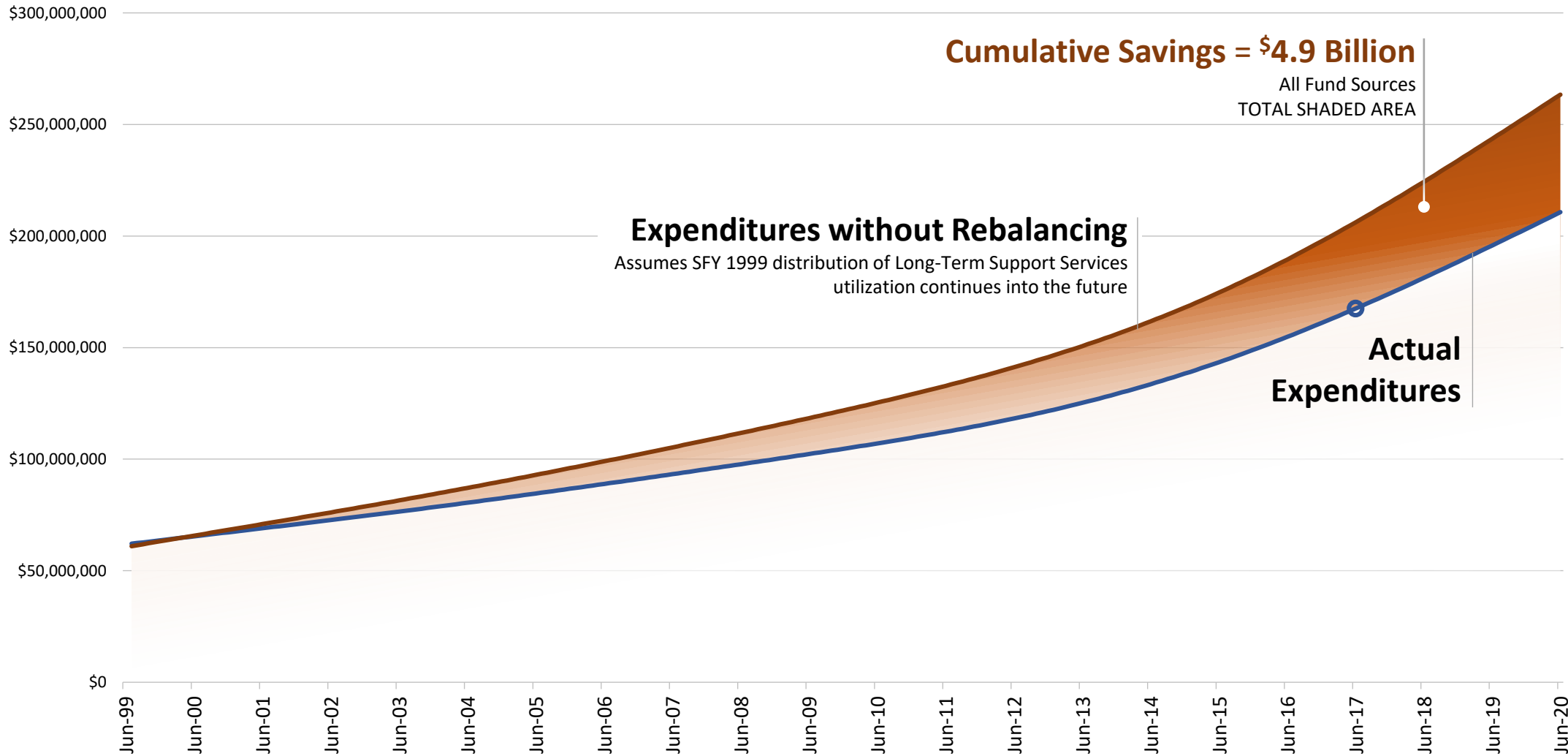


LTSS Rebalancing Financial Impact Methodology

- Calculate the percentage distribution of ALTSA LTSS clients across major service modalities in SFY 1999: In-home Personal Care, Adult Family Homes, Assisted Living, Adult Residential Centers, and Nursing Homes
- Simulate the **caseloads** that would have been experienced by major modality if percentage distribution of LTSS caseloads across modalities over the SFY2000-2020 period had remained the same as experienced in SFY 1999
- Simulate the **expenditures** that would have been experienced by applying actual SFY 2000-2020 per capita costs by service modality to the simulated caseload distribution
- Compare the total costs of the simulated caseload distribution to the actual and forecast total LTSS costs incurred over the SFY 2000-2020 period
- The difference comprises the estimated savings (all funds)

AL TSA Long-Term Services and Supports Rebalancing Savings

Monthly Service Expenditures • All Fund Sources • SFY 2000-2020



Key Findings

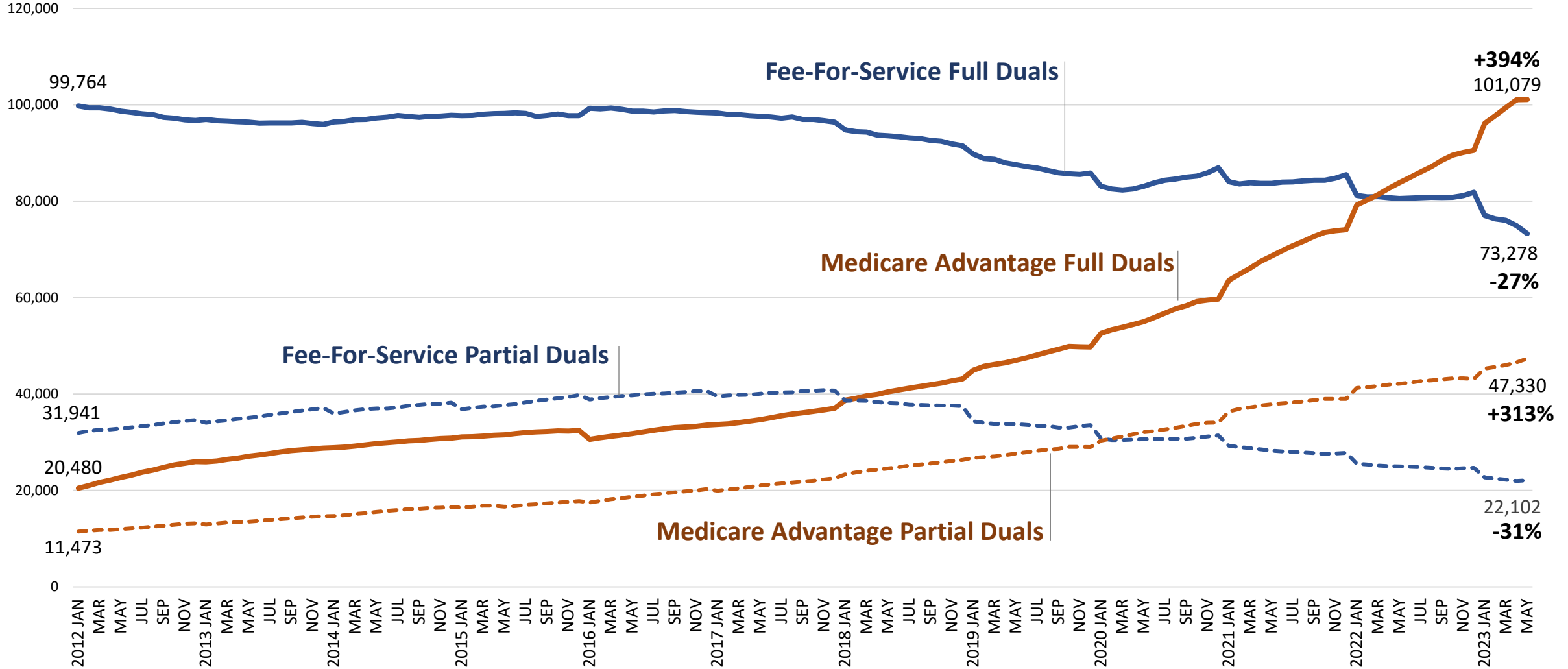
- More people are starting their LTSS experience receiving in-home care or services in a community residential facility, rather than in a nursing facility
- The LTSS population is becoming more diverse
- Rebalancing away from nursing facilities and towards home- and community-based services produced nearly \$5 billion in Medicaid savings (all funds) from SFY 2000 through SFY 2020
- Rebalancing is forecast to add \$2.3 billion in savings (all funds) from SFYs 2021 through 2023

Medicare and Social Security Recipients

	Medicare ¹ (June 2022)		Social Security ² (December 2021)	
	Hospital and/or Medical	Prescription Drug	Total (All Categories)	Age 65 and Older
WASHINGTON	1,451,812	1,011,984	1,413,306	1,143,754
Adams	2,670	1,924	2,740	2,115
Asotin	6,619	4,738	6,925	5,265
Benton	38,367	27,292	38,530	30,260
Chelan	18,673	13,643	18,700	15,485
Clallam	28,276	18,896	27,915	23,635
Clark	96,903	74,379	94,845	77,095
Columbia	1,336	873	1,355	1,065
Cowlitz	27,180	21,335	28,525	21,745
Douglas	8,691	6,298	8,685	7,235
Ferry	2,490	1,492	2,580	2,015
Franklin	11,544	8,146	11,855	8,905
Garfield	731	502	680	560
Grant	17,204	12,374	17,645	13,590
Grays Harbor	21,398	14,310	22,405	16,905
Island	25,376	16,177	24,640	21,320
Jefferson	14,338	9,831	13,690	12,160
King	335,871	243,953	304,735	258,370
Kitsap	60,607	32,558	57,140	46,985
Kittitas	9,657	6,266	9,525	7,895
Klickitat	6,555	4,147	6,670	5,375
Lewis	21,962	15,590	22,915	17,515
Lincoln	3,394	2,197	3,490	2,795
Mason	18,846	11,737	19,055	15,170
Okanogan	11,500	7,501	11,635	9,275
Pacific	8,766	5,969	9,120	7,355
Pend Oreille	4,458	2,921	4,635	3,595
Pierce	160,858	104,806	160,390	124,705
San Juan	6,508	4,890	5,985	5,455
Skagit	33,400	23,894	33,105	27,660
Skamania	2,965	1,927	2,870	2,315
Snohomish	137,534	101,591	132,375	107,815
Spokane	112,132	80,701	112,460	86,220
Stevens	13,877	9,357	14,290	10,995
Thurston	64,702	36,799	64,895	51,670
Wahkiakum	1,688	1,207	1,670	1,325
Walla Walla	14,107	9,312	13,960	11,430
Whatcom	50,037	37,241	48,380	40,215
Whitman	6,422	3,628	6,405	5,100
Yakima	44,167	31,582	45,885	35,165
Unknown	*	*	N/A	N/A

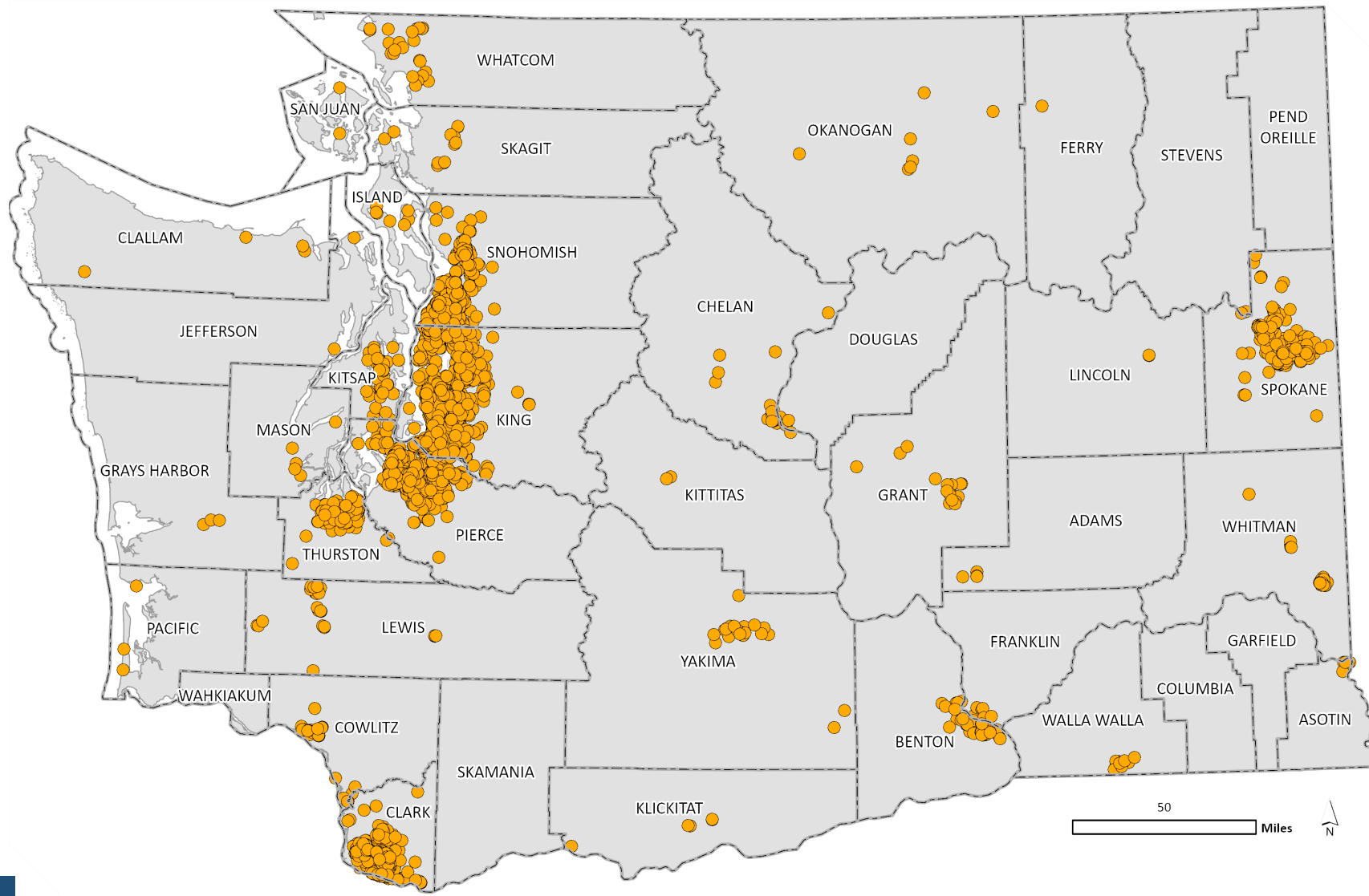
Medicare Advantage Plans Have Rapidly Gained Market Share

Medicaid and Medicare Full Dual and Partial Dual Eligibles, January 2012 – May 2023



DSHS Licensed Adult Family Homes

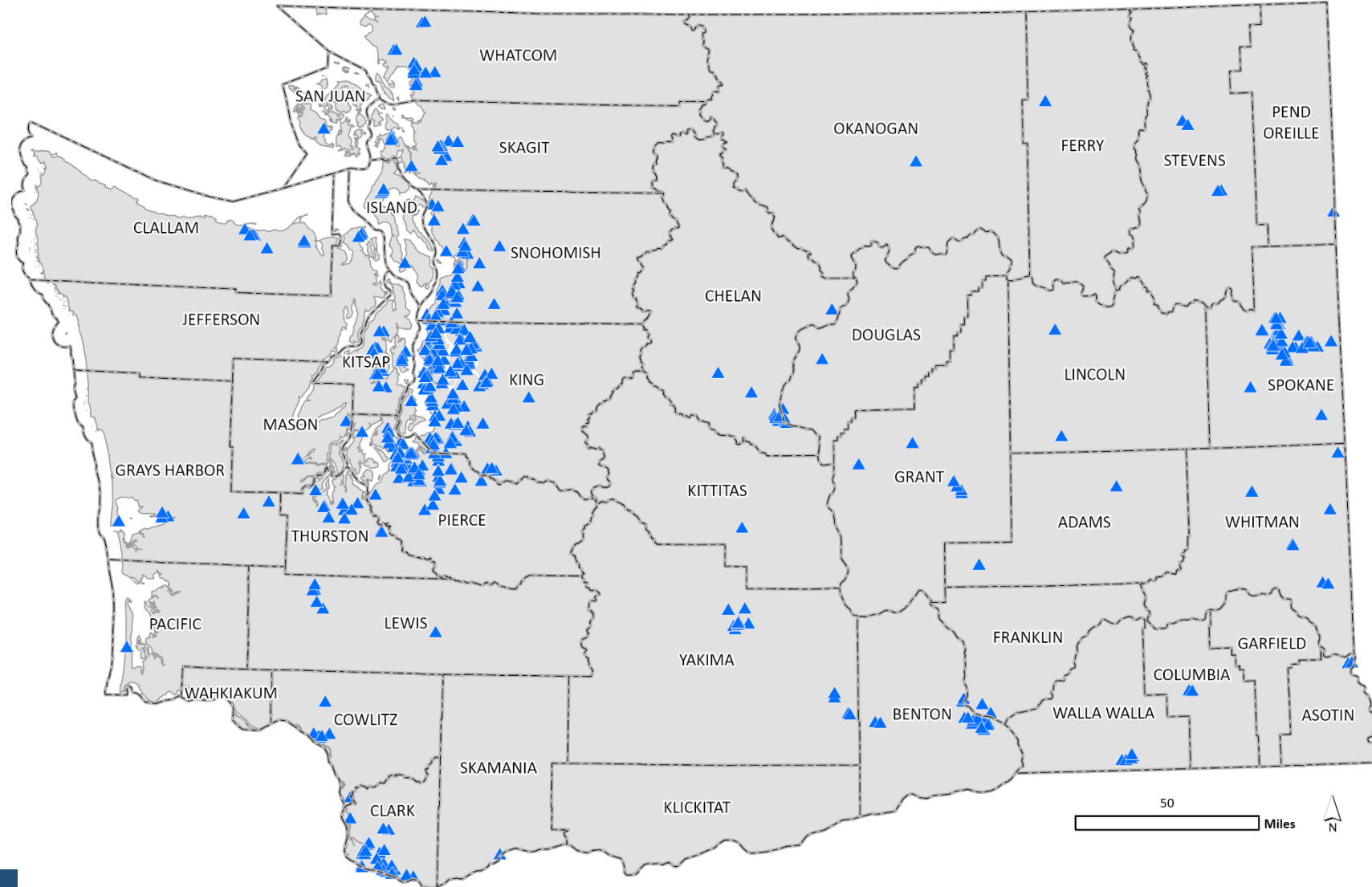
AS OF July 27th, 2023 TOTAL = 4,315



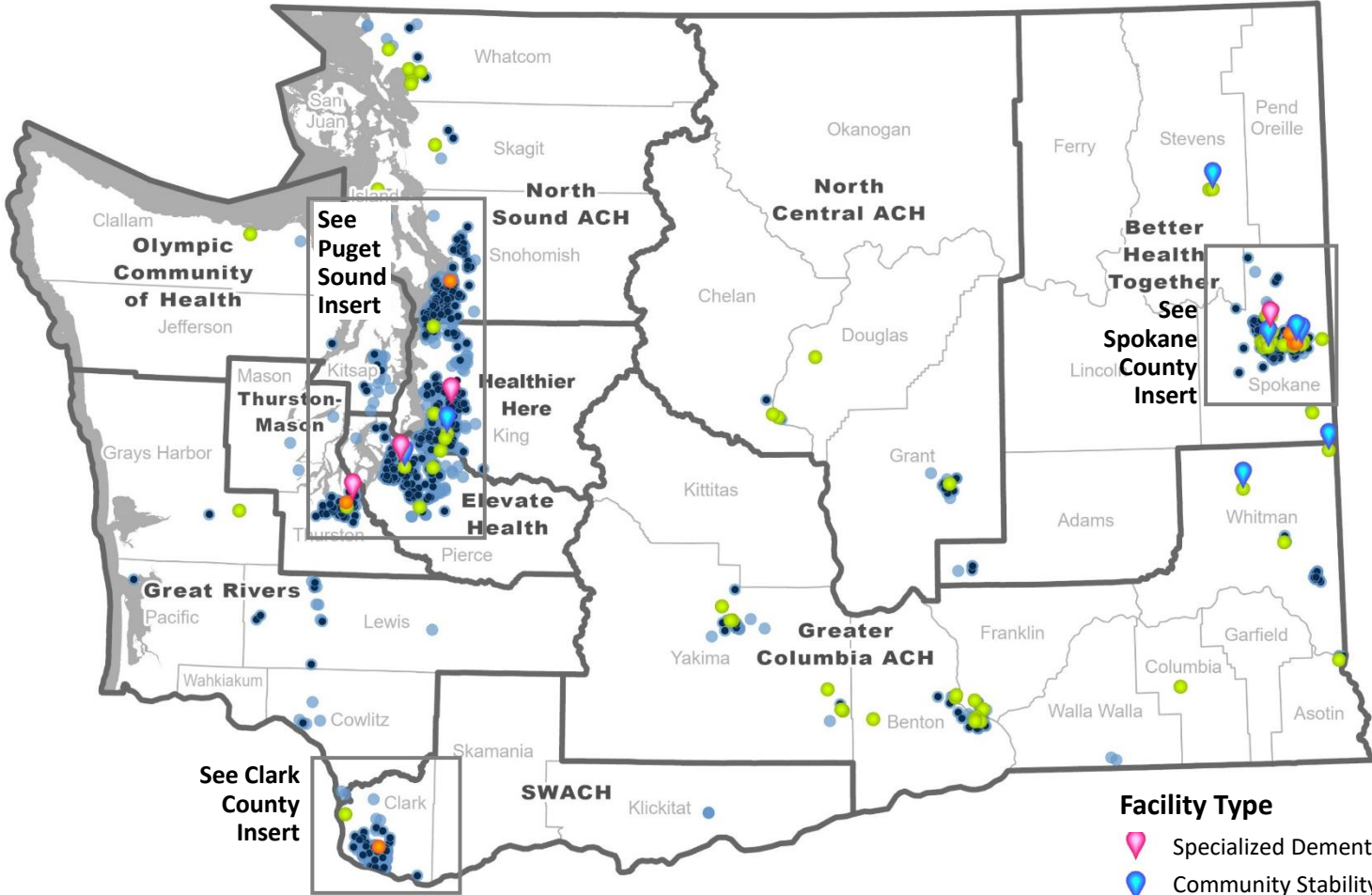
SOURCE: DSHS Enterprise GIS Geospatial Data Library, accessed August 25th, 2022.

DSHS Licensed Assisted Living Facilities

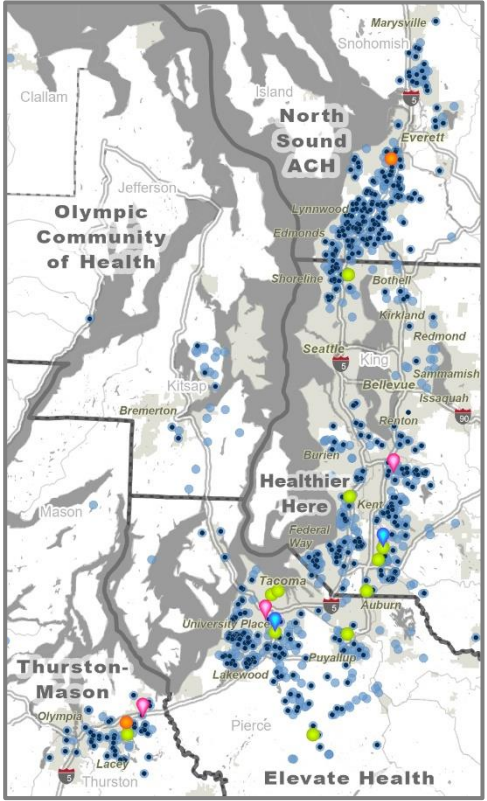
AS OF July 27, 2023 TOTAL = 552



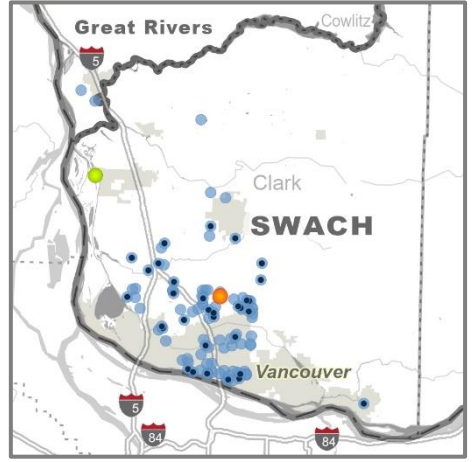
AL TSA Specialized Contract Facilities with Behavioral Supports



Puget Sound Insert



Clark County Insert



Spokane County Insert

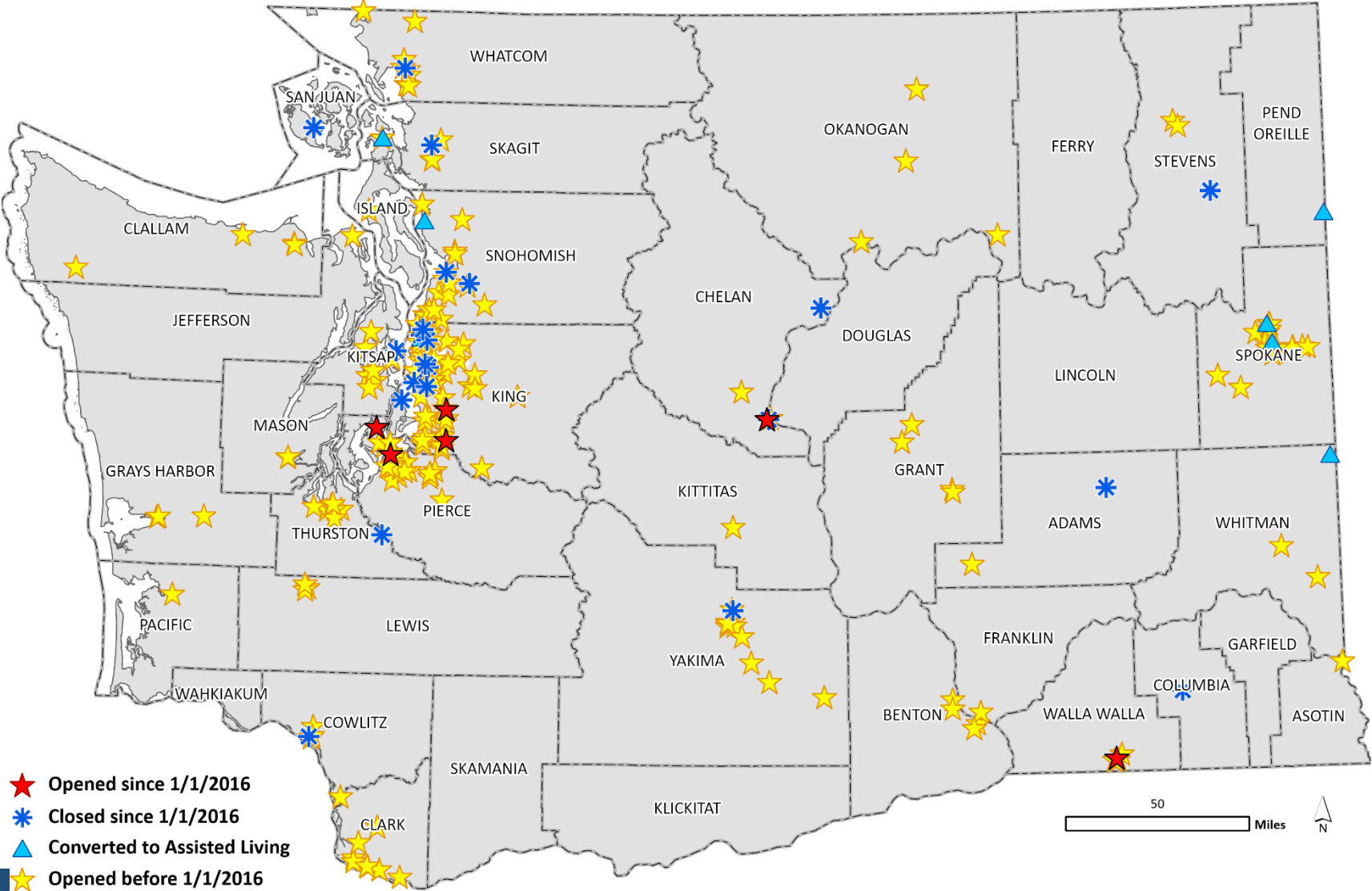


- Facility Type**
- Specialized Dementia Care Program Plus (SDCP+)
 - Community Stability Supports (CSS)
 - Enhanced Services Facility (ESF)
 - Assisted Living Facility • Expanded Community Services (ALF ECS)
 - Adult Family Home • Specialized Behavior Supports (AFH SBS)
 - Adult Family Home • Expanded Community Services (AFH ECS)
 - HCA Medicaid Purchasing Regions



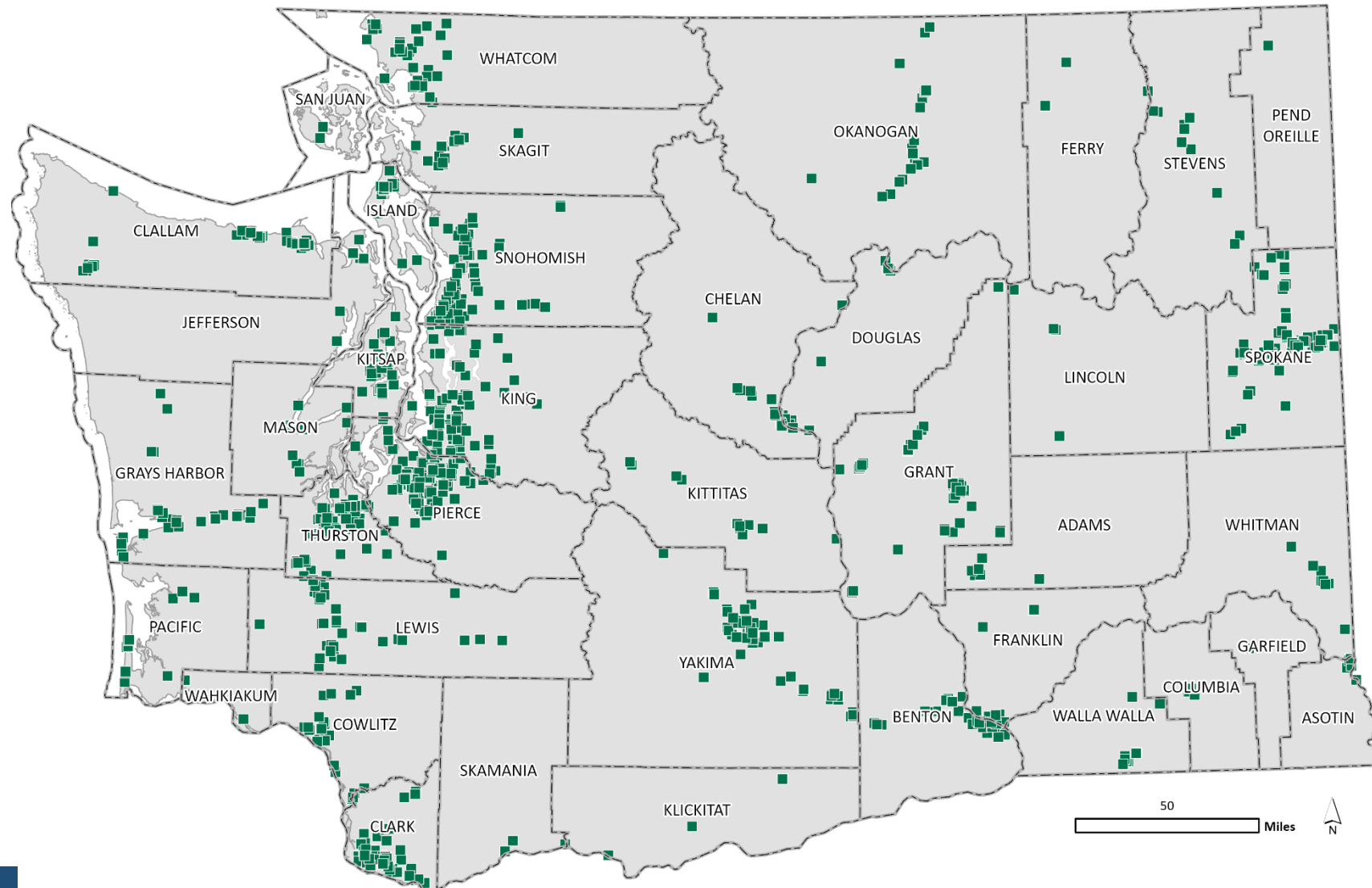
DSHS Licensed Nursing Homes

AS OF July 27, 2023 TOTAL (Currently Open) = 199



Manufactured/Mobile Home Communities

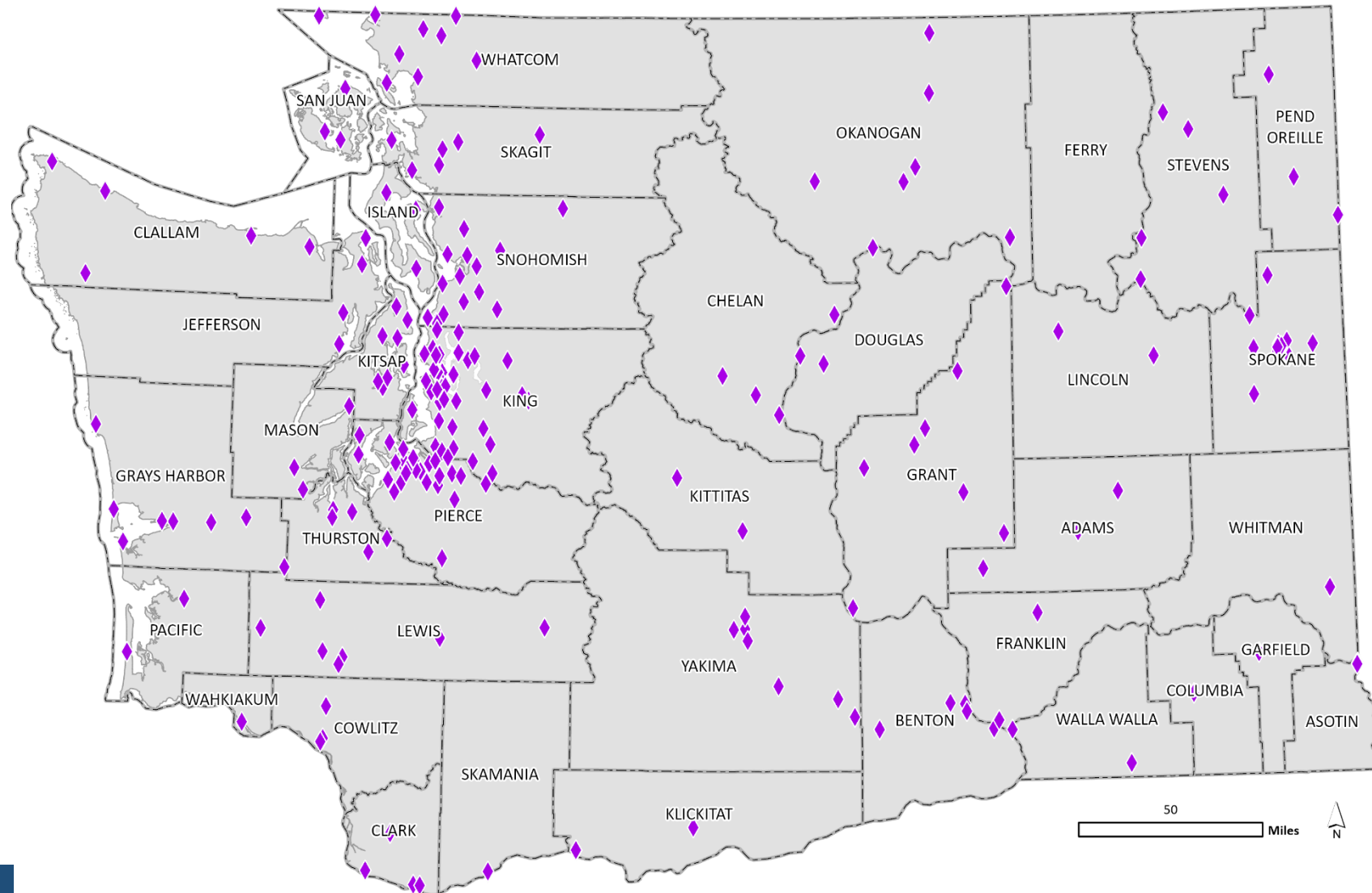
AS OF July 27, 2023 WITH KNOWN CLOSURES IN 2020, TOTAL = 1,169 Communities, 65,174 Rental Spaces, 6,044 Vacant Units



SOURCE: Washington State Department of Commerce, Registered Manufactured/Mobile Home Communities in Washington as of July 2023, updated with known closures in 2020.

Senior Center Locations in Washington State

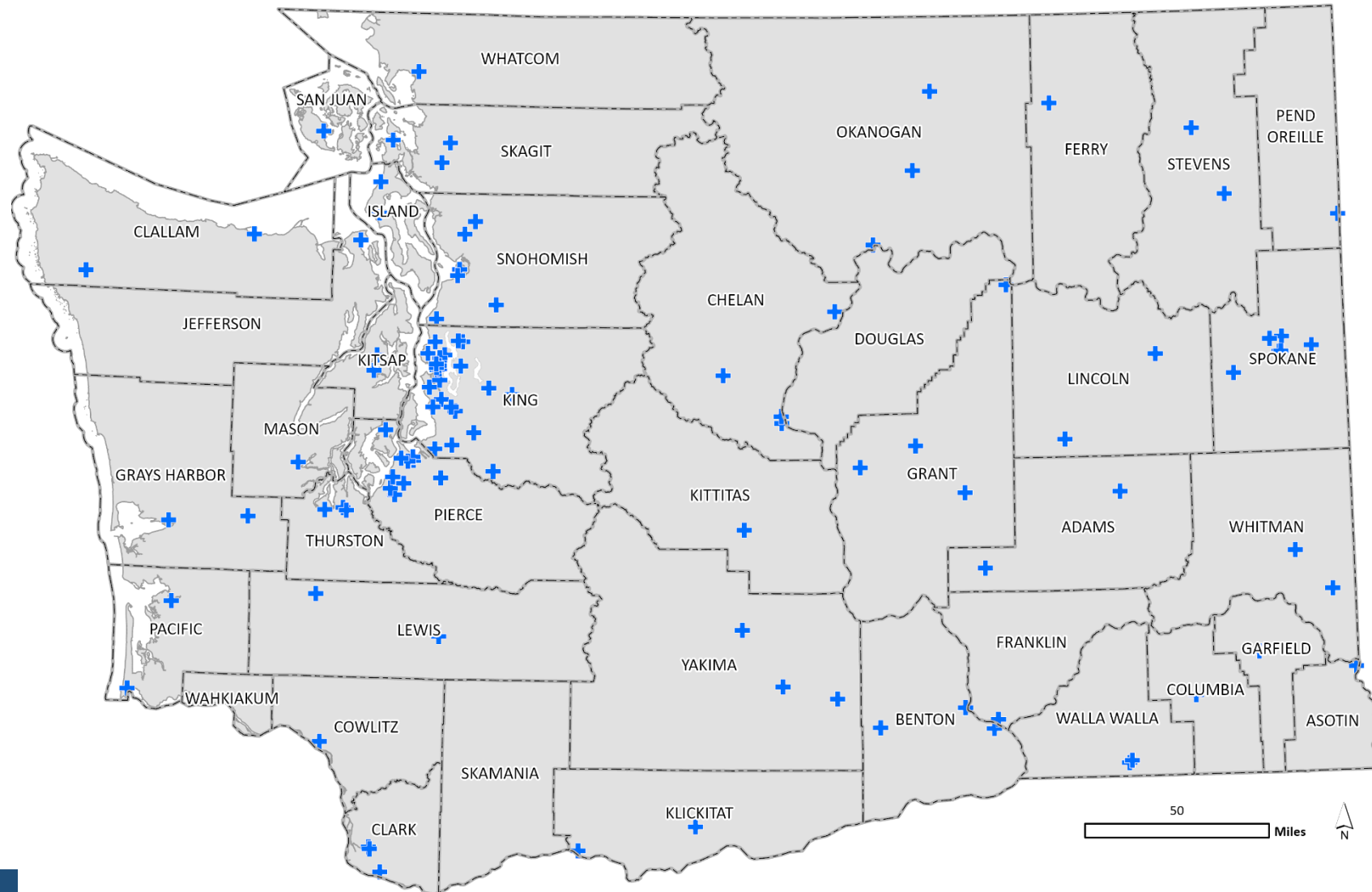
AS OF NOVEMBER 2022, TOTAL = 236



SOURCE: Washington State Department of Social and Health Services, Aging and Long-Term Support Administration Home and Community Services, accessed November 2022.

Hospital Locations in Washington State

AS OF July 27, 2023 TOTAL = 117

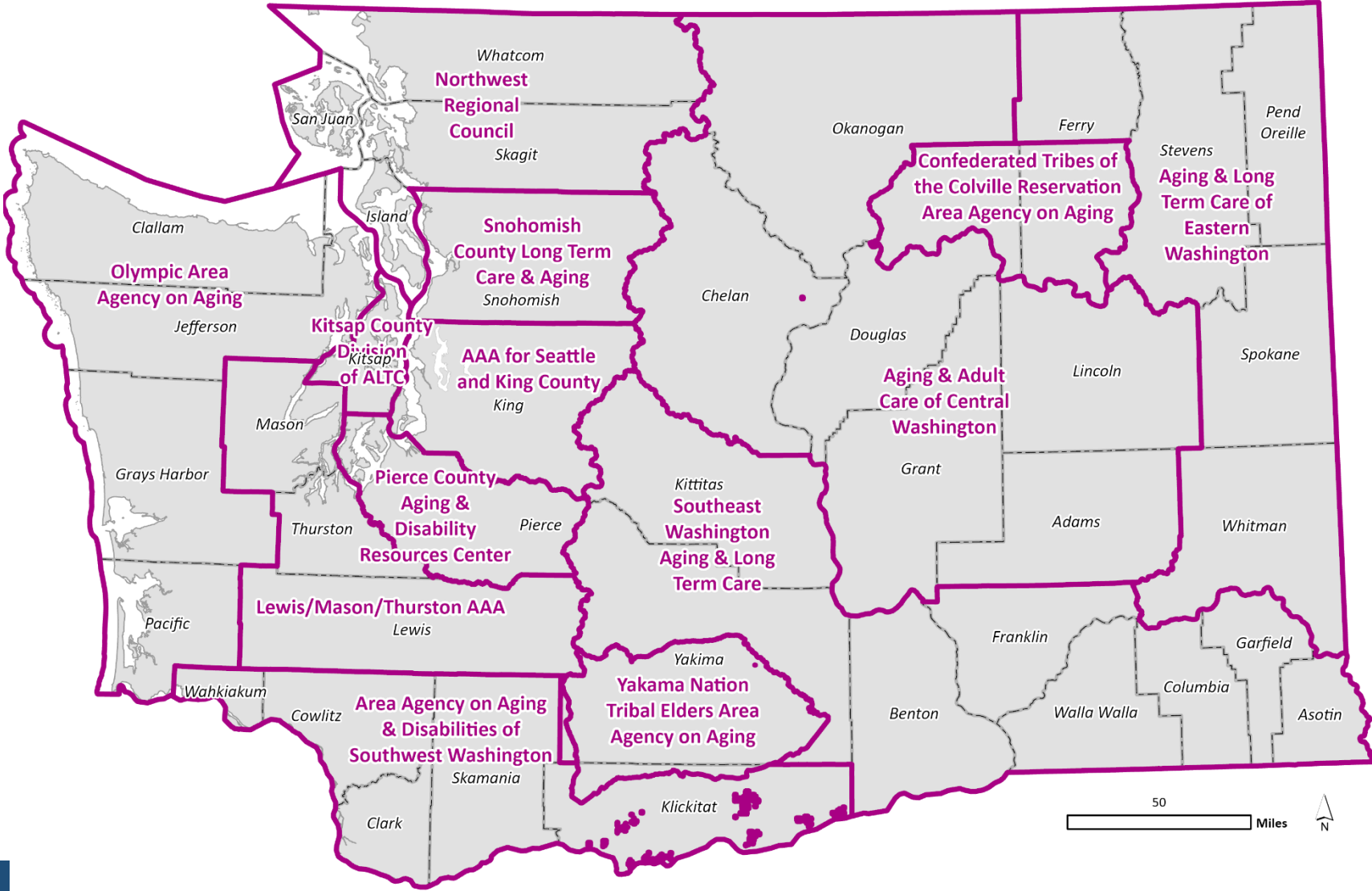


SOURCE: Washington State Department of Health, accessed July 27th, 2023

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Washington Area Agencies on Aging Planning Service Areas

AS July 27, 2023



SOURCE: DSHS Enterprise GIS Geospatial Data Library, accessed July 27th, 2023.

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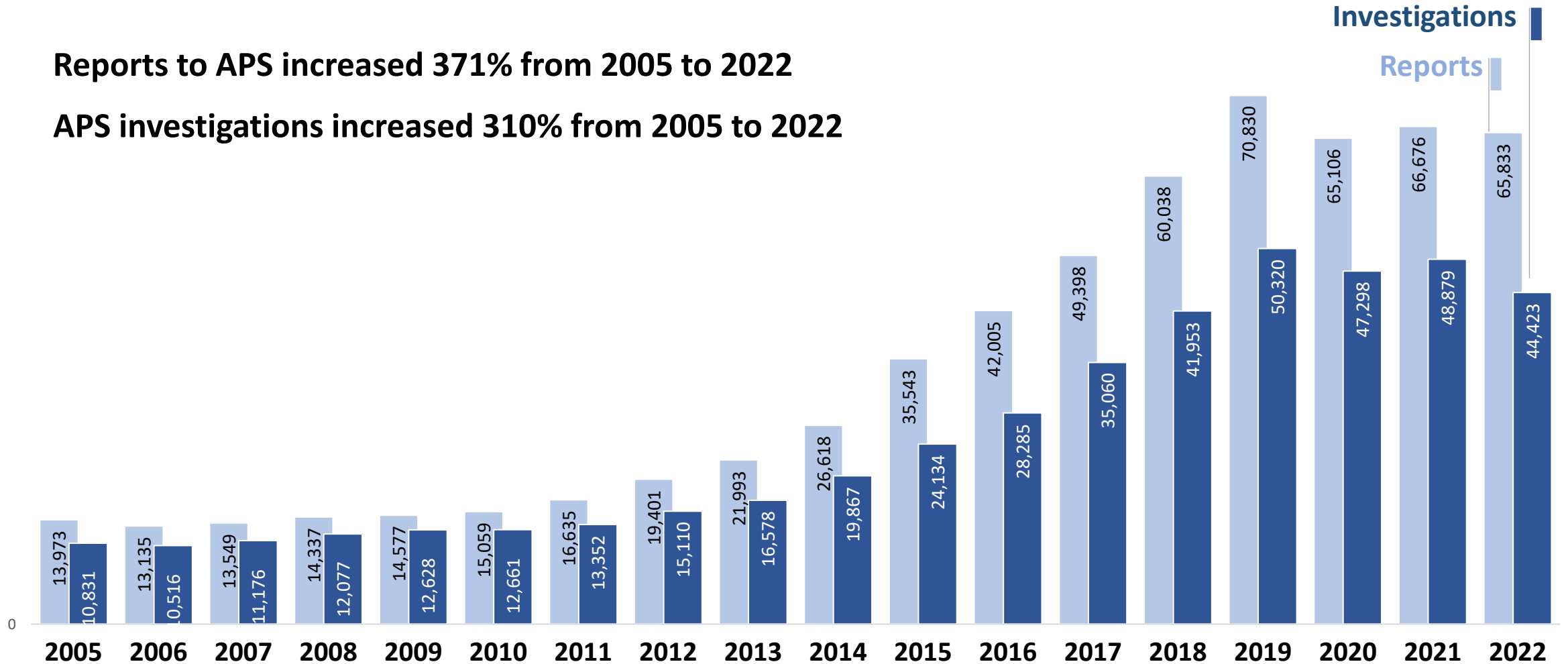
Facts About Older Adult Oral Health

- **Lack of dental insurance.** Many older Americans do not have dental insurance because the federal Medicare program does not cover routine dental care.
- **Untreated tooth decay.** Nearly all adults (96%) aged 65 years or older have had a cavity; 1 in 5 have untreated tooth decay.
- **Gum disease.** About 2 in 3 (68%) adults aged 65 years or older have gum disease.
- **Tooth loss.** Nearly 1 in 5 of adults aged 65 or older have lost all of their teeth. Having missing teeth or wearing dentures can affect nutrition, because people without teeth or with dentures often prefer soft, easily chewed foods instead of foods such as fresh fruits and vegetables.
- **Oral cancer.** Cancers of the mouth (oral and pharyngeal cancers) are primarily diagnosed in older adults; median age at diagnosis is 62 years.
- **Chronic disease.** People with chronic diseases such as arthritis, diabetes, heart diseases, and chronic obstructive pulmonary disease (COPD) may be more likely to develop gum (periodontal) disease, but they are less likely to get dental care than adults without these chronic conditions.

ALTSA Adult Protective Services Reports and Investigations Are Up More than Three-Fold Over the Past 17 Years

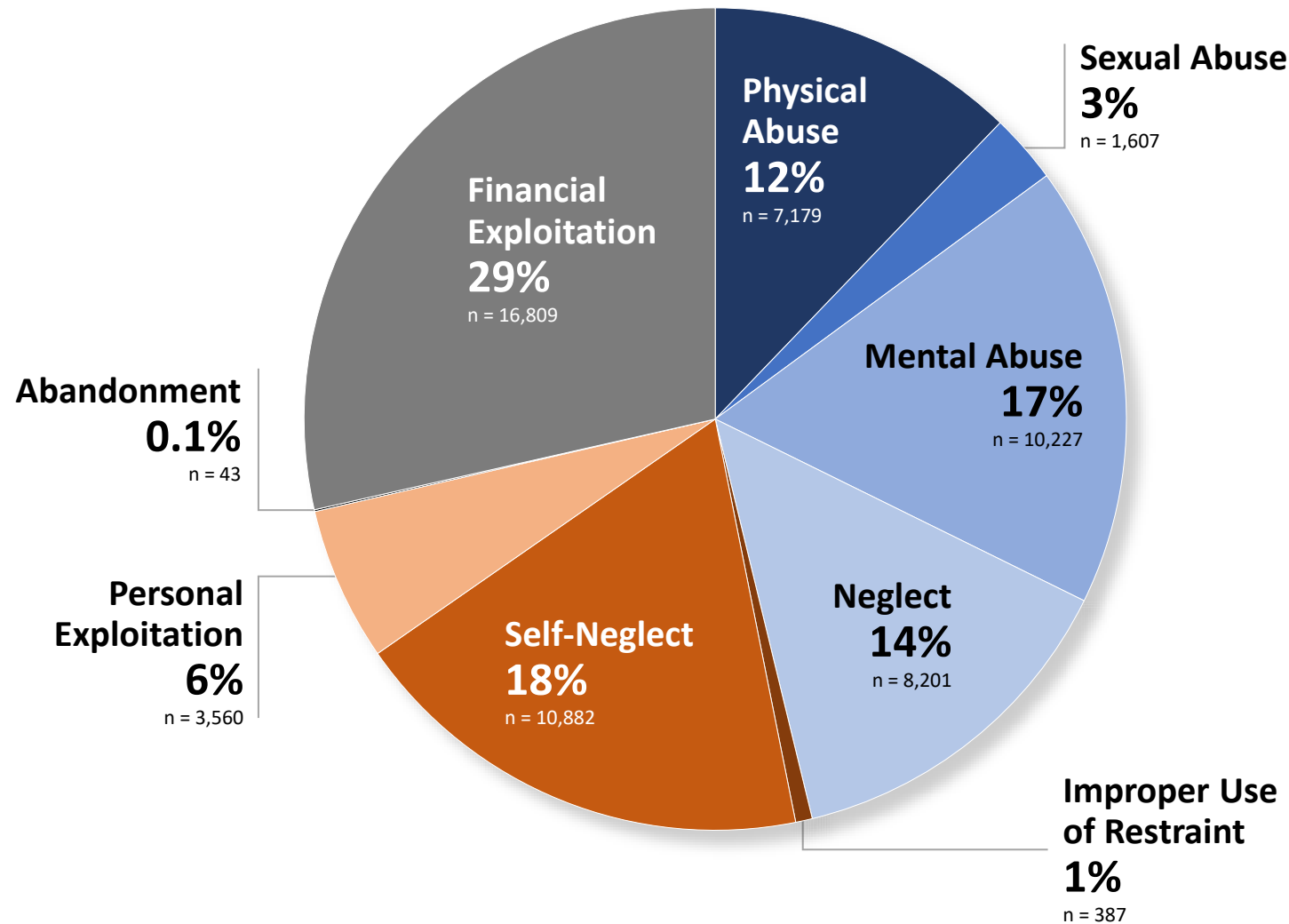
Reports to APS increased 371% from 2005 to 2022

APS investigations increased 310% from 2005 to 2022



AL TSA Adult Protective Services Investigated 58,895 Allegations in 2022

CALENDAR YEAR 2022

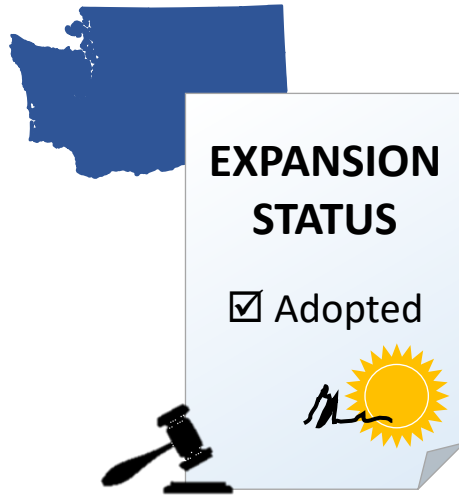


NOTE: A single investigation may cover multiple allegations.

SOURCES: CY 2022 allegations investigated data from TIVA2 DataMart. Tabulations prepared by AL TSA-APS.

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Medicaid in Washington State



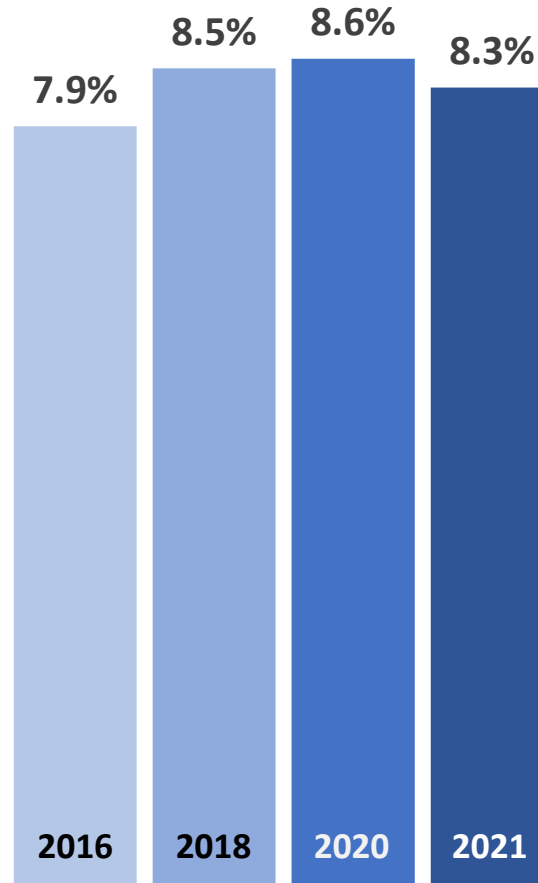
Adults in
Expansion Group



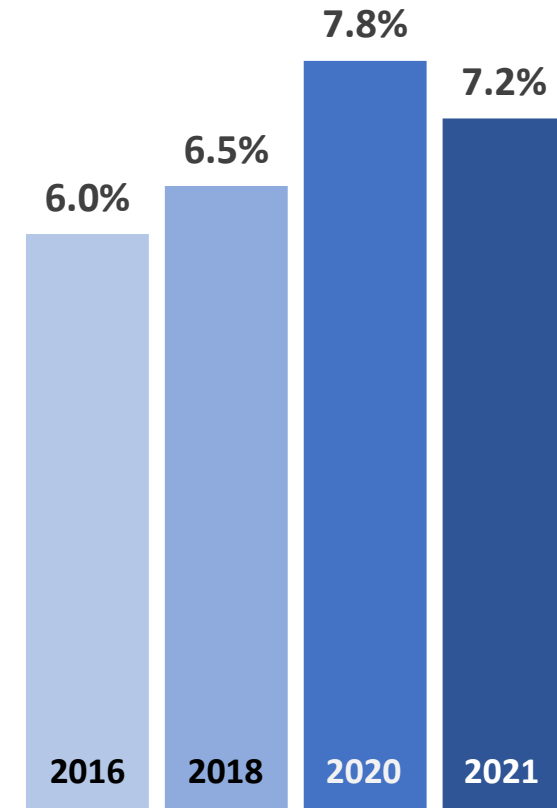
822,263

September 2022

Total Population Uninsured Rates



United States



Washington

Medicaid in Washington State

In Washington, Medicaid Covers:



1 in 6 adults
AGES 19-64



2 in 5 children
BIRTH THROUGH 18 YEARS



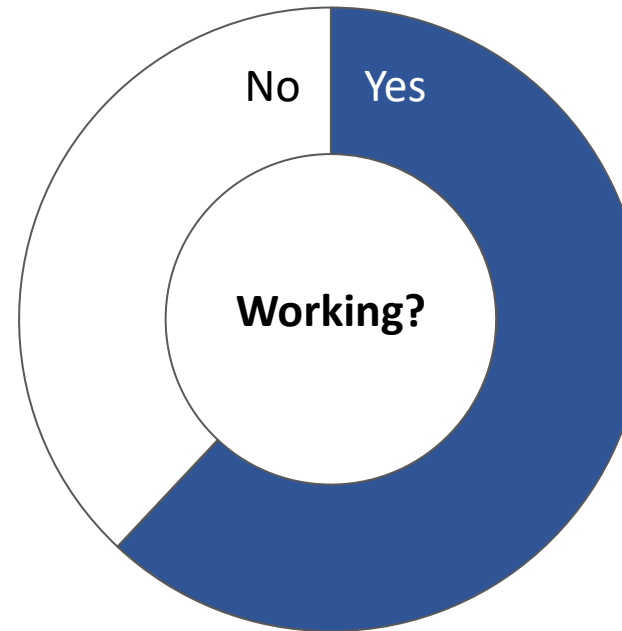
3 in 5 nursing home residents
ALL AGES



1 in 2 with disabilities
ALL AGES

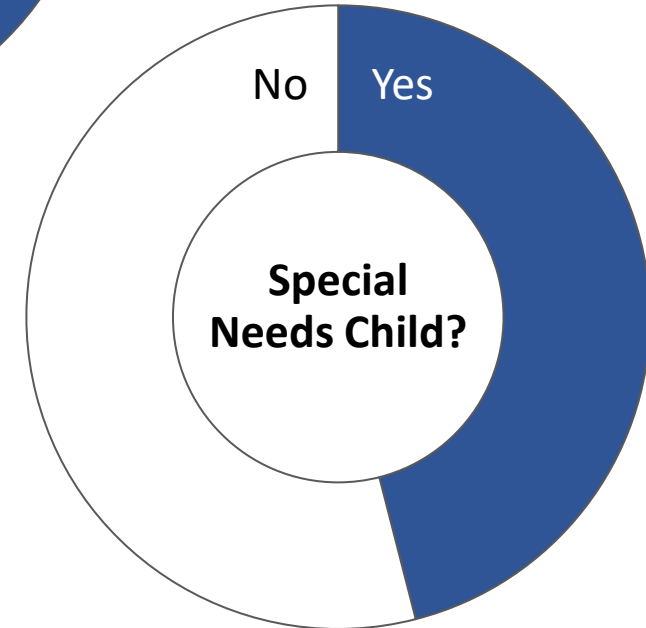


1 in 6 Medicare beneficiaries
ALL AGES



62%
of adult Medicaid enrollees
are working in Washington

46%
of children with special health
care needs are covered by
Medicaid in Washington



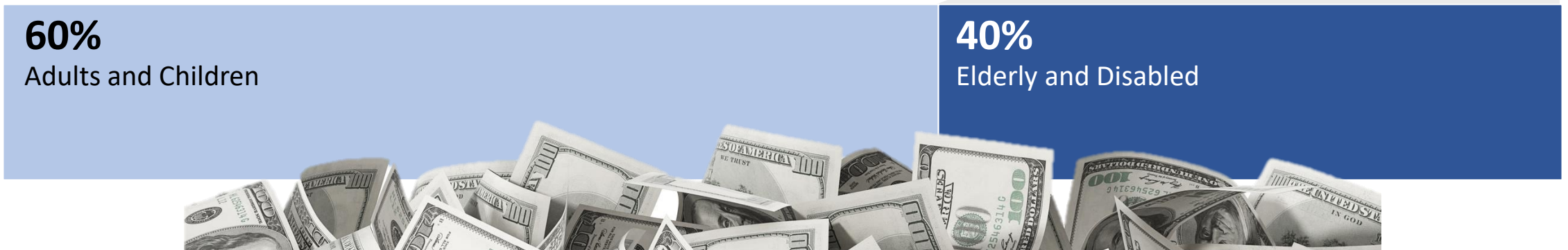
Medicaid in Washington State

2019 Washington Medicaid Enrollees and Expenditures

MEDICAID ENROLLEES



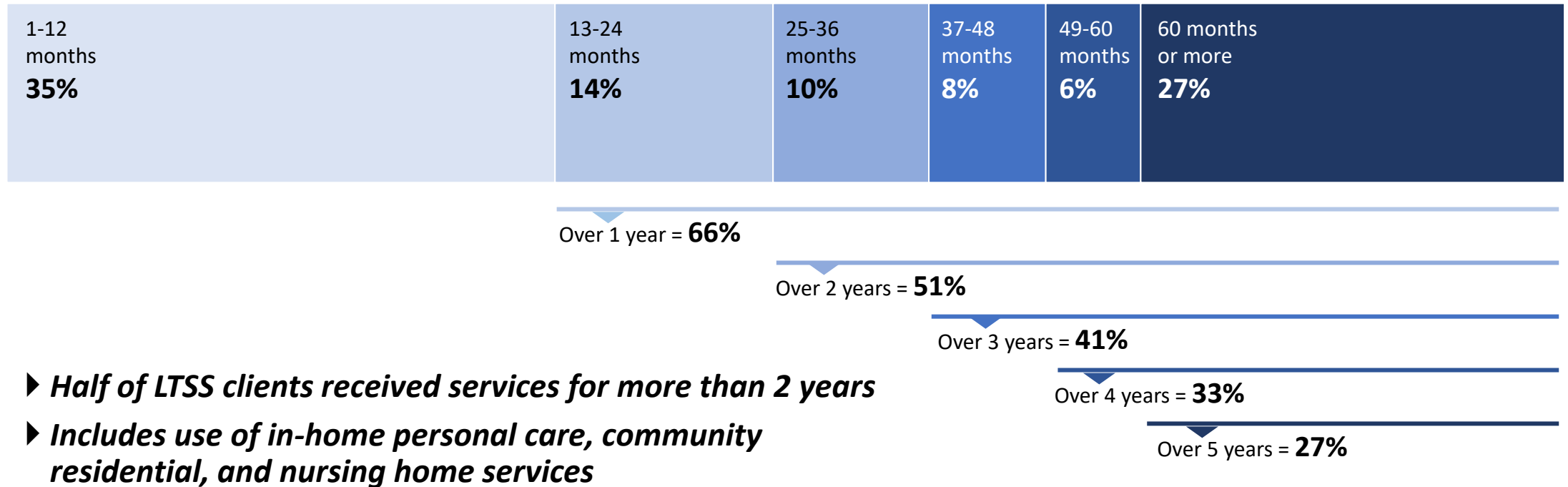
MEDICAID EXPENDITURES



Many People Rely on Medicaid-Paid LTSS Services for an Extended Period of Time

Distribution of LTSS Recipients by Number of Months of Service Use

SFY 2002-2005 Cohort (followed through June 2015)*



Washington State Broadband Office

October 2020 Update:
Broadband Accessibility and Digital Equity

Russ Elliott

DIRECTOR, WASHINGTON STATE BROADBAND OFFICE

OCTOBER 15, 2020

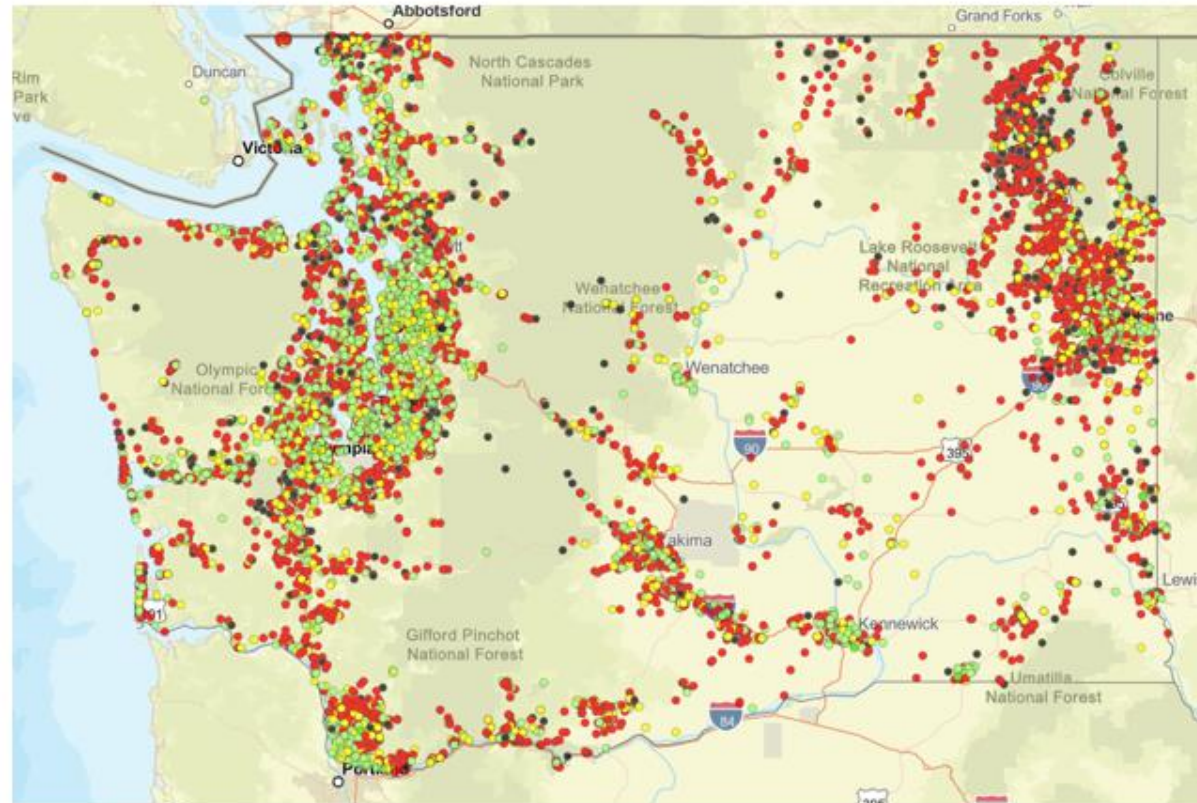


Washington State
Department of
Commerce

Statewide Broadband Survey

October 8, 2020

- **27,045**
Respondents
- **93% (25,240)**
Have broadband
- **37% (9,981)**
Less than 10 Mbps download
- **7% (1,805)**
No access
- **= 44% Unserved**
(less than 10 Mbps download)



No Broadband Access

Respondents can select multiple answers

October 8, 2020 (1836)

- Not available in area 49%
- No access 47%
- Too expensive 8%
- Don't know how to get 0.7%
- Don't have a computer 0.6%
- Can't use a computer 0.05%
- Worried about privacy 0.05%
- Don't need it/not interested
- Physical challenges
- Use public wifi instead

