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Gulf Coast Community Indicators Regional Overview

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Gulf Coast Community Foundation

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Introduction

Gulf Coast Community Indicators is a project of the Gulf Coast Community Foundation. The project aims to provide a common source of data and analysis on critical topics in order to inform community stakeholders, spur discussion and collaboration, and monitor and improve our quality of life.

The Gulf Coast Community Foundation (GCCF) pools donations and provides expertise to make lasting philanthropic impacts on the Gulf Coast. Founded in 1995 with profits from the sale of the Venice Hospital, the Foundation's assets have since grown to over \$230 million, with more than \$180 million in community grants made in that time. By combining donor funds with strategic planning, long-term investment, and cutting-edge projects, the Foundation magnifies and maximizes the philanthropic impact of citizens of the region.

This project was developed with assistance from the Center for Governmental Research (CGR), based in Rochester, NY. CGR is a nonprofit research and consulting firm that has created several community indicator projects in New York State, Tennessee, and other locations.

How is Our Region Doing?

Our 4-county region is vibrant in many ways, with a growing population, increasing diversity and a rebounding economy. Unemployment continues to fall, and average salaries are up. The region has recovered all of the jobs lost during the recession, and job growth has been strong in most sectors of the economy. Our population of young adults – in some ways the life blood of an economy – is growing at a higher rate than the state and nation. Our rate of obesity – a major measure of community health – is lower than the state and nation. Crime continues to fall and remains lower than the state as a whole. Voter participation has been and continues to be higher than for the state and nation. Measures of environmental conservation have improved, with more residents recycling, and a steep decline in water usage.

Yet, for all our successes, parts of our population are falling behind. Despite robust job growth, poverty in our region rose substantially along with the state and nation: almost 1 in 6 adults and almost a quarter of children live in poverty. In addition, a significant disparity in many measures of economic well-being exists between DeSoto and the rest of the region. Indicators of financial and social need, such as food stamp and Medicaid usage, have worsened across the region since 2000. On educational measures, our test results are flat, though our graduation rate has continued to improve over the past decade.

What do we need to change? Where should we focus our energies and resources? Read on for more data and analysis to inform your thinking and priorities.

Demographics

The face of our community is changing: key demographic indicators show that our population is growing—in size, age, and diversity.

The region's total population is growing in line with the state and faster than the nation. The population of our 4-county Gulf Coast region increased from 2000 through 2014. In 2014, the 4 counties combined had over 950,000 residents, up 25% from 2000. That slightly exceeded Florida's 24% growth rate and was almost double the national rate of 13%. In 2014, the Census Bureau announced that Florida had surpassed New York to become the third most populous state in the nation, up from 10th largest in 1960.

Sarasota and Manatee counties were the largest counties in the region by a significant margin, with 400,000 and 350,000 residents respectively. They also had the highest population growth rates, at 22% and 33% respectively. The cities in our region that grew the most from 2000 through 2014 were Venice (18%), Punta Gorda (20%), and North Port (164%). North Port grew from under 23,000 residents in 2000 to over 60,000 in 2014 and is now the largest city in the region.

Seniors 85 years and older were the fastest growing segment of the regional population from 2000 through 2014, increasing 62% over that period, while individuals 60 to 84 increased 33%. The group with the lowest rate of increase was the 20 to 39 age group, up 15% from 2000 through 2014. The rapidly growing number of seniors in the region will likely increase the demand for senior housing and elder care and support services.

The region has grown more diverse, and at a greater rate than Florida as a whole. From 2000 through 2014, the number of African American, Hispanic, and Asian residents increased faster than the number of white residents. The fastest growing population was Asian residents, increasing by 148%, followed by 117% growth among Hispanic residents and 44% growth among African American residents. The region is more homogenous than the state, though, with 89% white residents, compared to 78% in the state.

Single-parent families made up 38% of the region's families in 2010-14, similar to state and national figures. DeSoto had the highest rate, at 47%, and had the largest increase from 2000 through 2010-14 (up 15 points).

Economy and Workforce

A robust economy is a critical to our region's overall health and potential for growth. In this section, we track indicators related to job growth or decline, trends in salaries, and indicators of innovation such as high-tech jobs and STEM degrees.

Overall, many indicators of economic health in the Gulf Coast region show a robust and accelerating recovery. From 2000 through 2014, total jobs in the region increased 17%, greater than the nation, though less than the state. The region was hit hard by the recession, with total jobs declining 11% from 2007 through 2010; however, the region has regained all of its lost jobs and then some. Among the counties, jobs grew the most in Sarasota County from 2013 to 2014, at 4.6%.

The unemployment rate in our region fell to 5% in 2014, down 7 percentage points from the recession-era high in 2010. The Gulf Coast felt the effects of recession more keenly than the state and the nation, with higher unemployment rates from 2009 through 2011. However, since 2012, the region's unemployment rate has dropped 3.5 percentage points, compared to declines of 3.1 points in the state and 2.8 points in the country. In 2015, the unemployment rate was lower in the region than the nation and state for the second year in a row.

The region's labor force grew by 1.7% from 2014 to 2015, the sixth consecutive year of labor force growth. This was larger than increases at both the state and national levels.

The number of businesses on the Gulf Coast increased by 2.0% from 2013 to 2014, even with the state rate but more than double the national rate. Manatee has generally added businesses at the highest rate of the counties of the Gulf Coast. Every county besides DeSoto added jobs from 2013 to 2014.

From 2001 to 2014, the region experienced job growth in 10 of 12 sectors, and total jobs increased by 17%. Larger sectors with the strongest growth were Financial Activities (a 76% gain in jobs) and Health Care and Social Assistance (38%), while there were even larger gains in some smaller sectors such as Educational Services, which more than doubled. Manufacturing and Information sectors both lost jobs from 2001 to 2014 (by 18% and 2% respectively). The Gulf Coast's jobs picture largely mirrored national and statewide trends since 2001.

Salaries have also been growing, increasing 6% in the region between 2000 and 2014 after adjusting for inflation, on par with statewide and national increases. Average salaries in Sarasota increased 6%, compared with 1% in Charlotte, 8% in Manatee, and 13% in DeSoto. Salaries in the region were highest in the Financial Activities sector in 2014, at \$59,000.

We have room to improve in innovation-economy jobs. Indicators related to innovation include high-tech jobs, STEM degrees, and patents. About 4% of jobs in the region were high-tech jobs, substantially below statewide and national rates. Among the Gulf Coast counties, Manatee and Sarasota had the highest ratio of high-tech jobs, at 5% each in 2014. In 2011-13, 18% of adults in the region had a degree in a STEM field, compared with 19% statewide and 22% nationally. The rate of patents per 10,000 Gulf Coast residents was 1.7 in 2011, in line with the statewide rate but less than half the national rate. The county with the highest rate was consistently Manatee, with 2.4 patents per 10,000 residents in 2011.

The Gulf Coast region's workforce is increasingly well-educated. In 2010-14, 27% of Gulf Coast residents had a bachelor's degree or higher, an increase of 4 percentage points since 2000 and in line with statewide and national rates. The rate of residents without a high school diploma was 11% in 2010-14, lower than the statewide and national rates, both 14%, and down 6 points from 2000.

Our region is attracting young adults at a higher rate than the nation, but at a lower rate than the state. From 2000 to 2014, the number of residents between 25 and 34 years old in the Gulf Coast region increased by 17%. This growth was greater than the national figure (9%), but lower than the statewide rate (22%). Recent research shows that throughout the country, recent college graduates are more likely to prioritize living in urban areas with more amenities within walking distance than prior generations.

Looking at a broader grouping of working-age residents, we see that the Gulf Coast region has higher growth in younger working-age residents than both the state and the nation. From 2000 to 2014, the population of the Gulf Coast increased 36% in the 16-24 range, 3% in the 25-44 range, and 37% in the 45-64 range. The pattern of high growth in the youngest and oldest ranges was similar to patterns for the state and nation, though the region's growth in younger residents was larger than Florida's (29%) and much larger than the nation's (13%).

Education

The quality of our educational system has a great influence on the future health and well-being of our community, and it affects our ability to attract employers and new residents. In our region, more children are beginning their education at age 4 in preschool and completing high school, though disparities in performance on tests persist among racial and ethnic groups.

Like the rest of Florida, our region has expanded pre-kindergarten participation significantly, rising from 35% of 4-year-olds in 2006 to 77% in 2014. However, the rate fell by 4 points from 2013 to 2014, in contrast to yearly increases each year prior.

Overall, participation grew the most in Charlotte, from 33% in 2006 to 92% in 2014. Particularly important for low-income or at-risk children, pre-kindergarten helps prepare children for school both academically and socially, increasing their likelihood of success.

Overall student performance on state tests has remained steady since the introduction of a new testing system in 2011. In 2014, 59% of third-graders in the region passed the reading test, a critical milestone for children. By third grade, children who are behind in reading are likely to continue to fall behind in their schooling. The same year, 58% of the region's third-graders passed the state's math test. Eighth-grade results were similar, with 59% of students passing reading and 58% passing math.

Among the counties and among racial and ethnic groups, however, there were more differences in performance. Sarasota County consistently posted the highest passing rates, and DeSoto the lowest. Asian and white students passed at higher rates than African-American and Hispanic students on the third-grade tests. For example, just 34% of African-American and 43% of Hispanic third-graders passed the reading exam in our region, compared with more than 70% of white and Asian students.

A higher share of students is successfully completing high school, a critical step toward a successful adult life. The cohort graduation rate, measuring the share of students entering ninth grade and graduating after four years, increased from 60% in 2003 to 77% in 2015. Over the same period, Florida's rate increased from 56% to 78%. Each county's rate increased over that period, by the most in Manatee (20 points).

In 2014, 59% of the region's high school graduates had enrolled in a postsecondary institution by the fall of their graduation year, below the state rate of 63%. Adults with college degrees can often command higher salaries and attain higher standards of living, so college enrollment is an important measure. From 2010 to 2014, each county lost ground on this indicator, except DeSoto, which had the lowest, steady rate at about 50%.

Certain technological fields represent areas of focus and growth for our region and will play an important role in our region's future economy. These include information technology, animation, interactive technology, video graphics and special effects, and game and interactive media design. In 2014, our region awarded 9.2% of bachelor's degrees in these areas, much higher than state and national rates. Sarasota County's rate was highest in the region at 18%.

Financial Self-Sufficiency

The ability of individuals and families in a region to support themselves is an essential measure of a community's well-being. The indicators tracked in this section relate to measures of prosperity and need among Gulf Coast residents, and show the continued impact of the Great Recession on our region.

Our financial indicators show households have lower incomes and are more reliant upon the government for help. The region's 2010-14 median household income of \$48,000 was down 14% from 2000, on par with the state and more than the nation (down 10%).

Poverty has increased for children and adults. In 2010-14, 13% of the region's residents and 23% of its children were living in poverty – up from 9% and 15% respectively in 2000. In DeSoto County, 31% of residents and 44% of children were living in poverty, about twice the statewide rates. About 4% of residents who are employed earn at or below the poverty line, similar to the state and national rates.

More of our residents need government help to meet basic needs. In 2014, 13% of Gulf Coast residents received food stamps, up from 3% of residents in 2000. The rate of residents receiving public assistance was 4.2 per 1,000 residents in 2014, up from 2.3 in 2007. The combined total in financial assistance to needy residents (including welfare/Temporary Assistance, Medicaid, unemployment, and food stamps) was \$1,400 per resident in 2014, up 89% from 2000. This figure increased sharply in the worst years of the recession, from \$990 in 2007 to \$1,460 in 2011, but decreased slightly in 2012 and 2013 as the recovery began.

Housing is increasingly unaffordable for residents. The median home value in the region was \$160,000 in 2010-14, up 3% from 2000. The ratio of home value to income was 2.9 in 2010-14, at the high end of the range considered affordable and up 30% since 2000.

Rental housing has also grown more expensive. In 2010-14, renters in the region spent 33% of their income on rent, up from 27% in 2000. Rent is considered affordable if it consumes less than 30% of income.

Health

The health of our community is key to the region's well-being and vitality. Our access to care, the cost of care, and our behavioral health – inextricably linked to physical health – are all vital to understanding the picture of health in the Gulf Coast region.

Nearly a quarter of our region's residents were without health insurance in 2013, above the national rate. The rate of residents under 65 without health insurance was 24% in the region in 2013, the same as the state rate but 7 points higher than the national rate. Uninsured individuals may forego routine preventive care, which can lead to more serious and expensive medical problems. People without health insurance are also more susceptible to financial ruin and bankruptcy. However, forthcoming data may show a significant reduction in the number of uninsured as a result of the implementation of the Affordable Care Act (often known as Obamacare).

The rate of Gulf Coast residents on Medicaid has increased. In 2014, 13% of the region received health insurance through Medicaid, the government-funded insurance program for the poor and disabled. While this was an increase of 3 points from the region's 2009 rate, it was still lower than the state rate in 2014 (18%).

Medicare costs have risen 13% in the region since 2003, slightly lower than the state and in line with the national rate. Costs peaked during the recession, and have declined slightly in recent years. Medicare spending is a strong indicator of overall health care spending, and sheds light on the costs associated with an aging population.

Our region has a lower obesity rate than Florida and the nation, but a comparable rate of overweight adults. In 2013, 24% of residents were obese, compared with 26% of state residents and 29% of national residents. However, 37% of regional residents were overweight, in line with the state and nation. While state and national rates of obese and overweight adults have increased since 2002, the regional rate has remained steady. In contrast, obesity rates among teens on the Gulf Coast have worsened, rising from 11% in 2006 to 13% in 2012.

Our region lags behind the state in pregnant women receiving prenatal care early in their pregnancies. Prenatal care to women beginning in the first trimester of a pregnancy is key to reducing the risk of complications during pregnancy or birth and improving birth outcomes. In 2014, 75% of the region's new mothers received prenatal care before their 13th week, compared with 80% of new mothers statewide.

The rate of adults in the region binge drinking has increased, but teen alcohol use has declined. Adults on the Gulf Coast reported engaging in binge drinking at a rate of 18% in 2013, a practice which can be highly damaging to physical and emotional health. This was an increase of 3 points from 2002. However, the rate of teens reporting alcohol use has dropped sharply, from 39% in 2000 to 23% in 2014.

The Gulf Coast has a higher suicide rate than the state. There were 16 suicide deaths per 100,000 residents in our region in 2014, compared to 14 deaths statewide. The region has experienced a higher suicide rate than Florida every year since 2000.

The average rate from 2000 to 2008 was 15, while the average from 2009 to 2014 was 17.

Quality of Life

What makes the quality of life in a community great? Is it safety, affordability, natural beauty, culture, civic engagement, and a feeling that the people who live there are connected to and care about each other? In this section, we present indicators tracking many of those often difficult-to-measure elements that add up to a great place to live.

Measures of community engagement were fairly strong in the Gulf Coast region. Voter participation was higher in the region than in Florida or the United States, with 45% of voting-age residents participating in the 2014 midterm election, above the 38% for the state. For the last presidential election in 2012, 60% of regional adults participated, versus 56% for the state and 54% for the nation. Sarasota County tended to have the most participation among the regional counties.

More residents in our region engage in community service than in Florida as a whole. In 2014, 25% of residents volunteered their time, higher than the statewide rate and up from 21% in 2010. However, charitable giving has declined slightly in recent years, falling to 2.1% of total income from 2.4% in 2002. This was consistent with state and national trends.

The Gulf Coast's natural beauty is one of its most prized assets, from its temperate climate to parks and trails to beautiful beaches. Nearly a quarter of the region's land is dedicated to conservation and recreation, with higher shares in Charlotte (41%) and Sarasota (31%) counties. Access to beaches is maintained, with water sampling rarely finding contamination that would require closures. In 2013, 4% of water samples from beaches in Charlotte County exceeded safety levels, compared with 3% at Sarasota County beaches and 2% at Manatee County beaches.

In 2014, almost half of the municipal solid waste in our region was recycled. In 2014, 48% of solid waste produced in the region was recycled, slightly down from 51% in 2013 but up from 29% in 2000. The region's recycling rate was above the state's rate of 39%, and recycling rates were especially high in Sarasota County (53%) and Manatee (48%), while much lower in DeSoto (19%).

Water in our region is also being conserved, as average daily per-person use has fallen from 64 gallons in 2000 to 35 gallons in 2010.

Getting around the region continues to be car-focused and less time-consuming than larger metro areas. About 85% of workers drove to work alone (as opposed to carpooling) in 2010-14, on par with the state rate and above the national rate of 80%. The average commute time was 23 minutes, below the state and national averages of 26 minutes. Bicyclists fare better in the region – 2.7 injuries or fatalities per 10,000 residents – than the state, with a rate of 3.6.

Our arts and cultural attractions are a vital part of our community, and an increasing number of people are attending the variety of venues and events. Attendance at arts and cultural attractions topped 2.3 million in 2013-14, an increase of 5% over the previous year and 21% over 2010-11. In 2013, consumer spending on arts and culture totaled nearly \$330 million, or \$354 per resident. Sarasota County's spending was higher at \$402 per person. Relatively few residents make their living in arts and culture, however, which accounted for 0.5% of total jobs in 2014, less than half the state rate of 1.1%.

The Gulf Coast region is increasingly safe and experiences less crime than the state or nation. The region's rate of crimes against people (murder, rape, robbery, and assault) was 36 per 100,000 residents in 2014, 21% less than the statewide rate of 46 and a 38% decline from 2000. The rate of crimes against property (burglary, larceny, motor vehicle theft) followed a similar pattern: the 2014 regional rate of 238 per 100,000 residents was 19% lower than the statewide rate, and has fallen 34% since 2000.