

Gulf Coast Community Indicators

Regional Overview

May, 2018



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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 31% growth in population since 2000 – double the national rate and even exceeding the state's robust growth. This growing population is aging and growing more ethnically diverse, in line with national trends. Total jobs have increased, recovering recession-era losses, and average salaries are rising quite a bit faster than inflation.

Yet, the prosperity of our community is not felt by everyone. Poverty has been increasing, housing is increasingly unaffordable, and students are not achieving at equal rates across communities and racial and ethnic groups, and food stamp and Medicaid usage has increased.

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 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 2016. In 2016, the 4 counties combined had over 1,000,000 residents, up 31% from 2000. That exceeded Florida's 29% growth rate and was double the national rate

of 15%. 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 over 413,000 and 376,000 residents respectively. They also had the highest growth rates, at 27% and 42% respectively. The cities in our region that grew the most from 2000 through 2016 were Venice (22%), Punta Gorda (28%), and North Port (182%). North Port grew from under 23,000 residents in 2000 to over 64,000 in 2016 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 2016, increasing 74% over that period, while individuals 60 to 84 increased 45%. The group with the lowest rate of increase was the under 20 age group, up 18% from 2000 through 2016. 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 2016, 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 174%, followed by 135% growth among Hispanic residents and 49% 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 37% of the region's families in 2012-16, similar to state and national figures. DeSoto had the highest rate, at 42%, but had the largest decrease from 2007-11 through 2012-16, decreasing from 46%.

Economy and Workforce

Overall, many indicators of economic health in the Gulf Coast region show a **growing recovery**. From 2000 through 2016, total jobs in the region increased 20%, greater than the nation, though less than the state. The region was hit hard by the recession, with total jobs declining 12% from 2007 through 2010. But it has recovered in recent years, gaining back 12% of those jobs through 2013. Jobs grew the most in Charlotte County from 2015 to 2016, at 3%.

The [unemployment rate](#) in our region fell to 4% in 2017, down almost 8 percentage points from 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. Since 2012, the region's unemployment rate has dropped over 4

percentage points, similar to declines in the state and country, and our region now has a slightly lower unemployment rate than the state and the nation.

The region's [labor force](#) increased 2.4% in 2017. This was similar to the increase at the state (2.6%) and higher than the national levels (0.7%).

The [number of businesses](#) on the Gulf Coast increased 1.9% in 2016, lower than the state and national rates. Manatee has generally added businesses at the highest rate of the counties of the Gulf Coast since 2000.

From 2001 to 2016, the region experienced job growth in [9 of 12 sectors](#), and total jobs increased by 29%. The strongest large sectors were Financial Activities (a 79% gain in jobs) and Health Care and Social Assistance (44%), along with big gains in some smaller sectors such as Educational Services, which more than doubled. Sectors losing jobs included Information (-2%) and Manufacturing (-12%). The Gulf Coast's jobs picture largely mirrored national and statewide trends since 2001. Manufacturing jobs declined by 23% in the nation and 12% in Florida from 2001 to 2016, while Construction jobs rose by 3% in the country and 12% in Florida but rose 18% in the region over the same time period.

[Salaries](#) have also been growing, increasing 11% in the region between 2000 and 2016, even after adjusting for inflation. That was tantamount to the statewide and national increases. Average salaries in Sarasota have increased 10%, compared with 5% in Charlotte, 15% in Manatee, and 13% in DeSoto. Salaries in the region were highest in the Financial Activities sector in 2016, at \$62,600.

We have room to improve in innovation-economy jobs. Indicators related to innovation include high-tech jobs, STEM degrees, and patents. About 5% of jobs in the region were high-tech jobs, substantially less than the statewide and national rates. Among the 4 Gulf Coast counties, Manatee and Sarasota had the highest ratio of high-tech jobs, at 5% each in 2016. In 2016, 19% 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 2015, in line with the statewide rate but less than half the national rate. The county with the highest rate was consistently Manatee, with 2.8 patents per 10,000 residents in 2015.

The Gulf Coast region's [workforce is increasingly well-educated](#). In 2012-16, 28% of Gulf Coast residents had a bachelor's degree or higher, an increase of 5 percentage points since 2000 and in line with statewide and national rates. The rate of residents without a high school diploma was 10% in 2012-16, lower than the statewide and national rates, both 13%, and down 7 points from 2000.

Our [region is attracting young adults](#) at a higher rate than the nation, but a lower rate than the state. From 2000 to 2016, the number of residents between 25 and 34

years old in the Gulf Coast region increased by 26%. This growth was greater than the national figure (12%), but lower than the statewide rate (29%). 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 2016, the population of the Gulf Coast increased 38% in the 16-24 range, 8% in the 25-44 range, and 44% 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 (27%) and much larger than the nation's (11%).

Education

Like the rest of Florida, our region has expanded [pre-kindergarten participation](#) significantly, rising from 35% of 4-year-olds in 2006 to 70% in 2016. Participation grew the most in Charlotte, from 33% in 2006 to 77% in 2016. 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.

In 2015 Florida switched its testing program to the Florida Standards Assessment, aligned with new state standards emphasizing analytical thinking. In 2017, 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, 60% of the region's [third-graders passed the state's math test](#). Eighth-grade results were similar, with 56% of [students passing reading](#) and 61% [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 36% of African-American and 42% of Hispanic [third-graders passed the reading exam](#), compared with more than 73% of white and 81% of 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 82% in 2016. Over the same period, Florida's rate increased from 56% to 81%. Each county's rate increased over that period, by the most in Manatee and Sarasota counties (25 percentage points each).

In 2015, 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 62%. 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 2015, each county lost ground on this indicator.

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 2016, our region awarded 13% of bachelor's degrees in these areas, much higher than state and national rates. Sarasota County's rate was highest in the region at 26%.

Financial Self-Sufficiency

Our financial indicators show households have lost ground against inflation and are more reliant upon the government for help. The region's 2012-16 [median household income](#) of \$48,990 was down 14% from 2000, a bit more than the loss at the state (13%) and national (9%) levels.

Poverty has increased. In 2012-16, 13% of the [region's residents](#) and 22% of its [children were living in poverty](#) – up from 9% and 15% in 2000. In DeSoto County, 30% of residents and 43% of children were living in poverty, about twice the statewide rates. About 3.2% of residents in the region [who are employed have incomes below the poverty threshold](#), lower than the state and national rates.

More of our residents need government help to meet basic needs. In 2016, 11% of [Gulf Coast residents received food stamps](#), up from 3% of residents in 2000. The rate of residents [receiving public assistance](#) was 3.7 per 1,000 residents in 2016, up from 2.3 in 2007. Put another way, the combined total in financial assistance to needy residents (including welfare/Temporary Assistance, Medicaid, unemployment, and food stamps) was \$1,340 per resident in 2016, up 75% from 2000. This figure increased sharply in the worst years of the recession, from \$1,000 in 2007 to \$1,480 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 \$162,000 in 2012-16, up 3% from 2000. The ratio of home value to income was 3.1 in 2012-16, just outside the 2-3 range considered affordable and up 38% since 2000.

Rental housing has also grown more expensive. In 2012-16, renters in the region spent 33% of their income on rent, up from 27% in 2000. Rent is considered affordable

Health

One out of six of our [region's residents were without health insurance](#) in 2015, above the national rate. The rate of residents under 65 without health insurance was 17% in the region in 2015, similar to the state rate but 6 points higher than the national rate. Uninsured individuals may forgo 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.

The rate of [Gulf Coast residents on Medicaid](#) is increasing. In 2016, 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 4 points from the region's 2009 rate, it was still lower than the statewide rate of Medicaid enrollment in 2016, 19%.

[Medicare costs](#) have risen 12% in the region since 2003, slightly higher than the state and 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. In 2016, 24% of residents were obese, compared with 27% of state residents and 30% of national residents. However, 39% of regional residents were overweight, above the state and nation. While state and national rates of obese and overweight adults have increased since 2002, the regional rate has remained steady. On the other hand, obesity rates among teens on the Gulf Coast have worsened over a similar period, rising from 11% in 2006 to 14% in 2016.

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 2016, 75% of the region's new mothers received prenatal care before their 13th week, compared with 78% 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 17% in 2016, a practice which can be highly damaging to physical and emotional health. This was an increase of 1 point from 2002. However, the rate of teens reporting alcohol use has dropped sharply, from 39% in 2000 to 17% in 2016.

The Gulf Coast has a [higher suicide rate](#) than the state. There were 19.6 suicide deaths per 100,000 residents in our region in 2016, compared with 14 deaths statewide. The region has experienced a higher suicide rate than Florida every year

since 2000, and has increased from an average of 15 suicide deaths per 100,000 residents in 2000-2008 to 18 in 2009 through 2016.

Quality of Life

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 62% of voting-age residents participating in the 2016 presidential election, above the 58% rate for the state. 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 2015, 26% of residents volunteered their time, higher than the statewide rate and up from 21% in 2010. However, Gulf Coast residents have slipped in recent years in charitable giving, falling to 2.0% of total income from 2.2% 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 2016, over half of the municipal [solid waste in our region was recycled](#). In 2016, 58% of solid waste produced in the region was recycled, up from 39% in 2012 and 29% in 2005. The region's recycling rate was above the state's rate of 44%, and recycling rates were especially high in Sarasota County and Charlotte (60% and 69% respectively), while much lower in DeSoto (38%).

[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 86% of [workers drove to work alone](#) (as opposed to carpooling), similar to the state rate (84%) and above the national rate of 80%.

The [average commute time](#) was 24 minutes, below the state and national averages of 27 and 26 minutes respectively. [Bicyclists face hazards](#) on the roads, but are higher in Sarasota County, where the rate of bicyclist injuries or fatalities was 4.3 per 10,000 residents in 2016, above the rates for the region (3.7) and state (3.3).

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 2.5 million in 2014-15, an increase of 11% over the previous year and 35% over 2010-11. In 2015, consumer spending on arts and culture totaled nearly \$400 million, or \$416 per resident. Sarasota County's spending was higher at \$451 per person. Relatively few residents [make their living in arts and culture](#), however, which accounted for 0.5% of total jobs in 2015, less than half the state share 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 32 per 100,000 residents in 2016, 25% less than the statewide rate of 43 and a 45% decline from 2000. The rate of [crimes against property](#) (burglary, larceny, motor vehicle theft) followed a similar pattern. The 2016 regional rate of 193 per 100,000 residents was 28% lower than the statewide rate and 46% below the region's rate in 2000.