

# EXECUTIVE SUMMARY

## COLLIER COUNTY: COMMUNITY NEEDS AND ASSETS ASSESSMENT



**Q-Q RESEARCH**  
consultative

# EXECUTIVE SUMMARY

Welcome to the 2017 Collier County Community Needs and Assets Assessment (CNA). The CNA offers a portrait of Collier County and the needs of its residents by presenting data on demographic and socioeconomic characteristics, as well as an appraisal of economic, physical, service, and social environments. The CNA also moves beyond specifics to provide a broader analysis regarding foundational issues that impact quality of life and assets found within the county.

The CNA addressed three primary objectives:

1. Identify and quantify the conditions, needs, and assets of the community,
2. analyze the access and delivery of resources to the county residents,
3. provide findings that will allow community leaders and members to develop priorities and strategies to address identified needs and gaps while utilizing and mobilizing existing resources.

The CNA employed a community based participatory approach engaging over 4,000 community members to achieve the following goals:

1. Identify the needs of all types of residents within Collier County, including those of special and vulnerable populations;
2. Identify assets found within Collier County;
3. Obtain data on populations for which we have little quantitative or qualitative data; and
4. Build relationships between the community and RMSFF.





In order to achieve these goals and objectives, the CNA involved three steps: 1) community engagement achieved by conducting surveys and focus groups, 2) assessment of prior reports, and 3) community need identification. The key insights discussed below can be used by stakeholders to make recommendations for collaborative action incorporating objectives and strategies to meet the identified needs of Collier County residents while leveraging existing assets.

The CNA identified needs and assets that impact the lives of Collier County residents in the following domains:

- |  |   |
|--|---|
| 1. Employment and Economic Opportunity | 6. Education and Other Social Services                        |
| 2. Housing                             | 7. Well-being and Community Cohesion                          |
| 3. Transportation/Infrastructure       | 8. Health and Health Behaviors                                |
| 4. Environment                         | 9. Recreation and Leisure<br>(including Culture and The Arts) |
| 5. Health Care                         | 10. Safety  |

In addition, the CNA identified a foundational issue contributing to local needs: economic barriers for residents.

Overall, the Collier County community is growing, aging and diversifying. Between 2010 and 2016 the population in Collier County grew by 12.9% to 365,136, out pacing population growth in Florida (9.2%). Collier is the 16th most populous county in the state, and by 2030, Collier County's population is expected to increase over 20%. The population of Collier County is considerably older than that of the State of Florida and is the 9th ranked county in Florida by percent of population ages 65 and over. The greatest population growth is anticipated to be among the 65-plus age group, with an expected increase from about 26% of the total population in 2010 to almost 34% in 2040. Though Collier County's population is mostly White, the county has a very diverse population of residents (64% identify as White only, 27% identify as Hispanic Latino, and 7% identify as Black/African American). Growth in the number of Hispanic/Latino, Black, and multi-ethnic residents is expected to continue on an upward trend between now and 2040.

## EMPLOYMENT AND ECONOMIC OPPORTUNITY

There is a large income gap between the richest and poorest residents of the county. Large segments of the population earn six-figures (28%), while a considerable percentage live below the federal poverty level (FPL) (17%). The top 1% of residents in the county have an average household income of \$4,191,055, while the bottom 99% have an average household income of \$57,258. The cost of living in Collier County is high for many residents. The minimum sustainable living wage for a family of 4 is estimated to be at \$66,127, higher than the average household income for the bottom 99%. A considerable percentage of families (34%) have difficulty meeting basic needs.

Although residents feel jobs are available, often times, income earned from employment isn't enough to meet needs. Many of the available employment opportunities often have a median wage below amount needed for self-sufficiency (\$15.90 hourly each for a family of 4, if both adults work). The greatest projected areas for job growth in the county are in industries that offer low wages, such as in the retail and service sectors. Job opportunities will be available in higher wage jobs (e.g., nursing, skilled labor), but these opportunities require additional training/education.

## HOUSING

Many residents and experts agree that Collier County residents have a hard time finding affordable housing. The average single-family home value in Collier County was estimated at \$573,519, which is much higher than the state average of \$219,681. About 40% of Collier County residents qualify as "housing-cost burdened", meaning they spend at least 30% of their available income on rent or mortgage, causing them to make difficult choices involving cutting back on other basic necessities. High housing costs can lead to poor housing conditions, which differentially impacts low-income residents. This can result in substandard housing which is a concern in the Immokalee area.

The high cost of living is driven by the housing costs. There is a lack of affordable houses on the market for sale and rent, and a lack of subsidized housing for the elderly and low-income resident. Community members stated that the housing costs drive many middle class and lower-income residents (including public service and service workers) to move to nearby counties and towns, like Lee and Lehigh, where they spend the earnings they made in Collier County.

## TRANSPORTATION AND INFRASTRUCTURE

Most residents in Collier County commute using their own vehicles and very few use public transportation, citing lack of options. Those who have to commute long distances to work have an additional transportation cost burden that can further impact quality of life. Traffic pattern fluctuations are seasonal, with traffic worsening during the peak season. Experts predict traffic in the western areas of the county will be above average until services in eastern parts of the county match the residential growth in those areas. Residents in zip codes west of Collier Blvd and in the northern parts of the county were most dissatisfied with traffic's effect on their daily lives. Focus group participants raised concerns about the lack of public transportation and the lack of safe walkable and bikeable pathways. However, results indicated that multi-modal forms of transportation (i.e., biking and walking) are not equally supported by the public; half of survey participants were satisfied with public transportation and felt that residents had access to transportation, while the other half disagreed. According to expert participants, roads in Collier County are at capacity, and more 4-6 lane roads are being built for a car-centric culture among residents.

Overall, residents in Collier County were generally satisfied with the cleanliness of their community and with the public space management. They believe that their communities are well-maintained (82%) and that they have access to clean outdoor facilities (81%). They reported being satisfied with public building maintenance (74%) and with maintenance of streets/roads (82%). This trend did not hold for the communities of Copeland, Chokoloskee, Everglades City, Goodland, and Immokalee, who were generally dissatisfied with the maintenance of their community. In addition, Copeland and Immokalee were also less satisfied with their air quality, water quality, and green spaces.

## ENVIRONMENT

There were several environmental concerns and issues raised by experts, including growth related environmental impact on land and wetlands and storm water drainage concerns. Experts were also worried that the focus on improving beach access and parking posed a threat to beaches. Finally, they were concerned about the lack of focus on sea-level rise by community leaders. More education/awareness on water quality, conservation and threats to the environment are needed for the general public to fully comprehend the risks to environment and how these issues affect their communities. Residents did voice concerns over pesticide and fertilizer pollution/runoff.

## HEALTH CARE

With regards to health care services, residents in Collier County voiced concerns related to primary care provider (PCP) availability and wait times (especially during peak season and for Medicare/Medicaid recipients). The lack of PCP providers is of particular concern in the Immokalee area. While there is a sufficient supply of dental care providers, residents are concerned with the affordability of services.

Residents are also worried about the lack of both mental health care and addiction treatment availability. Though the number of providers has increased in recent years, gaps in services remain, especially with respect to affordable assisted living options for residents with mental health issues. Community members felt that income determined both the access and quality of care one receives. Some residents voiced concerns regarding discrimination they experienced firsthand within the healthcare system. Undocumented workers in agricultural areas are particularly concerned about access to services given the current political climate surrounding immigration.

## EDUCATION AND OTHER SOCIAL SERVICES

In general, parents were very satisfied with the quality of educational options. They felt that the available preschool and K-12 education programs are of high quality. However, parents in many areas of the county cited a lack of affordable child care and preschool options, indicating that the quality options are out of their budget. Additionally, residents cited that post-secondary options, including vocational training, were an area of need. In some instances, residents were aware of existing opportunities, but could not take advantage of them due to transportation issues. Immokalee residents were concerned with the lack of capacity in quality preschool and afterschool programs. Many residents in these areas turn to unlicensed providers for this care if quality programs are unavailable. Residents in Immokalee were also concerned with high teacher turnover, especially in the middle schools. With respect to elder care, additional affordable assisted living facilities are needed to support and increasing elderly population. Residents in Copeland, Chokoloskee, Everglades City, Goodland and Immokalee pointed to a lack of social services for elderly residents.

## WELL-BEING AND COMMUNITY COHESION

Residents in Collier believe themselves to be mostly healthy, and the region exhibits a higher well-being score than that of the state. Southwest Florida is a participant in the Blue Zones Project, “a community-wide well-being improvement initiative” designed to “help make healthy choices easier” for Southwest Florida residents. As a result of these efforts, the well-being index in Southwest Florida has been increasing despite a reverse trend throughout the nation as a whole.

## HEALTH AND HEALTHY BEHAVIORS

Generally, residents who do struggle with their health tend to have issues with chronic illness, substance abuse and obesity. Regarding alcohol and drug abuse, it is estimated that about one-fifth of residents in Collier engaged in heavy drinking and a larger proportion of residents age 65 and over engage in these types of behaviors than the state. Approximately 67% of respondents agreed that residents in their community are generally more healthy. About half of participants indicated that residents struggled with alcohol use, illegal drug use, and prescription drug abuse in their communities. All the aforementioned health issues are of greater concern in the Immokalee area.

## RECREATION AND LEISURE

Community residents believe that they have adequate access to parks (84%), adequate access to beaches (81%), and adequate availability of arts/cultural programming (76%). Residents expressed concerns related to the affordability of recreational options. In general, Immokalee residents are more likely to disagree with statements regarding access to recreational activities.

## SAFETY

Collier County residents believe their communities to be largely safe and indicated that they were satisfied with emergency services. Residents are concerned with safety of pedestrians and bike riders, lack of lighting at night for drivers, and texting and driving, though 73% of residents felt safe driving. Again, Immokalee residents are more concerned with their safety than are most residents in Collier County. While residents seem to be aware of the many opportunities for recreation that exist in the community, many residents likely struggle with affordability and access to these activities.



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