

2022 – 2023
COLLIER COUNTY
COMMUNITY ASSESSMENT



ACKNOWLEDGMENTS

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RMSFF and its Community Assessment Advisory Committee guided the engagement and development of the 2023 Collier County Community Assessment in partnership with QQRC. RMSFF is a foundation that strives to improve the lives of others, particularly through investments in human and social services, education, and health and medicine within the five counties of Southwest Florida, including Collier County, along with the Twin Cities area of Minnesota.

In addition to committed community individuals, the following organizations were represented on the Advisory Committee.

Arthrex

Baker Senior Center Naples

CareerSource Southwest Florida

Collier Community Foundation

Collier County Community Redevelopment Agency—Bayshore and Immokalee

Collier County Emergency Management Services

Collier County Government

Collier County Public Schools

Collier County Sheriff's Office

Conservancy of Southwest Florida

Florida Department of Health—Collier County

Florida Gulf Coast University

Greater Naples Chamber

Greater Naples Leadership

Habitat for Humanity of Collier County

Healthcare Network

Naples Children and Education Foundation

Naples Daily News

NCH Healthcare System

Neighborhood Health Clinic

United Arts Collier

United Way of Collier and the Keys

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EXECUTIVE SUMMARY



Assessment Objectives and Goals

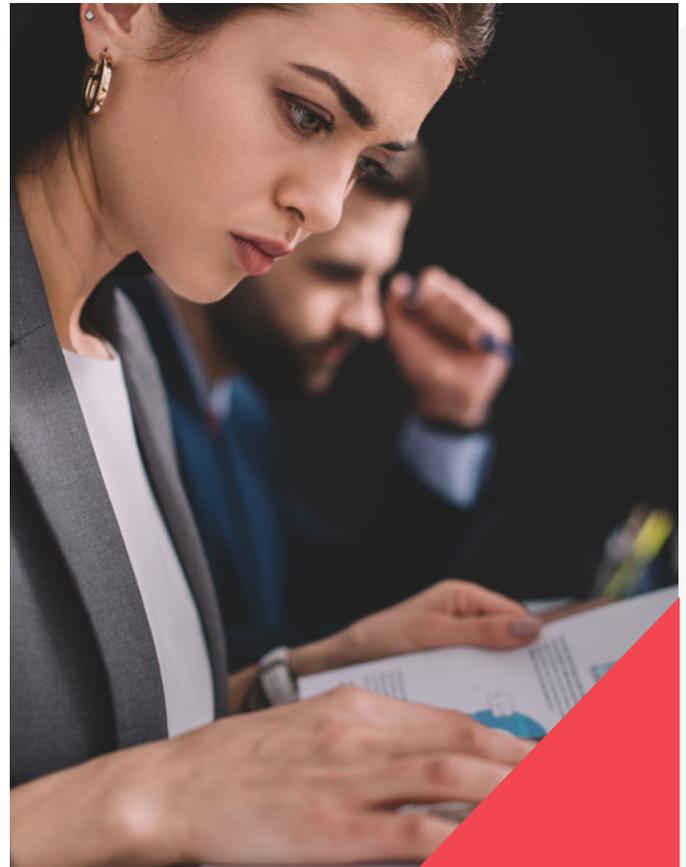
This Collier County Community Assessment (CCCA) offers a portrait of Collier County and the needs of its residents by presenting data on demographic and socioeconomic characteristics, as well as an appraisal of the economic, physical, service, and social environments, including the following seven domains: 1) Economic Opportunity and Employment, 2) Education, 3) Environment, 4) Health Care & Mental Health, 5) Housing, 6) Infrastructure and transportation, and 7) Special Populations. In alignment with the 2017-2018 CCCA, the purpose of this CCCA is to highlight critical barriers and challenges faced by Collier County residents and compare how these points have changed or stayed the same over time. This work ultimately seeks to address and provide updates on 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 to leaders and members of the Collier County community that will allow priorities and strategies to be developed that address identified needs and gaps, while also utilizing and mobilizing existing resources.**

The intended audiences of this report are people working to address various community issues, including community organizations and civic (RMSFF) looks forward to joining community stakeholders in utilizing this community assessment to continue to lead efforts to improve the quality of life in Collier County.

Methodological Approach

The same methodological approach as the 2017-2018 CCCA was taken for this report but refined in order to provide succinct updates and make comparisons when possible. More specifically, a comprehensive mixed-methods design was adopted, utilizing methods to collect qualitative and quantitative data from both primary and secondary sources. Quantitative data were captured from the Collier County Brief Community Assessment Survey (BCAS), which was available online and in-print in English, Spanish and Haitian Creole. Qualitative data were obtained from focus groups facilitated by Q-Q Research Consultants (QQRC) team members and focus groups facilitated by trained community volunteers. Additionally, a series of documents containing secondary data were analyzed to leverage existing information.



Collier County Snapshot

Background

Collier County, located on Southwest Florida's gulf coast, is Florida's 18th most populous county out of 67 counties. Collier County is the second largest county by size at 2,035 square miles, second only to Palm Beach County. The 2022 population estimate for Collier County from the U.S. Census Bureau is 397,994, a 6.7% increase from 2017.¹ Additionally, it is estimated that Collier County adds nearly 100,000 to the population throughout the county's "peak season" from December to April.

Population Data

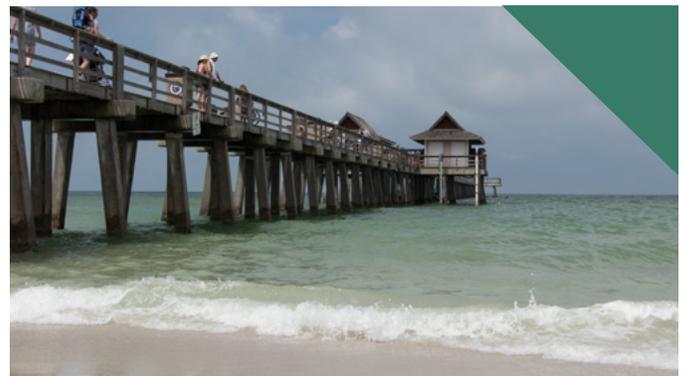
The median age in Collier County is 51.5, compared to the Florida state median age of 42.3.² Collier County is a relatively older county, with over 33% of the county's population being over the age of 65, compared to 22% for Florida state.³ In the 2017-2018 CCCA, Collier County was reported as the 9th-ranked county in Florida for the highest number of residents 65 and over. As of 2023, Collier County is now ranked 7th in Florida for the highest number of residents 65 and over.⁴

As of 2022, Collier County's population was 397,994. The population is projected to rise to over 450,000 by 2030, representing a 20% increase from 2017. Collier County had a notable decrease in households receiving food stamps/ SNAP (Supplemental Nutrition Assistance Program) benefits from 2018 to 2020, with 8% of households receiving these benefits in 2017 compared to 7% in 2020. Collier County had an increase in median household income from 2017 to 2022. Starting in 2017, the median household income was \$62,407, rising to \$80,815 in 2022. The poverty rate in Florida has decreased from 2017 to 2021, going from 14.0% to 13.1%, which is a similar decrease to the national poverty rates which fell from 13.4% in 2017 to 11.6% in 2021. Collier County's poverty rate has mirrored the average for Southwest Florida, decreasing from 12.8% in 2017 to 10.6% in 2021. When disaggregated by

age, those under 18 years old in Collier County experience the highest poverty rates.

Collier County, from 2017 to 2020, had high rates of educational attainment for those aged 25 and over, compared to the state of Florida. For adults aged 25 to 64, 35% had a bachelor's degree or higher in 2021. In 2021, 90% of Collier County residents had a high school diploma or higher, while 40% had a bachelor's degree or higher.⁵ The high school graduation rate for Southwest Florida has stayed relatively similar to the state from 2017 to 2021, with the Southwest Florida rate rising from 86.0% in 2017 to 87.9% in 2021 and the state rate rising from 86.1% in 2017 to 90.1% in 2021. Collier County saw an increase in high school graduation rates from 2017 to 2022, with 88.0% of students graduating in 2017 compared to 91.5% graduating in 2022.⁶

On average, Collier County has a larger White population than the state of Florida, with 77% of Collier County's population identifying as White compared to 68% for the state of Florida as of 2021. Collier County also has a higher number of Hispanic residents (29%) compared to the state (26%) as of 2021.⁷ As of 2021, Collier County has a lower number of Black residents (7%) compared to the state (16%). Finally, according to the Economic Wealth Index, Collier County is the wealthiest county in Southwest Florida, far outpacing the other counties in the area. Collier County is the second wealthiest county in the state of Florida, topped only by Monroe County.⁸ Collier County's gross regional product increased by 3% from 2015 to 2020 and is projected to increase by another 4% by 2025.⁹



Community Identified Priorities

The BCAS asked respondents to select from a list of the three areas that community leaders should prioritize moving forward. By a wide margin, the areas that community members most prioritized were 1) controlling housing costs and 2) managing growth and development. The third most prioritized area was the environment, including preservation, emergency resilience, and planning. Just under a third of BCAS respondents prioritized bringing better-paying jobs to the area.

Community identified priorities had much in common with findings from the 2017-2018 CCCA, although with some noteworthy changes, which are described in detail within the full report. The table below offers a brief comparison of the priorities between 2017-2018 and 2022-2023.

TABLE 1: COMMUNITY PRIORITIES AS COMPARED TO THE 2017-18 SURVEY

Priority	2022-2023	2017-2018
Controlling housing costs	65%	45%
Managing growth and development	63%	38%
The environment (preservation, emergency resilience, planning)	41%	22%
Bringing better paying jobs to the area	32%	39%
Public education and workforce training	24%	22%
Mental health services	23%	No data
Access to health and dental care (including primary care, specialty services, etc.)	22%	No data
Childcare for young children and summer/ after-school programs for youth	19%	No data

Findings by Domain

Economic Opportunity & Employment

BCAS responses were largely positive regarding access to employment opportunities, with about 70% agreeing or strongly agreeing that they had access to these opportunities in their community. Meanwhile, growth management (government policies that aim to accommodate, not prevent, growth within a particular location) was one of the areas where BCAS respondents expressed the most dissatisfaction. Satisfaction with workforce training was relatively mixed, although more agreed than disagreed that they were satisfied with this area. The BCAS also found that 22% of residents either disagreed or strongly disagreed that there was access to food in their neighborhood.

Focus group participants highlighted challenges for small businesses, which participants said are prominent throughout their communities. Navigating government policies and cost difficulties were specifically cited as barriers to starting a small business. In expert focus groups, participants mentioned long or far commutes to their jobs and lack of childcare options as barriers to economic opportunities and employment. Cost of living and inflation were frequently mentioned by focus group participants as challenges to economic growth and security in their communities. Needing to invest more in workforce development was specifically mentioned by community focus group participants, including job opportunities for young people, technical and vocational skills programs, and restaurant workers.



Education

PreK-12 education was an area where satisfaction was relatively strong in the community. However, more respondents disagreed than agreed that there was access to affordable childcare. Twenty-four percent (24%) of BCAS respondents selected public education and workforce training as a key priority, while 19% indicated that they prioritized childcare for young children and summer/after-school programs for youth. When considering only those survey respondents who reported having a child under 18 living in their household, the topics of education, childcare, and academic enrichment received greater priority.

Focus group participants mentioned needing childcare to maintain their jobs, but that demand for such care was high, and availability was low in their communities. Participants, notably education experts, reiterated the importance of after-school programming for all grade levels because it provides a safe space for these students to interact, socialize, and spend time. Participants, including education experts, described the need for increased vocational education and training in Collier County to fill employment gaps in trades. Participants, such as education experts, discussed

the effects of COVID-19 on students, highlighted the need for more English Language Learner (ELL) support, and expressed concern about politicizing education in both Collier County and the state of Florida. Education experts discussed the lack of teacher benefits, including lack of salary increases, as barriers to attracting teachers of better quality to the county.

Environment

The BCAS also explored attitudes about the environment and climate change readiness. It is worth noting that the survey was conducted just following Hurricane Ian, which caused widespread damage in Collier County. Despite this, attitudes were fairly mixed on a question addressing satisfaction with climate change readiness, although leaning toward dissatisfaction and uncertainty. When asked to select the top three priorities for leaders in Collier County, 41% of survey respondents selected the environment (preservation, emergency resilience, and planning), making this the third most prioritized issue. Satisfaction with emergency preparedness was relatively strong. The community survey also asked about access to parks and clean beaches, where satisfaction was overall favorable.

Focus group participants mentioned wanting more opportunities, especially for seasonal residents, to learn more about environmental education and awareness. In contrast to the BCAS findings, participants spoke about challenges with emergency and disaster management, preparedness, and response in Collier County. Some participants, including environment experts, emphasized the need to have conversations about resiliency to overcome future natural disasters, and that environmental disasters disproportionately impact vulnerable populations. Challenges with post-disaster restoration were also mentioned by focus group participants, including that residents are experiencing challenges with contractor availability to complete repairs caused by disasters. When asked about major environmental challenges facing their communities, participants cited the following concerns: water quality, the challenge of Harmful Algae Blooms (HAB), the increased duration and frequency of red tide and its impacts on human health and the economy, availability of quality freshwater supplies, and erosion.

Health Care & Mental Health Services

Although BCAS responses were mixed, more respondents expressed disagreement that residents in their neighborhood have access to affordable health care. The BCAS also asked respondents whether they felt that residents in their neighborhood had access to affordable mental health care. Nearly half of respondents disagreed that such services were accessible (20% strongly disagree, 27% disagree). Responses on the BCAS also leaned negative regarding access to affordable dental care. When asked what three areas should be priorities for leaders in Collier County, just 22% selected access to health and dental care (including primary care, specialty services, etc.). Similarly, 23% chose mental health services. However, lower-income respondents were much more likely to prioritize access to health care services.

Focus group participants mentioned various barriers they experience to accessing health care and mental health services, including doctor's office operating hours, ambulances, insurance coverage, closing or understaffed pharmacies in the community, and technology. Participants also discussed accessibility challenges with the locations of these services. Participants also mentioned challenges with provider availability across the county. Participants discussed their perception that health care was not affordable in their community. Participants mentioned specific health challenges faced by the senior population in the county, including a lack of affordable retirement and nursing home options and limited mental health care services. Participants spoke about many mental health care challenges they face in the community, including that adults, especially parents, and youth, need greater access to mental health services. Participants, notably mental health experts, also mentioned challenges with stigma and attitudes toward mental health or receiving mental health care. Regarding substance use and abuse, participants, notably health care experts, spoke about needing more comprehensive substance abuse education and awareness programs in the county.



Housing

Access to affordable housing emerged as a major concern in the BCAS. When asked whether they agreed that residents in their neighborhood had access to affordable housing, more than three-quarters either disagreed or strongly disagreed. In addition, when asked what should be priorities for community leaders moving forward, 65% of respondents selected controlling housing costs, making this the most selected option. Satisfaction with homelessness supports was fairly mixed on the community survey, leaning toward dissatisfaction.

Focus group participants discussed how people who could once afford to buy homes in the county could not today, reiterating that cost is a significant barrier to homeownership. Rising rent costs in the community were also discussed extensively by participants, especially the impact of rising rent costs on working people and young people. Participants discussed the issues of homelessness and homelessness intervention within the community. Participants, including experts, mentioned issues pertaining to workforce housing, such as the role of short-term rental properties, seasonal homes, and gentrification displacing residents. Participants also explained that unaffordable housing is driving out the workforce from the community. Participants also mentioned various issues related to HOAs, neighborhood code violations, and ordinances.

Infrastructure and Transportation

The BCAS asked about satisfaction with adequate public transportation. Around a fifth of respondents said they were unsure about satisfaction with public transportation, and the remaining responses were fairly mixed. A strong majority of BCAS respondents were satisfied with the public utilities in their community. Most BCAS respondents also agreed that residents in their area had access to a safe neighborhood and that residents in their community had access to affordable arts and cultural activities.



Photo courtesy of Habitat for Humanity of Collier County.

Participants expressed concern with the population increasing in the county, particularly that there is not enough space in the community to accommodate the population growth that comes with bringing in new employees. Participants expressed hopes to enhance roads, highways, and interstates to minimize traffic congestion and prevent car accidents. Participants did reflect positively on the recreational facilities they already have access to in the community, such as parks, athletic fields and courts, and golf courses. Participants also mentioned needing improved and increased pedestrian infrastructure across the county. Regarding transportation, participants, notably experts, described a lack of bicycle infrastructure and the problems that result from that, including the safety of bikers and resulting traffic congestion. Participants, including experts, also spoke about challenges caused by traffic volume in the county. Expert participants also mentioned various challenges with public transportation in the community, including how bussing as a form of public transportation is not a sustainable option.

Special Populations

The Special Populations domain explores the perspectives of two populations that were not specifically explored in the 2017-2018 CCCA. These include veterans, and residents who either represent or closely interact with individuals with disabilities. The BCAS asked respondents how satisfied they were with their community's services for disabilities. Attitudes were mixed and divided between expressing satisfaction and dissatisfaction with services for persons with disabilities. Just over half of BCAS said they were unsure about veterans' services in their community, and the remaining responses leaned toward expressing satisfaction.

Focus group participants identified the need for adult-focused special needs resources and programs, such as infrastructure developed throughout the community aimed at accessibility for adults with disabilities. Participants/experts in the Special Populations focus group expressed the need for a better connection to wraparound services and organizations to expand the capacity for the treatment of special needs and provide treatment. Participants also mentioned needing

to revise early intervention procedures to include more direct programs. Participants in the Veterans focus group also mentioned challenges facing the veterans in the county, including homelessness, inconsistent care at Veterans Affairs (VA) facilities and similar facilities at capacity, and the need for more community awareness about resources available to veterans, such as mental health or substance abuse resources.

Concluding Foundational Issue(s)

Foundational issues are the primary and essential conditions that significantly affect residents' quality of life. The foundational issues derived from this CCCA are represented in the priorities and needs of the residents within Collier County. As such, these issues have a direct and/or indirect effect on county residents' quality of life. The purpose of this section is to highlight the foundational issues identified through the CCCA, along with some potential recommendations to address them.



The cost of housing is the most cited issue by Collier County residents, and controlling housing costs is a key priority for them. The cost of housing within the county has been impacted by rising rents, particularly for the workforce population. Housing and insurance costs have also prevented homeownership. In addition, the prevalence of short-term rental properties in Collier County has decreased housing availability. To address these gaps, strategies can be taken to increase the economic security of Collier County's more vulnerable populations. Community and neighborhood-based services can be established to improve accessibility and address gaps. Generating greater community awareness of available resources through a comprehensive guide and/or database could also prove valuable. Social marketing can be employed to highlight county services and programs, including Collier 2-1-1 and Collier CARES. In addition, a partnership with Collier County's Community and Human Services Division is suggested, as the Division's operations are designed to address affordability and social services countywide.

Collier County residents also believe improvement is needed in managing county growth and development. They note that growth has outpaced infrastructure development and maintenance. Attention to traffic volume, flow, and congestion is a resident priority. Traffic issues are correlated to the number of area commuters and county public transit system limitations. Ongoing smart growth policies and practices can be explored and employed in Collier County. This includes the identification and implementation of community development and conservation strategies that advance the county socially, economically, environmentally, and equitably. Smart growth approaches should also encompass accessibility for persons with disabilities. Finally, future actions to manage growth and development should be advanced in alignment with existing entities and efforts outlined by the county's Growth Management Plan. Collier County's growth and development also impact the environment, and for county residents, managing growth and development includes consideration of the environment.

Access to health, dental, and mental health services were more highly rated as priorities by lower-income respondents, although they were not the most prioritized areas in the community survey overall. There was also substantial disagreement about access to these services in respondents' communities that indicates greater attention should be dedicated to expanding access to these services. This is a vital area that non-governmental entities in Collier County could prioritize to address community needs, notably for lower-income individuals.



Photo courtesy of the Guadalupe Center.

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