grow smarter
ST. PETERSBURG AREA CHAMBER OF COMMERCE

ST. PETERSBURG, FLORIDA
GROW SMARTER INITIATIVE
APPENDICES: COMPETITIVE ASSESSMENT

Submitted by Market Street Services Inc.
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May 8, 2014

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INTRODUCTION

This document contains appendices that further clarify data points included in the Competitive Assessment, Phase 1 of the Grow Smarter Initiative.

APPENDIX A: COMMUNITY SURVEY

Within the Competitive Assessment, public input, or qualitative analysis, gathered through a series of focus groups, interviews, and an online survey was incorporated to supplement quantitative analysis. The online survey was made available to all regional stakeholders, and 1,510 responses were collected. These responses are summarized in Appendix A.

APPENDIX B: METHODOLOGY

This appendix provides detailed information regarding the geographies featured in the Competitive Assessment as well as concepts described in the analysis. While city-level data was used where available, there are data points that relied on county- and ZIP code-level data.

APPENDIX C: DATA SOURCES

Appendix C describes the range of data sources *Market Street* leveraged for the Competitive Assessment. Federal, state, local, and proprietary data sources were utilized to provide the client with the most recent and reliable data available.
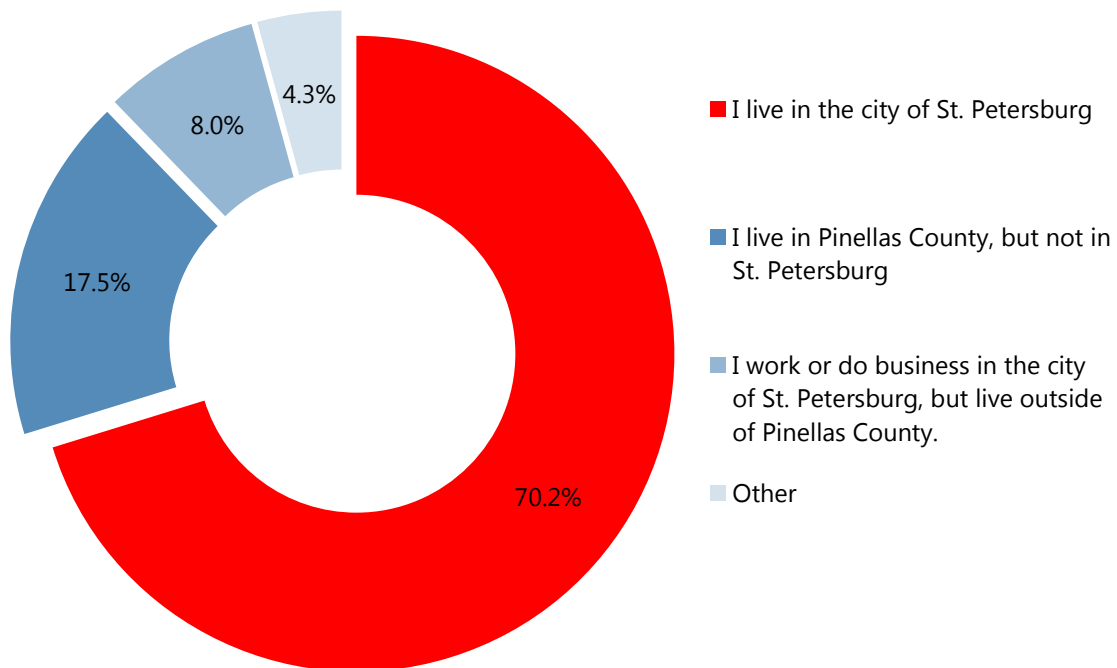
APPENDIX D: KEY TERMS

Appendix D is a glossary of key terms used throughout the Competitive Assessment. While brief explanations are provided within the report for context, this appendix provides further information about the nature of the indicator.
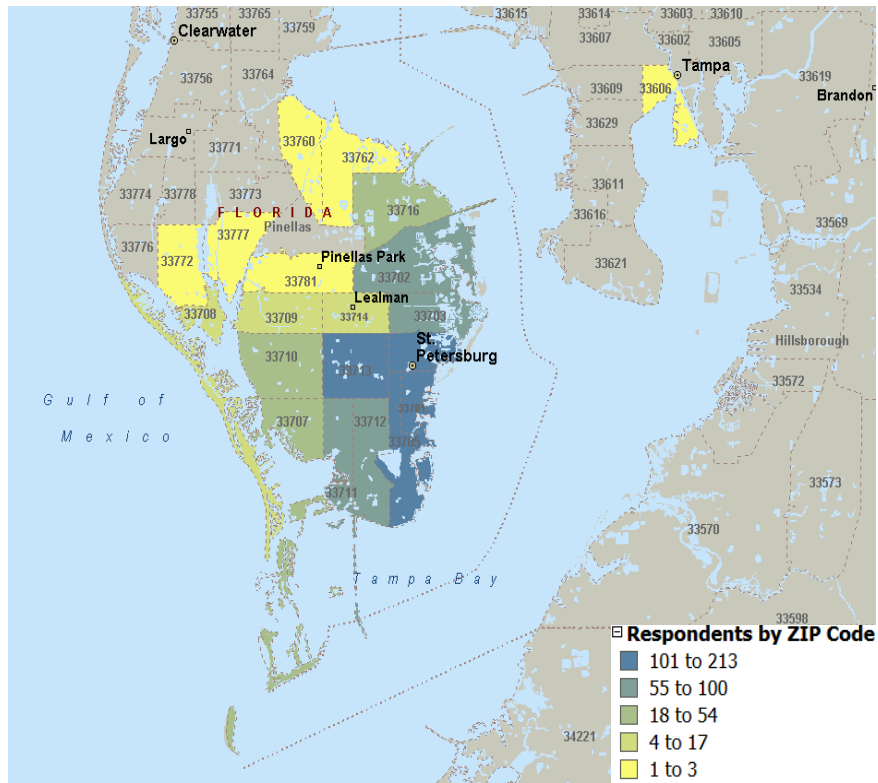
APPENDIX A: COMMUNITY SURVEY

The Grow Smarter Initiative community survey was available for responses from Wednesday, April 2 through Friday, April 25. A total of **1,510 respondents** participated in the survey, which was posted on the St. Petersburg Area Chamber of Commerce website. The survey was promoted through dissemination of a survey link to Chamber members and partners and multiple other distribution channels. For certain questions, "logic" was programmed into the survey to filter out respondents to those who can best speak to particular issues and questions.

While every effort was made to secure the participation of a representative sample of St. Petersburg Area residents and businesses in this survey, the actual response rates of certain constituencies and cohorts differ from their reported percentages in the community's total population and economic data. Therefore, a margin of error should be assumed for certain questions and response totals based on the characteristics of the respondents.

Q1: Please answer the following question:

- ■ I live in the city of St. Petersburg
- ■ I live in Pinellas County, but not in St. Petersburg
- ■ I work or do business in the city of St. Petersburg, but live outside of Pinellas County.
- ■ Other

Q2: What is the Zip Code of your St. Petersburg residence?
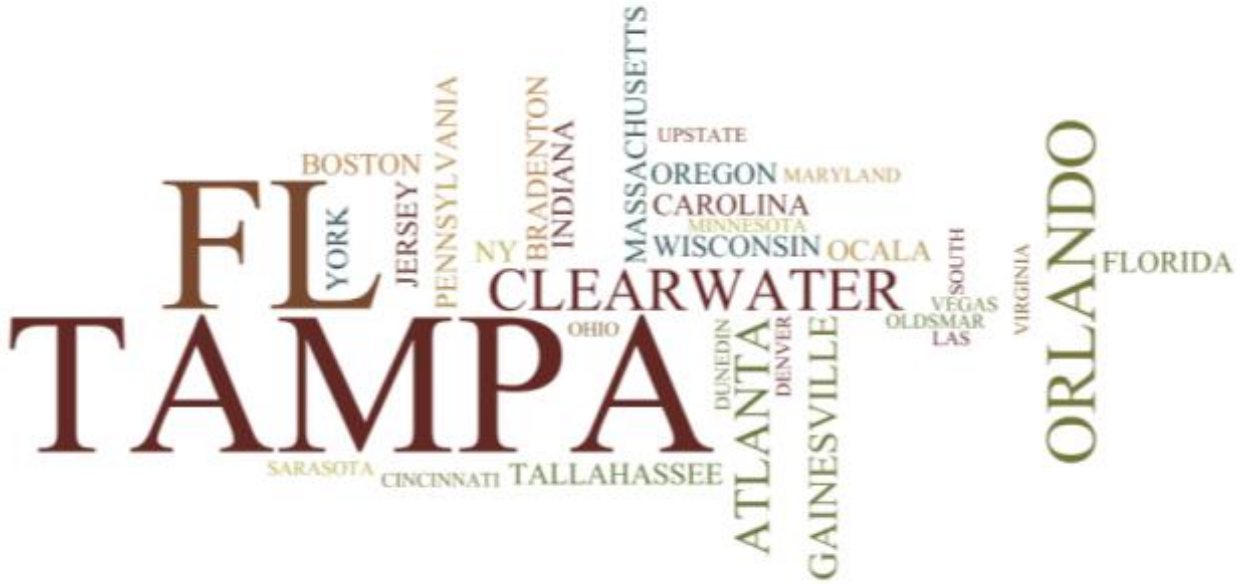

Q3: How long have you lived in St. Petersburg?
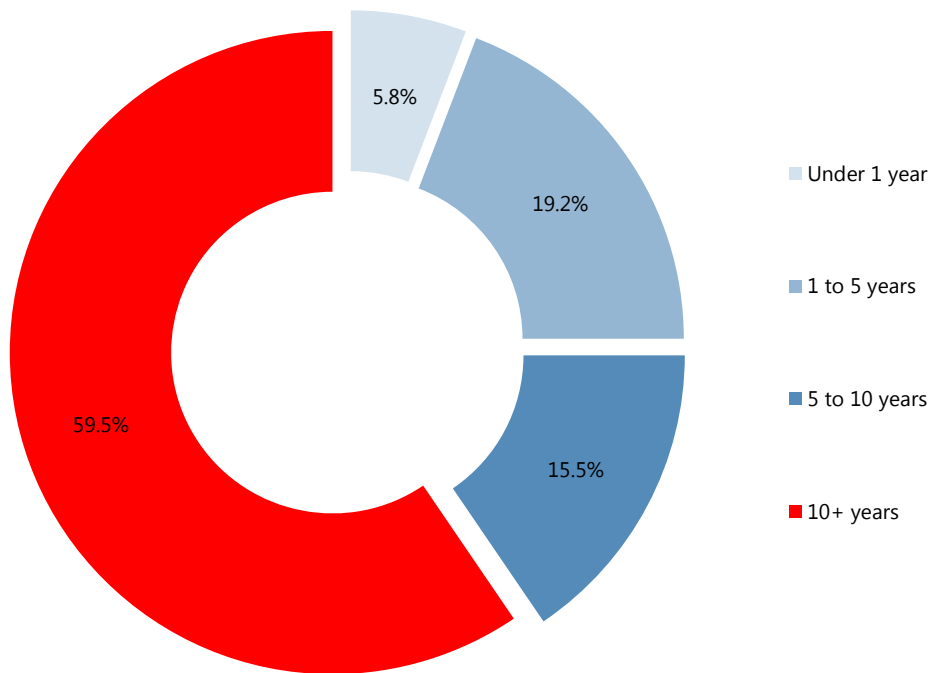
Q4: If you have been in the community less than 2 years, where did you move from?

The following word cloud determines the number of times survey a particular word was used by survey respondents. The larger the size, the more frequently the word was used.

Q5: Are you considering moving away from St. Petersburg?
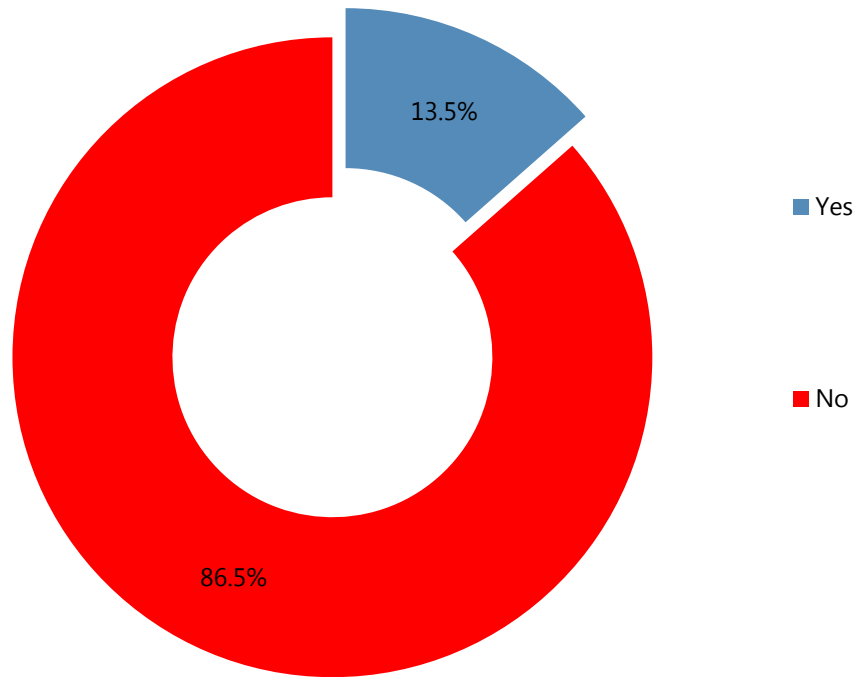
Q6: What is the Zip code of your Pinellas County Residence?

Pinellas County respondents only.

Q7: Do you work in the city of St. Petersburg?

Pinellas County respondents only.

Q8: Do you have a desire to move to St. Petersburg?

Pinellas County respondents only.
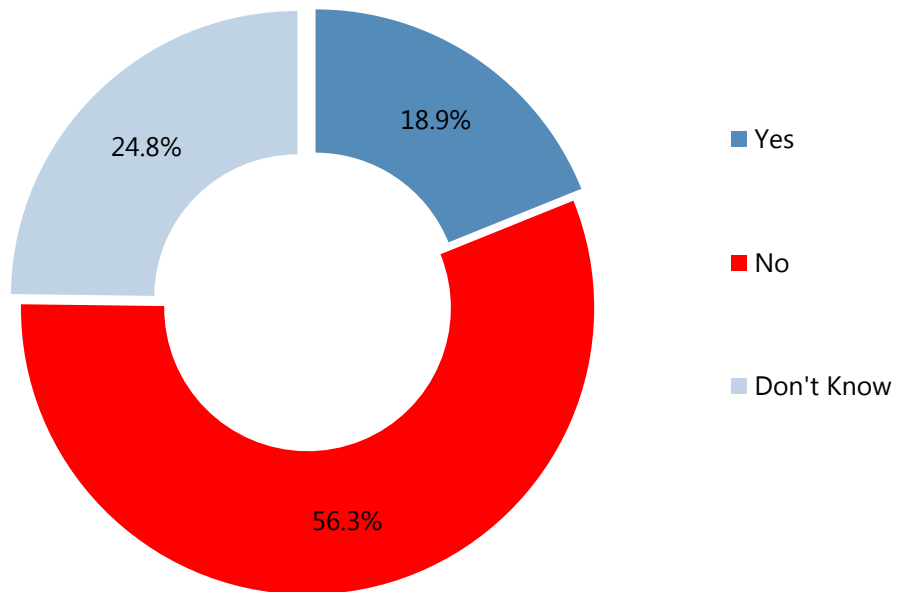
Q9: If you answered "yes," what is preventing you from moving to St. Petersburg?

Pinellas County respondents only. The following word cloud determines the number of times survey a particular word was used by survey respondents. The larger the size, the more frequently the word was used.

Q10: What is the zip code of the city in which you currently reside?

Q11: Do you have a desire to move to St. Petersburg?

- Yes — 37.4%
- No — 39.8%
- Don't Know — 22.8%
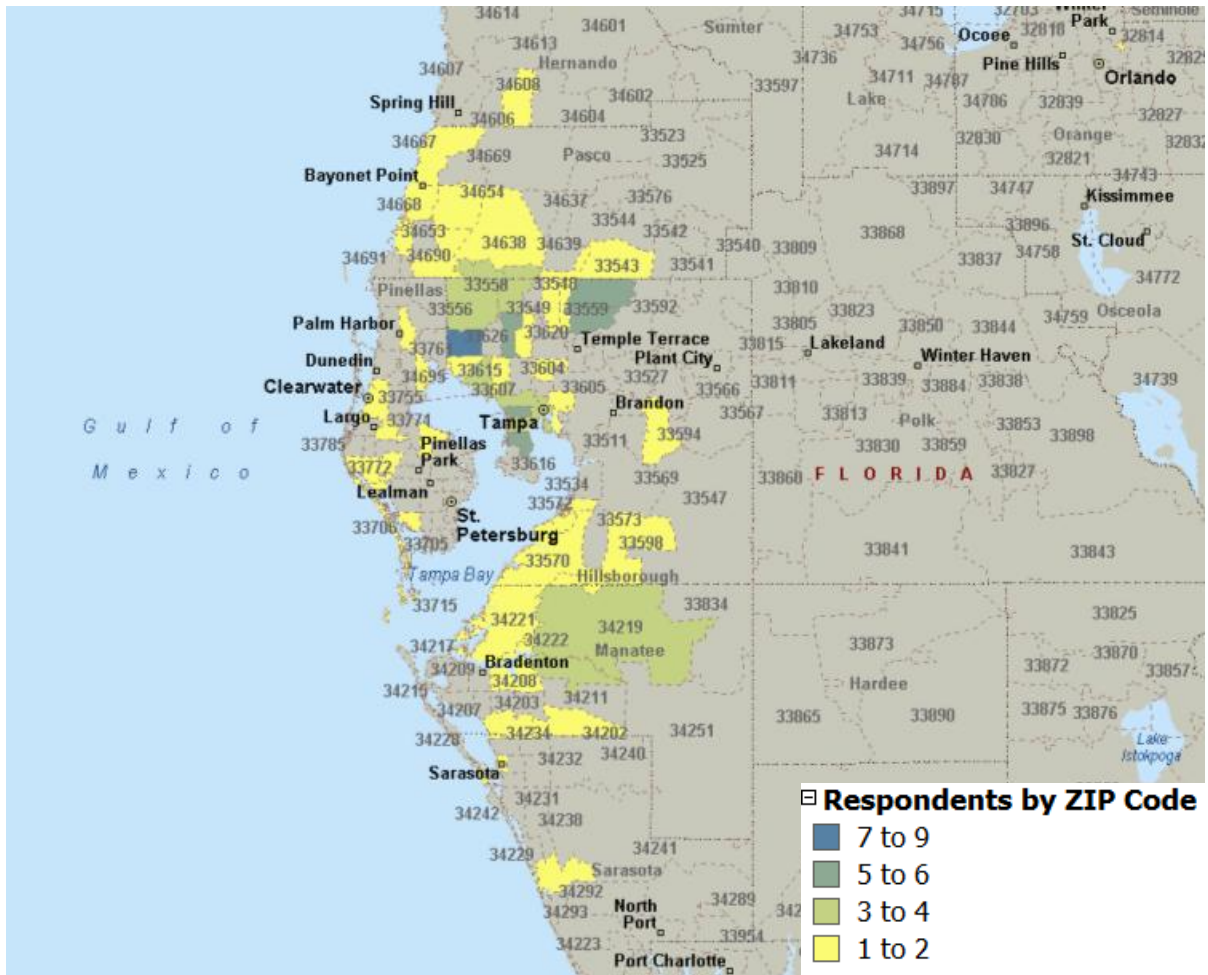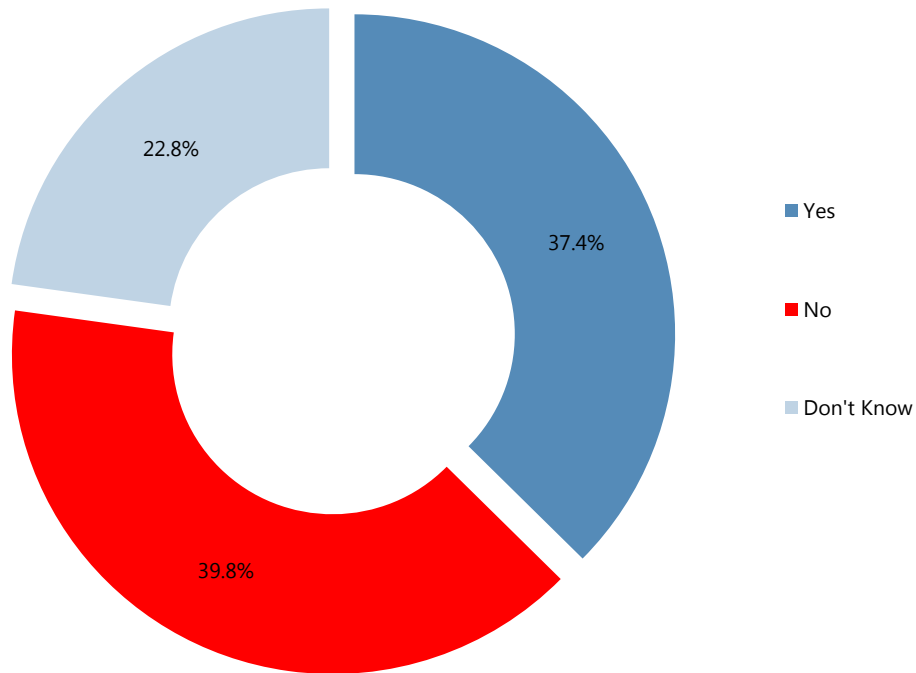
Q12: If you answered "yes," what is preventing you from moving to St. Petersburg?

The following word cloud determines the number of times survey a particular word was used by survey respondents. The larger the size, the more frequently the word was used.
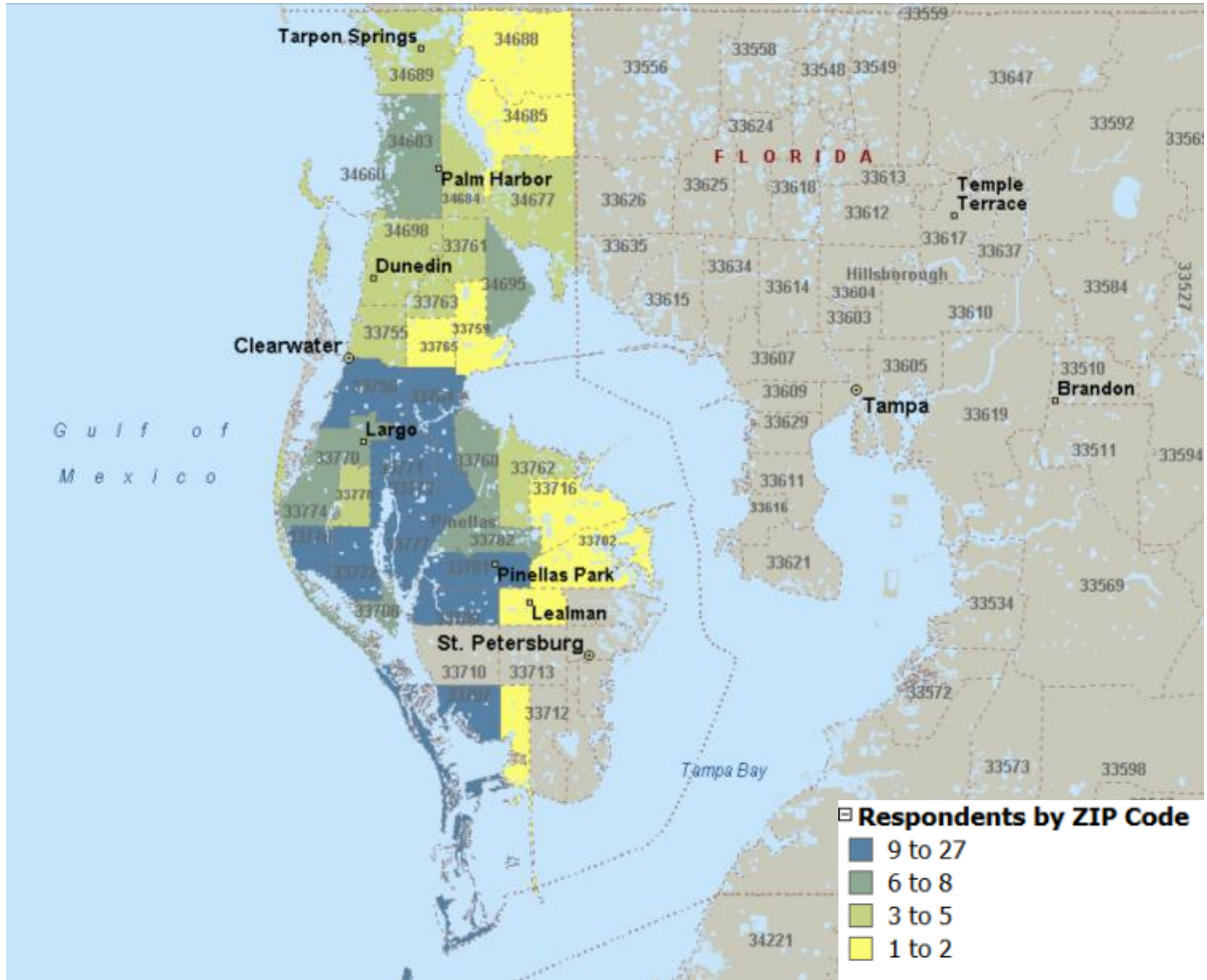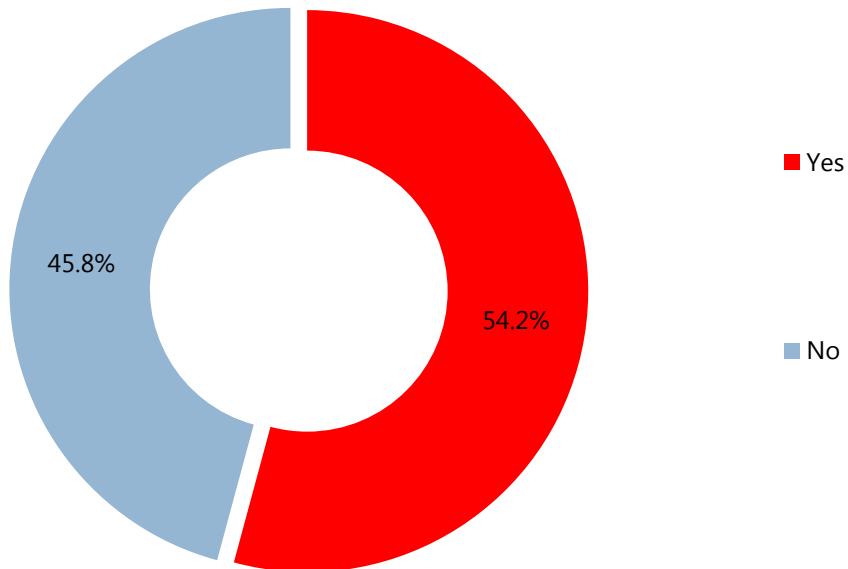
Q13: In your opinion, what is St. Petersburg's greatest strength?

The following word cloud determines the number of times survey a particular word was used by all survey respondents. The larger the size, the more frequently the word was used.
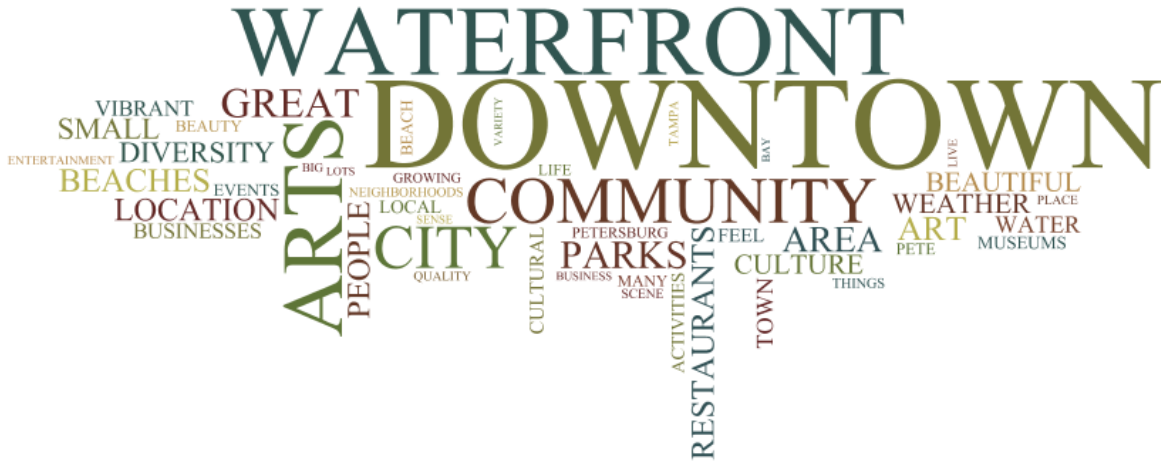
Q14: In your opinion, what is St. Petersburg's greatest threat or challenge to overcome?

The following word cloud determines the number of times survey a particular word was used by all survey respondents. The larger the size, the more frequently the word was used.
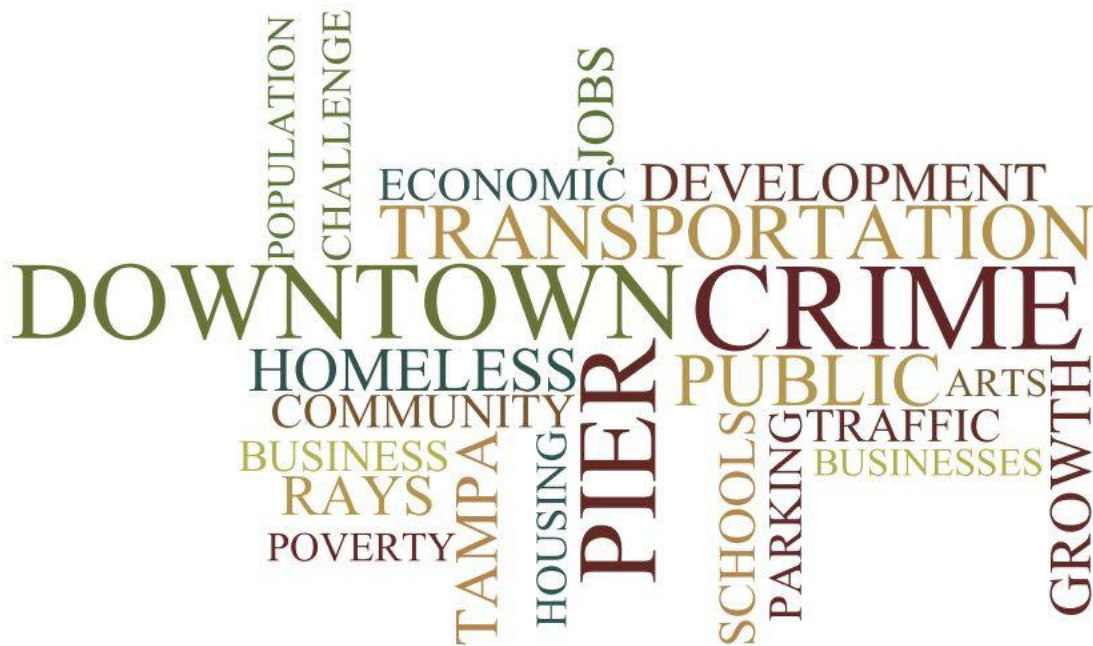
Q15: Name one thing you would do to most improve St. Petersburg:

Select responses only.

- *Light rail vehicles & enhanced public transportation including expanded ferry service*
- *Preserve all open space and keep them safe and clean*
- *Significantly increased financial support for the arts (like other cities)*
- *Provide additional services to youth who live in impoverished areas that provide them with more exposure to the opportunities outside of their environment so that they can understand that there are other avenues available to them to overcome generational poverty.*
- *Be more progressive and ahead of the curve (invest in the members of your community, put quality of life initiatives for all residents before tax breaks for organizations that don't invest in the city or its residents)*
- *Making the pier area a boardwalk like in other cities that take advantage of their waterfront such as Myrtle Beach area's Oceanfront Boardwalk and Promenade, Kemah Boardwalk, Kemah, TX even Coney Island.*
- *Finish the Pier with a progressive modern design, like the Dali. Make sure the 600 block art shops don't go away. Skate park by spa beach. Let's keep thinking progressive.*
- *Develop a team and a plan to bring us all together, instead of a special social group.*
- *Have open and honest dialog about race*
- *Provide more public transportation and encourage the use of bikes and your own two feet!*
- *Create a serious task force of adults, teens, counselors and educators & community folk specializing in vocation disciplines to help the community to become empowered to help themselves.*

Q16: What is your age?
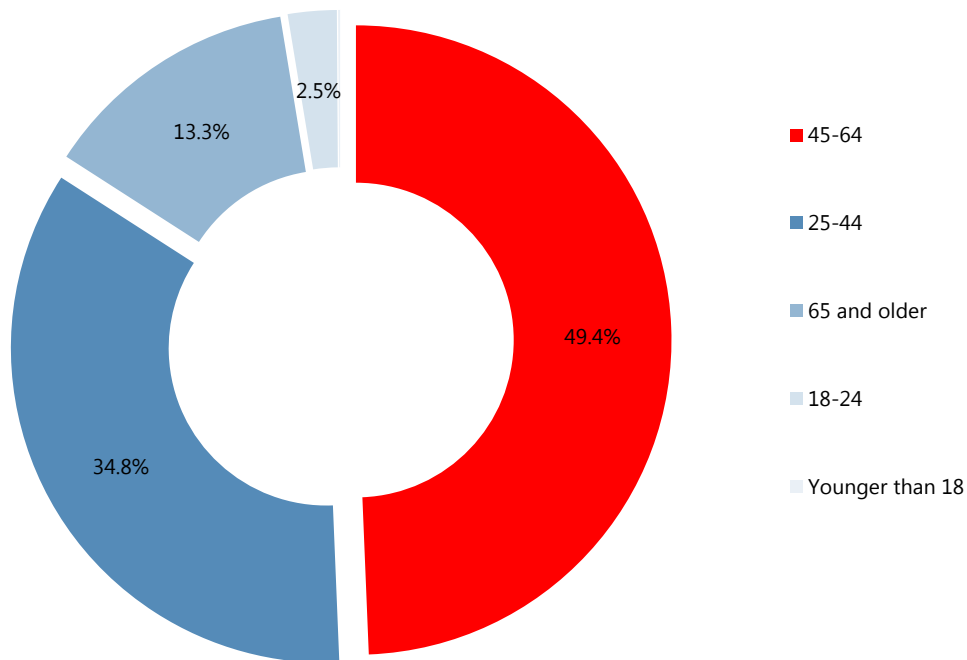
45-64: 49.4%
25-44: 34.8%
65 and older: 13.3%
18-24: 2.5%
Younger than 18

Q17: Please indicate if you disagree or agree with the following statement about young professionals (workers ages 25 – 39)
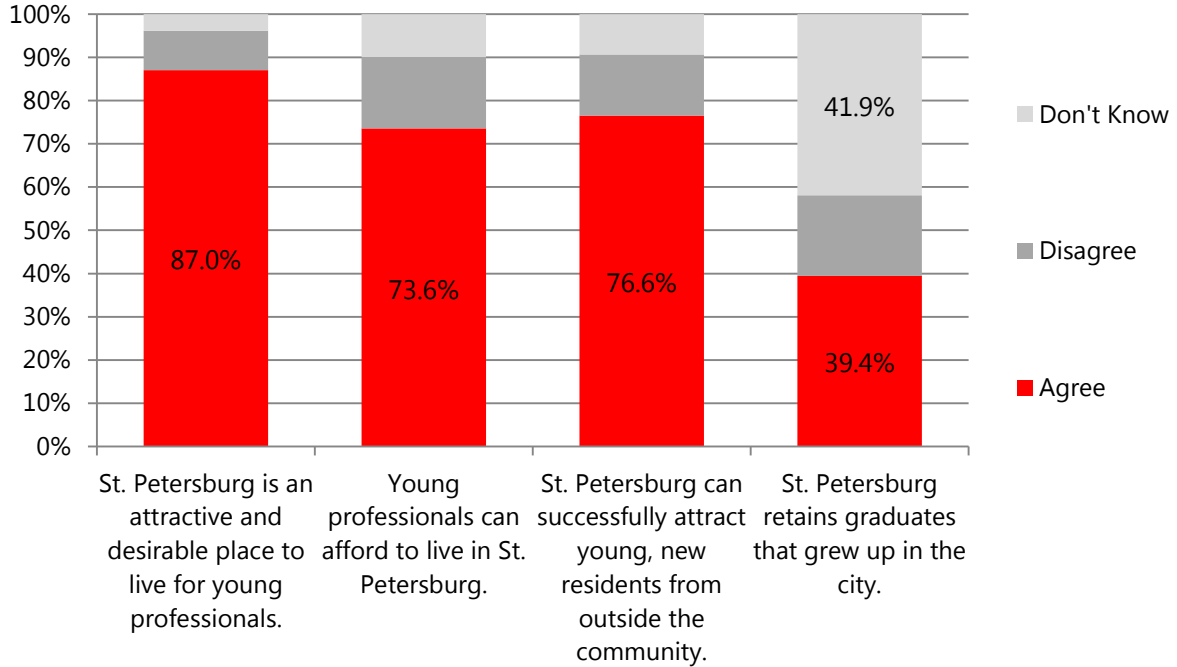
Q17: Please indicate if you disagree or agree with the following statement about young professionals (workers ages 25 – 39)

Responses include respondents who agree with the statement only. Results are cross tabulated by age, age 18-24 and 25-44 only.
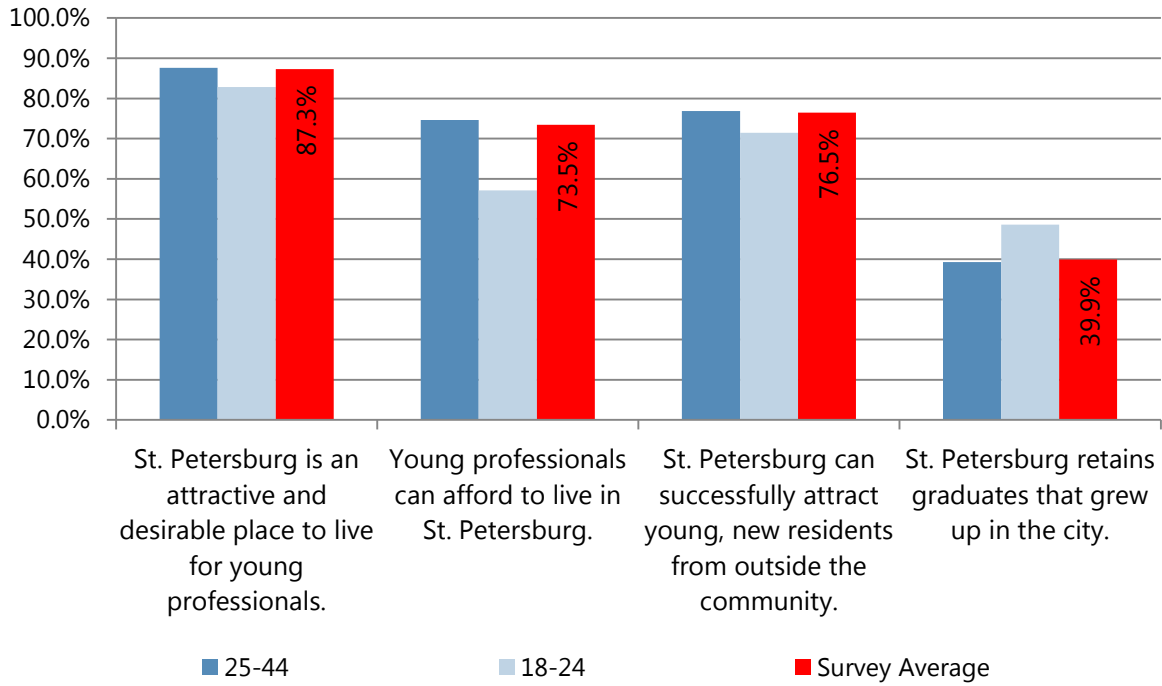
Q18: If you feel that it's a challenge, what needs to be done in St. Petersburg to more effectively retain and attract young professionals? (young professional respondents only)

Strategy	Number of Respondents
Affordable housing/apts	80
Need more jobs	61
Focus on public transportation	20
Keep growing entertainment/dining/shopping	15
Need higher quality/paying jobs	15
Cater to YP groups and tools	14
Keep growing downtown	12
Safety	11
Market St. Pete	11

Q19: What is your race/ethnicity?

- White, not Hispanic
- Black, not Hispanic
- Hispanic
- Asian or Asian-American
- Other
- Prefer not to answer
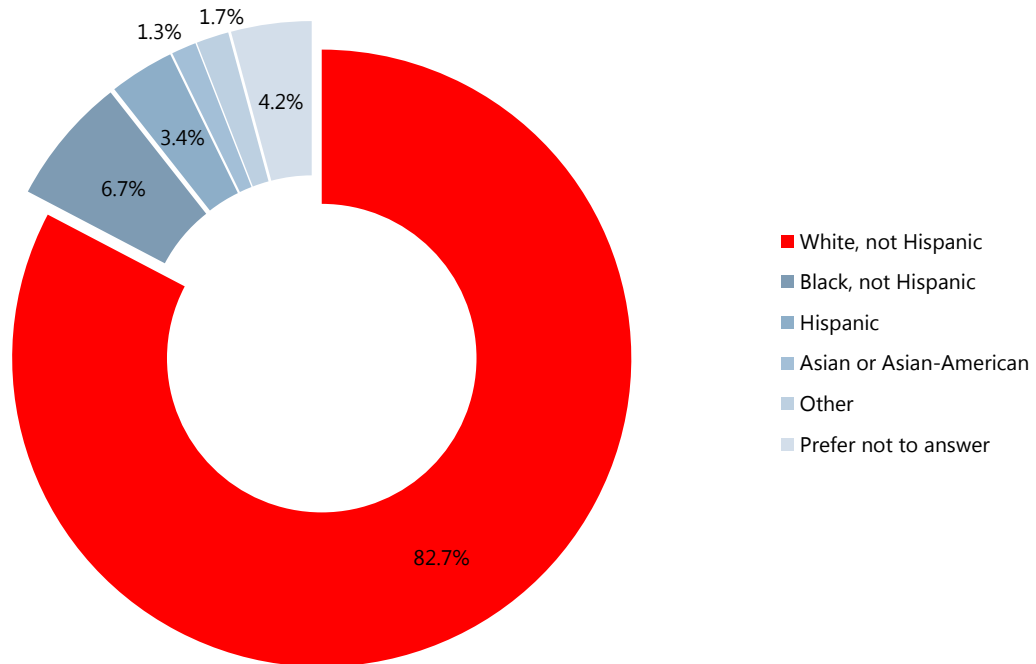
Q20: Does your household include children ages 18 or younger?
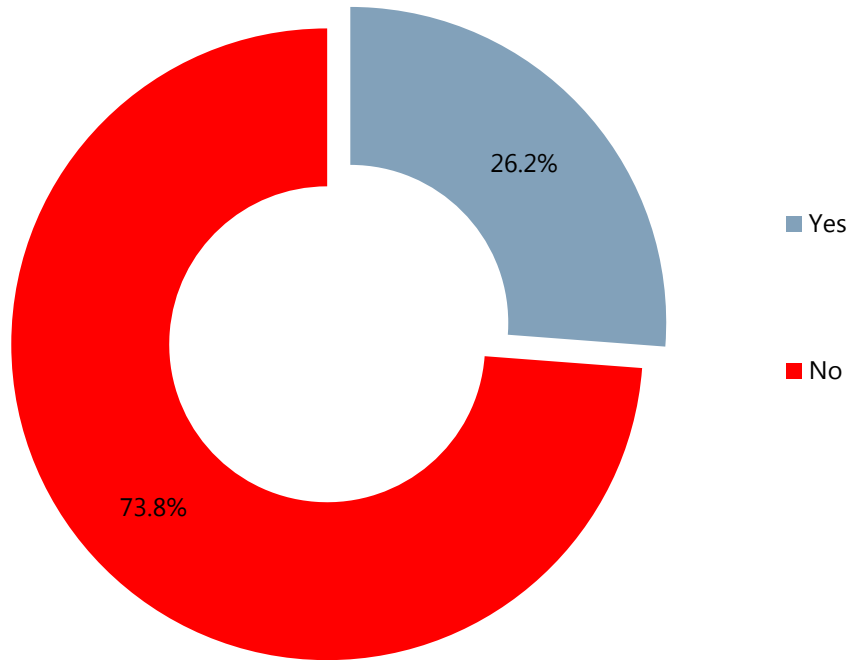
Q21: Which of the following best describes your current employment status?

Legend:
- Employed
- Retired
- Other (please specify)
- Student
- Unemployed
- Active duty military

1.4% 1.0%
8.7%
10.6%
78.1%
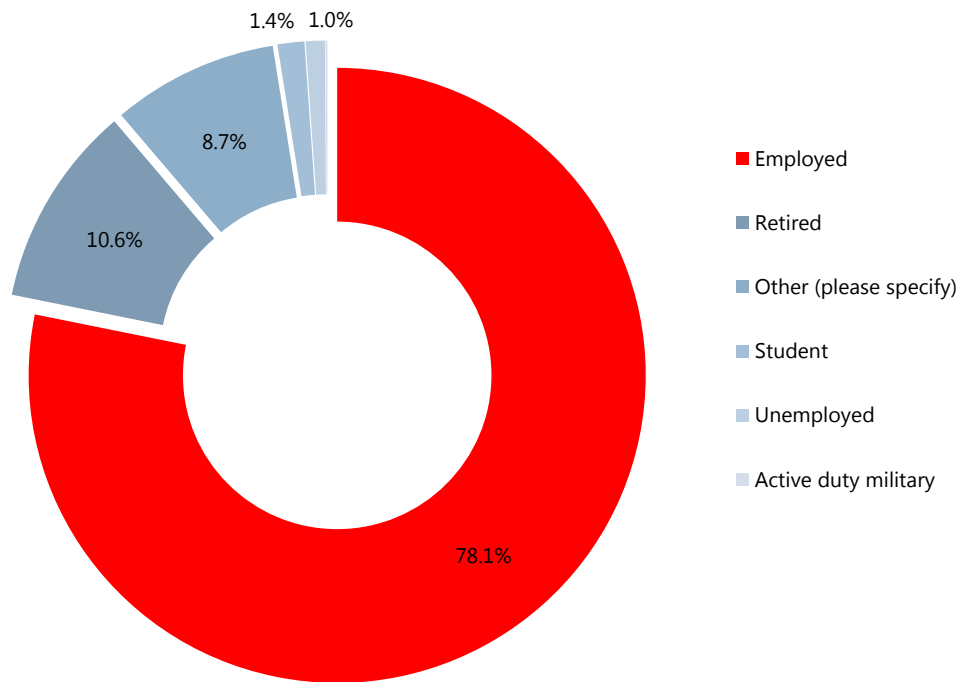
Q22: Which of the following best describes your role at your business or organization?

Legend:
- Employee
- Manager or director
- Entrepreneur/small business owner
- C-Level executive
- Vice president
- Other

6.2% 3.5%
10.4%
15.7%
28.6%
35.6%
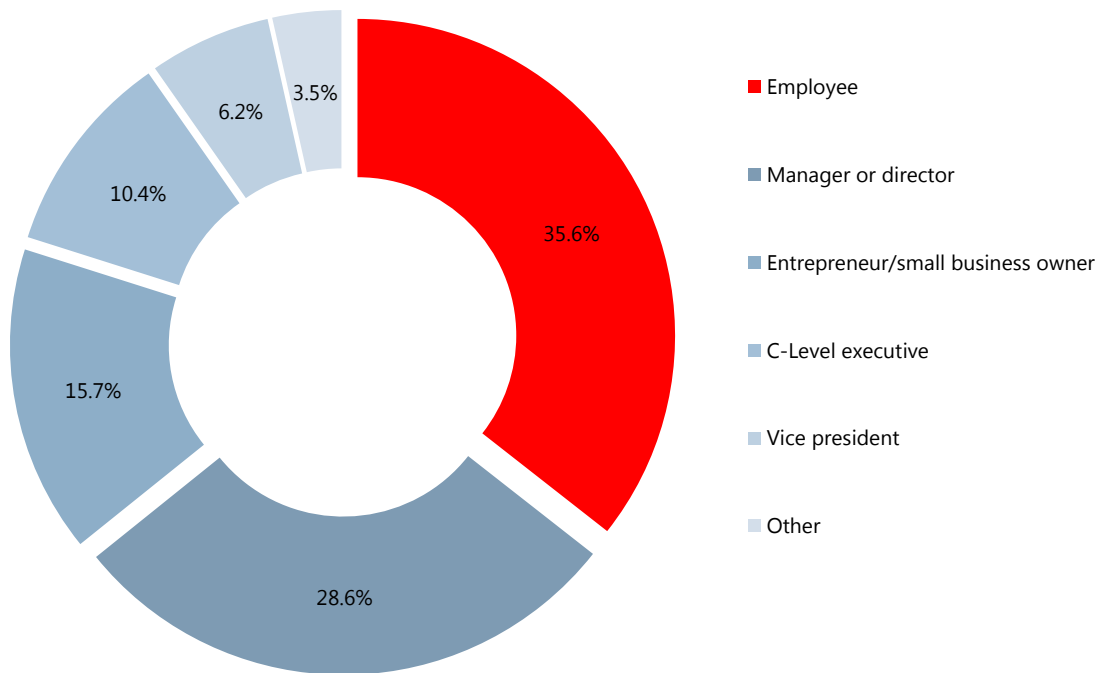
Q23: Please rate the following components of St. Petersburg's entrepreneurial climate:

The responses to the next two questions are from self-identified entrepreneurs and small-business people.

	Weak or Very Weak	Average	Strong or Very Strong
Availability of seed loans	58.8%	35.1%	
Availability of angel investment	59.6%	34.0%	
Availability of venture capital	55.4%	37.6%	
Acceleration programs	46.3%	38.9%	14.7%
Incubation facilities	49.5%	35.1%	15.3%
Mentorship opportunities	25.6%	45.0%	29.5%
Small business development support	26.0%	41.1%	32.9%
Entrepreneur-focused events and meetups	17.9%	39.7%	42.4%
Availability of talent	19.6%	37.9%	42.5%

Q24: What could be done to enhance St. Petersburg's entrepreneurial capacity or "ecosystem"?

Select responses only.

- *Provide benefits and incentives by streamlining startup process and working as a team and not an adversary.*
- *Increase minority participation and programs introducing the concept to youth*
- *I feel we are moving forward in this and at a good pace*
- *Advanced leadership focus*
- *Provide more training & courses through lifelong learning program at the University of South Florida, St. Petersburg*
- *A strong cooperation and link between business, education above high school, and a strong commitment to creating jobs for this and the next century.*
- *8th Grade Student Assessments to get children on the education path to best accommodate their natural strengths. Foster current idea development through team building and improved development of leadership. The current Chamber Leadership program needs to be adjusted to meet the needs of the community. Right now it is failing.*

Q25: In your opinion, what is the biggest challenge or challenges facing St. Petersburg's economy?
Responses for questions 25 to 30 are from self-identified decision-makers in their companies

Strategy	Number of Respondents
Lack of job diversity	27
City/County leadership	14
Need higher paying jobs	13
Help/support small businesses and start-ups	12
Housing market	9
Antiquated leadership/ideas	9
Fostering growth	6
Seasonal business/"snow bird" season	5
Lack of talent for jobs	5
Transportation	5

Q26: What, in your opinion, is the top action or actions St. Petersburg could imitate to improve its economy and drive job creation?

Strategy	Number of Respondents
Encourage business growth	21
Expand/improve education	15
Help/support small businesses	13
GreenLight/Transportation issues	12
Incentivize businesses	10
Fund the arts	10
Expand focus outside of downtown (Midtown/South Side)	7
Professionally market city	5
Target affordable living issues	5
Lower taxes/fees	5

Q27: Please evaluate the following aspects of St. Petersburg's business climate:
(1 = Significant Disadvantage, 5 = Significant Advantage)

Aspect	Value
Insurance costs	2.38
Availability of qualified employees	2.87
Cost of utilities	3.03
"Business-friendliness" of dev.-review process	3.19
Availability of industrial sites/buildings	3.21
Infrastructure to support growth	3.22
Environmental regulations	3.25
Affordability of Class A office space	3.29
Availability of Class A office space	3.30
Government (city/county) support for business	3.31
Local tax climate	3.49
Labor costs	3.59
State tax climate	3.93

Q28: Please rate the following statements according to the degree to which you agree.
(1 = Strongly Disagree, 5 = Strongly Agree)

Statement	Rating
I have no trouble finding quality employees for my business.	2.98
My business receives the support from government it needs to grow.	2.92
My business receives the support from economic development organizations it needs to grow.	3.03
My business will remain in St. Petersburg for the long-term.	3.99
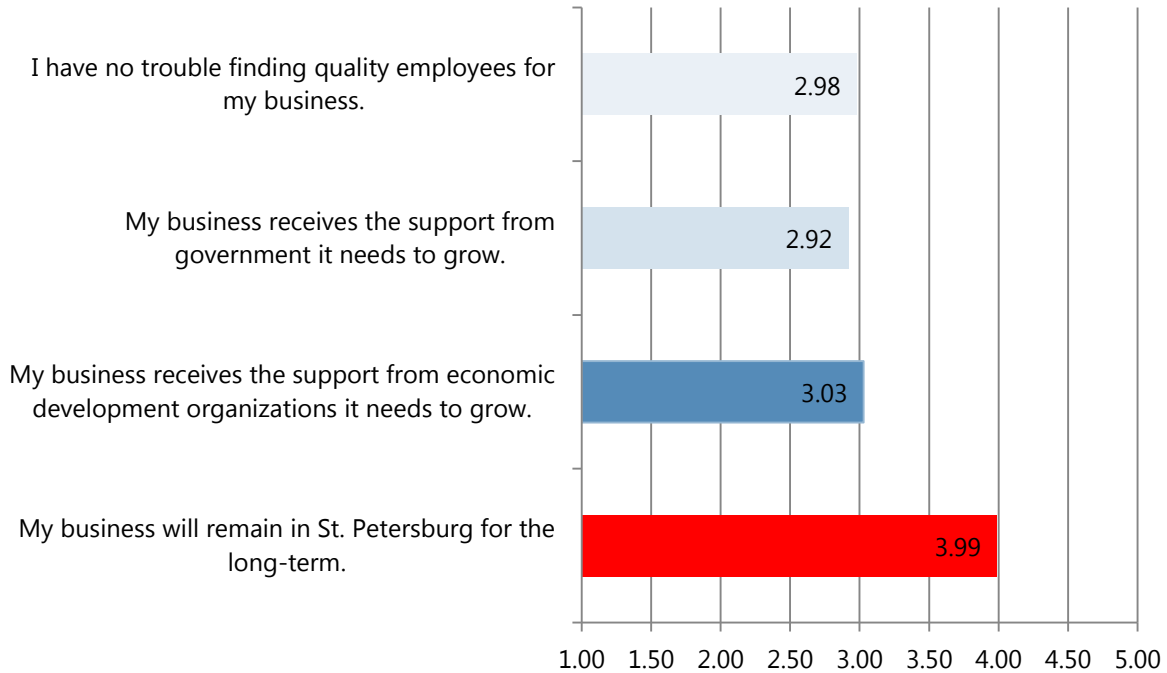
Q29: What do you feel the greatest strength of the local workforce?

Strategy	Number of Respondents
Diversity	57
Dedicated to the area	43
Amount of job seekers	41
Inexpensive	39
Experience/skills	38
Work ethic	38
Don't know	32
Educated/Can draw from USF, Eckerd, etc.	29

Q30: What do you think is the greatest weakness of the local workforce?

Strategy	Number of Respondents
Lack of skills/training	95
Their education (after HS)	92
Poor work ethic	56
Amount of jobs available in St. Pete	28
No opinion	25
Pay is too low to attract employees	23
Quality of available employees	23
Transportation issues	15

Q31: Please rate the following aspects of St. Petersburg's quality of life.
(1 = Poor, 5 = Excellent)

Aspect	Rating
Public transit capacity	2.16
Affordability of child care	2.88
Traffic congestion	2.98
Availability of child care	2.98
Affordability of healthcare	3.01
Housing affordability	3.05
Diversity of housing options	3.35
Competitiveness of cost of living	3.35
Availability of healthcare	3.52
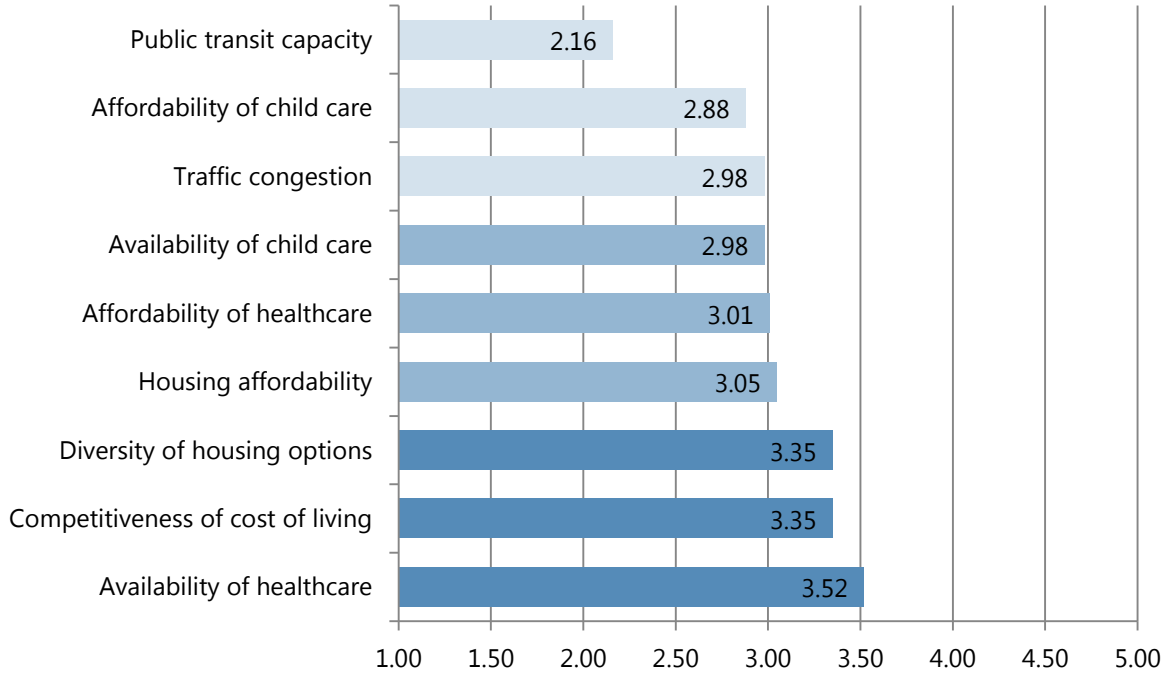
Q31: Please rate the following aspects of St. Petersburg's quality of life

Responses are cross tabulated by race and ethnicity. (5 = Excellent, 1 = Poor)

Public transit capacity — Average Rating: 2.15
Affordability of child care — Average Rating: 2.88
Availability of child care — Average Rating: 2.98
Traffic congestion — Average Rating: 2.98
Affordability of healthcare — Average Rating: 3.03
Housing affordability — Average Rating: 3.05
Diversity of housing options — Average Rating: 3.36
Competitiveness of cost of living — Average Rating: 3.36
Availability of healthcare — Average Rating: 3.52

Legend: ■ Non-White   ■ White, not Hispanic   ■ Average Rating

Q31: Please rate the following aspects of St. Petersburg's quality of life.

Reponses are cross tabulated by age, 18-24 and 25-44 age groups only. (5 = Excellent, 1 = Poor)

Chart legend: ■ 25-44   ■ 18-24   ■ Average Rating

Aspect	Average Rating
Public transit capacity	2.16
Affordability of child care	2.88
Availability of child care	2.98
Traffic congestion	2.99
Affordability of healthcare	3.01
Housing affordability	3.05
Diversity of housing options	3.35
Competitiveness of cost of living	3.35
Availability of healthcare	3.52

Q32: Please rate the following aspects of St. Petersburg's amenities and services as they relate to quality of life.

(1 = Poor, 5 = Excellent)

Aspect	Rating
Provision of social and human services	3.16
Sense of personal and property safety	3.2
Levels of civic engagement	3.44
Philanthropic and charitable capacity	3.78
Nightlife opportunities	3.93
Shopping and dining opportunities	3.97
Recreation amenities	4.13
Waterfront amenities	4.29
Cultural and arts facilities and programs	4.35

Q32: Please rate the following aspects of St. Petersburg's amenities and services as they relate to quality of life.

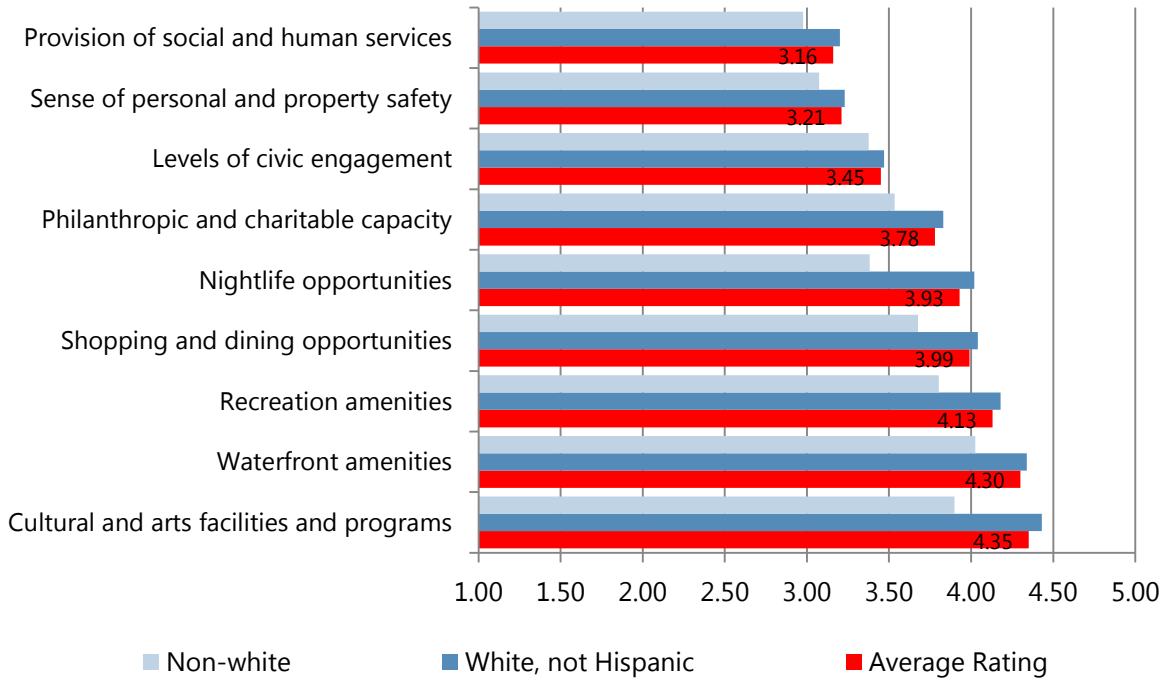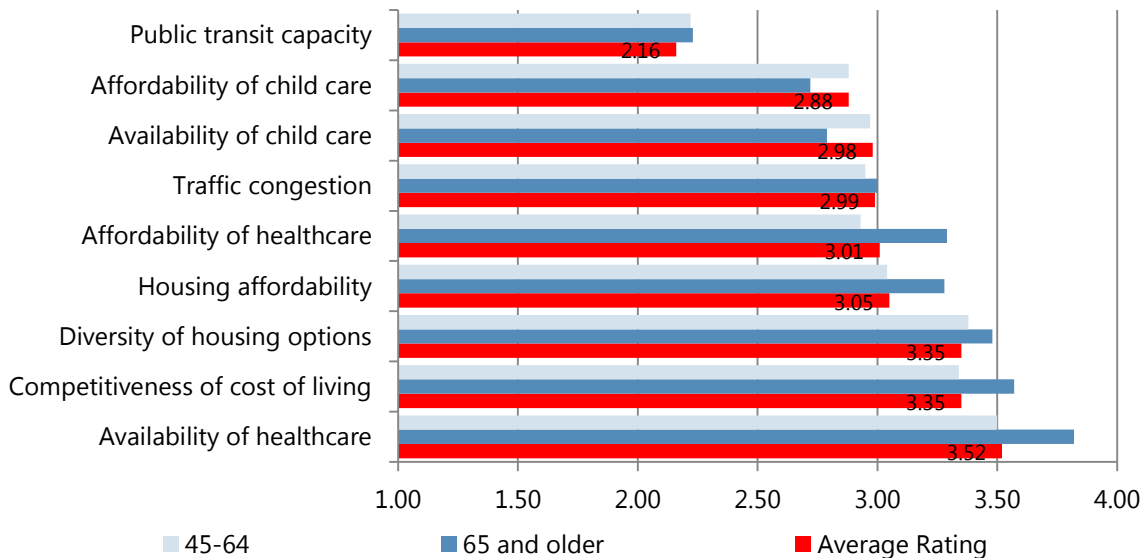*Reponses are cross tabulated by race and ethnicity. (1 = Poor, 5 = Excellent)*

Provision of social and human services — 3.16
Sense of personal and property safety — 3.21
Levels of civic engagement — 3.45
Philanthropic and charitable capacity — 3.78
Nightlife opportunities — 3.93
Shopping and dining opportunities — 3.99
Recreation amenities — 4.13
Waterfront amenities — 4.30
Cultural and arts facilities and programs — 4.35

Legend: Non-white | White, not Hispanic | Average Rating

Q32: Please rate the following aspects of St. Petersburg's quality of life.

Reponses are cross tabulated by age, 45-64 and 65 and older age groups only. (1 = Poor, 5 = Excellent)

Public transit capacity — 2.16
Affordability of child care — 2.88
Availability of child care — 2.98
Traffic congestion — 2.99
Affordability of healthcare — 3.01
Housing affordability — 3.05
Diversity of housing options — 3.35
Competitiveness of cost of living — 3.35
Availability of healthcare — 3.52

Legend: 45-64 | 65 and older | Average Rating

Q33: What do you think most differentiates St. Petersburg from the city of Tampa?

Select responses only.

- *Working in both cities, I see St. Pete is more laid back and relaxed, more casual*
- *A beautiful waterfront and lack of traffic congestion. Plus nicer residents.*
- *St. Petersburg is beautiful, clean and safe. All roads are easier to navigate and less crowded. Many neighborhoods are cohesive and engaged.*
- *Waterfront and lively, eclectic downtown + close access to beaches*
- *Better geography, not too big of a city, less stressful, better tourist destination, beaches, Tampa has a better night life, better restaurants, shops, sushi :) more common,*
- *The communal pride us residents have. It's a livable city, not a commuter city. The people are more genuine here.*
- *Tampa appears to have a larger population of affluent or elite citizens. More options available to work and play.*
- *Cleanliest, the way neighborhoods and industry are placed; our downtown area attracts the young and tourist. Pretty much anything you can think of that is good.*
- *St. Petersburg is LESS PROGRESSIVE than Tampa. There seems to be more upward mobility for minorities over there.*

Q34: Please rate the following statements on the community's diversity and openness.
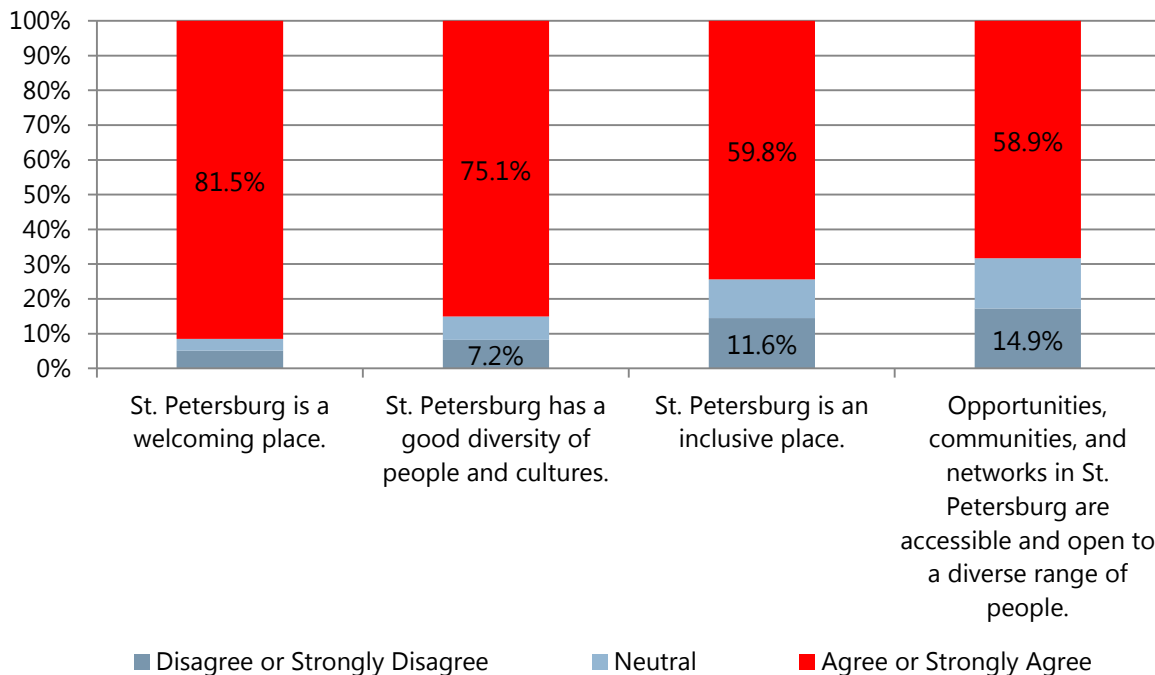
Q34: Please rate the following statements on the community's diversity and openness
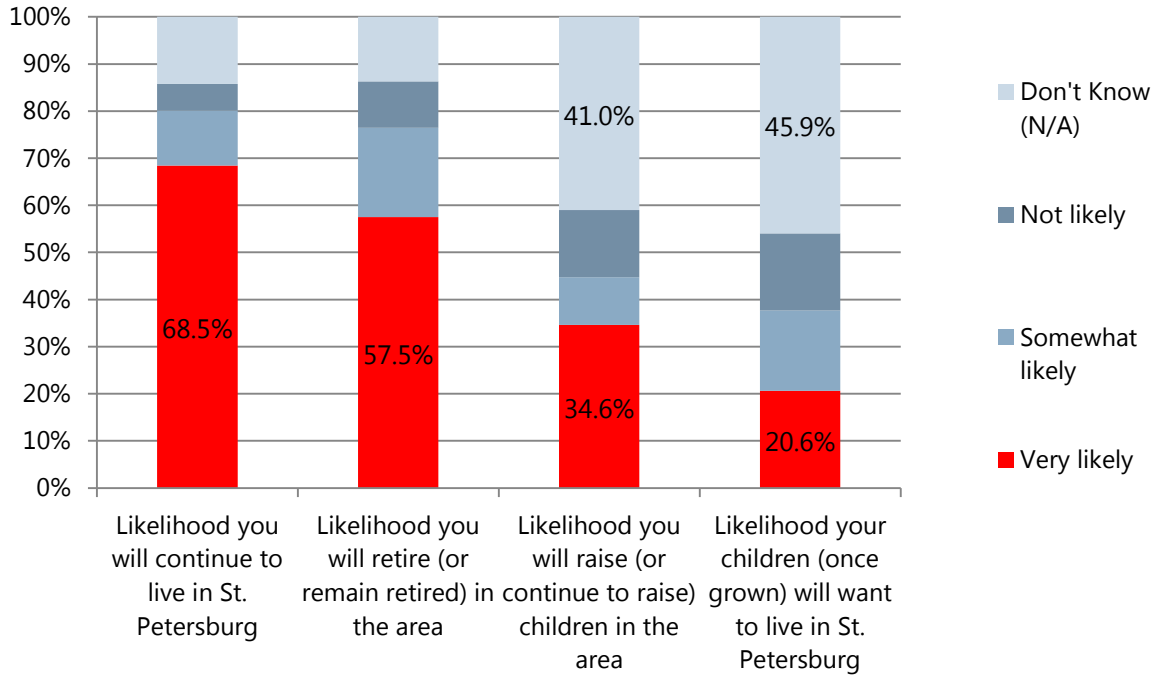
Responses are cross-tabulated by race and ethnicity (5 = Strongly Agree, 1 = Strongly Disagree)

| | Non-white | White, not Hispanic | Average Rating |
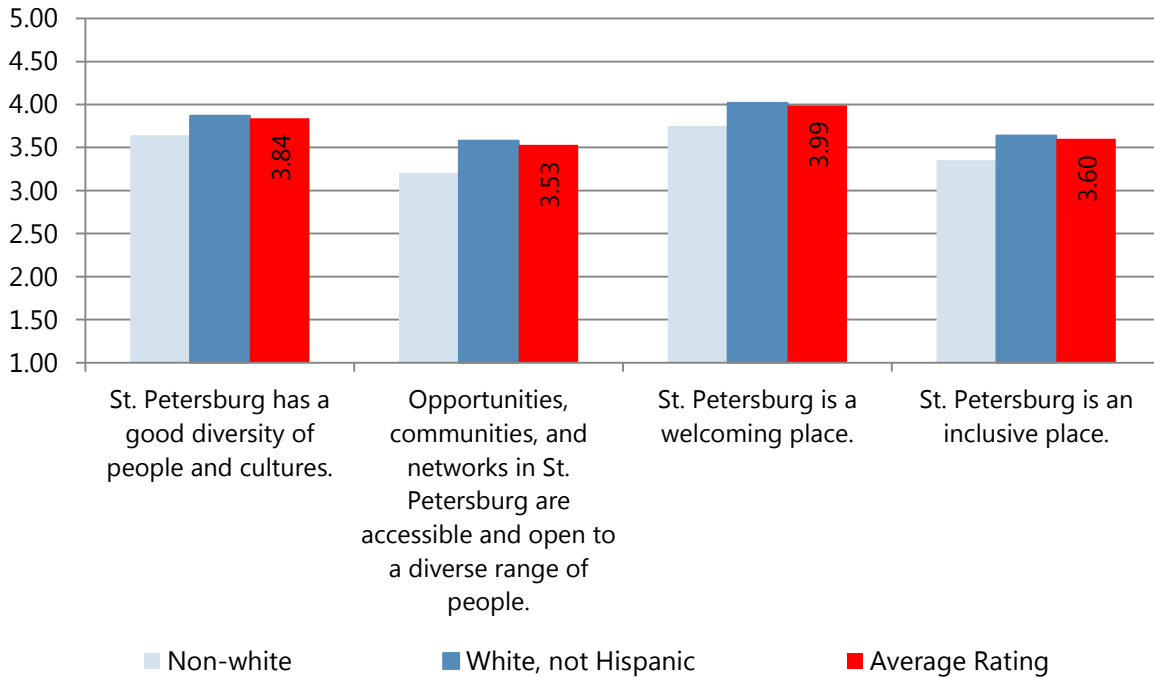
Q35: If you feel that it is not inclusive and/or welcoming, what could be done to make St. Petersburg a more inclusive and or welcoming community?

- *Invitations make anyone feel welcome.*
- *Work to integrate opportunity.*
- *More efforts to bring arts and jobs to South St. Pete.*
- *We have to work on the Central Ave invisible color line. Much of that has to deal with economics. Put limits Section 8, and put people on the tax roll.*
- *Tell and share more good news; amp up efforts to communicate key messages via billboards, radio talk shows, bench signage, bus signage, and more - creating a sense of momentum around the progress that too often goes unreported, and therefore underutilized as an asset in our growth.*
- *More access for minorities for upward mobility, progressiveness and economic development*
- *The 2020 plan is a good start*
- *Keep building on the inter-cultural exchanges that already exists. Keep celebrating our diverse communities more and more.*

Q36: Please rate the following statements.

Q36: Please Rate the Following Statements

Percent of respondents selecting somewhat likely or very likely only. Results are cross tabulated by race and ethnicity.

	Non-white	White, not Hispanic	Survey Average
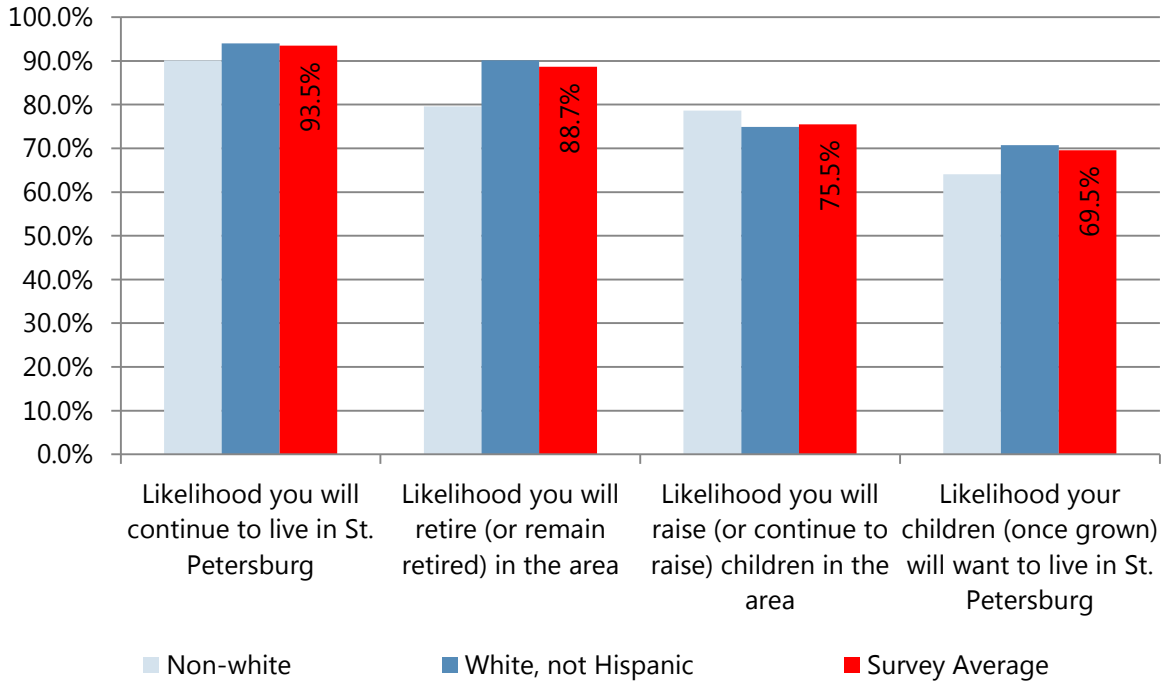
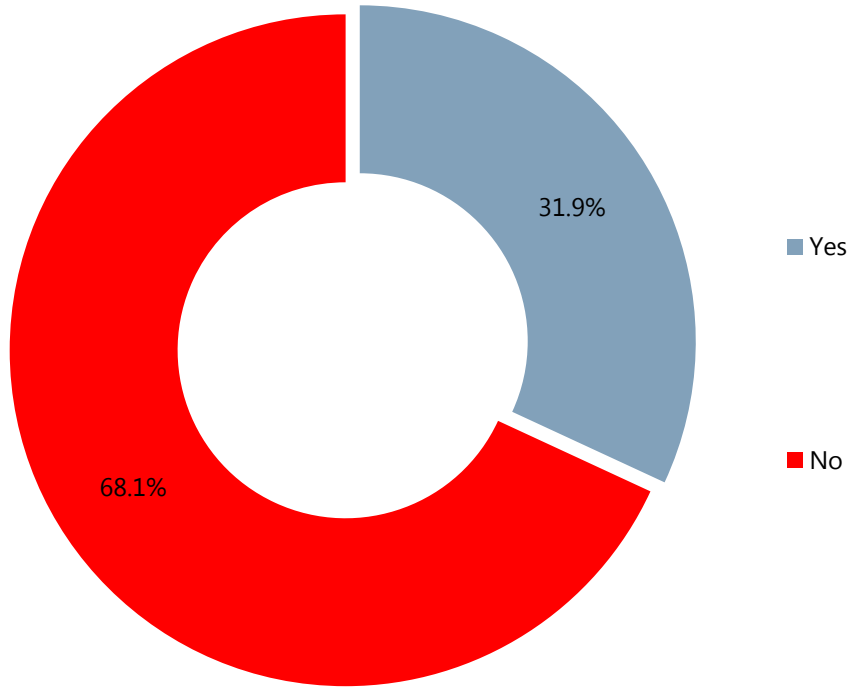**Q36: Please rate the following statements.**

Percent of respondents selecting somewhat likely or very likely only. Results are cross tabulated by age, age 18-24 and 25-44 only.
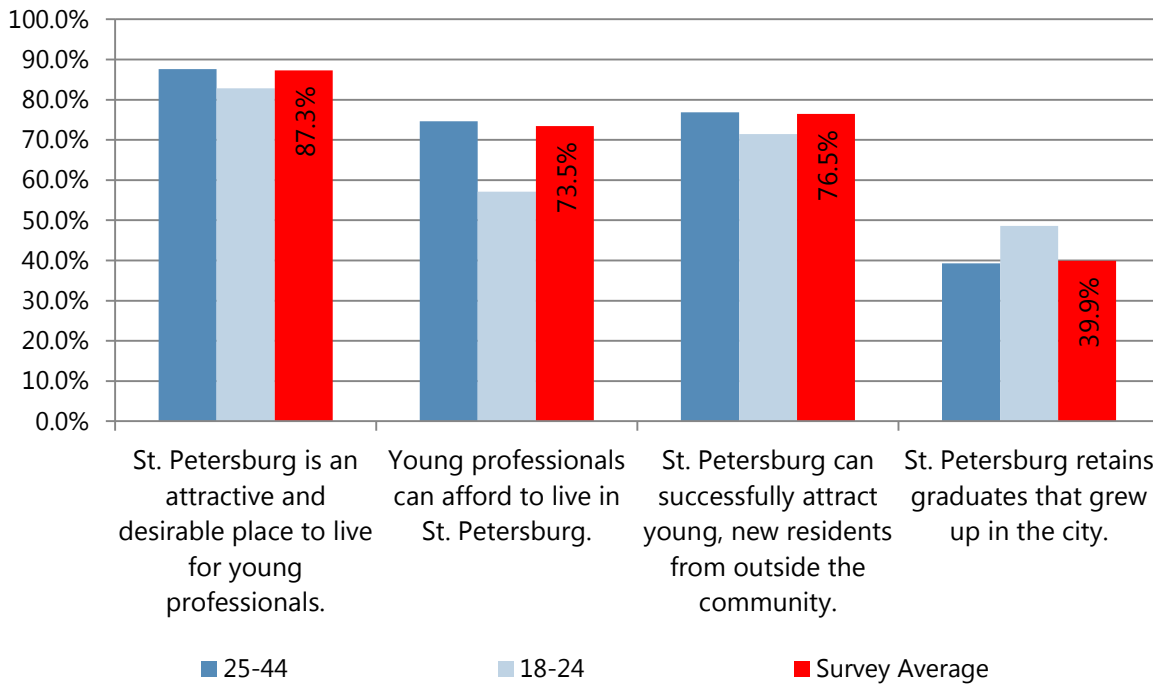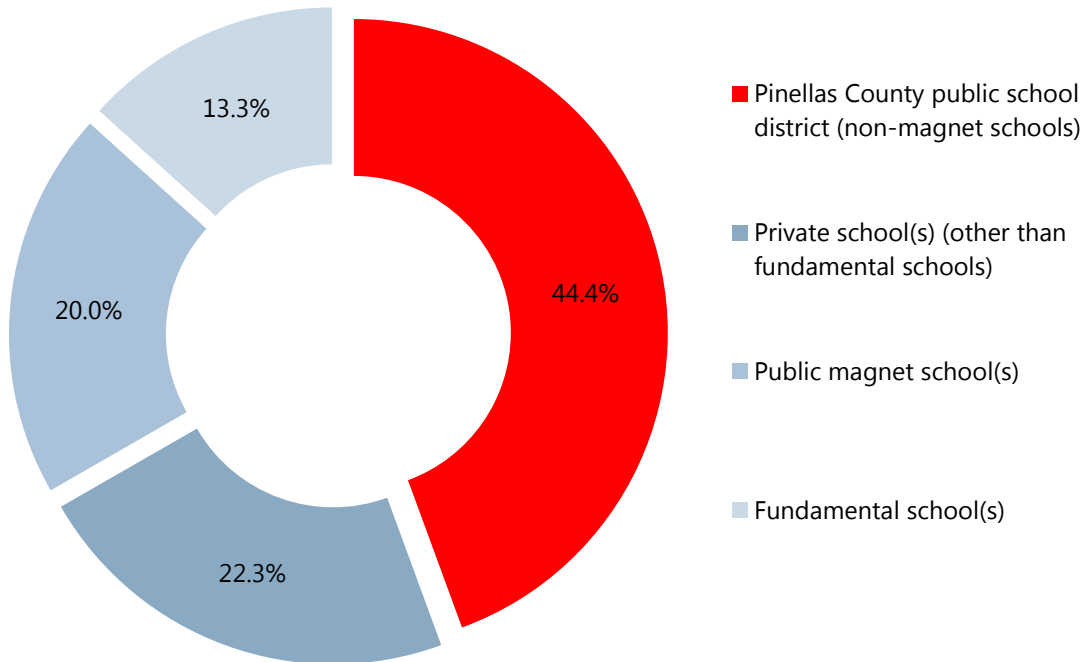

Q37: If you will not continue to live in the community, and/or feel your children will not choose to live in the community, why do you feel this way?

- *As I grow older, I desire to use my vehicle less and public transportation more and am looking for a city or town to accommodate that.*
- *I will relocate to another area that gives more to the arts, where counties and cities have more resources to invest in the arts, and the culture is more stable. The police department spent $250,000 on a tank; the city has $175,000 to grant to ALL arts groups. This city has its priorities wrong.*
- *Beautiful waterfront and beaches*
- *Lack of up and coming career opportunities.*
- *My adult children want to see more diversity, and partake in a more vibrant social and networking scene for their age group (20's).*
- *The school system is a real challenge. A lot of the zoned schools are poor and it's very stressful and difficult to chase the magnet/fundamental school programs.*
- *I am not sure I will be paid enough to stay here, and I am not sure it is a safe place to raise children. Also, Pinellas County lacks a strong public school system.*

Q38: Do you have school-age children or do you feel qualified to answer questions about St. Petersburg's pre-K to 12 school systems?

31.9%

68.1%

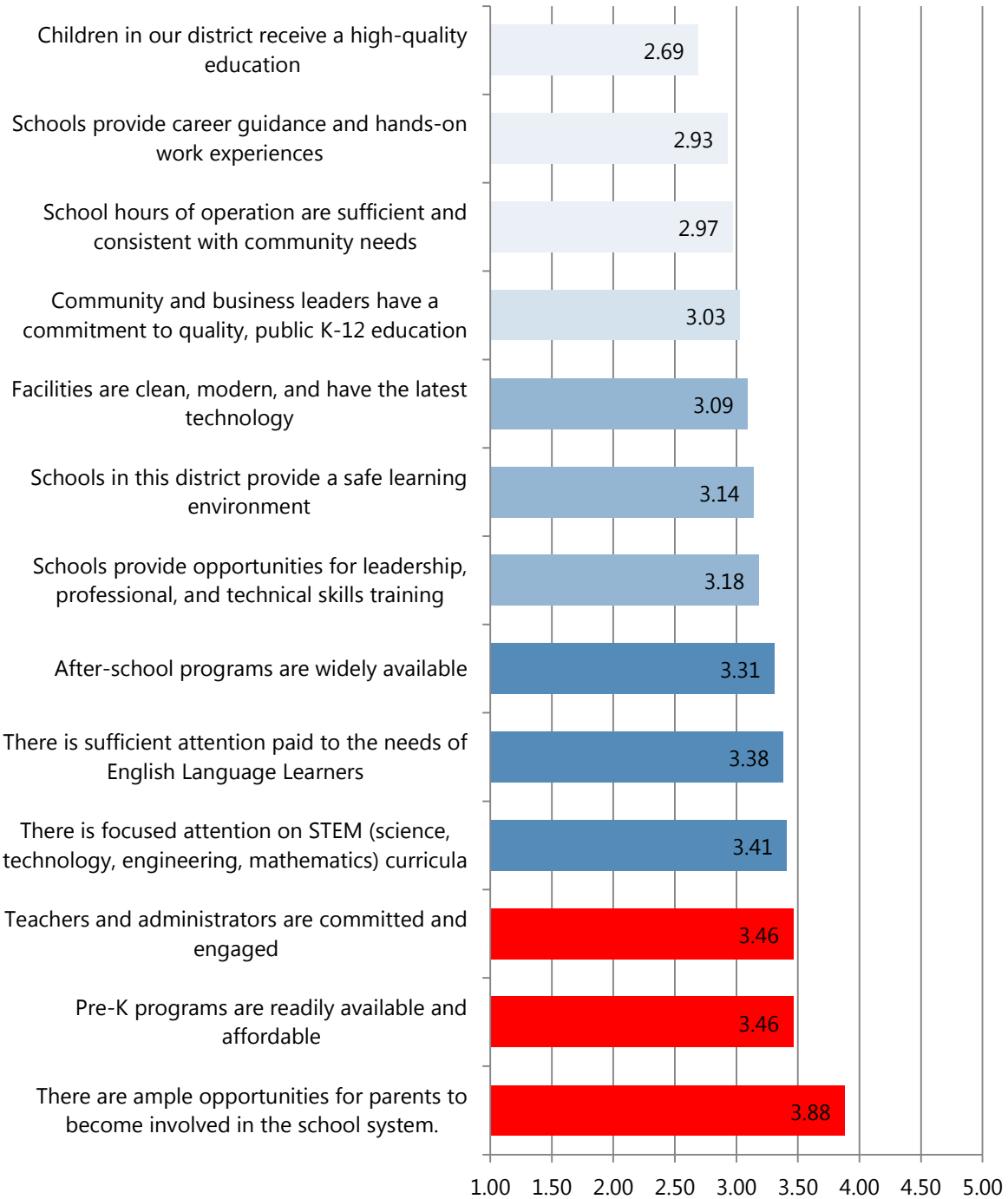■ Yes

■ No

Q39: I am most familiar with:

13.3%

20.0%

44.4%

22.3%

■ Pinellas County public school district (non-magnet schools)

■ Private school(s) (other than fundamental schools)

■ Public magnet school(s)

■ Fundamental school(s)

Q40: Please respond to the following statements about public school quality in St. Petersburg.

(1 = Strongly Disagree, 5 = Strongly Agree)

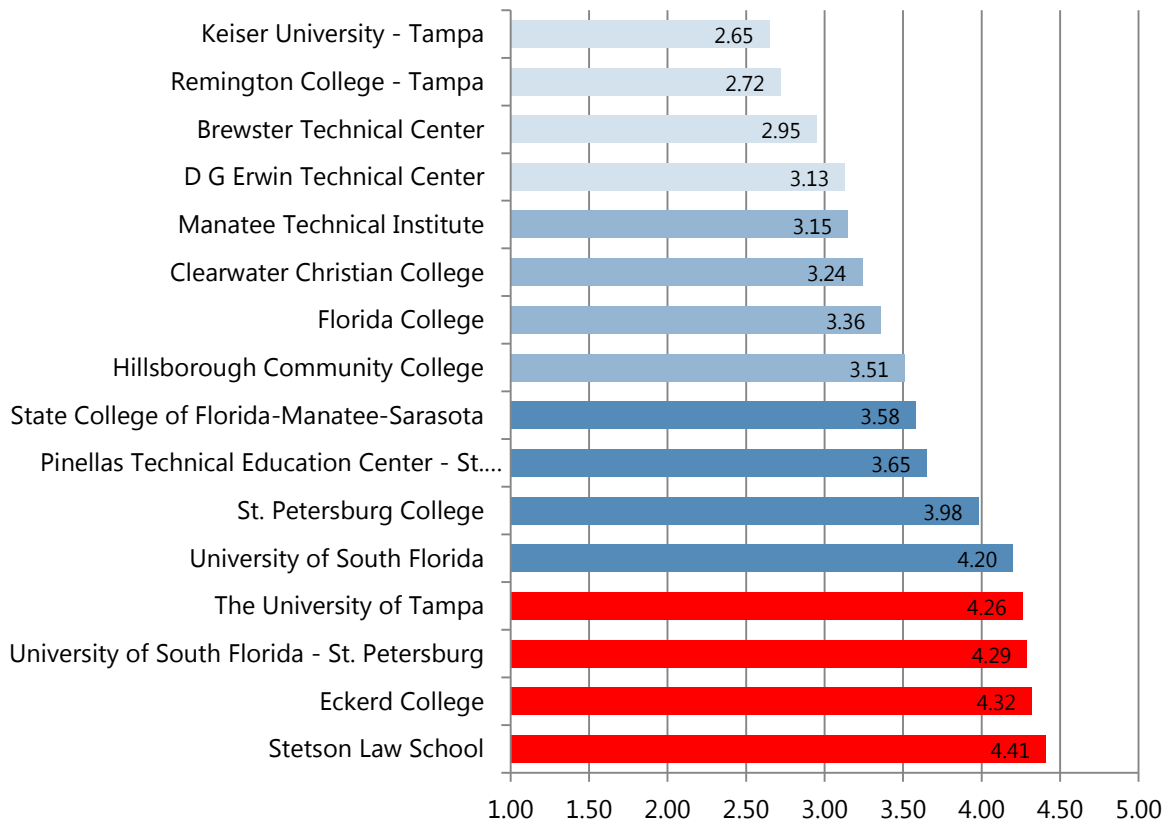| Statement	Rating
Children in our district receive a high-quality education	2.69
Schools provide career guidance and hands-on work experiences	2.93
School hours of operation are sufficient and consistent with community needs	2.97
Community and business leaders have a commitment to quality, public K-12 education	3.03
Facilities are clean, modern, and have the latest technology	3.09
Schools in this district provide a safe learning environment	3.14
Schools provide opportunities for leadership, professional, and technical skills training	3.18
After-school programs are widely available	3.31
There is sufficient attention paid to the needs of English Language Learners	3.38
There is focused attention on STEM (science, technology, engineering, mathematics) curricula	3.41
Teachers and administrators are committed and engaged	3.46
Pre-K programs are readily available and affordable	3.46
There are ample opportunities for parents to become involved in the school system.	3.88

Q41: What do you think needs to be done to improve your school or school system?

Strategy	Number of Respondents
More parent involvement/accountability	53
Increase teacher pay	31
Address underperforming public schools	29
Give admin more authority	25
Less focus on teaching for tests/FCAT	24
More teacher/admin training/education	21
Coincide start and end times with a common work day (start later get out later)	17
Increase public school funding	14
Safety on school grounds	14
Need smaller class size	12

Q42: Please rate the quality of public and private colleges and universities within 25 miles of St. Petersburg:
(1 = Poor, 5 = Excellent)

College/University	Rating
Keiser University - Tampa	2.65
Remington College - Tampa	2.72
Brewster Technical Center	2.95
D G Erwin Technical Center	3.13
Manatee Technical Institute	3.15
Clearwater Christian College	3.24
Florida College	3.36
Hillsborough Community College	3.51
State College of Florida-Manatee-Sarasota	3.58
Pinellas Technical Education Center - St....	3.65
St. Petersburg College	3.98
University of South Florida	4.20
The University of Tampa	4.26
University of South Florida - St. Petersburg	4.29
Eckerd College	4.32
Stetson Law School	4.41

Q43: Please assess the following aspects of higher education in greater St. Petersburg:
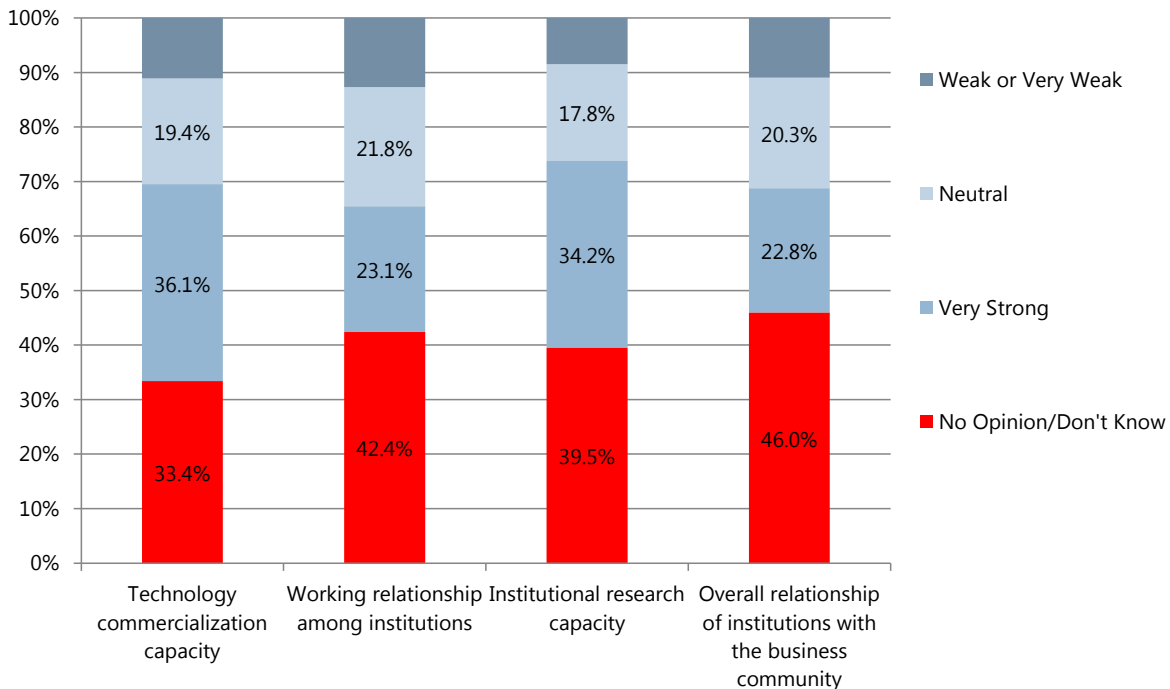
Q44: Do you have any final comments you'd like to make about St. Petersburg or the Community Economic Development Strategy process?

- *We need continual strong support of the arts community. Keeping our waterways clean and safe is also important, very important.*
- *Please do not sacrifice the environment to bring in industry for jobs. We have had enough of that.*
- *Strongly encourage the efforts to diversify our economy and bring other quality jobs to our community.*
- *Let's keep an open mind about our decisions on community development and community building because if all is not included you are going to discover that there will are going to be more crimes, etc.*
- *Let put some real effort into the 2020 plan*
- *I'd like to see more done with the educational and medical complex on the south side of St. Petersburg to integrate this more into the community. I'd also like to get the issue of the Pier settled and done so we can all enjoy this.*
- *Get the Pier redone and open please. Ensure that all of the city has access to waterfront parks, the Saturday Market, etc.*
- *St. Petersburg is a great city for so many reasons. As you look to the future consider how to better connect the community as a whole along with how to better connect St. Petersburg with the surrounding cities. Public transportation is going to be very important. We love how easy it is to get around St. Pete and want to insure that stays the same while we continue to grow.*

APPENDIX B: METHODOLOGY

This Competitive Assessment examines the City of St. Petersburg's trends in the context of People, Prosperity, and Place factors and the narrative stories conveyed by quantitative and qualitative analysis. The **comparison cities** of Durham, North Carolina; Jacksonville, Florida; and Orlando, Florida were selected in partnership with St. Petersburg Area Chamber staff and volunteer leaders based on a matrix of economic and demographic indicators and trends. The comparison communities are assumed to be areas that St. Petersburg could legitimately compete against for talent and investment. While they should not be taken as three communities St. Petersburg should seek to become, there are nevertheless certain "aspirational" traits in these three counties that the city would benefit from emulating. For some indicators, St. Petersburg was benchmarked against the Tampa-St. Petersburg-Clearwater, Florida Metropolitan Statistical Area, as defined by the February 2013 Office of Management and Budget Bulletin, which consists of four counties: Hernando, Hillsborough, Pasco, and Pinellas. For many economic indicators, *Market Street* employed ZIP code-level data from EMSI. In those instances, the following definitions were utilized as proxies for the respective city:

St. Petersburg, FL: 33701, 33702, 33703, 33704, 33705, 33710, 33711, 33712, 33713, and 33716

Durham, NC: 27701, 27704, 27705, 27707, 27709, 27712, and 27713

Jacksonville, FL: 32202, 32204, 32205, 32206, 32207, 32208, 32209, 32210, 32211, 32212, 32216, 32217, and 32218

Orlando, FL: 32801, 32803, 32804, 32805, 32806, 32807, 32808, 32809, 32811, 32812, 32814, 32819, and 32822

Market Street used the most recent data available for this Competitive Assessment. Reputable and reliable private, non-profit, local, state, and national government data sources were leveraged, with every effort made to match methodologies and units of comparison across sources to provide the most accurate and informative analysis of St. Petersburg's demographic trends, economic structure, and sense of place. National government sources used in this analysis included the U.S. Census Bureau; the Federal Bureau of Investigation; and the statistics or information divisions of several federal government department bureaus. For city-level data, utmost care was taken to use the most accurate data sources. For example, the margins of error of the one-year estimates from the U.S. Census Bureau were less robust than the three-year estimates, thus the three year estimates have been used where possible.

Location quotients are used throughout this report to measure the relative concentration of local employment in a given business sector or occupation. When applied to business sector employment, they measure the ratio of a business sector's share of total regional employment to that business sector's share of total national employment.

$$LQ = \frac{\text{(Local Employment in Sector / Total Local Employment)}}{\text{(National Employment in Sector / Total National Employment)}}$$

A business sector with an LQ equal to 1.0 possesses exactly the same share of total county employment as that business sector's share of national employment. When a local business sector possesses a location quotient greater than 1.0, this signals that the business sector is more concentrated in the city than it is nationwide. Conversely, a location quotient less than 1.0 indicates that the business sector is less concentrated in the city than it is nationwide. The higher the location quotient, the more concentrated the level of local employment as compared to its national equivalent. For example, a location quotient of 1.25 would indicate that a local business sector's share of total employment is 25 percent higher than the same business sector's share of national employment. An LQ of 2.0 would indicate that a business sector's share of local employment is twice as large as the national share, while an LQ of 0.5 would indicate that the business sector's share of local employment is half the national equivalent.

APPENDIX C: DATA SOURCES

The Grow Smarter Competitive Assessment utilized the following data sources; each data source gives a brief description regarding the reporting agency along with its data collection methodology. These public data sources are trusted, and guide many public and private investment decisions whether it is corporate headquarters relocation, or a municipal urban planner.

ABOUT THE AMERICAN COMMUNITY SURVEY

The American Community Survey (ACS) is a nationwide survey designed to provide communities with a fresh look at how they are changing. It is a critical element in the Census Bureau's decennial census program. The ACS collects information such as age, race, income, commute time to work, home value, veteran status, and other important data. The American Community Survey has replaced the decennial census long form which was discontinued in the 2010 decennial census.

In years past, the decennial census had two parts: 1) the short form, which counts the population; and 2) the long form, which obtains demographic, housing, social, and economic information from a 1-in-6 sample of households. Information from the long form is used for the administration of federal programs and the distribution of billions of federal dollars.

Since this is done only once every 10 years, long-form information becomes out of date. Planners and other data users are reluctant to rely on it for decisions that are expensive and affect the quality of life of thousands of people. The American Community Survey is a way to provide the data communities need every year instead of once in ten years.

Collecting data every year provides more up-to-date information throughout the decade about the U.S. population at the local community level. About 3.5 million housing unit addresses are selected annually, across every county in the nation.

American Community Survey Coverage

Single-Year Estimates

The ACS produces 1-year estimates annual for geographic areas with a population of 65,000 or more. This includes the nation, all states and the District of Columbia, all congressional districts, approximately 800 counties, and 500 metropolitan and micropolitan statistical areas, among others.

Multiyear Estimates

The ACS produces 3-year estimates annually for geographic areas with a population of 20,000 or more, including the nation, all states and the District of Columbia, all congressional districts, approximately 1,800 counties, and 900 metropolitan and micropolitan statistical areas, among others.

In 2010, the Census Bureau released the first 5-year estimates for small areas. These 5-year estimates are based on ACS data collected from 2005 through 2009.

ABOUT CURRENT POPULATION ESTIMATES

Each year, the U.S. Census Bureau produces and publishes estimates of the population for each state and county, as well as the nation as a whole. The Census Bureau utilizes administrative data from a number of sources to estimate 1) the change in population since the most recent decennial census and 2) the population for each year since the most recent decennial census. With each annual release of population estimates, the entire time series of estimates begging on April 1, 2010 is revised and updated.

At the national level, the resident population is affected by births, deaths, and net international migration (NIM) only as displayed in the following formula:

$$\text{Population Estimate} = \text{Base Population} + \text{Births} - \text{Deaths} + \text{NIM}$$

At the subnational level (i.e. states and counties), the resident population is affected by an additional component of population change: net internal, or domestic, migration (NDM) as shown below:

$$\text{Population Estimate} = \text{Base Population} + \text{Births} - \text{Deaths} + \text{NIM} + \text{NDM}$$

Base population is determined by the most recent decennial census count which serves as the starting point for all post-2010 population estimates. Information on births and deaths are collected from the National Center for Health Statistics (NCHS) which collect birth and death statistical information for the entire United States. The net international migration component stems from data reported by the American Community Survey along with the Defense Manpower Data Center (DMDC) which collects information on the Armed Forces population, demographic characteristics, and state distributions. Finally, Internal Revenue Service data are leveraged to produce net internal migration figures.

ABOUT BUREAU OF ECONOMIC ANALYSIS

As an agency of the Department of Commerce, the Bureau of Economic Analysis (BEA) produces economic accounts statistics the enable government and business decision-makers, researchers, and the American public to follow and understand the performance of the Nation's economy. BEA's economic statistics, which provide a comprehensive, up-to-date picture of the U.S. economy, are key ingredients in critical decisions affecting monetary policy, tax and budget projections, and business investment plans. The cornerstone of BEA's statistics is the national income and product accounts (NIPAs), which feature the estimates of gross domestic product (GDP) and related measures.

BEA prepares national, regional, industry, and international accounts that present essential information on such key issues as economic growth, regional economic development, interindustry relationships, and the Nation's position in the world economy. Along with these figures, the Bureau of Economic Analysis also publishes figures on national, state, and local personal income.

ABOUT BUREAU OF LABOR STATSTICS

The Bureau of Labor Statistics of the United States Department of Labor is the principal Federal agency responsible for measuring labor market activity, working conditions, and price changes in the economy. Its mission is to collect, analyze, and disseminate essential economic information to support public and private

decision-making. As an independent statistical agency, BLS serves its diverse user communities by providing products and services that are objective, timely, accurate, and relevant.

Quarterly Census of Earnings and Wages

The Quarterly Census of Earnings and Wages (QCEW) originated in the 1930s, and was formerly known as the ES-202 program until 2003 when the current QCEW name was adopted. The primary economic product is the tabulation of employment and wages of establishments which report to the Unemployment Insurance (UI) programs of the United States. Employment covered by these UI programs represents about 99.7 percent of all wage and salary civilian employment in the country.

The QCEW employment count is a total derived from quarterly contribution reports filed by almost every employer in the U.S., Puerto Rico, and the U.S. Virgin Islands. It counts only filled jobs, whether full or part time, temporary or permanent, by place of work. The quarterly reports include the establishment's monthly employment levels of the pay periods that include the twelfth of the month for the nation, states, metropolitan statistical areas, and counties.

Because the QCEW data is based on an establishment census which counts only filled jobs, it is likely that a multi-job holder will be counted two or more times in QCEW data.

Major exclusions from UI coverage include self-employed workers, most agricultural workers on small farms, all members of the Armed Forces, elected officials in most states, most employees of railroads, some domestic workers, most student workers at schools, and employees of certain small nonprofit organizations.

Under most State laws or regulations, wages include bonuses, stock options, severance pay, profit distributions, cash value of meals and lodging, tips and other gratuities, and, in some States, employer contributions to certain deferred compensation plans such as 401(k) plans.

Covered employers in most States report total compensation paid during the calendar quarter, regardless of when the services where performed. A few State laws, however, specify that wages be reported for or based on the period during which services are performed rather than the period during which compensation is paid.

Local Area Unemployment Statistics

The Local Area Unemployment Statistics (LAUS) is a Federal-State cooperative effort in which monthly estimates of total employment and unemployment are prepared for approximately 7,300 areas including:

- ✓ Census regions and divisions
- ✓ States
- ✓ Metropolitan Statistical Areas and Metropolitan NECTAS (New England City and Town Areas)
- ✓ Metropolitan Divisions and NECTA Divisions
- ✓ Micropolitan Statistical Areas and Micropolitan NECTAs
- ✓ Combined Metropolitan Statistical Areas and Combined NECTAs
- ✓ Small Labor Market Areas

- ✓ Counties and county equivalents
- ✓ Cities of 25,000 population or more
- ✓ Cities and towns in New England regardless of population

The concepts and definitions underlying LAUS data come from the Current Population Survey (CPS), the household survey that is the official measure of the labor force for the nation. Estimates for substate labor market areas are produced through a building-block approach known as the "Handbook method." This procedure also uses data from several sources, including the CPS, the CES program, State UI systems, and the decennial census, to create estimates that are adjusted to the statewide measures of employment and unemployment

ABOUT ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)

Economic Modeling Specialists Intl., recently acquired by CareerBuilder, turns labor market data into useful information that helps organizations understand the connection between economies, people, and work, Using sound economic principles and good data, EMSI builds user-friendly services that help educational institutions, workforce planners, and regional developers (such as WIBs, EDOs, chambers, utilities) build a better workforce and improve the economic conditions in their regions.

In order to report employment figures, EMSI collects data from more than 90 public sources. These data sets include, but are not limited to:

Bureau of Economic Analysis

- ✓ Local Area Annual Estimates
- ✓ Local Personal Income Reports
- ✓ State Annual Estimates
- ✓ State Quarterly Income Estimates
- ✓ Industry Economic Accounts

United States Census Bureau

- ✓ American Community Survey
- ✓ County Business Patterns
- ✓ Zip code Business Patterns
- ✓ Non-employer Statistics

Bureau of Labor Statistics

- ✓ Quarterly Census of Employment and Wages (QCEW)
- ✓ Current Employment Statistics
- ✓ Current Population Survey (CPS)
- ✓ Local Area Unemployment Statistics (LAUS)
- ✓ National Compensation Survey
- ✓ National Industry-Occupation
- ✓ Employment Matrix (10-year, current and projected)

- ✓ Employment by Occupation (10-year, current and projected)
- ✓ Occupational Employment, Training, and Earnings

Employment and training Administration

- ✓ Characteristics of the Insured Unemployed
- ✓ National O*NET Consortium, O*NET Production Database

U.S. Department of Education, National Center for Education Statistics

- ✓ Integrated Postsecondary Education Data System (IPEDS)
- ✓ Common Core of Data (CCD)
- ✓ Characteristics of Private Schools in the United States

In order to develop employment by industry tables contained with this report, *Market Street* utilized EMSI's QCEW, Non-QCEW, and Self-Employed data sets to better capture economic activity within a community.

QCEW employment includes an enhanced, unsuppressed version of the Bureau of Labor Statistic's Quarterly Census of Employment and Wages. It is commonly referred to as "covered employment" because it counts all jobs covered by the federal or state unemployment insurance (UI) system.

Non-QCEW Employees includes a relatively small number of wage-and-salary employees that are exempt from UI coverage, and are not included in QCEW employment data. Major types of jobs in this category include the military, railroads, small nonprofit/religious organizations, real estate and insurance/finance agents, work-study students, and other miscellaneous employees.

Self-Employed data cover people who, when responding to the American Community or decennial census surveys, consider self-employment to be a significant part of their income and/or taking a significant part of their time. Most people normally considered "self-employed" would fall into this dataset.

APPENDIX D: KEY TERMS

Per Capita Income: Personal income is income that is received by persons from all sources. It is calculated as the sum of wages and salaries, supplements to wages and salaries, proprietors' income with inventory valuation and capital consumption adjustments, rental income from persons with capital consumption adjustment, personal dividend income, personal interest income, and personal current transfer receipts, less contributions for government social insurance.

Per capita income is measured by calculating the personal income of the residents of a given area, inclusive of the personal income types stated above, by the resident population of the area.

Median Household Income: For households and families, the median incomes based on the distribution of the total number of households and families including those with no income. The median divides the income distribution into two equal parts: one-half of cases falling below the median income and one-half above the median.

Eight types of income reported in the American Community Survey. Types of income covered by the survey include wage or salary income; self-employment income; interest, dividends, net rental income, royalty income, or income from estates and trusts; social security income, supplemental security income; public assistance income; retirement, survivor, or disability income; and all other income (such as unemployment compensation, worker's compensation, alimony and child support, and other kinds of periodic income other than earnings).

Median household income figures differ from per capita income figures for two primary reasons 1) per capita income is a calculated average, rather than the median that reports the midpoint of a specific data set and 2) median household income is reported by the survey respondent whereas per capita income figures utilize administrative data from state unemployment insurance programs, the Social Security Administration, the Internal Revenue Service, and the United States Department of Defense.

Average Annual Earnings: EMSI reports the average earnings by business sector within a given region. Calculations are based on the total county annual earnings of a business sector divided by the county employment within the respective sector. Earnings figures include wages, salaries, supplements (additional employee benefits), and proprietor income.

Poverty Rate: The Census Bureau uses a set of dollar value thresholds that vary by family size and composition to determine who is in poverty. If a family's total income is less than the dollar value of the appropriate threshold, then that family and every individual in it are considered to be in poverty. Similarly, if an unrelated individual's total income is less than the appropriate threshold, then that individual is considered to be in poverty.

The total number of people below the poverty level is the sum of people in families and the number of unrelated individuals with incomes in the last 12 months below the poverty threshold. In 2013, the most the federal poverty threshold for a family of four with two children was $23,624.