

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

Thank you to the organizations that have provided financial/ in-kind resources to produce this 2023 Collier County Community Assessment in partnership with Q-Q Research Consultants: Richard M. Schulze Family Foundation, Collier Community Foundation, Naples Daily News, Naples Children & Education Foundation, Healthcare Network of SWFL, and Florida Gulf Coast University Foundation.

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EXECUTIVE SUMMARY



Assessment Objectives and Goals

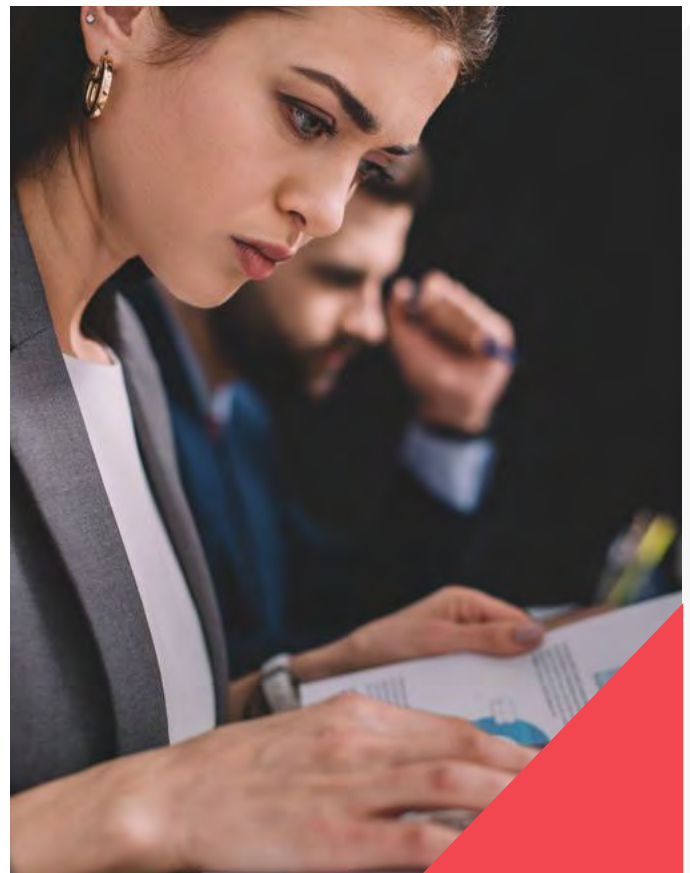
This Collier County Community Assessment (CCCA) offers a portrait of Collier County and the needs of its residents by presenting data on demographic and socioeconomic characteristics, as well as an appraisal of the economic, physical, service, and social environments, including the following seven domains: 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

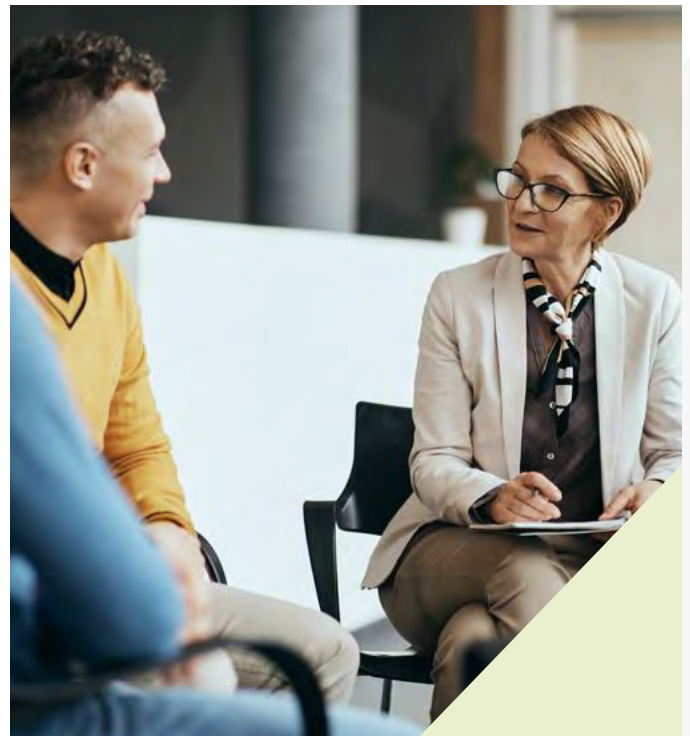
The BCAS also explored attitudes about the environment and climate change readiness. It is worth noting that the survey was conducted just following Hurricane Ian, which caused widespread damage in Collier County. Despite this, attitudes were fairly mixed on a question addressing satisfaction with climate 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.



Photo courtesy of Habitat for Humanity of Collier County.

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.

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.

INTRODUCTION



Community Assessment Overview

Founded in 2004, the Richard M. Schulze Family Foundation (RMSFF) supports meaningful investments that produce specific and measurable outcomes with a focus on 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. To better understand the needs and issues affecting the residents of Collier County, RMSFF, in partnership with the Collier Community Foundation, first contracted Q-Q Research Consultants (QQRC) to design and implement a Collier County Community Assessment (CCCA) in 2017-2018. In 2022, a second CCCA was requested to provide updated data. This current report has the same goals as the previous report (listed below), with a more focused scope on priority areas and related updates to illustrate trends over time.

This 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 and Mental Health, 5) Housing, 6) Infrastructure and Transportation, and 7) Special Populations. While this report illustrates specific community needs that have an impact on residents' everyday lives, it also moves beyond specifics to provide a broader analysis of foundational issues that impact people's quality of life along with assets found within the county. The CCCA captures conditions in the local environment that contribute to residents' quality of life, such as housing costs, access to health care, places for recreation, and physical safety. Further, this report both refines and expands on the work of the previous report by synthesizing the priority areas focused on and incorporating secondary data more succinctly.

In alignment with the 2017-2018 report, 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 when possible. 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 a variety of community issues, including community organizations and civic leaders. RMSFF looks forward to joining community stakeholders in utilizing this CCCA to continue to lead efforts to improve the quality of life in Collier County.

Report Format

The report is organized into **six** principal sections:



The **Introduction** section establishes the primary goals and objectives of the CCCA and describes the overall structure of the report. The **Methodological Approach** section reaffirms assessment goals, describes data collection methods and tools, identifies approach limitations, and explains the identification of community need(s). The **Collier County Snapshot** section provides key background information on the county, describes Collier County's Planning Communities, and details population data.

The **Findings by Domain** section presents the quantitative and qualitative findings of the CCCA organized by the seven domain areas previously mentioned. Within each domain area, community differences and disparities are discussed. Finally, **Community Identified Priorities** and **Concluding Foundational Issue(s)** are presented.

About the Data

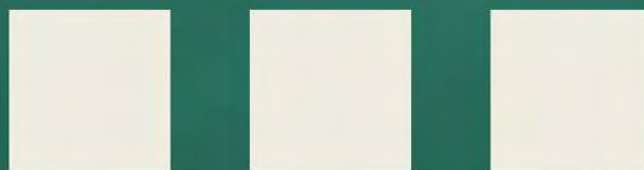
A significant portion of the data in this report comes from the Collier County Brief Community Assessment Survey (BCAS), which was developed by QQRC in consultation with the Community Assessment Advisory Committee and administered to 6,072 participants who live or work in Collier

County. Additionally, qualitative data was captured from nine (9) focus groups facilitated by QQRC, along with 15 focus groups facilitated by trained volunteers. Altogether, 231 residents and subject matter experts (SMEs) of the domain areas attended focus groups offered in English, Spanish, and Haitian Creole. Supplementary data sources were also included through the review of 41 prior reports and outside websites and databases, as appropriate.

Disaggregation of Data by Smaller Geographic Regions and Community Subgroups

In alignment with the previous report, most of the data presented in this CCCA are presented at the Collier County level or are disaggregated by zip code. Summaries focusing in more detail on the community priorities disaggregated by zip code are included when available. In addition, brief summaries that address the community priorities of unique populations have been included. The current report specifically analyzes resident needs and priorities by race/ethnicity, age, and socioeconomic status. Such analyses are essential for prioritizing the provision of assistance efforts aimed at reducing and eliminating disparities among particular subgroup populations.

METHODOLOGICAL APPROACH



Description of Methodological Approach

The same methodological approach as the 2017-2018 CCCA was taken for this report but refined in order to provide concise updates and make comparisons. 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 BCAS. Qualitative data were obtained from focus groups facilitated by QQRC team members and focus groups facilitated by trained community volunteers. Additionally, a series of documents containing secondary data were analyzed in order to leverage existing information. The procedures and methodology employed for data collection using each assessment method are described in the sections that follow.

Community Survey

The BCAS was designed to be brief and minimize the burden on respondents. In addition to items on participant demographics, the survey included items targeting 1) whether the respondent felt that residents in their neighborhood had access to key services, 2) their satisfaction with services, and 3) what topics they felt should be prioritized by community leaders moving forward.

The BCAS aimed for a large and approximately representative sample to accurately capture community attitudes and perceptions. QQRC used demographic information from the United States Census to determine the estimated population size of each zip code in Collier County. Based on an anticipated sample size of 5,000, the research constructed sample targets for each zip code in the county, and a stratified convenience sampling approach with quotas by zip code was used. Community partners helped with outreach to ensure broad participation. The BCAS was available online and in-print in English, Spanish,



and Haitian Creole. Through these efforts, the research team and partners were able to obtain a sample of 6,072 respondents that was well-balanced in terms of geographical representation.

This report presents descriptive statistics from the BCAS, particularly the proportion of respondents selecting each response. This gives insight into topics where county-wide public sentiment was relatively strong or weak. In addition, the data were disaggregated by zip code to determine whether attitudes varied from one area to another. For each survey item, this report mentions the zip codes and corresponding neighborhoods where satisfaction was lowest. The research team also performed chi-squared statistical tests to determine whether there were significant differences by income level and race/ethnicity. The findings below mention instances where specific groups expressed greater dissatisfaction. This is included only when group differences are both statistically significant and large enough to be of interest to community leaders and other stakeholders.



Focus Groups

Twenty-four (24) focus groups were conducted with 231 total participants across Collier County, either facilitated by QQRC or trained volunteers. Each group included seven to fifteen participants.

QQRC-Led Focus Groups

Nine focus groups were led by the QQRC team (referred to as QQRC-led focus groups throughout the report) to explore particular themes and issues along with the needs of unique populations more profoundly. The QQRC-led focus groups included a total of 95 participants. Like the 2017-2018 report, the following themes were identified by the Assessment Advisory Committee for in-depth analysis via QQRC-led focus groups: Education, Environment, Housing, Health Care, and Infrastructure and Transportation, with the addition of Mental Health and Special Populations; Haitian Creole-speaking residents, and Spanish-speaking residents (34142 Immokalee) were also included, as in the 2017-2018 report. Participants were selected due to their knowledge of the chosen topic (e.g., housing, safety) or because they represent a specific group in the community (e.g., older adults, parents of young families). Questions for the focus groups were informed by topics covered in the BCAS.

Focus groups were recorded and transcribed to ensure that the information obtained was high quality. Participants were asked to identify the

main issues related to each topic and who was most affected by these issues. Participants were also asked what areas of the county were most impacted by each problem and what actions were being taken to address these concerns.

Community Volunteer-Led Focus Groups

In addition to the QQRC-led focus groups described above, 15 focus groups were led by a group of selected volunteers (referred to as community volunteer-led focus groups throughout the report) to gather additional qualitative data on Collier County needs and assets at the zip code level. These volunteers have experience conducting focus groups. Further, community volunteer-led focus groups were conducted because these individuals had an established connection to the community, which in turn has the potential to build capacity, trust, and foster participation. The research team developed focus group guides and trained the volunteers to facilitate the groups to ensure the standardization of delivery. The community volunteer-led focus groups included a total of 136 participants. Thirteen focus groups were conducted in the following zip codes: 34114/34117, 34119, 34145, 34109/34110, 34104, 34112, 34102, 34102 (River Park), 34113, 34139, 34120/34142 (Ave Maria), 34103/34105, and 34108. The constituents of the other community volunteer-led focus groups included one group of Veterans and one group of Teachers, First Responders, and Young Professionals.

Document Review and Secondary Data

QQRc conducted a systematic review of 1) relevant documents and 2) secondary data to contextualize findings and inform a more comprehensive analysis.

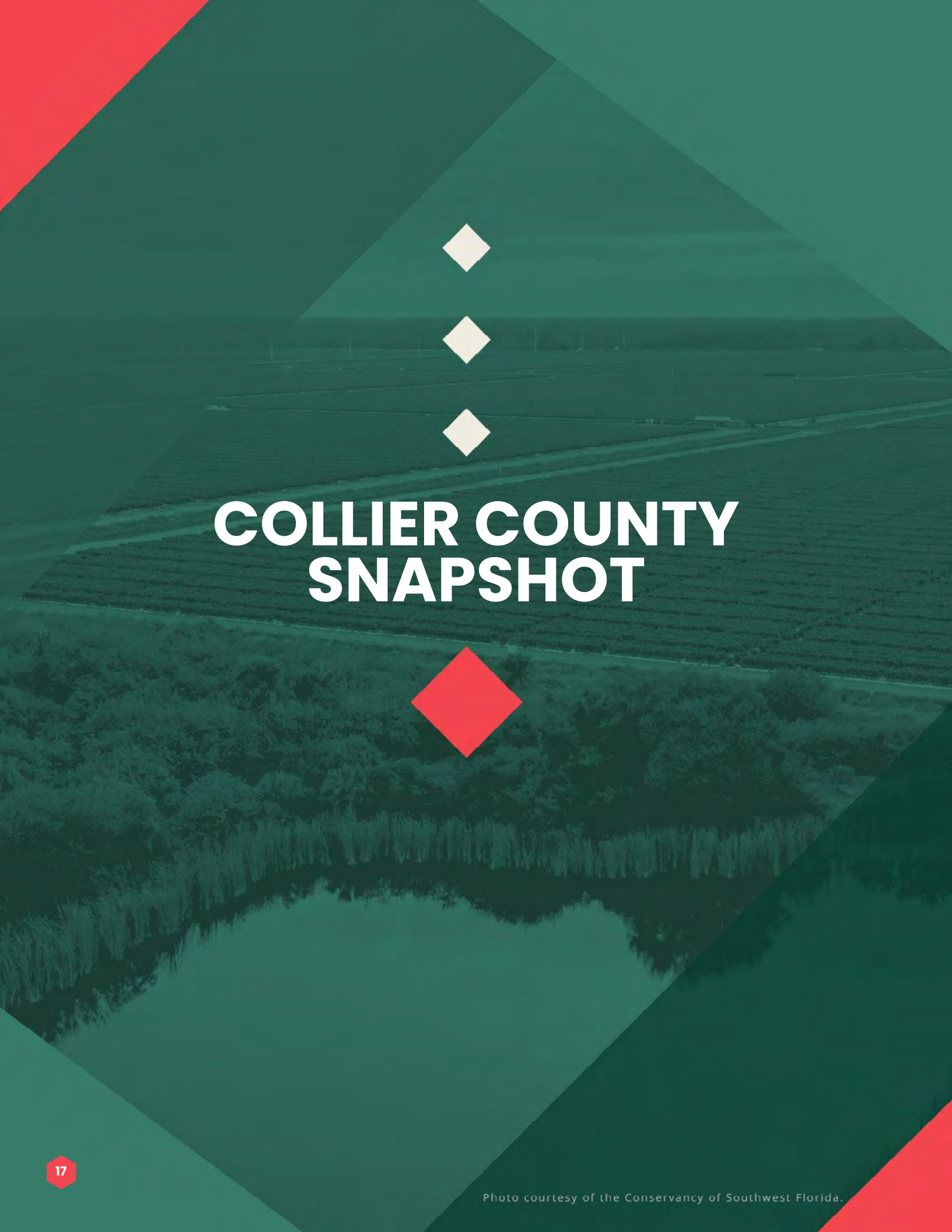
Through cooperation with community partners and Collier County agencies, RMSFF collected an assortment of documents (e.g., reports, assessments) with pertinent data on needs within the county. Other resources (e.g., Census data) were gathered through secondary research methods, such as internet and database searches. Documents were included in the analyses based on relevance to the quantitative and qualitative data collected, relevance to the domain areas, and if the reports were produced between the date range of at least 2018 to 2023 to account for potential data irregularities that arose from COVID-19.

In October 2022, the QQRc team was provided 41 reports for possible inclusion in the document review. Thirty-two (32) of these documents met the established inclusion criteria stated above, and data from 21 of those documents were ultimately used in this report. Notably, this information was used in the Collier County Snapshot section and throughout the Findings as a method of data triangulation. The document review was performed by two Research Analysts. A list of all documents included is provided as an Appendix.

Limitations and Identification of Community Need(s)

This needs assessment faced certain limitations that should be considered when interpreting results.

- **Illustrative, not definitive:** Qualitative methods are associated with several limitations, including 1) generalization of findings can be a challenge as the results are necessarily illustrative and not definitive; 2) biases due to the human nature of interpersonal interaction and communication; and 3) loss of precision, especially in cases where varying opinions exist across samples.
- **Documents reviewed and incorporated:** As reports were identified by working with RMSFF staff and through database and internet searches, it is expected that not all eligible community reports and assessments were included in the document review. This assessment of prior reports includes all biases and limitations that were fundamentally a part of the included reports to begin with, along with those introduced by the current methodology.

An aerial photograph of a landscape in Collier County, Florida, featuring agricultural fields, a body of water, and dense vegetation. The image is overlaid with a dark teal geometric pattern consisting of large triangles. A vertical column of three small, light-colored diamonds is positioned above the title, and a larger red diamond is positioned below it.

COLLIER COUNTY SNAPSHOT

Collier County Background

Collier County, located on Southwest Florida's Gulf Coast, is Florida's 18th most populous county out of 67 counties. The 2022 population estimate for Collier County from the U.S. Census Bureau is 397,994, a 6.7% increase from 2017.¹⁰ Additionally, it is estimated that Collier County adds nearly 100,000 to the population throughout the county's "peak season" from December to April.¹¹ The "peak season" in Collier County is the time of year when many seasonal residents and employees come to Collier County either to live in part-time homes or for work opportunities.

Collier County encompasses 2,305 square miles and is the second largest county by land area (1,998 square miles) in the state of Florida.

Much of the southeastern segment of Collier County is contained within Big Cypress National Preserve, designated to safeguard approximately 700,000 acres of swamplands in South Florida. In addition, the southern coastal segment of the county is contained within the Everglades National Park, which was designated to protect the southern portions of the Everglades wetlands.

The county offers diverse landscapes within its three municipalities (i.e., Everglades City, Marco Island, Naples) and several unincorporated communities. Communities range from densely populated coastal urban/suburban neighborhoods to sparsely populated rural/agricultural communities located about 30 to 45 miles inland. See Figure 1 for a visual presentation of zip codes in Collier County.

FIGURE 1: COLLIER COUNTY ZIP CODES¹²

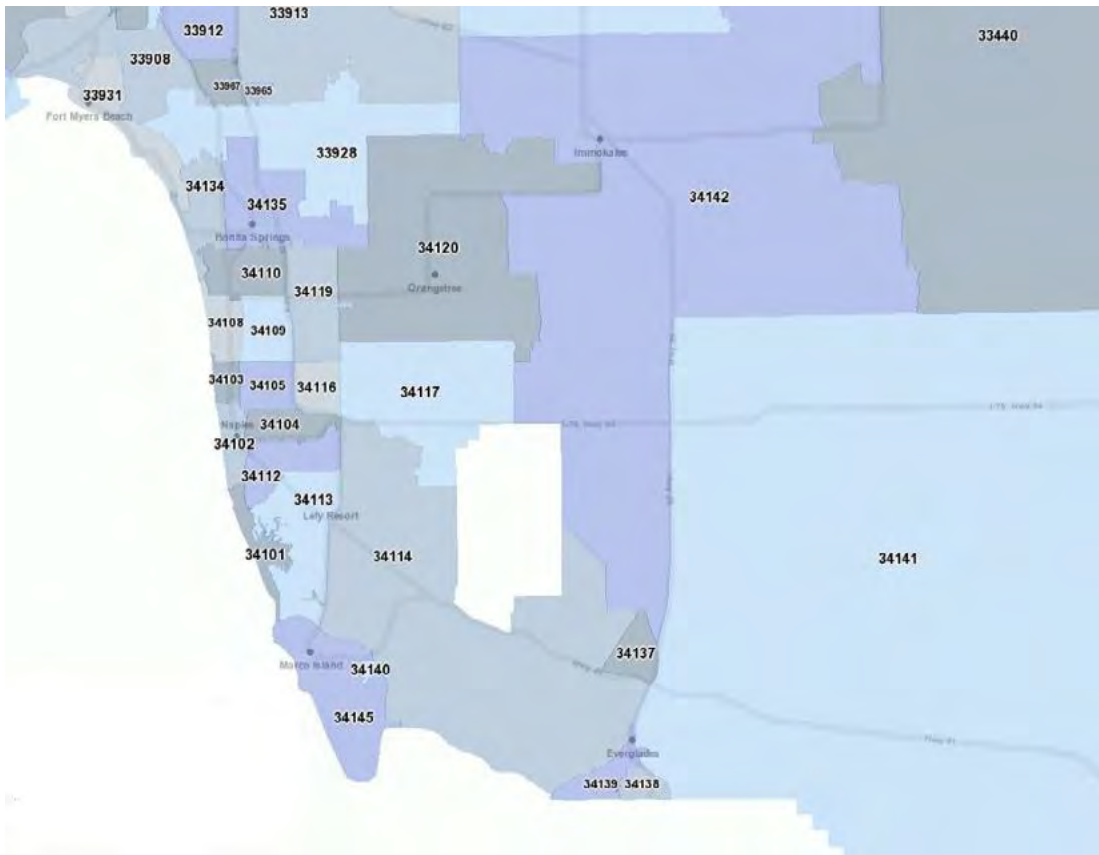
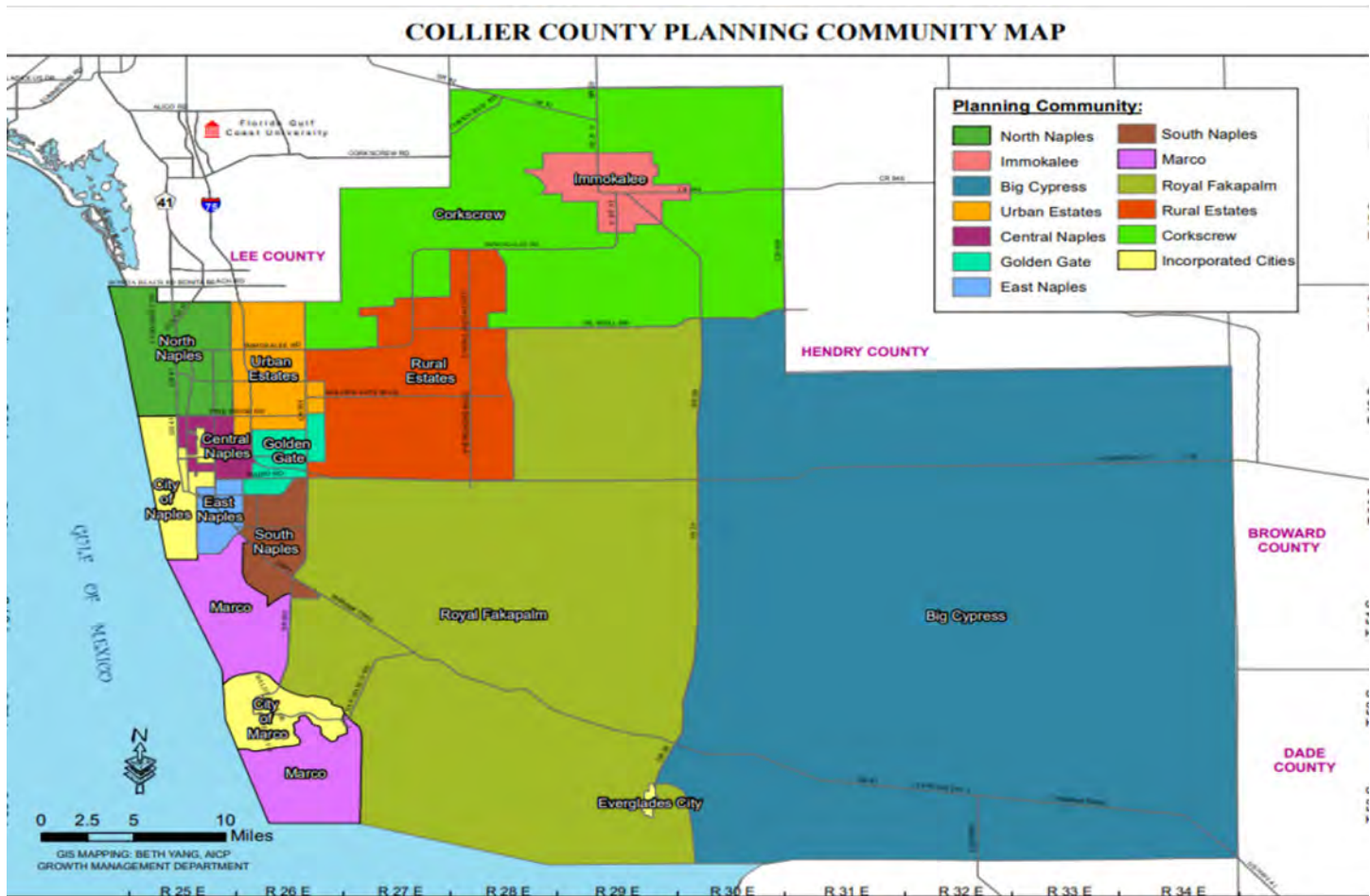
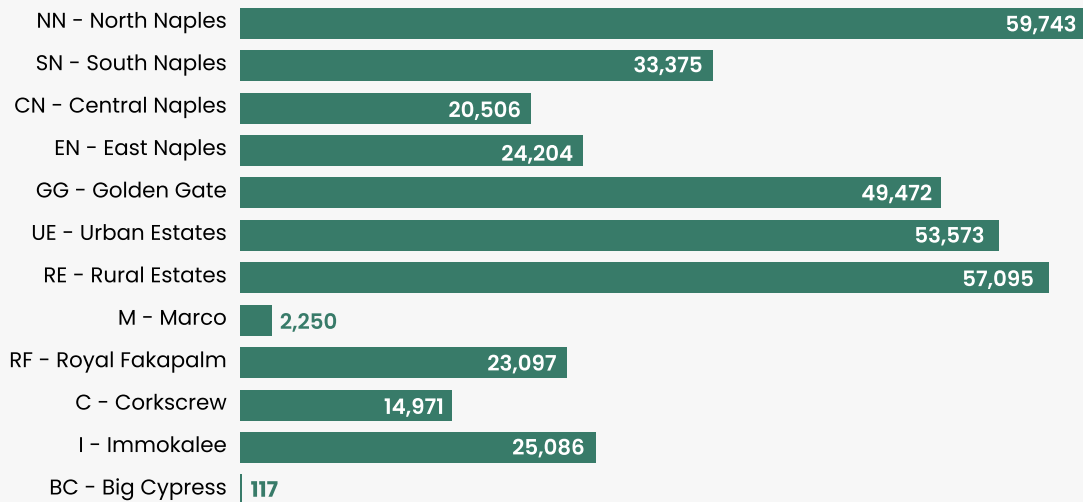


FIGURE 2: COLLIER COUNTY PLANNING COMMUNITIES¹³

Collier County's Planning Communities

The Urban Planning Communities of North, Central, East, and South Naples, Golden Gate, Marco, and Urban Estates are located in the western parts of the county and include the cities of Naples and Marco Island, as seen above in Figure 2. These planning communities are located mostly west of State Road 951 (also known as Collier Boulevard). Zip codes 34101 through 34113, 34116, 34119, and 34145 are located within these urban areas. The majority of land in these planning communities is zoned as urban and contains land marked for estate or residential development and planned unit developments.

The Naples Census County Division (CCD) encompasses several Census Designated Places (CDPs), including the communities of Golden Gate, Island Walk, Lely, Lely Resort, Naples City, Naples Manor, Naples Park, Pelican Bay, Pine Ridge, and the Vineyards. The Marco Island CCD encompasses parts of Marco Island City and Goodland. In addition, east of State Road 951 and contained within the boundaries of the rural planning community of Corkscrew is the planning community (and CDP) of Immokalee, otherwise known as the epicenter of the county's agricultural industry. Most of the agricultural workers and migrant workers reside within its boundaries. The Immokalee CCD includes the Immokalee and Orangetree CDPs.

FIGURE 3: COLLIER COUNTY 2023 POPULATION BY PLANNING COMMUNITY

Prepared by Collier County Comprehensive Planning Section May 16, 2023.

The Urban Planning Communities of Immokalee, Big Cypress, Royal Fakapalm, Rural Estates, and Corkscrew are located inland in the eastern parts of the county and include Everglades City, as seen in Figure 2. These planning communities are located mostly east of State Road 951. Zip codes 34137 through 34142, 34114, 34117, and 34120 are located within these rural areas. Rural Estates and Royal Fakapalm comprise residential regions to the west (closer to the coastal areas) and agricultural/conservation areas to the East and South. The Everglades CCD is contained within this area and is comprised of the CDPs of Chokoloskee, Plantation Island, Verona Walk, and Everglades City. Corkscrew is at the northeastern end of the county and is mostly agricultural land. Finally, Big Cypress is mostly a conservation area and part of Big Cypress National Preserve.

North Naples is the largest of all the planning communities by population, with a projected 2023 population of 59,743, followed closely by Rural Estates with 57,095 (as seen in Figure 3). Big Cypress is the smallest planning community, with only 117 people. However, Big Cypress consists mainly of the Big Cypress conservation area of the Big Cypress National Preserve, which could lend to the much smaller population.

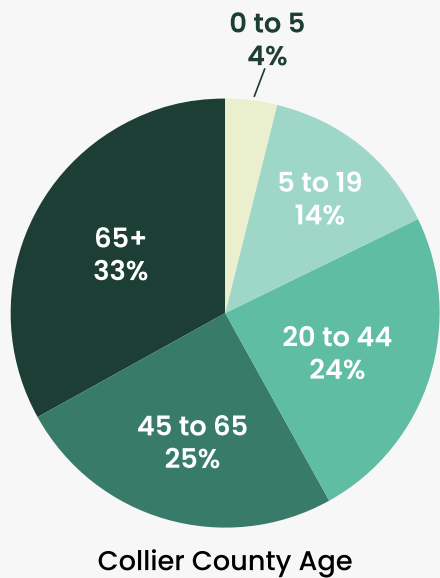
Population Data

Age, Gender, and Other Characteristics

The median age in Collier County is 51.5, compared to the Florida state median age of 42.3 (see figure 4a on next page).¹⁴ Collier County is a relatively older county, with over 33% of the county's population being over the age of 65, compared to 21.6% for Florida state (see figure 4b on next page).¹⁵ In the 2017-2018 CCCA, Collier County was reported as being 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.¹⁶ As of 2021, 4% of Collier County's residents were five and under, 14% were aged 5-19, 24% were aged 20-44, 25% were 45-64, with the remaining 33% of residents aged 65 and older.

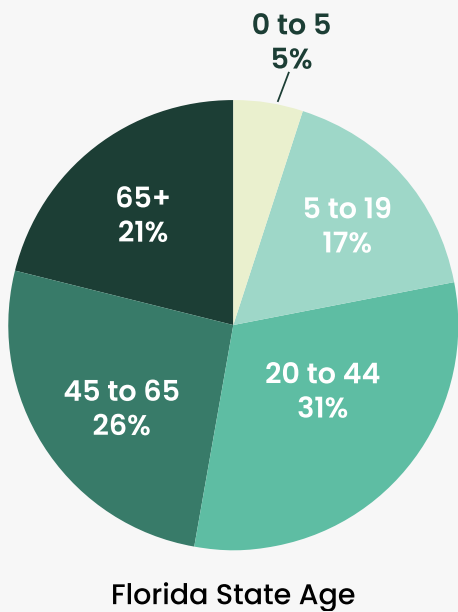
In 2021, 20.4% of households had one or more children under 18 residing in the household.¹⁷ Regarding gender, 50.7% of the population identifies as female, while 48.3% identify as male, almost identical to the state of Florida, in which 50.8% of the population identify as female and 48.2% as male.¹⁸

FIGURE 4A: POPULATION BY AGE GROUPS – COLLIER COUNTY



Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

FIGURE 4B: POPULATION BY AGE GROUPS – FLORIDA



Citation: Florida Health Charts. (2021). Community Social and Economic Factors.

Demographic Shifts

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. Population growth in Southwest Florida has been relatively high for several years and will continue to be high over the next five years, with the population projected to grow by 7% every five years until at least 2050. In comparison, Collier County grew by almost 10% from 2015 to 2020 and is expected to grow by over 8% every five years through 2050.

Overall annual population growth in Florida peaked in 2016 at 2%. While the annual population growth declined somewhat after 2016, it was still higher in Southwest Florida than in the state of Florida as a whole. Collier County has grown annually by over 1% since 2010, with 2016 also being its peak at 2.6% growth. Collier County’s elderly population is expected to grow over the next ten years, with the population over 65 increasing from 33.2% to 37.9%. The share of the population under 25 is projected to decline over this period, falling from 23.1% to 21.5%.¹⁹

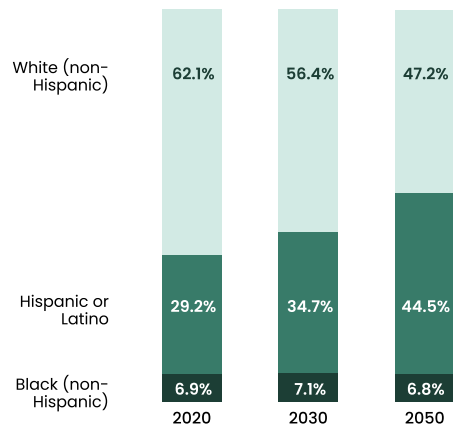
TABLE 2: COLLIER COUNTY PROJECTED POPULATION GROWTH BY AGE

	2020	2030	2050
85+	4.8%	8.0%	20.7%
75-84	12.40%	13.20%	12.40%
65-74	15.90%	16.70%	11.50%
55-64	13.70%	12.00%	9.00%
45-54	11%	9.30%	9.00%
35-44	9.60%	9.20%	9.00%
25-34	9.50%	10.10%	8.20%
18-24	6.50%	6.00%	4.70%
15-17	3.00%	2.60%	2.00%
5 to 14	9.40%	8.20%	8.10%
0 to 4	4.20%	4.00%	4.00%

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

The proportion of minority populations in Southwest Florida is expected to grow over the next ten years. The Hispanic or Latino population is estimated to grow from 23.6% in 2020 to 28.4% by the year 2030. The Black non-Hispanic population is estimated to grow as well, from 7.9% to 8.6%. The White non-Hispanic population is projected to decrease, falling from 66.5% in 2020 to 60.9% in 2030. In comparison, Collier County is projected to see a large increase in the Hispanic or Latino population over the next ten years, rising from 29.2% to 34.7%. The Black non-Hispanic population is expected to stay virtually the same (6.9% in 2020, 7.1% in 2030), while the White non-Hispanic population is estimated to decline over the next decade (62.1% to 56.4%).²⁰

FIGURE 5: COLLIER COUNTY PROJECTED POPULATION GROWTH BY RACE AND ETHNICITY



**Note: this represents the projected population in percent of each race/ethnicity listed for the years represented (2020/2030/2050) in Collier County.*

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

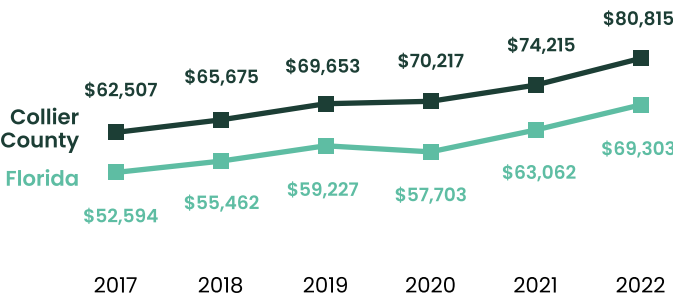
In Collier County, net domestic migration was the main cause of population changes for minority populations. Net domestic migration is calculated by taking the total number of people who move into a state minus the number moving out of the state. After net domestic migration, international migration was the next most common cause of population changes.²¹

Households

Median Household Income

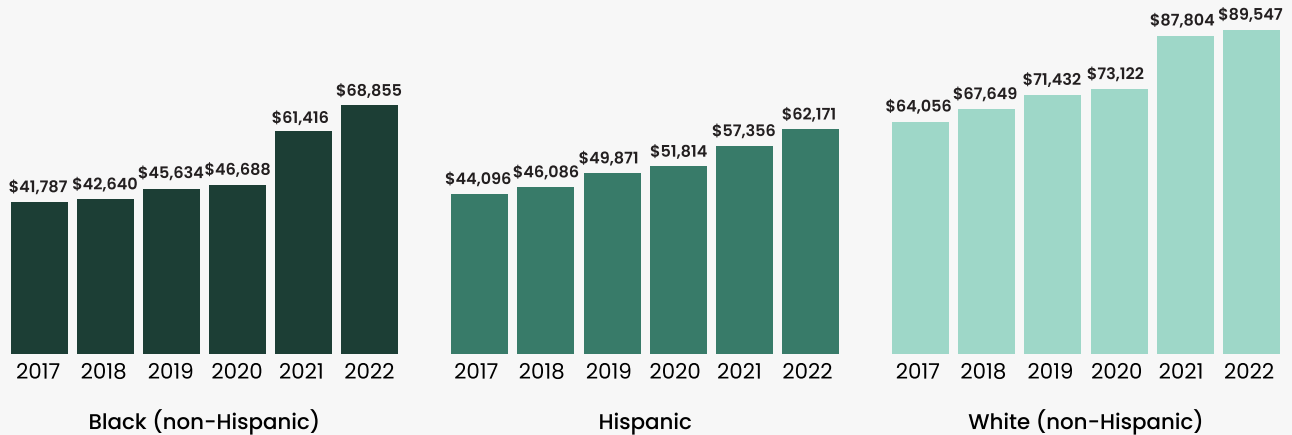
Collier County had an increase in median household income from 2017 to 2022. Starting in 2017, the median household income was \$62,407, rising to \$80,815 in 2022.

FIGURE 6: MEDIAN HOUSEHOLD INCOME OF FLORIDA COMPARED TO COLLIER COUNTY



Citation: U.S. Census Bureau. (2021). INCOME IN THE PAST 12 MONTHS (IN 2021 INFLATION-ADJUSTED DOLLARS). American Community Survey, ACS 1-Year Estimates Subject Tables, Table S1901. <https://data.census.gov/table/ACSST1Y2021.S1901?q=Collier+County+median+household+income>.

While the median household income increased for non-Hispanic Black residents of Collier County, this group is still far behind their non-Hispanic White counterparts in median household income. The median household income for Black residents of Collier County rose from \$41,787 in 2017 to \$68,855 in 2022, whereas for White residents, it rose from \$64,056 in 2017 to \$89,547 in 2022. A similar picture is seen when comparing the median household income for White, non-Hispanic residents to Hispanic residents. From 2017 to 2022, the median household income for Hispanic residents rose from \$44,096 to \$62,171.²²

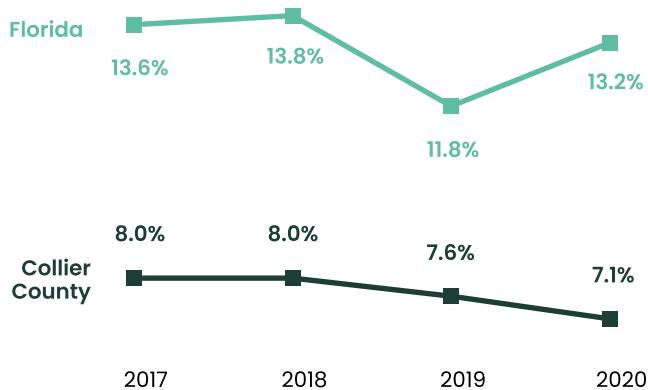
FIGURE 7: MEDIAN HOUSEHOLD INCOME IN COLLIER COUNTY BY RACE/ETHNICITY

**Note: this represents the median household income for each race/ethnicity from 2017 to 2022.*

Citation: U.S. Census Bureau. "MEDIAN INCOME IN THE PAST 12 MONTHS (IN 2021 INFLATION-ADJUSTED DOLLARS)." American Community Survey, ACS 1-Year Estimates Subject Tables, Table S1903, 2021, <https://data.census.gov/table/ACSST1Y2021.S1903?q=Collier+County+median+household+income+by+race>.

Nutrition Assistance Programs

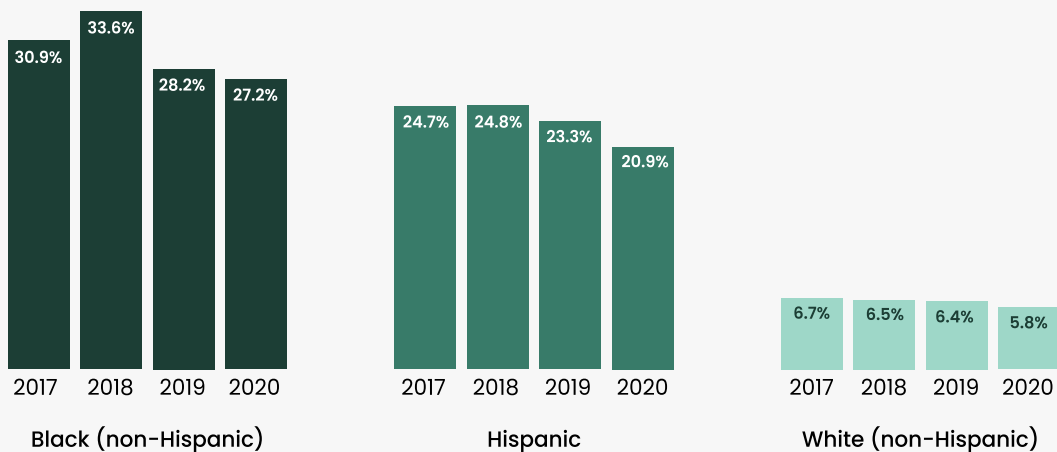
Collier County had a notable decrease in households receiving food stamps/SNAP (Supplemental Nutrition Assistance Program) benefits from 2018 to 2020, with 8.0% of households receiving these benefits in 2017 compared to 7.1% in 2020.

FIGURE 8: HOUSEHOLDS RECEIVING SNAP/FOOD STAMPS IN FLORIDA COMPARED TO COLLIER COUNTY

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

This story, much like median household income, is slightly different when race and ethnicity are considered. From 2017 to 2020, White residents receiving food stamps/SNAP benefits in Collier County remained low, decreasing from 6.7% in 2017 to 5.8% in 2020 (see Figure 9 on next page). On the other hand, in 2017, 30.9% of Black residents of Collier County received food stamps/SNAP benefits, which only decreased to 27.2% by 2020. Similarly, the number of White, non-Hispanic residents receiving food stamps/SNAP benefits was quite low, decreasing from 3.1% in 2017 to 2.7% in 2020. For Hispanic residents, however, the rate remained high despite decreasing from 24.7% in 2017 to 20.9% in 2020.²³



FIGURE 9: COLLIER COUNTY POPULATION RECEIVING SNAP/FOOD STAMPS BY RACE/ETHNICITY

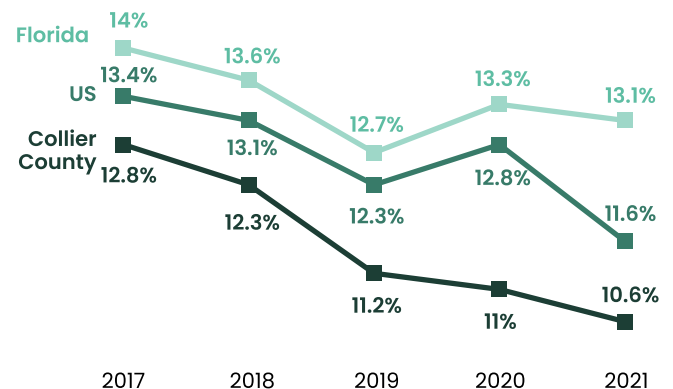
**Note: this represents the percentage of the population of each race/ethnicity that were receiving SNAP/food stamp benefits each year from 2017 to 2020.*

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

While the use of SNAP seems to be decreasing, this could be caused by multiple factors, including the Universal Feeding Program during COVID, which allowed all school children free breakfast and lunch at school, and the large federal cost of living increase in 2023, which may have rendered some families suddenly ineligible for SNAP services.

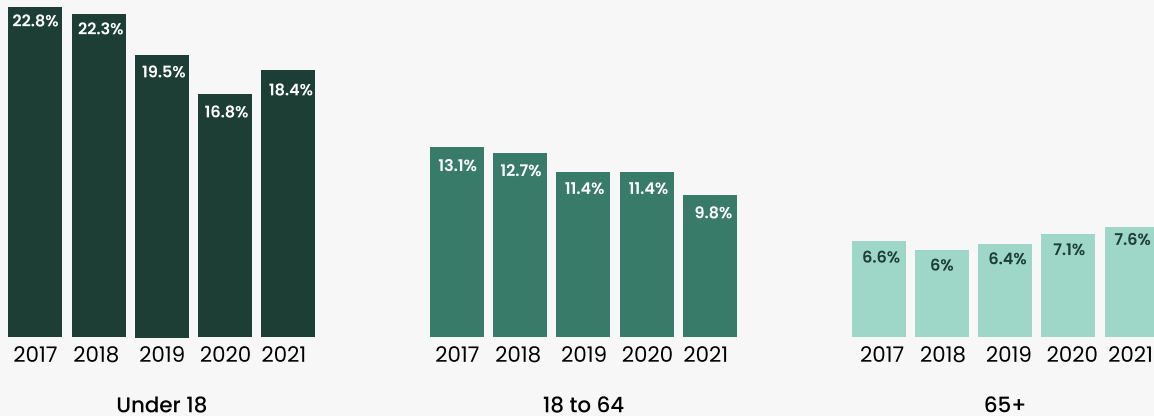
Poverty Levels

The poverty rate in Florida has decreased from 2017 to 2021, going from 14.0% to 13.1%, 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. Due to the low poverty rate, Collier County ranks number ten for the lowest poverty rate amongst Florida counties.

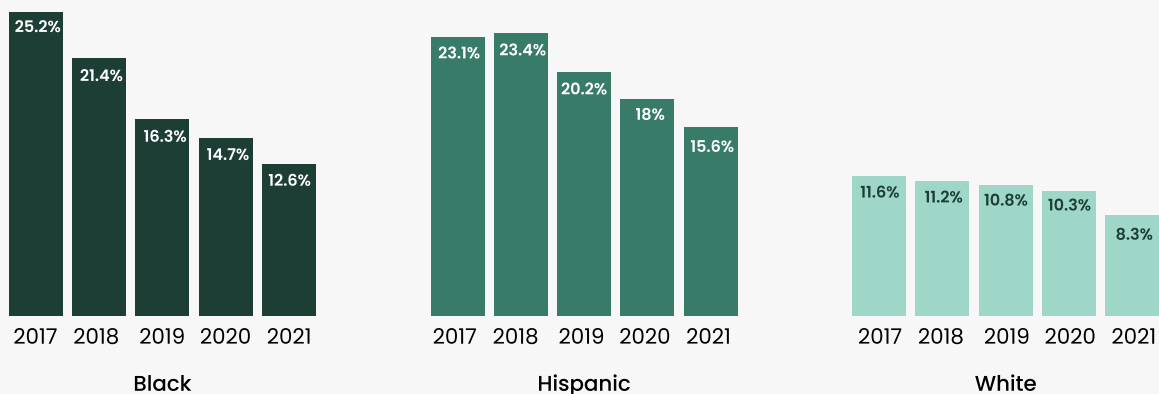
FIGURE 10: POVERTY RATES FOR US, FLORIDA, AND COLLIER COUNTY*

Citation: Florida Health Charts (2021). Community and Social Economic Factors 2017-2021. <https://www.flhealthcharts.gov/ChartsReports/rdPage.aspx?rdReport=ChartsProfiles.CommunityCensusProfile&pcid=001>

When disaggregated by age, those under 18 years old in Collier County experience the highest poverty rates. While this number also decreased, the poverty level for those under 18 in Collier County in 2021 was 18.4% compared to 9.8% for 18-64 years and 7.6% for those 65 and over.

FIGURE 11: COLLIER COUNTY POVERTY RATES BY AGE

Citation: U.S. Census Bureau. (2022). Poverty Status in the Past 12 Months. American Community Survey, ACS 1-Year Estimates Subject Tables, Table S1701. <https://data.census.gov/table/ACSST1Y2022.S1701?q=Collier+County+poverty+rates>.

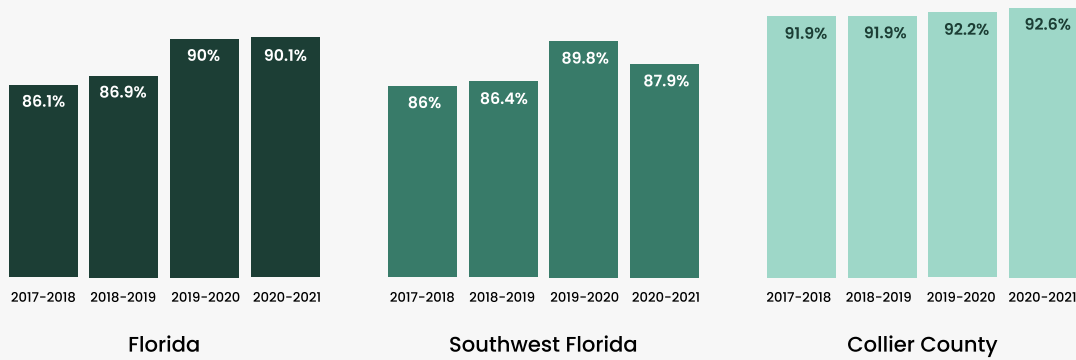
FIGURE 12: COLLIER COUNTY POVERTY RATES BY RACE/ETHNICITY

**Note: this represents the poverty rate percentage for each race/ethnicity listed for each year from 2017 to 2021.*

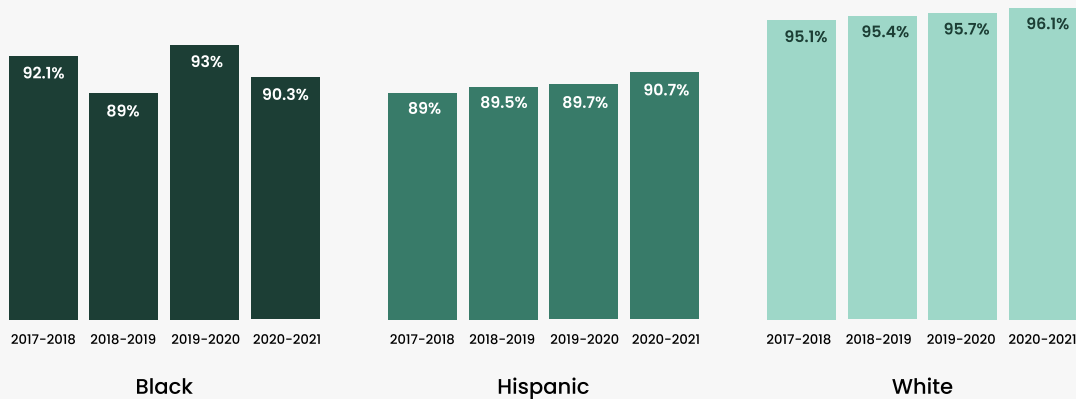
Citation: U.S. Census Bureau. (2022). Poverty Status in the Past 12 Months. American Community Survey, ACS 1-Year Estimates Subject Tables, Table S1701. Retrieved October 3, 2023, from <https://data.census.gov/table/ACSST1Y2022.S1701?q=Collier+County+poverty+rates>

The poverty level for White residents compared to Black residents in Collier County tells an interesting story. Both levels have decreased, with the poverty levels for White residents staying relatively low and the poverty levels for Black residents decreasing until almost even with White residents. In 2017, the poverty level for White Collier County residents was 11.6%, compared to 25.2% for Black residents. In 2021, the poverty level for White residents was 8.3% compared to 12.6% for Black residents. Hispanic residents

did not experience quite as much of a decrease in poverty levels as Black residents. For White, non-Hispanic residents, poverty levels remained relatively low, increasing slightly 7.3% in 2017 to 7.8% in 2021. Hispanic residents saw a decrease from 23.1% in 2017 to 15.6% in 2021. While this is a significant decrease in the poverty level for Hispanic residents, Black residents' poverty level saw a dramatic decrease to the point that in 2020, it was near the poverty level for White residents.²⁴

FIGURE 13: HIGH SCHOOL GRADUATION RATES

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

FIGURE 14: COLLIER COUNTY HIGH SCHOOL GRADUATION RATES BY RACE/ETHNICITY

**Note: this represents the graduation rates in percentage for each race/ethnicity listed from 2017-2018 to 2020-2021.*

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

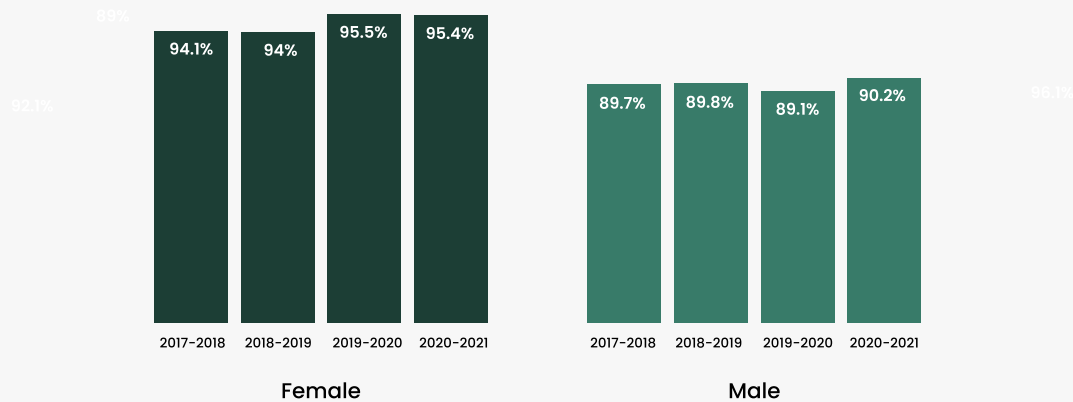
Education

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 (Figure 13). Collier County saw an increase in high school graduation rates from 2017 to 2021, with 88.0% of students graduating in 2017 compared to 91.5% graduating in 2022.²⁵

Southwest Florida saw increased graduation rates for Black (83.0% to 86.7%), Hispanic (82.7%

to 85.9%), and White (89.4% to 90.0%) students from 2017 to 2021, with a slight decrease in the 2020-2021 school year from the year before. Meanwhile, Collier County saw high graduation rates across all three demographics, with 96.1% of White students, 90.7% of Hispanic students, and 90.3% of Black students graduating high school in the 2020-2021 school year (Figure 14).²⁶

In Southwest Florida, the female population had higher graduation rates from the 2017-2018 (88.7%) year through the 2020-2021 (91.2%) year, compared to males from 2017-2018 (83.4%) to 2020-2021 (84.9%) (see Figure 15 on next page).

FIGURE 15: COLLIER COUNTY GRADUATION RATES BY GENDER

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

The graduation rates by gender in Collier County were similar but higher for both females and males. The graduation rate for the female population from 2017-2018 to 2020-2021 increased from 94.1% to 95.4%, with the male graduation rate for the same years being 89.8% to 90.2%.²⁷

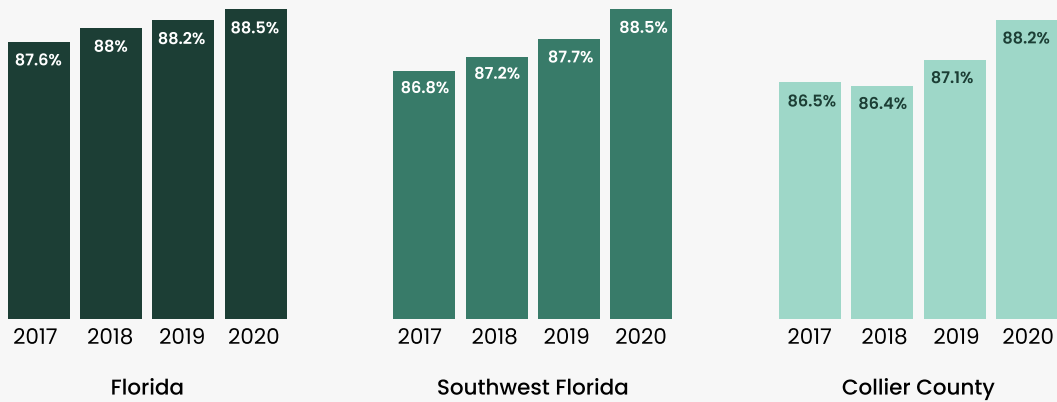
Southwest Florida and Florida state both saw increases in SAT participation rates from 2017 to 2021. In Southwest Florida, rates increased from 45.0% in 2016 to 62.5% in 2021. In the state of Florida, the rates increased from 68.1% in 2017 to 77.0% in 2021.²⁸ Both Southwest Florida and the state of Florida reached the peak of SAT rates in 2019, with a 92.2% participation rate for Florida and a 67.3% rate for Southwest Florida. Participation rates for the SAT rose from 2017 to 2020 in Collier County, with 52.0% of students participating in 2017 and 76.4% participating in 2020. Collier County did see a decrease in overall scores for the SAT Math portion, with an average score of 501 in 2016 and 468 in 2021. While Collier County also saw a decrease in scores on the Evidence-Based Reading and Writing portion of the SAT, the decrease was smaller than Math at an average of 530 in 2017 to 506 in 2021.²⁹

Collier County, from 2017 to 2020, had high rates of educational attainment for those aged 25 and over (see Figure 16 on next page). For adults aged

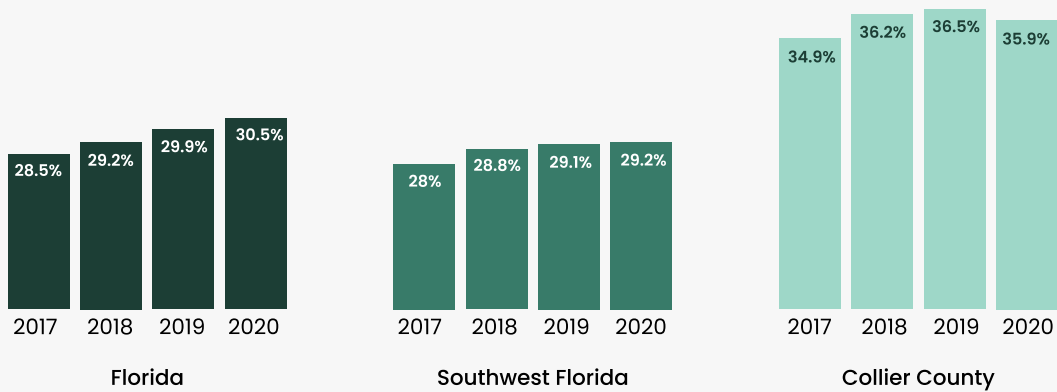
25 to 64, 35% had a bachelor's degree or higher in 2021, higher than the state average of 31.5% (see Figure 17 on next page). In 2021, 89.9% of Collier County residents had a high school diploma or higher, while 40.3% had a bachelor's degree or higher.³⁰

In 2021, 8.4% of Collier County residents had an associate degree.³¹ Collier County's rates of educational attainment, particularly with bachelor's degrees or higher, are still high compared to Southwest Florida and the state of Florida. In 2020, 88.5% of Southwest Florida residents had a high school diploma or higher, while 29.2% had a bachelor's degree or higher. For the state of Florida, in 2020, 88.5% had a high school diploma or higher, while 30.5% had a bachelor's degree or higher.



FIGURE 16: POPULATION OF 25 AND OVER WITH A HIGH SCHOOL DIPLOMA OR HIGHER

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

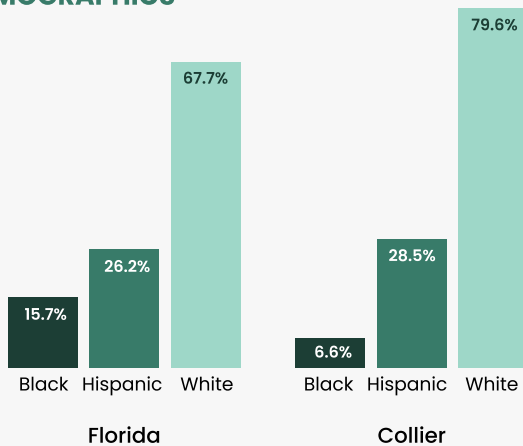
FIGURE 17: POPULATION OF 25 AND OVER WITH A BACHELOR'S DEGREE OR HIGHER

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

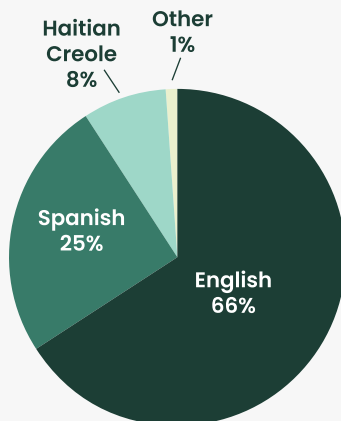
Race, Ethnicity, and Language

On average, Collier County has a larger White population than the state of Florida, with 76.9% of Collier County's population identifying as White compared to 67.7% for the state of Florida as of 2021 (see Figure 18 on next page). Collier County also has a higher number of Hispanic residents (28.5%) compared to the state (26.2%) as of 2021.³² As of 2021, Collier County has a lower number of Black residents (6.6%) compared to the state (15.7%).

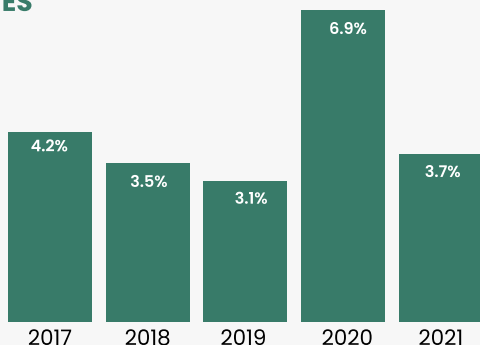
Regarding language, 13.3% of Collier County residents aged five and older speak English "less than very well (see Figure 19 on next page)."³³ Of Collier County residents aged five and older, 33.6% have a language other than English spoken at home.³⁴ Thirty-four percent of the population of Collier County speaks a language other than English, with 25% speaking Spanish, 8% speaking Haitian Creole, and the last 1% speaking other languages.³⁵

FIGURE 18: RACIAL AND ETHNIC POPULATION DEMOGRAPHICS

Citation: Florida Health Charts. (2021). Community Social and Economic Factors.

FIGURE 19: LANGUAGES SPOKEN IN COLLIER COUNTY

Citation: Florida Health Collier County and NCH Health System. (October, 2022). Community Health Assessment: Age-Friendly Action Plan.

FIGURE 20: COLLIER COUNTY UNEMPLOYMENT RATES

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

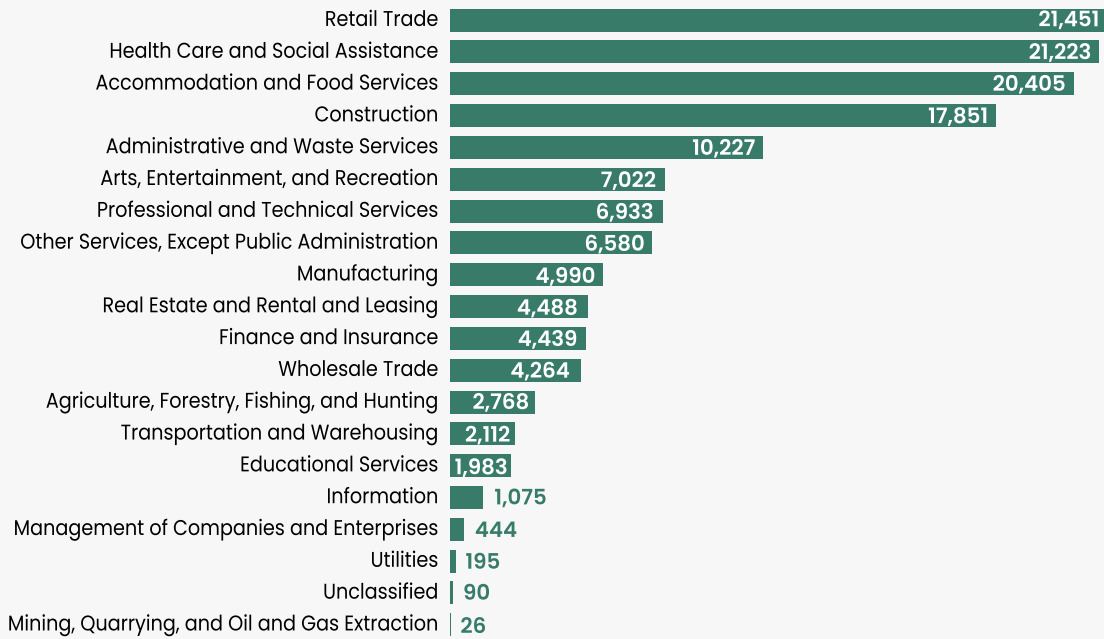
Socioeconomic Characteristics

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.³⁶ Collier County's gross regional product increased by 2.8% from 2015 to 2020 and is projected to increase by another 4.2% by 2025.³⁷ There is a large income gap between the richest and poorest in Collier County, with almost 35% making over \$100,000 per year compared to 36.5% making \$50,000 or less per year. The top 1% in Collier County make 90.1 times more than the bottom 99%, with the average top 1% income being \$5,590,210 and the average bottom 99% income being \$62,053.³⁸

Collier County has seen a decrease in unemployment rates from 2017 (4.2%) to 2021 (3.7%).

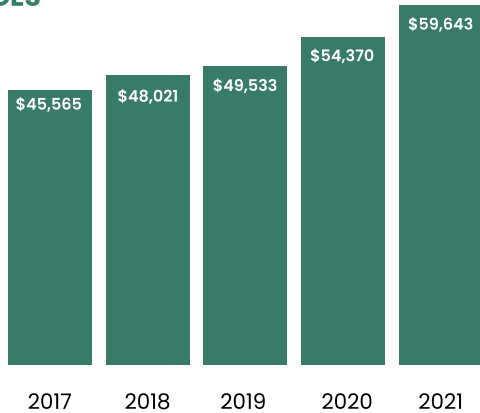
Having said this, it is important to note there was an increase in unemployment rates in 2020 from the COVID-19 pandemic, where unemployment rates across the country were higher than average (Figure 20). In 2020, Collier County's unemployment rate was higher than previously but still fairly low compared to other states and the US rate at 6.9%.³⁹

Retail trade, followed by health care and social assistance and accommodation and food services, were the three largest employment industries in Collier County in 2021. These are also some of the lowest-paid industries in the county.⁴⁰

FIGURE 21: COLLIER COUNTY EMPLOYMENT BY INDUSTRY

Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

From 2017 to 2021, Collier County saw rising employment wages, starting at an average of \$45,565 in 2017 and increasing to \$59,643 in 2021. Of all the coastal counties in Southwest Florida, Collier County had the highest average annual wages, higher even than Southwest Florida, with an average of \$53,274.⁴¹

FIGURE 22: COLLIER COUNTY AVERAGE ANNUAL WAGES

Citation: Regional Economic Research Institute and Florida Gulf Coast University. (2022). Collier Fast Facts Community Profile.

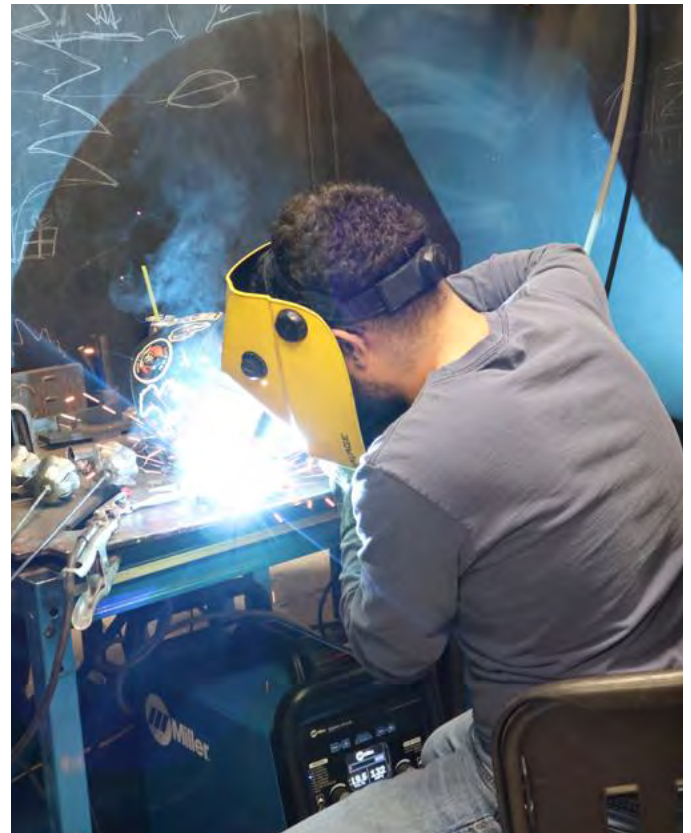


Photo courtesy of Lorenzo Walker Technical College.

FINDINGS BY DOMAIN



The following sections describe the findings from the BCAS, focus groups, and secondary data related to each of the priority domains.

BCAS Sample Demographics

The final BCAS sample, which included responses where at least half the survey was completed, comprised 6,072 respondents. Table 2 shows displays sample demographics.

Just over a third of respondents were male, and the sample leaned toward older participants, which aligns with the large proportion of retired adults in Collier County. Notably, the most selected age group was the oldest (aged 70 or above). Most respondents had a college degree or higher, and survey respondents reported household incomes that were, on average, above national figures. The most selected household income category was \$100,000 to \$149,999, which was also the median value.

TABLE 2: 2022–2023 BCAS SAMPLE DEMOGRAPHICS

		2022–2023 Number	2022–2023 Percent	2017–2018	
Gender	Female	4,085	67.3%	2181	66%
	Male	1,830	30.1%	1120	33%
	Self-Identify	157	2.6%	No data	No data
Age	18–30	510	8.4%	376	11%
	31–40	773	12.7%	52	16%
	41–50	845	13.9%	631	19%
	51–60	1,042	17.2%	632	19%
	61–69	1,159	19.1%	61+	
	70+	1,743	28.7%	1103	34%
Race/Ethnicity	White	4,506	74.2%	2211	69%
	Hispanic/Latino/a	1,020	16.8%	709	22%
	Black/African American	166	2.7%	160	5%
	Asian	65	1.1%	No data	No data
	Non-Hispanic Caribbean Islander	54	0.9%	No data	No data
	American Indian or Alaskan Native	47	0.7%	22	1%
	Native Hawaiian or Pacific Islander	16	0.2%	No data	No data
Household Income	<\$5,000	157	2.6%	86	3%
	\$5,000–\$14,999	151	2.5%	164	6%
	\$15,000–\$24,999	258	4.2%	284	10%
	\$25,000–\$49,999	764	12.6%	437	16%
	\$50,000–\$74,999	848	14.0%	432	15%
	\$75,000–\$99,999	774	12.7%	447	16%
	\$100,000–\$149,999	1,110	18.2%	\$100,000+	
	\$150,000–\$199,999	602	9.9%	968	34%
	\$200,000–\$249,999	405	6.7%		
	\$250,000+	901	14.8%		
Education	Eighth grade or less	121	2.0%	103	3%
	Some high school	122	2.0%	128	4%
	High school or equivalent	387	6.4%	373	13%
	Vocational or technical training	175	2.9%	105	4%
	Some college	915	15.1%	505	17%
	College graduate	2,417	39.8%	1046	35%
	Advanced degree	1,935	31.9%	719	24%
Employment	Employed	3,532	58.2%	No data	No data
	Not employed	2,540	41.8%	No data	No data

Nearly three-quarters of respondents identified as White, and 16.6% identified as Hispanic, while representation of other races and ethnic groups was substantially lower.

Regarding employment, 58.2% of survey respondents reported working, and 41.8% reported that they were not. Of those who said they were not working, 2,211 (87.0%) indicated that they were retired, 93 (3.7%) said that they were disabled, 71 (2.8%) lacked adequate childcare, and 51 (2.0%) lacked adequate transportation. Just 102 (4.0%) said they were not working because they could not find suitable employment. The fact that being retired accounted for most of those who reported being unemployed is in keeping with the large population of retired persons in Collier County.

BCAS participants were also asked how long they had lived in Collier County. The most selected response was ten years or more (3,939 respondents, or 64.9%), followed by four to nine years (1,296 respondents, or 21.3%), and one to three years (622 respondents, or 10.2%) and less than one year (215 respondents or 3.5%). Over three-quarters of respondents reported being homeowners (4,677 respondents, or 77.0%), and most were year-round residents of Collier County (5,124 respondents, or 84.4%).

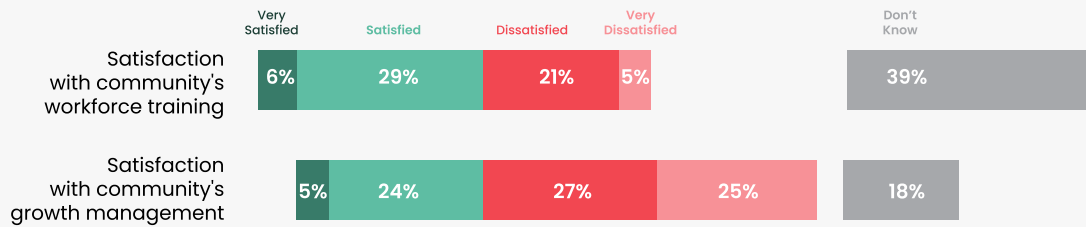
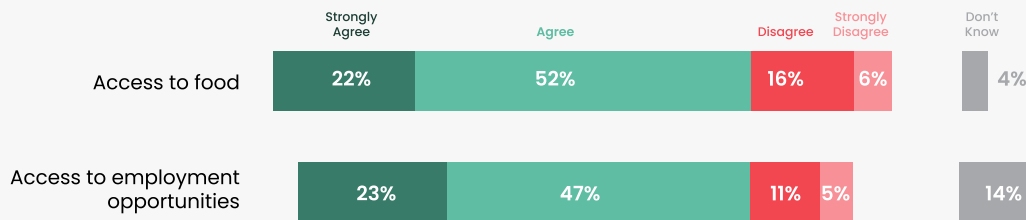
A substantial majority were covered by medical insurance, with 5,655 (93.3%) reporting that they had coverage, although this still left 408 (6.7%) without any health insurance. Of those with insurance, 3,455 (62.1%) reported having private insurance, whereas 2,109 (37.9%) had public insurance such as Medicare or Medicaid.

Economic Opportunity & Employment

Survey: Collier County Opinions

The BCAS asked respondents how strongly they agreed that community residents had access to employment opportunities. Responses were largely positive, with nearly half selecting agree (47%) and almost a quarter selecting strongly agree (23%). This left about 16% either disagreeing or strongly disagreeing that employment opportunities were available in their community. Another 14% said that they were unsure. When asked to select from a list the three most important issues for Collier County, 32% chose bringing better-paying jobs to the area, making this the fourth most selected issue.

Growth management was one of the areas where BCAS respondents expressed the most dissatisfaction. Growth management specifically refers to government policies that aim to accommodate, not prevent, growth within a particular location. This typically means developing policies that address types of, locations for, and timelines of new developments.⁴² More than half said that they were either dissatisfied or very dissatisfied with growth management in their community (25% were very dissatisfied and 27% dissatisfied). An additional 18% were unsure. This left just 24% saying they were satisfied and 5% saying they were very satisfied with growth management in their neighborhood. Managing growth and development was one of the most prioritized issues in the community survey, with 63% of respondents selecting this as a key issue for Collier County. This was second only to housing costs.

FIGURE 23: SATISFACTION WITH ECONOMIC OPPORTUNITY AND EMPLOYMENT**FIGURE 24: ACCESS TO ECONOMIC OPPORTUNITY AND EMPLOYMENT**

Satisfaction with workforce training was a bit lower than satisfaction with PreK-12 and post-high school education (Figure 23). Despite this, among those who felt able to share an opinion, most selected response was satisfied (29%). Relatively few respondents expressed that they were very satisfied (6%), while close to a quarter were either dissatisfied (21%) or very dissatisfied (5%) with workforce training in their community. The BCAS also asked respondents to select from a list what they felt were the three most pressing issues for leaders in Collier County. From the list, 24% chose public education and workforce training.

Access to food represents another critical facet of the economic environment. Access to food is not always equitably located across neighborhoods. The survey found that 22% of residents disagreed (16%) or strongly disagreed (6%) that there was access to food in their neighborhood (Figure 24). While 52% agreed and 22% strongly agreed, the finding that over one in five respondents felt that there was difficulty in accessing food points to regions in the county where food access is an important consideration.

Focus Group Reactions

Commercial and Small Businesses

Although more difficult for community leaders to address, some focus group participants noted wanting greater accessibility to commercial businesses within their communities. Some participants mentioned wanting more opportunities or events to engage youth in the community, such as through events at skating rinks, movie theaters, community centers, and opportunities to volunteer and give back to the community. Participants explained that they are concerned that young people have to leave the county to find things to do, and in the past, this was not the case.

Other 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.

"I'll say the government makes it nearly impossible to start your own. I tried to start a home health type business and then I wanted to do even just no medical, just doing laundry, shopping, that kind of thing. You have to have \$150,000 in a bank account. You have to have two RNs that are hired working there, even if you don't provide medical services, which is very expensive, they make it nearly impossible."

– 34120/34142 (Ave Maria) Focus Group Participant

Barriers to Economic Opportunities and Employment

Many participants mentioned long or far commutes to their jobs as a barrier to economic opportunities and employment. These participants said their commutes are exacerbated by traffic when they already have to travel far distances to their jobs, as many employees do not live close to where they work due to a lack of affordable housing.

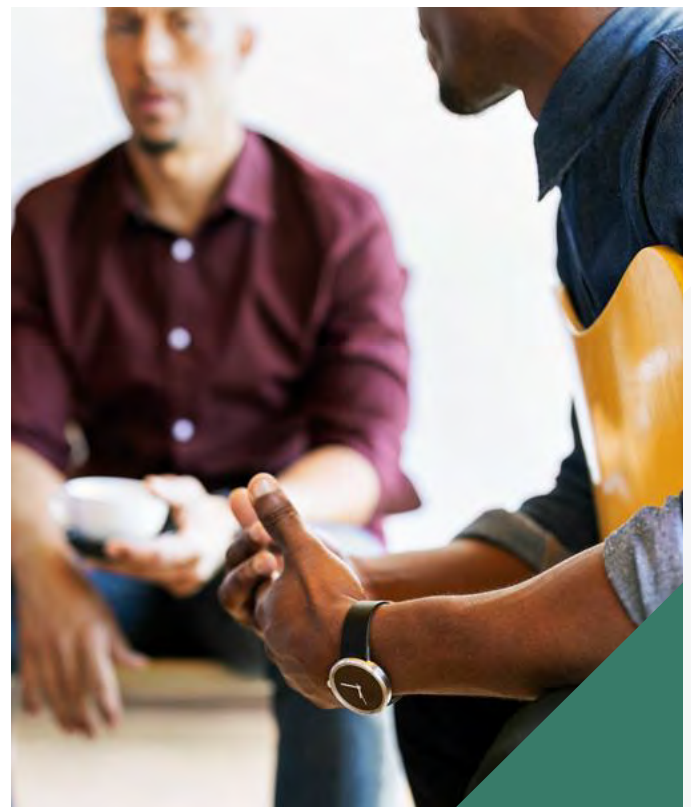
"I have a small company, and I have to hire people that can't afford to live in Naples. So, they live north Estero, one guy's Cape Coral, so their commute is gridlock on I-75. It's gridlock on Immokalee Road to get to the office. And it's a big issue. It means that I'm constantly battling, getting them to work long enough because they have sometimes an hour, hour and a half commute just to get home."

– Infrastructure and Transportation Focus Group Expert

Many focus group participants also mentioned that a lack of childcare options leads to fewer people being able to stay in or enter the workforce. More specifically, participants referenced childcare options either closing during the COVID-19 pandemic or being unaffordable when available. Both of these points present challenges to growing the workforce in Collier County. Childcare challenges will be discussed further in the Education domain.

"Going along with affordable housing is also affordable childcare, because a lot of the employees, you got to make a choice of working or staying home and watching the kids, and that's a challenge. If they had affordable childcare, then more people would actually be in the workforce."

– 34145 Focus Group Participant



Cost of Living, Wages, and Food Insecurity

Cost of living and inflation were frequently mentioned by focus group participants as challenges to economic growth and security in their communities. Regarding inflation, one participant from the 34103/34105 focus group discussed an increase in the number of individuals at the Salvation Army requesting resources. Other participants spoke about difficulties affording food with current inflation prices, explaining that they or people they know could not buy food individually or provide for their families.

“And we have people calling [our organization] and telling us, men crying and saying, ‘I’ve been able to take care of my family for years. I have always been able to take care of my family. And with the cost of all of the things going up down here, not only the cost of housing but also the cost of food, the complete inflation, and the cost of insurance, etc., I can’t feed my family anymore. I’ve never had to ask for help and now I’m having to ask for help to feed my family.’”

– 34113 Focus Group Participant

Some focus group participants also mentioned that they view stagnant wages as an economic challenge, particularly that they feel wages are not sufficient for the cost of living in their communities for workers such as bus drivers and cafeteria workers. This finding is in alignment with secondary data that shows retail services and food/accommodation services were the most common workforce industries in Southwest Florida in 2021 but also the lowest paid.⁴³

“They don’t talk about bus drivers getting raises. They don’t talk about cafeteria workers getting raises. They don’t talk about aides getting paid. The people who are actually doing the hardcore work for the district, other than the teachers, they don’t talk about that.”

– 34102 (River Park) Focus Group Participant

Stagnant wages can fall along racial lines as well, with Asian and White Collier County residents making a median household income of \$80,000 year in 2020 but Black/African American residents having a median household income of less than \$50,000 per year. Furthermore, 55% of Black/African American households in Collier County are below the ALICE Survival Budget threshold (\$75,200 per year).

Many focus group participants also mentioned food insecurity as an economic issue they face, especially among the middle class, and notably during the COVID-19 pandemic. More specifically, participants shared how they believe resources are distributed inequitably or ineffectively so that the most vulnerable populations do not receive them. Participants also noted needing more affordable food services.

“Particularly during the pandemic. There was a huge increase in food insecurity. And it’s not just the seniors... It’s come into the middle class and there’s a huge need.”

–34103/34105 Focus Group Participants



Photo courtesy of Lorenzo Walker Technical College.

Secondary data provides additional insight into food security within the county. In 2019, 37,250 people in Collier County were food insecure. Food banks in the county saw an increase of almost 20,000 people seeking services from 2021 to 2022.⁴⁴ Thirty-one percent (31%) of food-insecure individuals were above the SNAP/Nutrition Program threshold of 200% of the Federal Poverty Level, meaning they were ineligible to receive benefits. Sixty-five percent (65%) of Collier County children from preschool through middle school were eligible for free or reduced lunch, and 22% of children who were food insecure were ineligible for federal nutrition programs.⁴⁵

Workforce Development

Although BCAS responses were largely positive regarding access to employment opportunities, with about a quarter of survey respondents selecting education and workforce training as key priorities for the community, reactions in focus groups somewhat differed. Participants mentioned that although people are moving to Collier County, they feel they are not contributing much to the economy if these are seasonal or retired residents. The need to invest more

in workforce development was specifically mentioned by focus group participants, including job opportunities for young people, technical and vocational skills programs, and restaurant workers. Some focus group participants also discussed the need to increase access to career mentorship and assistance programs to contribute to workforce development in their community. They explained that these programs expose and get young people excited about different careers through direct experience. Participants also shared how they believed these programs would help people from all backgrounds, ages, and skillsets learn about potential jobs that could be a good fit for them.

“The young people that are here need to have the training to do the jobs that are available, and some of that [is] technical training. There’s a big gap.”

–34109/34110 Focus Group Participant

Community Differences and Disparities

In the BCAS, attitudes regarding access to employment opportunities varied substantially by zip code. Attitudes were weakest in 34139 (57% disagree or strongly disagree), corresponding to Everglades City. Across the county, Black/African American, Hispanic, and non-Hispanic Caribbean respondents were significantly more likely to disagree that there was access to employment opportunities. The same was true for lower-income residents.

There was also variability by zip code in whether BCAS respondents flagged bringing better-paying jobs to the area as a critical priority for leaders in the county. The area where bringing better-paying jobs to the area was most prioritized was zip code 34142, corresponding to Immokalee, where 61% of respondents expressed that this was a critical priority. Lower-income respondents were significantly more likely to choose this as a priority, as were non-White community members.

Satisfaction with growth management also varied by zip code. Overall, 62% expressed that they were dissatisfied or very dissatisfied with growth management in zip code 34102, or the City of Naples. The areas where residents were most likely to select growth management as a key issue for community leaders were the City of Naples (85%) and Marco Island (76%).

The proportion of BCAS respondents who were dissatisfied or very dissatisfied with workforce training was highest in the zip code 34139 (61%), which corresponds to Everglades City. In the same area, more than a third of survey respondents disagreed or strongly disagreed that there was access to food in their community. Across the county, lower-income and Hispanic respondents were more likely to disagree that there was access to food.

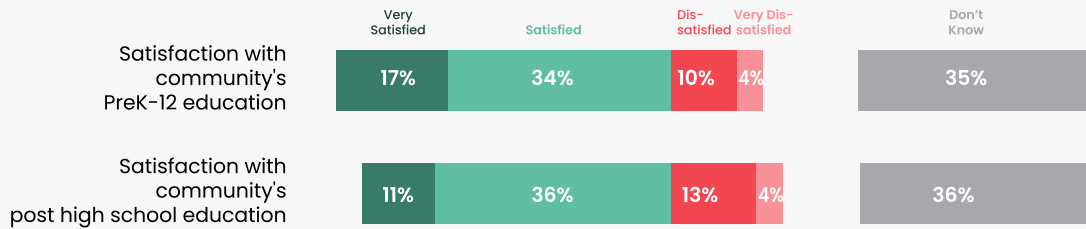
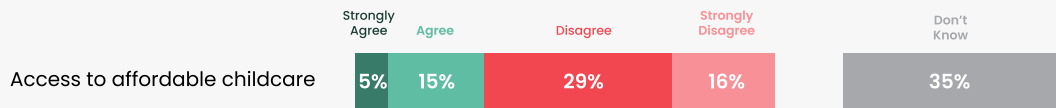
Education

Survey: Collier County Opinions

The BCAS also asked community members how satisfied they were with PreK-12 education in their community (see Figure 25 on next page). Overall, about a third (34%) said they were satisfied, and 17% said they were very satisfied. While responses leaned favorably, this left 10% who were dissatisfied and 4% who were very dissatisfied with PreK-12 education. Just over a third of respondents (35%) said they didn't know. When considering only respondents who had children under the age of 18 at home, respondents were much less likely to report that they did not know (10%). This segment continued to show overall strong satisfaction with PreK-12 education, with 23% feeling very satisfied and 47% satisfied.



Photo courtesy of Collier County Public Schools.

FIGURE 25: SATISFACTION WITH EDUCATION**FIGURE 26: ACCESS TO EDUCATION**

Satisfaction with post-high school education was largely in line with PreK-12 education. A substantial proportion of respondents responded that they didn't know (36%). Otherwise, responses leaned favorably, with 36% saying they were satisfied and 11% very satisfied with post-high school education in their community. This left 13% expressing that they were dissatisfied and 4% feeling very dissatisfied in this area.

The survey also asked whether respondents felt there was access to affordable childcare in their community (Figure 26). Here, responses leaned negative, with 16% strongly disagreeing, 29% disagreeing, 15% agreeing, and 5% agreeing. Over a third of respondents said that they did not know, reflecting the large number of households without children. When considering only those households that have a child under the age of 18, attitudes remained negative, with a smaller proportion reporting that they did not know. In this case, 24% strongly disagreed, 36% disagreed, 20% agreed, and 7% strongly agreed.

The BCAS asked respondents to select from a list what they felt were the three most pressing issues for leaders in Collier County. Here, only 19% indicated that they prioritized childcare for young children and summer/after-school programs for youth.

This was the least selected option, although it is worth noting that many residents in Collier County are older adults without children in the household. A slightly higher proportion (24%) of BCAS respondents selected public education and workforce training as a key priority.

When considering only those survey respondents who reported having a child under the age of 18 living in their household, the topics of education, childcare, and academic enrichment received greater priority. The percentage who indicated childcare and summer/after-school programs as critical priorities for the community increased to 32%, while those who selected public education and workforce training increased slightly to 27% when considering only those with children at home.



Photo courtesy of the Guadalupe Center.

Focus Group Reactions

Early Childcare

Although childcare was one of the least selected pressing issues among survey respondents, focus group participants discussed their frustration with waitlists for childcare. Participants specifically mentioned needing childcare to maintain their jobs, but they felt that demand for such care was high, and availability was low in their communities. They explained that this results in parents being placed on waitlists for months and even years. The Early Learning Coalition of Collier County had 126 childcare providers in 2022, serving just over 4,000 children between school readiness and voluntary preschool programs. The income eligibility threshold for ELC Collier County is 150% of the Federal Poverty Line (\$45,000 per year).⁴⁶ Participants mentioned their hopes that Collier County officials would work on expanding access to early childcare and reducing the prevalence of parents standing by on waitlists.

“I had to wait almost a year and a half until finally I got lucky with [organization name] when they had a spot for me. But it was off-chance. Now we’ve been waiting for months, and months, trying to get in.

–34102 (River Park)

After-School and Vocational Programming

Like childcare, survey respondents did not select after-school programming as one of the most pressing issues in their community. Despite this, focus group participants mentioned that there are organizations already doing a great job at offering after-school programming in their communities. Participants 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.

“It’s important to have it not just at that elementary school level because they are less independent. They need it at that middle and high school level because they need a safe place to go. Where when parents are working, middle school students’ maturity levels vary significantly. You can have some that are very mature, you can have some that are very immature. But just because of their age, doesn’t mean that they still don’t need that place for parents who are working later to be. Or even high school if they don’t have that transportation. The older they get, some of the worst things that they can get into. So, all the more reason to have it at all grade levels.”

– Education Focus Group Expert

Despite recognizing their importance, participants considered experts in Education shared that they believe these programs experience staffing difficulties that impact availability to the community. Similar to childcare, the prevalence of waitlists for after-school programs was also discussed.

In addition to after-school programs, focus group participants mentioned that they believe there is a need for increased vocational education and training in Collier County to fill employment gaps in trades. Participants explained that the education system, parents, and the community have more generally pointed students away from pursuing vocational careers. Not only did participants discuss the importance of prioritizing vocational education, but some also emphasized that if these programs are to be offered, they feel transportation services and support should be provided to ease commuting barriers these individuals may experience.

Additionally, participants, including experts in Education, shared their belief that more can be done, specifically in dedicating resources to helping young people figure out their career path, whether that path includes post-secondary education or not.

“What I think we can improve upon, and we do a great job at this already, is helping that kid to figure out what is next. And if we know that they may not ever have a chance to be a secondary student, whether it’s college, maybe it is a trade, do we have an opportunity for a kid to go to a trade younger than post-high school? Are we utilizing all of our resources to the best of their ability?”

- Education Focus Group Expert

Although participants asked for more vocational opportunities in schools, it is important to note that Collier County does offer career and technical education (CTE) at high schools through Career Academies. Collier County Public Schools (CCPS) explains that these academies focus on career preparation and go beyond traditional career education to integrate academic and technical curricula, raise student ambitions, increase career options, and provide a meaningful learning context for both college and career-bound students.⁴⁷ Career Academies are offered at eight public high schools in Collier County, and students can register for dual enrollment technical courses through either Lorenzo Walker Technical College or Immokalee Technical College along with Florida Southwestern State College. These Career Academies offer varied programs, including engineering, finance and entrepreneurship, health sciences, hospitality and tourism, and information technology. Dual enrollment classes are offered in programs such as air conditioning/HVAC, dental assisting, pharmacy technician, and legal administrative to acquire expertise in specific trades.⁴⁸

Commuting and Transportation to Educational Institutions

Some focus group participants mentioned challenges presented by the school bus system. Participants unhappy with the current bus system explained that due to bus driver shortages, teachers lose the ability to take students on field trips.

“But there is a shortage of bus drivers (...) In this whole area, we cannot take a lot of kids on field trips that they normally go on. So, we normally go to Rookery Bay, which is a really good experience for any kids in our area, but they won’t let us go there now because you have to be back by 1:30. So we don’t have time to go there. And those are good experiences, especially if the kids aren’t from families that take them to the beach or to coastal areas.”

- 34120/34142 (Ave Maria) Focus Group Participant

Regarding higher education, some focus group participants mentioned challenges their children face commuting to campuses due to a lack of public transportation.

“The closest (campus)... is an hour and a half from here. So, my son (who) just graduated from high school... How is he going to get there? ... There is no transportation here... Even if he gets a scholarship, how is he going to get there?”

- 34142 (Immokalee) Spanish Language Focus Group Participant

Student Pressure, Support, and Politicization

Focus group participants discussed the effects of COVID-19 on students. Specifically, they shared that they feel coursework can be too challenging after being away from the classroom due to the pandemic. According to participants, such as education experts, students have been under immense pressure to catch up, and are generally expected to have knowledge of complex topics, such as numbers and letters, before beginning kindergarten.

"That they walk in the door, they're five years old, some of them are still four because they have until August 31st. I have two little children that were four starting kindergarten. And their expectation is they have to read by the end of the year. And they have never been to school before. They don't know the difference between a letter and a number...."

- Education Focus Group Expert

Focus group participants also mentioned needing more English Language Learner (ELL) support in classrooms. Experts in Education described how there has been a recent increase in students who speak many different languages, but they do not believe schools have sufficient access to ELL resources to support and engage with these students.

Participants, particularly experts in Education, also mentioned profound concern with politicizing education in both Collier County and the state of Florida more broadly. They voiced that limitations on topics educators can teach and resources educators are able to use are moving the education system in the wrong direction, and this politicization has drastically increased over the past decade.

"But not only in the community, in the state. When someone's driving in they hear media specialists are in danger of being prosecuted if a wrong book is checked out to a student for a teacher, for anyone, it'd be like prosecution, a felony... I think we're going in the wrong direction, not as a community, but as a state in the way we're treating our educators."

- Education Focus Group Expert

Focus group participants also mentioned that they believe there were many homeless parents and children in the public school system, which impacts the ability of children to plant roots at school due to moving around often. One participant specifically mentioned that they teach high school and see children often moving between relatives and friends during the school year, citing this as a real problem in achieving educational stability for students in these situations.



Teachers

Focus group participants discussed concerns with recruiting quality educators in Collier County, explaining that they believe the lack of teacher benefits, including lack of salary increases, are barriers to attracting teachers of better quality. Participants specifically mentioned how failing to compensate teachers adequately has led to teacher shortages, as many teachers cannot afford to live in the county. Participants also mentioned how these challenges transfer to hiring and maintaining subject specialists in county schools.

“Right now, even pensions aren’t keeping [teachers], retirements aren’t keeping [teachers], they’re leaving. And there’s not enough people coming in to fill those gaps. And at some point, there just aren’t enough people in Naples to fill the amount of teaching and academic positions that we need to be able to support students.”

– Education Focus Group Expert

“I think our teachers are carrying a heavy burden. And I think that, yes, salary and cost of living and all of those things are important, but also being valued and appreciated and elevated as critically important contributors in this community. I think is equally important.”

– Education Focus Group Expert

Participants also spoke about the societal pressures teachers face today, including teaching certain requirements quickly, not having enough time to take bathroom breaks, and generally losing their autonomy in the classroom.



“There isn’t a possibility to meet the standards in a day with five-year-olds that are expected. And if you took the minutes that are required, you can’t breathe, you can’t move, they can’t go to the bathroom. So, it’s goes down to just that, having been teaching a long time, that respect and autonomy is gone. And everything, it needs to be exactly as this. And it doesn’t respect your understanding of children, what they need. And that’s constantly being scrutinized.”

– Education Focus Group Expert

Community Differences and Disparities

Through the BCAS, opinions varied by zip code regarding affordable childcare. The zip code where most respondents disagreed or strongly disagreed that there was access to such services was 34139 (82%), or Everglades City. Across the county, residents aged 31 to 40 were significantly more likely to disagree that there was access to affordable childcare, which is worth noting given that this age group is more apt to have children at home.

Satisfaction with PreK-12 education was relatively strong across the county. The zip codes where survey respondents were most likely to be dissatisfied or very dissatisfied with PreK-12 education were 34117 (21%) and 34142 (20%), which are rural areas to the east of the county and Immokalee. While satisfaction with post-high school education was also relatively strong across the county, dissatisfaction exceeded 25% in 34139 (38%) and 34142 (31%), corresponding to Everglades City and Immokalee.

The zip codes where BCAS respondents were most likely to say that childcare and summer/after-school programs should be a community priority were 34138 (38%) and 34140 (33%). Associated neighborhoods include Chokoloskee and Goodland toward the south of the county. Less than a third of survey respondents indicated this as a priority in other zip codes. While public education and workforce training were among the less selected priority areas, there were some zip codes where respondents selected this to a greater degree. In particular, the zip codes where respondents were most likely to choose education as a critical priority were 34140 (33%), 34105 (33%), and 34142 (28%). Associated neighborhoods include Goodland, Grey Oaks and surrounding areas, and Immokalee.

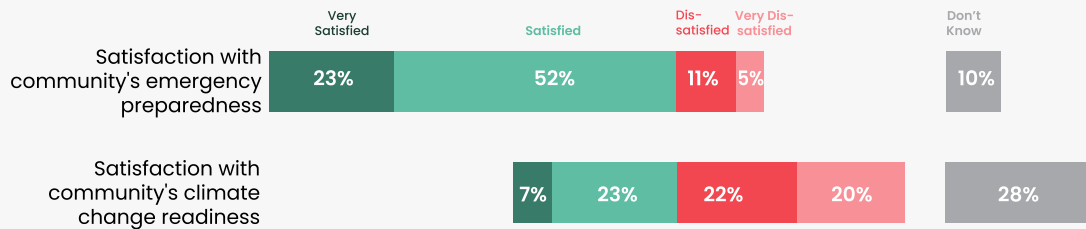
Environment

Survey: Collier County Opinions

The BCAS also explored attitudes about climate change readiness and the environment. It is worth noting that the survey was conducted just following Hurricane Ian, which caused widespread damage in Collier County. This context may have affected average attitudes regarding climate and disaster readiness. Despite this, attitudes were fairly mixed on a question addressing satisfaction with climate change readiness, although leaning toward dissatisfaction and uncertainty. The most selected response was “unsure,” at 28%. Just 7% strongly agreed that they were satisfied with climate change readiness, and 23% agreed. Conversely, 22% disagreed that they were satisfied with climate change readiness, and 20% strongly disagreed. 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.



Photo courtesy of YMCA of Collier County.

FIGURE 27: SATISFACTION WITH THE ENVIRONMENT**FIGURE 28: ENVIRONMENTAL ACCESS**

The Southwest Florida Climate Survey was conducted in 2022, and the results were similar to that of the community survey. Of note, almost 80% of Southwest Florida residents thought local, state, and federal governments should do more to protect natural coastlines and wetlands as they provide natural protection against climate change and sea level rise. As well, 56% of respondents wanted local governments to address climate challenges, including actions addressing the root causes and alleviating impacts (Figure 27).⁴⁹

Satisfaction with emergency preparedness was relatively strong. Across the county, 23% were very satisfied, 52% were satisfied, 11% were dissatisfied, and 5% were very dissatisfied. About 10% indicated that they did not know. The community survey also asked about access to parks and clean beaches, where satisfaction was overall favorable. Over a third (38%) strongly agreed, and nearly half (48%) agreed that residents in their neighborhood had access to these amenities (Figure 28). Just 7% disagreed, and 5% strongly disagreed.

Focus Group Reactions

Climate Change and Environmental Education

Participants in the Environment focus group mentioned wanting more opportunities, especially for seasonal residents, to learn more about environmental education and awareness, including recycling procedures, preserving water quality, red tide, mangroves, and climate change.

"One of the things that would be really prudent is to help with a better education. That can be with mangroves, that can be with water quality issues, what causes it. Everyone talks about, 'Oh. We have to preserve our water quality,' but people don't understand what that means. What's the translation? What can I do? They don't understand what those steps are. They just think, 'Oh. Well, we're only here for four months out of the year. We don't need to do anything,' or, 'Our footprint isn't that big of a deal.'"

– Environment Focus Group Expert

Emergencies and Natural Disasters

Participants discussed the need to dedicate more resources to resilient coastal infrastructure, as participants recognized the inevitability of environmental disasters continuing to impact their community in the future. Participants suggested needing to raise the elevation of existing structures (e.g., seawalls) along the coast to counteract the impacts of erosion. Suggested examples of infrastructure investments that could contribute to this resiliency that are more nature-based than raising the elevation of existing structures included oyster bed projects, mangrove improvements, and dune restoration.

"If we really want to protect our coast and maintain our coast, there probably have to be some physical structure investments that get made over time, particularly in the inland areas that could be acceptable. We are going to have to raise the elevation of structures along the coastline despite the fact that the current mantra, at least within the city of Naples is, 'Height is bad.' But things are going to have to get higher."

**-Environment Focus Group
Expert**

Concerns about Preserving Beach Tourism

Participants also mentioned their concerns with preserving beach tourism in the community. They cited the prevalence of Harmful Algae Blooms (HAB) and red tide in the water that results from intense storm events and leaking chemicals into waterways as examples of contributing factors.

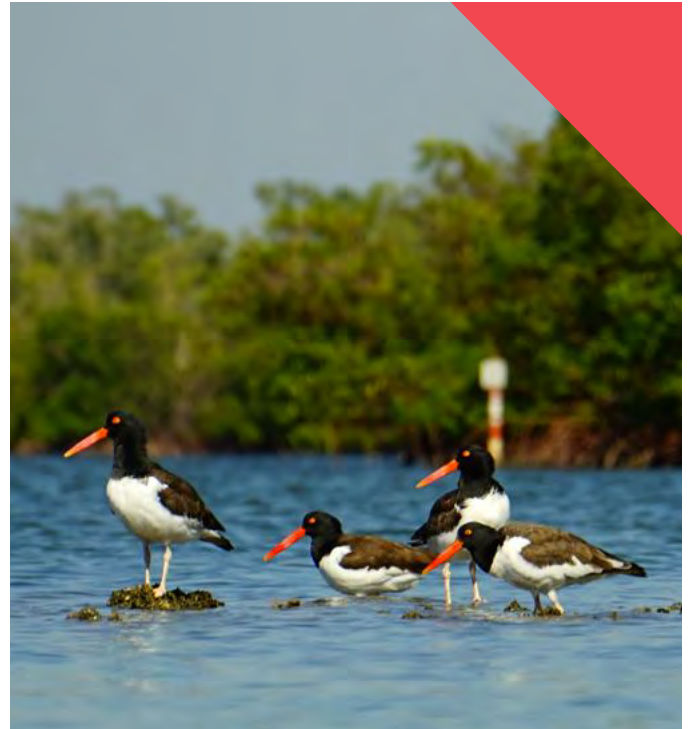


Photo courtesy of the Conservancy of Southwest Florida.

"We're based off tourism. We're going to kill tourism if we can't have our beaches. So, if we're having blue-green algae, if we're having red tide, if we're having fish kills every day... All of coastal Collier County is essentially under a health alert right now for red tide. And if you have any underlying respiratory illness, it's going to affect you more so than what it would a healthier person. But it's still affects you. And if you keep doing that and having these runoffs from... from your fertilizers and chemicals and things like that that go into the Gulf of Mexico."

**-34109/34110 Focus Group
Participant**

Community Environmental Challenges

When asked about major environmental challenges facing their communities, participants cited the following concerns: water quality, the challenge of HAB, the increased duration and frequency of red tide and its impacts on human health and the economy, availability of quality fresh water supplies, and erosion.

When speaking to water quantity and quality, participants expressed concern about water shortages because of new buildings and construction in the community. They also described how hurricanes and pollution negatively impact water quality in the community, and in the future, population growth projections in Collier County will continue to exacerbate water quality issues. The 2017 Estuary Report card reaffirms participants' concerns, showing that Naples Bay had a D- rating for water quality, Rookery Bay had a C average, and Ten Thousand Islands had a C+. ⁵⁰

"I think that we have a serious, down the road, water issue. The growth projections for Collier County are absolutely mind-blowing ... When you're not going to be able to turn the tap on and get decent water or any water."

-34103/34105 Focus Group Participant

Finally, participants spoke about their concerns for wildlife preservation doing more to preserve local wildlife which is a motivation for tourism to the area. One particular concern is the perception that new construction is being prioritized over the preservation of land for wildlife.

"They keep building and building. It's just nonstop on our street. In the past two years we've had just about every single lot bought up now and there's building being on there and there's nothing set aside for the wildlife. The wildlife is what brings people into this area."

-34120/34142 (Ave Maria) Focus Group Participant

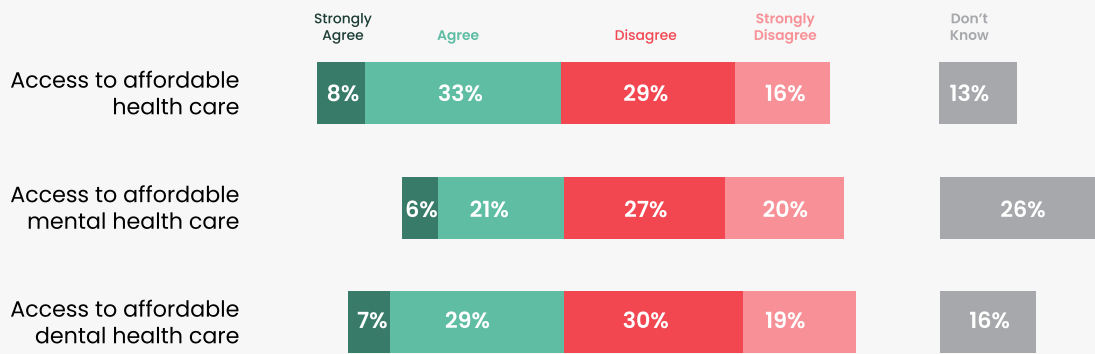
Community Differences and Disparities

The proportion of respondents who said they were dissatisfied or very dissatisfied with climate change readiness was fairly consistent across the county. The only zip code where more than 50% of respondents said they were dissatisfied was 34108, corresponding to Pelican Bay and coastal areas north of Central Naples. More than half of survey respondents felt that the environment should be a top priority for county leaders in 34102 (64%), 34145 (59%), 34103 (55%), and 34108 (54%). This corresponds to central Naples, coastal areas north of downtown, and Marco Island.

Satisfaction with emergency preparedness was lowest in 34142 (34% dissatisfied or very dissatisfied), 34139 (34%), and 34117 (23%). These zip codes correspond to Immokalee, Everglades City, and rural Eastern Collier. Lower-income and non-White groups were significantly less satisfied with emergency preparedness in their communities.

While attitudes toward access to parks and clean beaches were largely positive across the county, residents of 34142, or Immokalee, were substantially more likely to disagree or strongly disagree (38% total) that they had access to these amenities. Non-White survey respondents (Black/African American and Hispanic) were also significantly less likely to strongly agree that people in their community had access to parks and clean beaches.

FIGURE 29: ACCESS TO HEALTHCARE AND MENTAL HEALTH SERVICES



Health Care & Mental Health Services

Survey: Collier County Opinions

Although BCAS responses were mixed, more respondents expressed disagreement that residents in their neighborhood have access to affordable health care. Across the county, 16% strongly disagreed, 29% disagreed, 33% agreed, and 8% strongly agreed that they had access to these services (Figure 29). The BCAS also asked respondents whether they felt that residents in their neighborhood had access to affordable mental health care. Nearly half of the respondents disagreed that such services were accessible (20% strongly disagree, 27% disagree). Just over a quarter agreed that there was access to affordable mental health services (21% agree, 6% strongly agree), leaving 26% who were unsure.

Responses on the BCAS also leaned negative regarding access to affordable dental care. Nearly a fifth (19%) of respondents strongly disagreed, and a bit less than a third (30%) disagreed, that residents in their neighborhood had access to affordable dental care. Some respondents felt unsure (16%), leaving about a third who agreed that local residents had access to affordable dental care (29% agreed, 7% strongly disagreed).

When asked what three areas leaders in Collier County should prioritize, just 22% selected access to health and dental care (including primary care, specialty services, etc.). Similarly, 23% chose mental health services. Access to health and dental care and mental health services were among the less selected priority areas. This finding is important to consider in conjunction with the above-noted attitudes regarding insufficient access to affordable health care services.

Focus Group Reactions

Access, Availability, and Affordability

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. Some participants described having to travel outside the county to see a doctor because doctors in town do not accept their policy.





“Besides the clinic, a lot of the places here in town won’t take the insurance... that the employers here in town provide. We either have to go to Naples or Fort Myers, or a provider that would take us, instead of paying \$200 of our pocket for an appointment.”

– 34142 (Immokalee) Spanish Language Focus Group Participant

Participants also shared how they experience difficulties filling prescriptions, as at some big-name pharmacies, there are not enough staff members to keep them open.

Participants also discussed challenges with the locations of these services, including the lack of a hospital close by for emergencies and childbirth, as well as transportation challenges to accessing health care services more generally.

A participant from the 34120/34142 (Ave Maria) focus group specifically explained the stress they experienced giving birth to four children in the community, describing the fear of not knowing if they would make it to the hospital in time, and even describing knowing people who have had to give birth in cars or have their children delivered by firefighters.

Focus group participants also mentioned experiencing issues with ambulances in their community. In fact, in the first quarter of 2023, there has been a 5% increase in ambulance responses in Collier County as well as an 8% increase in transports.⁵¹ To address this issue, participants, including health care experts, suggested building a standalone hospital facility in the community for ambulances to transport residents in an emergency.

Regarding transportation, participants explained that public transportation was inadequate to get people to appointments. An expert participant from the Mental Health focus group explained that they incorporated ride share business modes into their organization’s budget as a way to address this transportation challenge.

“We incorporated [ride share] Business into our model and it’s a line item in our budget now... We do rely on paratransit, and we do take advantage of that. But certainly, if we need to transport somebody to David Lawrence Center for an appointment or whatever the situation is, the bus system just is not adequate to get them there in a timely manner... I would say it’s around the \$10,000 mark we are willing to spend on transportation just to get people to their appointments, wherever that might be.”

– Mental Health Focus Group Expert

Focus group participants also mentioned challenges with provider availability, including not enough doctors for permanent residents, non-permanent during the season, and a limited number of specialist doctors practicing in the community. Participants specifically shared their experiences with doctors in Collier County not accepting new patients, and often, non-permanent residents taking up the available appointments. Additionally, they felt there were not enough doctors in the area, resulting in Collier County residents having to travel many miles to see a doctor and visit the emergency room. Secondary data shows that Southwest Florida is experiencing a serious doctor shortfall, with much of the region lacking hundreds, if not thousands, of doctors compared to the need.⁵² Participants also mentioned that they perceive health care quality as sporadic, given the seasonality of the community population.

“With the health care issue, residents cannot get into physicians for weeks, sometimes months, because all of the people who have recently moved in, or seasonal people, take up the appointments.”

– 34113 Focus Group Participant

Focus group participants also mentioned cost barriers to accessing health care. More specifically, they described being unable to afford dental care and prescriptions and discussed that health care was not affordable in their community. Secondary data reaffirms cost barriers community experience to access health care, as in 2019, 42% of adults with a median income of under \$50,000 per year could not see a doctor due to costs.⁵³

Many focus group participants also spoke about the general challenges they and other Collier County residents they knew faced in terms of health care, including physicians unable to find housing in the community and the prevalence of concierge medical services rather than primary care doctors.

Health Care Programs and Facilities

Focus group participants also offered various program recommendations to improve health care quality in the community, including developing home visit programs, paramedic training programs that partner with hospitals and mental health organizations, and implementing proactive, preventative wellness practices in the community through the Blue Zones Project to promote healthier lifestyles. Drawing from studies conducted in the world’s Blue Zones, the Blue Zones Project works with communities across the United States to instill healthier lifestyles through community transformation programs. The Blue Zones are identified areas where people live much longer than in other parts of the world on average. These programs specifically work to improve city streets, schools, and public space, and along the way, lower health care costs and create sustainable, healthy lifestyles.⁵⁴

"I would also add that I've talked to a group of physicians who have been brainstorming about ways we could have home visit with people discharged from the hospital, checking on them at home instead of having them to go follow up with their outpatient primary care. People don't go to their outpatient primary care. If we could take care of them in their homes and try to minimize them coming back to the hospital, they would be all for that."

- Health Care Focus Group Expert

Senior Population

Focus group participants mentioned specific health challenges faced by the senior population in Collier County, including a lack of affordable retirement and nursing home options and limited mental health care services for this population.

"I think it's our seniors... Especially with the ones who have issues, mental health, Alzheimer's and stuff. Where do they go?"

- 34120/34142 (Ave Maria) Focus Group Participant

A participant in the 34114/34117 focus group notably shared their perception that there seems to be a retirement facility on every corner, but only the wealthy can afford them. Addressing challenges experienced by the county's senior population is especially important because thirty-six percent (36%) of Collier County's population is over the age of 65. Of this population over the age of 65 in the county, approximately 6.4% are living in poverty, and 25% has some type of disability.

From 2010 to 2040, it is estimated that the population of adults aged 65+ in Collier County will increase by 96%.⁵⁵ Additionally, 32% of Collier County seniors live below the ALICE Survival Budget threshold for older adults (\$26,680 annually for one older adult, \$45,564 for two older adults).⁵⁶

"It's one of those things where we have to do something, because if we're blessed enough to have the amazing honor to grow old, because not everyone gets that privilege, we deserve to have somewhere to go, to be looked after in a way that we can afford it and that our dignity is preserved and that we actually enjoy those last few years."

- 34114/34117 Focus Group Participant

Mental Health Care Challenges

Focus group participants spoke about many mental health care challenges faced by community members. They emphasized that adults, especially parents, need greater access to mental health services.

In 2020, the rate of deaths per suicide in Collier County was at its highest: 15.8 per 100,000 compared to 13.1. In 2021, the rate in Collier County was slightly lower: 14.9 per 100,000 compared to 13.8 in Florida. This was the highest number of suicides in Collier County ever reported. Adult, White (non-Hispanic) men are most likely to die from suicide in Collier County, as well as people aged 45-64 and 85+.⁵⁷ This data coincides with what many participants mentioned in focus groups regarding challenges to accessing mental health care/treatment.

Participants explained that there are not many facility options in the community for adults seeking mental health care/treatment besides David Lawrence Center, a facility often cited in the focus groups. Participants particularly expressed that it is not sustainable for the David Lawrence Center to serve as one of the only mental health institutions in the county. Secondary data provides further context to this particular challenge, as the population of Collier County grew by 23% from 2012 to 2020, but the number of services provided to residents by David Lawrence Centers increased by 114% during that same time period.⁵⁸

“With the population growth that we’re having, our mental health services are not able to keep up... Certainly the expansion of the David Lawrence Center intake facilities is one step in the right direction. But only having David Lawrence Center as our main mental health institution cannot keep up with the needs of the community as it is... There’s a wait list for essentially everything that you could imagine.”

– 34103/34105 Focus Group Participant

Some participants mentioned the lack of residential rehabilitation facilities as a gap within the county. They also shared that, due to the lack of these facilities, some residents with mental health issues have been in and out of jail instead of receiving the help that they need from a professional care facility.

“I know about David Lawrence, and there’s maybe a few other facilities, and there’s jail. I’ve witnessed people with mental problems go to jail for crimes, and they’re out back on the street and then they go to jail and then they’re back out on the street. It’s just a revolving door. Where do they go? There are no facilities, there’s no connection here to send them anywhere where they would help.”

– 34114/34117 Focus Group Participant

Focus group participants also shared their opinions on the Florida Mental Health Act, also known as the Baker Act. The Baker Act offers services to those in mental health crises and establishes criteria for those who may receive care. In 2021, 1,743 residents received Baker Act petitions, an 11% increase from 2020. Additionally, there was an increase of 500 children annually who received involuntary mental health examinations from 2009 to 2019.⁵⁹ Participants, specifically mental health care professionals, mentioned challenges they experience because of the Baker Act, including feeling like they are taking away patients’ rights because of social determinants of health.

Focus group participants also mentioned challenges with stigma and attitudes toward mental health or receiving mental health care. Participants explained that mental health care is heavily stigmatized in the community and needs to be prioritized greater. Some participants, including Mental Health experts, also discussed needing to educate the community on mental illness to break this stigma, as sometimes help is required to overcome mental illness due to no fault of an individual’s own.



"We need to de-stigmatize mental health issues... and educate people that it is a hereditary thing. It's not always a choice thing. It's not a pull yourself up your own bootstraps. It's an illness. And I think people get confused also about the substance abuse issue and how that's a choice. And that has been shown to be a medical illness too. And you have to have the right services."

– Mental Health Focus Group Expert

Finally, focus group participants discussed needing to further prioritize youth mental health services. Participants specifically mentioned the need for greater access to youth counseling services, as the existing care facilities have long waitlists. Regarding particular mental health issues youth face in Collier County, participants discussed youth needing more socialization post-pandemic and less screen time.

Substance Use and Abuse

Regarding substance use and abuse, focus group participants mentioned that they believe there is more need in the community for resources dedicated to these issues than there are actual resources.

"The amount of need for people that need mental health assistance and sober and drug addiction resources. There's more people than there are resources."

– 34112 Focus Group Participant

In particular, experts in the Health Care focus group spoke about a recent increase in heroin usage in the community. They also explained the impacts of substance abuse on residents in the community, including the inability to sustain employment, increased homelessness, and inability to provide for their families. Regarding existing resources, the impact of St. Matthew's House was mentioned, as it is both a homeless shelter and an addiction program.

Finally, focus group participants, including Health Care experts, called for increased awareness and reduced stigma regarding substance use and abuse. Participants also spoke to needing more comprehensive substance abuse education and awareness programs in the county, such as how to distribute Narcan when someone overdoses, as well as peer support programs for a collaborative approach to recovery.

"We now have a Narcan distribution at the health department, where if anyone walks in, we give them a kit. And so, that also adds to training of individuals. So, there's resources that need to go into educating people that this is even happening and be aware."

– Health Care Focus Group Expert

FIGURE 30: ACCESS TO HOUSING

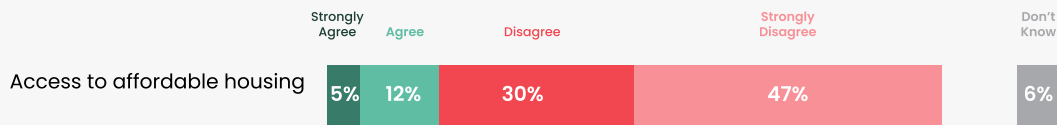
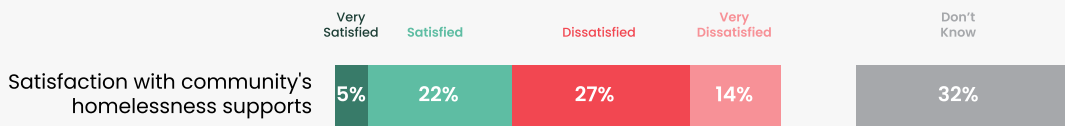


FIGURE 31: SATISFACTION RELATED TO HOUSING



Community Differences and Disparities

Attitudes regarding access to affordable health care varied by zip code in the BCAS. Zip codes where more than 70% of survey respondents disagreed or strongly disagreed that there was access to affordable health care were 34139 (74%) and 34138 (71%). These correspond to neighborhoods in Everglades City and Chokoloskee. In the same areas, more than 70% of respondents disagreed that there was access to affordable mental health care, and more than 75% disagreed that there was access to affordable dental care. Respondents from eastern portions of the county, including Immokalee and Golden Gate Estates, were also more likely to disagree that there was access to these services.

Survey respondents with children under the age of 18 were more concerned about the availability of affordable health care than those without. Within this group, 22% strongly disagreed and 34% disagreed that there was access to affordable health care in their community.

By a substantial margin, the zip codes where respondents were most likely to say that dental and health care access should be a priority for leaders in Collier County were 34138 (62%) and 34139 (43%). This corresponds to the same neighborhoods around Chokoloskee and Everglades City. About a third of respondents

prioritized dental and health care access in 34116, 34142, 34140, and 34145. Associated areas include Golden Gate City, Immokalee, Goodland, and Marco Island. This was selected as a priority by less than a quarter of respondents in other areas. Lower-income and Hispanic residents were both significantly more likely to choose dental and health care access as a critical priority for the community.

Housing

Survey: Collier County Opinions

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, nearly half (47%) strongly disagreed, and nearly a third (30%) disagreed (Figure 30). About 6% expressed that they were unsure, leaving just 12% agreeing and 5% strongly agreeing that residents had access to affordable housing. Similarly, when asked to select the top three priorities for leaders in Collier County, housing costs were the most cited issue on the community survey. Of all respondents, 65% selected controlling housing costs as a key priority.

The BCAS also asked about satisfaction with homelessness supports. Satisfaction was fairly mixed, leaning toward dissatisfaction. Nearly a third of respondents (32%) reported feeling unsure how they felt about these services. Otherwise, 14% strongly disagreed, 27% disagreed, 22% agreed, and 5% strongly agreed that they were satisfied with homelessness supports in their community. It is worth noting that this finding likely reflects attitudes about the quantity and availability of services rather than the quality of existing programs.



Photo courtesy of Habitat for Humanity of Collier County.

Focus Group Reactions

Housing Affordability

Many focus group participants mentioned challenges with housing affordability in Collier County. They discussed issues with affordable housing programs, such as how people that could once afford to buy homes here could not today, reiterating that cost is a significant barrier to homeownership. Participants further explained that they believe additional homeowner/disaster insurance cost exacerbates this challenge.

"25 years ago when I came to Naples, I had a lot of options, and we barely can afford to live in the house... There's no way we could live in our neighborhood now, it's not even close."

– 34103/34105 Focus Group Participant

Additionally, rising rent costs in the community were discussed extensively by participants, especially the impact of rising rent costs on working and young people.

"If they don't have career jobs that are paying six figures or close to it, they can't afford to live here... I was fortunate enough when I bought my house, I could get in there. Right now, young people cannot afford to buy a house in Collier County."

–34102 (River Park) Focus Group Participant

A full 1/3 of Collier County residents are cost-burdened for housing.⁶⁰ Participants mentioned that one-bedroom apartments in the county could be listed at over \$2,000 per month, as an example. Additionally, participants explained that they have a lack of trust in landlords because the rent increases are not sustainable, forcing tenants to relocate. Finally, participants discussed the increased prevalence of young people, especially recent college graduates, living at home with their families because they cannot afford to live on their own in the county.

"It's disheartening. My daughter just graduated from college. She got a full-time job but she's going to be living with me... She can't find a place to rent. A one-bedroom place is \$2,000 and that's if you can find it."

– Teachers/First Responders/Young Professionals Focus Group Participant

Housing Availability

Challenges pertaining to housing availability were also mentioned by some focus group participants. Participants discussed how the prevalence of short-term rental properties has diminished housing availability for county residents.

“We’re having a huge problem in our neighborhood with [short-term rentals] taking over the rentals. We had two houses that used to be rentals that are now [short-term rentals] and there’s no regulation on that end.”

**– Teachers/First Responders/
Young Professionals Focus Group
Participant**

Participants also discussed challenges they have faced pertaining to landlords and real estate investors in the community. In particular, participants discussed concerns about gentrification development and displacement of residents due to landlords selling properties to wealthy investors. In doing so, they expressed concern over how these actions are negatively impacting the community.

“One of the other side effects of the housing problem is gentrification, developers just coming in and making an investment. It’s no longer a home or anything like that. It’s just investment.”

– 34112 Focus Group Participant

Homelessness

Focus group participants discussed the issues of homelessness and homelessness intervention within the community. Homelessness has increased in Collier County due to the housing crisis and rent prices. As of January 2023, 703 people in Collier County were experiencing homelessness,

and more than half were unsheltered compared to 462 people experiencing homelessness in 2022.⁶¹ Twenty-one percent (21%) of individuals experiencing homelessness in Collier County in 2020 suffered from a severe mental health issue, while 26% were chronic substance users.⁶²

Workforce Housing

As mentioned earlier in the Economic Opportunity and Employment section, focus group participants explained that they feel unaffordable housing is driving out the workforce in the community. This is a common theme that arose throughout different priority domains and across focus groups. For example, it was mentioned in the Special Populations focus group that participants feel caretakers of people with disabilities cannot afford housing close to where they work.

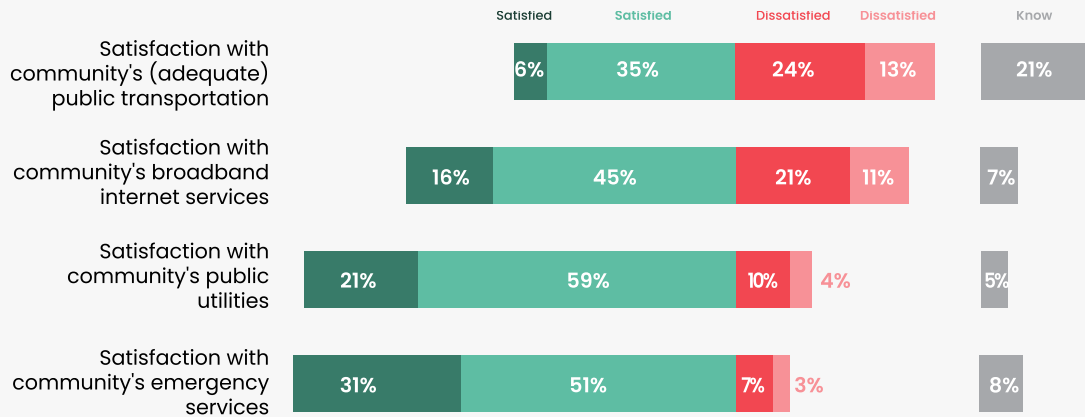
As previously described, when speaking on housing availability, participants mentioned the role of short-term rental properties, seasonal homes, and gentrification displacing residents. These concerns were perceived as impacting the shortage of workforce housing. Participants shared that developers building unaffordable housing does not solve the housing shortage issue, especially for those in the workforce. The lack of affordable housing for this population drives them away, leaving gaps in services.

“The rents are so high here. So, we train[employees], and we lose them because they can’t afford to stay here.”

**– Mental Health Focus Group
Expert**

“If you keep not having affordable homes for the people that provide the services, eventually you’re not going to have the services.”

– Veterans Focus Group Expert

FIGURE 32: SATISFACTION WITH INFRASTRUCTURE AND TRANSPORTATION

Homeowner's Association's (HOA), Neighborhood Code Violations, and Ordinances

Focus group participants mentioned various issues related to HOAs, neighborhood code violations, and ordinances. More specifically, they shared the need for improved communication of codes (e.g., trash and water policies) to residents, especially those who are seasonal. Participants also discussed needing greater enforcement of codes in the community, as current methods, such as issuing letters and fines, were described as too automated and not very effective. These issues could be related to county growth, as more growth could have led to lack of awareness of codes that requires greater enforcement by HOAs as a result.

Community Differences and Disparities

Across Collier County zip codes, more than three-quarters of BCAS respondents expressed dissatisfaction with access to affordable housing, making this a consistent concern for residents of different parts of the county. The zip code where respondents were most likely to say that controlling housing costs should be a top priority for county leaders were 34138 (86%), 34104 (77%), and 34142 (75%). These zip codes correspond to the areas of Chokoloskee, Radio Road Corridor

and surrounding areas, and Immokalee. Lower-income and Hispanic survey respondents were significantly more likely to say that controlling housing costs should be a priority.

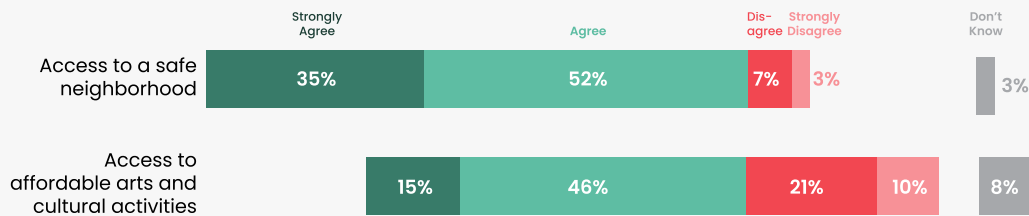
The zip codes where most BCAS respondents expressed dissatisfaction with homelessness supports were 34104 and 34142. Corresponding to the Radio Road Corridor and surrounding areas, and Immokalee, in both cases, more than 50% of respondents said they were dissatisfied or very dissatisfied with homelessness supports.

Infrastructure and Transportation

Survey: Collier County Opinions

The BCAS asked about satisfaction with adequate public transportation (Figure 32). Around a fifth of respondents (21%) said they were unsure about satisfaction with public transportation, and the remaining responses were fairly mixed. Just over a third (35%) said they were satisfied with public transportation, and 6% said they were very satisfied. On the other hand, about a quarter (24%) expressed feeling dissatisfied, and another 13% felt very dissatisfied with public transportation in Collier County.

FIGURE 33: ACCESS RELATED TO INFRASTRUCTURE



The BCAS also asked how satisfied respondents were with broadband internet services in their community. The most selected answer was satisfied, with 45% of respondents selecting this option, and an additional 16% said they were very satisfied. While a majority reported that they were satisfied, nearly a third said they were not satisfied with the state of broadband services (21% dissatisfied and 11% strongly dissatisfied).

A strong majority of BCAS respondents were satisfied with the public utilities in their community. Overall, 59% expressed that they were satisfied, while another 21% said they were very satisfied. Just 10% said they were dissatisfied, and 4% were strongly dissatisfied with their community's public utilities. This was one of the areas where satisfaction was strongest in the BCAS.

Most BCAS respondents agreed that residents in their area had access to a safe neighborhood (Figure 33). Across the county, 35% strongly agreed, 52% agreed, 7% disagreed, and 3% strongly disagreed. This was one of the areas where the agreement was strongest. Similarly, respondents were largely satisfied with emergency services in their community, with 31% saying they were very satisfied and another 51% saying they were satisfied. Another 7% said they were dissatisfied, and 3% said they were very dissatisfied with emergency services. This left 8% unsure about their satisfaction with emergency services in their community.

Most respondents also agreed that residents in their community had access to affordable arts and cultural activities. In this area, 15% strongly agreed, 46% agreed, 21% disagreed, and 10% strongly disagreed. This left 8% who expressed that they didn't know.

Focus Group Reactions

Community Infrastructure and Safety

Focus group participants mentioned many challenges and barriers they face in the county relating to infrastructure and transportation. Parking concerns were discussed, including difficulties parking downtown during the busy season and the need for additional parking garages. These challenges relate to participants' concerns 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.

Additionally, participants emphasized their desire for more green space in the community. They shared that they do not believe there are enough green areas for children to play or residents to participate in recreational activities and that this negatively impacts residents' quality of life. Although participants mentioned the general need for roads to be repaired, they also shared challenges caused by road construction, including how it leads to more traffic and unsafe conditions for pedestrians during the busy season.

“Construction during [the busy] season... That leads into safety [issues for] pedestrians. That leads to congestion on the roads.”

- 34145 Focus Group Participant

Participants also mentioned issues they believe to be caused by street design and ways street design could improve. They expressed hopes to enhance roads (e.g., widening roads, changing traffic light cycles), highways, and interstates to minimize traffic congestion and prevent car accidents.

Participants also spoke about the need for sustainable funding for infrastructure maintenance. Participants, including Infrastructure and Transportation experts, specifically explained their belief that there needs to be a balance achieved between keeping taxes low and funding infrastructure development and improvement.

“There has to be a balance between funding and being able to provide both for safety and future infrastructure.”

-Infrastructure and Transportation Focus Group Expert

Although focus group participants identified many challenges related to infrastructure and transportation, they reflected positively on the existing recreational facilities they have access to in the community, such as parks, athletic fields and courts, and golf courses. They even mentioned that community golf courses offer discounts to county residents during the summer months.

“Our family has really benefited from a lot of opportunity for recreation... And even with kids growing up, having access to the county park system with all

of the little league, and so for organized sports, for athletic fields, for, I mean our waterpark is amazing. There’s pools, there’s pickle ball, tennis courts, there’s golf courses.”

-34120/34142 (Ave Maria) Focus Group Participant

Finally, participants mentioned needing improved and increased pedestrian infrastructure across the county, such as more pedestrian underpasses, bridges, crossing lights, and sidewalks. Participants also expressed that they feel it is unsafe for children to wait for school buses because there are no sidewalks, just roads, to wait on, which do not provide safe spaces for residents to stand by.



Photo courtesy of YMCA of Collier County.

"I like the underpass under 41 by Tin City, that makes it easy to get from one side to the other. Where I live... they've got the crossing light, but even when you get the light, you've got to make sure that you don't have people turning right into your path because they don't realize that you've got the crossing. And I've had people almost run me down when I start across."

– 34113 Focus Group Participant

Transportation and Traffic

Focus group participants expressed varying attitudes toward traffic and public transit in the county, including attitudes toward drivers, cyclists, pedestrians, and public transit. Participants perceived drivers in the community as aggressive and dangerous. They also described a lack of bicycle infrastructure and the problems that result from that, including the safety of bikers and causing traffic congestion. Participants also explained that they feel that commuting to work by bike and biking for leisure are unsafe, particularly emphasizing the hope that building bike paths could come with building new developments across the county.



"We couldn't get a bike path put in because people could walk in off of 41. Meanwhile, we're on a two-lane with no sidewalk and people biking on it and walking on it. It's so dangerous."

– 34109/34110 Focus Group Participant

Finally, focus group participants spoke to challenges caused by traffic volume in the county, including automobile accidents. They cited that some reasons for traffic are seasonal residents and new building developments across the county. An expert from the Infrastructure and Transportation focus group also explained that many of the traffic issues experienced today are due to community design, including how roads were designed in the 1950s and 1960s with the gated communities in Naples in mind. With the restrictions put in place by these gated communities, it resultantly became more difficult for residents that do not reside in gated communities to get from one point to another.

"One of the biggest contributors to the issue of traffic within the county is community design. If you look at the city of Naples... that city was built in the '50s and '60s ... then gated communities have obligated and restricted the interconnection between point A and point B to a degree towards where we have a limited north-south corridors and east-west corridors. Therefore, we have to go to six lane highways to be able to handle the volume of traffic trying to integrate your pedestrian and your bicyclist, the other modes that travel."

–Infrastructure and Transportation Focus Group Expert

Another reason for the increased traffic volume cited by participants is the high number of commuters. They shared how transit gaps contribute to worker shortages in the community, including how affordable housing is far from where residents work in the county and how commuting in traffic reduces the number of hours residents can work.

Public Transportation

Participants described various challenges they face regarding public transportation in the community, including buses getting stuck in traffic and how bussing as a form of public transportation is not a sustainable option with ongoing parking and traffic issues in the community. Some participants felt that driving is easier and faster than public transportation options in the community to avoid being late to work or even longer commutes that would be endured using public transit. Additionally, participants mentioned unreliable service, as well as needing increased frequency in public transit service and more bus stops. Participants notably suggested expanding bus service to Fort Lauderdale/Miami connection, Bay Pines, the David Lawrence Center and other shelters, and smaller surrounding communities more generally. When referencing Bay Pines, participants are likely referring to the Bay Pines VA Health Care System.

“We had a student that worked for us at the front desk. They used to take a bus from Immokalee every day at five in the morning because that was the only bus that could get him to school in time. He was on the bus two hours in the morning... So, I think transportation is an issue in all aspects of this community. I think our public transportation is an issue.”

– Education Focus Group Expert

Participants also spoke to reliability issues with paratransit for individuals with disabilities, such as instances where the ride service did not arrive on time or at all or dropped off individuals much later than anticipated.

Some participants offered recommendations for improving bus service in the community, including focusing on specific areas of the county to provide consistent, reliable, and accessible service. Regarding broader public transportation recommendations, participants suggested that the government implement a monorail system, a high-speed rail, or a trolley system to address current transportation challenges faced by community members.

Emergencies and Natural Disasters

In contrast to the BCAS findings, focus group participants spoke about challenges they have experienced with emergency and disaster management, preparedness, and response in Collier County, as natural disasters have become more common in recent years. Specifically, some participants emphasized the need to have conversations about resiliency to overcome future natural disasters, while others praised the work of the emergency management system already in place.

Participants also emphasized that environmental disasters disproportionately impact vulnerable populations, such as lower-income communities and people experiencing homelessness. They believe that these communities need more preventative resources to prevent this from happening in the future.



“One element we’re kind of leaving out this is the differential effect of hurricanes and other environmental catastrophes on minority communities here and on the poor residents of the county... We have to try to figure out ways to focus more efforts in those communities. Preventive efforts, ideally.”

- Environment Focus Group Expert

“Collier County [as a community] is not prepared as well as we probably could have been for a hurricane because we had all these displaced people, and they had no place to go. We had so many issues... There should be preparedness for other things that could happen. And the hurricane was one that wiped out so many families.”

-34112 Focus Group Participant

Focus group participants also mentioned challenges with emergency housing. Some participants suggested making immediate emergency housing services available as short-term solutions residents can utilize when needed. Others mentioned needing better coordination when responding to emergencies and disasters, as they report observing miscommunications leading to essential food and water deliveries being dropped off at the wrong locations and people not getting what they need.

“I guess the only thought about [Hurricane] Ian is having a proactive plan. We had to reach out to a lot of our partners and figure out who was doing

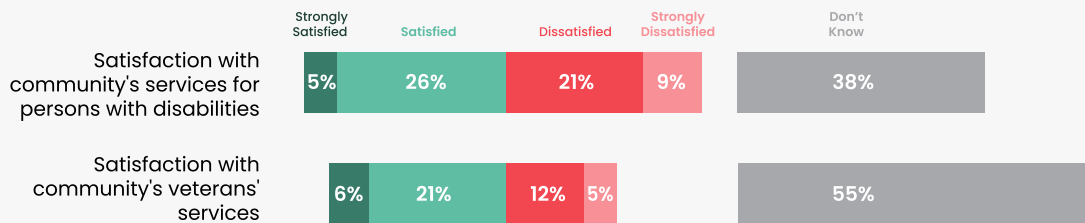
what. And then we double up services accidentally because we’re getting water and so is another organization. Next thing you know we’re delivering it to churches, and they got a ton of water, they don’t have food. So, we’ve actually been working with some other foundations to try to get a proactive plan in place, so we know what each organization is going to be responsible for during a natural disaster or something like that.”

- 34145 Focus Group Participant

Post-disaster restoration was also mentioned by focus group participants, specifically experiencing challenges with contractor availability to complete repairs caused by disasters. Participants also mentioned challenges working with FEMA and securing insurance coverage due to disasters. They shared their experiences of when extended periods passed without resolution to their insurance claims after these events. Participants also discussed needing centralized relief resources post-disaster, as some participants found it challenging to locate or access different services they needed because these resources were not working together.

Community Differences and Disparities

Satisfaction with public transportation varied by zip code on the BCAS. Areas where respondents were most likely to say that they were dissatisfied or very dissatisfied were 34139 (83%) and 34138 (71%), corresponding to Everglades City and Chokoloskee. Survey respondents were most dissatisfied with broadband internet services in 34139 (78% disagree or strongly disagree), Everglades City. Satisfaction with broadband internet was also lower in Immokalee and other parts of Eastern Collier.

FIGURE 34: SATISFACTION WITH SERVICES FOR SPECIAL POPULATIONS

While satisfaction with public utilities was reasonably strong across zip codes, there were a few zip codes where dissatisfaction exceeded 30% of respondents: 34142 (34%) and 34139 (30%), or Immokalee and Everglades City. Lower-income, Black/African American, and Hispanic survey respondents were also significantly less satisfied with public utilities in their communities.

The zip codes where survey respondents were most likely to disagree or strongly disagree that they had access to a safe neighborhood were 34142 (33%) and 34116 (27%), associated with neighborhoods in Immokalee and Golden Gate City. By a substantial margin, the zip code where respondents were most likely to express dissatisfaction with emergency services (31%) was 34142, or Immokalee. Across the county, lower-income and non-White respondents expressed significantly less satisfaction with emergency services.

Survey respondents were most likely to disagree or strongly disagree that they had access to affordable arts and cultural activities in 34142 (53%), 34139 (48%), and 34117 (48%). Associated neighborhoods fall in Immokalee, Everglades City, and rural Eastern Collier. Lower-income and Hispanic survey respondents were somewhat more likely to disagree that they had access to these amenities in their community.

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. Many different topics, challenges, and needs were discussed due to the wide reach of who is included within this domain.

Survey: Collier County Opinions

The BCAS asked respondents how satisfied they were with their community's services for disabilities (Figure 34). Over a third of respondents (38%) were unsure. Otherwise, attitudes were mixed and divided between expressing satisfaction and dissatisfaction with services for persons with disabilities. Notably, almost one in ten respondents (9%) strongly disagreed that they were satisfied with these services.

Just over half of BCAS (55%) respondents said they were unsure how satisfied they were with veterans' services in their community. This reflects limited familiarity with the state of these services for a large portion of the population. Otherwise, attitudes leaned favorable, with the most selected response being satisfied (21%) and a further 6% feeling very satisfied. On the other hand, 12% said they were dissatisfied, and another 5% felt very dissatisfied.

Focus Group Reactions

Needs of Residents with Disabilities

When queried about the needs of residents with disabilities, 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. Examples of such infrastructure included fitness centers and walkable grocery stores. Additionally, participants discussed needing career support services for special needs residents. As an example, they mentioned not being aware of a service or agency that connects adults with autism to employment opportunities.

Focus group participants also shared how parents in the community worry about their children with disabilities, specifically where they will live and what support will be available to them when they are no longer around. They also expressed the need for better connection to wraparound services and organizations to expand the capacity to provide treatment to individuals with special needs.



Finally, participants discussed the need for more community education and awareness on special needs populations to educate the community on signs of disabilities and emphasize the importance of early intervention care.

“The fact that you can have free support and screening for language delays or developmental delays when students are very young. We miss that early intervention time because we’re getting kids who are five who have severe speech or language delays, and they could have had support for the past so many years... And a lot of people, I see it over and over, they’re not aware.”

- Education Focus Group Expert

Veteran Support

Focus group participants mentioned challenges facing the veterans in the county, including homelessness, inconsistent care at Veterans Affairs (VA) and similar facilities at capacity, and transportation issues to Bay Pines and other comparable facilities. When referencing Bay Pines, participants are likely referring to the Bay Pines VA Health Care System, which includes the Naples VA Clinic in Collier County. It is worth noting that while the Bay Pines VA Health Care System supports nine VA clinics, only four of the nine are currently open.

Regarding housing, participants explained that many older veterans need housing facilities that are “in between” assisted living and full-facility care, as these residents cannot fully take care of themselves but are also not at the stage of needing total assistive care. The benefit of group homes was also elaborated on in the Veterans focus group.

“There is this population that we don’t have a place to put them because they’re in the between... They’re not able to take care of themselves fully, but they’re not at the assistance level place. So, it’s in the middle.”

– Veterans Focus Group Expert

Additionally, participants discussed needing more community awareness about resources available to veterans, such as mental health or substance abuse resources, in the form of a comprehensive guide or accessible database.

“I would like to see, and maybe it exists in some form, is a comprehensive resource guide for all the Veterans Services. I was in San Diego recently and stuck in the local VA Hospital. They have a 12-page guide that any anywhere from sober living homes to drug and alcohol locations. I mean, it’s very, very thorough.”

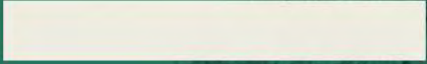
– Veterans Focus Group Expert

Community Differences and Disparities

Neighborhoods where the most survey respondents said they were dissatisfied or very dissatisfied with services for persons with disabilities were 34139 (61%) and 34142 (43%), corresponding to areas around Everglades City and Immokalee. While satisfaction with veterans’ services was relatively consistent across zip codes, more than a third of respondents said they were dissatisfied or very dissatisfied in the same areas. Middle to lower-income and Black/African American survey respondents were significantly more likely to disagree that they were satisfied with veterans’ services than other groups.



COMMUNITY IDENTIFIED PRIORITIES



The BCAS asked respondents to select from a list of the three areas that community leaders should prioritize moving forward. The findings are noted in the previous corresponding sections, and the following is a summary of key takeaways. By a wide margin, the areas that community members most prioritized were 1) controlling housing costs and 2) managing growth and development. Across the county, 65% and 63% of respondents indicated these as crucial priorities, respectively. The third most prioritized area was the environment, including preservation, emergency resilience, and planning, with 41% choosing this as a key priority area. Just under a third of BCAS respondents prioritized bringing better-paying jobs to the area.

TABLE 3: COMMUNITY IDENTIFIED PRIORITIES¹

Priority	2022-2023 Percent	2017-2018 Percent
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

While other topics were selected by less than a quarter of respondents, it is worth noting that some are of most interest to specific segments of the population. For example, 24% selected public education and workforce training, while 19% chose childcare for young children and summer/after-school programs for youth, yet these topics will be most pressing for those community members who are parents or caregivers. Correspondingly, parents were more likely to prioritize childcare and summer after-school programs (32% of parents) and education and workforce training (27%). In addition, lower-income respondents were much more likely to prioritize health care access (e.g., 42% of those with household incomes between \$15,000 and \$24,999).

Community identified priorities had much in common with findings from the 2017-2018 CCCA, although with some noteworthy changes.

- Controlling housing costs was also the top priority in the last survey (45%), although the proportion selecting this focus area has increased since (65%).
- Bringing better-paying jobs to the area was previously the second most selected priority (39%), and this has now dropped to being the fourth most selected (32%).
- Growth management was previously the third most selected priority (39%). In the current survey, this rose to be the second most prioritized, with substantially more respondents selecting this option (63%).
- The environment was previously the fifth most selected priority area (22%), and this rose to the third position (41%), likely in part due to the impact of Hurricane Ian in 2022.
- Public education was previously the least-selected priority area (22%), and a similar proportion selected this as a priority in the current survey (24%).

¹ Respondents had the option to select multiple options, therefore the percentages do not sum to 100%.

CONCLUDING FOUNDATIONAL ISSUES



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. Data associated with these foundational issues is presented within the Findings section and Appendices of this report. The purpose of this section is to highlight the foundational issues identified through the CCCA, along with some potential recommendations to address them.

Where people live matters, it impacts their housing, transportation, financial stability, health, access to resources, and opportunities for prosperity. Collier County residents' top priorities, controlling housing costs and managing growth and development, derived from the community assessment survey and focus groups, transcend all ages, genders, races, ethnicities, socioeconomic groups, and geography. General affordability within Collier County and the capacity to meet diverse resident population needs are prominent concerns.

Controlling Housing Costs

Housing is the cornerstone of stability, but it can also be the most expensive household budget item. Without safe, affordable housing, individuals and families can struggle to maintain stability in other areas of their life, such as education, employment, health care, nutrition, and childcare. They may also face long commutes to work, the inability to save for emergencies, and excessive stress.

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.

Collier County residents challenged to find affordable housing often spend a disproportionate amount of their income on housing. As a result, they are frequently forced to make difficult choices and/or sacrifices. This includes families moving between relatives' and friends' homes due to not having permanent affordable housing. These circumstances negatively impact children's school attendance and continuity as well as their academic achievement and success. Furthermore, the inability to afford basic housing can lead to homelessness. From 2022 to 2023, Collier County's homeless population increased from 462 to 703 individuals, according to the county's homeless point-in-time count.⁶³

Limited availability and accessibility to affordable housing in Collier County includes workforce housing. Workforce housing is defined as affordable housing within proximity to the workplace for a community's labor force. The lack of workforce housing in Collier County requires the local labor force to travel a significant distance to their workplace. Increased travel distance often includes increased travel costs to get to work. These circumstances can create barriers to employment and economic opportunities for county households. They can also contribute to traffic congestion.

The lack of workforce housing can drive a local workforce out of the community, creating gaps in services. The workforce population is critical for a community's goods, services, and amenities. In Collier County, the retail, service, food, and hospitality industries are among the most prevalent and required but also the lowest paid. Consequently, the lack of affordable and workforce housing coupled with insufficient wages can yield an inadequate community labor force. Examples of this condition were specifically mentioned for county school teachers, school bus drivers, and pharmacy workers.

Policies and strategies that increase housing affordability and workforce housing appear vital for Collier County. These approaches can address both rental housing and homeownership, particularly for households with individuals in the labor force. It is critical for people to have the option to live and develop near their work, particularly those workers who are most essential to the local community service network and economy.

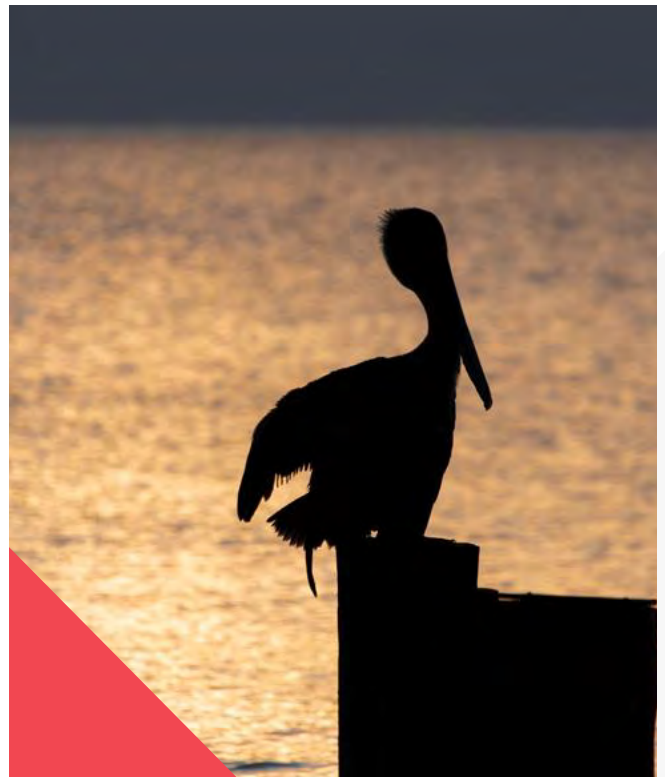
Efforts have been taken in Collier County to address housing costs and affordability. The Collier County Board of County Commissioners established an Affordable Housing Advisory Committee,⁶⁴ commissioned and approved a Community Housing Plan⁶⁵, and adopted a land use package to encourage the building of more affordable housing. Collier County voters approved a referendum in 2018 that included the creation of a Local Housing Land Trust to purchase and develop affordable housing stock. Future actions to control housing costs should be advanced in alignment with these existing entities and efforts.

The cost of living in Collier County is reported as a challenge for residents. Thirty-six percent of county households are an Asset Limited, Income Constrained, Employed (ALICE) population, particularly as the cost of basic life necessities outpaces employment wages. As job earnings were described by county residents as insufficient, bringing better-paying jobs to the area that provide livable wages is important. Furthermore, workforce development initiatives, including English language support, to increase individuals' earning capacity might also prove beneficial.

Significant disparities and vulnerabilities appear among the low-income, minority, and rural communities. The cost of living in Collier County impacts their food security, health care access, and childcare. For these populations, health care is generally not affordable, including with respect to the availability of doctors accepting their insurance, prescription costs, and dental care. In addition, there is a lack of hospitals

and emergency rooms within the outlying and growing communities in which they live, and the transportation distance to a hospital is substantial. Furthermore, parents who require childcare services and after-school programming for their children are on long waitlists.

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.



Managing Growth and Development

Collier County residents also believe improvement is needed in the management of 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.

Collier County's growth and development also impact the environment, and for county residents, managing growth and development includes consideration of the environment. Residents have concerns about pollution, water quality, and accessibility. Their environmental priorities encompass land preservation inclusive of green space and respect for natural wildlife. Residents are also concerned with algae, red tide, beach erosion, and coastal infrastructure.

Collier County has a Growth Management Plan administered by the Comprehensive Planning Section of the Collier County Planning and Zoning Division. This Growth Management Plan provides a vision, framework, and policies for growth within Collier County.⁶⁶ In addition, Collier County voters approved a referendum to fund and expedite sorely needed infrastructure projects.

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.

Access to Health Services

Although access to health, dental, and mental health services were not the most prioritized areas in the community survey overall, they were more highly rated as priorities by lower-income respondents. In addition, there was substantial disagreement about access to these services in respondents' communities. More respondents disagreed than agreed that there was access to 1) affordable health care, 2) affordable dental care, and 3) affordable mental health care. This was reaffirmed in the focus groups, where participants described their inability to afford dental care and prescriptions and expressed that health care was not affordable in their community.

Improving access to these services, particularly for lower-income families and marginalized populations, represents an area where additional services and supports would go a long way toward improving the lives of community members. This is a vital area that non-governmental entities in Collier County could prioritize to address community needs.



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APPENDIX I: QUALITATIVE CODEBOOK

The purpose of a qualitative codebook is to summarize key information and themes synthesized from the focus groups. Parent codes are the main codes, while child codes are sub-categories of the parent codes.

Priority Domain	Code (Parent)	Code (Child)
Economic Opportunity & Employment	Challenges for small businesses	Working out of homes
	Cost of living, inflation, unemployment	
	Food insecurity	- Food services and resources - Inequitable/ineffective distribution of resources
	Lack of childcare options leads to fewer people in the workforce	
	Commuting	
	Stagnant wages	
	Desire for increased accessibility to commercial business	
	Workforce development	Increase access to career mentorship and assistance programs
Education	Private v. public education	- Affordability of good/private education - Private schools have different/less regulation than public - Public schools commute longer than private
	After-school programs	
	Child poverty and homelessness	
	Concerns about the rigor of coursework	Residents calling for county to address issues with schools
	English Language Learner (ELL) support	
	Financial aid issues due to parent tax problems	
	Inequity in education	- Lack of support for certain students across grade levels - Politicization of education - Number of students in the classroom
	School bus system	- Positives and negatives within K-12 system - Need for increased transportation for higher education students

Priority Domain	Code (Parent)	Code (Child)
Education (Continued)	Teachers	• Teacher benefits • Teacher shortages • Volunteers and tutors • Societal pressures on teachers
	Vocational education	
	Waitlists for childcare	
Environment	Emergency/disaster management, preparedness, and response	• Disproportionate impact of environmental change and disasters on vulnerable populations • Preparedness for vulnerable populations • Emergency housing during natural disasters • Uncoordinated emergency/disaster response (hurricane)
	Environmental education and awareness	• Recycling procedures
	Environmental issues related to climate change	
	Post-disaster restoration	• Centralized resources for relief • Contractor availability for repair • Resilient coastal infrastructure needed
		• FEMA- low reimbursement rates and difficult to work with • Issues with federal relief
	Recreation and beaches	• Inequitable access to recreation • Tourism
	Water quality, pollution, and erosion	• Access to fresh, clean water • Erosion/water management • Septic system • Tree cutting and invasive plants • Waste management • Wildlife implications
Health Care & Mental Health Services	Community health care challenges	• Doctors closing or turning concierge • Insurance • Location • Pharmacies closed or understaffed • Technology • Transportation barriers to care

Priority Domain	Code (Parent)	Code (Child)
Health Care & Mental Health Services (Continued)	Availability of providers	• Limited specialists • Not enough doctors for permanent residents and non-permanent during season
	Cost barrier	• No affordable dentists
	Community mental health services and challenges	• Adult-focused treatment • Detention, institutionalization, Baker Act • Not enough mental health programs to support need • Residential rehabilitation • Stigma and attitudes toward mental health • Minimal alternatives to mediocre facilities for adults needing mental health care • Jail is the only alternative for mentally ill • Need more access to youth counseling services
	Health care programs and facilities	• Ambulatory • Program recommendation
	Ineffective or missing services	
	Senior population	• Lack of affordable retirement home or nursing home options
		• Need more senior services
	Substance use and abuse	• Calls for increased awareness and reduction in stigma • Peer support programs require greater focus • Increased prevalence of substance abuse in Collier County
Housing	Affordability	• Issues with affordable housing programs • Tax policy related to affordable housing • Young people living at home
		• Homeowner/disaster insurance mostly costly where housing is most affordable • Regulation construction
	HOA's, neighborhood code violations, ordinances	
	Homelessness and homelessness interventions	• Child homelessness • Hidden homelessness • Post-disaster homelessness (living in RV's)

Priority Domain	Code (Parent)	Code (Child)
Housing (Continued)	Housing availability	
	Landlords and real estate interventions	
	Senior housing shortage	
	Systemic racism	
	Workforce housing problems	• Caretakers can't afford nearby housing • Displacement by short-term rentals and seasonal second homes • Finance workforce housing, not tourist destinations • Gentrification- unaffordable housing doesn't solve workforce housing shortage • Homeowners insurance unaffordable along the coast • Housing developments are outside city borders • Lack of service workers due to housing and infrastructure issues • Not enough people in community to help with natural disasters because of housing shortage • Service people commute into towns because housing is unaffordable • Workforce housing different than affordable housing • Young people living at home far from jobs leading to more commuter traffic • Understaffing because workers can't get nearby housing (police, schools, public sector, etc.)
Infrastructure and Transportation	Attitudes toward traffic, public transit, cyclists	• Drivers aren't careful about cyclists or pedestrians- attitudes that roads are for cars • Stigma against pedestrians and cyclists- association with poverty and tourists • More public transit options than 20 years ago • Drivers are aggressive, dangerous • Driving the wrong way on streets • People should get used to traffic, "be flexible"
	Bicycles	• Lack of bicycle infrastructure • Offering bicycle safety equipment so workers can get home • Unsafe for commuter biking, car-centric infrastructure • Unsafe for leisure biking, reduced leisure biking trails (mountain biking)

Priority Domain	Code (Parent)	Code (Child)
Infrastructure and Transportation (Continued)	Buses	• Buses get stuck in traffic, not a viable solution to parking or congestion • Driving is faster and easier than public transit • More Cap bus stops needed, expanded service to communities • Need increased frequency and more bus stops • Service needs to be reliable • Expand service to specific areas ("East Coast" – Fort Lauderdale, Miami connection; Bay Pines; David Lawrence Center/shelters • Decrease bus service to increase frequency in focus areas
	Car problems	• Cars lost to hurricanes • People stealing cars, desperate
	Community facilities not operating year-round	
	Community safety	• Gun range needed to teach people how to handle a firearm in a safe environment • Gun regulations are inadequate • Police understaffed • Poor pedestrian infrastructure is unsafe • Too dangerous to walk to parks, public amenities • Unsafe traffic/roads • Unsafe for children to wait for school buses (no sidewalks)
	Concerns with increased population	• High density results in less area for building out affordable housing
	Increase green space in cities	
	Paratransit	• Reliability issues
	Parking	• Impossible to park downtown during season • Parking garages
	Pedestrian infrastructure	• Need more pedestrian underpasses, bridges, crossing lights • Not enough sidewalks • Kids "dodging semi trucks" waiting for buses in black school uniforms because no sidewalks • Sidewalks not being installed in new developments (Publix, Regal Acres)

Priority Domain	Code (Parent)	Code (Child)
Infrastructure and Transportation (Continued)	Rail, streetcars, trolleys, etc.	
	Recreational facilities access	
	Road construction	• Everglades preservation limits new road construction • Road construction leads to more congestion • Should install sidewalks as construction is happening
	Street design	• 300 acre fire - no way around - need more roads • Build roads now so housing doesn't have to be demolished later • Friction between high and low speed traffic on arterials ("Stroads") • Identify additional corridors (north-south) • Limits to number of lanes allowed seen as limit to traffic congestion solution • Number of lanes: Goodlette-Frank, Golden Gate • Parkways, bypasses - Alternatives to congested arterials needed ("backroads") • Too dark - more street lights needed • Vanderbilt expansion will end up as congested as Immokalee Road
	Sustainable funding for maintenance	
	Traffic volume	• Accidents • People staying home, "take your life in your hands" to go on the roads • Traffic is dangerous for drivers, pedestrians, and cyclists • Commuter volume linked to worker housing shortage • New developments increase traffic volume • Traffic volume increases during season • Ambulances can't get in and out of gated neighborhoods • Gated communities have single entrance - creates bottlenecks, traffic congestion • Gated neighborhoods street restrictions limit interconnectedness • New developments adding to traffic • Projects at the triangle too dense, worsening traffic • Ritz expansion created bottleneck • Sprawl contributes to commuter traffic • Too far for ambulances, too slow in traffic • Wetland Preservation / Development

Priority Domain	Code (Parent)	Code (Child)
Infrastructure and Transportation (Continued)	Transit gaps contribute to worker shortage	• Affordable housing is far from jobs • Can't get to work during tournaments because of traffic • Commuters need viable public transit options • Hours in traffic reduces hours people can work
	Ride share filling gaps in public transit	
	Utilities	• Inefficient Wi-Fi at library • Move power/internet infrastructure underground
		• Phone system issues • Septic system issues • Trash service issues • Water bill issues
	Youth, veterans, people with disabilities, and seniors need public transit options	• College kids need public transportation • Emergency mental health re-entry-patients need transit home • People seeking emergency shelters need transit • People with disabilities need reliable transportation • Social isolation and poverty exacerbated by limited public transit options • Veterans need transit to Bay Pines
Special Populations	Adult-focused special needs readiness programs are needed	• Community-focused infrastructures for special needs adults • Safety for people with disabilities
	Career support for special needs residents	
	Connecting wraparound services and organizations to expand capacities for special needs treatment and care	
	Immigrants, migrants, and non-English speaking populations	• Language • Sponsorship
	Ineffective public school special needs programming	
	Opportunities for youth in the community	
	Parents' challenges	
	Revise early intervention procedures with more direct programs	• Medical recommendation to avoid routines for early intervention i.e., "shuffling the deck"
	Special needs education and awareness	

Priority Domain	Code (Parent)	Code (Child)
Special Populations <i>(Continued)</i>	Veterans	• Housing homeless veterans • Inconsistent care at the VA • Push for awareness of available resources for veterans • Transportation to Bay Pines • Wounded Warrior • Veteran concerns over facilities capacity • Public funding of the VA

APPENDIX II: INCLUDED PROGRAM DOCUMENTS

Collier County Degree Attainment 2021

Collier County Dementia Care and Cure Initiative 2021

Collier County Economy Overview 2022

Collier County Government Data and Reports

Collier County Sheriff Calls for Service 2021

Community Health Assessment: Age-Friendly Action Plan 2022

Crime Breakdown and Adult Baker Acts 2021

David Lawrence Center Mental Health Reporting 2022

Early Learning Coalition data 2022

Emergency Medical Services 2022

Estuaries Report Card 2017

FAFSA Completion 2022

FGCU Regional Economic Research Institute Collier County Fast Facts 2021

Future Ready Collier County Annual Report 2021-2022

Future Ready Collier County: National Students Clearinghouse Updates 2020

Hunger and Homeless Coalition Report 2022

NCEF Child Wellbeing Report 2023

PIT Homeless Snapshot 2023

Southwest Florida Climate Change Survey 2022

Southwest Florida Community Profile 2022

Southwest Florida Education and Economic Outcomes Report 2022

APPENDIX III: COLLIER COUNTY BRIEF COMMUNITY ASSESSMENT SURVEY (BCAS)

*Please note that this survey was available both online and in print, and in English, Spanish, and Haitian Creole.

Survey # _____

Collier County Community Assessment Survey: 2022-2023

Community input makes a difference! The 2018 Collier Community Assessment led to many initiatives that would not have happened without the input of community members. Now, we are conducting a new survey to understand perceptions related to the strengths and needs in our community as well as how these may have changed since 2018.

This survey is being conducted by the **Richard M. Schulze Family Foundation** and the **Collier Community Foundation** in partnership with *Q-Q Research Consultants*. Your participation will help leaders in Collier County identify opportunities to improve the quality of life.

The survey will take **less than 10 minutes** to complete. Your responses will be kept confidential and anonymous. You should only complete the survey once. To qualify for this survey, you should be at least 18 years of age and have either worked or resided in Collier County for at least half of the past year. We thank you in advance for taking a few minutes to share your thoughts.

Part 1: COMMUNITY RESOURCES AND NEEDS

Residents in my neighborhood have access to:
(Select how much you agree or disagree that people in your neighborhood have access to each thing on the list.)

Community Issue	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
Residents in my neighborhood have access to:					
1. Employment opportunities	SA	A	D	SD	DK
2. Affordable childcare	SA	A	D	SD	DK
3. Affordable health care	SA	A	D	SD	DK
4. Affordable mental health care	SA	A	D	SD	DK

Community Issue	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
5. Affordable dental health care	SA	A	D	SD	DK
6. Food	SA	A	D	SD	DK
9. Affordable arts and cultural activities	SA	A	D	SD	DK
10. Parks and clean beaches	SA	A	D	SD	DK

Part 2: COLLIER COUNTY PRIORITIES

11. Which of the following do you think should be the top priorities for Collier County's leaders and elected officials to work on during the next two years? (Please select **the three (3) areas** you think are most important.)

- ☐ Bringing better paying jobs to the area
- ☐ The environment (preservation, emergency resilience, and planning)
- ☐ Controlling housing costs
- ☐ Managing growth and development
- ☐ Access to dental and health care (including access to primary care, specialty services, etc.)
- ☐ Public education and workforce training
- ☐ Mental health services
- ☐ Childcare for young children and summer/after-school programs for youth
- ☐ Other _____

Part 3: SATISFACTION WITH COMMUNITY SERVICES

How satisfied are you with your community's services related to the areas listed below? *(Please read each issue below and circle the response that most closely matches your opinion.)*

Community Service	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied	Don't know
12. PreK-12 education	VS	S	D	VD	DK
13. Post high school education	VS	S	D	VD	DK
14. Workforce training	VS	S	D	VD	DK
15. Homelessness supports	VS	S	D	VD	DK
16. Services for persons with disabilities	VS	S	D	VD	DK
17. Adequate public transportation	VS	S	D	VD	DK
18. Emergency services	VS	S	D	VD	DK
19. Broadband internet services	VS	S	D	VD	DK
20. Public utilities	VS	S	D	VD	DK
21. Veterans' services	VS	S	D	VD	DK
22. Emergency preparedness	VS	S	D	VD	DK
23. Growth management	VS	S	D	VD	DK
24. Climate change readiness	VS	S	D	VD	DK

Part 4: OPEN ENDED RESPONSES

25. What do you think is the most important thing that could be done to help people living in your community?
26. What do you think is most important for your community in order to be prepared for future emergencies (pandemics, natural disasters, etc.)?

Part 5: DEMOGRAPHIC INFORMATION

27. What is your zip code? _____
28. What is your gender? ☐ Male ☐ Female ☐ Prefer to self-describe: _____
29. How would you describe your ethnicity? *(You may select more than one option.)*
- ☐ American Indian or Alaska Native
 - ☐ Asian
 - ☐ Black or African American
 - ☐ Native Hawaiian or Other Pacific Islander
 - ☐ White
 - ☐ Hispanic, Latino, Latina, or Latinx
 - ☐ Non-Hispanic Caribbean Islander (e.g., Haitian, Jamaican, etc.)
 - ☐ Other _____
 - ☐ I prefer not to say
30. What is your age? ☐ 18 to 30 ☐ 31 to 40 ☐ 41 to 50 ☐ 51 to 60
☐ 61 to 69 ☐ 70 or above
31. What level of education do you have?
- ☐ 8th grade or less ☐ Some high school ☐ Completed high school or GED
 - ☐ Some college ☐ College graduate ☐ Vocational or technical training
 - ☐ Advanced or other degree

32. How long have you lived in Collier County? ☐ Less than 1 year

☐ 1 – 3 years

☐ 4 – 9 years

☐ 10 years or longer

33. Are you a parent of a child under 18? ☐ Yes ☐ No

If yes, how many children currently live in your household? _____

34. Are you a homeowner? ☐ Yes ☐ No

35. Do you live in Collier County year -round? ☐ Yes ☐ No

36. Are you currently working? ☐ Yes ☐ No

If not currently working, are you retired? ☐ Yes ☐ No

If not currently working, are you disabled? ☐ Yes ☐ No

If not currently working, are you lacking adequate transportation? ☐ Yes ☐ No

If not currently working, are you lacking adequate childcare? ☐ Yes ☐ No

If not currently working, are you unable to find suitable employment? ☐ Yes ☐ No

37. Do you currently have health insurance? ☐ Yes ☐ No

If Yes (you currently have health insurance), which type of health insurance do you have?

☐ Private Insurance

☐ Public Insurance (Medicaid or Medicare)

38. Which of the following best describe your yearly household income?

☐ Less than \$5,000 ☐ \$5,000 - \$14,999 ☐ \$15,000 - \$24,999

☐ \$25,000-\$49,999 ☐ \$50,000-\$75,000 ☐ \$75,000-\$100,000

☐ \$100,000- \$149,999

☐ \$150,000- \$199,999 ☐ \$200,000- \$249,999 ☐ \$250,000 or more

APPENDIX IV: FOCUS GROUP GUIDE

FOCUS GROUP GUIDE FOR COLLIER COUNTY COMMUNITY ASSESSMENT- VOLUNTEERS

1. Preparation

- Arrange the group in a circle of chairs, with or without a table
- Provide nametags
- Instruct participants to complete the demographic survey.

2. Introduction

Thank you for participating in this focus group. The purpose of today's focus group is to hear your opinions about your community's needs and how satisfied you are with your community's services. Your answers will help community leaders design programs and services for residents of Collier County. As a community resident, your participation today will help us understand these needs better.

Your answers will be confidential, and no names will be used in our summaries and reports. There are no right or wrong answers to any of the questions that we'll talk about today. Please feel comfortable being open and honest, and share your thoughts, even if they differ from what others have said.

Notes will be taken during our discussion and the session will be recorded. Your answers will be confidential, and no names will be used in our summaries and reports. The discussion will take approximately 1 hour.

3. Obtain Written/Verbal Consent

4. Guidelines

Before we get started, let's go over some guidelines for a respectful discussion.

- First, the conversation will be recorded and transcribed for data analysis purposes. We want to ensure that we can refer to the information that you share and can represent it as accurately as possible.
- Please speak up so everyone can hear, but also be mindful that you are not talking out of turn or over someone else.
- We encourage you to use first names. We ask that before you speak, you say your name to help us distinguish who is speaking in the recording. Although names will be mentioned during the discussion, your name will not be included in any report we create.
- All your responses will be kept confidential. The contracted research team is the only group that will have access to the audio recordings and transcripts, and the audio recordings will be deleted once the data is analyzed.

- What we say here, stays here. Please don't share our discussions with people outside this room.
- Participation in the focus group is voluntary. If you feel uncomfortable answering the questions or for any other reason – you may choose not to answer any of the questions. If you feel more comfortable jotting your answers down, you are more than welcome to do so.
- Please, turn off your cell phones or leave them on vibrate mode.
- Think big. This is not about your individual issues, but the issues of the community (e.g., noisy neighbor as opposed to traffic accidents in our community)
- Do I have your consent to participate in this focus group?
- Any questions before I begin recording and we begin the focus group?

I am going to begin recording the session now.

5. WARM-UP

1. Today's discussion is meant to better understand the needs of individuals in your community. To begin, could you please share what you think are the top priorities in your community that Collier County leaders and elected officials should work on during the next two years? These may be needs that you personally experience or needs that other members in your community experience.

6. GENERAL

2. What services/supports have you utilized in your community?
3. Which services were effective in meeting your needs?
4. Which services were not?
5. What services/supports do you think are missing or lacking in your community to support you or other community members?
6. What community resources are you aware of that we have not yet mentioned (consider resources that you may or may not use)?

7. WRAP-UP

7. Is there anything else you would like to share that we didn't cover already?

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