



M O O R E I A C O F A N O G O L T S M A N , I N C .

February 20, 2015

Memorandum

To: Tim Jackson, Director, Real Estate, Plum Creek

From: Joan Chaplick, Principal, MIG, Inc.

Subject: Methodology and data sources for the comparison of economic conditions in east and west Alachua County

Introduction:

In October 2014, the attached Power Point slides were presented at the October 9, 2014 meeting of the Envision Alachua Task Force. The presentation shows a comparison of economic conditions for the east and west sides of Alachua County. This information was developed to respond to misinformation presented at the September 2014 Community Workshops where it was stated that there was no difference in economic conditions between the west and east sides of the County.

The data was compiled and analyzed by Thinkspot, Inc., with some refinements made by MIG, Inc. to improve clarity. Along with comparing economic conditions based on location, the research and analysis also responds to some potential concerns that inclusion of the student population, which is a typically a low wage earning population, skews the data and presents a more negative economic picture than really exists.

Methodology

The purpose of the presentation was to illustrate the difference in economic conditions on the east and west sides of Alachua County. For the purpose of the analysis, the east and west area county designations were defined based on zip codes. Three ZIP codes located generally west and east of the University of Florida campus and with student populations estimated to be below 2.2 percent were aggregated for comparison: West Gainesville: 32653, 32605, 32606; and East Gainesville: 32667, 32641, and 32640.

Zip codes were selected as the geographic unit of measurement because the various data sources needed to present a comparison of conditions are organized based on ZIP code, making the ZIP code a standard spatial unit of measure for the analysis. The source of the data for this analysis is Esri, an international supplier of Geographic Information System (GIS) software, web GIS and [geodatabase](#) management applications. Esri U.S. Demographics are available across the ArcGIS platform, offering a comprehensive set of demographic, lifestyle, spending, and business data for mapping and analysis purposes. Esri U.S. Demographics can be accessed through web maps and GeoEnrichment services, which include infographics, data enrichment and reports. The attached Fact Sheet from Esri describes the full array of data sources available to support this analysis.

The analysis was supplemented by data from the Alachua County Health Needs Assessment, which was prepared by the WellFlorida Council. The report identified student population estimates by ZIP code (see Table TA-7 on the next page).

WellFlorida Council, Inc. is a private, nonprofit 501(c)(3) organization created in 1969. It is the state designated local health council for 16 counties in North Central Florida, including Alachua County, and specializes in health-related consultancy for clients and projects throughout Florida. WellFlorida is a respected data source on health and wellness related data.

The National Center for Education Statistics (NCES, <http://nces.ed.gov/>) is the primary federal entity for collecting and analyzing data related to education in the U.S. and other nations. NCES is located within the U.S. Department of Education and the Institute of Education Sciences. NCES fulfills a Congressional mandate to collect, collate, analyze, and report complete statistics on the condition of American education; conduct and publish reports; and review and report on education activities internationally.

These data sources helped refine the analysis and made ZIP codes a more useful geographical delineator for subsequent data review. The Alachua County Health Assessment report also used ESRI as a data source.

The following identifies the specific data source used for specific measures in the analysis. Population estimates in Table TA-7 were used as a reasonable proxy to identify those ZIP codes with populations historically higher than the estimated state student group quarters population of 2.2 percent. In some instances, individual ZIP codes were isolated to illustrate the significant gaps between the respective geographies.

<u>Economic Measure</u>	<u>West Zip Codes</u>	<u>East Zip Codes</u>	<u>Source of Data</u>
Household Net Worth	32653, 32605, 32606	32667, 32641, 32640	ESRI
Ave HH Income	32653, 32605, 32606	32667, 32641, 32640	ESRI
Median HH Income	32653, 32605, 32606	32667, 32641, 32640	ESRI
Per Capita Income	32653, 32605, 32606	32667, 32641, 32640	ESRI
Median HH Disposable Income	32653, 32605, 32606	32667, 32641, 32640	ESRI
Ave HH Disposable Income	32653, 32605, 32606	32667, 32641, 32640	ESRI
No High School Diploma	32653, 32605, 32606	32667, 32641, 32640	ESRI
No College Admission	32653, 32605, 32606	32667, 32641, 32640	ESRI
Blue Collar or Services	32653, 32605, 32606	32667, 32641, 32640	ESRI
Medicaid Eligible	32653	32641	WellFlorida
% Births by Medicare	32653	32640	WellFlorida
% Eligible Free/Reduced Lunch	32653	32640	NCES
Individuals in Poverty	32605	32641	WellFlorida

Table TA-7. Total Estimated Number of Student Population by Zip Code, Alachua County and Florida, 2

Area	2009 Total Population	2009 Group Quarters Population		Estimated Student Population *		
		Number	Percent of Total Population	Estimated Number From Group Quarters	Percent of Group Quarter Population **	Percent of Total Population That Are Students
32601 Gainesville	20,925	1,299	6.2	937	72.2	4.5
32603 Gainesville	7,549	3,279	43.4	3,263	99.5	43.2
32605 Gainesville	26,066	320	1.2	-	-	-
32606 Gainesville	21,198	427	2.0	-	-	-
32607 Gainesville	28,782	332	1.2	196	59.2	0.7
32608 Gainesville	38,631	460	1.2	3	0.7	0.0
32609 Gainesville	20,744	2,789	13.4	383	13.7	1.8
32611 Gainesville	4,893	4,355	89.0	---	NA	---
32615 Alachua	15,055	19	0.1	-	-	-
32618 Archer	9,978	3	0.0	-	-	-
32631 Earleton	600	-	-	---	NA	---
32640 Hawthorne	12,330	3	0.0	-	-	-
32641 Gainesville	13,459	42	0.3	-	-	-
32643 High Springs	10,629	59	0.6	-	-	-
32653 Gainesville	12,805	27	0.2	-	-	-
32667 Micanopy	5,111	19	0.4	-	-	-
32669 Newberry	10,245	10	0.1	-	-	-
32694 Waldo	1,996	1	0.1	-	-	-
Zip Code Total	260,996	13,444	5.2	8,886	66.1	3.4
Alachua County	247,537	13,420	5.4	8,885	66.2	3.6
Florida	19,021,613	415,647	2.2	57,798	13.9	0.3

NA: Zip Code was not available during the 2000 Census.

* Student Population percents were calculated from the group quarter Population from the 2000 Census. This percent was then calculated against the 2009 group Population to determine what number were students.

Then a percent of the students were calculated against the total 2009 Population.

Zip Code 32611 is the Zip Code for the University of Florida. It also includes 32610 and 32612.

** This percent is from the 2000 Census.

Source: U.S. Census Bureau, 2000; ESRI Business Solutions, 2009.

Source for Table TA-7: WellFlorida Council, Alachua County Health Needs Assessment

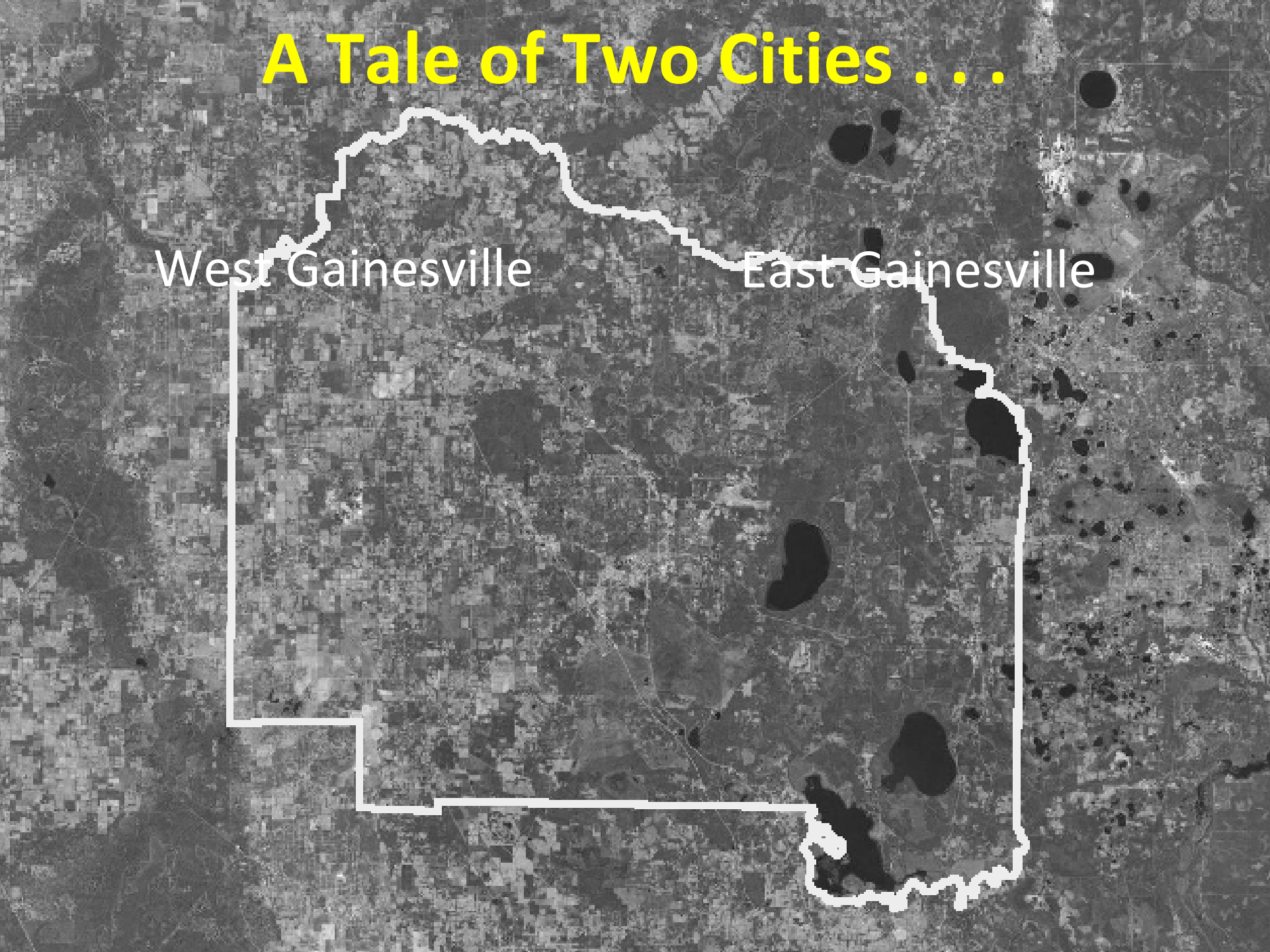
Attachments:

- October 9, 2014 Task Force presentation
- Esri Fact Sheet, Esri U.S. Data
- WellFlorida Council, Inc., Alachua County Health Needs Assessment, Technical Appendix, March 2010 (Excerpts)
- Zip Code Map of Alachua County

A Tale of Two Cities . . .

West Gainesville

East Gainesville



The Need for Economic Progress

West Gainesville

Average household
income:

\$82,170

Median household
income:

\$59,940

East Gainesville

Average household
income:

\$45,039

Median household
income:

\$35,277

The Need for Economic Progress

West Gainesville

Household net worth
below \$15,000:

26.0%

Household income
above \$100,000:

30.0%

East Gainesville

Household net worth
below \$15,000:

45.7%

Household income
above \$100,000:

9.9%

The Need for Economic Progress

West Gainesville

Per capita income:

\$35,943

Median household
disposable income:

\$51,411

Average household
disposable income:

\$65,411

East Gainesville

Per capita income:

\$18,001

Median household
disposable income:

\$29,816

Average household
disposable income:

\$38,726

The Need for Economic Progress

West Gainesville

No high school
diploma:

4.7%

No college admission:

19.6%

Blue collar or
services:

25.4%

East Gainesville

No high school
diploma:

17.8%

No college admission:

50.7%

Blue collar or
services:

44.7%

The Need for Economic Progress

West Gainesville

Percent eligible
free/reduced lunch
(32653):

44.4%

Individuals in poverty
(32605):

10.2%

East Gainesville

Percent eligible
free/reduced lunch
(32640):

78.0%

Individuals in poverty
(32641):

31.7%

The Need for Economic Progress

West Gainesville

Medicaid eligibles
(32653):

8.4%

Percent births covered
by Medicaid (32653):

33.3%

East Gainesville

Medicaid eligibles
(32641):

36.5%

Percent births covered
by Medicaid (32640):

63.5%

Fact Sheet

Esri® U.S. Data

Database Name	Source	Vintage	Description	Updated
Updated Demographics	Esri	2014/2019	Esri offers current-year updates and five-year projections of population, age by sex, race and Hispanic origin, households and families, tenure, home value, household income, household income by age of householder, per capita income, current-year employed population by occupation and industry, current-year marital status, current-year educational attainment, current-year age by sex and race, current-year disposable income, current-year net worth, and more.	Annually
Census Data	Esri and US Census Bureau	2010 & 2000	Esri provides Census data for geographies not supplied by the Census Bureau including ZIP codes, DMAs, rings, drive-times, and hand drawn areas. Esri also provides data for States, Counties, Tracts, Block Groups, Places, CBSAs, Congressional Districts, and County Subdivisions.	Decennially
American Community Survey (ACS)	US Census Bureau	2008–2012	Esri provides ACS data for poverty status, education, labor force, journey to work, marital status, languages spoken, ancestry, and home value. To increase understanding of the data, Esri developed a system of reliability symbols that indicates the accuracy of each estimate. Esri also provides the ACS data for geographies not supplied by the Census Bureau such as ZIP codes, rings, drive-times, and hand-drawn areas.	Annually
Tapestry™ Segmentation	Esri	2014	Tapestry segmentation provides an accurate, detailed description of America's neighborhoods. US residential areas are divided into 67 distinctive segments based on their socioeconomic and demographic composition.	Annually
Retail MarketPlace	Esri	2013	This database includes retail sales by industry to households and retail potential or spending by households. The database provides a direct comparison between retail sales and consumer spending by industry and measures the gap between supply and demand.	Annually
Business Locations	Esri and D&B	2014	Esri's business locations data is extracted from a comprehensive list of businesses licensed from Dun & Bradstreet (D&B). The business list contains data for more than 18 million US businesses including name and location, industrial classification code, number of employees, and sales.	Quarterly
Business Summary	Esri and D&B	2014	This geographic database summarizes the comprehensive list of businesses from Dun & Bradstreet (D&B) for select NAICS and SIC summary categories and includes total number of businesses, total sales, and total number of employees for a trade area.	Annually
Consumer Spending	Esri and Bureau of Labor Statistics	2013	This comprehensive database, developed by Esri, is based on a combination of the latest Consumer Expenditure Surveys (CEX) from the Bureau of Labor Statistics. Data is reported by product or service and includes total expenditures, average spending per household, and a Spending Potential Index (SPI).	Annually
Market Potential	Esri and GfK MRI	2013	The Market Potential database includes data representing goods, services, attitudes, and activities and is collected from the GfK MRI consumer survey. The database provides the expected number of consumers and a Market Potential Index (MPI).	Annually
Traffic Counts	Market Planning Solutions Inc.	2014	Esri's traffic count data comes from MPSI/DataMetrix and provides the most current and extensive US traffic data for trade analysis, routing, or mathematical modeling.	Quarterly
Major Shopping Centers	Directory of Major Malls, Inc.	2014	The Major Shopping Centers data from the Directory of Major Malls (DMM) database includes information about shopping centers with a gross leasable area (GLA) of 250,000 square feet or more.	Semiannually

Continue to next page

Fact Sheet

Esri® U.S. Data

Database Name	Source	Vintage	Description	Updated
Bank Branches	RPM Consulting	2013	Esri's Bank Branches database incorporates information from the BranchInfo™ data created by RPM Consulting. Detailed information about every bank location in the US is carefully standardized and address-matched to provide branch-level information by institution and site over a five-year period.	Annually
Banking Potential	RPM Consulting	2013	MarketBank™ data from RPM Consulting is the source of Esri's Banking Potential database. This information estimates market penetration and potential for 15 savings, investment, and lending products for every block group in the US.	Annually
Crime Indexes	Applied Geographic Solutions	2013	Esri's Crime Indexes data incorporates information from the AGS national CrimeRisk database that is based on an extensive analysis of several years of crime incidents reported by most US law enforcement jurisdictions. The Crime Indexes database includes standardized indexes for a range of serious crimes against both persons and property. The data is available at multiple geographies down to the block group level.	Semiannually

Esri U.S. Demographics are available across the ArcGIS platform, offering a comprehensive set of demographic, lifestyle, spending, and business data for mapping and analysis purposes. Esri U.S. Demographics can be accessed through web maps and GeoEnrichment services, which include infographics, data enrichment, and reports.

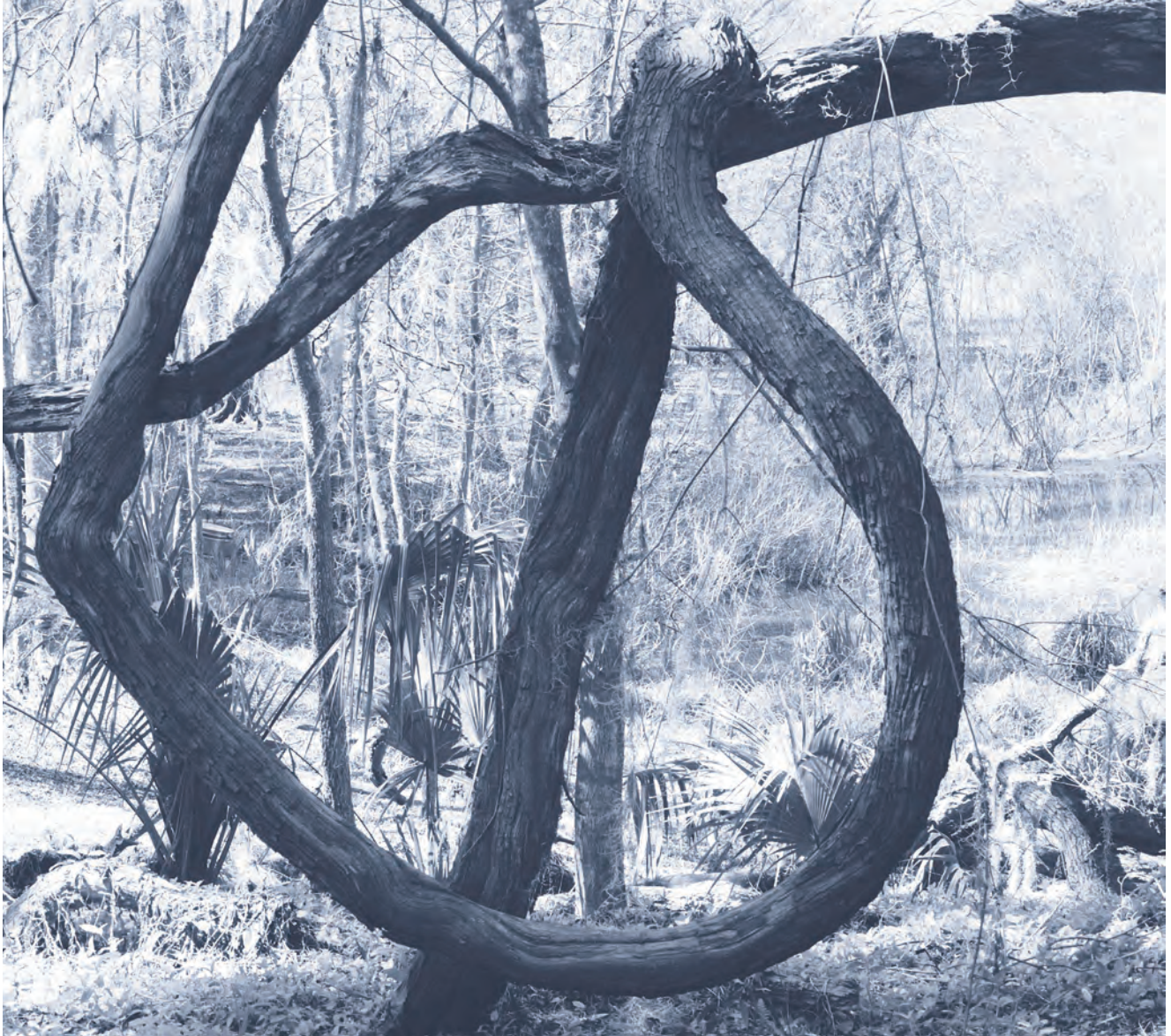
NOTE: Vintages noted are for data orders; however, these vintages may differ in software and online products.



For more information about Esri's data products, call
1-800-447-9778 or visit esri.com/bizdata.

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Alachua County Health Needs Assessment

Technical Appendix

March 2010



Alachua County Health Needs Assessment

Technical Appendix

March 2010

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Poverty Data Tables

Table TA-8. Number and Percent by Level of Poverty by Zip Code, Alachua County and Florida, 2009.

Area	Total Population	0 - 99 % of Poverty		100 - 149 % of Poverty	
		Estimated Number (2009)	Percent (2000)	Estimated Number (2009)	Percent (2000)
32601 Gainesville	20,925	8,595	41	3,321	15.9
32603 Gainesville	7,549	3,429	45.4	1,305	17.3
32605 Gainesville	26,066	2,666	10.2	1,315	5.0
32606 Gainesville	21,198	1,525	7.2	1,401	6.6
32607 Gainesville	28,782	7,745	26.9	3,112	10.8
32608 Gainesville	38,631	14,296	37.0	3,702	9.6
32609 Gainesville	20,744	4,908	23.7	3,014	14.5
32611 Gainesville	4,893	---	NA	---	NA
32615 Alachua	15,055	2,042	13.6	1,770	11.8
32618 Archer	9,978	1,550	15.5	881	8.8
32631 Earleton	600	---	NA	---	NA
32640 Hawthorne	12,330	1,871	15.2	1,366	11.1
32641 Gainesville	13,459	4,269	31.7	1,991	14.8
32643 High Springs	10,629	1,142	10.7	1,034	9.7
32653 Gainesville	12,805	791	6.2	675	5.3
32667 Micanopy	5,111	661	12.9	471	9.2
32669 Newberry	10,245	954	9.3	1,166	11.4
32694 Waldo	1,996	310	15.6	264	13.2
Zip Code Total	260,996	56,755	22.2	26,787	10.5
Alachua County	247,537	56,342	22.8	25,633	10.4
Florida	19,021,613	2,380,088	12.5	1,745,729	9.2
Area	Total Population	150 - 199 % of Poverty		200% + of Poverty	
		Estimated Number (2009)	Percent (2000)	Estimated Number (2009)	Percent (2000)
32601 Gainesville	20,925	1,762	8.4	7,248	34.6
32603 Gainesville	7,549	667	8.8	2,148	28.4
32605 Gainesville	26,066	1,668	6.4	20,417	78.3
32606 Gainesville	21,198	1,101	5.2	17,171	81.0
32607 Gainesville	28,782	2,051	7.1	15,874	55.2
32608 Gainesville	38,631	2,482	6.4	18,152	47.0
32609 Gainesville	20,744	2,303	11.1	10,520	50.7
32611 Gainesville	4,893	---	NA	---	NA
32615 Alachua	15,055	1,362	9.0	9,881	65.6
32618 Archer	9,978	959	9.6	6,588	66.0
32631 Earleton	600	---	NA	---	NA
32640 Hawthorne	12,330	1,180	9.6	7,913	64.2
32641 Gainesville	13,459	1,656	12.3	5,543	41.2
32643 High Springs	10,629	1,231	11.6	7,222	68.0
32653 Gainesville	12,805	702	5.5	10,637	83.1
32667 Micanopy	5,111	261	5.1	3,718	72.7
32669 Newberry	10,245	1,251	12.2	6,874	67.1
32694 Waldo	1,996	198	9.9	1,223	61.3
Zip Code Total	260,996	20,834	8.2	151,127	59.1
Alachua County	247,537	19,691	8.0	145,870	58.9
Florida	19,021,613	1,798,609	9.5	13,097,187	68.9

NA: Zip Code was not available during the 2000 census.

Source: U.S. Census Bureau, 2000; ESRI Business Solutions, 2009.

Table TA-72. Total Number of Births With Medicaid as the Payment Source by Race and Ethnicity, Alachua County and Florida, 2004-2008.

Area	All Races	Black	White	Hispanics
2004				
Alachua County	1,001	528	423	67
Florida	79,882	25,216	51,523	22,029
2005				
Alachua County	1,239	626	552	85
Florida	99,941	31,118	64,948	27,905
2006				
Alachua County	1,291	662	578	98
Florida	103,323	32,396	67,157	29,451
2007				
Alachua County	1,248	640	554	113
Florida	102,205	32,396	65,966	28,461
2008				
Alachua County	1,363	693	605	105
Florida	102,339	32,595	65,743	27,884

Source: www.FloridaCHARTS.com, accessed December, 2009.

Table TA-73. Percent of Births That had Medicaid as the Payment Source by Race and Ethnicity, Alachua County and Florida, 2004-2008.

Area	All Races	Black	White	Hispanics
2004				
Alachua County	38.4	64.9	27.5	40.1
Florida	36.6	53.7	32.2	37.6
2005				
Alachua County	46.1	76.9	33.5	44.3
Florida	44.2	64.9	39.1	43.8
2006				
Alachua County	45.5	76.7	33.3	42.1
Florida	43.6	63.8	38.6	42.0
2007				
Alachua County	43.8	73.5	32.5	43.0
Florida	42.7	62.8	37.8	40.4
2008				
Alachua County	45.7	77.4	33.1	37.9
Florida	44.2	63.5	39.3	42.2

Source: www.FloridaCHARTS.com, accessed December, 2009.

*Medicaid Data Tables***Table TA-84. Number of Medicaid Eligibles and Percent of Total Population by Zip Code, Alachua County and Florida as of December of Each Year 2005-2009.**

Area	Total Population	Medicaid Eligibles	
		Number	Percent
2005			
32601 Gainesville	20,177	2,836	14.1
32603 Gainesville	7,654	226	3.0
32605 Gainesville	25,742	1,478	5.7
32606 Gainesville	20,371	1,070	5.3
32607 Gainesville	30,274	3,019	10.0
32608 Gainesville	36,388	2,864	7.9
32609 Gainesville	19,957	4,336	21.7
32611 Gainesville	4,834	13	0.3
32615 Alachua	13,461	2,058	15.3
32618 Archer	8,836	1,062	12.0
32631 Earleton	779	26	3.3
32640 Hawthorne	11,288	1,610	14.3
32641 Gainesville	13,404	4,410	32.9
32643 High Springs	9,738	1,250	12.8
32653 Gainesville	13,245	920	6.9
32667 Micanopy	4,174	355	8.5
32669 Newberry	8,081	1,139	14.1
32694 Waldo	1,403	368	26.2
Alachua County	237,372	28,940	12.2
Florida	17,926,011	2,233,946	12.5
2006			
32601 Gainesville	19,577	2,689	13.7
32603 Gainesville	7,599	233	3.1
32605 Gainesville	26,274	1,352	5.1
32606 Gainesville	22,193	1,033	4.7
32607 Gainesville	28,877	2,967	10.3
32608 Gainesville	35,277	2,813	8.0
32609 Gainesville	20,090	4,178	20.8
32611 Gainesville	5,121	11	0.2
32615 Alachua	14,248	1,892	13.3
32618 Archer	9,154	1,007	11.0
32631 Earleton	872	19	2.2
32640 Hawthorne	12,120	1,617	13.3
32641 Gainesville	13,153	4,285	32.6
32643 High Springs	10,378	1,207	11.6
32653 Gainesville	13,017	906	7.0
32667 Micanopy	4,687	360	7.7
32669 Newberry	8,854	1,067	12.1
32694 Waldo	1,572	395	25.1
Alachua County	239,909	26,924	11.2
Florida	18,478,309	2,129,623	11.5

Source: Agency for Health Care Administration, Medicaid Program Office; 2005-2009; ESRI Business Solutions, 2005-2009.

Table TA-84 Cont. Number of Medicaid Eligibles and Percent of Total Population by Zip Code, Alachua County and Florida as of December of Each Year, 2005-2009.

Area	Total Population	Medicaid Eligibles	
		Number	Percent
2007			
32601 Gainesville	20,471	2,517	12.3
32603 Gainesville	7,472	200	2.7
32605 Gainesville	25,525	1,282	5.0
32606 Gainesville	21,534	932	4.3
32607 Gainesville	30,395	2,942	9.7
32608 Gainesville	36,996	2,752	7.4
32609 Gainesville	20,117	4,014	20.0
32611 Gainesville	4,931	15	0.3
32615 Alachua	14,542	1,757	12.1
32618 Archer	10,088	976	9.7
32631 Earleton	870	21	2.4
32640 Hawthorne	12,374	1,562	12.6
32641 Gainesville	13,551	4,016	29.6
32643 High Springs	9,689	1,178	12.2
32653 Gainesville	13,375	822	6.1
32667 Micanopy	4,722	326	6.9
32669 Newberry	9,008	1,063	11.8
32694 Waldo	1,585	383	24.2
Alachua County	244,351	26,065	10.7
Florida	18,893,813	2,162,233	11.4
2008			
32601 Gainesville	20,572	2,487	12.1
32603 Gainesville	7,508	192	2.6
32605 Gainesville	25,608	1,574	6.1
32606 Gainesville	20,897	1,063	5.1
32607 Gainesville	29,735	3,173	10.7
32608 Gainesville	36,674	2,928	8.0
32609 Gainesville	20,302	4,324	21.3
32611 Gainesville	4,902	4	0.1
32615 Alachua	14,681	1,944	13.2
32618 Archer	9,634	1,076	11.2
32631 Earleton	590	21	3.6
32640 Hawthorne	12,298	1,698	13.8
32641 Gainesville	13,273	4,554	34.3
32643 High Springs	10,329	1,283	12.4
32653 Gainesville	12,821	952	7.4
32667 Micanopy	5,113	340	6.6
32669 Newberry	9,835	1,214	12.3
32694 Waldo	1,954	418	21.4
Alachua County	243,403	28,008	11.5
Florida	19,119,225	2,386,151	12.5

Source: Agency for Health Care Administration, Medicaid Program Office; 2005-2009; ESRI Business Solutions, 2005-2009.

Table TA-84 Cont. Number of Medicaid Eligibles and Percent of Total Population by Zip Code, Alachua County and Florida as of December of Each Year, 2005-2009.

Area	Total Population	Medicaid Eligibles	
		Number	Percent
2009			
32601 Gainesville	20,925	2,501	12.0
32603 Gainesville	7,549	192	2.5
32605 Gainesville	26,066	1,697	6.5
32606 Gainesville	21,198	1,292	6.1
32607 Gainesville	28,782	3,360	11.7
32608 Gainesville	38,631	3,356	8.7
32609 Gainesville	20,744	4,366	21.0
32611 Gainesville	4,893	16	0.3
32615 Alachua	15,055	2,138	14.2
32618 Archer	9,978	1,154	11.6
32631 Earleton	600	30	5.0
32640 Hawthorne	12,330	1,851	15.0
32641 Gainesville	13,459	4,915	36.5
32643 High Springs	10,629	1,405	13.2
32653 Gainesville	12,805	1,072	8.4
32667 Micanopy	5,111	386	7.6
32669 Newberry	10,245	1,304	12.7
32694 Waldo	1,996	428	21.4
Alachua County	247,537	30,480	12.3
Florida	19,021,613	2,708,723	14.2

Source: Agency for Health Care Administration, Medicaid Program Office; 2005-2009; ESRI Business Solutions, 2005-2009.

Table TA-85. Median Monthly Medicaid Enrollment Rates Per 100,000 for Alachua County and Florida, 1999-2008.

Area	Alachua	Florida
1999	11,794.9	10,332.3
2000	12,542.5	11,483.8
2001	12,589.7	11,969.8
2002	12,958.6	12,535.0
2003	12,284.5	11,982.0
2004	11,690.0	12,174.9
2005	11,925.2	12,300.0
2006	11,249.6	11,858.8
2007	10,558.4	11,264.5
2008	11,884.5	14,020.7

Source: www.FloridaCHARTS.com, accessed February 2010.

Zip Code Map of
Alachua County

Key

- County Boundary
- Gainesville
- Municipality
- Water Body
- Rail Line
- Interstate Highway
- Major Highways



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CONVENED BY PLUM CREEK

