

Demographic Overview & Population Trends

Select Committee on Health Care Workforce Innovation

November 6, 2013

Presented by:



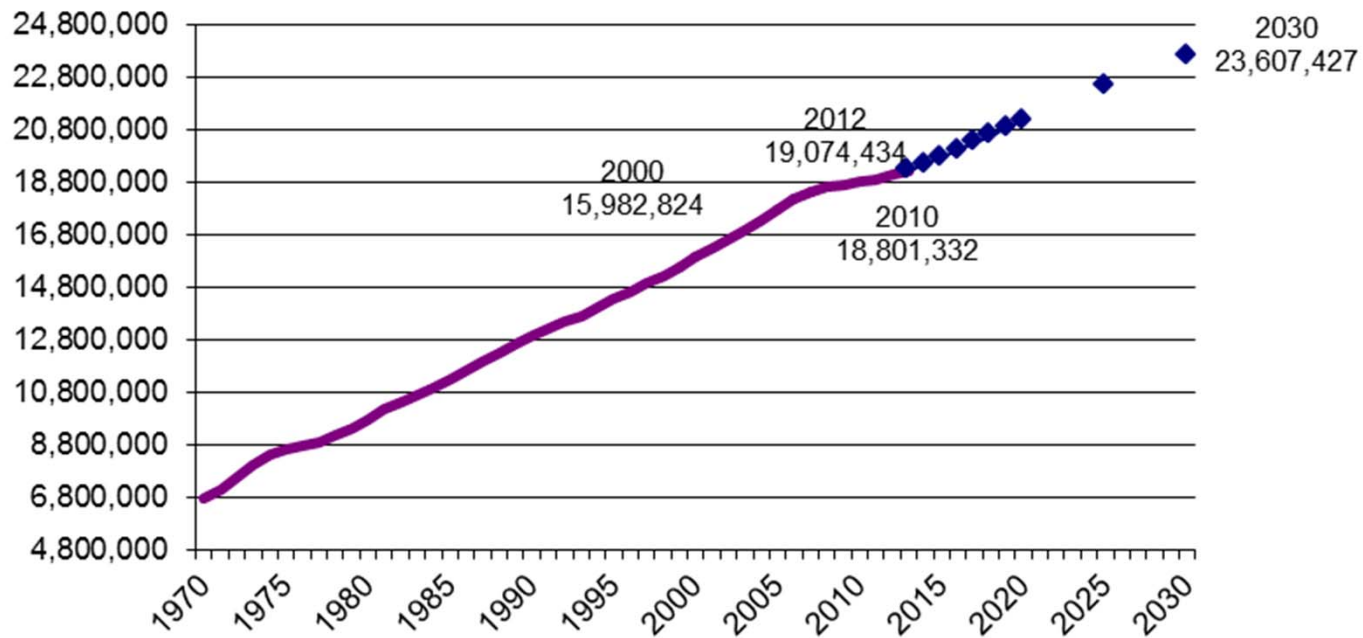
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Population Growth Recovering

- Population growth is the state's primary engine of economic growth, fueling both employment and income growth.
- Population growth is forecast to continue strengthening, showing increasing rates of growth over the next few years. In the near-term, growth is expected to average 1.3% between 2013 and 2015 – and then continue its recovery in the future, averaging 1.4% between 2015 and 2020. Most of Florida's population growth through 2030 will be from net migration (90.0%). Nationally, average annual growth will be about 0.74% between 2013 and 2030.
- The future will be different than the past; Florida's long-term growth rate between 1970 and 1995 was over 3%.
- Florida is on track to break the 20 million mark during 2016, becoming the third most populous state sometime before then – surpassing New York.



Florida's April 1 Population

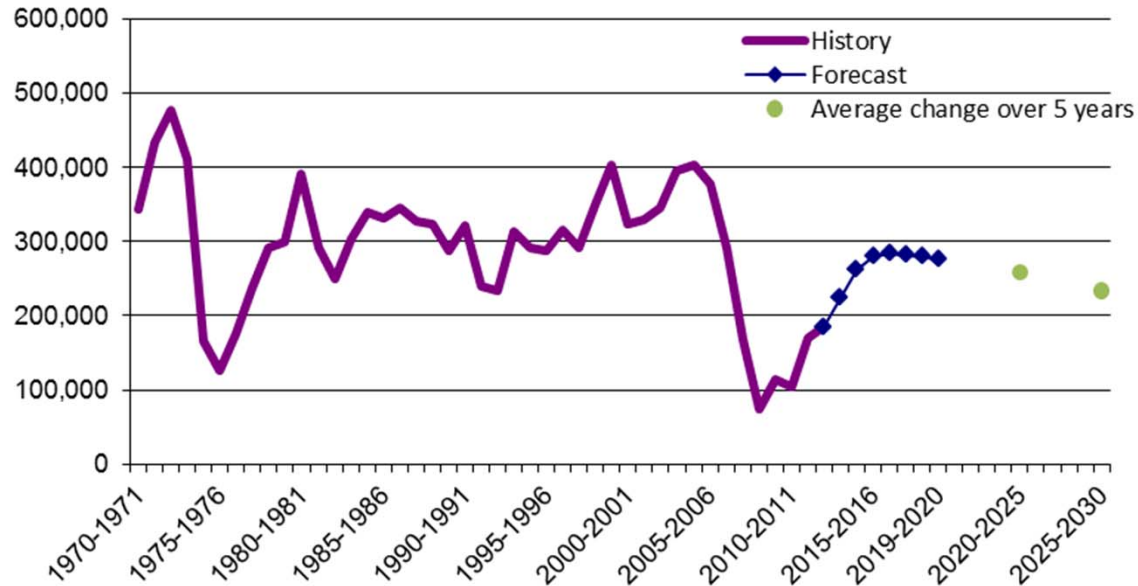


Florida's population:

- was 15,982,824 in 2000
- was 18,801,332 in 2010
- is forecast to grow to 23,607,427 by 2030



Florida's Population Growth



Population:

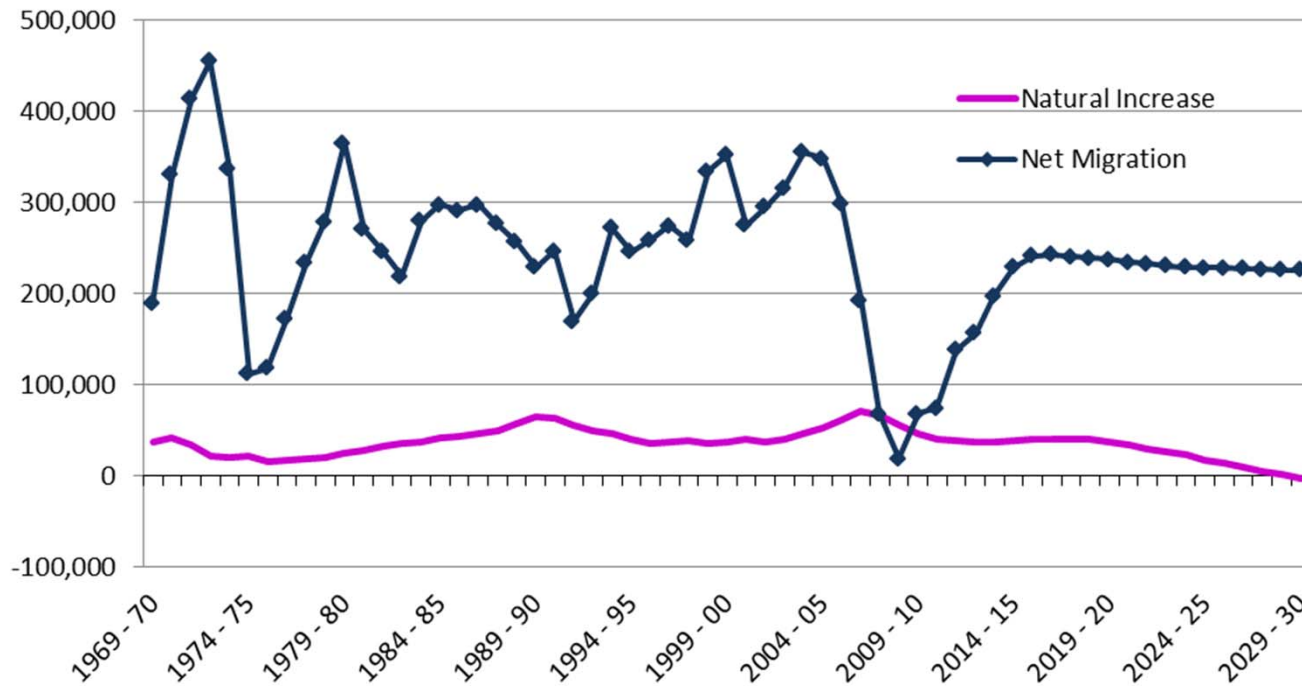
- Average annual increase between 2000 and 2006 was: 361,942
- Average annual increase between 2007 and 2013 was: 135,463

Population is forecast to increase on average by:

- 243,034 between 2013 and 2015 --- a gain of 666 per day
- 280,504 between 2015 and 2020 --- a gain of 769 per day
- 258,657 between 2020 and 2025 --- a gain of 709 per day
- 233,202 between 2025 and 2030 --- a gain of 639 per day

2013	
Orlando	250,415
St. Petersburg	249,704
Hialeah	229,766

Florida's Growth Components

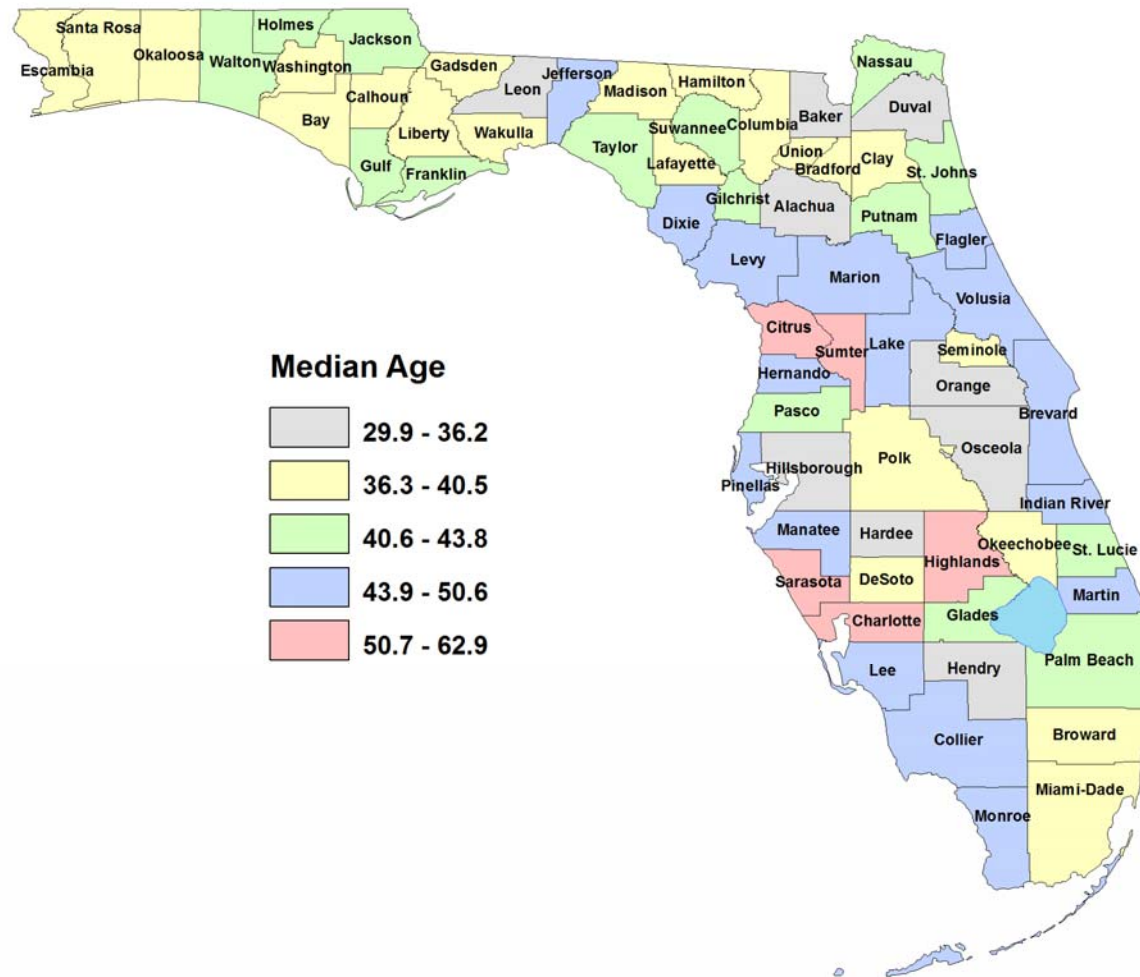


- Typically, most of Florida's population growth is from net migration.
- In 2030, net migration is forecast to represent all of Florida's population growth.



Median Age of Floridians

(April 1, 2012)



- The median age of Florida residents was estimated to be **41** years as of April 1, 2012.
- There was 1 county with a median age below 30: Leon (29.9).
- There were 6 counties with a median age of 50 and older: Sumter (62.9), Charlotte (56.1), Citrus (54.5), Sarasota (53.1), Highlands (52.2), and Martin (50.6).

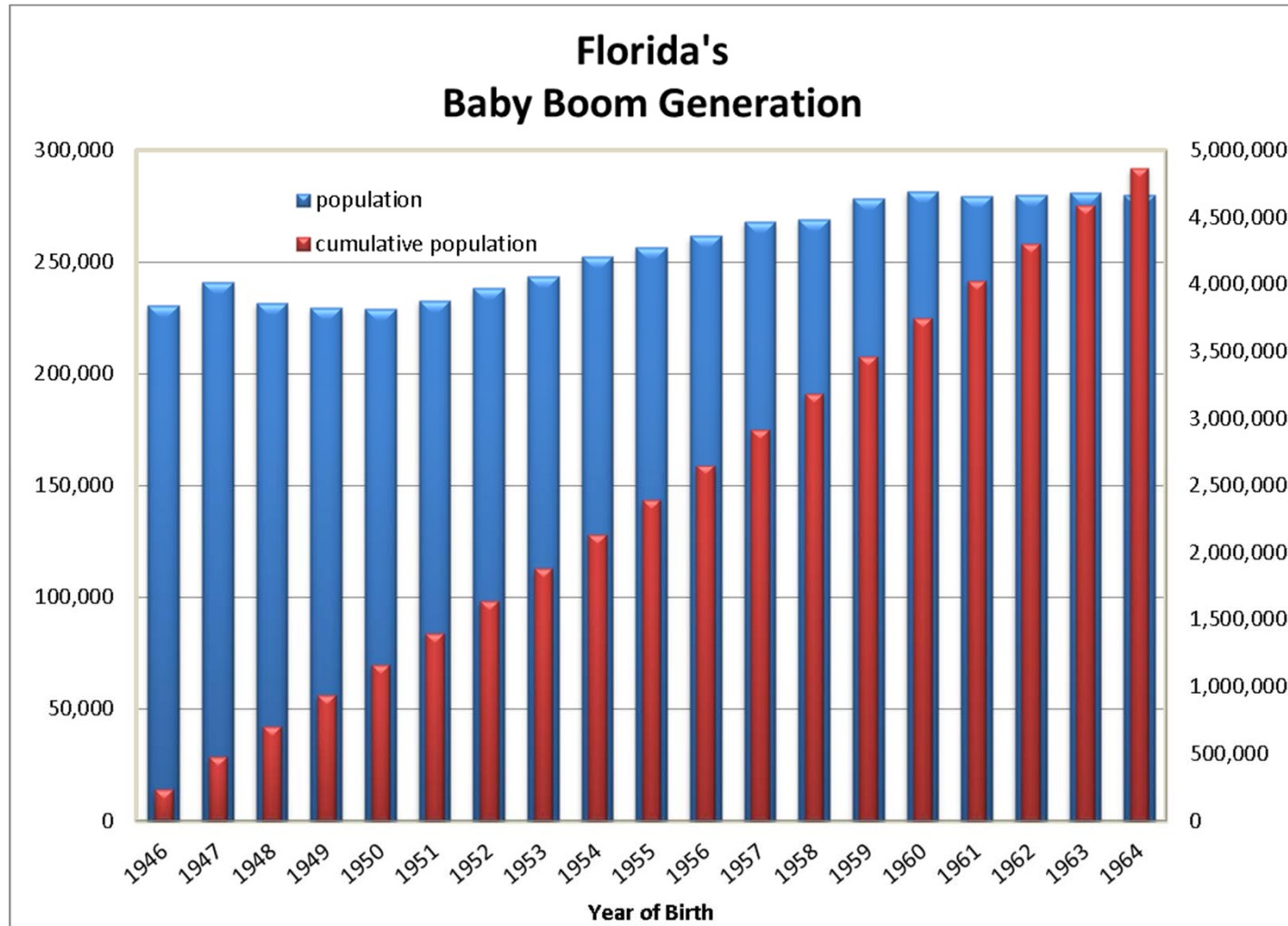
A Fundamental Change to Florida's Economic Future: Baby Boomers

- Birth Cycle: 1946-1964
- 2010 Census count of 46-64 year olds:
 - US: 77.0 million
 - FL: 4.8 million
- Entry into Workforce: 1967-1985
- Entry into Retirement: 2011-2029

2050

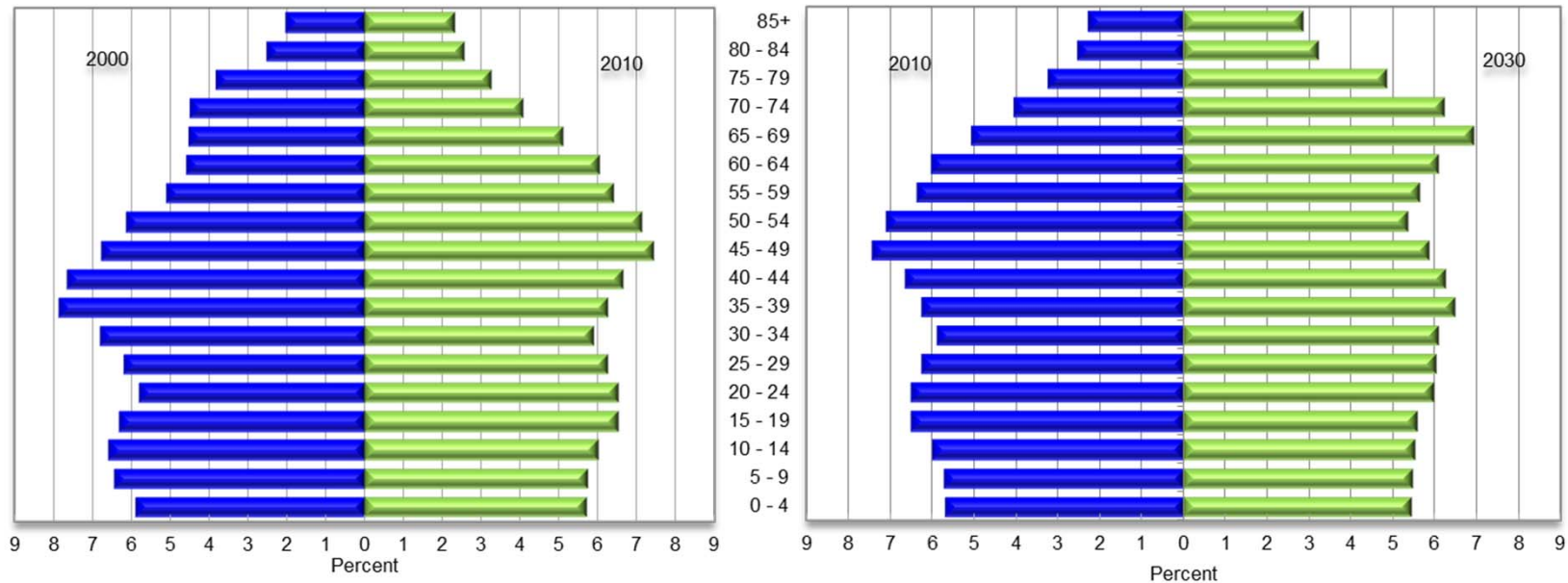


Florida Baby Boom Cohorts



Only three cohorts have entered the retirement phase: 2011, 2012 and 2013.

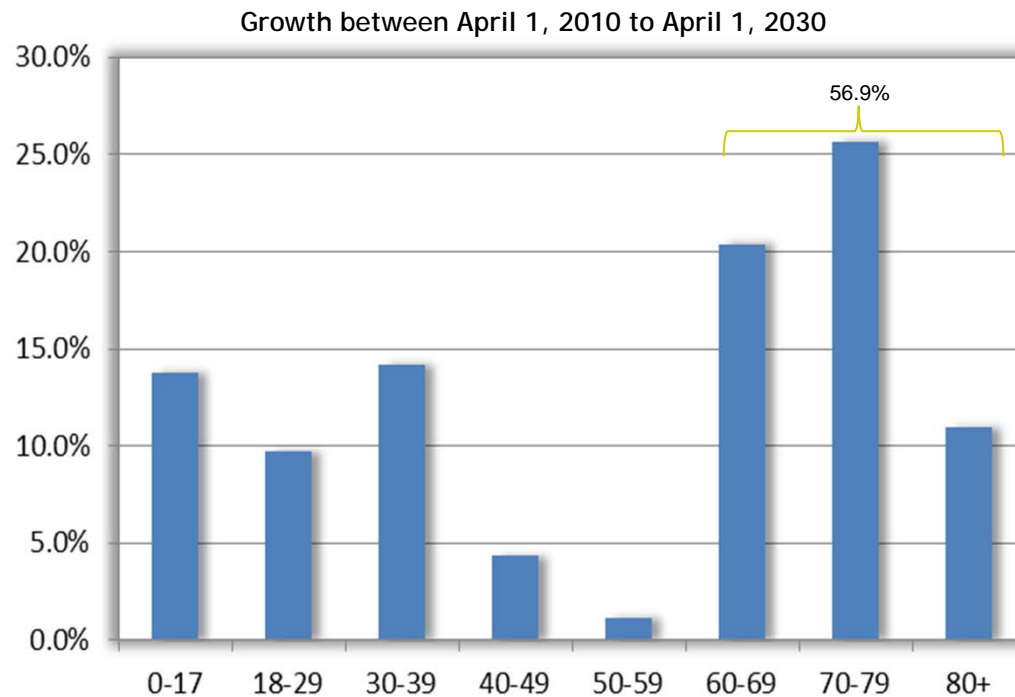
Total Population by Age Group



- In 2000, Florida's working age population (ages 25-54) represented 41.5 percent of the total population. With the aging Baby Boom generation, this population now represents 39.1 percent of Florida's total population and is expected to represent 36.1 percent by 2030.
- Population aged 65 and over is forecast to represent 24.1 percent of the total population in 2030.



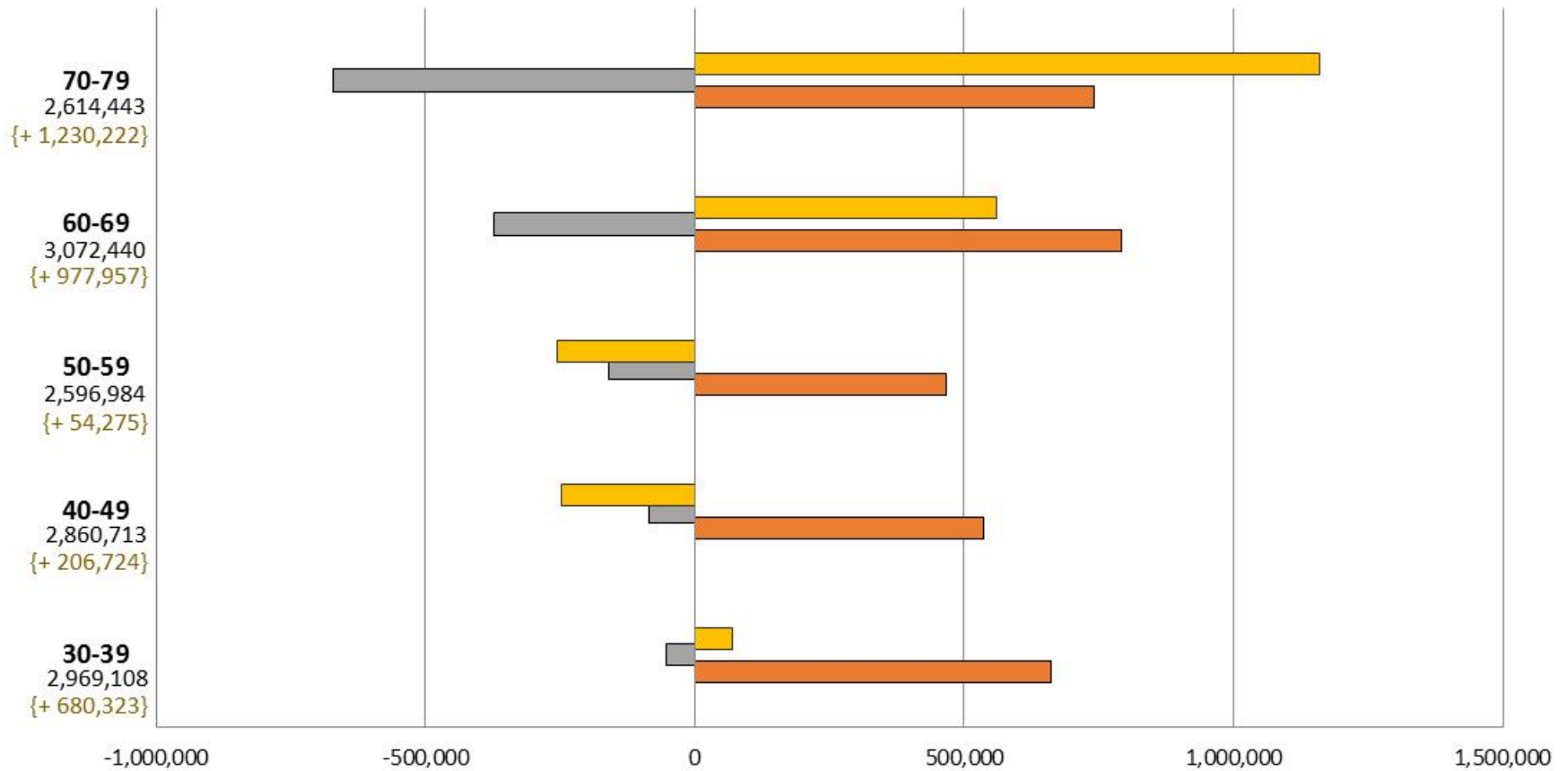
Population Growth by Age Group



- Between 2010 and 2030, Florida's population is forecast to grow by almost 4.8 million.
- Florida's older population (age 60 and older) will account for most of Florida's population growth, representing 56.9 percent of the gains.
- Florida's younger population (age 0-17) will account for 13.8 percent of the gains.



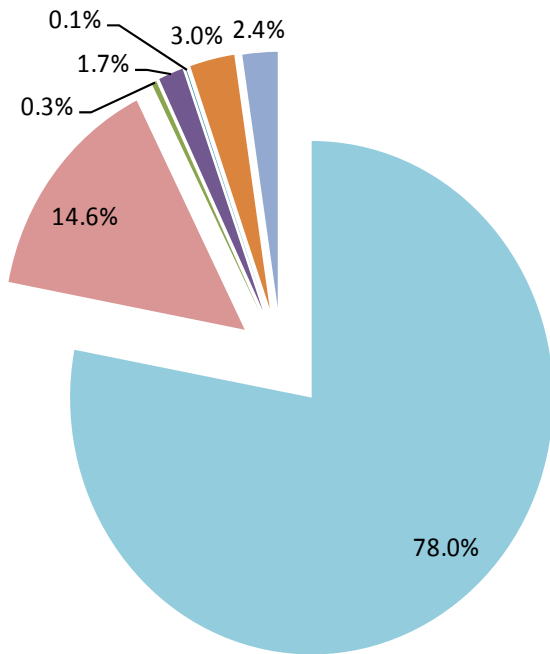
Component Change in Age Group Size in 2030 Relative to 2010



	30-39	40-49	50-59	60-69	70-79
■ resident cohort	70,444	-246,004	-253,924	559,506	1,158,488
■ deaths	-51,496	-83,853	-158,924	-373,620	-670,709
■ migration	661,375	536,581	467,123	792,071	742,443

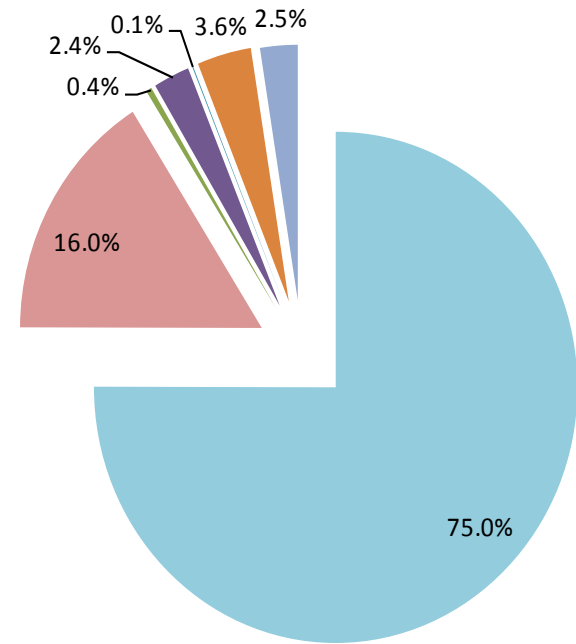
The change in population is a net number. The future senior population will be composed of not just the Floridians aging in place who are here today (minus people who move and deaths), but also the people who have yet to move to Florida.

Population by Race



2000

- White (alone)
- Black or African American (alone)
- American Indian and Alaska Native (alone)
- Asian (alone)
- Native Hawaiian and Other Pacific Islander (alone)
- Some Other Race (alone)
- Two or More Races

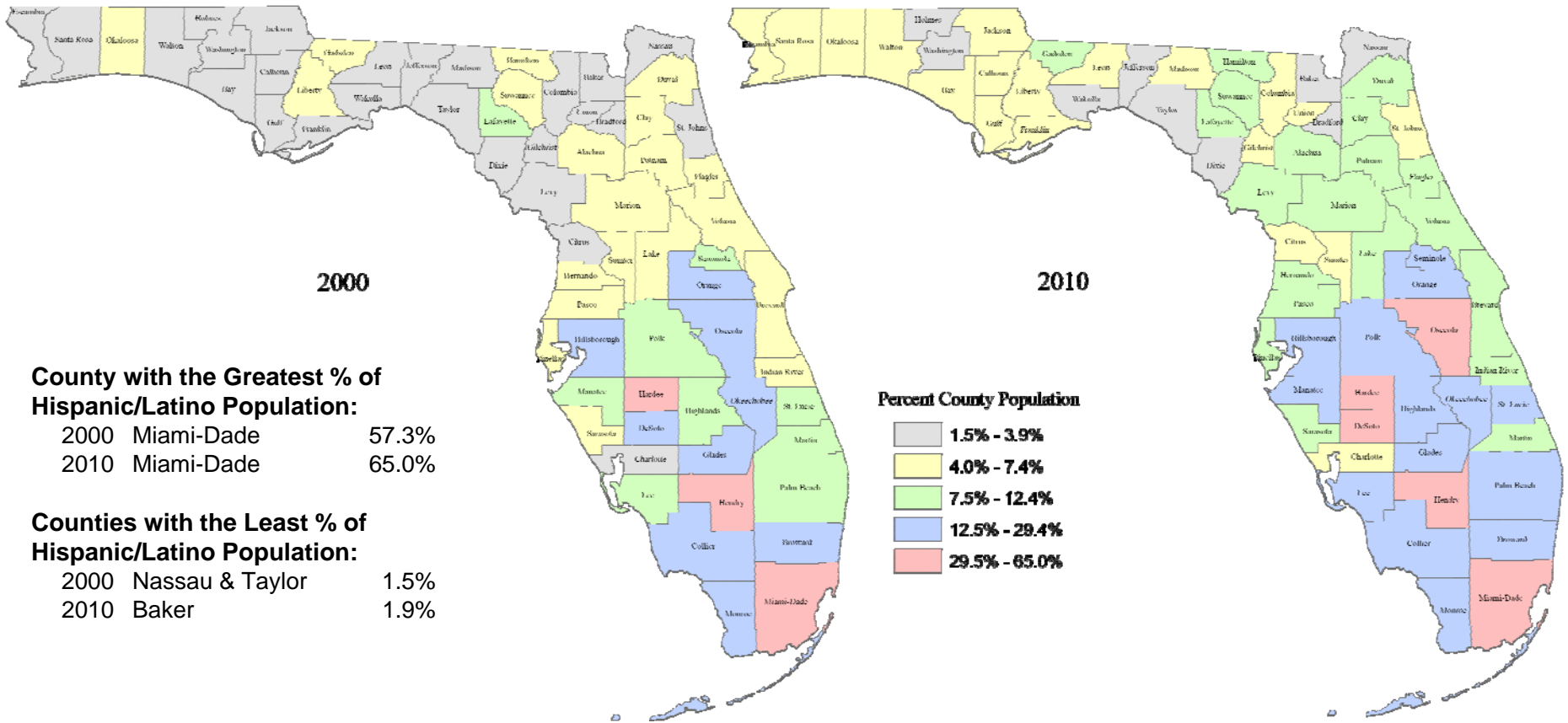


2010



Florida's minority percentage (which includes Hispanics) of the population is 42.1% --- New York is now at 41.7%, and the nation as a whole is at 36.3%.

Hispanic/Latino Population by County

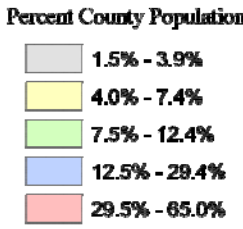


2000

2010

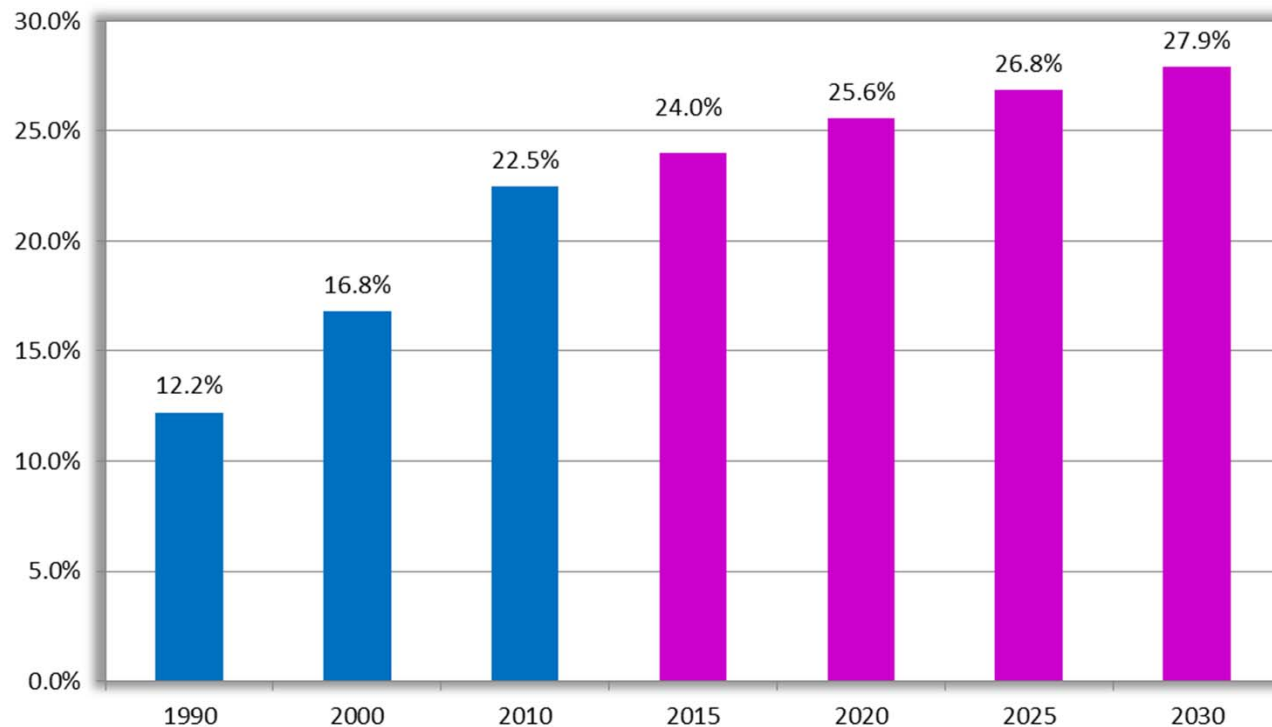
County with the Greatest % of Hispanic/Latino Population:
 2000 Miami-Dade 57.3%
 2010 Miami-Dade 65.0%

Counties with the Least % of Hispanic/Latino Population:
 2000 Nassau & Taylor 1.5%
 2010 Baker 1.9%



Statewide Percentages:
 2000 = 16.8%
 2010 = 22.5%

Florida's Hispanic Population



- Based on the 2010 Census, Hispanics represent about 22.5 percent of Florida's population.
- By 2030, Hispanics are forecast to represent almost 28 percent of Florida's population.

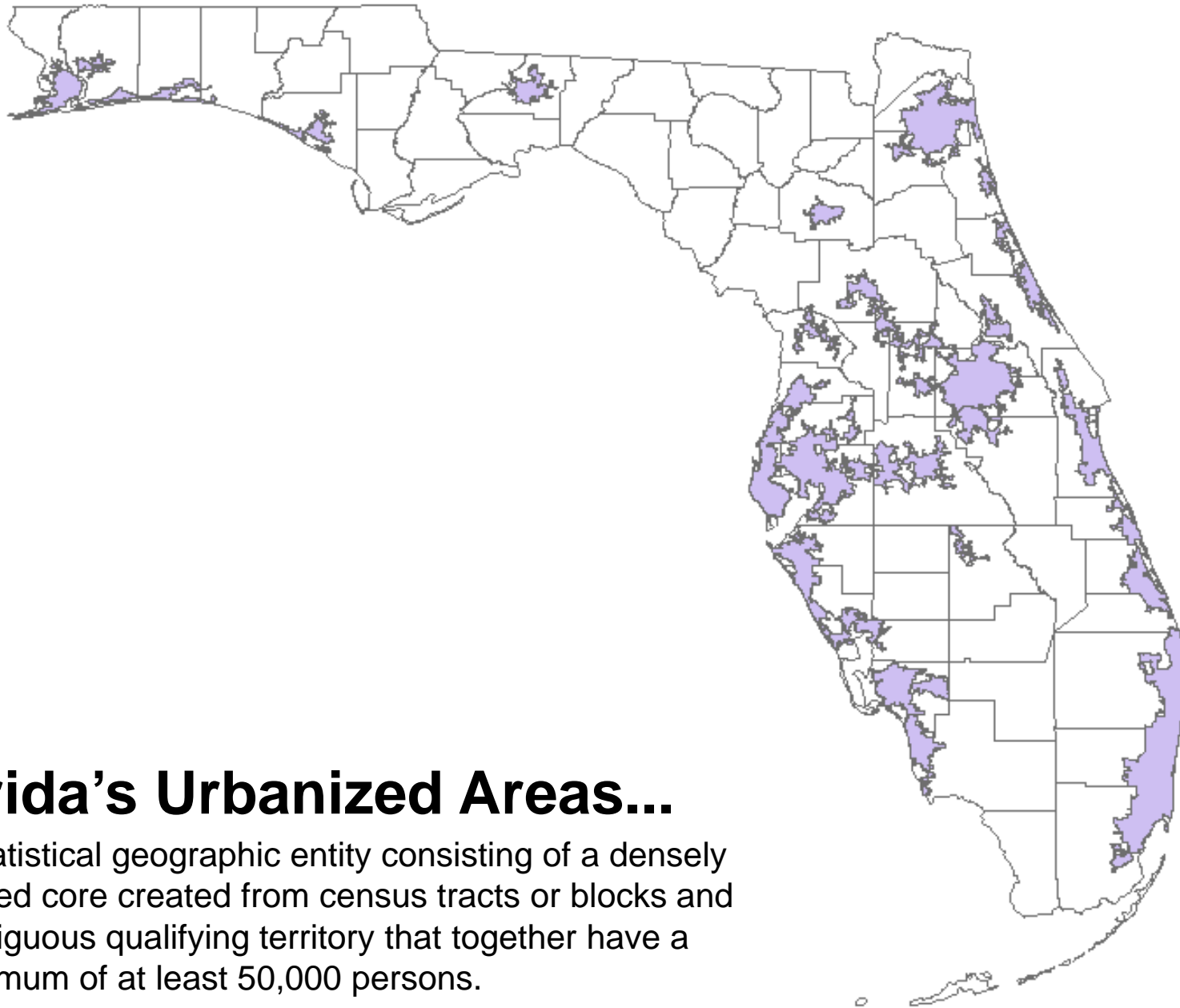


Language and Foreign Born

Language Spoken at Home	Estimate
Population 5 years and over	18,247,223
English only	13,156,749
Language other than English	5,090,474
Speak English less than "very well"	41.4%
Spanish or Spanish Creole	3,733,476
Speak English less than "very well"	43.0%
Other Indo-European languages	960,096
Speak English less than "very well"	36.2%
Asian and Pacific Islander languages	284,245
Speak English less than "very well"	43.6%
Other languages	112,657
Speak English less than "very well"	26.5%

- In 2012, 5 million Floridians (age 5 or older) spoke a language other than English at home, of which about 2.1 million spoke English less than “very well”. If this relationship continues, by 2030, around 6.2 million Floridians (age 5 or older) will speak a language other than English at home, of which about 2.6 million will speak English less than “very well”.
- In 2012, 19.4% of Florida’s population was foreign born.

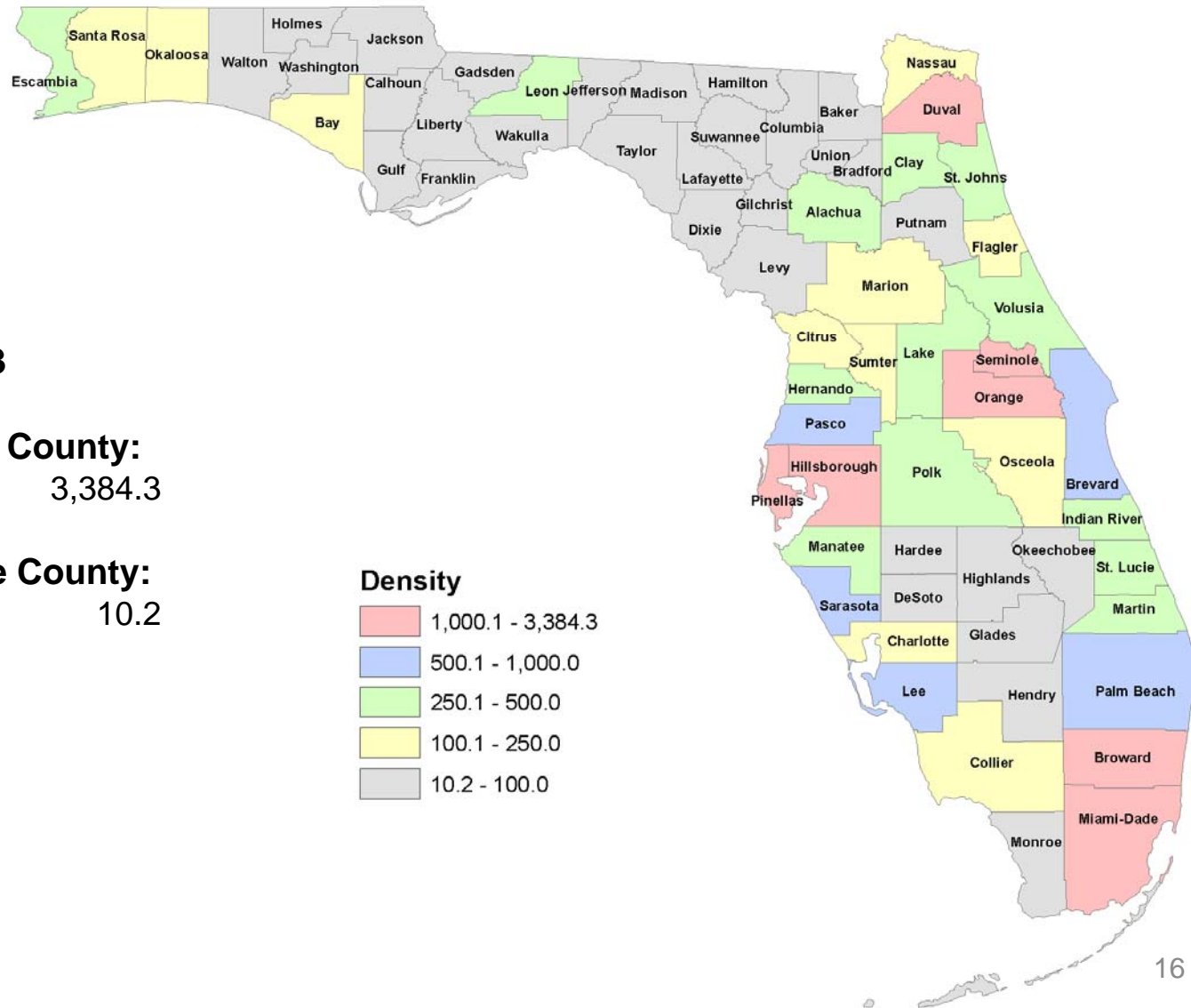




Florida's Urbanized Areas...

A statistical geographic entity consisting of a densely settled core created from census tracts or blocks and contiguous qualifying territory that together have a minimum of at least 50,000 persons.

Population Density



April 1, 2013

Most Dense County:

Pinellas 3,384.3

Least Dense County:

Liberty 10.2



Florida's County Population

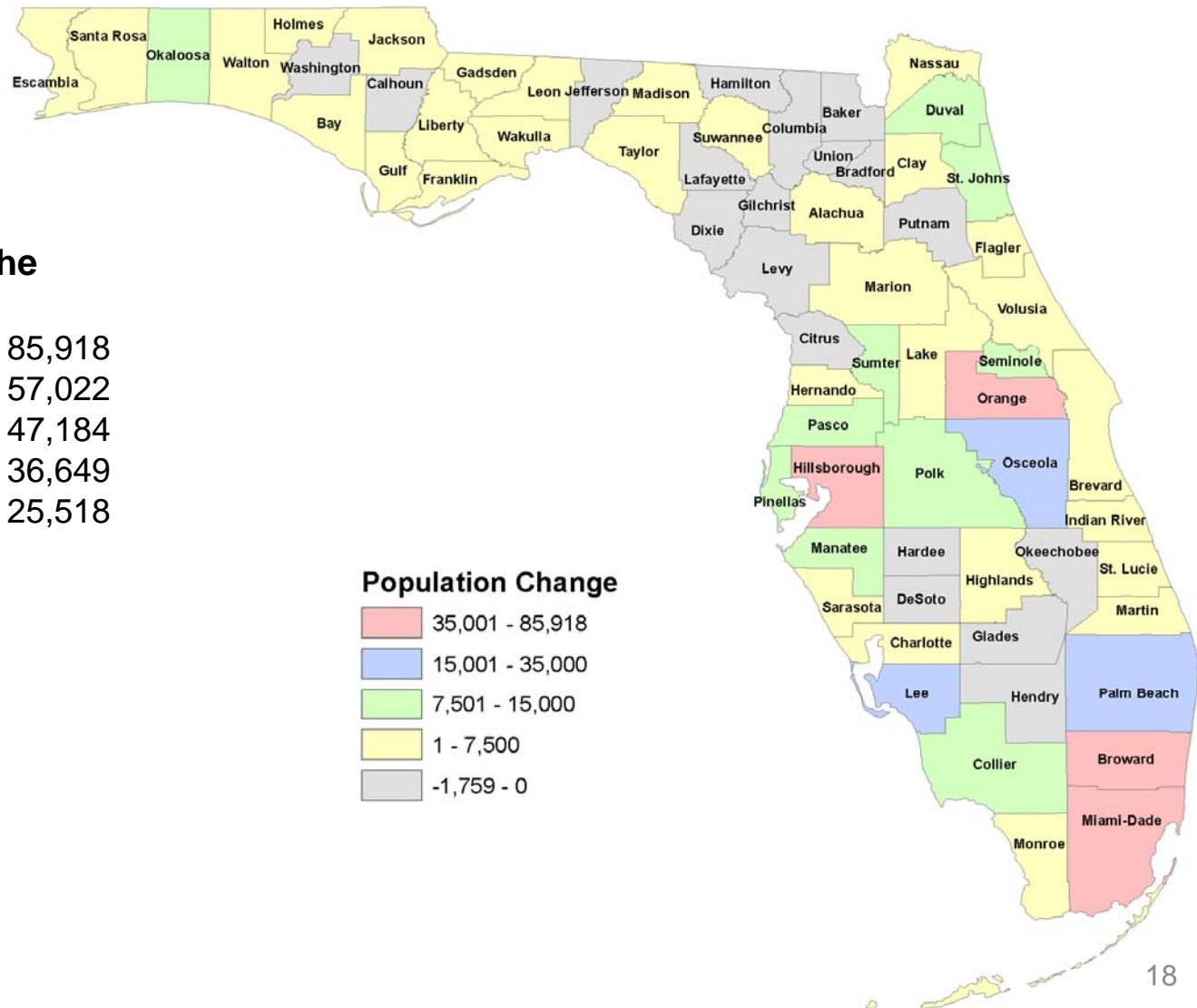
- 33 of Florida's 67 counties have a population of less than 100,000.
- The top 7 counties make up 51.9% of Florida's total population.

April 1, 2013 Population	Number of Florida Counties
One million or more	5
500,000 to 999,999	5
250,000 to 499,999	12
100,000 to 249,999	12
50,000 to 99,999	8
Under 50,000	25



Population Growth

(April 1, 2010 – April 1, 2013)



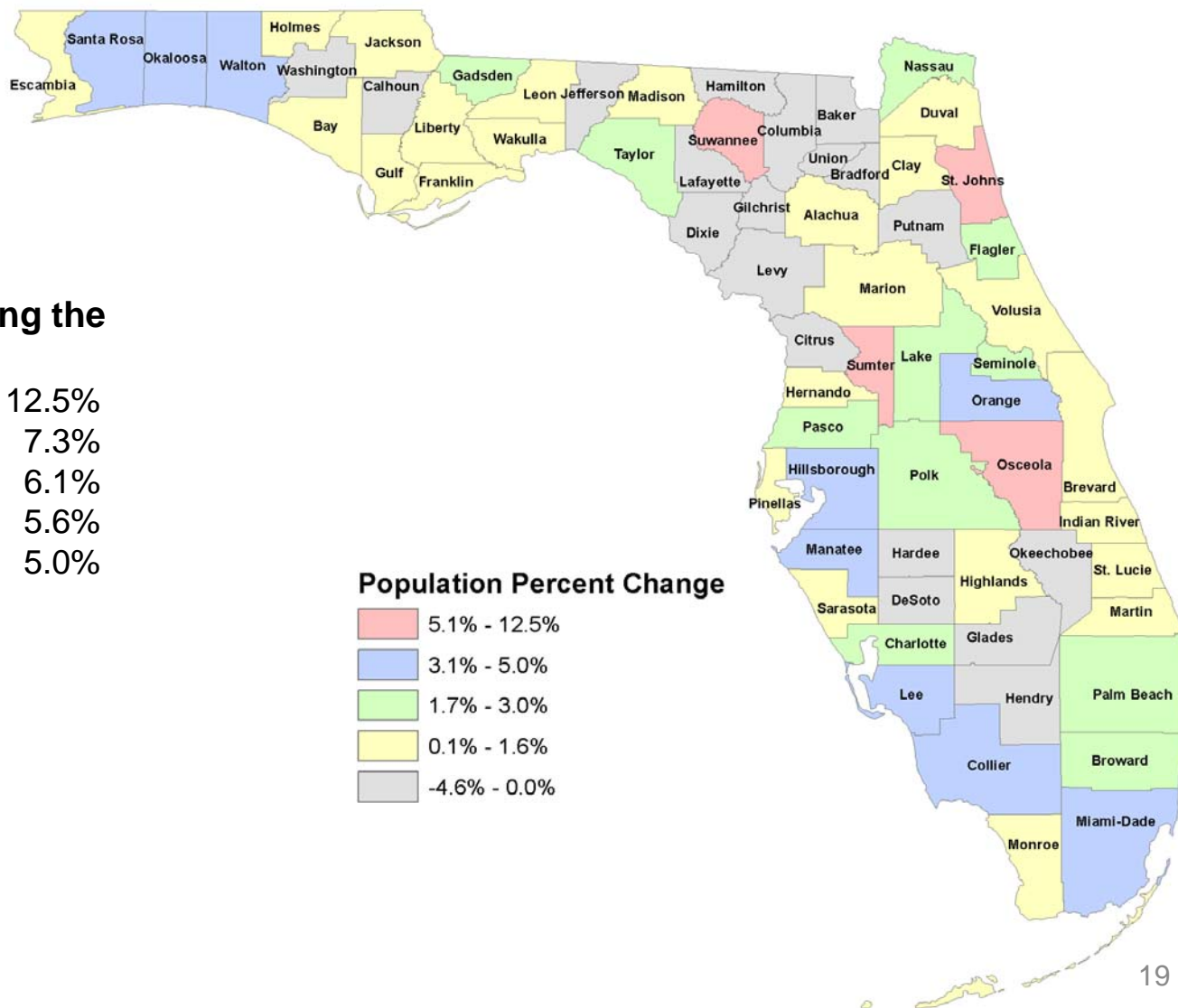
Counties Gaining the Most Population:

Miami-Dade	85,918
Orange	57,022
Hillsborough	47,184
Broward	36,649
Palm Beach	25,518



Population Growth Rate

(April 1, 2010 – April 1, 2013)



Counties Growing the Fastest:

Sumter	12.5%
Osceola	7.3%
St. Johns	6.1%
Suwannee	5.6%
Orange	5.0%

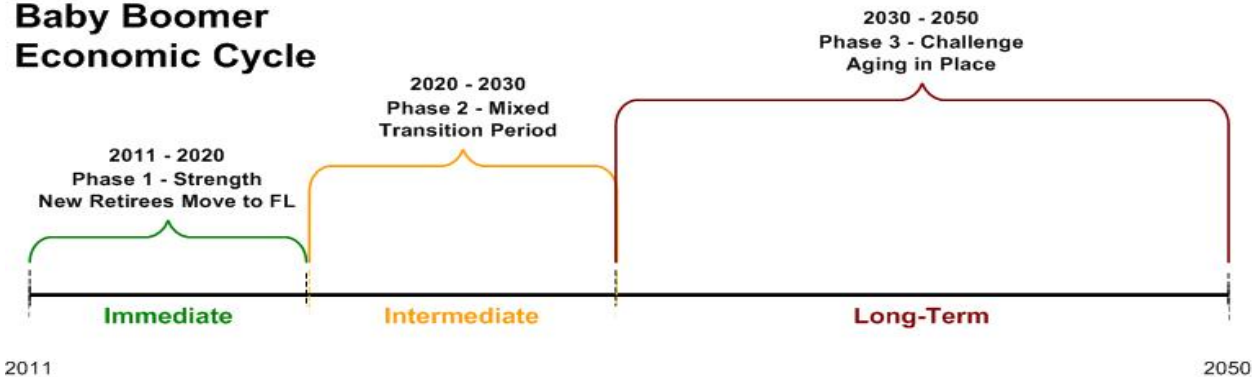


Florida Faces Dual Challenges While Becoming More Diversified and Urbanized...

- **Aging State** – More intense in Florida than elsewhere due to the population share garnered by this population (over 24.1 percent in 2030).
- **Growing State** – all of the same problems as we've had in the past, only more so:
 - Greater Need for Services.
 - Allocation of Increasingly Scarce Natural Resources (especially water).
 - Provision of Needed Infrastructure (new and replacement).



Baby Boomer Economic Cycle



OVER THE SHORTER-TERM ... (between now and 2020)

The Baby Boomers retiring to Florida will generally be financially better off than the average retiree; most will come with assets (at least from the sale of their homes).

Many will buy new homes in Florida and then outfit them --- generating additional tax revenues, largely as a result new money coming in to Florida from outside the state (earned elsewhere). New infusion of dollars has the greatest multiplier effect.

They will also tend to be younger retirees, and therefore healthier and more active --- meaning their demand for consumer services will be higher, strengthening the economy, while their demand for government services will be at its minimum.

OVER THE LONGER-TERM ... (between now and 2030)

As the Baby Boomers retire, they will be leaving vacant more jobs than there are workers to fill them.

The ability to create new jobs will be constrained by the numbers of qualified workers available to fill those jobs.

Both of these factors will lead to increased demand for workers and upward pressure on wages as the skilled supply of workers fails to keep pace with the demand.

Inflated wages will hurt economic growth, as well as make government services more costly to provide—just as the Boomers increase their need for government-supported services.

The increased cost of government services (due to higher prices and larger caseloads) and suppressed economic growth will make budget gaps worsen (diminished revenues and higher costs for the same services and more services being demanded). This situation will be exacerbated by the fact that retirees tend to spend more on services and less on taxable goods.



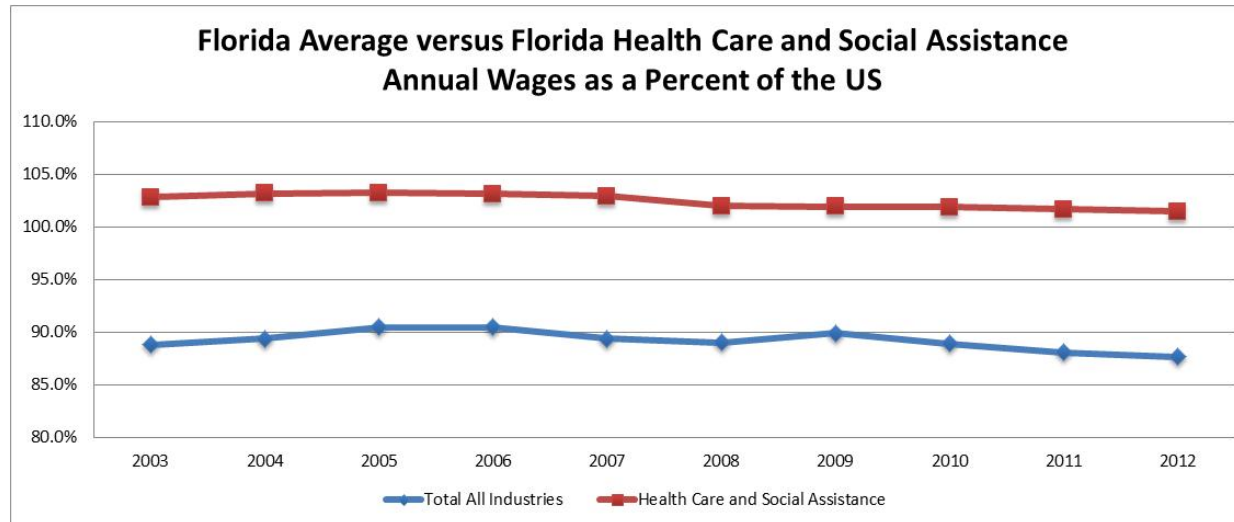
Health Care Workers

Industry Sector	2012			2030	2012-2030
	Employment	Distribution	Employment Per 1,000 Population	Employment Based on 2012 Employment Per 1,000 Population	Change in Employment
Total, All Industries	7,340,519		384	9,085,148	1,744,629
Natural Resources and Mining	86,600	1.2%	5	107,182	20,582
Construction	342,047	4.7%	18	423,342	81,295
Manufacturing	316,698	4.3%	17	391,968	75,270
Trade, Transportation, and Utilities	1,531,578	20.9%	80	1,895,590	364,012
Information	133,733	1.8%	7	165,517	31,784
Financial Activities	493,186	6.7%	26	610,402	117,216
Professional and Business Services	1,073,912	14.6%	56	1,329,150	255,238
Education and Health Services	1,094,785	14.9%	57	1,354,984	260,199
<i>Educational Services</i>	133,468	1.8%	7	165,189	31,721
<i>Health Care and Social Assistance</i>	961,317	13.1%	50	1,189,794	228,477
Leisure and Hospitality	997,364	13.6%	52	1,234,409	237,045
Other Services	237,855	3.2%	12	294,386	56,531
Government	1,028,853	14.0%	54	1,273,382	244,529

The per capita need for additional workers in 2030 is a minimum or “at least as” number:

- Retiring Baby Boomers will present significant replacement challenges to maintaining the existing size of the healthcare workforce.
- The demographic shift caused by the aging population will introduce a greater demand for health care services (more chronic problems and age-related disabilities, coupled with an increasing array of new services, procedures and drugs that prolong life).
- The Affordable Care Act increases the need for health care workers, and its impact isn't in the 2012 data.

FLORIDA AVERAGE ANNUAL WAGES AS A PERCENT OF THE U.S.



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total All Industries	88.8%	89.4%	90.5%	90.5%	89.4%	89.0%	89.9%	88.9%	88.1%	87.7%
Total Private	87.8%	88.0%	89.1%	89.1%	87.8%	87.3%	88.3%	87.3%	86.5%	86.3%
Agriculture, Forestry, Fishing and Hunting	88.4%	91.7%	91.9%	94.2%	89.4%	85.8%	82.7%	85.6%	86.0%	87.8%
Mining, Quarrying, and Oil and Gas Extraction	73.8%	70.4%	68.2%	69.0%	69.3%	64.2%	64.0%	64.4%	62.7%	69.4%
Utilities	93.1%	90.8%	89.0%	82.8%	81.9%	86.5%	90.0%	88.1%	88.6%	87.8%
Construction	89.3%	90.5%	91.0%	91.6%	89.0%	85.7%	84.1%	82.8%	80.6%	79.4%
Manufacturing	89.1%	88.7%	88.1%	88.9%	88.7%	89.4%	91.3%	90.1%	88.5%	88.1%
Wholesale Trade	94.3%	94.5%	95.5%	96.3%	94.5%	94.4%	94.8%	95.3%	95.4%	95.6%
Retail Trade	100.7%	101.7%	103.6%	103.8%	101.5%	100.8%	101.8%	100.9%	99.9%	99.2%
Transportation and Warehousing	95.0%	95.3%	96.2%	97.2%	96.4%	97.0%	98.9%	99.2%	98.5%	97.5%
Information	81.8%	84.0%	84.1%	83.4%	82.3%	82.2%	82.9%	82.7%	82.4%	81.4%
Finance and Insurance	82.5%	80.1%	80.7%	78.5%	75.9%	75.2%	78.9%	77.7%	77.5%	77.8%
Real Estate and Rental and Leasing	95.8%	96.0%	99.1%	94.6%	91.8%	89.3%	90.0%	88.8%	87.9%	86.1%
Professional and Technical Services	84.1%	84.7%	85.3%	85.9%	84.8%	84.1%	84.0%	82.3%	81.7%	81.4%
Management of Companies and Enterprises	91.3%	89.1%	94.3%	94.0%	93.2%	87.3%	90.0%	89.4%	89.2%	94.9%
Administrative and Waste Services	94.4%	94.8%	96.8%	97.2%	95.3%	94.7%	95.9%	95.4%	95.7%	95.1%
Educational Services	86.4%	87.9%	88.1%	88.9%	89.1%	88.2%	87.8%	87.2%	88.6%	86.9%
Health Care and Social Assistance	102.8%	103.2%	103.3%	103.2%	102.9%	102.0%	102.0%	101.9%	101.7%	101.5%
Arts, Entertainment, and Recreation	103.7%	104.8%	104.6%	102.0%	101.9%	103.2%	101.6%	101.1%	100.1%	100.7%
Accommodation and Food Services	107.4%	108.3%	111.4%	111.8%	111.5%	109.7%	108.9%	108.7%	108.7%	108.6%
Other Services, except Public Administration	96.7%	98.1%	99.6%	100.2%	99.7%	99.3%	101.9%	100.9%	99.6%	100.9%
Total Government	95.5%	98.3%	99.2%	99.3%	99.4%	99.7%	99.6%	98.3%	97.2%	96.3%

Long-Term Workforce Trends

- The ratio of workers to retirees will fall as baby boomers age:
 - US today, 4:1
 - FL today, 3:1
 - FL in 2030, 2:1
- Pool of workers will shrink: new retirees will not be fully replaced by younger workers.
 - Worker shortages (especially among highly educated and skilled) will become the norm.
 - Labor-intensive jobs (firefighters, police, construction) will be harder to fill.
 - Wages will face upward pressure to attract skilled-workers from other areas.

