Regional Competitiveness Report Methodology

The annual Regional Competitiveness Report (RCR) is a data-based assessment of Tampa Bay's strengths and weaknesses across a diverse set of indicators, measuring our performance against 19 benchmark communities nationwide.

The drivers of our regional economy – identified as Economic Vitality, Innovation, Infrastructure, Talent and Civic Quality - represent the critical needs of our residents and businesses. Together, they create a framework for prosperity and lead to Outcomes that indicate whether our economy is growing, and if that growth is being enjoyed by everyone.

The following Indicators are tracked annually, where data is available, from the following respective sources:

CIVIC QUALITY	
Cultural & Recreational Establishments per 10,000 Residents	U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, NAICS-Based Data Files, CSVs by Industry, Annual Averages
Affordability: Housing + Transportation Expenditures as a Percentage of Income	ESRI Business Analyst, Household Budget Expenditures
Affordability: Housing Expenditures as a Percentage of Income	ESRI Business Analyst, Household Budget Expenditures
Affordability: Transportation Expenditures as a Percentage of Income	ESRI Business Analyst, Household Budget Expenditures
Food Insecurity Rate	Feeding America, Map the Meal Gap
Share of Children in Foster Care	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S0901
Health Insurance Coverage Rate	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S2701
Median Daily Air Quality Index	Environmental Protection Agency, Air Quality Index Report
Mental Health Providers per 10,000 Residents	County Health Rankings & Roadmaps
Primary Care Physicians per 10,000 Residents	County Health Rankings & Roadmaps
Total Crime Index	ESRI Business Analyst, Crime Summary Report
Violent Crime Index	ESRI Business Analyst, Crime Summary Report

ECONOMIC VITALITY

Average Wage	U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Annual Data
Average Wage Service Sector	U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Annual Data
Job Growth Rate	U.S. Bureau of Labor Statistics, Current Employment Survey, Total Non-Farm Employment
Advanced Industry Gross Regional Product (GRP) Growth Rate	Lightcast, Labor Market Information
Share of Advanced Industry Jobs	Lightcast, Labor Market Information
Business Establishment Start Rate	U.S. Census Bureau, ECNSVY Business Dynamics Statistics
Merchandise Exports Growth Rate	U.S. Department of Commerce, International Trade Administration, TradeStats Express
Existing Home Sales Price Growth Rate	Redfin Research, Monthly Housing Market Data
Average Household Income Lowest Quintile	U.S. Census Bureau, American Community Survey, 1-Year Estimates, B19081/ S1903
Median Household Income	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S1903
Median Household Net Worth	ESRI Business Analyst, Median Net Worth Profile

INFRASTRUCTURE

Average Commute Time (Minutes)	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S0801
Share of Commuters with 1+ Hour Commutes	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S0801
Annual Hours Lost in Congestion	INRIX, Global Traffic Scorecard
Share of Pavement Condition Rated Fair or Good	TRIP
Pedestrian and Cyclist Fatalities per 100,000 Residents	National Highway Traffic Safety Administration, Fatality Analysis Reporting System
Transit Vehicle Revenue Miles per Capita	Federal Transit Administration, National Transit Database, UZA Sums
Transit Ridership per Capita	Federal Transit Administration, National Transit Database, UZA Sums
Airline Passenger Growth Rate	Federal Aviation Administration, Air Carrier Activity Information System
Share of Households with Computer and Dedicated Broadband Internet Access	U.S. Census Bureau, American Community Survey, 1-Year Estimates, B28008
Share of Residents Living in a Walkable Neighborhood	*Discontinued as of the 2026 report.*

INNOVATION

Patents per 10,000 Residents	U.S. Patent and Trademark Office, PatentsView Database
SBIR/STTR Awards per Capita	Small Business Administration, Award Database
University Research & Development Expenditures ($000)	National Science Foundation, Higher Education Research and Development Survey
University Technology Licensing Income	AUTM, Statistics Access for Technology Transfer Database

OUTCOMES

Net Migration Rate	U.S. Census Bureau, Population Estimates Program, Annual Estimates
In-Migration Rate Ages 25-34	U.S. Census Bureau, American Community Survey, 1-Year Estimates, Public Use Microdata Sample
Gross Regional Product (GRP) per Capita	U.S. Bureau of Economic Analysis, Regional Data, Real GDP in Chained Dollars
Gross Regional Product (GRP) Growth Rate	U.S. Bureau of Economic Analysis, Regional Data, Real GDP in Chained Dollars
Financial Instability Rate: ALICE + Poverty	United Way, United for ALICE
Poverty Rate	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S1701
Youth Poverty Rate	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S1701
Full-Time Worker Poverty Rate	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S1701
Unemployment Rate Ages 25-64	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S2301

TALENT

Share of 3 & 4-Year Olds Enrolled in School	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S1401
Share of Population Ages 16-24 Neither Employed nor Enrolled in School	U.S. Census Bureau, American Community Survey, 1-Year Estimates, Public Use Microdata Sample
Certificate Production per 10,000 Residents	National Center for Education Statistics, Integrated Postsecondary Education Data System
Degree Production per 10,000 Residents: AA/AS+	National Center for Education Statistics, Integrated Postsecondary Education Data System
STEM Degree Production per 10,000 Residents	National Center for Education Statistics, Integrated Postsecondary Education Data System
Educational Attainment Rate Ages 25-34: BA/BS+	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S1501
Educational Attainment Rate: AA/AS+	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S1501
Educational Attainment Rate: BA/BS+	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S1501
Educational Attainment Rate: Graduate/ Professional	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S1501
High School Graduation Rate	State Departments of Education
High School Graduation Rate: Economically Disadvantaged	State Departments of Education
Labor Force Participation Rate Ages 25-64	U.S. Census Bureau, American Community Survey, 1-Year Estimates, S2301

Talent is further sub-divided into **Florida Talent Indicators (FTI)**, *measuring only across the State of Florida, given the nature of the data.*

Florida Talent Indicators: Kindergarten Readiness	Florida Department of Education, Florida Assessment of Student Thinking, Star Early Literacy
Florida Talent Indicators: English Language Arts Third Grade Reading	Florida Department of Education, Know Your Data Advanced Reports Portal
Florida Talent Indicators: Math Third and Eighth Grades	Florida Department of Education, Know Your Data Advanced Reports Portal
Florida Talent Indicators: Science Fifth and Eighth Grades	Florida Department of Education, Know Your Data Advanced Reports Portal
Florida Talent Indicators: Algebra I EOC	Florida Department of Education, Know Your Data Advanced Reports Portal
Florida Talent Indicators: Biology I EOC	Florida Department of Education, Know Your Data Advanced Reports Portal
Florida Talent Indicators: AP Passing Rate	Florida Department of Education, Office of Accountability and Policy Research
Florida Talent Indicators: AP Testing Rate	Florida Department of Education, Office of Accountability and Policy Research
Florida Talent Indicators: SAT Scores	Florida Department of Education, Office of Accountability and Policy Research

The Tampa Bay value is comprised of four Core Based Statistical Areas (CBSAs), or "metros", including: Tampa-St. Petersburg-Clearwater (Hernando, Hillsborough, Pasco and Pinellas counties), Homosassa Springs (Citrus County), Lakeland-Winter Haven (Polk County, and North Port-Sarasota-Bradenton (Manatee and Sarasota counties).

In instances where we combine county-level or metro-level data to create the regional value, we do so by weighting the component values by an appropriate factor (population, number of households, etc.). It should be noted that, in most instances, the Tampa Bay regional value remains close to the value of the Tampa-St. Petersburg-Clearwater metro.

Raleigh-Durham is found by aggregating and weighting Raleigh, NC and Durham-Chapel Hill, NC.

The following Core Based Statistical Areas (CBSAs) are analyzed as part of the RCR. We analyze based on CBSA code rather than by metro name, where possible. When delineations are updated for the counties encompassing these CBSAs, adjustments are made to incorporate the new delineations. Delineations are updated with each decennial Census. Population estimates, where needed for the calculations, are derived either from the original data source, or from the Census Bureau's Population Estimates Program.

12060	Atlanta, GA
12420	Austin, TX
12580	Baltimore, MD
16740	Charlotte, NC-SC
19100	Dallas-Fort Worth, TX
19740	Denver, CO
20500	Durham-Chapel Hill, NC
26140	Homosassa Springs, FL
26420	Houston, TX
27260	Jacksonville, FL
29460	Lakeland-Winter Haven, FL
33100	Miami-Fort Lauderdale-West Palm, FL
33460	Minneapolis-St. Paul, MN-WI

34980	Nashville, TN
35840	North Port-Sarasota-Bradenton, FL
36740	Orlando, FL
38060	Phoenix, AZ
38900	Portland, OR-WA
39580	Raleigh, NC
41700	San Antonio, TX
41740	San Diego, CA
42660	Seattle, WA
41180	St. Louis, MO-IL
45300	Tampa-St. Petersburg-Clearwater, FL

Where available, 1-year estimates are used for values that rely on U.S. Census Bureau, American Community Survey data. However, at the county-level, some data is only available in 5-year estimates. When this is the case, 5-year estimates are used in place of 1-year estimates.

Rates are often expressed as per capita, per 10,000 residents, or per 100,000 residents for ease of comparison across counties or CBSAs.

The notes that follow are for only select indicators where the methodology may warrant further explanation. Contact information for the research team is listed at the end of this document.

Civic Quality:

For the three Affordability indicators, ESRI Business Analyst, Household Budget Expenditures are used. Consumer Spending data is derived from the Consumer Expenditure Surveys, Bureau of Labor Statistics. **Affordability: Housing + Transportation Expenditures as a Percentage of Income** is computed by aggregating housing and transportation spending as a percentage of household income. Housing expenditures include spending indices on shelter (to include owned dwellings and mortgage/loan costs, property taxes, and homeowner's insurance; as well as rents and tenant insurance), utilities, fuel, public services, and maintenance/repair expenses. Transportation expenditures include spending indices on payments on vehicles, leases, gasoline and motor oil, maintenance and repairs, vehicle insurance, driver's license fees, registrations, and inspection fees, as well as parking and tolls. Public transportation, intracity mass transit, and taxi fares are also included.

Cultural and Recreational Establishments are obtained from the Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages (QCEW). The value represents the annual average count of private establishments that fall under NAICS code 71, Arts, Entertainment, and Recreation. The counts reflect the number of physical worksites, as one company may have several worksites.

Median Daily Air Quality Index (AQI) is the median value of all available daily readings for the Criteria Gases: carbon monoxide (CO), lead (Pb), ground-level ozone (O_3), particulate matter (PM10 and PM2.5), nitrogen dioxide (NO_2), and sulfur dioxide (SO_2). The AQI runs from 0 to 500, with a higher number reflecting a greater health concern. The EPA sets the national air quality standard at 100, a level set to protect public health. AQI values below 100 are generally thought of as satisfactory.

The Total Crime Index and the Violent (Personal) Crime Index are obtained from ESRI Business Analyst, Crime Summary Report. They are measures of the relative risk of a crime occurring. The Total Crime Index is composed of 7 major crimes, including burglary, larceny, motor vehicle theft, assault, robbery, rape, and murder. The last four crimes fall under the violent crime category. These estimates are measured against the overall risk at a national level, set at a value of 100. A value above 100 indicates above average risk and below 100 indicates below average risk compared to the national average.

Updated data for this indicator were not available at the time of production for the 2026 RCR. Therefore, values shown reflect those reported in the 2025 RCR.

Primary Care Physician (PCP) and Mental Health Provider (MHP) data is obtained from County Health Rankings & Roadmaps, a program of the University of Wisconsin Population Health Institute. Their data sources include Area Health Resource File from the U.S. Department of Health & Human Services, American Medical Association (AMA) and Centers for Medicare & Medicaid Services (CMS), National Provider Identification. The number of PCPs and MHPs is aggregated for the counties within a CBSA, and then calculated as a share of the population. Given that the data year for PCPs and MHPs may differ within the dataset, the population numbers associated with those datasets are used.

Economic Vitality:

Annual **Average Wages in the Service Sector** are obtained from the Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages (QCEW). The service sector includes NAICS 44-45, Retail Trade, and NAICS 1026, Leisure and Hospitality. Data for Retail Trade in the Denver-Aurora-Lakewood metro area is not publicly disclosed due to the Confidentiality and Data Disclosure policies of QCEW and BLS. Therefore, the Denver metro values only reflect the leisure and hospitality industries. Like Average Wage, these are nominal wages, which are not adjusted for inflation.

Job Growth Rate is computed as the June year-over-year change in total nonfarm employment. These figures are not seasonally adjusted.

Advanced Industry Gross Regional Product (GRP) Growth Rate and the Share of Advanced Industry Jobs is obtained from Lightcast, Labor Market Information. Lightcast relies on its own internal modeling on data from the Census Bureau's Current Population Survey and the American Community Survey, as well as the Bureau of Economic Analysis' National Income and Product Accounts, State and Local Personal Income reports, Input-Output Make and Use Tables, and Gross State Product data. The Bureau of Labor Statistics' QCEW and National Industry-Occupation Employment Matrix (NIOEM) is supplemented with County Business Patterns, Current Employment Statistics. Advanced industries are characterized by high levels of technology research and development (R&D) and STEM (science, technology, engineering, and math) workers. According to the **Brookings Institution**, "the sector encompasses 50 industries ranging from manufacturing industries such as auto-making and aerospace to energy industries such as oil

and gas extraction to high-tech services such as computer software and computer system design, including for health applications." The following NAICS codes are used: 621, 515, 325, 518, 339, 519, 541, 517, 336.

Merchandise Exports Growth Rate is computed as the year-over-year change in the dollar value of merchandise exports, using the U.S. Department of Commerce, International Trade Administration's Metropolitan Export Series. It is a measures merchandise (goods) exports only. The data is based on the Origin of Movement – Zip Code Based series, which assigns exports to the location of the U.S. Principal Party in Interest (USPPI) regardless of where the good leaves the country. For example, a good with a USPPI in Chicago will be attributed to Chicago, even if the good left the country from the port of Miami. The USPPI is the person in the U.S. that receives the primary benefits (typically monetary) of the export transaction.

The 2026 RCR utilized 2023–2024 data, the most recently available source data at the time of publication. As a result, a data year was skipped between report cycles. The 2025 RCR utilized 2021–2022 data, and 2022–2023 data were not included.

Existing Home Sales Price Growth Rate is computed as the June year-over-year change in the median sale price of existing homes. Monthly median sale prices of existing homes are reported by Redfin Research by metro area. Often these metro areas do not perfectly align with the U.S. Census Bureau's delineations of CBSAs. Where this occurs, metro areas are aggregated and weighted by the number of home sales to derive the closest possible estimate to the U.S. Census Bureau's delineations. For example, the Tampa, North Port, Homosassa Springs, and Lakeland metros are aggregated and weighted to derive the Tampa Bay metro area.

Business Establishment Start Rate reflects the establishment entry rate, based on the Business Dynamics Statistics, **BDS codebook**. For Tampa Bay and Raleigh-Durham, several CBSAs were combined, and the entry rate is computed by following the **BDS** recommended methodology: Establishment entry rates are defined as the count of establishment entrants in year t divided by the average count of employment active establishments in year t and year t-1. In order to ensure that the count of year t establishments are longitudinally consistent with the count in year t-1, the following formula was used: estabs_entry_rate year t= 100*(estabs_entry year t/(0.5*(estabs year t + estabs year t-1)).

Infrastructure:

Airline Passenger Growth Rate relies on the year-over-year change in enplanements at all commercial service airports within a metro area. The Tampa Bay metro area includes Tampa International Airport (TPA), Sarasota Bradenton International Airport (SRQ), and St. Pete-Clearwater International Airport (PIE).

Transit Ridership, which represents Total Unlinked Passenger Trips, and **Transit (Total) Vehicle Revenue Miles** are obtained from the Federal Transit Administration's National Transit Database. Data is available for urbanized areas (UZAs), whose geographical boundaries may differ from metro area designations. UZA boundaries may change as population concentrations change. The latest UZA

designations are used in the RCR calculations. For several of the metros tracked in the RCR, more than one UZA may be aggregated in order to reflect, as closely as possible, the metro area designations. For example, the Tampa Bay metro area for the 2024 RCR includes the following UZAs: Tampa-St. Petersburg (86599), Bradenton-Sarasota-Venice (09536), Lakeland (46828), Winter Haven (96697), Zephyrhills (98182), Beverly Hills-Homosassa Springs-Pine Ridge (07472), and Spring Hill (84024).

Annual Hours Lost in Congestion are calculated from INRIX's Global Traffic Scorecard, which reports congestion across major cities globally. These may not align with CBSA designations; for several metros, including Tampa Bay, more than one city is included and weighted by its population. Based on the cities available in the Global Traffic Scorecard, the Tampa Bay value includes Tampa, Clearwater/St. Petersburg, Lakeland, Winter Haven, Sarasota/Bradenton, and New Port Richey.

Share of Pavement Condition Rated Fair or Good is obtained from TRIP and reflects the combined share of roadway pavement classified as "fair" or "good." The measure is based on TRIP's analysis of the Federal Highway Administration's Urban Pavement Condition data.

Updated data for this indicator were not available at the time of production for the 2026 RCR. Therefore, values shown reflect those reported in the 2025 RCR.

Pedestrian and Cyclist Fatalities is the county sum of all pedestrians and pedalcyclists killed in fatal crashes. The total for each metro area is the sum of all the fatalities in all the counties designated within a respective CBSA, using the latest decennial Census delineations.

Share of Residents Living in a Walkable Neighborhood was discontinued in the 2026 RCR due to data quality concerns and insufficient methodological transparency from Walk Score®. Recent changes to the underlying data and the exclusion of several highly walkable neighborhoods limited the indicator's reliability and comparability over time.

Innovation:

Annual **Patent Awards** are pulled from the state files available from the PatentsView database of the U.S. Patent and Trademark Office. Metro area values are derived from filtering by inventor state and county FIPS, where the counties selected are those designated within a respective CBSA, using the latest decennial Census delineations. For the 2024 RCR, a full U.S. dataset was unavailable from PatentsView, only the state files requested for RCR comparison metros were obtained. Counts are determined by patent number, which are de-duplicated to avoid double counting where more than one inventor may be associated with a given patent award.

Annual **SBIR/STTR Award** data is obtained from the U.S. Small Business Administration. The Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) programs encourage small businesses to engage in Federal Research/Research and Development (R/R&D) with the potential for

commercialization. Awards are filtered by state and addresses are geocoded in ArcGIS to obtain the aggregated award amount within a given CBSA. The per capita value reflects population estimates from the Census Bureau's Population Estimates Program to match the dataset year.

University Research & Development (R&D) Expenditures are compiled by fiscal year from the National Science Foundation's Higher Education Research and Development Survey. A university's physical location is matched to a particular metro area and reported as part of that region's total university R&D expenditures. These values are reported in thousands of dollars.

University Technology Licensing is derived from AUTM's STATT database. Universities are assigned to a metro area based on their physical location. Certain state university systems report as one entity, despite campuses in several distinct metro areas. Only data that is attributable to a specific campus/metro area is included in an RCR metro area. For example, the University of Texas System reports one value for all campuses. Therefore, Houston's value reflects only licensing income from Baylor, Rice, and the University of Houston, but does not include income associated with the University of Texas.

In prior years, the "University Tech Licensing" dataset typically carried a three-year lag; for example, the 2025 report reflected 2022 data. For the 2026 report, 2024 data became available. Consistent with the Partnership's methodology of using the most current available data, one data year (2023) was skipped between report cycles.

Talent:

Note on K-12 Florida Department of Education (FDOE) Assessments: Beginning with the 2022-23 school year, Florida implemented new statewide, standardized assessments in English Language Arts (ELA) and Mathematics: Florida Assessment of Student Thinking (FAST) and updated Algebra I and Geometry end-of-course assessments aligned with the new the Benchmarks in Excellent Student Thinking (B.E.S.T.) content standards. The results from the 2022-23 B.E.S.T. assessments cannot be compared to the former ELA and Mathematics assessments used from 2015-16 through 2021-22 that were aligned with the Florida Standards and reported on a different score scale with different cut scores.

While the RCR reports results across multiple years, caution is recommended when comparing different years using different assessments for growth and gains.

Kindergarten Readiness rates for the 2026 RCR reflect a score of 707 or higher on the Florida Assessment of Student Thinking (FAST) Star Early Literacy (SEL) Assessment given in Fall 2024. Results are based on the first assessment administered to each student (Progress Monitoring 1). Prior to AY 2024-2025, students were considered kindergarten ready with a score of 690 or higher. Prior to AY 2022-2023, the Florida Kindergarten Readiness Screener (FLKRS) Star Early Literacy assessment was administered, with a passing score of 500 or higher.

English Language Arts Third Grade Reading scores reflect the percentage of students earning a level 3 or above on the Florida Assessment of Student Thinking (FAST), aligned with the Benchmarks in Excellent Student Thinking (B.E.S.T.) standards, based on the Progress Monitoring 3 results. Prior to AY 2022-2023, the Florida Standards Assessment (FSA) was administered.

Note from FDOE: For the 2022-2023 school year only, student achievement levels are provisional and are linked to the 2021-2022 reporting scale, as required by law. For 2023-2024 and beyond, scores will be reported on a new scale.

Math Third and Eighth Grade scores reflect the percentage of students earning a level 3 or above on the Florida Assessment of Student Thinking (FAST), aligned with the Benchmarks in Excellent Student Thinking (B.E.S.T.) standards, based on the Progress Monitoring 3 results. Prior to AY 2022-2023, the Florida Standards Assessment (FSA) was administered.

Note from FDOE: For the 2022-2023 school year only, student achievement levels are provisional and are linked to the 2021-2022 reporting scale, as required by law. For 2023-2024 and beyond, scores will be reported on a new scale.

Science Fifth and Eighth Grade scores reflect the percentage of students earning a level 3 or above on the Florida Next Generation Sunshine State Standards (NGSSS).

Biology I End-of-Course (EOC) assessment scores reflect the percentage of students earning a level 3 or above.

Algebra I End-of-Course (EOC) assessment scores reflect the percentage of students earning a level 3 or above. Beginning with AY 2022-2023, this assessment aligns with the Benchmarks in Excellent Student Thinking (B.E.S.T.) standards.

Note from FDOE: For the 2022-2023 school year only, student achievement levels are provisional and are linked to the 2021-2022 reporting scale, as required by law. For 2023-2024 and beyond, scores will be reported on a new scale.

SAT Scores reflect average SAT test scores for students graduating high school in a given academic year, as reported by the College Board as of mid-July after each respective graduating class. For students that may have taken the SAT more than once, the most recent score is reflected.

Certificate and Degree Production data is obtained from the National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS) for a given academic year for each CBSA. The grand totals for first and second majors below and above the baccalaureate level are used.

STEM Degree Production reflects the latest STEM CIP code lists provided by the Department of Homeland Security (DHS), which are updated annually. It is important to note that given these adjustments to what is classified as a STEM degree, each year's value may reflect a slightly different list of degrees. All first and second STEM majors are aggregated for each CBSA using the DHS STEM Designated Degree Program List.

High School Graduation Rates and High School Graduation Rate Economically Disadvantaged are obtained from each respective state's Department of Education. For example, the Florida Department of Education determines graduation rates as the percentage of students who graduated within four years of their initial enrollment in ninth grade. This value does not count deceased students or students who transferred out of the public school system; however, incoming transfer students are included based on their grade level and year of entry. The high school graduation rate of economically disadvantaged students is calculated based on the number of graduates who meet the respective state's definition of economically disadvantaged.

The Share of Population Ages 16-24 Neither Employed nor Enrolled in School (ie Disconnected Youth) is obtained from the American Community Survey (ACS) Public Use Microdata Sample (PUMS). This indicator is calculated using the latest centennial Census designations of Public Use Microdata Areas (PUMAs). The PUMAs within a respective CBSA are identified, and the number of 16- to 24-year-olds in a given metro area is established. Disconnected Youth represents the share of 16- to 24-year-olds not enrolled in school nor at work.

The Labor Force Participation Rate is obtained from the American Community Survey, 1- year estimates of Employment Status. The metro area values reflect 25- to 64-years of age. Labor Force Participation Rates by race/ethnicity, however, are available and reported for ages 16 or older, and by gender are for 20 to 64 years. These values are obtained at the CBSA level but aggregated and weighted for the multiple Tampa Bay and Raleigh-Durham CBSAs.

Outcomes:

The Unemployment Rate is obtained from the American Community Survey, 1- year estimates of Employment Status. The metro area values reflect 25- to 64-years of age. Unemployment rates by race/ethnicity, however, are available and reported for ages 16 or older, and by gender are for 20 to 64 years. These values are obtained at the CBSA level but aggregated and weighted for the multiple Tampa Bay and Raleigh-Durham CBSAs.

The Financial Instability: ALICE + Poverty Rate is obtained from the United Way's United for Alice dataset, which is published every two years. The 2024 RCR value reflects the data in the 2023 United for ALICE report, which rests on 2021 data that included several pandemic-era tax benefits. Without these benefits, many of which have expired, the survival budgets need to be adjusted upwards. For example, a family of 4 with two children in childcare would lose about $10,000 without these tax benefits. County data is used to derive the metro area value of the percentage of

households that fall within the ALICE threshold, to include those living under Federal Poverty Level (FPL). The counties selected are those designated within a respective CBSA, using the latest decennial Census delineations. The final value for a metro area is weighted based on the number of households in each county. The ALICE methodology provides additional information.

The Poverty Rate, Full-time Worker Poverty Rate, and Youth Poverty Rate are all derived from the American Community Survey, 1- year estimates of S1701: Poverty Status in the Past 12 Months. These values are obtained at the CBSA level but aggregated and weighted for the multiple Tampa Bay and Raleigh-Durham CBSAs. Youth Poverty Rate reflects those under 18 years of age. The Full-time worker Poverty Rate reflects those 16 years and over who worked full-time, year-round in the past 12 months.

Gross Regional Product (GRP) per Capita and GRP Growth Rate are obtained from the Bureau of Economic Analysis' (BEA) Regional Data by Metropolitan Statistical Area. The All-industry total is reported in thousands of chained (2017) dollars.

Updated data for this indicator were not available at the time of production for the 2026 RCR. Therefore, values shown reflect those reported in the 2025 RCR.

The Net Migration Rate is the ratio of net migration in a given year relative to the previous year's population estimate. The counties selected are those designated within a respective CBSA, using the latest decennial Census delineations.

The In-Migration Rate Ages 25-34 is obtained from the American Community Survey (ACS) Public Use Microdata Sample (PUMS). This indicator is calculated using the latest designations of Public Use Microdata Areas (PUMAs). The PUMAs within a respective CBSA are identified, and the number of 25- to 34-year-olds in a given metro area is established. Using MigPUMAs, the in-migration rate reflects the number of 25- to 34-year-olds moving into the metro area from both inside and outside the state.

> For more detailed information regarding any of the indicators, please contact Sarah Burgoyne, Senior Director of Research and Public Policy at **sburgoyne@tampabay.org**