

FROM DATA TO ACTION

Over the last 15 years, by presenting reliable and independent data, the Greater Louisville Project has helped shape a shared agenda and a common vocabulary for measuring the impact of our community's civic investments.

GLP's work has contributed to the creation of 55,000 Degrees, the Louisville Health Advisory Board, the Education and Workforce Summit, United Community, Evolve502, and countless other initiatives and programs. GLP reports are frequently cited in media reports, nonprofit board meetings, and civic gatherings as a call to arms and to report on ongoing community needs.

Using comparable data from our peer cities to report our progress (and lack of progress) across four Deep Drivers—Education, Jobs Health, and Quality of Place—GLP has sparked conversations and collaborations across all sectors. By bringing together community leaders, grassroots activists, businesses, and funders around common data, we have brought more focus and accountability to our community's collective efforts.

As a community, Louisville has been regularly recognized by national organizations as diverse as the Robert Wood Johnson Foundation, Governing Magazine, the Kresge Foundation, and many others for its commitment to leveraging data and its ability to recognize and act across sectors to address significant issues.

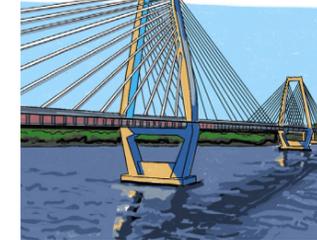
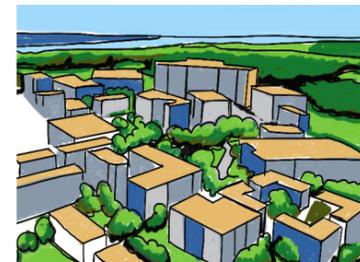
As we look beyond our first 15 years, The Greater Louisville Project will continue to offer a data-focused framework for examining our community's progress for all of our citizens while looking for new ways to support actions that improve our community across our Deep Drivers.

Acknowledgements

Greater Louisville Project is hosted by The Community Foundation of Louisville and supported by a consortium of philanthropic foundations including The James Graham Brown Foundation, Brown-Forman, The C.E. & S. Foundation, Gheens Foundation, The Humana Foundation, The JP Morgan Chase Foundation, Jewish Heritage Fund for Excellence, Kosair Charities, Lift-A-Life Foundation, Brown Family Funds, and the Stephen Reily and Emily Bingham Fund.

The report was prepared by The Greater Louisville Project team: Ben Reno-Weber, Kelsie Smithson, Nate Kratzer, and Harrison Kirby with special assistance provided by Monica Unseld, Trisha Finnegan, Megan Webb, and Aly Goldberg.

15 YEARS *Beyond* MERGER 2018 COMPETITIVE CITY REPORT



Greater Louisville Project
ADVANCING A COMPETITIVE CITY

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Data provided by the U.S. Census Bureau, IPUMS-USA, Centers for Disease Control and Prevention, Robert Wood Johnson Foundation County Health Rankings, MIT Living Wage Calculator, USALEEP, IRS, JCPS, Archdiocese of Louisville, National Student Clearinghouse, and Council on Postsecondary Education. To view a detailed list of citations, visit greaterlouisvilleproject.org.



Greater Louisville Project
ADVANCING A COMPETITIVE CITY

15 YEARS OF CATALYZING CIVIC ACTION

In our 15th year, we examine the progress Louisville has made toward improving the Deep Driver metrics since Merger. By using key community metrics to compare Louisville to peer cities, we measure the return on investment for our collective efforts to create a more vibrant city.

KEY FINDINGS

“Over the last 15 years, Louisville has realized neither its worst fears nor its highest aspirations.”

ACROSS THE FOUR DEEP DRIVERS OF

EDUCATION, JOBS, HEALTH, and QUALITY OF PLACE,

LOUISVILLE GENERALLY PERSISTS IN THE MIDDLE OF OUR PEER CITIES, WITH GROWTH LARGELY REFLECTING NATIONAL TRENDS.

EDUCATION

Louisville has yet to meet its goal of 40% of adults holding a bachelor's degree or higher. However, we made more progress than two thirds of our peer cities. Despite these overall gains, educational gaps between Black and White residents not only persist, but are widening.

21st CENTURY JOBS

Current median income levels are recovering from the Great Recession and we rank toward the top of our peers. However, Louisville lags behind its peer cities in terms of the number of jobs in high wage occupations, and significant disparities persist in wages across race, sex, and geography.

HEALTH

Louisville ranks first among its peer cities for health insurance coverage, seeing a 10 percentage point gain from 2011 to 2016. Despite this, the city ranks 16th on the Health Outcomes Index, near the bottom of our peer group, and geographic disparities for life expectancy persist.

QUALITY OF PLACE

The population of residents living within the core county has remained consistent since Merger, and fears of the urban core hollowing out have not materialized. Most Louisvillians experience short commutes, and the city remains a relatively affordable place to buy or rent a home. Disparities exist across homeownership and affordability metrics, reflecting a history of redlining and segregation.

DEEP DRIVER PEER CITY RANKINGS OVER TIME

2005	2017
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	11
12	12
13	13
14	14
15	15
16	16
17	17

THE NEXT 15 YEARS:

A FOCUS ON EQUITY

Although we have made progress in line with our peers, large racial and geographic differences persist across virtually all community success measures. West End residents have lower life expectancies and worse educational outcomes than the rest of the city. Their homes do not appreciate in value as quickly, and they have longer commutes to work—among many other disparities. Black and Hispanic households remain more financially burdened than White households, and the bachelor's degree gap between Black and White residents has widened over the last 15 years. To help highlight and catalyze activity to address these inequities, GLP is committing to analyze and highlight racial, geographic, and gender gaps everywhere possible alongside measures of overall community progress.

ORIGINS OF GLP

At the time of merger, the Brookings Institution published the report Beyond Merger: A Competitive Vision for the Regional City of Louisville. This report and the GLP research that immediately followed it chronicled Louisville's strengths and potential challenges. Current GLP data highlight where we excel and where we need to accelerate our pace.

THE GLP MODEL: METHODOLOGIES AND DEFINITIONS

The Greater Louisville Project tracks Louisville's progress on the four Deep Drivers of competitiveness: Education, 21st Century Jobs, Health, and Quality of Place. By benchmarking progress relative to our peer cities, GLP assists the community in identifying which changes are a result of intentional efforts and which simply reflect national trends.

PEER CITIES

Peer cities are communities like Louisville. Every ten years, researchers at the University of Louisville perform an analysis of cities across the country using 70+ economic indicators. Through a variety of statistical techniques, they cluster the results to come up with a list of cities most similar to Louisville.

TRENDLINES

We use trendlines to demonstrate how Louisville compares to our peer group over time. One-fourth of peer cities fall below the 25th percentile, and three-fourths fall below the 75th percentile.

RANKING GRAPHS

Ranking data are divided into groups using a natural breaks algorithm. Those clusters are color-coded into green, yellow, and red.

DATA LIMITATIONS

GLP strives to use inclusive language and analyze data for traditionally underrepresented groups whenever possible. However, current data has its limitations. Data are often scarce for Hispanic and Latinx populations, as well for the LGBTQ+ population. National data we collect—for measures such as overdoses and certificates—are often unavailable at the zip code or neighborhood levels. While we strive to use language that is as inclusive as possible, the terminology we use to describe race, sex, gender, and other identities mirrors the data source it was retrieved from.

GLP is committed to presenting data as transparently as possible. Ranking graphs in the report show the most recent year of data available, and trendlines reflect all years of data available between 2000 and publication.

EDUCATION

DEGREE AND CERTIFICATE GROWTH

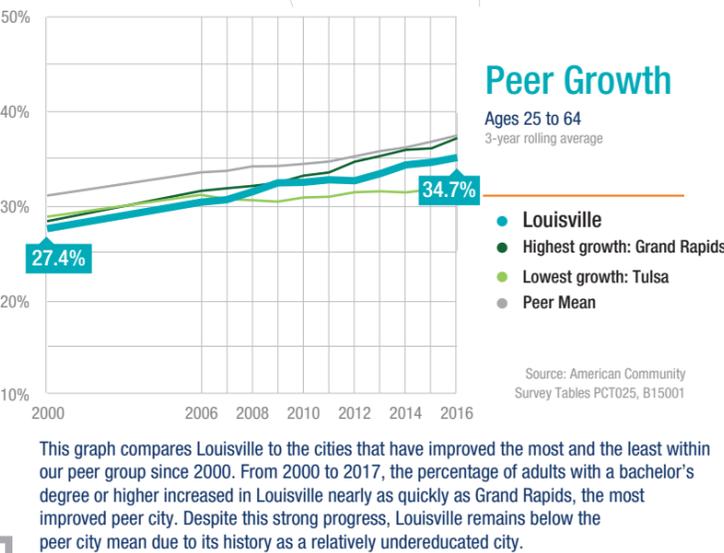
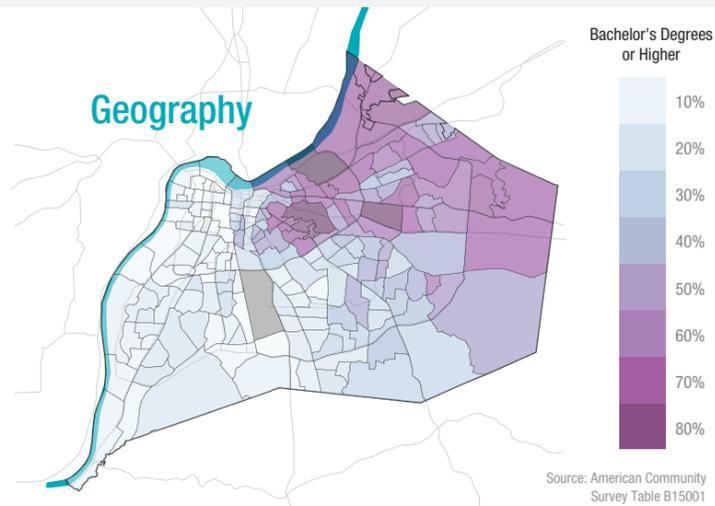
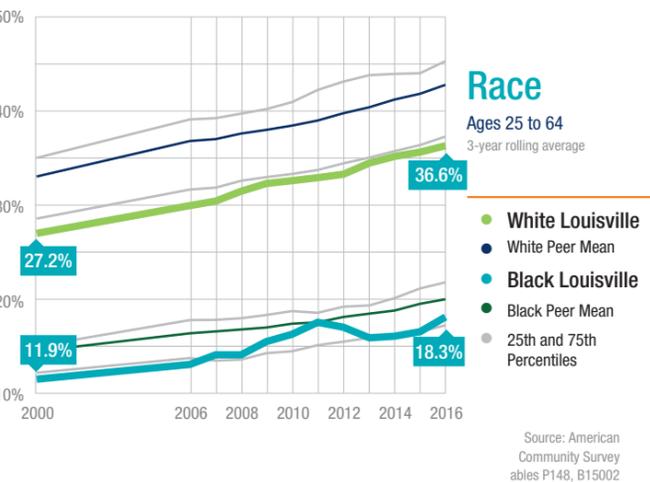
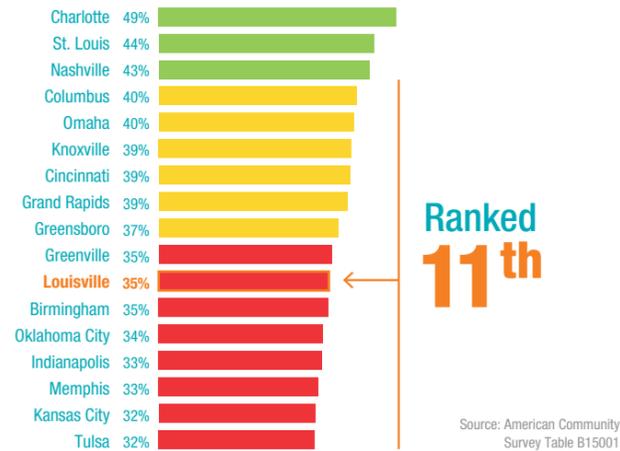
A skilled and educated populace is the foundation of any thriving city. Educated cities not only attract more 21st-century jobs that alleviate poverty and boost prosperity but are also able to reinvent themselves even after negative events, such as an economic downturn. Providing access to education is one of the the most promising ways we can build and sustain a greater Louisville.

Since 2010, Louisville's goal has been for 40% of working adults to hold bachelor's degrees. Data show that that goal has not been reached and significant gaps exist both between White and Black residents and across geographies, but the percentage of Louisvillians with degrees is growing at a faster pace than most of our peers. Since 2000, Louisville's ranking in working adult bachelor's degree attainment has increased from 14th to 11th among 17 peer cities.

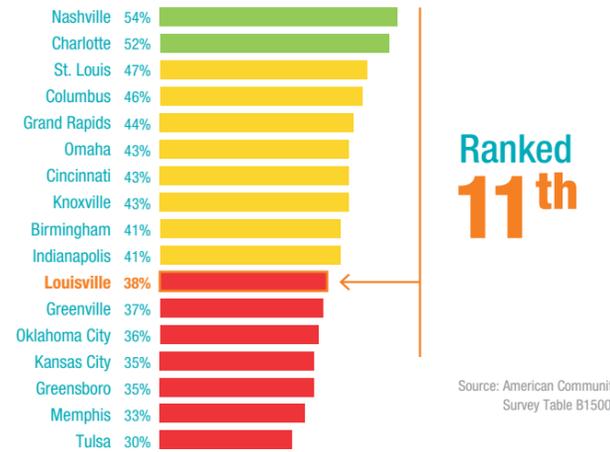


MAIN METRIC:

Bachelor's Degrees or Higher

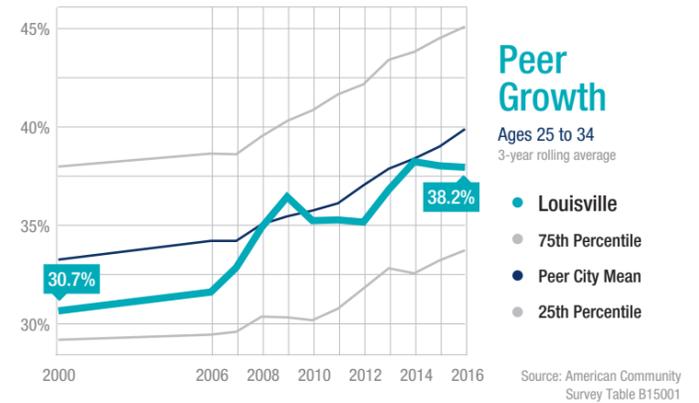


Young Adult Bachelor's Degrees or Higher



Louisville ranks 11th among its peer cities for the number young adults (ages 25-34) with a bachelor's degree or higher. This places the city below the peer city mean and in the bottom cluster of our peer group, with only 38.1% of young adult residents holding a bachelor's degree or higher.

Over the past 15 years, the number of young adults with bachelor's degrees in Louisville has increased. However, the city is still below the peer mean, and the growth in the percentage of young adults with bachelor's degrees has stagnated in recent years.



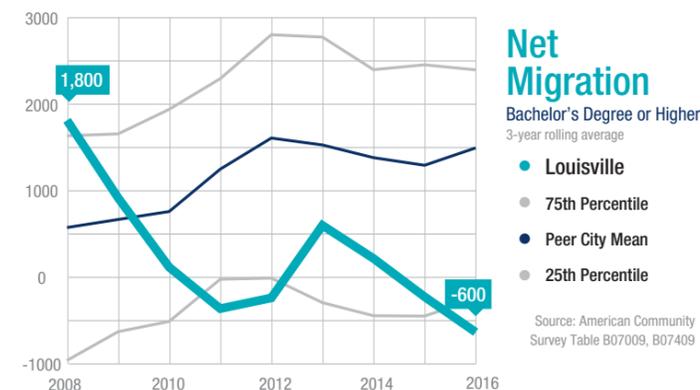
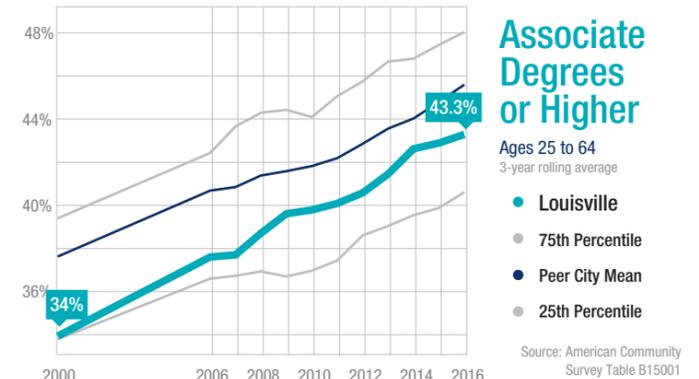
Lifelong Learning and Talent Attraction

Certificates have increasingly become a means of accessing higher-wage jobs.

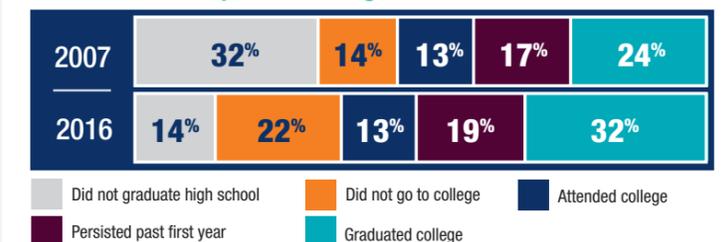
Louisville currently ranks among the top of its peer cities in measures of certificate holders. 2017 data reveal that 23% of Louisville residents held a certificate, 50% held a certificate or a higher degree, and 4% held only a certificate. Additionally, we rank 4th among our peers for associate degree attainment for young adults.

Source: GLP analysis of Current Population Survey Microdata

While Louisville is advancing from the 25th percentile to the peer city mean, it continues to fall below the peer mean for the percentage of adults with an associate degree.



Education Pipeline changes 2007 to 2016



JOBS

EARNINGS AND WAGES

Jobs provide a city with a wide range of economic and social benefits. More jobs create a larger tax base through which cities can provide services, while jobs that pay a living wage decrease demands for welfare benefit services. Greater employment increases neighborhood stability, neighborhood safety, future prospects for children, and individual health and wellbeing.

Louisville's median earnings are recovering from the Great Recession and are currently slightly above the peer city mean. As of 2017, Louisville ranks 6th among peer cities with median earnings of \$33,300.

Living Wage

Based on the MIT Living Wage Calculator, two thirds of working households in Louisville earned a living wage in 2016 that was enough to cover a basic level of living expenses such as food, childcare, healthcare, transportation, and taxes. The remaining third of households relied on government assistance; aid from nonprofits, friends, or family; or did not comfortably meet their basic needs. In a two-parent, two-child household, each parent would need to earn \$15.50 an hour working full-time to comfortably meet their basic needs.

Source: GLP analysis of American Community Survey Microdata and MIT Living Wage Calculator data.

Household Type	Living Wage	% Earning a Living Wage
1 Adult	\$22.9k	72.4%
1 Child	\$48.9k	25.9%
2 Adults	\$59.3k	13.7%
2 Adults, 1 Child	\$77.1k	11.5%
2 Adults, 2 Children	\$37.8k	75.8%
2 Adults, 3 Children	\$52.6k	71.4%
2 Adults, 4 Children	\$65.9k	69.8%
2 Adults, 5 Children	\$78.5k	59.7%

Current: 6th

Goal: 8th or higher

MAIN METRIC:

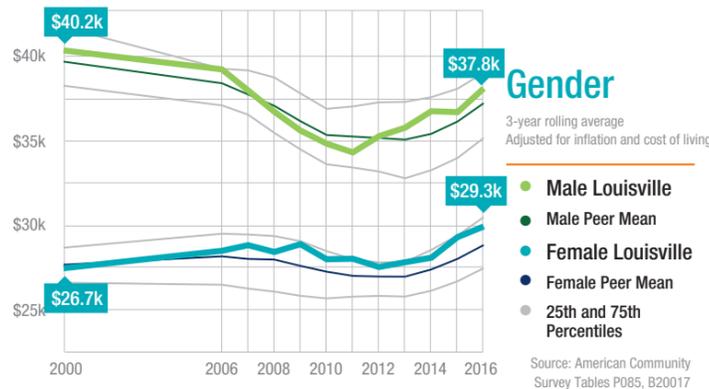
Median Earnings



Ranked 6th

Adjusted for inflation and cost of living

Source: American Community Survey Table B20017

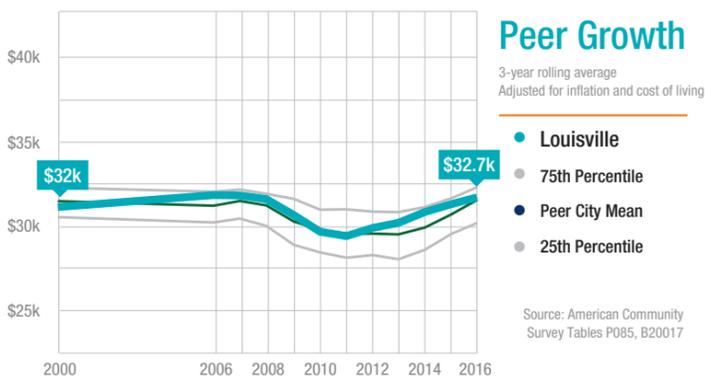


Gender

3-year rolling average Adjusted for inflation and cost of living

- Male Louisville
- Male Peer Mean
- Female Louisville
- Female Peer Mean
- 25th and 75th Percentiles

Source: American Community Survey Tables P085, B20017

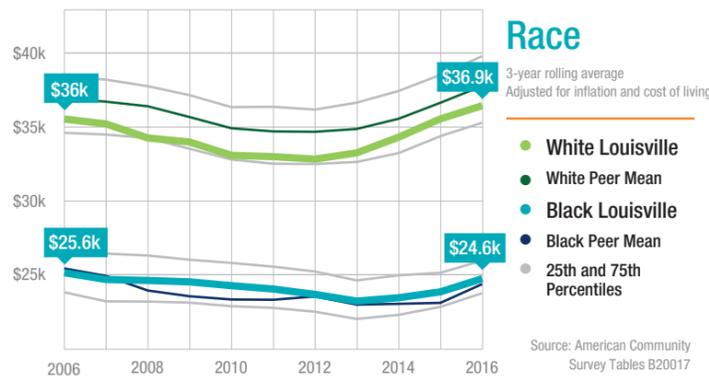


Peer Growth

3-year rolling average Adjusted for inflation and cost of living

- Louisville
- 75th Percentile
- Peer City Mean
- 25th Percentile

Source: American Community Survey Tables P085, B20017

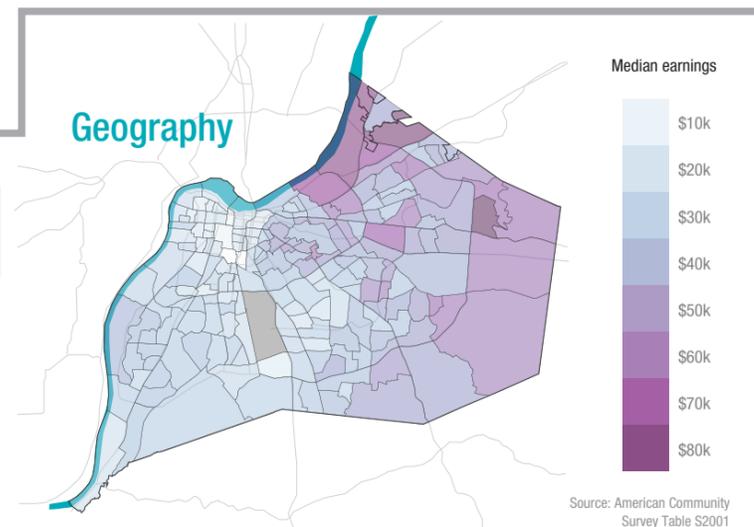


Race

3-year rolling average Adjusted for inflation and cost of living

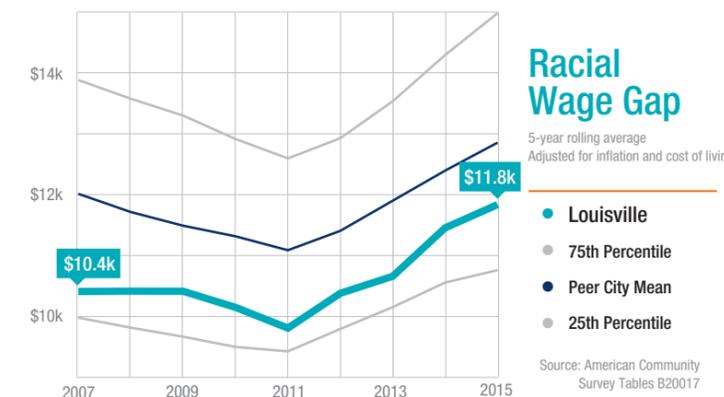
- White Louisville
- White Peer Mean
- Black Louisville
- Black Peer Mean
- 25th and 75th Percentiles

Source: American Community Survey Tables B20017



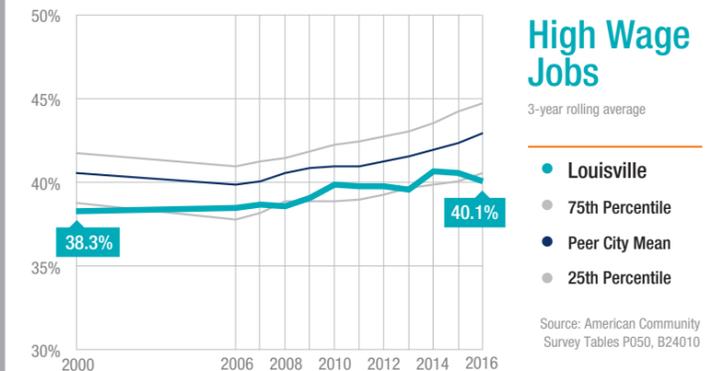
Residents in the eastern portions of the city—where some areas see median earnings of approximately \$70,000—have higher median earnings than residents in other areas of the city.

Racial Wage Gap

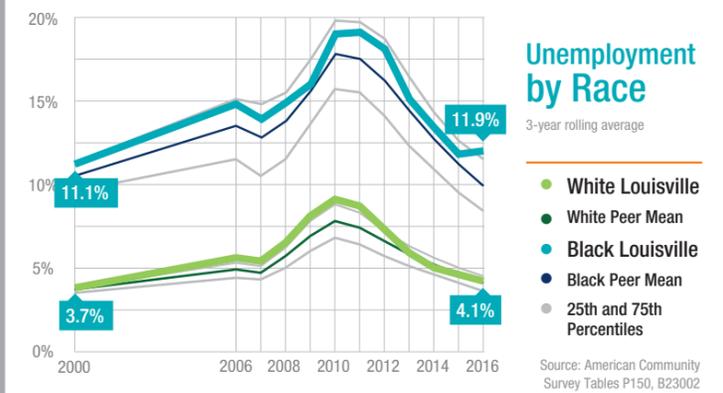


Although the wage gap between Black and White residents is lower than the peer average, this is mostly due to the relatively low wages of White Louisville residents and not due to high wages of Black residents. The wage gap has been increasing since 2011.

Employment and Occupations



Creating more high wage jobs would attract greater labor talent to Louisville, open new opportunities for existing residents, and improve collective health and quality of place across neighborhoods. High wage jobs also infuse the local economy with more money, which multiplies through other economic activity.



The unemployment rate for Black residents is several times larger than that of White residents. The 2017 unemployment rate was 3.6% for White residents and 13.5% for Black residents.

HEALTH

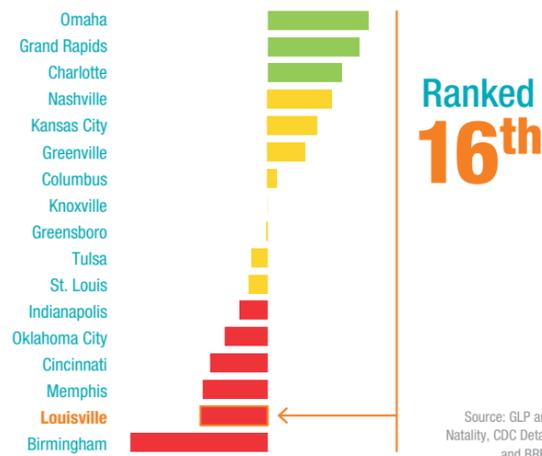
Health is deeply intertwined with every other success metric. Poor health outcomes inhibit educational, economic, and neighborhood success, while good health outcomes make other success more likely. Louisville's overall poor health outcomes represent a significant challenge to creating a thriving community, and the gaps in health equity make that challenge especially acute in certain neighborhoods.

WHAT IS THE HEALTH OUTCOMES INDEX?

The health outcomes index is a standard measure of Louisville's average performance across several measures of length and quality of life. The metrics included in the index are years of potential life lost, low birthweight, poor or fair health, poor mental health days, and poor physical health days. The factors are weighted and calculations performed as per the Robert Wood Johnson Foundation model.

MAIN METRIC:

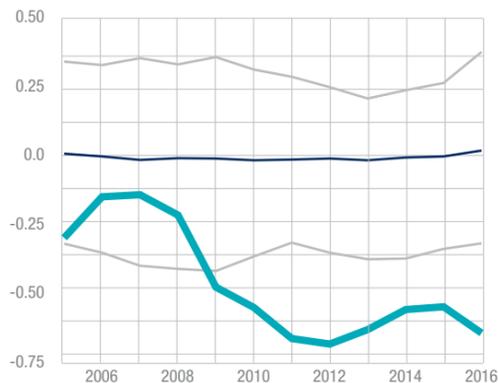
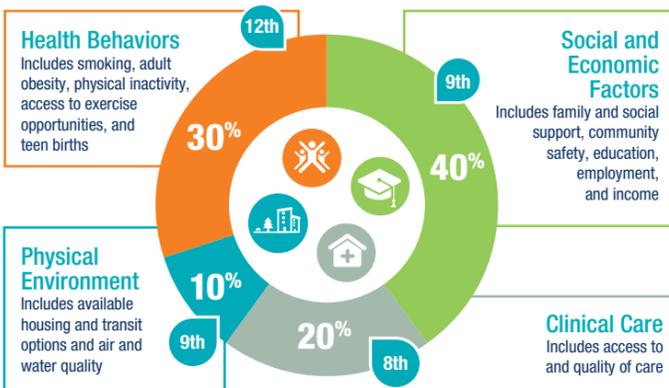
Health Index



Ranked **16th**

Source: GLP analysis of CDC Natality, CDC Detailed Mortality, and BRFSS Microdata

Health Factors



Peer Growth

3-year rolling average

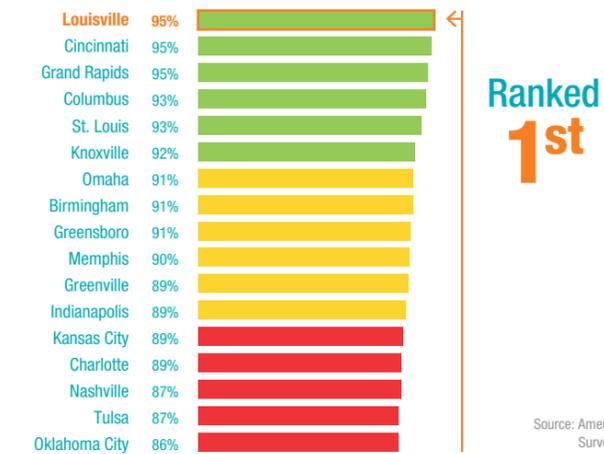
- Louisville
- 75th Percentile
- Peer City Mean
- 25th Percentile

Source: GLP analysis of CDC Natality, CDC Detailed Mortality, and BRFSS Microdata

Louisville has been experiencing a declining performance in measured health outcomes since 2008, falling below the 25th percentile in 2011 and remaining at the bottom since then.

Additional Health Factors

Health Insurance

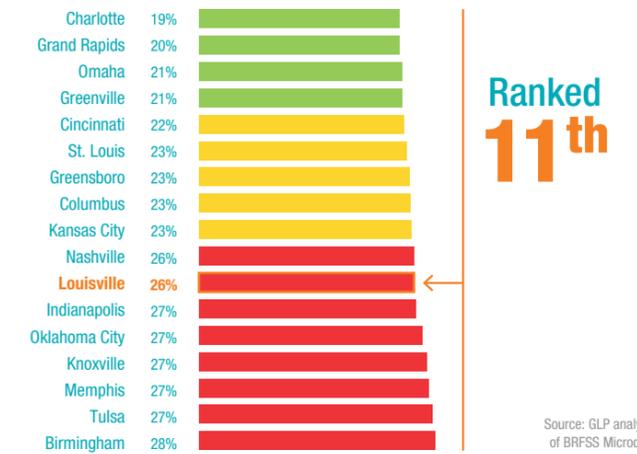


Ranked **1st**

Source: American Community Survey Table C27001

Among peer cities, Louisville has the highest rate of insured residents, with 94.8% of residents insured. This number began to increase in 2013 with the expansion of the Affordable Care Act.

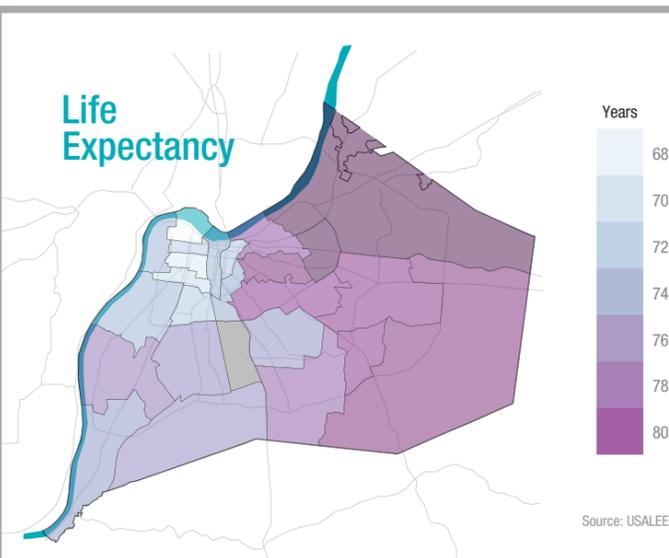
Physical Inactivity



Ranked **11th**

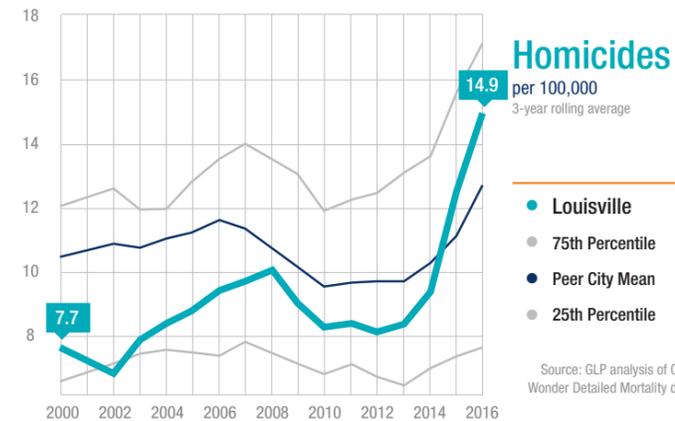
Source: GLP analysis of BRFSS Microdata

Physical inactivity refers to the percentage of adults age 20 and over reporting no leisure-time physical activity in the past year. Louisville is ranked 11th among peer cities, in the bottom cluster.



Life expectancy data varies greatly across Louisville with the highest values found in Northeastern Jefferson County.

Source: USALEEP



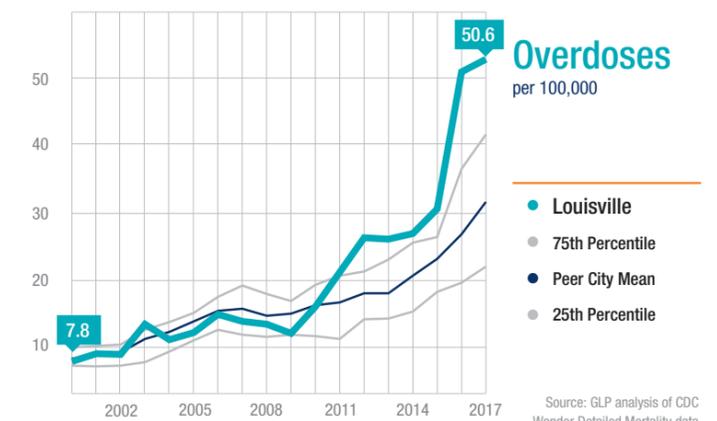
Homicides

per 100,000
3-year rolling average

- Louisville
- 75th Percentile
- Peer City Mean
- 25th Percentile

Source: GLP analysis of CDC Wonder Detailed Mortality data

Since 2014, Louisville's homicide rate has outpaced the peer city mean, with over 12 deaths per 100,000 residents.



Overdoses

per 100,000

- Louisville
- 75th Percentile
- Peer City Mean
- 25th Percentile

Source: GLP analysis of CDC Wonder Detailed Mortality data

Louisville sits at the bottom of the peer city ranking for the number of overdose deaths, with an age-adjusted rate of 51.8 deaths per 100,000 residents. In 2016, deaths from overdoses dramatically increased to the highest among our peers. Opioids are the largest contributor to overdose deaths in Louisville.

QUALITY OF PLACE

Since Merger, Louisville has not experienced population loss from the urban core inside the Watterson. However, some neighborhoods have shrunk while others have grown significantly. In general, neighborhoods toward the east of the city have seen the highest population growth. The Louisville population has grown steadily since 2000.

Approximately 60% of residents in the broader metropolitan area live in Jefferson County, and Louisville ranks 7th among peer cities in this measure of urban density. The percentage of residents living in the core county has remained largely unchanged since 2000.

MAIN METRIC:

Metropolitan Population in the Core County

Population Change:
2000 - 2017

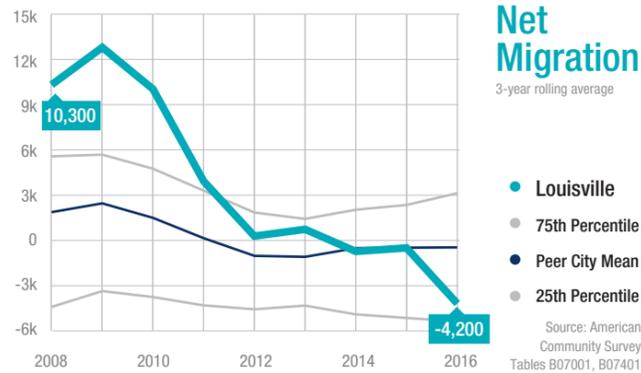


Source: GLP Analysis of American Community Survey Tables P001, B01003

Since 2000, the highest population growth in Louisville has been seen in the eastern part of the county. Most neighborhoods in the West End have seen very slight declines in population. The Portland and California-Parkland neighborhoods lost 17% and 16% of their residents, respectively.

Net Migration

Since 2008, the number of people moving out of Louisville has grown larger than the number of people moving into the city. This trend is more pronounced among young adults and residents with bachelor's or graduate degrees.

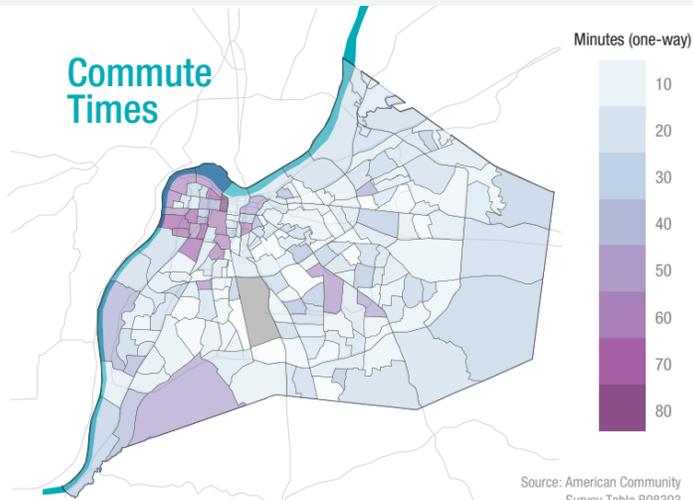


- Louisville
- 75th Percentile
- Peer City Mean
- 25th Percentile

Source: American Community Survey Tables B07001, B07401

Livability & Talent Attraction

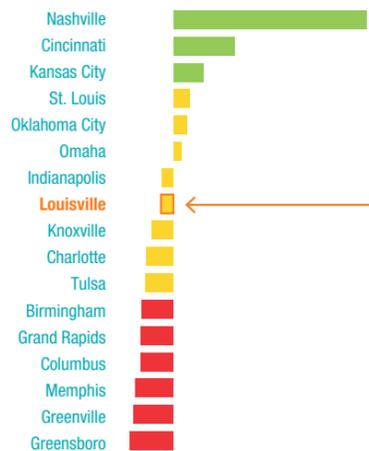
Commute Times



Source: American Community Survey Table B08303

West End residents are twice as likely as residents of the rest of the city to have a daily commute of over two hours.

Arts Vibrancy Index



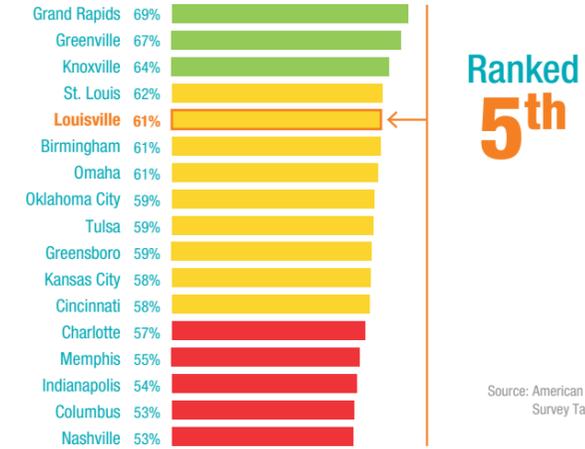
Source: GLP Analysis of US Census Bureau County Business Pattern and IRS Business Master File data

Ranked 8th

The Arts Vibrancy Index combines several indices of arts providers and arts dollars in a community. Louisville is near the peer mean on the Arts Vibrancy Index. The data is heavily skewed by Nashville's large music industry, and it should be noted that Louisville outperforms most peer cities. Louisville's biggest strength relative to its peers is its number of nonprofit arts and culture organizations, and its largest weakness is the total revenue generated by the arts sector. The Arts Vibrancy Index is adapted from SMU's DataArts program.

Housing

Homeownership

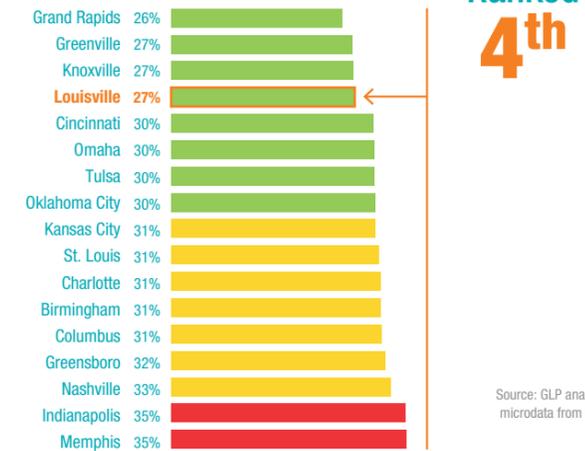


Ranked 5th

Source: American Community Survey Table B25003

Louisville ranks 5th in our peer group for homeownership. Around 61% of residents own their home. White residents are more likely than Black residents to own their homes. More Black residents than White residents are living in burdened homes, owned and rented.

Cost-Burdened Households

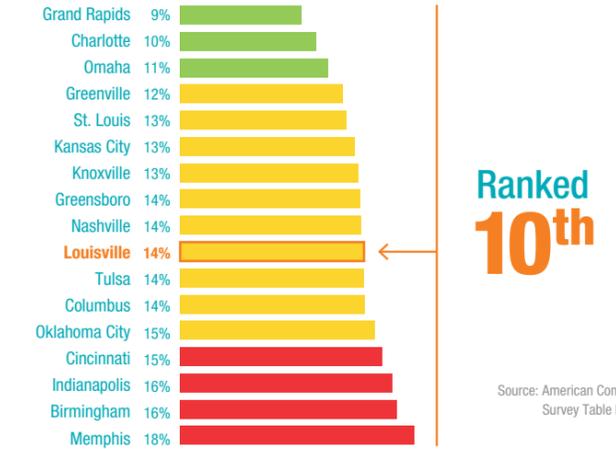


Ranked 4th

Source: GLP analysis of ACS microdata from IPUMS-USA

Cost-burdened households pay more than 30% of their income toward rent. Louisville has the fourth-lowest rate of burdened households among its peers thanks to a relatively low cost of living. However, West End residents are far more likely to live in burdened households than residents of other parts of the city.

Households in Poverty

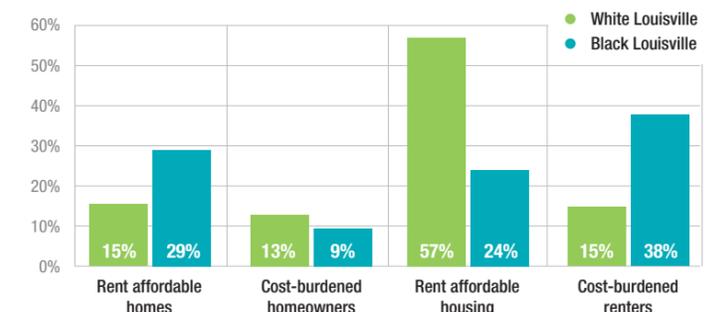


Ranked 10th

Source: American Community Survey Table B17017

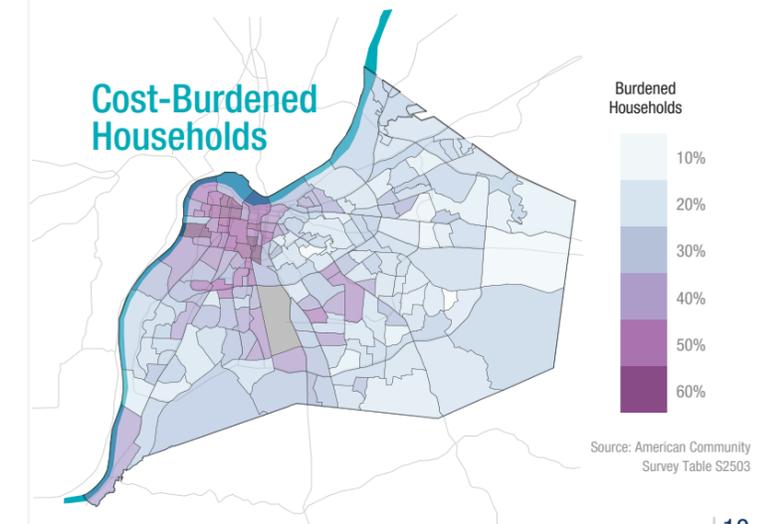
The percentage of households in poverty has decreased from a high of 17% following the Great Recession to 14% in 2017. Louisville's poverty rate is currently at the peer mean.

Homeownership, Affordability and Race



Source: GLP analysis of ACS microdata from IPUMS-USA

Cost-Burdened Households



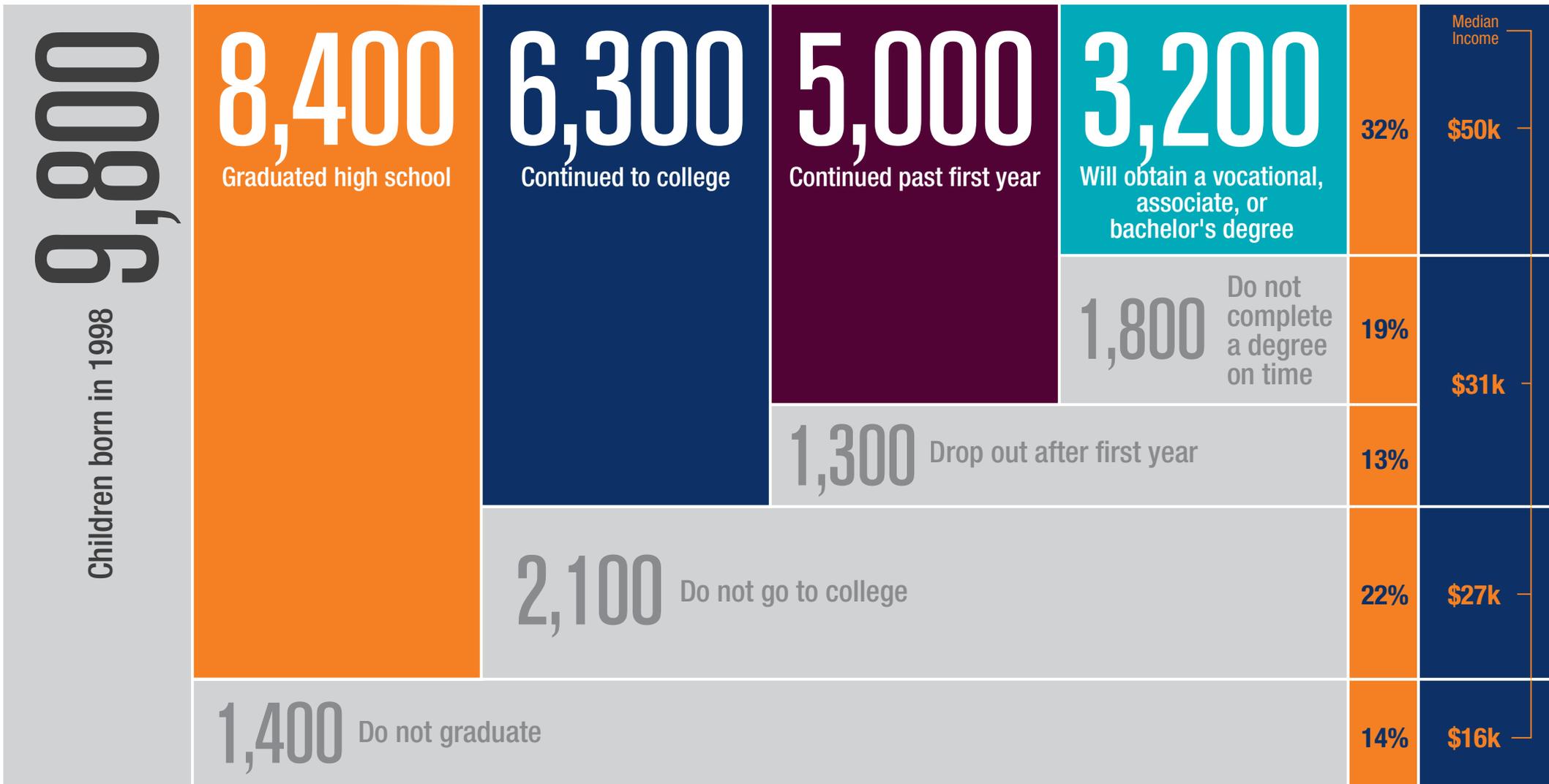
Source: American Community Survey Table S2503

EDUCATION PIPELINE



Greater Louisville Project
ADVANCING A COMPETITIVE CITY

This pipeline is a projection of the educational outcomes for the 9,800 Louisville children born in 1998.



Source: GLP analysis of data from the American Community Survey, JCPS, Archdiocese of Louisville, National Student Clearinghouse, and Council on Postsecondary Education.

This graphic describes students who graduate high school within four years, enroll in college immediately after, and earn bachelor's degrees within six years or vocational or associate degree within three years. Some students who leave the educational system will return later on to earn their GED, certificate, or degree.