



Enrichment
Services Program, Inc.
A Community Action Agency

Community Needs Assessment

Prepared for the Enrichment Services Program

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Carl Vinson
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Executive Summary

INTRODUCTION

The Enrichment Services Program (ESP) serves eleven counties across two states. Ten of the counties, Chattahoochee, Clay, Harris, Meriwether, Muscogee, Quitman, Randolph, Stewart, Talbot, and Troup, are in west central Georgia, and Russell County, Alabama, borders Muscogee and Chattahoochee counties. Every three years, ESP conducts a community needs assessment to evaluate current and emerging challenges within these counties. This



Community Needs Assessment includes a stakeholder survey and a review of the latest secondary demographic, socio-economic, and geographic data related to ESP's mission. ESP partnered with the J.W. Fanning Institute for Leadership Development and the Carl Vinson Institute of Government, two Public Service and Outreach units at the University of Georgia, to produce this Community Needs Assessment.

The Enrichment Service Program region encompasses the Columbus, GA-AL Metropolitan Statistical Area (MSA) and its surrounding counties. The service area is home to more than 420,000 people, approximately 360,000 in Georgia and 60,000 in Alabama. While there are consistent themes and shared experiences across the service area, the 11 counties have unique demographic and economic profiles that will be covered through this needs assessment. This Executive Summary distills these data into four themes identified in the secondary data analysis and supported by the Stakeholder Survey: Population Concentration and Regional Variation, Aging Population, Persistent Poverty, and Housing and Basic Needs Affordability.

A Secondary Data Analysis section and a Qualitative Analysis section follow this Executive Summary. The Secondary Data Analysis provides an overview of key metrics from publicly available data, and the Stakeholder Survey enriches the needs assessment by offering perspectives from employees, partners, and customers. Responses from the survey align with key issues identified from the secondary data analysis, including economic stability and basic needs.

Population Concentration and Regional Variability

The population within ESP’s service area is highly concentrated. The counties range in population from Muscogee County, home to more than 200,000 people and nearly half of the service area’s population, to six counties with fewer than 9,000 people. Five of these six counties are located to the south of Columbus-Muscogee County. Talbot County is the only county in the northern half of the service area with a population under 9,000. The other four counties, Meriwether, Harris, Russell (AL), and Troup, have populations ranging between 20,000 and 70,000. In short, about 50% of the population lives in Muscogee County, about 10% of the population lives in the six sparsely populated counties (mainly in the southern half of the service area), and about 40% of the population lives in the other four counties. Over the past decade, the four largest counties in the area, Muscogee, Troup, Russell (AL), and Harris have all exhibited population growth. The other counties in the region, which are smaller and rural, are experiencing population decline. Therefore, while the service area is growing, this is primarily due to population growth in a subset of counties. These regional differences between the northwestern part of the service area and the southern and eastern counties emerge in data points throughout the community needs assessment.

An Aging Population

The population in the ESP service area is aging, meaning that more people aged 65 and over live in the region, and they represent a larger share of the population than in previous decades. This trend holds for the state of Georgia and the US; however, the trend in the ESP service area is notable. In percentage terms, the aged 65 and over population increase in ESP counties is on pace with Georgia in the 2010s. Between 2010 and 2020 the region’s population aged 65 and older increased by 35.4%, while Georgia’s grew by 34.7%. However, what makes ESP unique is the extent to which its senior population accounts for the area’s total population growth in the last decade. The total population for the ESP service area increased by 21,435 individuals between the 2010 and 2020 decennial Censuses. Meanwhile, the aged 65 and over population increased by 18,093 residents, which means that the aged 65 and older population growth accounted for 84% of the service area’s population increase.

Interestingly, according to 2019–2023 American Community Survey (ACS) data, four of Georgia’s ten oldest counties (measured by the share of residents aged 65 and over) are located within ESP’s service area. However, these four counties — Quitman, Clay, Talbot, and Randolph — experienced a slower increase than the region as a whole in the aged 65 and over population.

The region's aging population is particularly notable for ESP and its programs because the area's senior poverty rate is high, suggesting that the population in need may be growing. The poverty rate of the population aged 65 and over in the counties where ESP serves is 21.8%, according to the 2019-2023 ACS.

Persistent Poverty Rates

The high poverty rate among seniors in the ESP service area extends across all age groups and spans most of the counties ESP serves. The poverty rate for all residents in ESP's 11-county service area is 18.5% in the 2019-23 ACS, which, although down about 1.5 percentage points from a decade earlier, remains over five percentage points higher than Georgia's poverty rate of 13%. Of particular note is the 28.1% poverty rate for the population under age six in ESP's service area. This is a minor decrease from about 31% in the 2014-18 ACS, but it marks nearly a decade of data showing that more than one in four children in the service area live in poverty. This data point signals the continued need for childhood programs for low-income children; a core part of ESP's mission aligned with community needs.

Housing and Basic Needs Affordability

More than 40% of households in the 11-county service area of ESP earn less than \$50,000 per year. In comparison, the median household income in Georgia is over \$70,000 per year. These modest incomes point to the challenges of affording basic services such as housing, food, and energy, a finding supported by both secondary data analysis and stakeholder surveys. In the survey, economic stability emerged as the dominant concern, with utility costs, housing affordability, and bill payment cited as the most urgent challenges. Secondary data availability on these topics varies, but by all available measures, the two sections of the analysis are in alignment. More than 29% of all households in the service area are cost-burdened, meaning they spend more than 30% of their income on housing costs. Meanwhile, 13.6% are severely cost-burdened, paying more than 50% of their income on housing costs. This problem is particularly acute for renters, 46% of whom are cost-burdened, and 22.7% of whom pay more than 50% of their income on rent. The share of homeowners who are cost-burdened is lower, at only 16.5%. However, in combination with the area's aging population and high senior poverty rates, it is also important to note the older aging housing stock—more than half of the service area's housing stock was constructed before 2000, and a significant share of older homes were built before 1970. Maintenance and repair costs for older housing stock among low-income seniors on fixed incomes may create financial hardship for a growing segment of residents in ESP's service area.

Secondary Data Analysis

Population Overview

A Stable Population in ESP's Service Area

Between the 2010 and 2020 Censuses, the total population of the Enrichment Services Program's (ESP) service area increased by 5.3%, or 21,435 people. While the population grew, it did so at only half the rate of the state's population, which grew by 10.6% between the Censuses. Notably, based on annual population numbers from the US Census Bureau's population estimates program, most of the service area's growth occurred between 2010 and 2013, with stagnation or a slight decline in total population numbers after 2013, as shown in Figure 2.

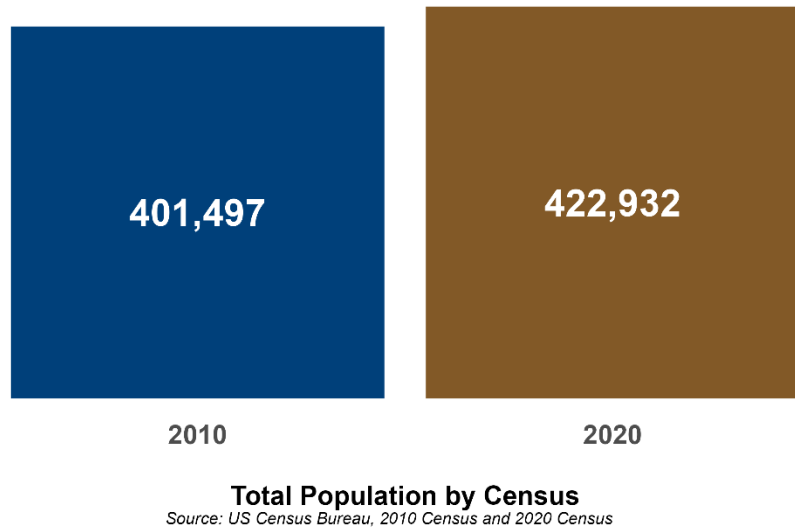


Figure 1. Total Population of ESP Service Area, 2010 & 2020

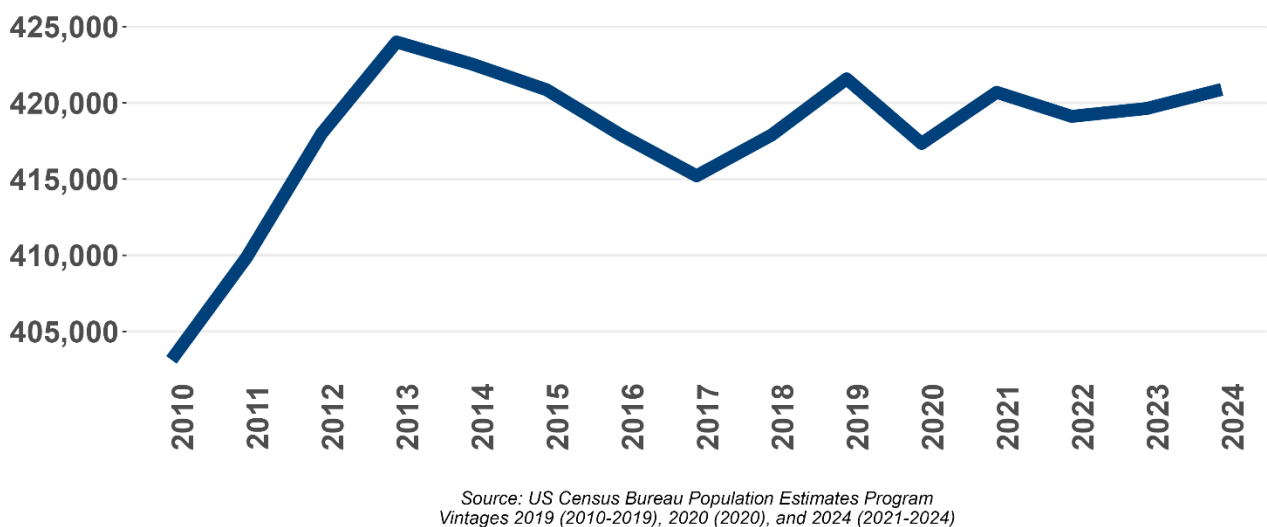
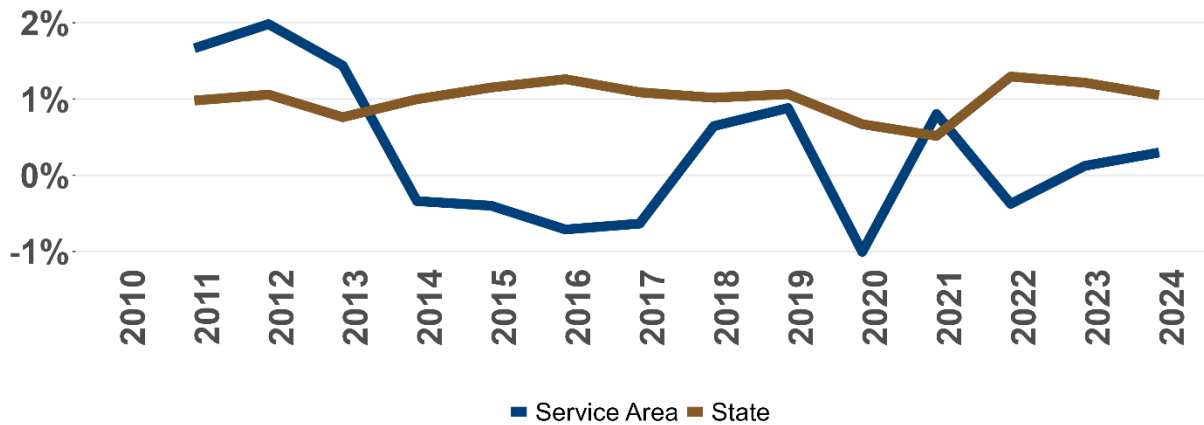


Figure 2. Service Area Population Over Time

Between 2010 and 2024, population growth in ESP’s service area lagged behind that of the state of Georgia. While Georgia’s population (blue line) increased at a relatively consistent annual rate of approximately 1%, Figure 3 shows that the service area (gray line) experienced population declines during 2014-2017, 2020, and 2022, ranging from approximately -0.5% to -1%. In only four years — 2011, 2012, 2013, and 2021 — the service area exceeded the statewide growth rate. Since 2013, the service area has alternated between modest population growth and decline, indicating overall population stability with year-to-year fluctuations. The underlying drivers of this trend are births, deaths, and migration.



Source: US Census Bureau Population Estimates Program Vintages 2019 (2010-2019), 2020 (2020), and 2024 (2021-2024)

Figure 3. Annual Percent Change in Population, ESP Service Area vs. State

Figure 4 illustrates that population growth in ESP’s service area has been minimal in recent years; specifically, the service area counties are projected to grow from 364,255 residents in 2025 to 380,128 by 2040, an increase of 3.4%. Although these projections suggest the service area is unlikely to experience significant population decline over the next 20 years,

growth is expected to remain well below that of Georgia, which is projected to increase its population by 13.2% over the same period.

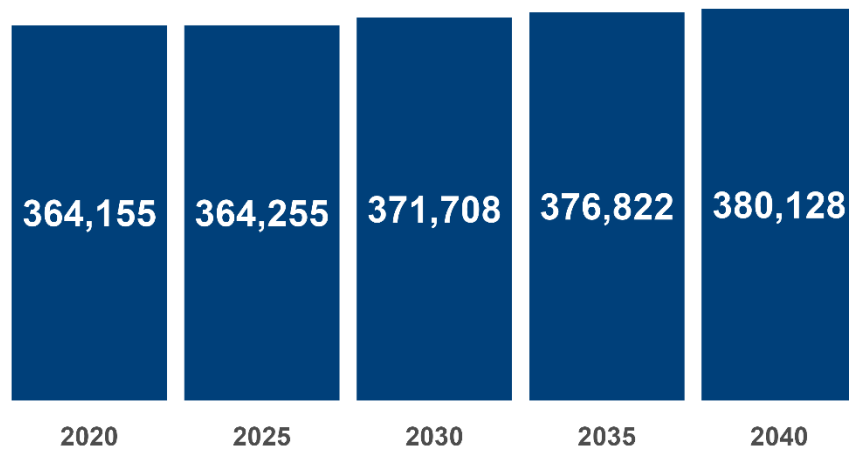
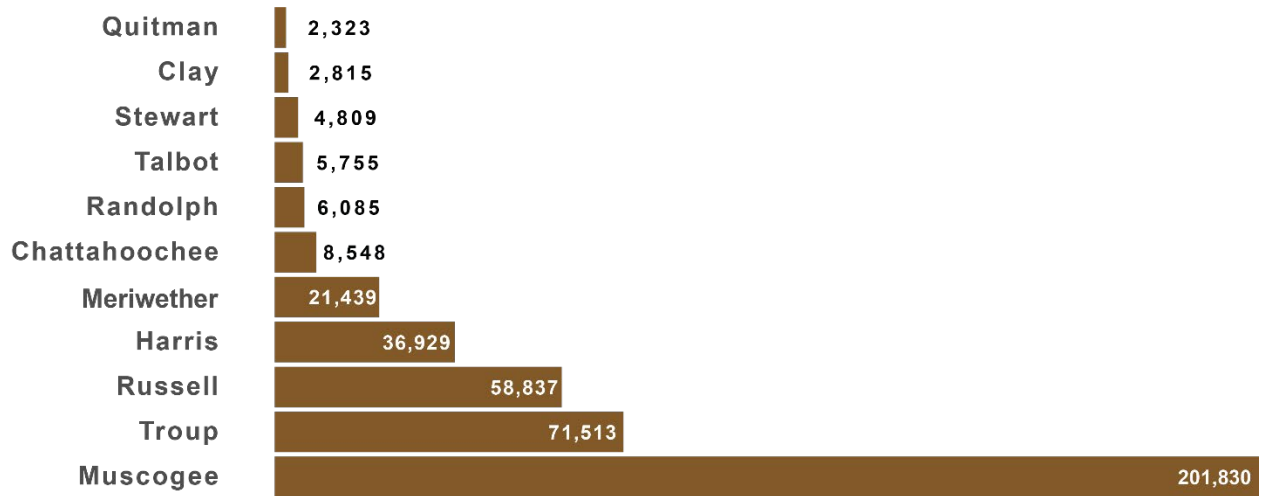


Figure 4. Projected Population of ESP Service Area (Georgia Counties Only)

Sources: US Census Bureau Population Estimates Program Vintage 2024 (Adjusted by CVIOG) and Georgia Governor’s Office of Planning and Budget Projections

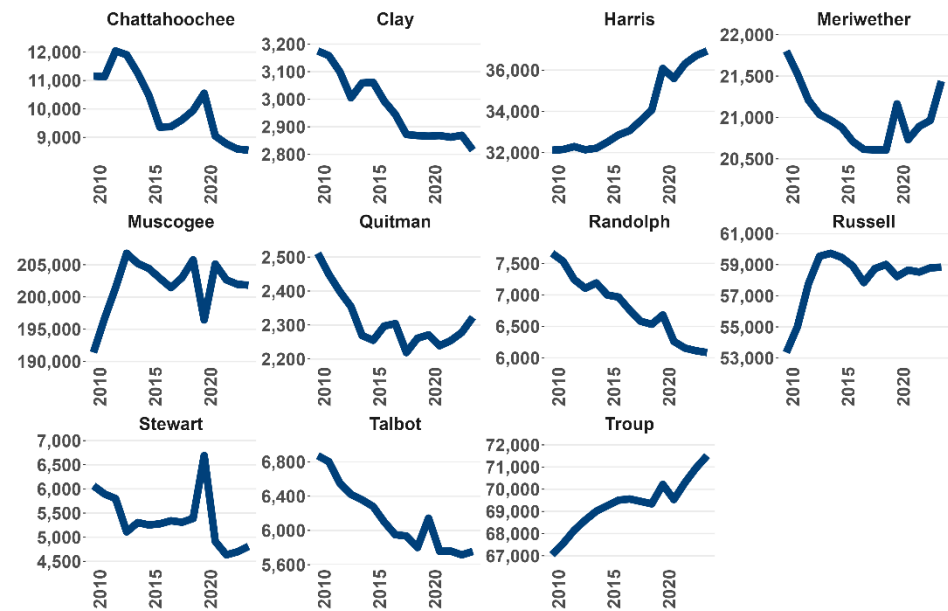
The population within ESP’s service area is highly concentrated in Muscogee County, which is home to approximately half of all residents (Figure 5). By comparison, six of the eleven counties have a population of less than 10,000 residents. The remaining four counties are mid-sized, with 2024 populations ranging from 20,000 to 70,000, namely Meriwether, Harris, Troup, and Russell (AL).



Source: US Census Bureau Population Estimates Program Vintages 2019 (2010-2019), 2020 (2020), and 2025 2021-2025

Figure 5. Population by County, 2024

Figure 6 presents county-level population trends from 2010 to 2024 and shows that, among the eleven counties in the service area, only the four most populous counties experienced net population growth over the period shown. Conversely, relatively less populated counties generally saw declines, while larger counties exhibited modest growth or relative stability. Overall, population change over this period has been uneven across the service area. This pattern suggests that recent population



Source: US Census Bureau Population Estimates Program Vintages 2019 (2010-2019), 2020 (2020), and 2025 2021-2025

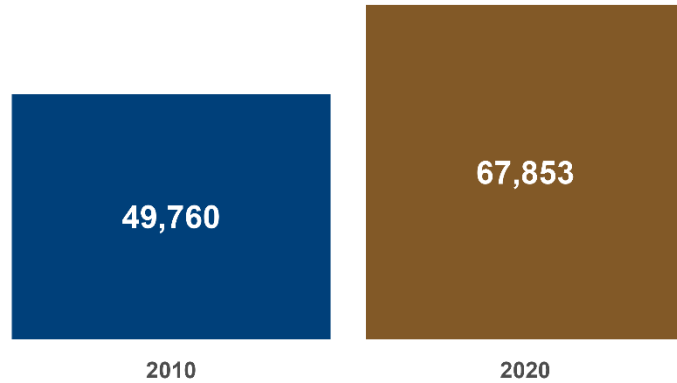
Figure 6. County Population Trends, 2010-2024

stability reflects growth in the northern counties, offset by losses in less populated areas. Looking ahead, projected population growth is expected to be concentrated in the mid-sized and more populous counties in the northern half of the region.

In summary, ESP's service area experienced slow population growth from 2010 to 2024, with most growth concentrated in the early years of the period. The population is projected to continue increasing over the next two decades, although at a rate well below that of the state of Georgia. Growth since 2010 has been uneven across the region, occurring primarily in larger and more populous counties, while smaller and more rural counties have experienced population decline. These trends highlight that both population growth and population decline present planning challenges, as growth can strain existing resources while population loss may contribute to economic decline and increased service needs.

An Aging Population

Consistent with national trends, the population within ESP’s service area has aged over the past decade and is expected to continue aging. Figure 7 shows that between the 2010 and 2020 Censuses, the population aged 65 and over within the service area increased by 18,093 individuals, or 35.4%, slightly outpacing the statewide growth rate of 34.7%. This increase in the population aged 65 and over accounted for approximately 84% of total population growth in the service area.



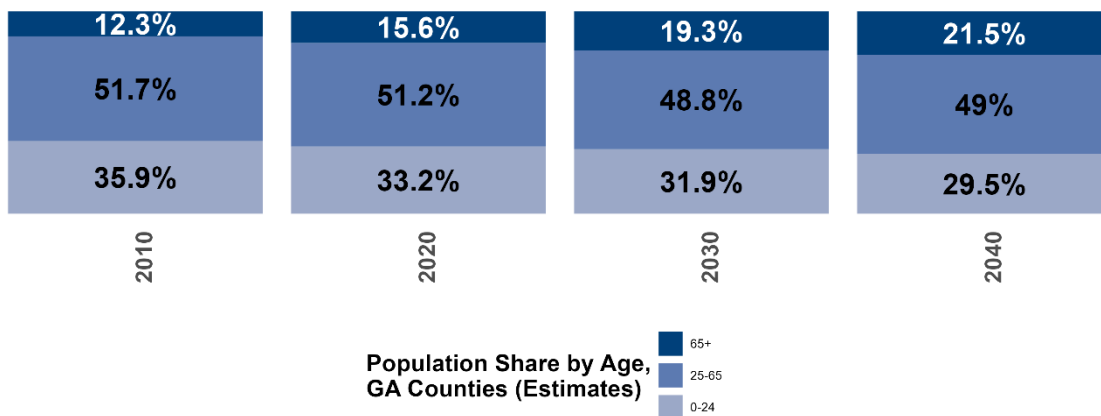
Population Aged 65 and Over by Census

Source: US Census Bureau, 2010 Census and 2020 Census

Figure 7. Population Aged Over 65 in ESP Service Area, 2010 vs. 2020

As shown in Figure 8, among the Georgia counties in ESP’s service area, the share of the population over age 65 increased by 3.3 percentage points from 2010 to 2020 and is projected to rise by an additional 5.9 percentage points by 2040. In contrast, the share of the population aged under 25 declined by 2.7 percentage points over the same period and is projected to decrease by a further 3.7 percentage points by 2040.

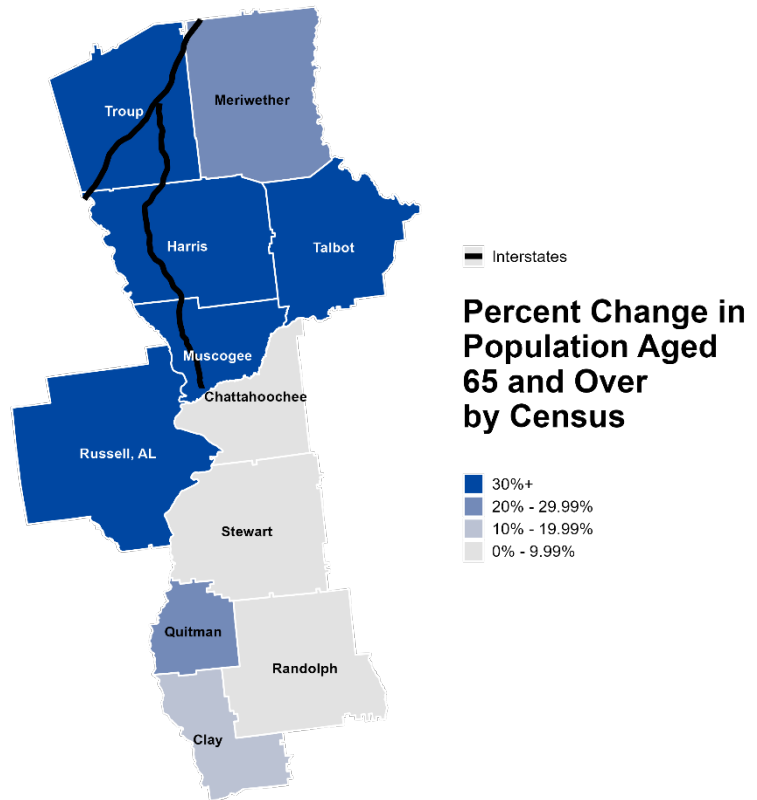
Together, these shifts indicate that the median age of the service area is expected to increase, with implications for demand for programs and services targeted to older adults. Even as the population ages, however, total population growth is projected to continue, meaning the number of residents under the age of 25 may still increase through 2040, albeit at a slower pace than growth among older age groups.



Sources: US Census Bureau Population Estimates Program Vintage 2024 (Adjusted by CVIOG) and Georgia Governor’s Office of Planning and Budget Projections

Figure 8. Population Share by Age in ESP Service Area, 2010-2040

As with overall population change in the service area, growth in the population among those aged 65 and over between the 2010 and 2020 Censuses was uneven across counties. Figure 9 shows that Troup, Harris, Talbot, Muscogee, and Russell (AL) counties each experienced increases of 30% or more in their populations aged 65 and over, while most other counties saw increases below 20%. Consistent with broader population trends, aging within ESP’s service area is being driven primarily by changes in the largest and most populous counties.



Source: US Census Bureau, 2010 Census and 2020 Census
 Figure 9. Percent Change in Population Aged Over 65 by County

Several counties in the service area, Muscogee, Harris, Talbot, Troup, and Russell (AL), experienced the largest percentage increases in the population aged 65 and over, in part because these counties began the period with relatively younger age profiles. By contrast, several other counties already had comparatively older populations. According to 2019-2023 ACS data, four of Georgia’s ten oldest counties (measured by the share of residents aged 65 and over) are located within ESP’s service area. As shown in Table 1 these counties — Quitman, Clay, Talbot, and Randolph — are shaded in light blue; of the four, all but Talbot experienced less than 30% growth in the senior population between the 2010 and 2020 Censuses.

Table 1. Georgia's Ten Oldest Counties

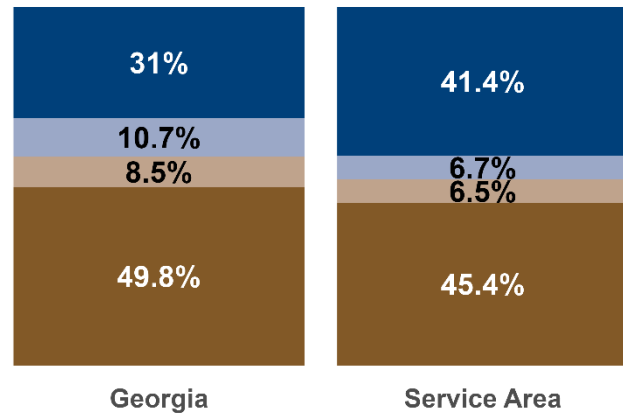
County Name	Population over Age 65	Total Population	Percent of Population over Age 65
Towns County	5,103	13,184	38.7
Union County	9,828	27,601	35.6
Quitman County	806	2,323	34.7
Greene County	6,880	21,091	32.6
Fannin County	8,409	25,854	32.5
Clay County	868	2,815	30.8
McIntosh County	3,590	11,800	30.4
Rabun County	5,365	17,711	30.3
Talbot County	1,657	5,755	28.8
Randolph County	1,735	6,085	28.5

Source: US Census Bureau, 2018-2023 American Community Survey.

In summary, the population in ESP’s service area is aging. From 2010 to 2020, service area counties experienced a 35.4% increase in the population aged 65 and over. The service area is projected to continue aging, with the share of residents aged 65 and over expected to increase by an additional 5.9 percentage points by 2040. These trends have implications for demand for support services targeted to older adults, particularly those with limited financial resources, and are especially relevant given the increases in elder poverty discussed later in the report.

Race and Ethnicity

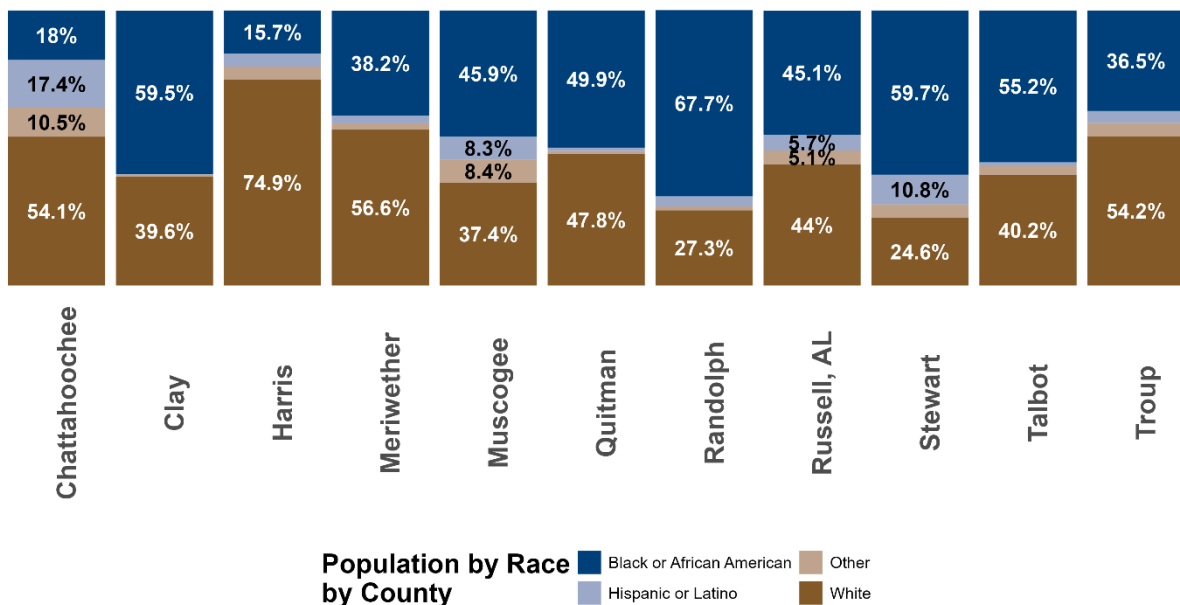
ESP’s service area is more racially and ethnically diverse than Georgia’s population. The service area is 45.4% White, 41.4% Black, 6.7% Hispanic, and 6.5% some other race (Figure 10). Notably, the service area has a significantly larger Black population than the state of Georgia, at 41.4% versus 31% for the state. The White, Hispanic, and other populations are all smaller than the state by around two to five percentage points.



Population by Race
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023
 Figure 11. Population by Race in ESP Service Area vs. State

Observing race on the county level reveals substantial variation.

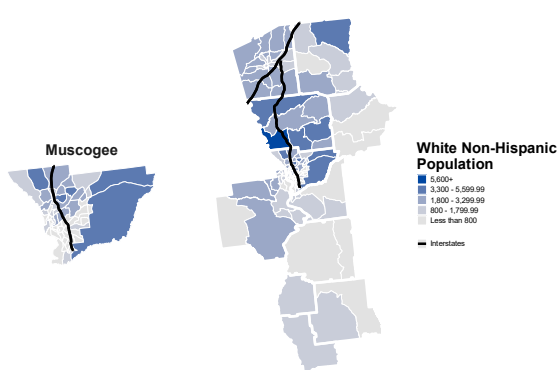
Harris county, for example, is 74.9% White, while Randolph county is 67.7% Black. Chattahoochee differs noticeably from other counties in the region in that each group accounts for at least 10% of the county’s population; the 17.4% Hispanic and 10.5% some other race, in particular, are substantially higher than both the ESP service area and the state of Georgia (Figure 11).



Population by Race by County
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023
 Figure 10. Racial Composition of Population by County

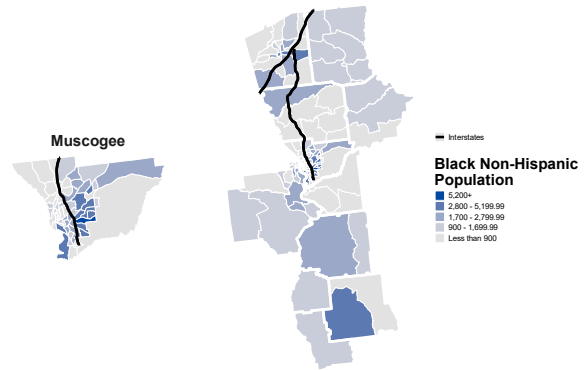
This difference likely reflects the presence of Fort Benning in the county, as military bases often have demographic compositions that differ from those of surrounding areas because their populations are transient and recruited from a national pool.

These racial and ethnic patterns unfold differently at smaller geographic scales. Figure 12 through Figure 15 show race and ethnicity by Census tracts - geographic boundaries that approximate the size of a neighborhood (about 3,000 – 5,000 people). The Census tract maps indicate that the service area’s White population is concentrated in the northern counties, specifically Harris and Troup, as well as the outer tracts of Muscogee county (Figure 12). In contrast, the Black population clusters in the southern tracts of Muscogee county and is distributed more evenly across the remaining tracts in the region (Figure 13). Hispanic and other race populations also cluster in the outer Muscogee tracts, but do not show the same concentration in other counties (Figure 14 and Figure 15).



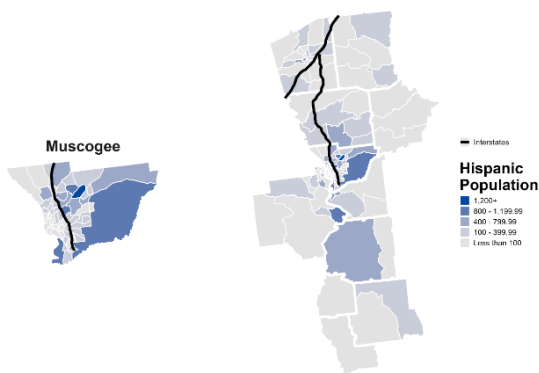
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Source: U.S. Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 12. White Non-Hispanic Population by Tract



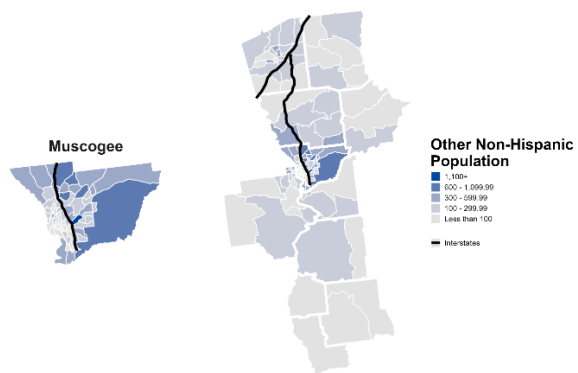
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Source: U.S. Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 13. Black Non-Hispanic Population by Tract



Missing Tracts Have No Data For This Variable
Source: U.S. Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 14. Hispanic Population by Tract



Missing Tracts Have No Data For This Variable
Source: U.S. Census Bureau, 5-Year American Community Survey, 2019-2023

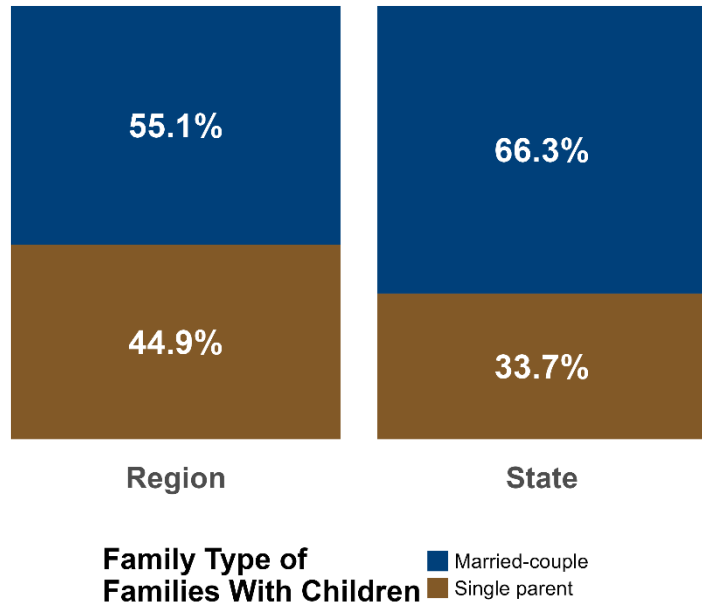
Figure 15. Other Non-Hispanic Population by Tract

The inner-south Muscogee tracts with higher concentrations of Black residents also exhibit higher poverty rates, lower median incomes, and higher proportions of renter - occupied housing relative to other tracts. These characteristics indicate elevated vulnerability and potential need for social support services.

Family Types

In the service area, 55.1% of families were married couples, while 44.9% were single-parent households (Figure 16). These shares contrast with statewide patterns, where 66.3% of families are married couples and 33.7% are single-parent households.

Figure 16: Family Types in ESP Service Area vs. State



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Disability

Within the ESP service area, 18% of the population had at least one disability (Figure 17), five percentage points higher than the statewide share of 13%. Additionally, 8.8% of the service area population had two or more disabilities, compared with 6% statewide. These figures indicate that the service area has a larger disabled population than the state overall, suggesting elevated demand for services targeted to individuals with disabilities.

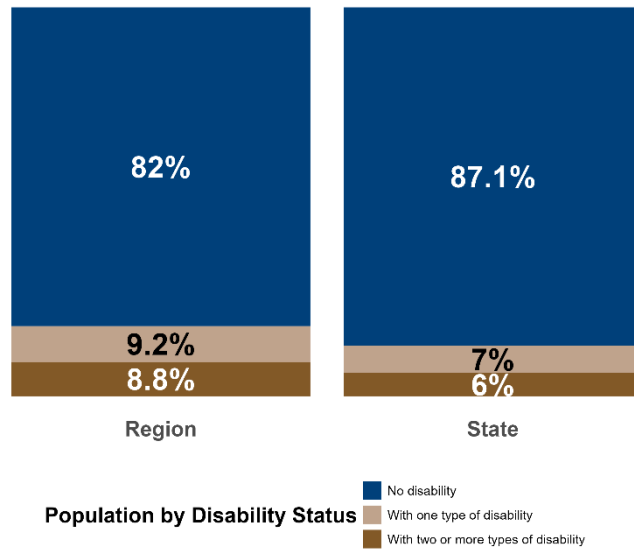


Figure 17. Population by Disability Status in ESP Service Area vs. State

Disability prevalence increases with age in both ESP's service area and the state (Figure 18). Among people under 18, 6% in the service area had a disability, comparable to the statewide share. For adults aged 18 to 64, 17% in the service area had a disability, six percentage points higher than the statewide rate of 11%. Among those aged 65 and over, 40.8% in the service area had a disability, 6.4 percentage points higher than the state rate of 34.4%. These gaps indicate that adults in ESP's service area face consistently higher rates of disability than adults statewide, highlighting a greater potential demand for age-specific support services.

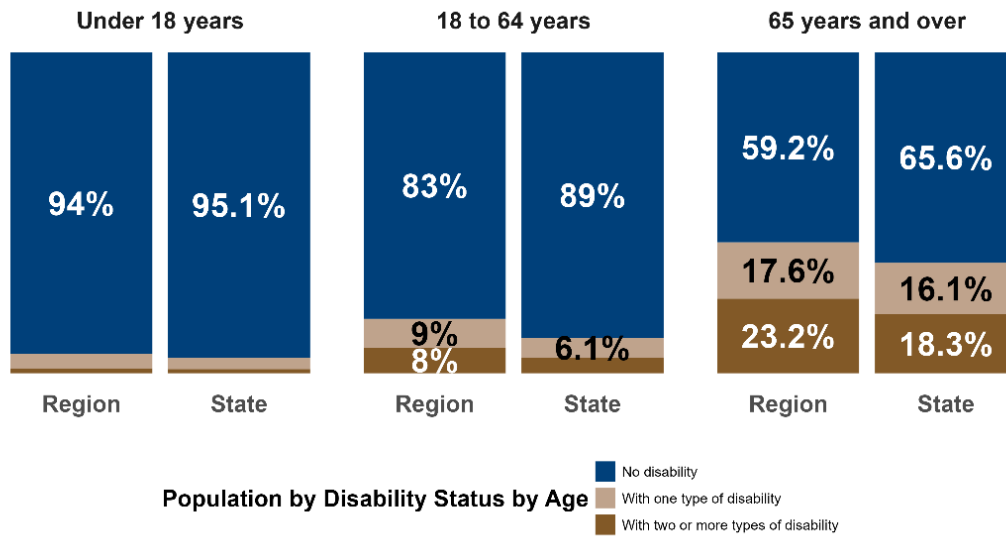


Figure 18. Disability Status by Age Group in ESP Service Area vs. State, 2019 - 2023

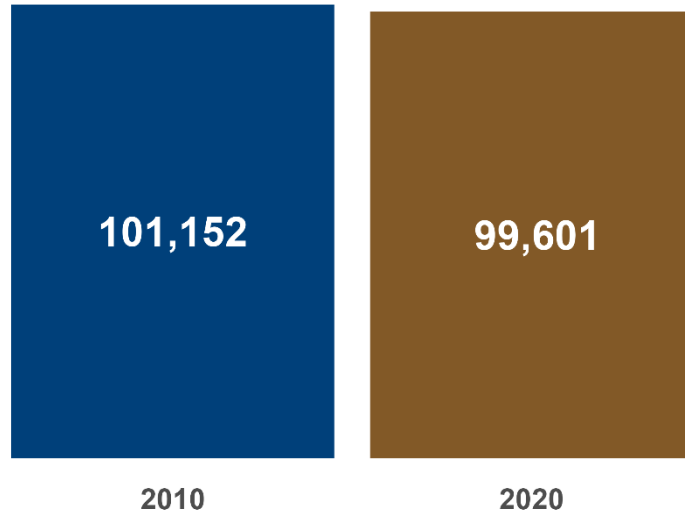
Youth and Childcare Needs

The Youth Population

The youth population (under 18 years) in ESP’s service area remained largely stable between the 2010 and 2020 Censuses, decreasing by 1,551 people, or roughly 1.7% (Figure 19).

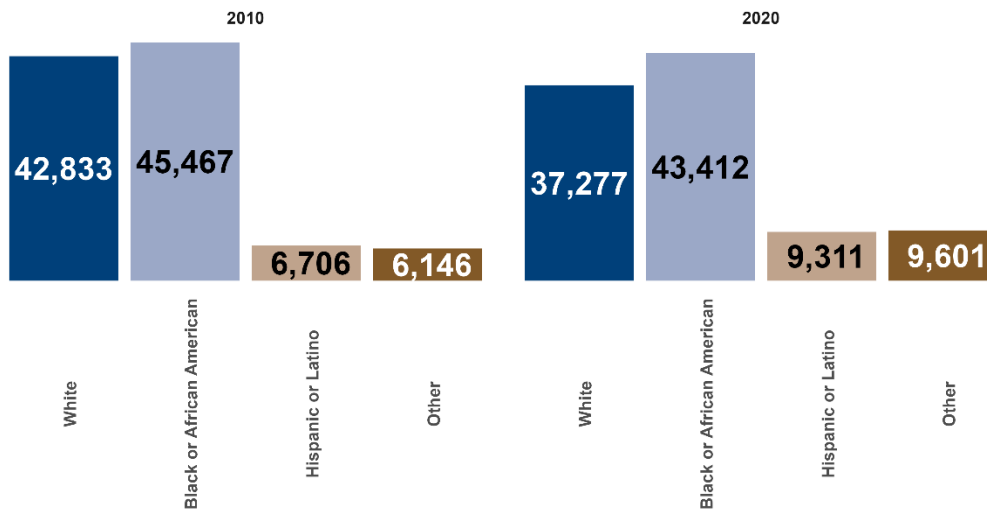
Over the same period, the racial and ethnic composition of youth became more diverse. The number of White youth declined by 5,556 people, a 13% decrease, while Black youth decreased by 2,055 people, a 4.5% decline.

Hispanic youth increased by 2,605 people, a 39% rise, and youth of other races (including Asian, Native American, Pacific Islander, and two or more races) grew by 3,455 people, a 56% increase (Figure 20). These changes indicate that, despite a relatively stable total youth population, the service area experienced substantial growth among Hispanic and other-race youth and modest declines among White and Black youth, contributing to a more diverse youth population.



Source: US Census Bureau, 2010 Census and 2020 Census

Figure 19. Population Aged Under 18 in ESP Service Area, 2010 & 2020



Source: US Census Bureau, 2010 Census and 2020 Census

Figure 20. Racial Composition of Population Aged Under 18, 2010 & 2020

Trends in the Population Aged Under Four Years

While the overall population under 18 remained stable, the population of children ages zero to four in ESP’s service area declined from 28,927 in 2010 to 26,021 in 2024, a 10% decrease (Figure 21). This decline is projected to continue, with the population of children ages zero to four expected to reach 20,371 by 2030, approximately one-third lower than in 2010 (Figure 22). These trends have implications for childcare and early education, as a shrinking population of young children may lead to reduced demand for child-related services.

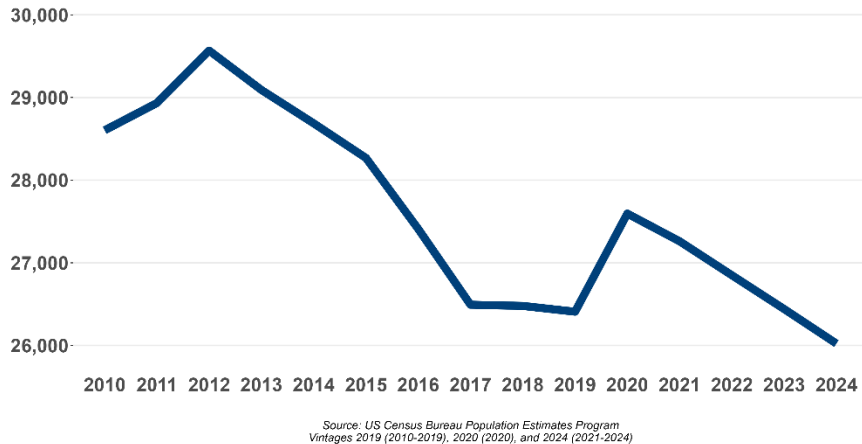


Figure 21. Population Aged Under 4

In summary, the population of children ages zero to four in ESP’s service area has declined since 2010 and is projected to continue declining through the 2020s. Between 2010 and 2020, declines occurred primarily among Black and White children, while the Hispanic and other-race populations in this age group increased slightly. This shift has implications for early childcare and education, as a smaller population of young children may reduce demand for services targeting families with children ages zero to four, including programs such as Head Start.

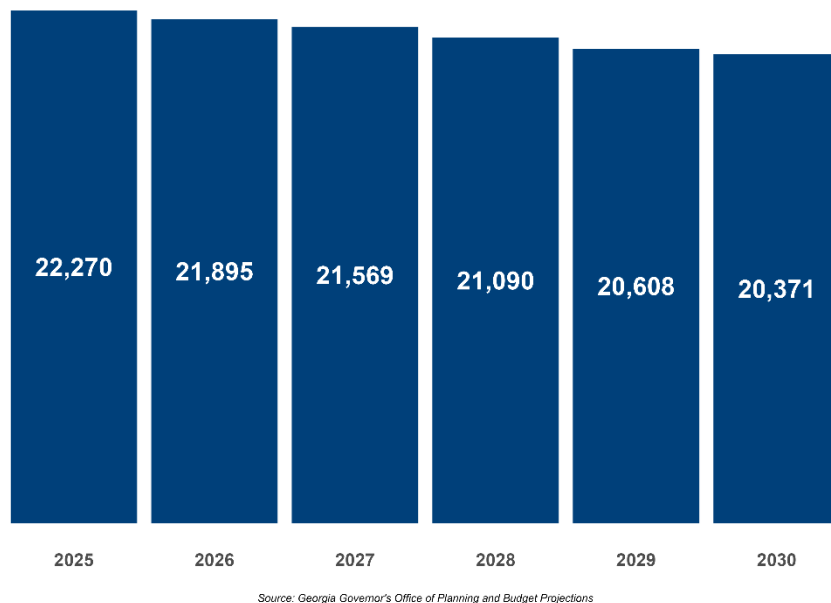


Figure 22. Projected Population Aged 0-4

Early Childcare and Education Enrollments

Declines in the population of children ages zero to four are associated with decreases in early elementary enrollments, as shown in Figure 23. Across the service area, annual kindergarten and first-grade enrollments fell by approximately 750–1,000 students between 2014 and 2023. In contrast, Pre-K enrollments remained stable or increased slightly over the same period, potentially reflecting higher participation rates among eligible children, since Pre-K is optional.

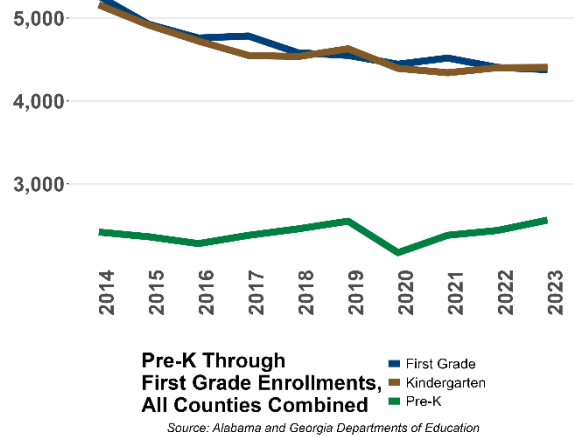


Figure 23. Early Education Enrollments in ESP Service Area

County-level data show differential enrollment trends across the service area (Figure 24). Stewart, Meriwether, and Clay counties experienced declines across all three grade levels, reflecting their smaller populations. In contrast, larger counties — Muscogee, Russell (AL), Troup, and Harris — exhibited relatively stable enrollments, with Harris County showing increases across all three grade levels and Russell (AL) remaining stable or slightly increasing.

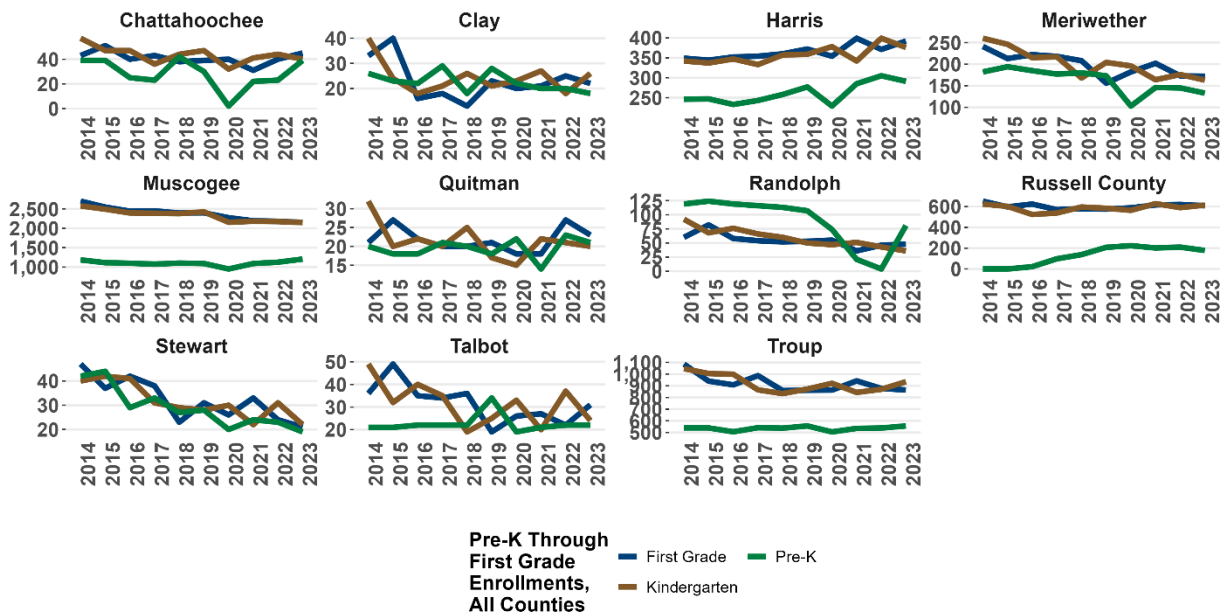


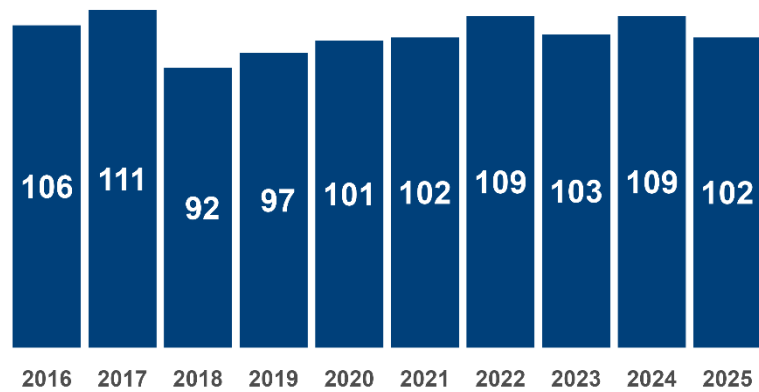
Figure 24. Early Education Enrollments by County

Childcare Workforce

The number of childcare establishments in the ESP service area remained largely stable over the past decade, averaging 90 –110 establishments annually (Figure 25). Establishments declined most sharply between 2017 and 2019, from 111 to 92, but increased to approximately 103 in the 2020s. County-level data (Figure 26)

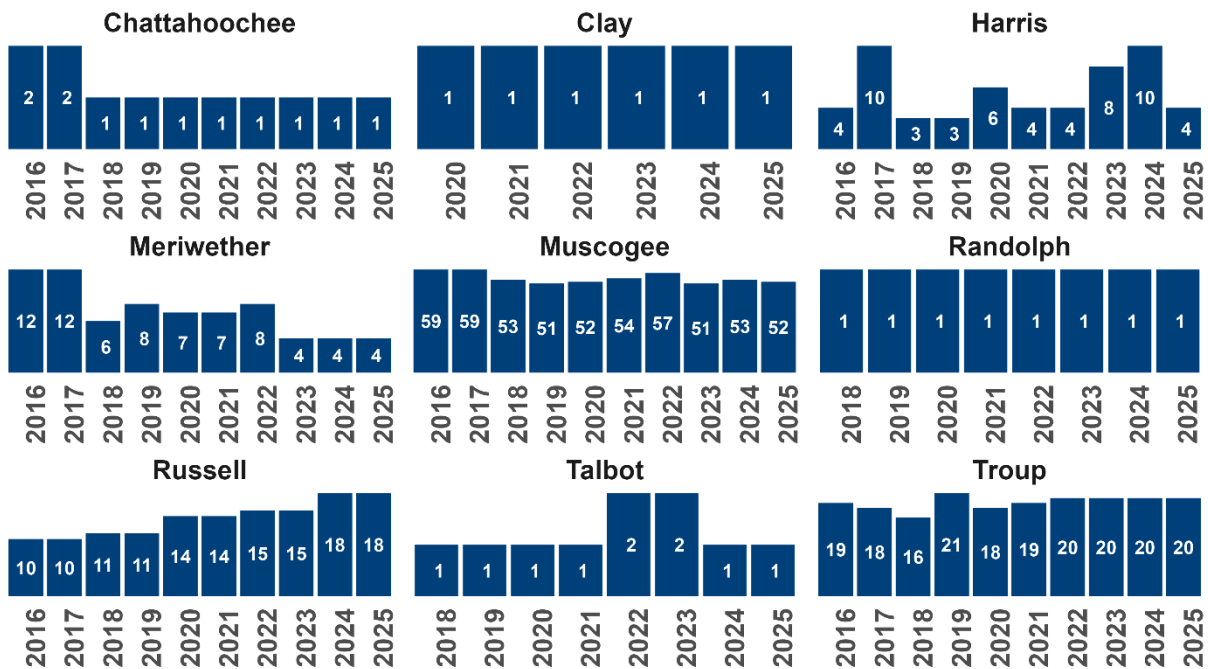
indicate that over half of all establishments are located in

Muscogee county, roughly one-fourth in Troup county, and the remainder are distributed among Harris, Meriwether, and Russell (AL) counties. The number of establishments in Russell (AL) has either increased or remained steady each year since 2016.



Source: Bureau for Labor Statistics
Quarterly Census of Employment and Wages

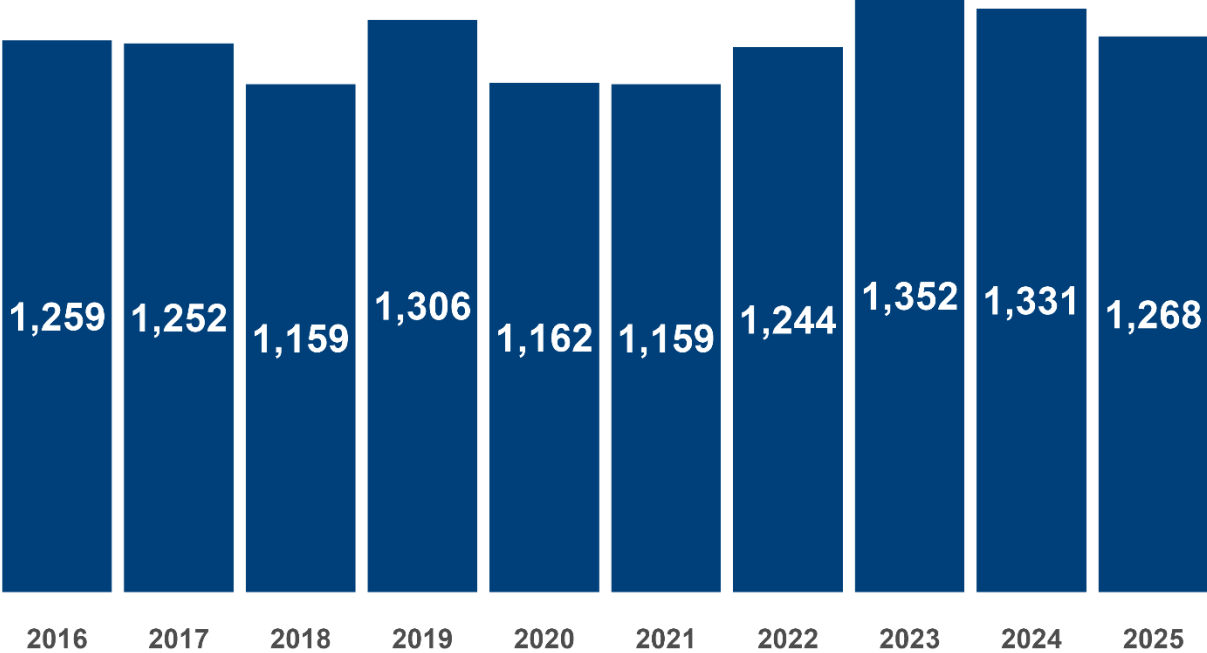
Figure 25. Number of Childcare Establishments



Source: Bureau for Labor Statistics
Quarterly Census of Employment and Wages

Figure 26. Number of Childcare Establishments by County

The number of childcare workers in the ESP service area remained between 1,100 and 1,300 from 2016 to 2022 and increased to 1,300 in the three most recent years (Figure 27).



Source: Bureau for Labor Statistics
Quarterly Census of Employment and Wages

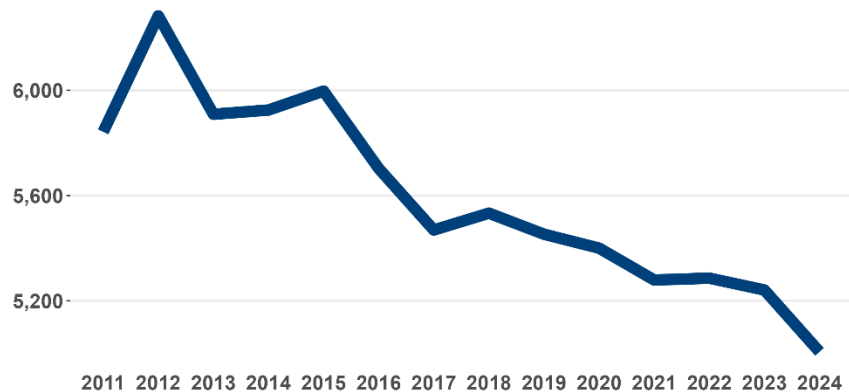
Figure 27. Number of Childcare Workers

In summary, kindergarten and first-grade enrollments in the ESP service area have declined in parallel with the four-year-old population, while Pre-K enrollments remained stable, indicating continued demand for early childcare services. The number of childcare workers and establishments has remained relatively steady since 2016, with Russell (AL) experiencing consistent annual growth in both measures.

Components of Population Change in the ESP Service Area

Natural Change

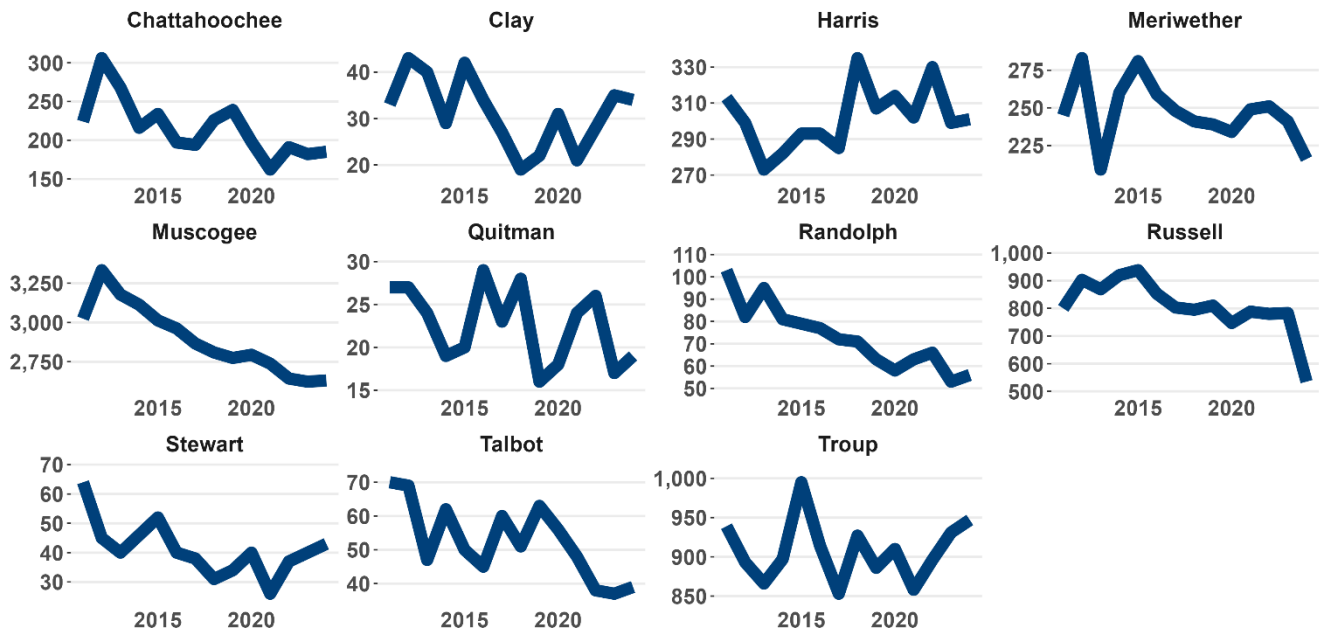
A service area's population can change in three ways: births, deaths, and migration. Considered together, births and deaths are called "natural change," where an area's overall natural change is equal to the number of births minus the number of deaths over a given period. Following the



Source: US Census Bureau Population Estimates Program Vintages 2019 (2010-2019), 2020 (2020), and 2024 (2021-2024)

Figure 28. Births

statewide pattern, births in the ESP service area declined steadily from 5,842 in 2011 to 5,006 in 2024, a 14.3% decrease (Figure 28). This decline occurred in all counties, with Muscogee county experiencing a pronounced decrease in births since 2012 (Figure 29). As with the total population, most births occurred in the most populous counties: Muscogee, Troup, and Russell (AL).



Source: US Census Bureau Population Estimates Program Vintages 2019 (2010-2019), 2020 (2020), and 2024 (2021-2024)

Figure 29. Births by County, 2010 - 2024

The second component of natural change, deaths, rose from 3,769 annually in 2011 to 4,594 in 2024, a 21.9% rise. Deaths spiked above 5,300 in 2021 and 2022 due to the COVID-19 pandemic before declining in 2023 and resuming the prior upward trend. This pattern aligns with the service area's aging population, as a higher proportion of elderly residents contributes to increased annual deaths.

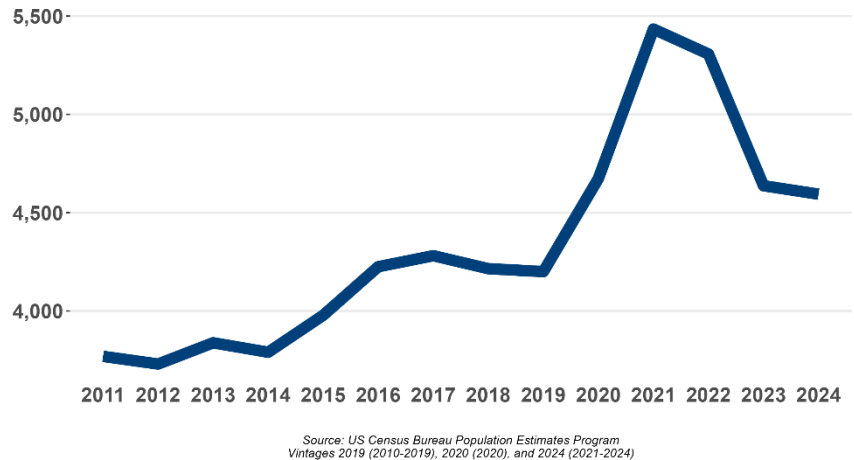


Figure 30. Deaths

Figure 31 combines births and deaths, showing natural change in the service area. Natural change remained positive in all years except 2021 and 2022, reflecting the pandemic-related increase in deaths. Overall, natural change declined sharply from 2,553 in 2012 to 412 in 2024, an 84% decrease.

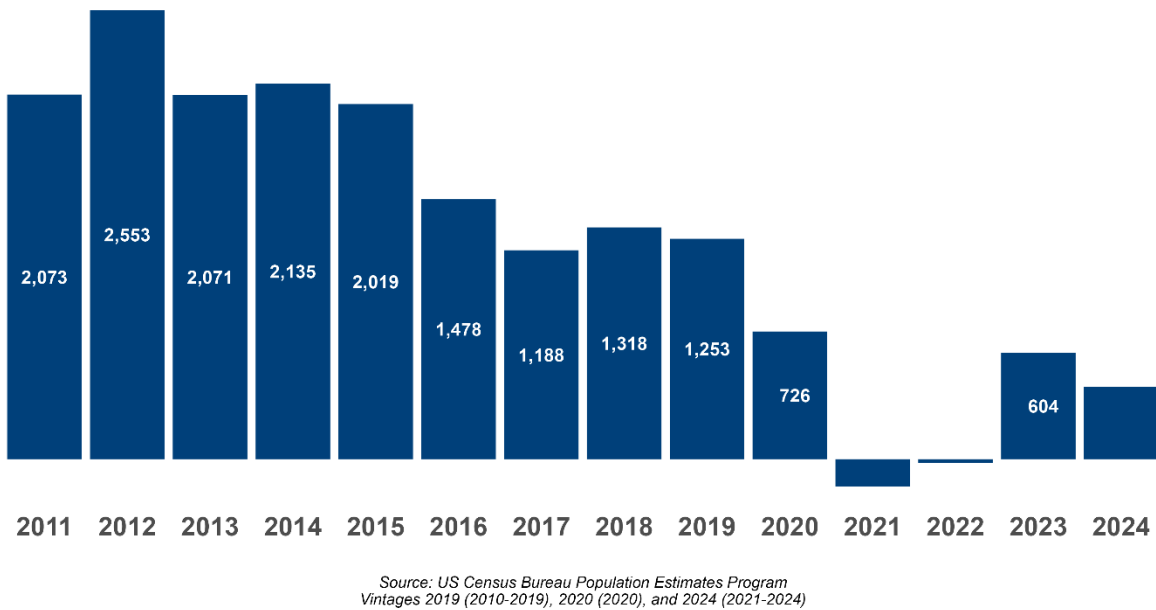


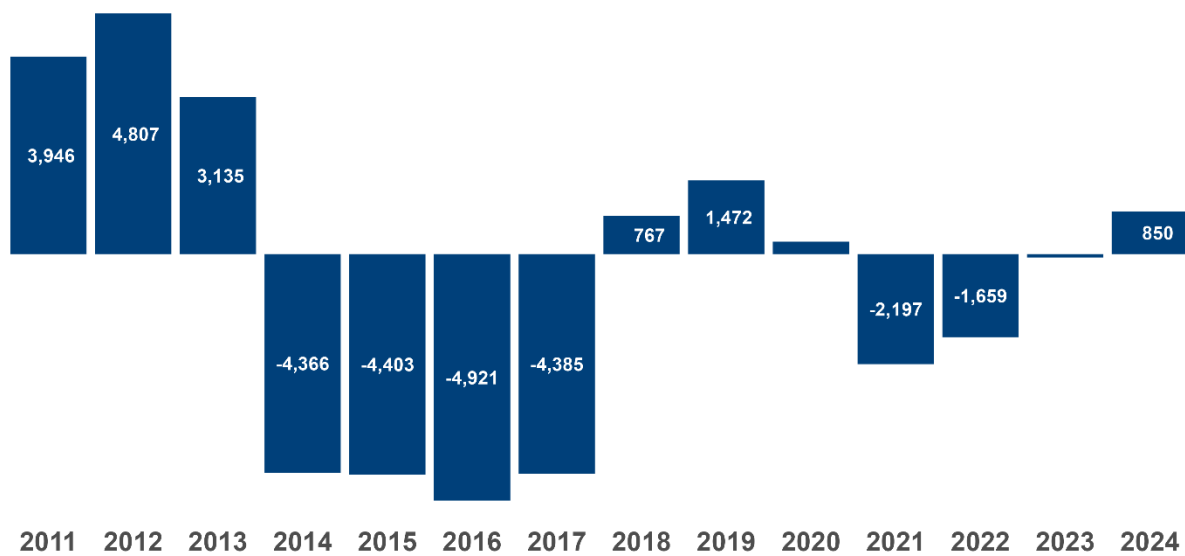
Figure 31. Natural Change

Taken together, births in the ESP service area have declined since 2011, particularly in Muscogee County, while deaths have increased as the population ages, peaking in 2021 during the COVID-19 pandemic. Although births exceeded deaths in non-pandemic

years, natural change declined steadily from 2,553 in 2012 to 412 in 2024. These trends contribute to the reduction in the population of children ages zero to four, as declining births result in fewer young children entering the population.

Mobility and Migration

As natural change declines in many areas, including the ESP service area, migration increasingly contributes to population change. Net migration measures the difference between the number of people moving into and out of an area each year, including both domestic and international migration. Between 2011 and 2013, the service area experienced positive net migration, followed by negative net migration from 2014 to 2017. From 2018 onward, net migration stabilized, fluctuating modestly between small positive and negative values (Figure 32).

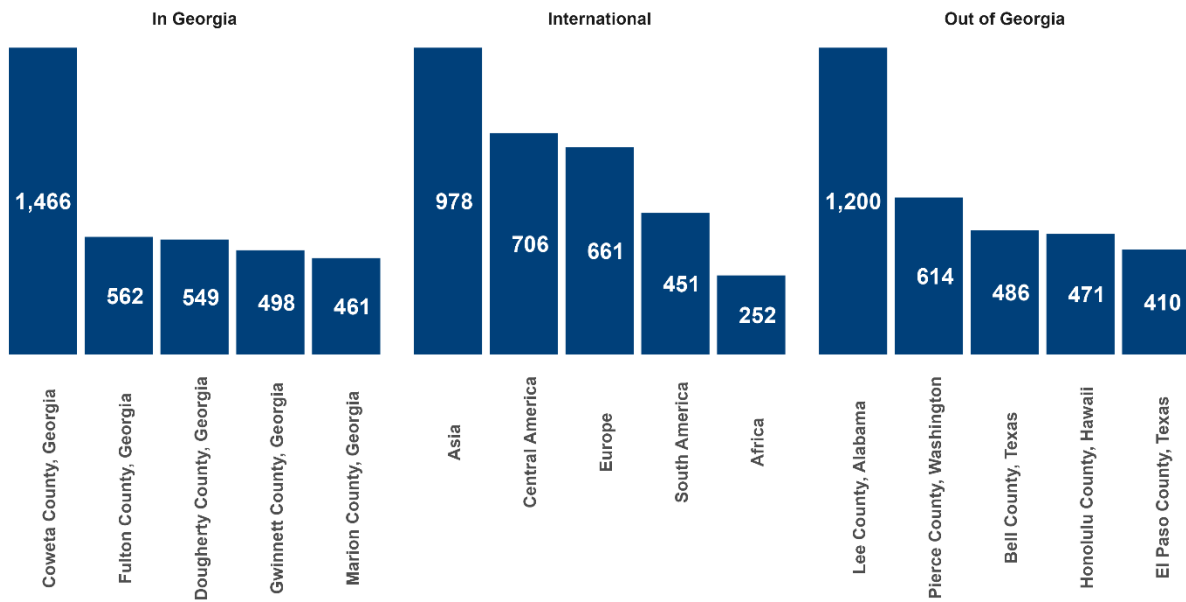


Source: US Census Bureau Population Estimates Program Vintages 2019 (2010-2019), 2020 (2020), and 2024 (2021-2024)

Figure 32. Net Migration to/from Service Area

Migration to and from the ESP service area can be analyzed in greater detail using the US Census Bureau’s Migration Flows estimates, which are based on the ACS and estimate the number of people moving between US counties and from international origins. The most recent county-to-county data cover 2016-2020, and these estimates may not fully capture current migration patterns.

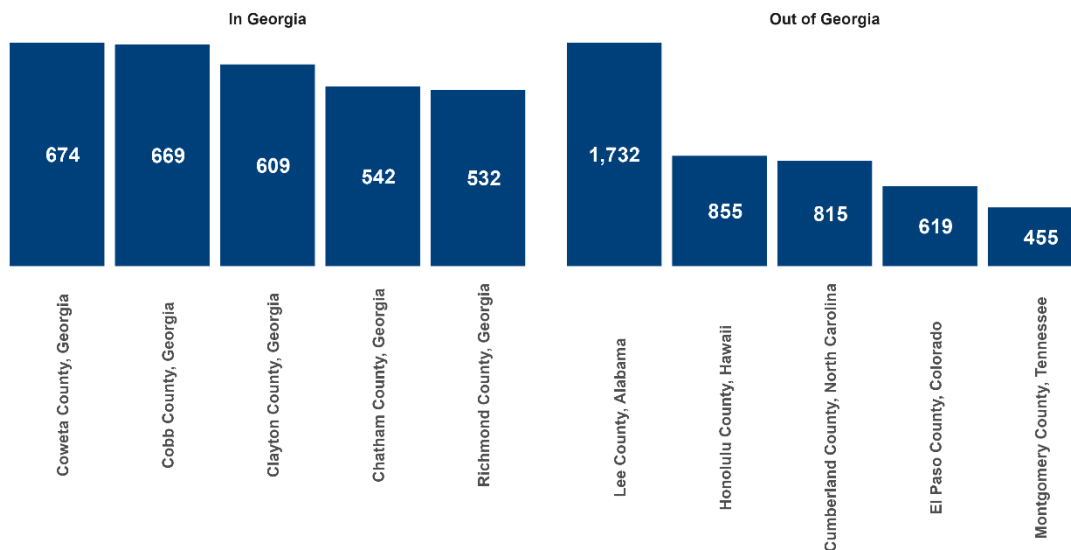
Figure 33 presents the primary sources of in-migration to the ESP service area. The largest in-state sources were Coweta, Fulton, Dougherty, Gwinnett, and Marion counties in Georgia. Major out-of-state sources included Lee County, Alabama; Pierce County, Washington; Bell County, Texas; Honolulu County, Hawaii; and El Paso County, Texas. International in-migration primarily originated from Asia, Central America, and Europe.



Source: US Census Bureau, American Community Survey Migration Flows, 2017-2021

Figure 33. Top Origins for People Moving into the ESP Service Area

Figure 34 presents the primary destinations for residents leaving the ESP service area. Many of the largest in-state destinations correspond to the largest sources of in-migration, including Coweta, Cobb, Clayton, Chatham, and Richmond counties. Major out-of-state destinations include Lee County, Alabama; Honolulu County, Hawaii; Cumberland County, North Carolina; El Paso County, Texas; and Montgomery County, Tennessee. International destinations are excluded, as the US Census Bureau does not track out-migration from the United States.

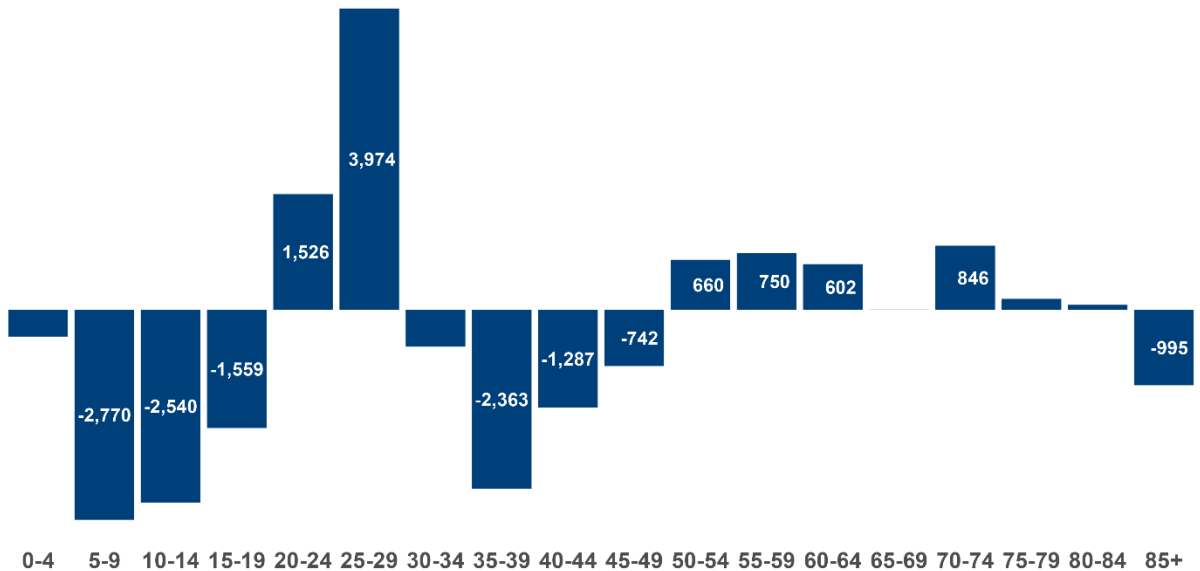


Source: US Census Bureau, American Community Survey Migration Flows, 2017-2021

Figure 34. Top Destinations for People Moving Out of ESP Service Area

Migrant Characteristics

Migration also varies significantly by demographic and social characteristics. Figure 35 presents estimated net migration by age for the ESP service area, based on Wisconsin Applied Population Laboratory data derived from decennial Censuses. From 2010 to 2020, net in-migration was highest for individuals aged 20-24 and 25-29, while net out-migration was greatest for those aged zero-19 and 30-49. Individuals aged 50-84 exhibited modest positive net migration, whereas those aged 85 and older showed modest negative net migration. These patterns suggest that most net in-migrants were young adults, while net out-migrants included children and individuals aged 30-49.



Wisconsin Applied Population Laboratory Net Migration Estimates

Figure 35. Net Migration by Age, 2010-2020

The American Community Survey’s geographic mobility data measure where individuals resided one year prior. These data indicate whether residents of the ESP service area did not move, moved within their county, relocated elsewhere within the state, or moved out of state. According to the 2019-2023 ACS, the majority of residents —approximately 85% — changed their residence within these categories over the one-year period.

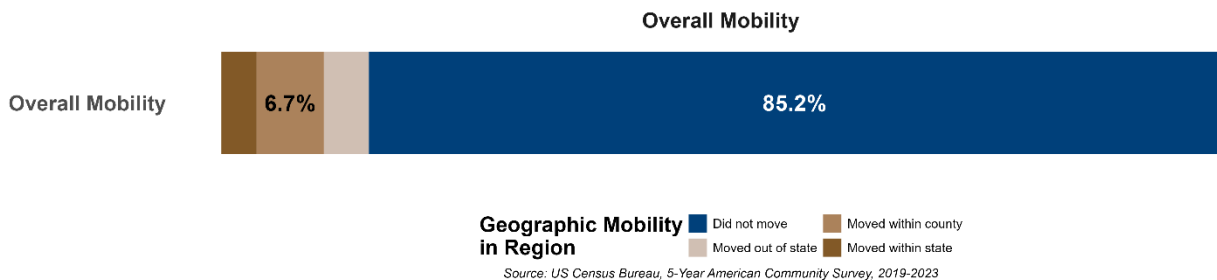
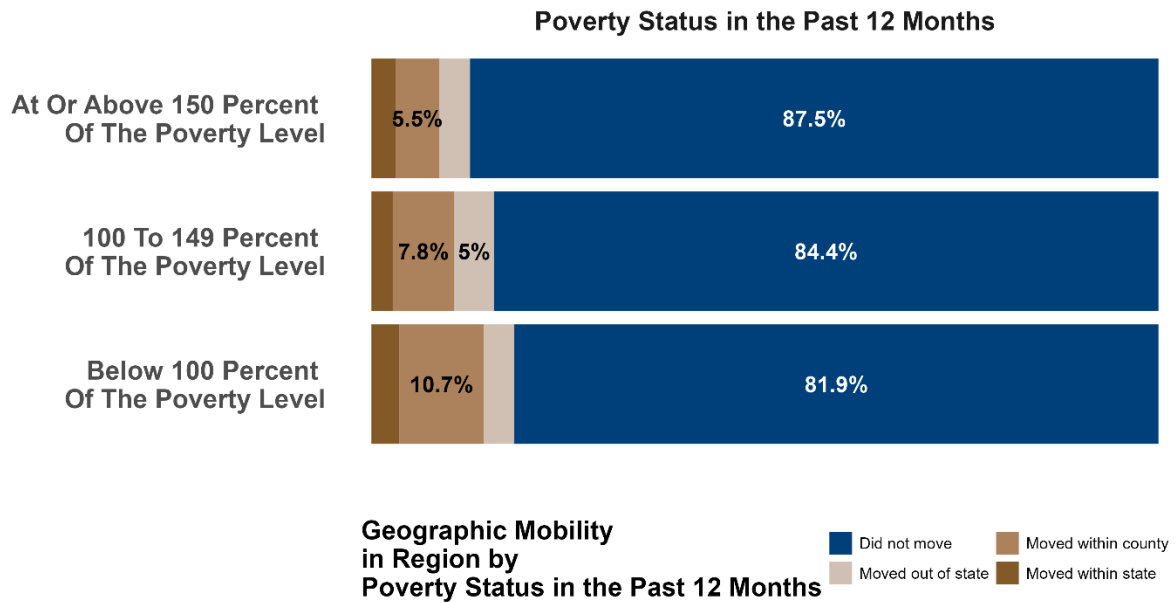


Figure 36. Geographic Mobility

Geographic mobility in the ESP service area varies by socioeconomic and demographic characteristics. Residents below the poverty line exhibited higher rates of mobility than those above the poverty line, meaning people in poverty were more likely to move than those who are above the poverty line (Figure 37). Similarly, renters were more likely to have moved within the past year compared to homeowners (Figure 38). These trends might be expected of these populations due to the increased housing insecurity consequent of poverty.



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 37. Geographic Mobility by Poverty Status

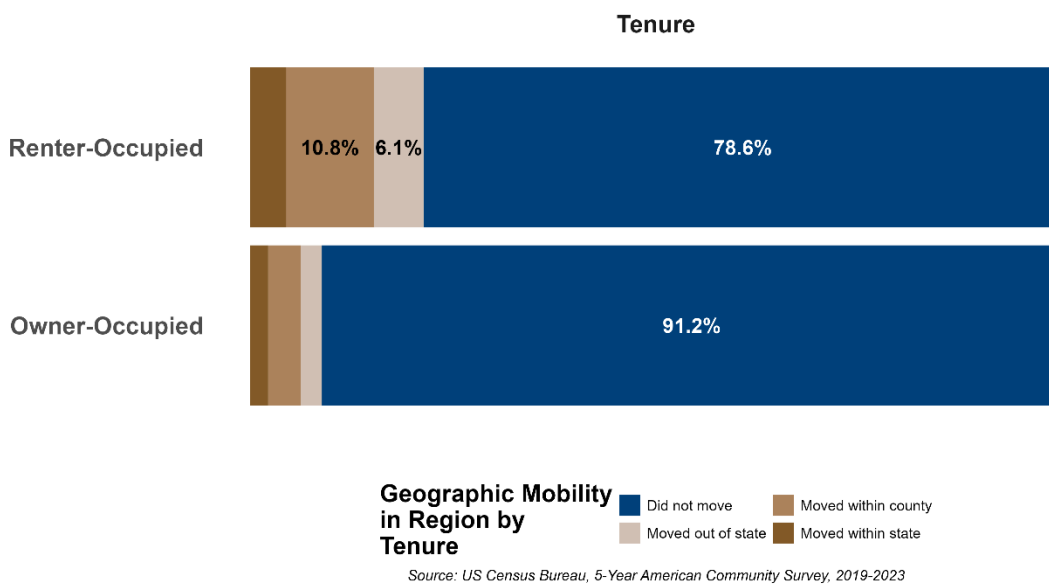
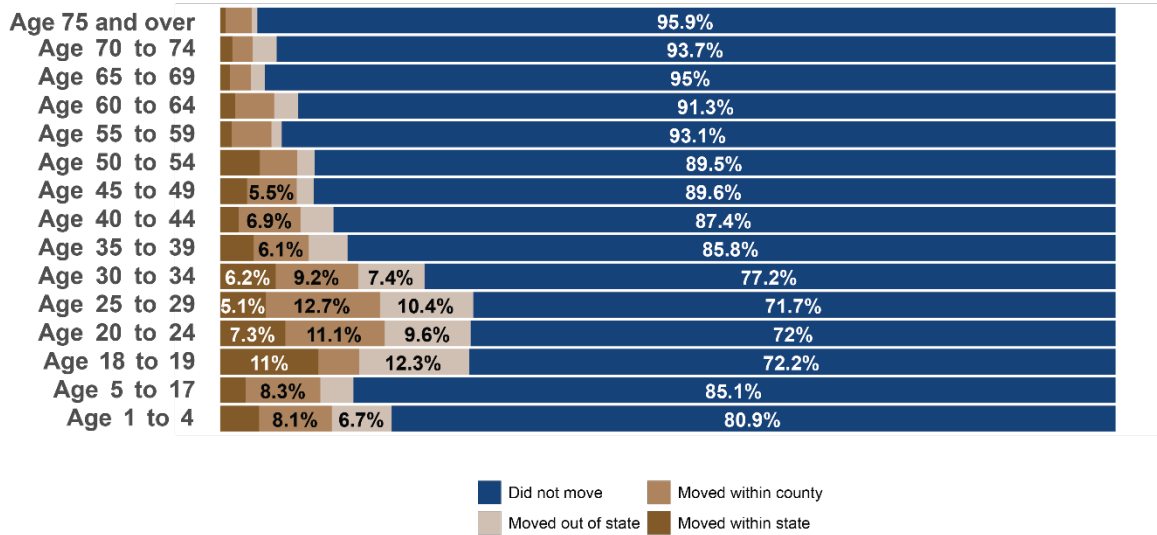


Figure 38: Geographic Mobility by Housing Tenure

Geographic mobility also varies by age, with younger individuals exhibiting higher rates of mobility than older individuals (Figure 39). Mobility is highest among those aged 18-34 and declines steadily with increasing age, with older age groups less likely to have moved within the past year.

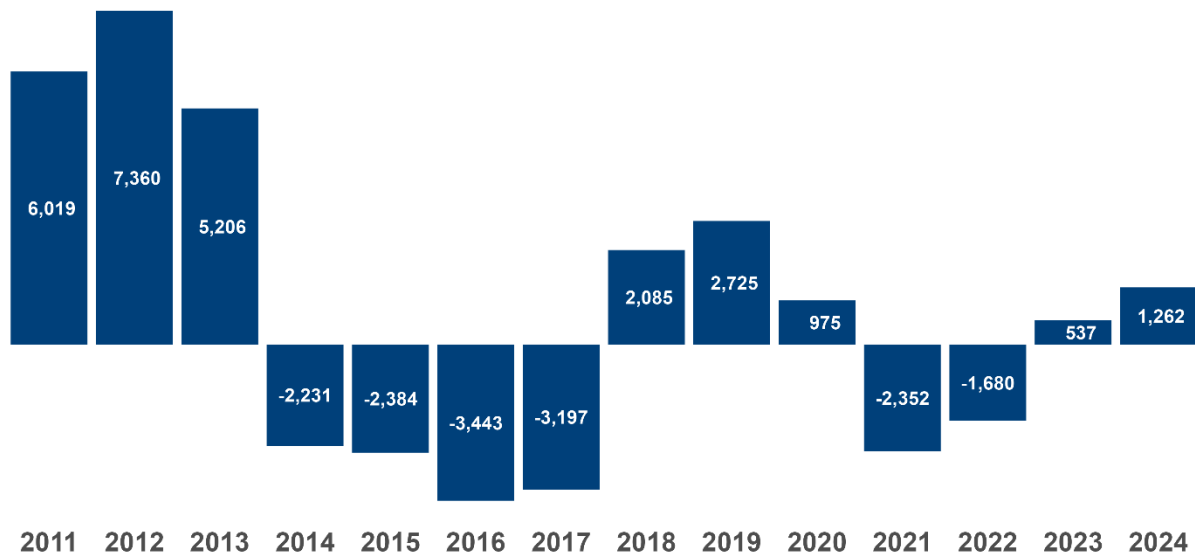


Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 39. Geographic Mobility by Age

Overall Population Change

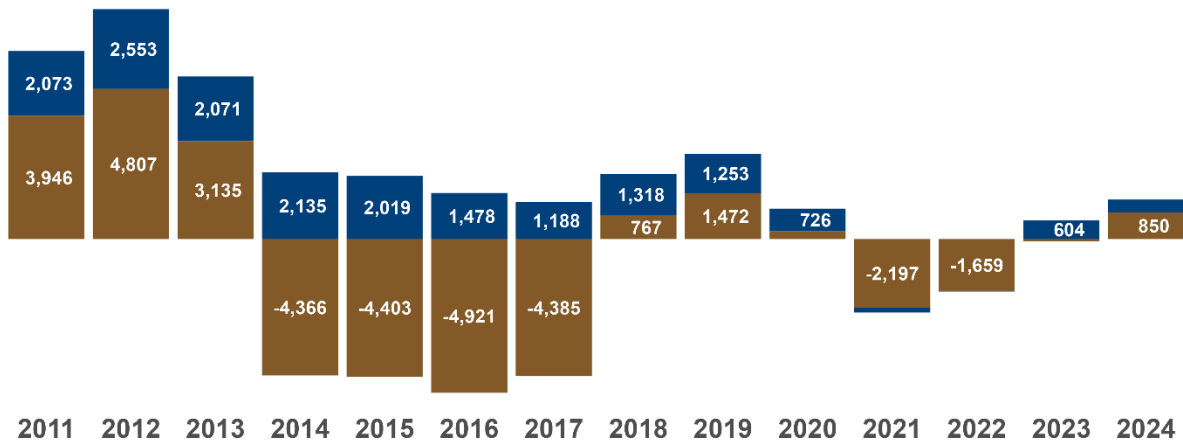
Combining births, deaths, and migration produces annual estimates of total population change in the ESP service area (Figure 40). These estimates closely track trends in net migration, with modest upward adjustment from natural increase, indicating that net migration accounts for a substantial share of overall population change in the service area.



Source: US Census Bureau Population Estimates Program
Vintages 2019 (2010-2019), 2020 (2020), and 2024 (2021-2024)

Figure 40: Overall Population Change by Year

Figure 41 dissects population change in the ESP service area into components. This breakdown shows that overall population trends are primarily driven by net migration. Natural change remained positive in nearly all years from 2011 to 2024, except 2021 and 2022, when deaths exceeded births during the COVID-19 pandemic. Population decline between 2014 and 2017 occurred despite positive natural change and was driven by substantial net out-migration, which exceeded natural increase in those years. In years of population growth, increases coincided with positive net migration rather than with natural change alone.



Population Change Over Time By Component

- Natural Change
- Net Migration

Source: US Census Bureau Population Estimates Program Vintages 2019 (2010-2019), 2020 (2020), and 2024 (2021-2024)

Figure 41: Population Change over Time by Component

In summary, although rates of natural change have declined in the ESP service area, periods of population growth have occurred due to positive net migration. Conversely, periods of population decline have resulted from net out-migration, indicating that migration is the primary driver of overall population change. The resulting year-to-year variability in population change helps explain recent population stagnation, as neither sustained growth nor sustained decline has occurred.

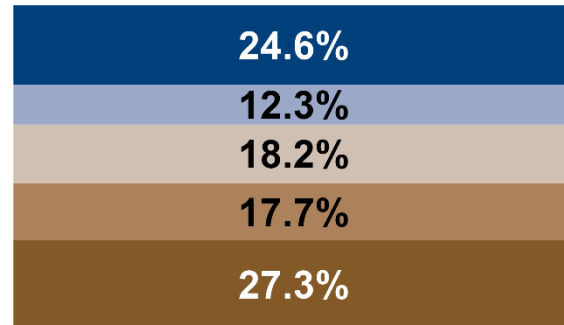
Income and Industry

Income

Approximately 45% of households earn \$49,999 or less annually in the service area, including nearly 30% with incomes below \$30,000 (Figure 42). At the upper end of the distribution, close to one quarter of households report annual incomes of \$100,000 or more. The overall pattern reflects a broad spread of household incomes across the service area.

Across the ESP service area, nearly half of the counties have an annual median household income of at least \$50,000. Counties with the lowest median incomes are generally located in the southern portion of the service area (Figure 43). Troup, Harris, Muscogee, and adjacent counties, excluding Talbot, have some of the highest median incomes in the service area. Although Muscogee contains more than half of the service area population, Harris County is the only county in the service area with a median household income exceeding \$80,000. For context, in 2023, Georgia’s median household income was \$74,664, placing Harris County above the state median and most other counties in the service area below Harris County.

In most counties, households earning less than \$30,000 annually represent the largest share, particularly in Randolph, Quitman,



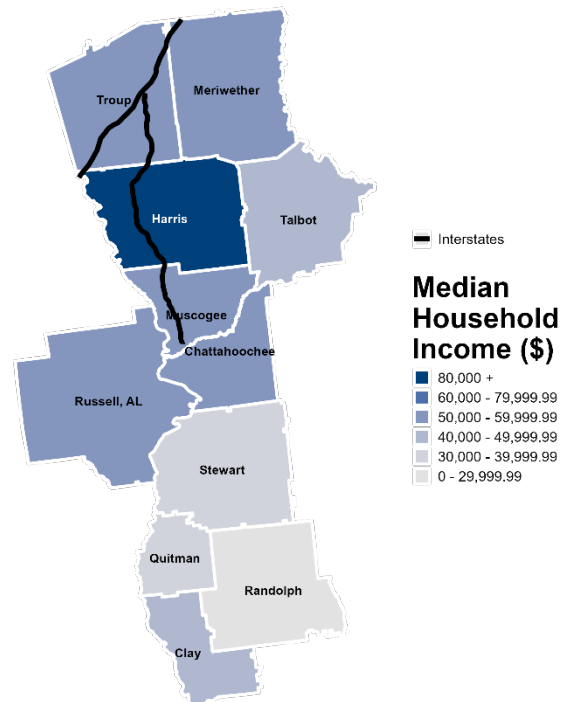
Service Area

Percent of Households Making Annual Household Income

- \$100,000+
- \$75,000 - \$99,999
- \$50,000 - \$74,999
- \$30,000 - \$49,999
- Less than \$30,000

Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 43. Median Household Income Distribution, 2019-2023

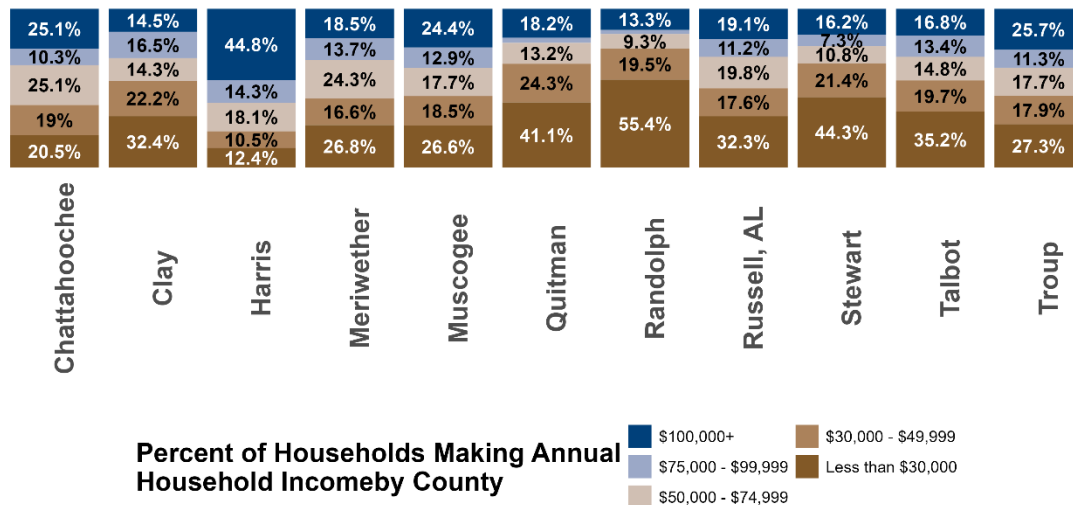


Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 42. Median Household Income by County

and Stewart counties, where lower-income households account for much of the county population. Higher-income households earning \$100,000 or more comprise a smaller share across the region, with relatively larger proportions observed in Harris, Chattahoochee, and Troup counties. Middle-income brackets (\$30,000–\$74,999) make up a sizable portion of households in each county, though their relative share varies.

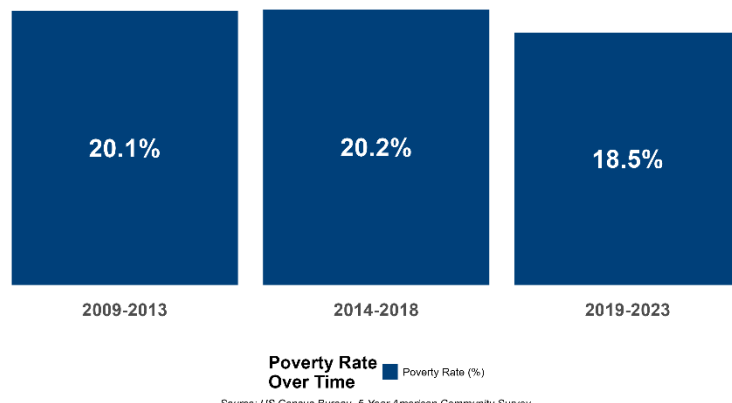
Figure 44 exhibits that Harris County continues to hold the highest concentration of upper-income households, with nearly half of households earning \$100,000 or more annually. Several other counties also display notable shares of higher-income households; at least 30% of households in Chattahoochee, Clay, Meriwether, Muscogee, Russell, and Troup Counties earn \$75,000 or more. Muscogee and Troup have similar distributions at both the lower and upper ends of the income spectrum, with only a 2.2 percentage point difference between the share of households earning under \$30,000 and the share earning \$100,000 or more in Muscogee, and a 0.6 percentage point difference between the same brackets in Troup.



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 44. Annual Household Income Distribution by County

In contrast, Randolph County has a substantially higher share of lower-income households, with well over half of households earning less than \$30,000 annually. Additionally, in Clay, Quitman, Stewart, and Talbot Counties, at least half of their households earn below \$50,000 per year.

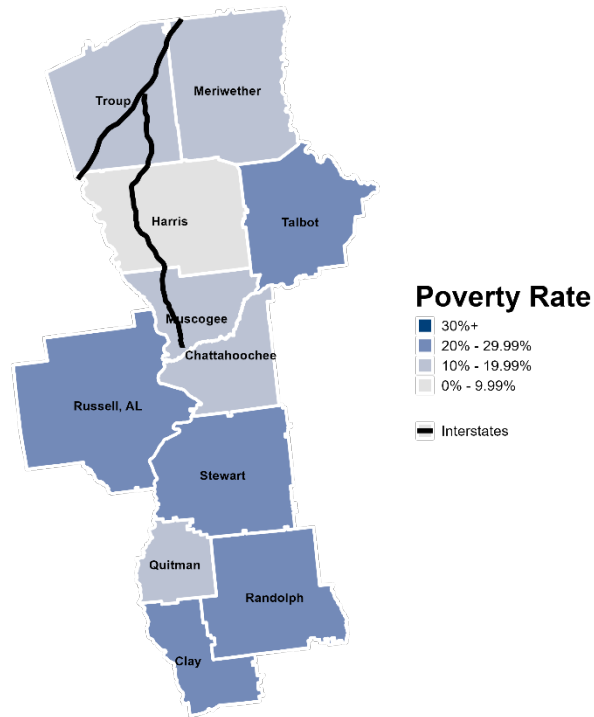


Source: US Census Bureau, 5-Year American Community Survey, 2019-2023, 2014-2018, and 2009-2013

Figure 45. Service Area Poverty Rate Over Time

Across the three time periods shown in Figure 45, there was relatively modest variation in the service area’s poverty rate. The poverty rate was approximately 20% during 2010-2014, and 20% during 2015-2019, indicating little change between these periods. In the most recent period, 2019-2023, the poverty rate shifted to 19%, the lowest it has been in over a decade.

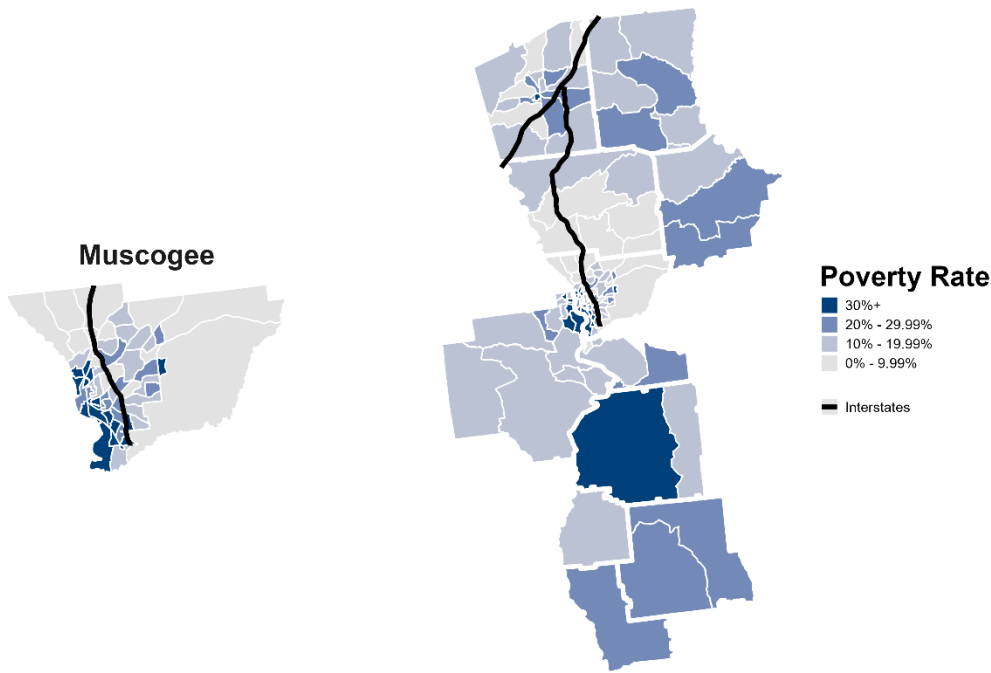
The counties that fall in the highest poverty rate categories include Stewart, Clay, Randolph, Russell (AL), and Talbot, indicating that a significant share of their residents experience economic hardship. In contrast, Harris County stands out with the lowest poverty rate in the service area, which aligns with the persistence of high-income earners. Meriwether and Muscogee, albeit with double-digit poverty rates, display comparatively lower levels of poverty than most of the surrounding counties. Overall, the distribution shows that higher poverty rate variation occurs at the county level rather than in distinct portions of the service area.



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023
 Figure 46. Poverty Rate by County

At the tract level, the map reveals substantial variation of poverty within the service area, both across and within counties. Across the service area, tracts with poverty rates of 30% or higher are primarily in the southern portion of the service area and in smaller tracts in Muscogee County. These higher-poverty tracts are surrounded by moderate and lower poverty areas, signaling vast differences in economic conditions within individual counties.

Outside Muscogee County, large portions of Stewart, Randolph, and Clay Counties contain tracts with poverty rates of 20% and higher, consistent with county-level patterns observed previously. Conversely, multiple tracts in Harris and Meriwether experience lower poverty rates, consistent with their relatively higher median household incomes and lower unemployment levels.



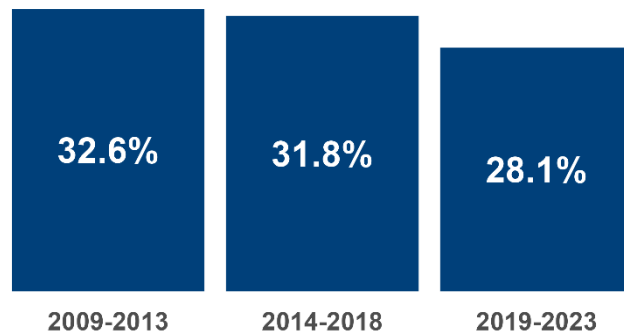
Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 47. Poverty Rate by Tract

Child poverty rates (for those under age six) have gradually declined in the service area, from 33% in 2009-2013 to 28% in 2019-2023. This initial decline was followed by a more pronounced decline to 28% in 2019-2023. While child poverty remained elevated throughout the period, the overall trend indicates a sustained reduction over the past decade, with the lowest rate observed in the most recent period. Despite this shift, child poverty rates remained higher than the service area poverty rate of 19% from 2019-2023.

Similar to service area poverty patterns, child poverty varies across the service area.

Counties with higher overall poverty also tend to have higher child poverty, though the intensity of child poverty is more pronounced in several locations. Of the eleven counties in the service area, seven counties,



Poverty Rate Over Time (Under 6)
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023, 2014-2018, and 2009-2013

Figure 48. Child Poverty Rate Over Time

most in the south of the service area — Meriwether, Talbot, Russell (AL), Stewart, Quitman, Clay, and Randolph — show the highest child poverty rates. These patterns align with the poverty concentration observed in the overall population of the service area. This indicates that elevated poverty among young children is present across several communities in those parts of the service area.

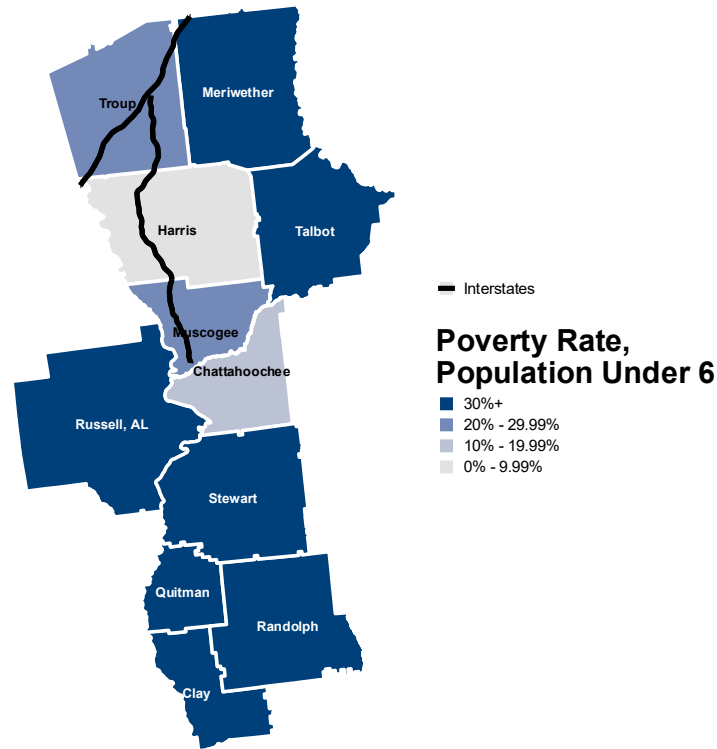


Figure 49. Child Poverty Rate by County

Finally, poverty rates for those aged 65 and older were analyzed. Unlike child poverty, those aged 65 and older experienced an increase in poverty rates from 19% in 2009-2013 to 22% in 2019-2023.

Among the service area population, those aged 65 and over experienced increasing poverty rates in the most recent years, 2019-2023. The senior poverty rate

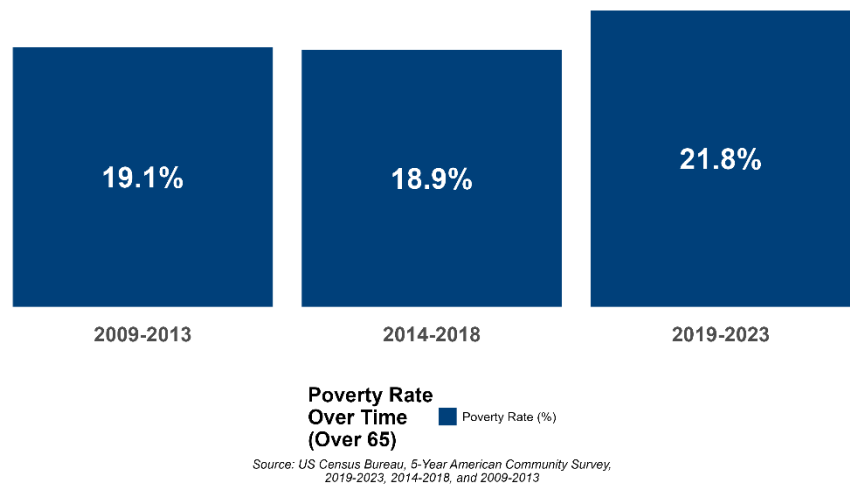
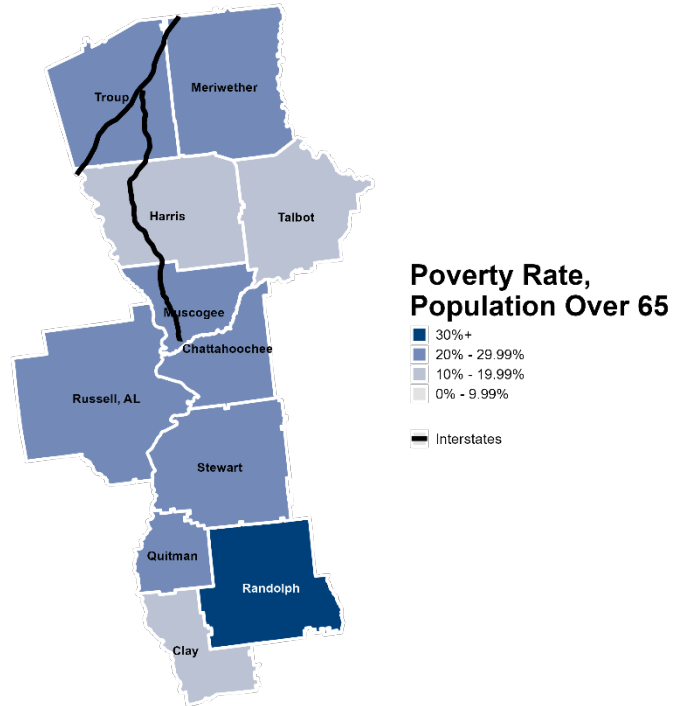


Figure 50. Senior Poverty Rate by Time Period

in the service area has fluctuated modestly across the time periods, showing no sustained directional trend.

The service area overall shows relatively elevated levels of poverty among the senior population. Randolph County has the largest share of seniors living in poverty in the service area, with poverty rates of 30% or more. Several other counties in the service area also have high poverty rates, in the 20%-29% range, namely Russell (AL), Quitman, Stewart, Muscogee, Chattahoochee, Troup, and Meriwether. In contrast, Harris, Talbot, and Clay exhibit comparatively lower levels of poverty, and despite this, there are no counties in the service area with single-digit senior poverty rates. Overall, the southern and southwestern counties in the service area face the highest poverty rates.



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023
Figure 51. Senior Poverty Rate by County

Industry

This section examines industry dynamics within the ESP service area. Table 2 reports the industries with the largest number of jobs. Table 3 highlights the industries experiencing the fastest employment growth, while Table 4 represents the industries with the most rapid employment declines.

Table 2. Service Area Industry Overview, Enrichment Services Area

Description	Jobs, 2019	Jobs, 2024	% Change, 2019-2024
Federal Government, Military	23,002	19,608	-14.8%
Restaurants and Other Eating Places	13,626	13,798	1.3%
Education (Local Government)	10,141	9,701	-4.3%
Local Government, Excluding Education and Hospitals	7,718	7,546	-2.2%
Federal Government, Civilian, Excluding Postal Service	6,447	6,447	0.0%
General Medical and Surgical Hospitals	5,624	5,747	2.2%
Offices of Physicians	4,716	5,290	12.2%
Warehouse Clubs, Supercenters, and Other General Merchandise Retailers	4,146	3,909	-5.7%
Automobile and Light Duty Motor Vehicle Manufacturing	2,745	3,761	37.0%
Temporary Help Services	6,104	3,608	-40.9%
Supermarkets and Other Grocery (except Convenience) Stores	2,405	2,816	17.1%
General Warehousing and Storage	2,325	2,681	15.3%
Hotels (except Casino Hotels) and Motels	2,539	2,492	-1.9%
Insurance Agencies and Brokerages	850	2,411	183.5%
Investigation, Guard, and Armored Car Services	1,780	2,373	33.3%
Education (State Government)	2,693	2,313	-14.1%
Financial Transactions Processing, Reserve, and Clearinghouse Activities	4,971	2,257	-54.6%
Aerospace Product and Parts Manufacturing	2,086	2,220	6.4%
Religious Organizations	2,544	2,185	-14.1%
Carpet and Rug Mills	2,119	2,137	0.8%

In Table 2, the largest industries in the service area showed a largely stable employment structure between 2019 and 2024, with shifts concentrated in a subset of sectors. Federal Government-Military remained the largest employer despite a 14.8% decline, while Restaurants and Other Eating Places experienced minimal change and continued to rank among the top industries. Public-sector education and local government industries experienced modest declines, whereas health care-related industries added jobs over the period. Relative changes occurred in select industries, with strong growth in Insurance Agencies and Brokerages and Automobile and Light Duty Motor Vehicle Manufacturing, alongside sharp declines in Temporary Help Services and Financial Transactions Processing activities.

Table 3. Fastest Growing Industries, Enrichment Services Program

Description	Jobs, 2019	Jobs, 2024	% Change, 2019-2024
Insurance Agencies and Brokerages	850	2,411	183%
Automobile and Light Duty Motor Vehicle Manufacturing	2,745	3,761	37%
Other Motor Vehicle Parts Manufacturing	591	1,344	127%
Motor Vehicle Seating and Interior Trim Manufacturing	1,378	2,060	49%
Investigation, Guard, and Armored Car Services	1,780	2,373	33%
Offices of Physicians	4,716	5,290	12%
Supermarkets and Other Grocery (except Convenience) Stores	2,405	2,816	17%
Bread and Bakery Product Manufacturing	151	518	242%
General Warehousing and Storage	2,325	2,681	15%
Motor Vehicle Brake System Manufacturing	709	1,064	50%
Professional Employer Organizations	399	750	88%
Other Outpatient Care Centers	429	779	82%
Motor Vehicle Metal Stamping	145	460	217%
Packaging and Labeling Services	139	433	212%
Engineering Services	889	1,167	31%
General Freight Trucking, Local	66	311	372%
Food Service Contractors	1,161	1,382	19%
Services for the Elderly and Persons with Disabilities	646	847	31%
General Freight Trucking, Long-Distance	536	722	35%
Animal Production	169	355	110%

The fastest-growing industries reflect strong expansion across manufacturing, logistics, and select service sectors, according to Table 3. Several motor vehicle-related manufacturing industries reported substantial employment gains, alongside pronounced growth in Insurance Agencies and Brokerages. Logistics and distribution activities, including general warehousing and both local and long-distance freight trucking, also experienced notable increases. Some industries recorded significant percentage gains from relatively small employment figures, such as Animal Production.

Table 4. Fastest Shrinking Industries, Enrichment Services Program

Description	Jobs, 2019	Jobs, 2024	% Change, 2019-2024
Federal Government, Military	23,002	19,608	-14.8%
Financial Transactions Processing, Reserve, and Clearinghouse Activities	4,971	2,257	-54.6%
Temporary Help Services	6,104	3,608	-40.9%
Direct Life, Health, and Medical Insurance Carriers	3,136	2,037	-35.0%
Motor Vehicle Body and Trailer Manufacturing	743	219	-70.5%
Snack Food Manufacturing	530	23	-95.7%
Telephone Call Centers	616	142	-77.0%
Education (Local Government)	10,141	9,701	-4.3%
Computer Systems Design and Related Services	2,057	1,660	-19.3%
Education (State Government)	2,693	2,313	-14.1%
Religious Organizations	2,544	2,185	-14.1%
Management of Companies and Enterprises	1,847	1,551	-16.0%
Fiber, Yarn, and Thread Mills	633	374	-40.9%
Colleges, Universities, and Professional Schools	1,069	821	-23.1%
Commercial and Institutional Building Construction	725	479	-33.9%
Warehouse Clubs, Supercenters, and Other General Merchandise Retailers	4,146	3,909	-5.7%
Wired and Wireless Telecommunications Carriers (except Satellite)	663	428	-35.4%
Commercial Banking	1,096	862	-21.3%
State Government, Excluding Education and Hospitals	2,230	2,009	-9.9%
Direct Insurance (except Life, Health, and Medical) Carriers	527	312	-40.8%

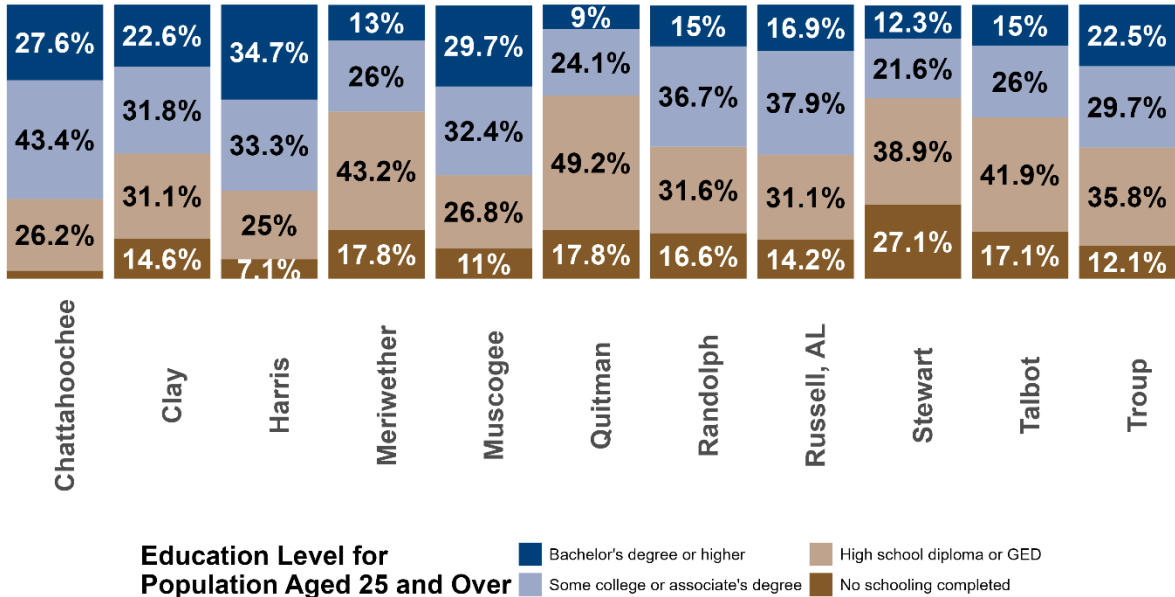
The fastest-shrinking industries include several large employers as well as smaller industries experiencing sharp contractions as shown in Table 4. Federal Government-Military recorded the largest absolute employment decline, while substantial percentage losses were observed in Financial Transactions Processing activities and Temporary Help Services. Several manufacturing and telecommunications-related industries experienced pronounced contractions, including Motor Vehicle Body and Trailer Manufacturing, Snack Food Manufacturing, and Telephone Call Centers. Employment also declined across multiple public-sector education and government categories, and in select financial and professional services industries, indicating the declines were spread across multiple sectors, rather than driven by just one industry.

Educational Attainment

Levels of educational attainment among the population aged 25 and older in the ESP service area vary notably by county, though several common patterns emerge.

Across all counties, the largest share of adults generally has some college or an associate degree and a high school diploma or GED, indicating that most residents have completed at least secondary education but have not attained a bachelor’s degree. The proportion of adults with a bachelor’s degree or higher differs substantially across counties, ranging from comparatively low levels in Quitman and Meriwether counties to more than one quarter of the adult population in Muscogee and Harris counties, reflecting uneven access to or attainment of higher education within the region.

Conversely, the share of adults with no schooling completed remains relatively small across all counties, though it is consistently present. Counties with lower levels of bachelor’s degree attainment tend to have higher proportions of residents whose highest level of education is a high school diploma or some college.

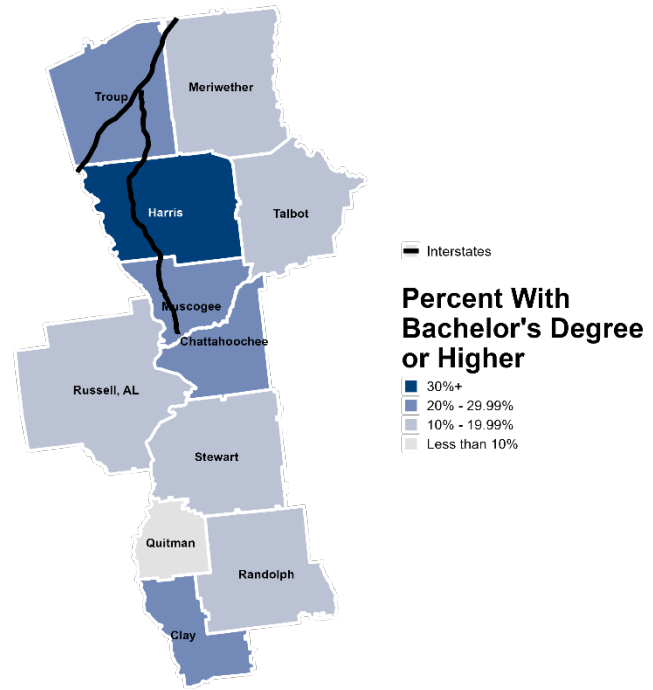


Education Level for Population Aged 25 and Over
 Legend: Bachelor's degree or higher (dark blue), Some college or associate's degree (light blue), High school diploma or GED (tan), No schooling completed (brown)

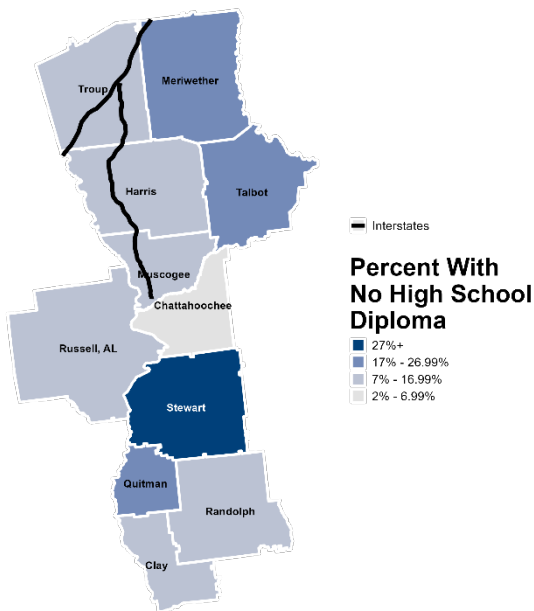
Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 52. Educational Attainment of the Population Age 25 and over

There is substantial variation in the proportion of people who hold a bachelor's degree or higher within the ESP service area. Overall, Harris County has the highest percentage of people holding a bachelor's degree or higher at more than 30%. Troup, Muscogee, Chattahoochee, and Clay counties all stand between 20% and 30% in this category, whereas Meriwether, Talbot, Stewart, Randolph, and Russell (AL) counties are between 10% and 20% of the population holding a bachelor's degree or higher. The county with the lowest percentage of residents who hold a bachelor's degree or higher is Quitman, with under 10% of the population holding such a degree.



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023
 Figure 53. Percent with a Bachelor's Degree or Higher



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023
 Figure 54. Percent Without a High School Diploma

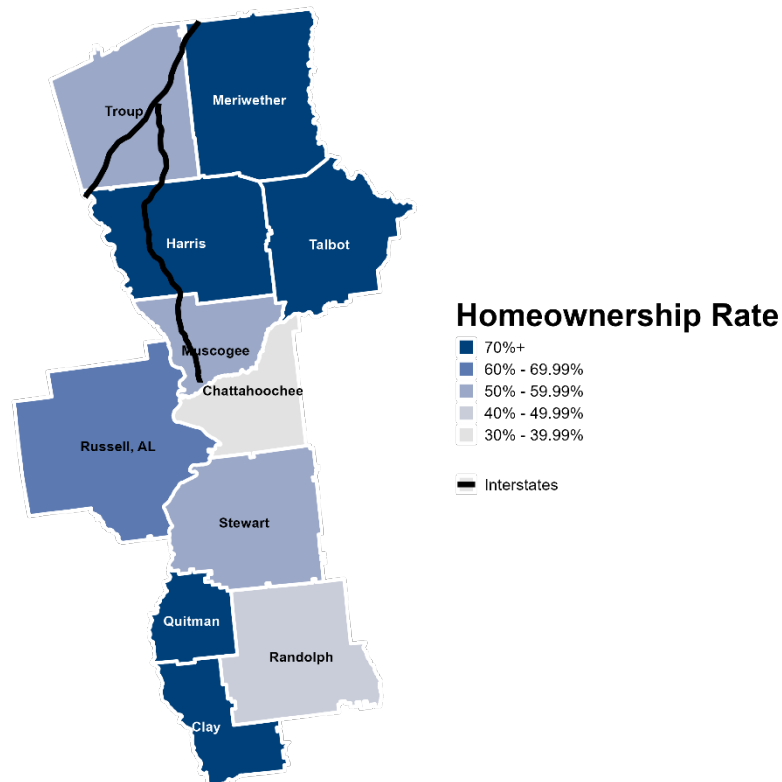
By the same token, the percentage of the population without a high school diploma varies considerably between counties in the service area. Stewart County has the highest proportion of residents without a diploma, at over 27%. Behind Stewart County are Meriwether, Talbot, and Quitman counties, which all stand between 17% and 27%. Troup, Harris, Muscogee, Randolph, Clay, and Russell (AL) counties all fall between 7% and 17% of the population without a high school diploma. Finally, Chattahoochee County has the lowest rate of people without a high school diploma, under 7%.

Housing

Tenure

The ESP service area has a homeownership rate of 57.8%, indicating that 42.2% of households in the region are renters. These statistics are a significant departure from the homeownership rate in the state of Georgia, which has a rate of 65.4% and a renter rate of 44.6%. Homeownership rates in the service area vary by county, ranging from below 40% to above 70%. Higher homeownership rates are concentrated in the northern part of the service area, with at least 80% or more of residents in Harris and Talbot counties being homeowners, and at least 70% of those residing in Meriwether County.

Similar to Meriwether, 70%-79% of residents are homeowners in Quitman and Clay, while relatively lower rates of homeownership, 60%-69%, exist in Russell (AL) County. Troup, Muscogee, Chattahoochee, Stewart, and Randolph Counties see substantially lower homeownership rates compared to the rest of the service area, with no more than 59% of residents being homeowners.



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023
Figure 55. Homeownership Rate by County

Rental rates are the inverse of homeownership rates. In other words, where homeownership rates are high, rental rates are low, and vice versa. Therefore, just as with homeownership, rental rates vary across the service area. In Figure 56, Chattahoochee County reports the highest renter share, exceeding 60%, which aligns with the transient nature of military families and the presence of Fort Benning. Randolph County, where more than 50% of households rent their homes, also has high rental rates. Most other counties in the service area have a relatively lower concentration of renters, particularly in Harris and Talbot Counties.

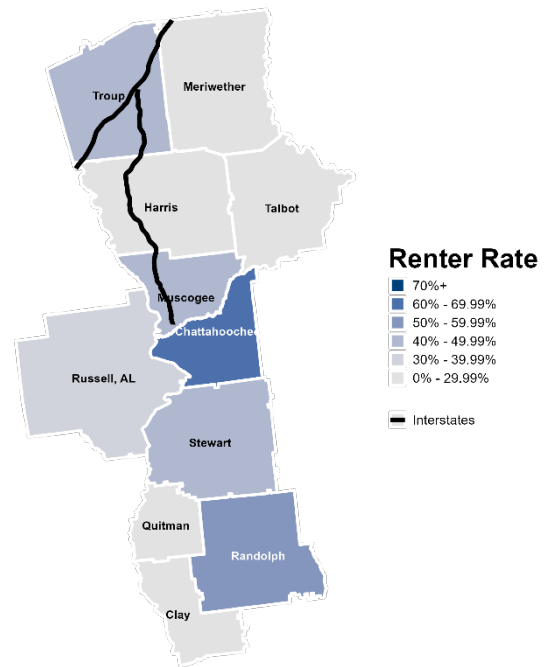


Figure 56. Renter Rate by County
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

In Figure 57, rental rates at the Census tract level reveal a low concentration of renters in the service area, as many tracts have rates less than 39%. In Muscogee County, several central tracts exhibit the highest renter rates, with several tracts exceeding a 70% renter rate, while peripheral tracts see lower renter rates between 30% and 50%. Other tracts, with renter rates of 50% or higher, include parts of Troup and Randolph Counties. Russell (AL), Clay, Quitman, Meriwether, Talbot, and Harris Counties primarily fall within the lower range, with most tracts below 30% and limited presence of higher renter concentrations.

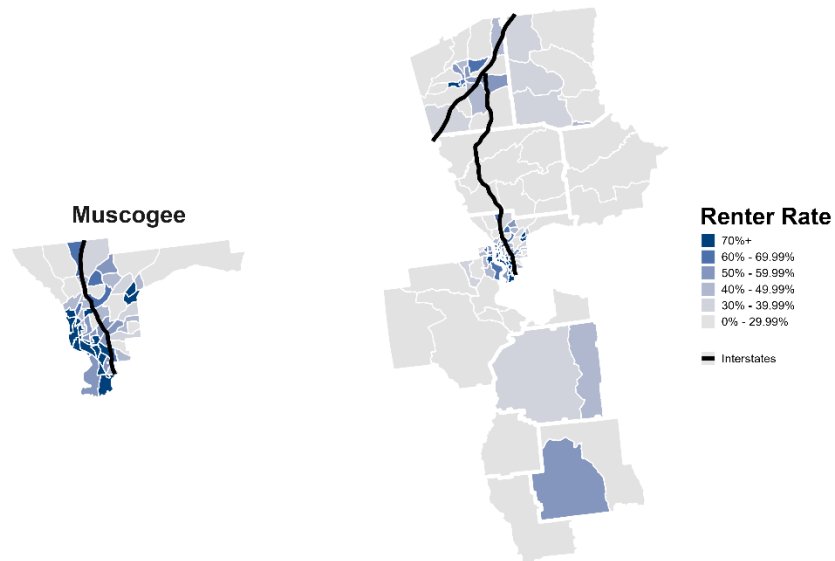
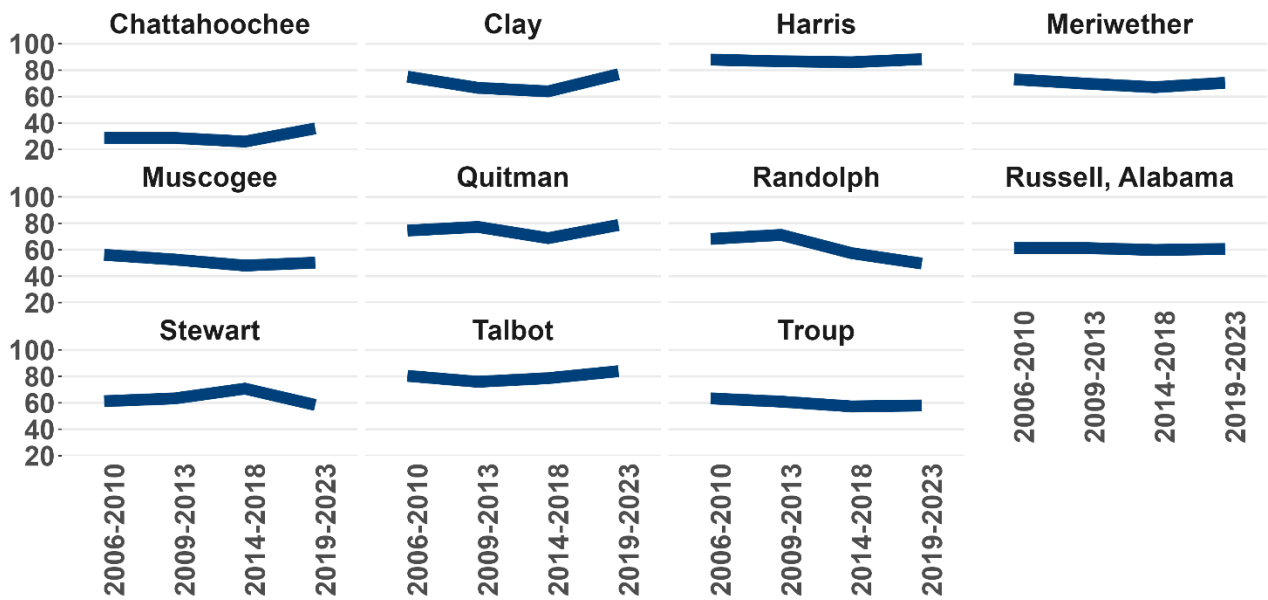


Figure 57. Renter Rate by Tract
 Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 58 shows how county-level homeownership rates change over time. Even with significant macroeconomic shifts in housing markets between 2005 and 2023, county-level homeownership rates are relatively stable across the study period. Harris County, which has high homeownership rates, has maintained homeownership rates above 80% over the past two decades, according to five-year ACS data. Meriwether and Talbot Counties have relatively high homeownership rates but did experience slight declines in the mid-2010s, followed by modest increases in the 2019-2023 five-year ACS. Troup County shows a gradual decline in homeownership, moving from an over 60% homeownership rate in earlier periods to less than 60% in recent years. Stewart and Quitman Counties exhibit similar patterns, with rates fluctuating between approximately 70% and 80%, with downward trends for the former and upward trends for the latter in the latest period. Clay County shows more variation, with rates dipping in 2009-2013 before rising again in 2019-2023 to levels near earlier highs. Randolph County displays a downward trend, falling from around 70% in 2005-2009 to closer to 50% in 2019-2023. Muscogee County maintains lower homeownership rates throughout the period, remaining near 50% with minimal change. Chattahoochee County shows the lowest rates overall, starting below 40% and increasing slightly in the most recent period, again in line with the transient population. Russell (AL) remains relatively stable, with rates near 60% across all periods.

Clay County shows more variation, with rates dipping in 2009-2013 before rising again in 2019-2023 to levels near earlier highs. Randolph County displays a downward trend, falling from around 70% in 2005-2009 to closer to 50% in 2019-2023. Muscogee County maintains lower homeownership rates throughout the period, remaining near 50% with minimal change. Chattahoochee County shows the lowest rates overall, starting below 40% and increasing slightly in the most recent period, again in line with the transient population. Russell (AL) remains relatively stable, with rates near 60% across all periods.



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023, 2014-2018, and 2009-2013

Figure 58. Homeownership Rates by County

Affordability

Households that spend more than 30% of their income on rent or mortgage payments are considered cost-burdened. US Census Bureau data are used to assess housing affordability for all households as well as by housing tenure. This subsection presents cost-burden estimates for all households, followed by results disaggregated by tenure.

In the service area, 29.1% of all households, regardless of tenure type, are considered cost burdened. Additionally, 13.6% of all households in the service area are considered severely cost burdened, meaning residents spend over 50% of their income on housing costs. This percentage is slightly higher than the state of Georgia, where 27.0% of the population spent over 30% on housing costs, and 12.6% spent over 50% on housing costs.

As depicted in Figure 59, Troup and Muscogee counties have the highest share, 30% or more, of cost-burdened households. Russell (AL), Randolph, Chattahoochee, and Meriwether counties have relatively moderate rates of 20%-29% of households being cost-burdened. The service area overall has various concentrations of cost burden among households, without a distinct pattern between low-burden and high-burden counties. Quitman has less than 10% of households spending more than 30% of their income on housing costs, the lowest rate in the service area. Harris, Clay, Talbot, and Stewart counties have relatively low proportions of cost-burdened households as well, with no more than 19% of households in each of these counties spending over 30% of their income on housing costs.

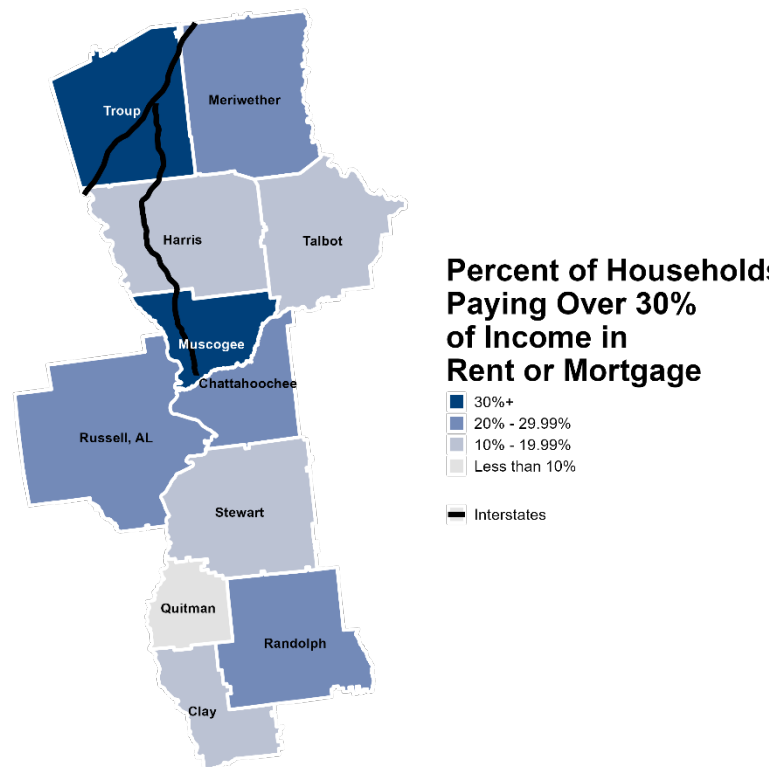
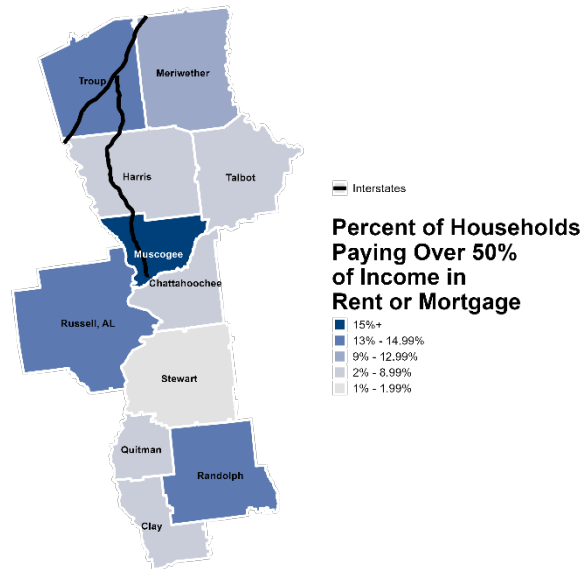


Figure 59. Percent of Households Paying over 30% of Income in Rent or Mortgage

Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

The share of severely cost-burdened households follows a similar geographic trend to cost-burdened households across the service area’s counties, as Figure 60 shows.

Stewart, Quitman, Clay, Chattahoochee, Harris, and Talbot counties all have relatively low severe cost-burdened ratios, all with less than 8.9% of their households paying more than 50% of their income on housing costs. On the other hand, Muscogee has the highest share of severely cost-burdened households at around 14.9% or more. Counties with similarly high cost-burden shares include Russell (AL), Randolph, and Troup counties at 13%-14.9%. Meriwether exhibits moderate rates, 9%-12.9% of households spending over 50% of their income on housing costs.



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023
 Figure 60. Percent of Households Paying over 50% Income in Rent or Mortgage

In the service area, 16.5% of homeowners are considered cost burdened, and about 7% are severely cost burdened. This rate is similar to the state rates, which are 16.2% and 6.6%, respectively. At the county level, Muscogee County reports the highest share of severely cost-burdened homeowners, with more than 8% of households allocating over half of their income toward mortgage costs. Meriwether, Harris, Talbot, Clay, and Russell (AL) follow Muscogee with 6% to 7.9% of homeowners experiencing severe cost burden. Among homeowners in the service area, those residing in Stewart, Chattahoochee, Randolph, Quitman, and Troup are the least severely cost-burdened, with shares of 5.9% or less. Some counties, such as Stewart and Chattahoochee, have significantly low shares that may be almost negligible at 1%.

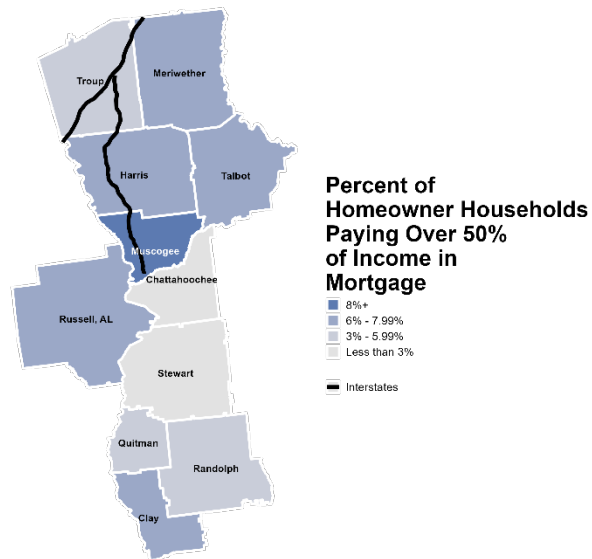
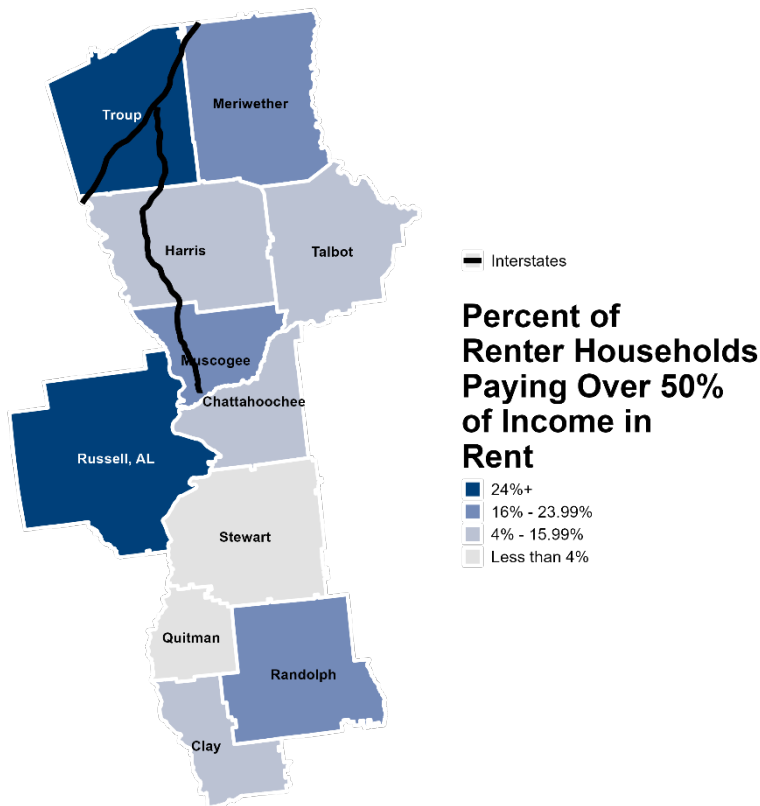


Figure 61. Percent of Homeowners Paying Over 50% of Income in Mortgage

Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Renters experience higher levels of cost burden compared to homeowners. In the service area, 46.2% of renters are considered cost-burdened, and 22.7% are severely cost-burdened. This is a lower or higher rate compared to the state, where data show 47.5% and 24.1% of residents are cost-burdened, respectively. Among renters in the service area, those residing in Russell (AL) and Troup Counties report the highest shares of severe cost burden, with over 23.9% of renter households paying over half their income toward rent. Meriwether, Muscogee, and Randolph report relatively high levels of severe cost burden, falling between 16% and 23.9%. Clay, Chattahoochee, Harris, and Talbot exhibit moderate shares, generally between 4% and 15.9%. Quitman and Stewart Counties display the lowest levels of extreme cost-burdened renters, with values below 4%.

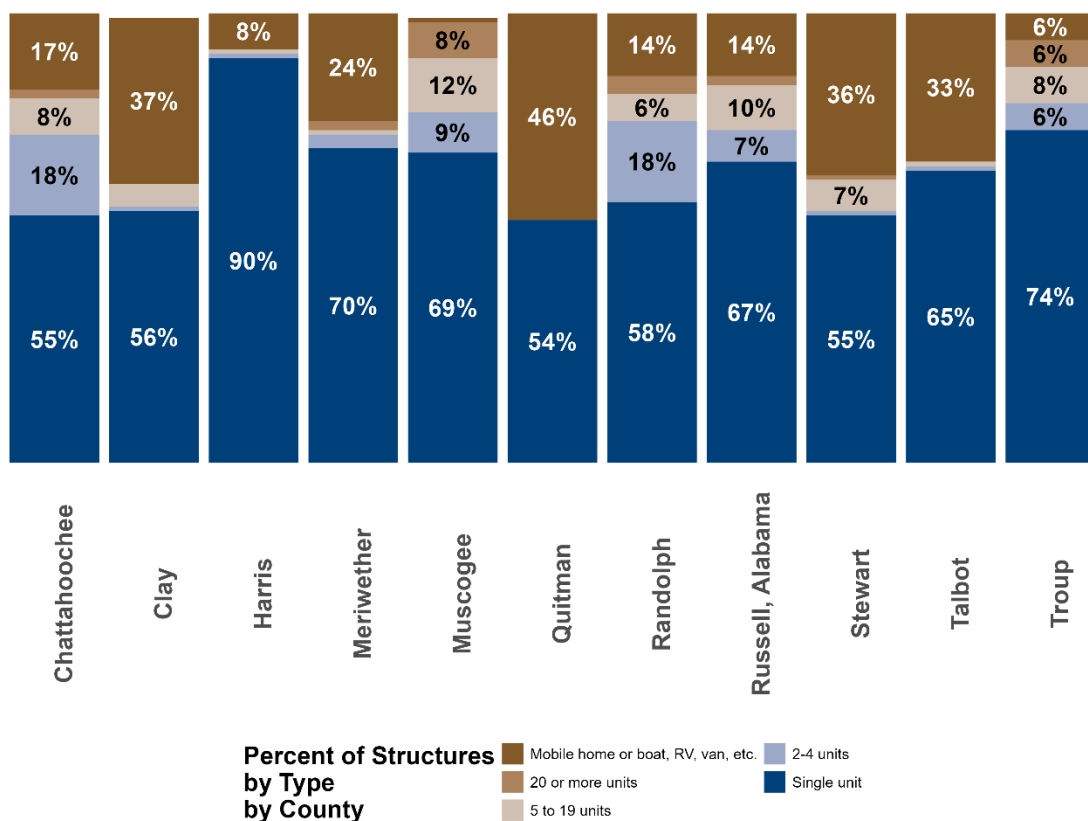


Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 62. Percent of Households Paying over 50% of Income in Rent

Housing Stock

Within the service area, there is a considerable variation in housing structure types, with some structure types dominating across all counties to absent structure types in a handful of counties. Single-family homes are the major housing type in every county, ranging from approximately 54% of housing units in Quitman County to about 90% of units in Harris County. Mobile homes and similar structures account for a substantial share of housing in several counties, particularly in Clay (37%), Stewart (36%), and Talbot (33%). Multi-unit housing structures (including buildings with two-four units, five-19 units, and 20 or more units) represent a smaller portion of the housing stock across most counties, with higher concentrations generally observed in more populated areas such as Muscogee County.

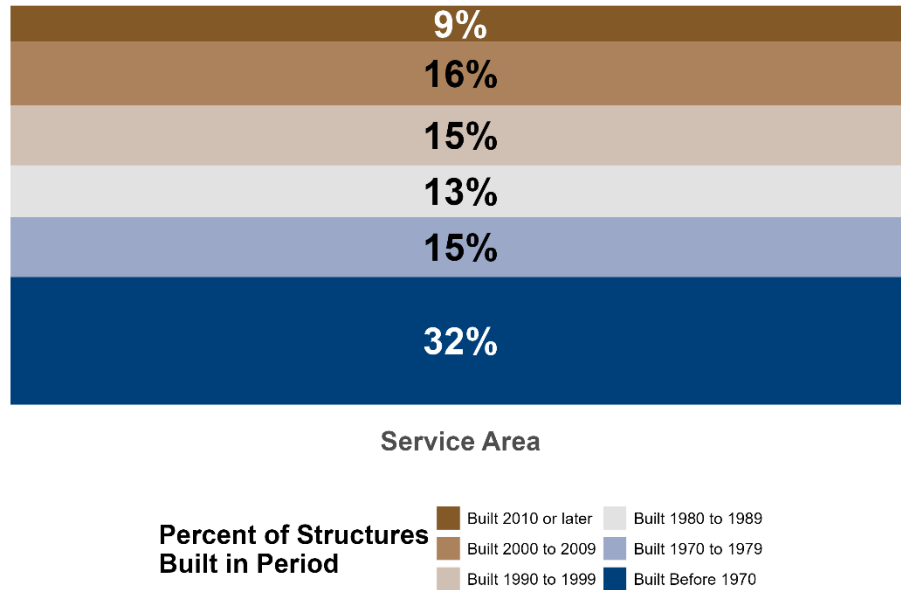


Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 63. Distribution of Housing Structure Types by County

Structures built before 1970 account for 32% of the housing stock, representing the single largest share of units in the service area. A substantial portion of housing units were constructed during the 1970s through 1990s; structures built during this period account for 43% of the housing stock in the service area. Construction in recent years, 2000 and later, represents the smallest share of total housing units. Homes built during 2000-2009 account for 16% of the stock, while structures built in 2010 or later make up

9%, a cumulative 25%. This percentage makes the service area’s housing stock slightly older than that of Georgia, wherein 39% of the housing stock was built before 1990, 21% from 2000 to 2009, and 12% for 2010 or later, a total of 33% after 2000.



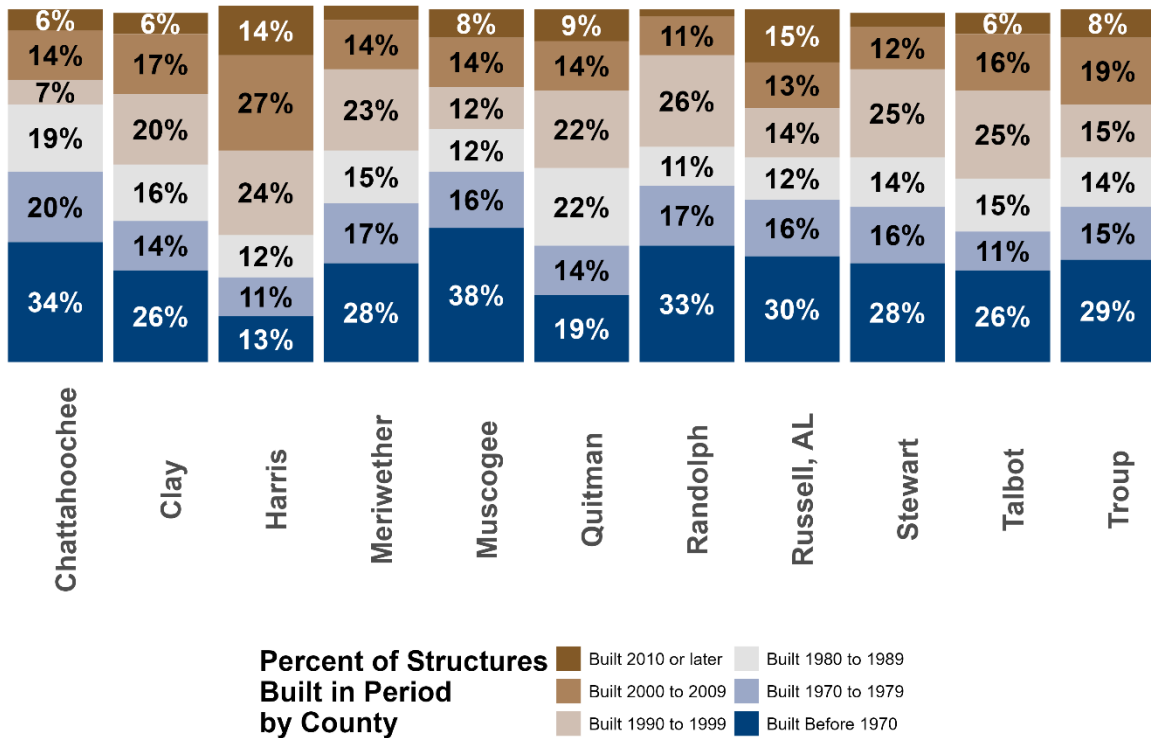
Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 64. Age of Housing Stock in the ESP Service Area

Across all counties, a substantial share of the housing stock predates 1990, with the structures constructed before 1970 alone ranging from 13% in Harris County to 38% in Muscogee County. Counties with the highest proportions of pre-1970 housing include Muscogee (38%), Chattahoochee (34%), and Randolph (33%), while Harris (13%) and Quitman (19%) have comparatively smaller shares of the oldest housing units.

Notably, only 2% of structures in Randolph County were built in 2010 or later, marking it as the county with the oldest housing stock in the service area. Conversely, Harris County has the largest share, 14%, of housing built in the most recent years, with over 41% of structures in this county constructed in the year 2000 or later.

Housing built between 1970 and 1999 accounts for a large and relatively consistent portion of housing units across most counties. Approximately half of all housing stock in each county was constructed from 1970 to 1999, with counties such as Quitman, Meriwether, and Stewart having 55% or more of their housing stock built during that time. Housing constructed between 1990 and 2009 also represents a notable share in most counties.



Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 65. Distribution of Age of Housing Stock by County

Overall, ESP’s service region has an aging housing stock. Structures that are more than 50 years old make up over 30% of the region’s housing stock, and while county-level variability exists, aging housing stock makes up a significant percentage of the housing options for most counties in the service area. At the same time, only two counties have more than 10% of their housing stock built since 2010. In addition, like much of the state of Georgia, the region is predominantly comprised of single-family homes. However, in some counties, mobile homes account for as much as a third of the housing stock. In combination, the age of housing stock and the high share of households experiencing cost burden signal that housing challenges are acute in the ESP region.

Food Insecurity

Food insecurity rates are relatively similar across much of the service area, with seven of the eleven counties in the service area reporting food insecurity rates between 15.0% and 19.9%. Randolph, Stewart, and Russell (AL) display the highest rates in the service area, each with food insecurity levels of 20% or higher. Harris County has the lowest share of food-insecure households, with a rate between 10% and 14.9%. Except for Harris County, all counties in the service area had a food insecurity rate higher than that of the state of Georgia, which had a rate of 14.9% in 2023, according to Feeding America.

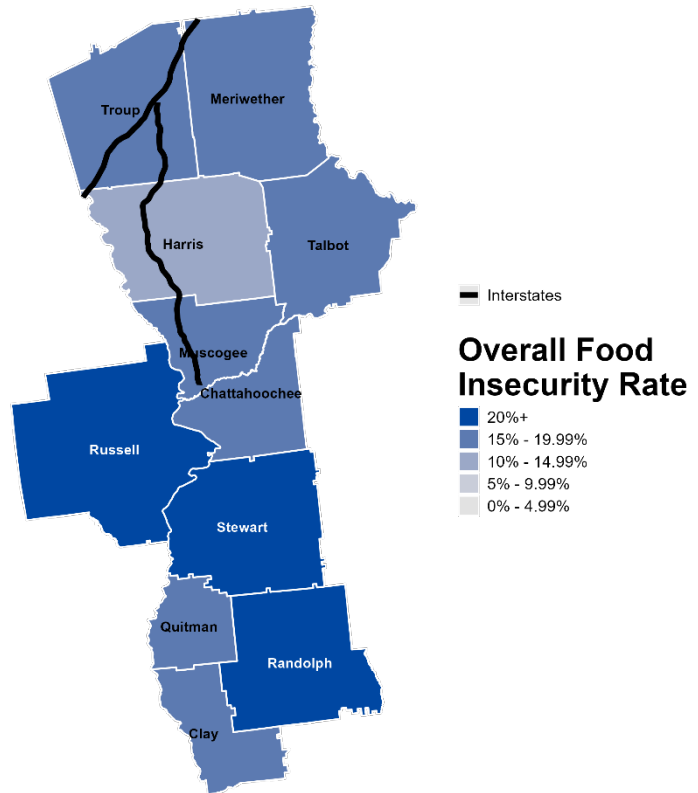
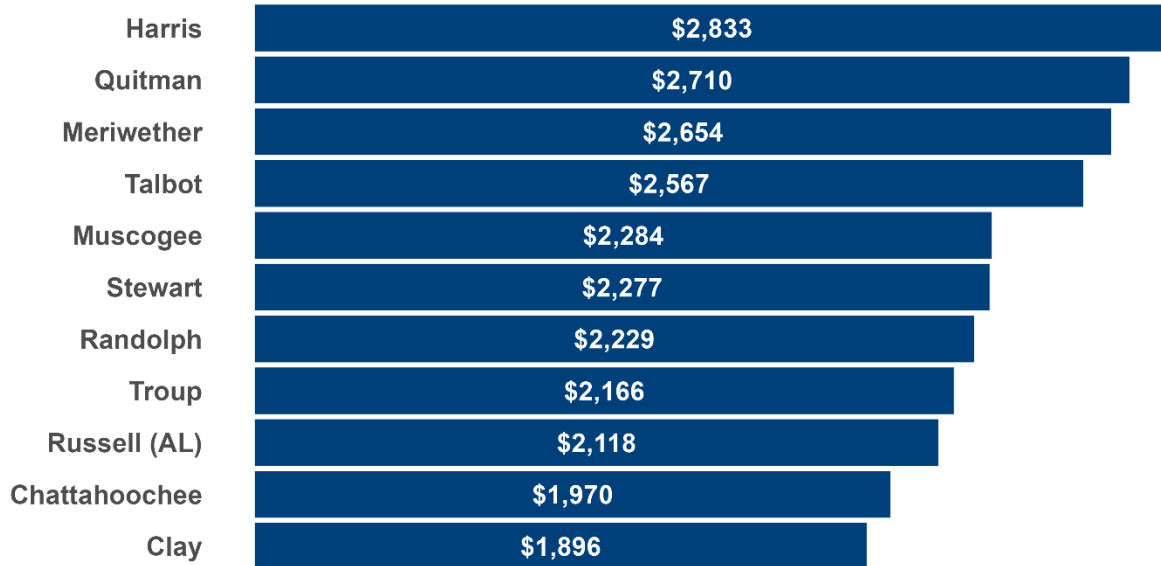


Figure 66. Service area Food Insecurity Rate

Source: Feeding America

Energy Costs

Figure 67 presents the average annual household energy costs across counties in the service area. Reported costs range from a low of \$1,896 in Clay County to a high of \$2,833 in Harris County, indicating substantial variation in typical household energy expenditures across the service area.

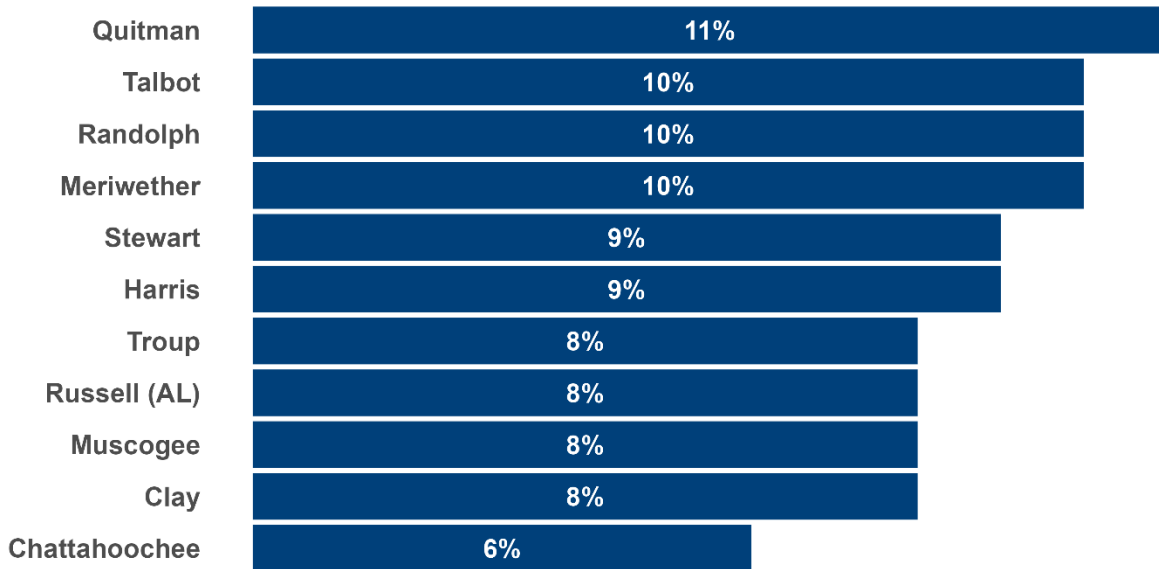


US Department of Energy, Low-Income Energy Affordability Data (Lead) Tool

Figure 67. Average Annual Household Energy Cost (\$), 2023

Energy Burden

Figure 68 displays average household energy burden by county, defined as the share of household income spent on home energy costs (US Department of Energy 2023). Higher percentages indicate a larger proportion of income devoted to energy expenses. Energy burden ranges from 6% in Chattahoochee County to 11% in Quitman County, with several counties clustered between 8% and 10%. These energy burden rates are substantially higher than those of the state of Georgia, which had an overall energy burden rate of 2% as of 2023, according to the Department of Energy.



US Department of Energy, Low-Income Energy Affordability Data (Lead) Tool

Figure 68. Energy Burden (as a percentage of annual household income), 2023

Qualitative Data Analysis

Stakeholder Perspectives

The secondary data review presented in Section I identifies persistent challenges related to economic stability, housing affordability, and access to basic needs across ESP's service area. To complement these findings, Enrichment Services Program (ESP), in partnership with the J.W. Fanning Institute for Leadership Development (Fanning), collected input from various stakeholders via an online survey. The purpose of this data collection was to gain a deeper understanding of individual perceptions and experiences.

Survey Respondents

ESP's survey received 105 complete responses. Survey participants were asked to identify their role(s) in the community and/or their relationship to Enrichment Services Program, Inc. (ESP), with the ability to select more than one option.

The largest share of respondents identified as ESP employees (58.65%), reflecting strong internal participation in the community assessment process. In addition, 20.19% reported that they have used or currently use ESP services, providing perspectives informed by lived experience.

Other participants represented a range of additional stakeholder groups, including ESP Board members (9.62%), individuals from the business, workforce, and economic development community (8.65%), service providers or partner organizations (7.69%), and those working in Pre-K-12 education (5.77%). A smaller number identified as government officials and/or elected leaders (1.92%), while a small share selected other roles (1.92%).

Overall, the survey response pool reflects a mix of internal stakeholders, service users, governance representatives, and community partners, with overlapping roles that provide multiple perspectives on ESP's services and impact.

Priority Issues Facing Individuals and Families with Low Income

Respondents identified the three most pressing issues facing individuals and families with low income in their communities as employment, housing, and bill payment. These selections point to persistent challenges related to economic stability and basic needs.

Table 5. Issues Faced by Low-Income Individuals and Families

Issues	Number of times selected (105 respondents)
Not enough jobs that pay people what they need	52
Not enough affordable housing	51
Paying bills	42
Finding childcare	27
Poor nutrition/lack of access to food	19
Paying for healthcare	19
Accessing mental health care	18
Lack of education (adults)	18
Drug use	11
Lack of safe housing	10
Accessing care for physical health	9
Lack of job training for available jobs	8
Education (children)	8

To grasp how staff perspectives aligned with broader findings, employee responses to this question were examined independently. Employees see jobs that pay a living wage, affordable housing, and paying household bills as the most pressing needs facing individuals and families with low income. While these priorities closely mirror those identified by the full respondent pool, employees placed slightly greater emphasis on employment and income adequacy. This discrepancy likely reflects staff members' more holistic and intimate understanding of the needs of the people they serve.

Local Resources

When asked how well local resources are currently meeting the needs of people with low income, over 45% of survey participants responded, “not very well.”

How well are local resources currently meeting the needs of people with low income?

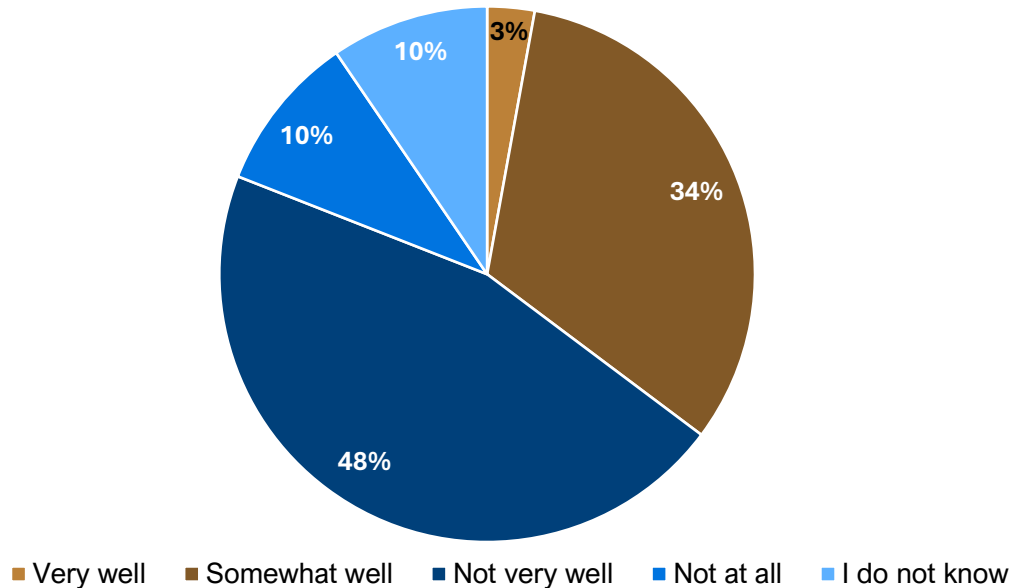


Figure 69. Sufficiency of Local Resources

ESP employees expressed a more critical assessment than the overall respondent group. Nearly 60% of employees reported that local resources are meeting needs “not very well” or “not at all,” while just over one-third determined that resources are meeting needs “somewhat well.” Again, this difference in perception is likely due to the in-depth relationship with the people that they serve.

Survey participants described the role they believe ESP should play in addressing the needs identified in their communities. Responses show evidence of a broad expectation that ESP serves as both a direct service provider and a connector to resources, with particular emphasis on early childhood education, utility assistance, and support for families experiencing financial instability.

Many identified high-quality early childhood education, including Head Start and Early Head Start, as a core and essential role for ESP. Various participants emphasized the need to expand access by increasing available seats, offering before- and after-care options, and ensuring that childcare remains affordable for working families. Utility assistance was also frequently cited, with stakeholders noting both the importance of this support and the high demand for services related to electric, gas, and water bills.

Beyond direct financial assistance, ESP's role was described as helping families achieve greater self-sufficiency and long-term stability. This included providing education and training opportunities such as job training, financial literacy, parenting and homeownership education, as well as supporting access to mental and physical health resources. Some individuals referenced the importance of outreach and communication, noting that ESP should continue to increase awareness of available services, particularly for individuals with limited access to technology.

Many stakeholders also highlighted the importance of partnerships and collaboration, describing ESP as a bridge between families and other community resources. Suggested roles for the organization included leveraging existing partnerships, developing new collaborations to expand available supports, and coordinating referrals when ESP is unable to meet a need directly. Some respondents noted that ESP's ability to fulfill these roles is closely tied to funding and staffing capacity, with calls for increased resources to meet rising demand.

In all, responses show that stakeholders view ESP as a central anchor organization. They understand that the organization provides critical direct services, facilitates access to broader community support, and plays a leadership role in addressing both immediate needs and the underlying conditions that contribute to poverty and instability.

While the items above reflect perspectives across all responses, the following section focuses specifically on the experiences of individuals who have directly utilized ESP services, providing insight into how community needs manifest at the household level.

Needs of ESP Customers

Of the 105 respondents, 21 indicated they have utilized ESP services. One resides in Harris County, one in Troup County, and the remaining 19 reside in Muscogee County.

These survey participants were asked to identify challenges they personally experienced in the past 12 months. Difficulty paying bills emerged as nearly universal, with food insecurity also reported in a substantial share of responses.

Table 6. Challenges Faced by ESP Residents

Challenges over the past 12 months	Number of times selected (21 respondents)
Paying the electric bill	17
Paying other bills	15
Worrying about having enough food for my family	10
Accessing mental health care	5
Finding affordable housing	4
Difficulty caring for older adults	3
Accessing care for physical health	3
Finding affordable childcare	3
Finding good childcare	2
Difficulty finding or keeping employment	1
Having after-school care for my children	1
I have not experienced any of these	0
Other	0

In describing the services they had received from ESP in the past year, respondents most frequently referenced utility and energy assistance, including help paying electricity, gas, and heating bills. Examples included “heating assistance,” “help with gas bill,” “Georgia Power,” and “utility assistance.” A smaller number mentioned receiving nutrition assistance, early childhood education, and material supports such as diapers and wipes.

Respondents most frequently cited financial stability and assistance with core household expenses, particularly utilities and housing, as needed to help their families right now. Many responses referenced help paying electric, water, rent, or mortgage bills, reinforcing earlier suggestions that bill payment remains an immediate concern for households.

Several individuals also identified affordable housing as a critical need, often paired with concerns about safety or long-term affordability. Others pointed to employment-related needs, including better-paying jobs, career assistance, and overall changes to their financial situation. Additional needs mentioned included affordable childcare, mental health support for children, transportation, and home repairs for seniors. A small

number used broader terms such as “financial” or “stability,” pointing to a desire for sustained improvements beyond short-term assistance.

The same group of respondents was asked to identify barriers they encounter when attempting to access assistance or services. Services that were not available when needed were cited most frequently. Other commonly reported barriers included cost, transportation, and lack of clarity about what services were available.

Collectively, these barriers point to both structural constraints (service availability and affordability) and informational or logistical challenges (transportation and service awareness). These constraints and challenges indicate opportunities for continued coordination, communication, and efforts to increase service accessibility.

Employee Perspectives

ESP employees identified what they perceive as the most significant needs among the individuals and families currently served by the organization. Responses reflected a strong and consistent emphasis on economic stability, with frequent references to affordable housing, utility assistance, employment, and sufficient income. Related needs such as transportation, food access, and childcare, particularly in rural areas and for working families, were also listed.

Alongside immediate financial needs, many employees identified education and training as critical for helping families move out of poverty. These responses included references to adult education, job training, life skills, and financial literacy, suggesting a recognition of both short-term crises and longer-term pathways to self-sufficiency. Some also noted mental health, substance use, and access to health care as ongoing challenges affecting families’ stability.

Overall, employee perceptions closely mirror the needs identified by ESP customers, particularly around housing, utilities, food, and income. This alignment provides confidence that the challenges faced by ESP clients are well understood by staff.

Head Start and Early Head Start were identified by staff as the programs that have the greatest impact on ESP’s mission. Energy and utility assistance programs, including LIHEAP, were also commonly identified, particularly for their role in stabilizing households during periods of financial hardship — needs that employees and service users alike identified as most pressing.

Other program areas noted for their impact included community services, education and workforce development, food assistance, and housing-related programs, including emerging or newer initiatives. Respondents emphasized that all program areas contribute meaningfully to ESP’s mission, particularly given the breadth and persistence of poverty-related challenges in the community.

ESP staff noted the importance of intentional relationship building and increased engagement across partner sectors, particularly in geographic areas with limited existing resources. Several staff noted that opportunities for collaboration in rural communities are rarer relative to more highly populated service areas.

Employees identified potential partnerships related to workforce development and employment, including job fairs, on-the-job training, and collaboration with employers and workforce agencies. Others highlighted opportunities to strengthen relationships with housing authorities, emergency relief organizations, and local government, particularly to address housing stability and basic needs. Partnerships with schools, libraries, health care providers, faith-based organizations, and civic groups were also noted as opportunities to better support families, especially those participating in Head Start and Early Head Start.

The value of increased visibility and communication was noted by employees. These activities included attending community events, networking opportunities, and inviting partners to visit ESP centers. Others mentioned the importance of internal capacity to support staff participation in partner meetings. The need for coordination strategies with partners, including shared goals or intake processes, was also identified.

In additional comments, staff noted the importance of relationship-based, community-centered approaches to addressing need. They highlighted the value of meeting families where they are, providing hands-on support, and engaging directly with community members to understand their experiences and priorities. Including individuals with lived experience in conversations about community needs was also particularly important to employees.

Partner Organizations

In response to survey questions designed for their stakeholder group, partner organizations reflected on their collaboration with ESP, the populations they serve, and service gaps observed across the broader community. Most partners reported a strong and consistent relationship (57.14%), while others described collaboration as occasional (28.57%) or limited (14.29%). Overall, it appears that ESP maintains generally positive working relationships with partner organizations, though the depth and consistency of collaboration vary.

Partner organizations reported serving a wide range of populations, with a particular focus on individuals and families with low incomes, people experiencing homelessness, and other vulnerable or underserved groups, including older adults, people with disabilities, and families with children. Several partners described their work as community-wide in scope, serving entire populations rather than specific subgroups. Partner organizations reported operating across multiple counties, with Muscogee County served by all, with additional service coverage across surrounding counties,

including Chattahoochee, Clay, Harris, Quitman, Randolph, Stewart, Talbot, Russell, and Troup.

When asked to identify services that are most in demand but least available locally for families and individuals with low income, partner organizations consistently highlighted transportation, affordable and safe housing, and employment opportunities that provide a livable wage. Transportation challenges were noted as particularly acute in rural areas, where limited options contribute to missed health care appointments and reduced access to services. Partners also identified emergency shelter, childcare, and comprehensive behavioral health services, including mental health and substance use treatment, as areas where local availability does not meet community demand.

Collectively, partner responses reinforce themes identified by service users and ESP employees, particularly around transportation barriers, housing instability, and employment challenges, and describe opportunities to deepen collaboration in addressing service gaps across ESP's multi-county service area.

Business, Workforce, and Economic Development Perspectives

Individuals who represented the business, workforce, and economic development sector identified the skills and job training programs most needed locally, as well as ways ESP and other organizations could better support workforce needs. Participant responses reflected a strong emphasis on aligning training with current labor market demand, while also recognizing shifts in how individuals, particularly younger workers, engage with employment.

Respondents frequently cite technical and trade-based training, including IT, electronics, robotics, HVAC, plumbing, construction, heavy equipment operation, CDL certification, and childcare, as the most needed skills or job training opportunities. Respondents also referenced the importance of soft skills, such as professionalism, work ethic, and customer service, as essential complements to technical training. Others highlighted the need for entrepreneurial skills, financial literacy, and tax education, noting that many individuals pursue gig or non-traditional work and would benefit from support in navigating income management and compliance.

Business sector representatives were also asked how ESP and other organizations could best support workforce needs. Common themes included expanding access to training aligned with available jobs, supporting unemployed adults in gaining relevant credentials, and collaborating with technical colleges, workforce boards, and local schools. Suggested strategies include hosting internships and apprenticeships to provide hands-on experience in high-demand fields and encouraging nontraditional career pathways for individuals who may not pursue common employment routes.

Several respondents emphasized the importance of addressing supportive needs, particularly childcare, as a prerequisite for workforce participation. Others highlighted

the value of stronger coordination among employers, service providers, and community organizations to meet workforce needs without placing undue strain on businesses.

Overall, responses from the business and workforce sector reinforce the need for integrated workforce development approaches that combine technical and soft skills training, accommodate non-traditional employment pathways, and address practical barriers such as childcare. These perspectives align with comments from other stakeholder groups that emphasize employment quality, training, and economic stability as central to addressing community needs.

Perspectives of Government Officials and Elected Leaders

Two individuals identified as government officials and/or elected leaders. One represents Muscogee County, and the other represents Stewart County, providing limited but geographically diverse perspectives within ESP's service area.

Elected officials rated their familiarity with ESP's programs and with the impact of ESP's efforts. Responses indicate mixed levels of familiarity.

Of the two elected officials who completed these questions, one reported being very familiar with ESP's programs, while the other reported not being very familiar. A similar pattern was observed regarding their familiarity with the impact of ESP's efforts, with one reporting high familiarity and the other reporting limited familiarity.

This variation may indicate an opportunity to strengthen ongoing communication and engagement with local officials, particularly to ensure a consistent understanding of ESP's role, services, and outcomes across jurisdictions.

Government officials were also asked how ESP could better align its services with city or county priorities. One survey participant suggested a stronger focus on engaging employers that offer livable wages, reinforcing the importance of workforce and economic development strategies, while the other noted that ESP's services are already aligned with local priorities.

Additional Community Input

Respondents were allowed to provide additional comments they believed would help ESP better understand community needs. While many chose not to offer additional input, those who did largely reinforced and deepened themes identified elsewhere in the survey, particularly related to utility assistance, childcare, transportation, communication, and education.

Select responses focused on access challenges related to utility assistance, including concerns about limited appointment availability, overloaded phone lines, and difficulty navigating application processes. These responses are in line with the idea that utility assistance is both highly needed and highly utilized in the ESP service area.

Others emphasized childcare and transportation as persistent barriers for families seeking employment or training opportunities. Childcare stipends expanded childcare capacity, and improved transportation options, particularly in underserved or geographically isolated areas, were highlighted as needs.

A number of respondents underscored the importance of education, financial literacy, and hands-on support, including budgeting, life skills, parenting education, and workforce readiness. They described the need to meet families “where they are” through community-based outreach, relationship-building, and direct engagement with families in their neighborhoods. Others noted the value of continued data collection and listening efforts, including surveys and direct feedback from staff and community members.

Finally, some individuals highlighted organizational capacity and communication, calling for increased funding, staffing, clearer advance communication about service availability, and stronger internal and external coordination. Several also recognized ESP’s value and impact in the community, expressing support for continued investment in the organization and its services.

Themes Across Perspectives

Across stakeholder groups, survey responses reveal a high degree of alignment around the primary challenges facing individuals and families with low income, particularly related to utility costs, housing affordability, food access, childcare, and employment stability. Service users, employees, partner organizations, business leaders, and elected officials consistently identified economic stability as both an immediate concern and a longer-term challenge. Utility assistance often serves as a first point of contact. Housing, childcare, transportation, and workforce development were cited repeatedly as barriers to sustained progress.

While the priority needs identified were largely consistent across stakeholder groups, perspectives varied somewhat in emphasis based on role and proximity to service delivery. Service users most often described immediate financial pressures, particularly difficulty paying utility bills and affording basic household expenses. These concerns were echoed by employees. Staff were more likely, however, to identify employment needs and low wages as root causes that need to be addressed. These differences reflect differences in vantage points rather than disagreement.

At the same time, participants highlighted the importance of coordination, communication, and partnerships in addressing these needs. While ESP is widely viewed as a trusted and impactful provider, particularly in early childhood education, energy assistance, and community services, survey results also point to opportunities to strengthen visibility, accessibility, and cross-sector collaboration. Collectively, these perspectives provide a comprehensive, community-informed understanding of both

urgent needs and the structural factors shaping household stability across ESP's service area.

Key Findings

1. Economic Stability, Particularly Utility and Housing Costs, Is the Most Pressing Community Need

Across all stakeholder groups, economic stability emerged as the dominant concern, with utility costs, housing affordability, and bill payment cited most frequently as urgent challenges. Service users reported difficulty paying electric and other household bills at especially high rates, and utility assistance was the most commonly referenced service received from ESP. Partner organizations, employees, business leaders, and elected officials similarly identified housing costs, utilities, and low-wage employment as central barriers facing individuals and families with low income.

2. Utility Assistance Serves as a Critical Entry Point but Does Not Fully Resolve Financial Instability

Survey responses show that utility assistance is both highly accessed and persistently needed. Service users' continued identification of bill payment as their greatest challenge suggests that while ESP's utility and energy assistance programs provide essential short-term stabilization, many households experience ongoing financial strain. This pattern underscores the importance of utility support while also highlighting the broader economic conditions that contribute to repeated need.

3. Childcare and Transportation Are Key Enablers of Employment and Self-Sufficiency

Childcare and transportation were consistently identified as barriers that limit families' ability to work, pursue education or training, and maintain stability. Service users, employees, partner organizations, and business-sector stakeholders all emphasized the role of affordable childcare and reliable transportation in supporting workforce participation - particularly for working families, single parents, and residents of rural areas.

4. Workforce Development Needs Extend Beyond Job Availability to Skills, Training, and Supportive Services

Stakeholders identified strong demand for job training aligned with local labor market needs, including technical and trade-based skills, soft skills, and opportunities for non-traditional or entrepreneurial work. Business and workforce representatives described the importance of internships, apprenticeships, and partnerships with educational institutions, while also noting that childcare and other supports are often prerequisites for successful workforce participation.

5. ESP Is Widely Viewed as a Trusted Anchor Organization with Strong Programmatic Impact

Across stakeholder groups, ESP was consistently described as a central and trusted provider of early childhood education, energy assistance, and community services. Employees and partners noted the impact of Head Start, Early Head Start, and utility assistance programs in promoting household stability. Many respondents expressed confidence in ESP's stewardship of resources and its role as a connector between families and community supports.

6. Awareness, Access, and Communication Affect the Reach and Effectiveness of Services

Despite strong perceptions of ESP's value, there remains variation in awareness, particularly related to service availability, application processes, and knowledge of existing programs and partnerships. Service users cited challenges related to appointment availability and communication, while elected officials reported mixed familiarity with ESP's programs and impact. These findings point to opportunities to strengthen communication, outreach, and coordination across jurisdictions and stakeholder groups.

7. Collaboration Is Valued and Viewed as Essential to Addressing Complex Community Needs

Stakeholders across sectors pointed to the importance of strong partnerships and coordination to address interconnected needs related to housing, employment, health, and family stability. Employees and partners identified opportunities to deepen collaboration, particularly in rural areas, through shared goals, clearer referral pathways, and increased engagement with employers, housing providers, health care organizations, and community-based institutions.

Appendix

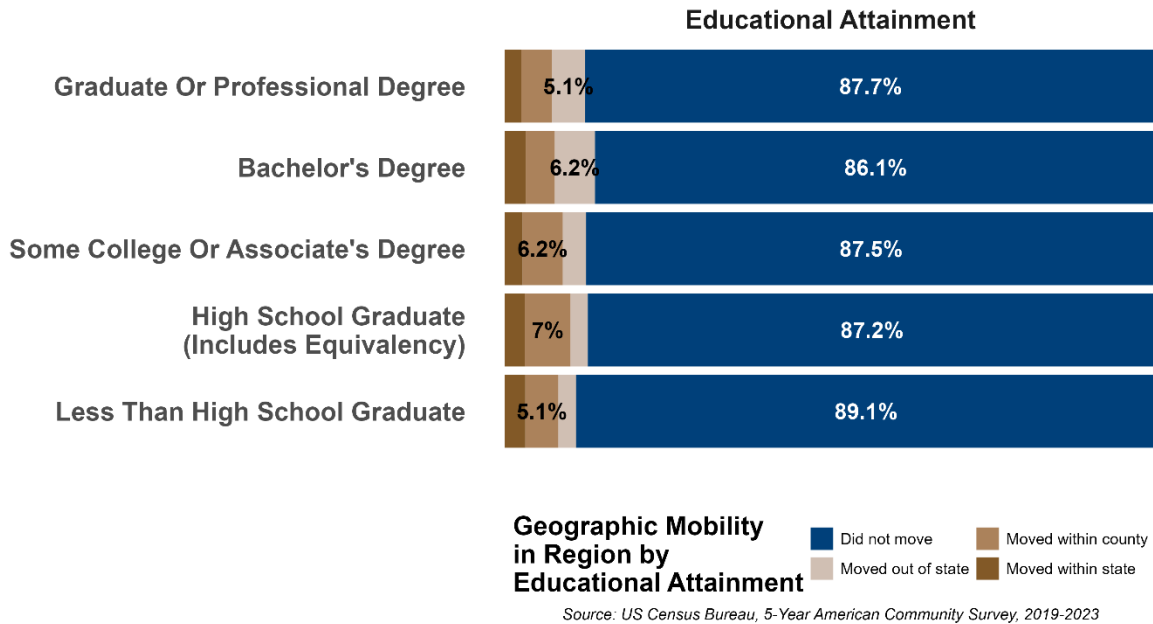


Figure 70: Geographic Mobility by Educational Attainment

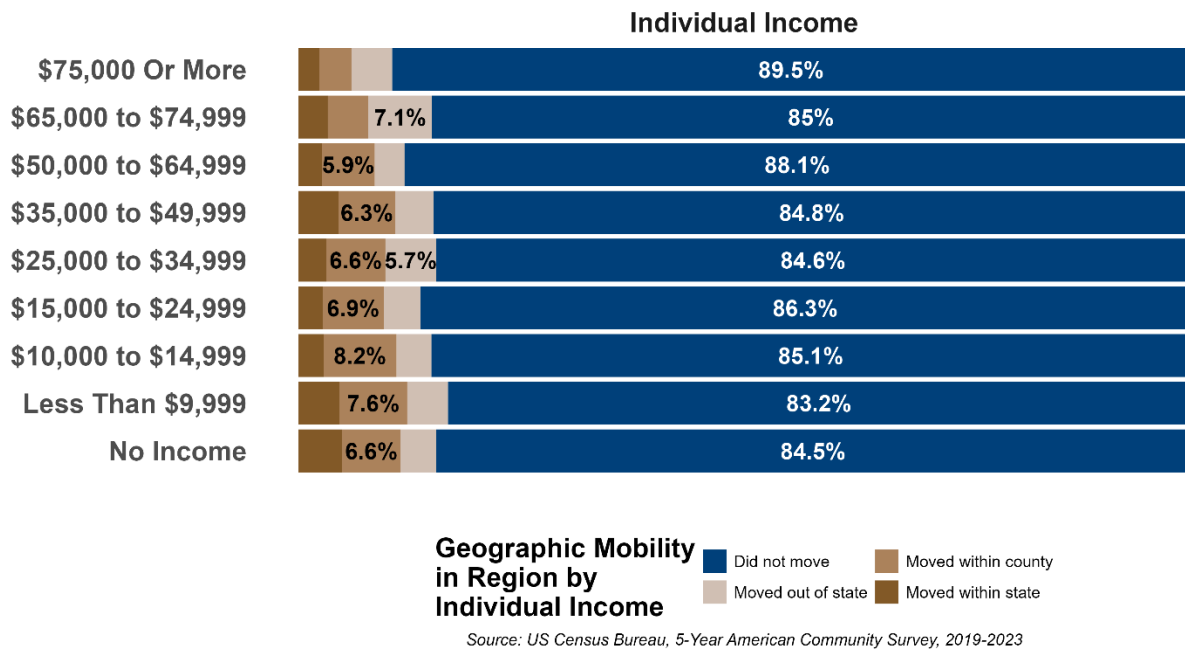
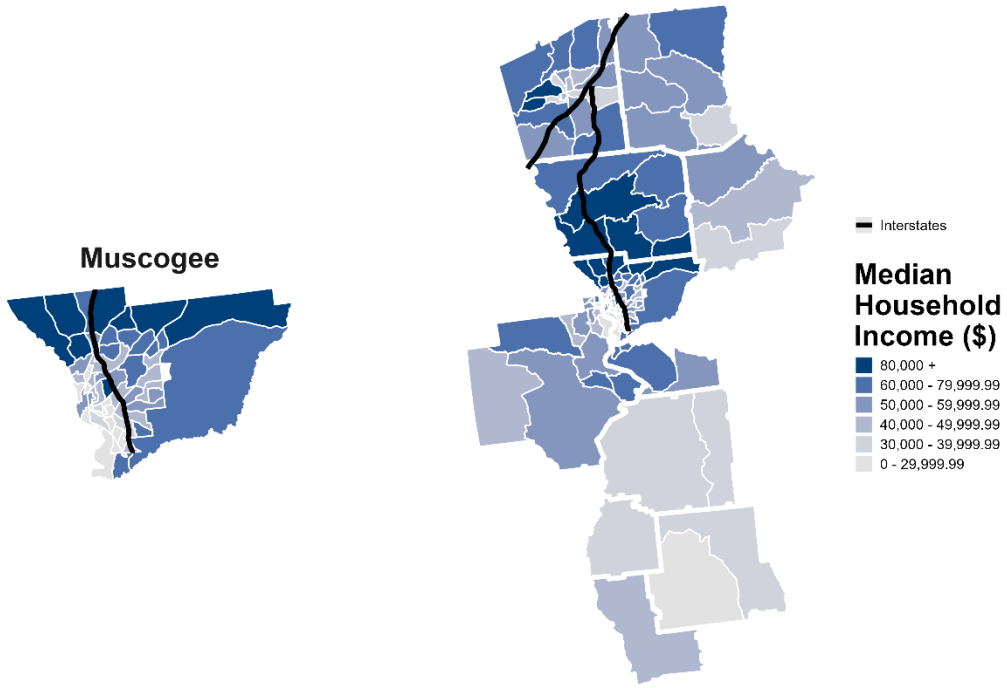
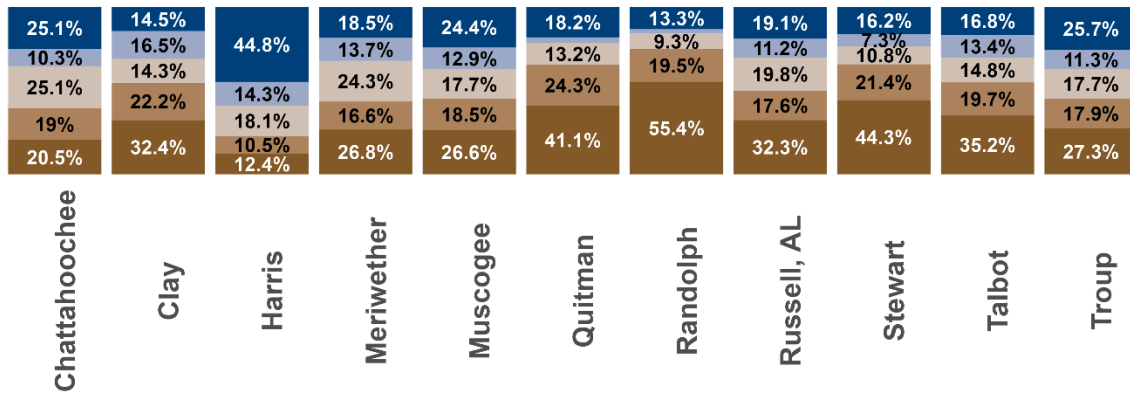


Figure 71. Geographic Mobility by Individual Income



Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 72. Median Household Income by Tract

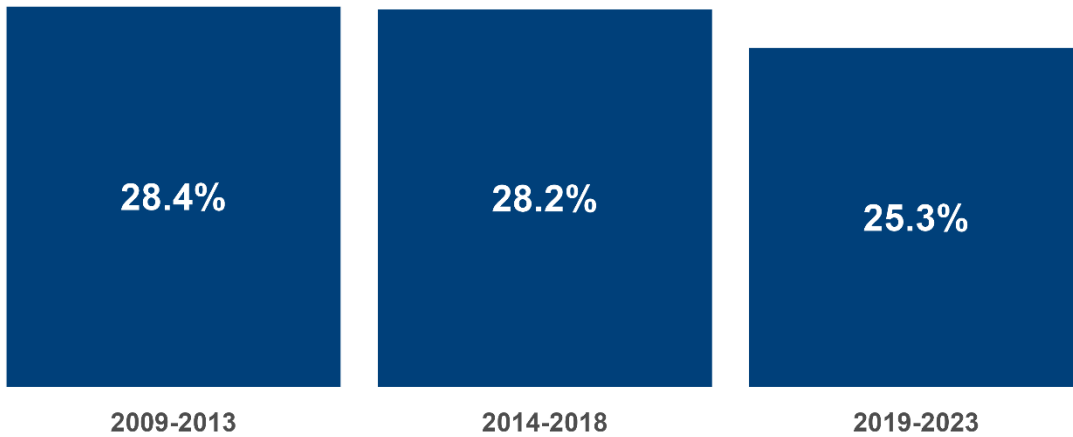


Percent of Households Making Annual Household Income by County

- \$100,000+
- \$75,000 - \$99,999
- \$50,000 - \$74,999
- \$30,000 - \$49,999
- Less than \$30,000

Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

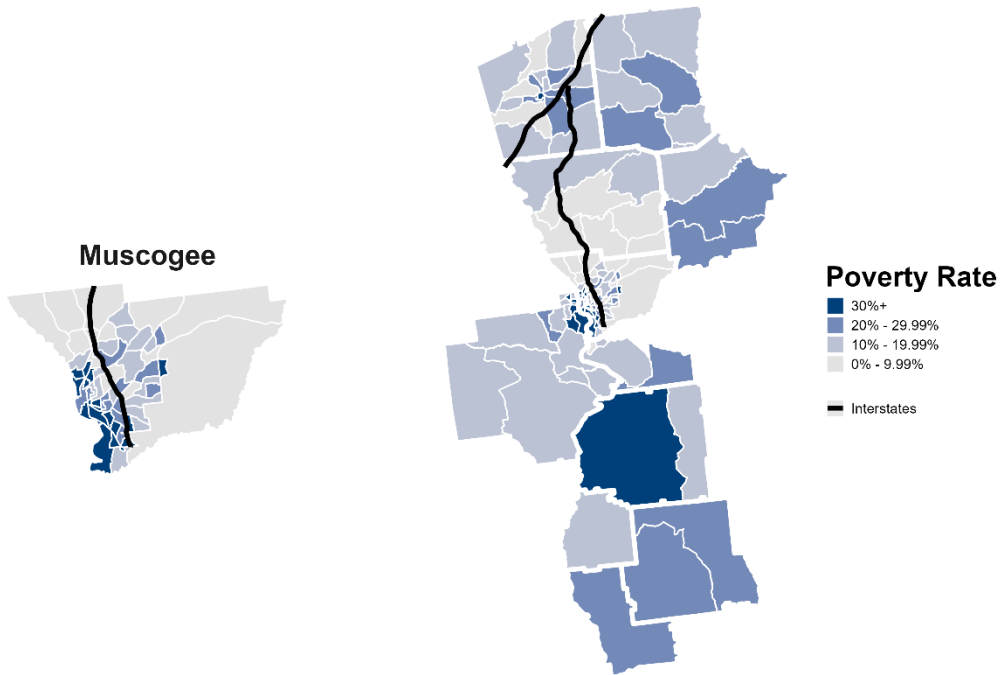
Figure 73. Median Household Income Distribution by County



Poverty Rate Over Time (Under 18)

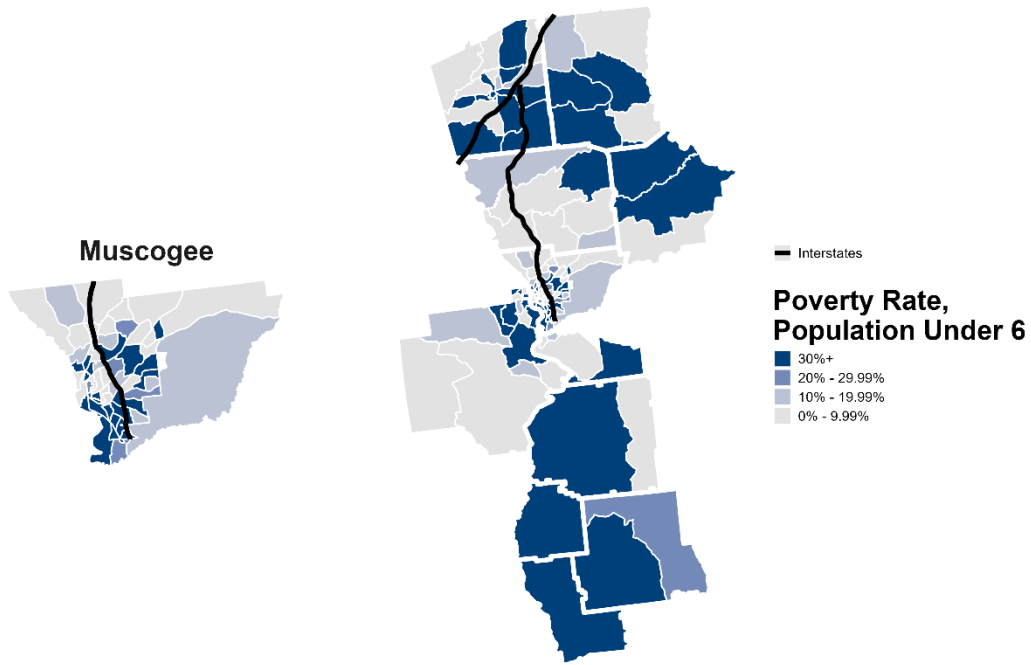
Source: US Census Bureau, 5-Year American Community Survey, 2019-2023, 2014-2018, and 2009-2013

Figure 74. Youth Poverty Rate Over Time



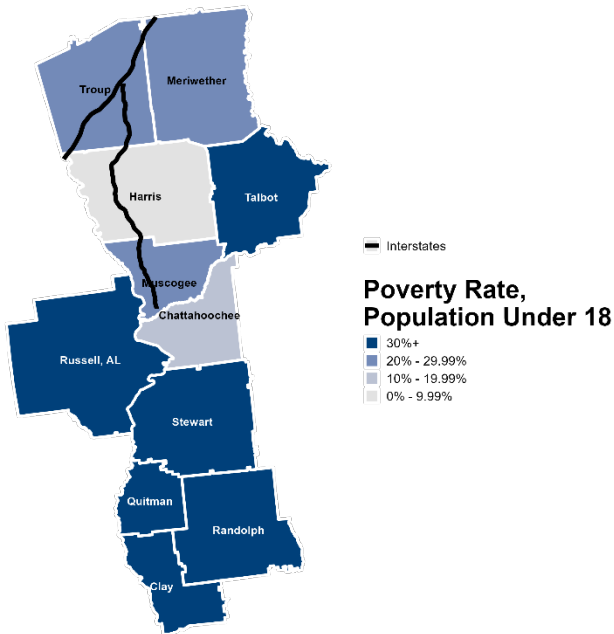
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 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 75. Poverty Rate by Tract



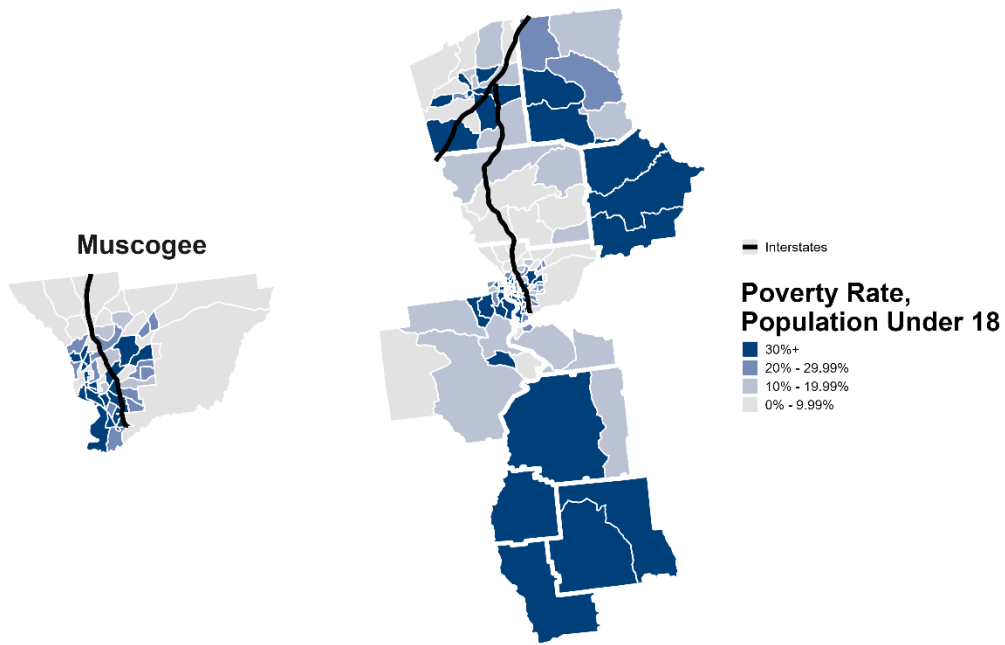
Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 76. Child Poverty Rate by Tract



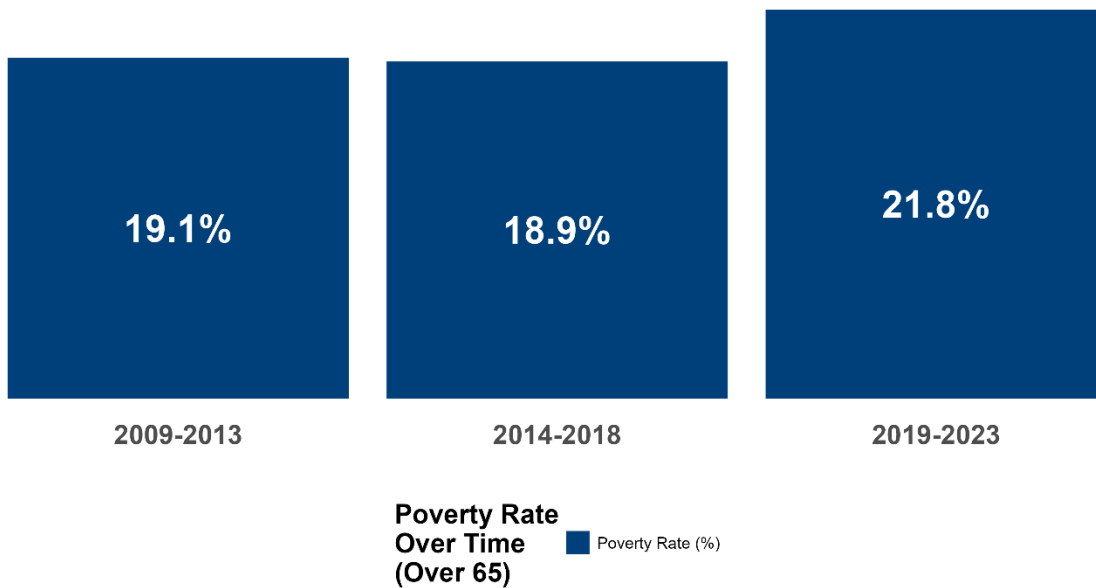
Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 77. Youth Poverty Rate by County



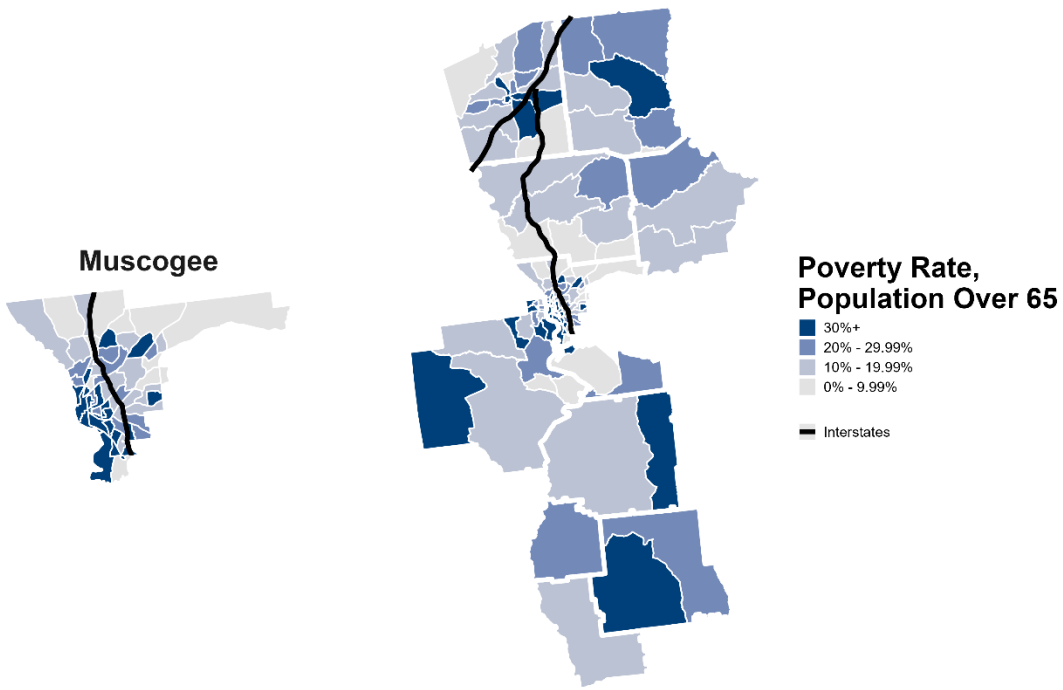
Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 78. Youth Poverty Rate by Tract



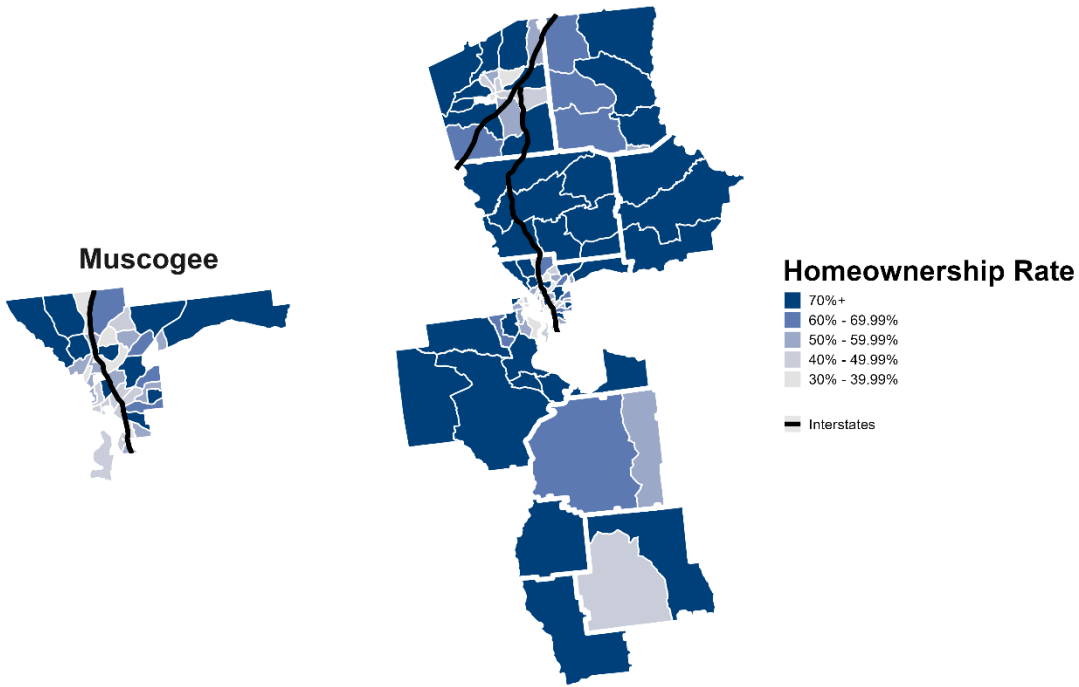
Source: US Census Bureau, 5-Year American Community Survey, 2019-2023, 2014-2018, and 2009-2013

Figure 79. Senior Poverty Rate Over Time



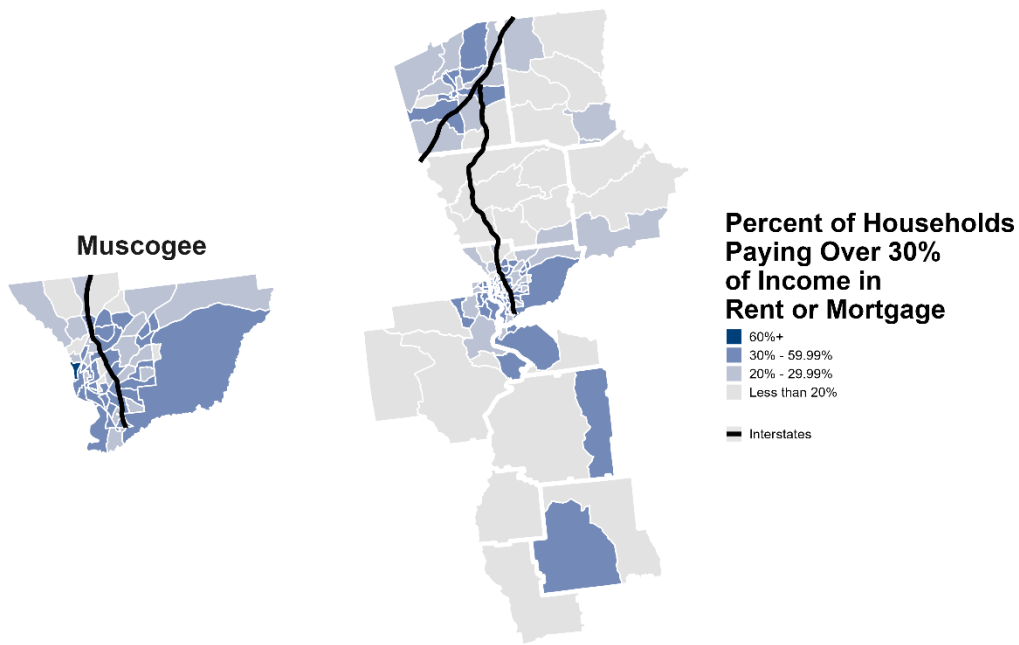
Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 80. Senior Poverty Rate by Tract



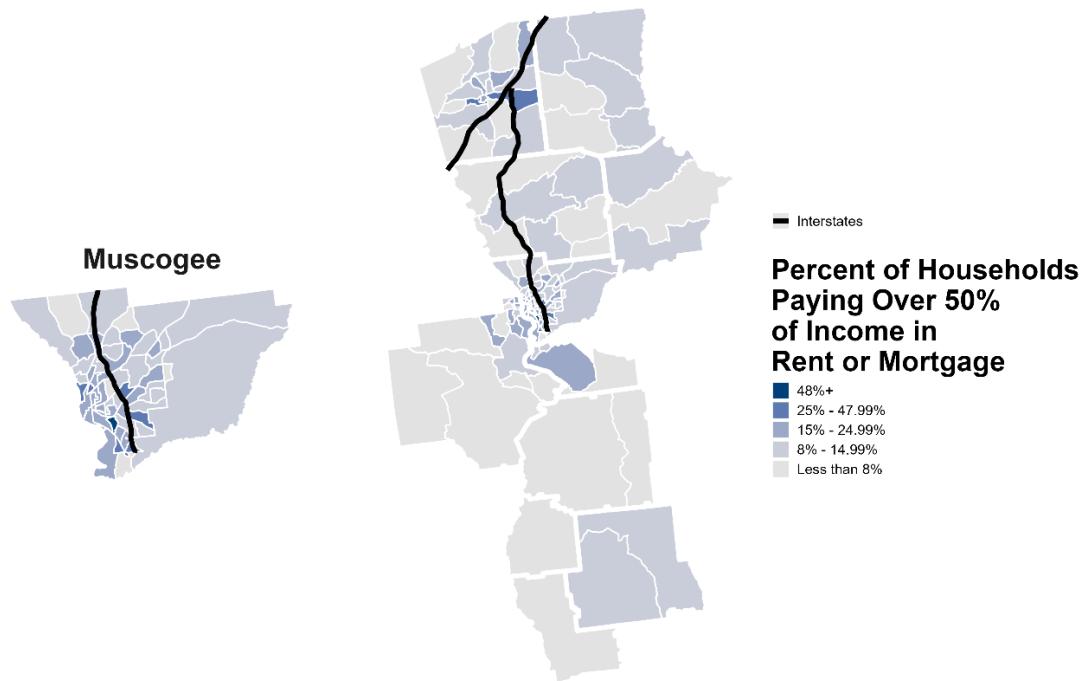
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Figure 81. Homeownership Rate by Tract



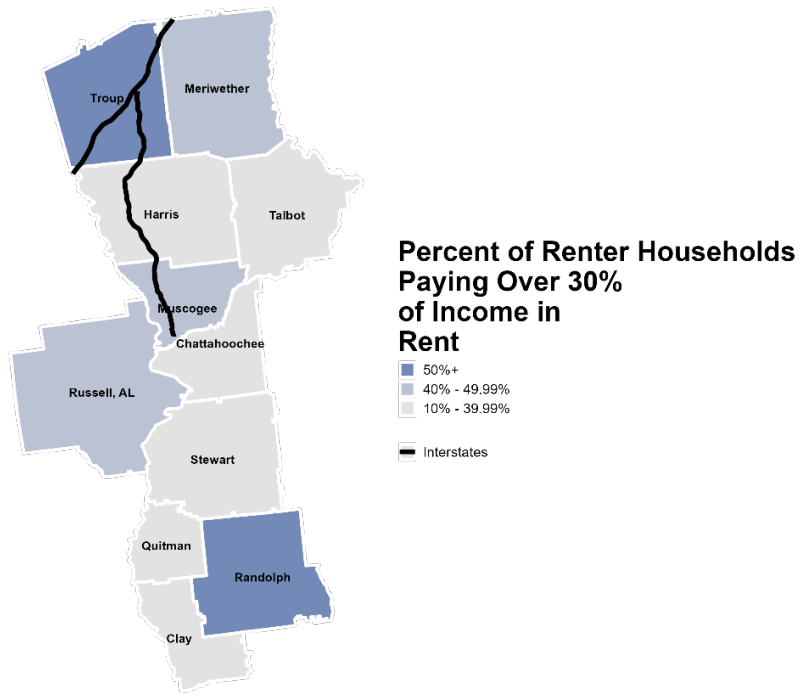
Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 82. Percent of Households Paying over 30% of Income in Rent or Mortgage by Tract



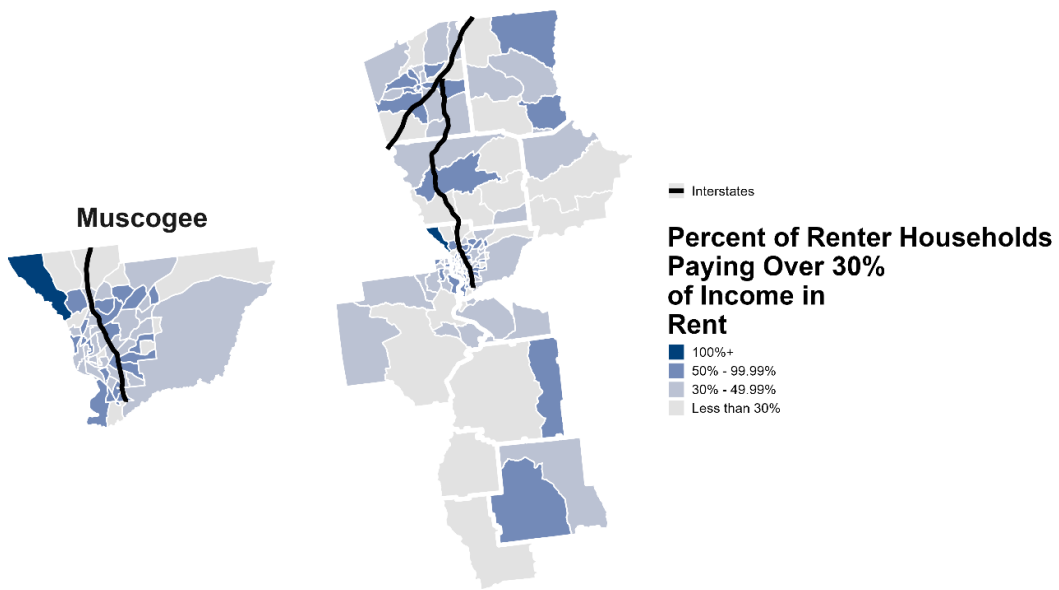
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 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 83. Percent of Households Paying over 50% Income in Rent or Mortgage by Tract



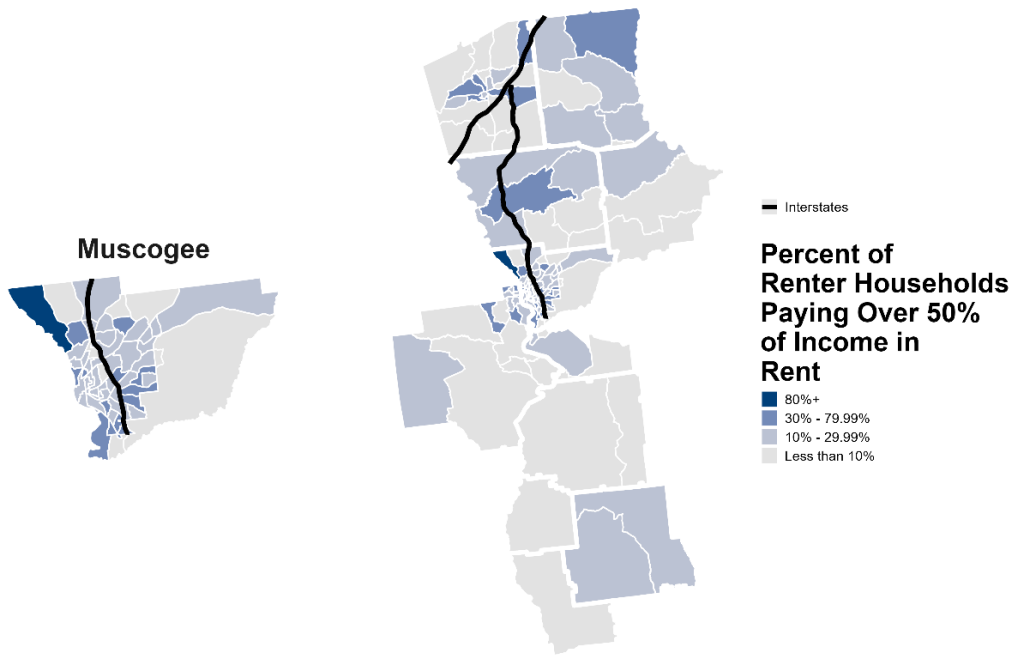
Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 84. Percent Renter Households Paying over 30% of Income in Rent by County



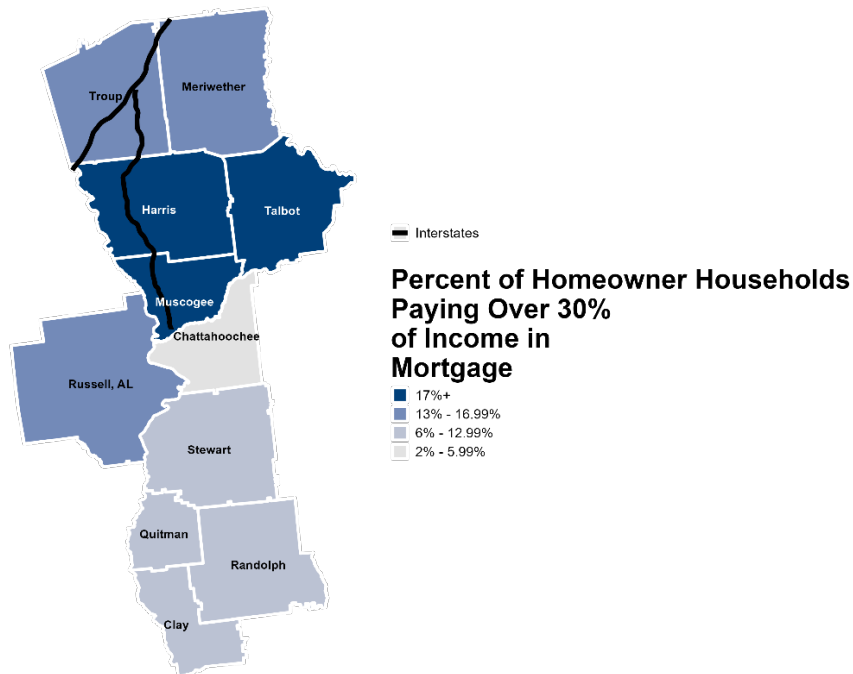
Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 85. Percent Households Paying Over 30% of Income in Rent by Tract



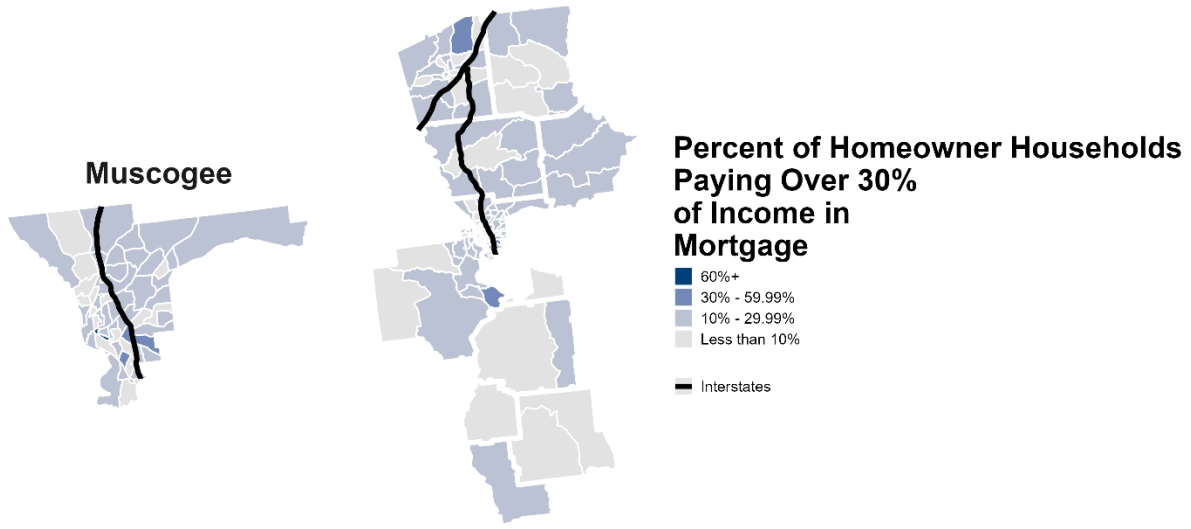
Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 86. Percent Households Paying over 50% of Income in Rent by Tract



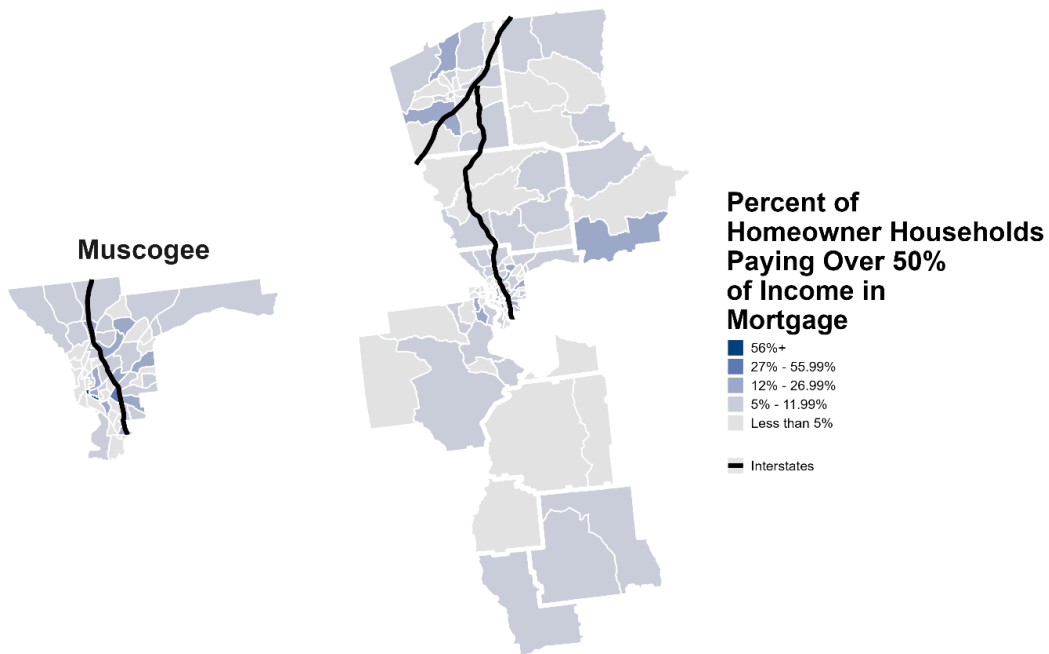
Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 87. Percent of Households Paying over 30% of Income in Mortgage by County



Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 88. Percent of Households Paying over 30% of Income in Mortgage by Tract



Missing Tracts Have No Data For This Variable
 Source: US Census Bureau, 5-Year American Community Survey, 2019-2023

Figure 89. Percent of Households Paying over 50% of Income in Mortgage by Tract

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https://www.energy.gov/sites/default/files/2024-07/lead-tool-factsheet_072624.pdf