

# Tallahassee-Leon County Office of ECONOMIC VITALITY

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## DATA DIGEST JULY 2016

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**Population:**

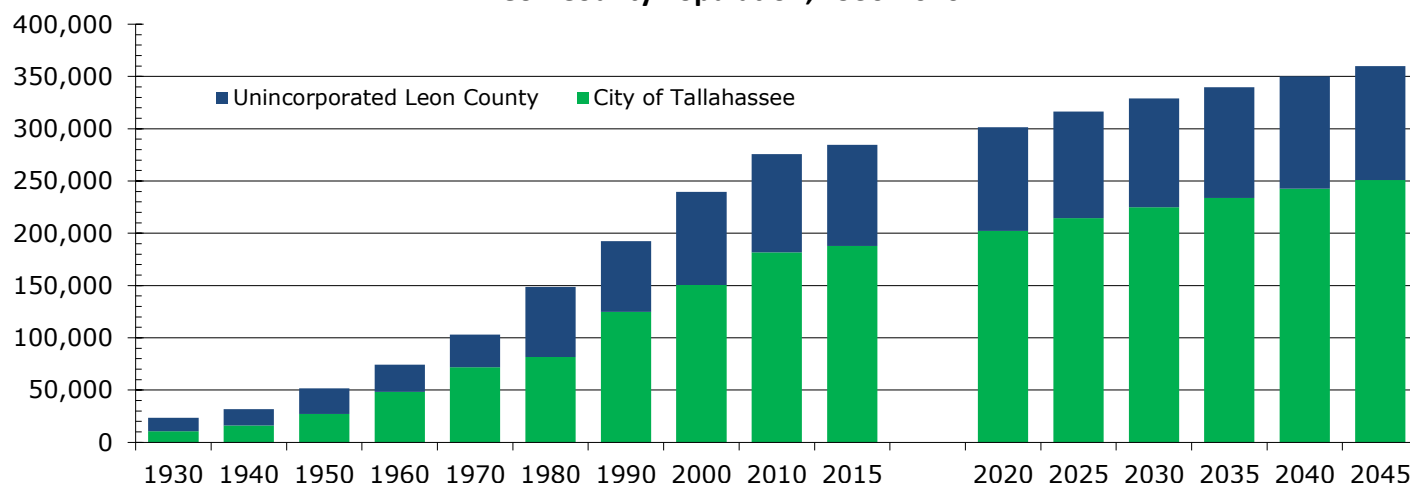
**Estimates and Projections**

Trend: Leon County's population increased by 36,035 residents between the 2000 and 2010 Census. More than 85% of the population growth in Leon County between 2000 and 2010 occurred within the City of Tallahassee while 15% of the growth was in Unincorporated Leon County. In comparison, between 1990 and 2000, 45% of the population growth occurred in Unincorporated Leon County.

Year	City of Tallahassee	Unincorporated Leon County	Leon County
1930	10,700	12,776	23,476
1940	16,240	15,406	31,646
1950	27,237	24,353	51,590
1960	48,174	26,051	74,225
1970	71,897	31,150	103,047
1980	81,548	67,107	148,655
1990	124,773	67,720	192,493
2000	150,624	88,828	239,452
2010	181,736	94,111	275,847
<b>2015</b>	<b>187,996</b>	<b>96,447</b>	<b>284,443</b>
2020	202,200	99,300	301,500
2025	214,600	101,900	316,500
2030	224,900	104,000	328,900
2035	233,900	105,800	339,700
2040	242,600	107,600	350,200
2045	250,800	109,200	360,000

Sources: University of Florida, Bureau of Economic and Business Research (2020-2040 Leon County projections); Tallahassee-Leon County Planning Department (City of Tallahassee and Unincorporated Leon County 2020-2040) projections assuming continued annexations and share of population growth captured by the City between 2000 and 2015 will continue throughout the projected time horizon).

**Leon County Population, 1930-2040**



## Demographics

### Population:

#### Growth by Census Tracts

Trend: By estimated population change by census tract since Census 2010, CT 26.05 (inclusive of Southwood), CT 5 (multi-family units) and CT 24.17 (inclusive of Bull Run) are estimated to have added the most residents since Census 2010.

Census Tract	Total Population 2010 Census	Total Population 2014 Estimate	Estimated Total Population Change, 2010-2014	Census Tract	Total Population 2010 Census	Total Population 2014 Estimate	Estimated Total Population Change, 2010-2014
2	3,737	3,755	18	21.03	3,418	3,418	0
3.01	1,546	1,544	-2	21.04	7,310	7,711	401
3.02	2,334	2,343	9	22.01	5,016	5,338	322
3.03	3,628	3,648	20	22.05	5,642	5,784	142
4	2,393	2,404	11	22.06	3,168	3,168	0
5	2,433	3,067	634	22.07	2,242	2,247	5
6	3,858	3,836	-22	22.08	4,771	4,779	8
7	2,004	2,006	2	23.02	3,342	3,413	71
8	2,973	2,981	8	23.03	3,930	4,024	94
9.01	7,989	7,988	-1	23.04	2,898	2,965	67
9.03	2,144	2,142	-2	24.03	2,676	2,694	18
9.04	3,313	3,313	0	24.08	7,745	7,823	78
9.05	2,593	2,593	0	24.10	6,018	6,048	30
10.01	2,692	2,653	-39	24.11	1,609	1,645	36
10.02	2,188	2,188	0	24.12	9,050	9,184	134
11.01	2,896	2,882	-14	24.13	2,464	2,598	134
11.02	2,503	2,550	47	24.14	4,273	4,275	2
12	1,314	1,324	10	24.15	4,323	4,327	4
13	6,552	6,552	0	24.16	2,774	2,878	104
14.01	2,932	2,609	-323	24.17	7,207	7,793	586
14.02	4,791	4,761	-30	25.05	5,641	5,784	143
15	4,475	4,477	2	25.07	2,538	2,600	62
16.01	4,577	4,607	30	25.08	9,064	9,367	303
16.02	3,091	3,098	7	25.09	3,653	3,663	10
17	7,270	7,330	60	25.10	7,397	7,494	97





## Demographics

### Population:

#### Growth by Census Tracts

Trend: By estimated population change by census tract since Census 2010, CT 26.05 (inclusive of Southwood), CT 5 (multi-family units) and CT 24.17 (inclusive of Bull Run) are estimated to have added the most residents since Census 2010.

Census Tract	Total Population 2010 Census	Total Population 2014 Estimate	Estimated Total Population Change, 2010-2014	Census Tract	Total Population 2010 Census	Total Population 2014 Estimate	Estimated Total Population Change, 2010-2014
18.01	3,966	4,104	138	25.11	1,292	1,302	10
18.02	5,207	5,277	70	25.12	3,346	3,596	250
19.01	3,035	3,033	-2	25.13	3,598	3,688	90
19.02	4,062	4,102	40	26.03	4,991	5,121	130
20.03	2,298	2,300	2	26.04	3,108	3,207	99
20.04	7,383	7,383	0	26.05	4,218	5,258	1,040
20.05	3,326	3,589	263	26.06	3,232	3,280	48
20.06	3,472	3,540	68	27.01	4,978	5,097	119
21.01	4,675	4,680	5	27.02	4,905	5,064	159

Sources: U.S. Department of Commerce, Bureau of the Census, Census 2010; University of Florida, Bureau of Economic and Business Research, 2014 Leon County Estimates; Tallahassee-Leon County Planning Department, Census Tract Estimates



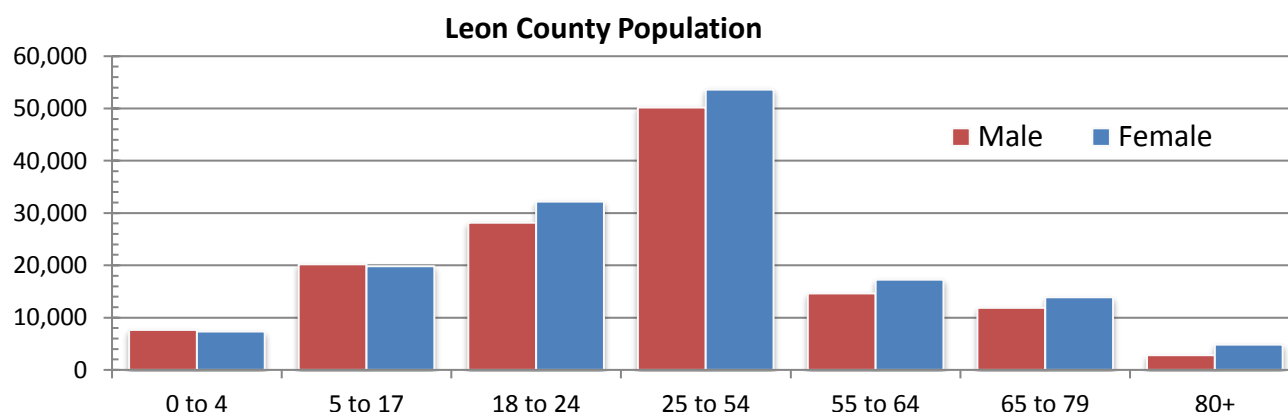
## Demographics

### Population:

### Age and Sex

Trend: Leon County has the second highest percentage of population between the ages of 18 and 24 in the state at 21.6% (behind Alachua County) and the second smallest percentage aged 65 and older at 11.4% (behind Union County) in the State of Florida.

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	14,939	5.3%	7,320	2.6%	7,619	2.7%
5 to 17	40,032	14.1%	19,847	7.0%	20,185	7.1%
18 to 24	60,364	21.2%	32,205	11.3%	28,159	9.9%
25 to 54	103,845	36.5%	53,632	18.9%	50,213	17.7%
55 to 64	31,841	11.2%	17,232	6.1%	14,609	5.1%
65 to 79	25,775	9.1%	13,918	4.9%	11,857	4.2%
80+	7,647	2.7%	4,836	1.7%	2,811	1.0%
<b>Total</b>	<b>284,443</b>	<b>100.0%</b>	<b>148,990</b>	<b>52.4%</b>	<b>135,453</b>	<b>47.6%</b>



Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 175", June 2016



## Demographics

### Population:

### Race and Ethnicity

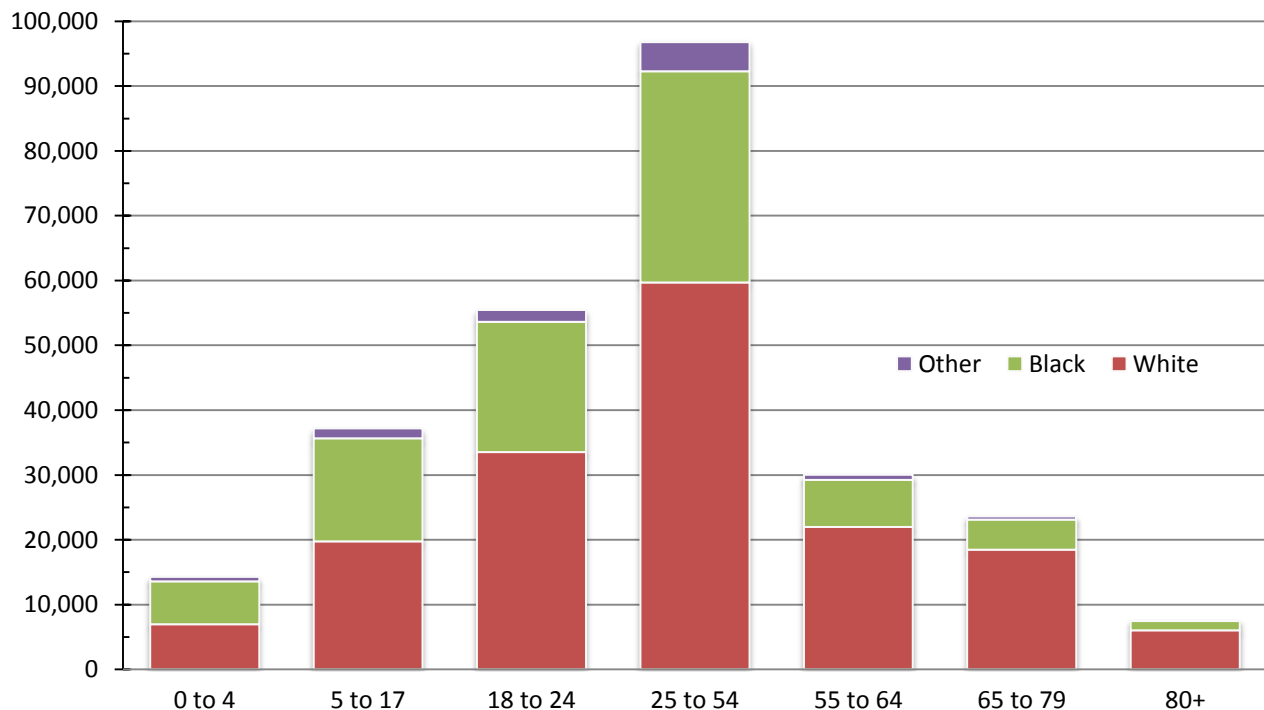
Trend: By race and ethnicity, Leon County's population includes 59.2% White, 31.5% Black, and 3.5% Other Races. Also, 5.8% of Leon County residents are of Hispanic origin.

Age Group	All Races	White	Black	Other	Hispanic Origin*
0 to 4	15,357	6,989	6,603	698	1,067
5 to 17	39,862	19,773	15,862	1,566	2,661
18 to 24	60,631	33,524	20,108	1,799	5,200
25 to 54	102,555	59,704	32,557	4,534	5,760
55 to 64	30,950	21,959	7,283	794	914
65 to 79	24,208	18,469	4,650	490	599
80+	7,729	6,049	1,432	84	164
<b>Total</b>	<b>281,292</b>	<b>166,467</b>	<b>88,495</b>	<b>9,965</b>	<b>16,365</b>

\*"Hispanic" is an ethnic classification rather than a racial category; people can be identified both by Hispanic origin and race.

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 172", June 2015

Age Group by Race



## Demographics

### Population:

### Race and Ethnicity Percentage

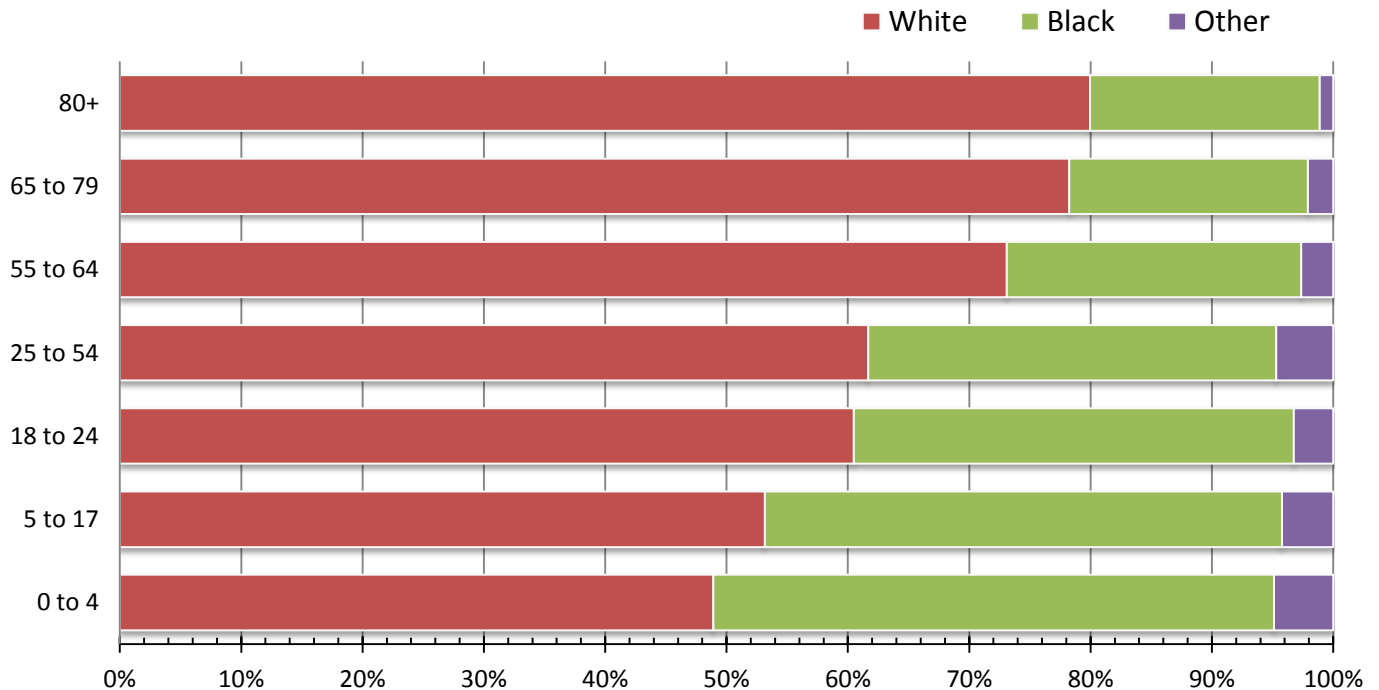
Trend: By race and ethnicity, Leon County's population includes 59.2% White, 31.5% Black, and 3.5% Other Races. Also, 5.8% of Leon County residents are of Hispanic origin.

Age Group	White	Black	Other	Hispanic Origin*
0 to 4	45.5%	43.0%	4.5%	6.9%
5 to 17	49.6%	39.8%	3.9%	6.7%
18 to 24	55.3%	33.2%	3.0%	8.6%
25 to 54	58.2%	31.7%	4.4%	5.6%
55 to 64	70.9%	23.5%	2.6%	3.0%
65 to 79	76.3%	19.2%	2.0%	2.5%
80+	78.3%	18.5%	1.1%	2.1%
<b>Total</b>	<b>59.2%</b>	<b>31.5%</b>	<b>3.5%</b>	<b>5.8%</b>

\*"Hispanic" is an ethnic classification rather than a racial category; people can be identified both by Hispanic origin and race.

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 172", June 2015

Age Group by Race





## Demographics

### Population:

### Components of Change

Trend: The components of population change in Leon County in the last decade (2000-2010) changed considerably in comparison with the 1990-2000 time period. The percentage of Leon County's population growth associated with net migration dropped from 67.1% in 2000 to 56.1% in 2010. It is estimated that since the 2010 Census, 74.1% of Leon County's population growth is attributable to net natural increase (total births less total deaths).

	<b>Leon County</b>	<b>State of Florida</b>
Total Population Change (2010-2015)	8,956	1,013,851
Net Natural Increase	6,638	189,543
Births	15,244	1,075,809
Deaths	8,606	886,266
Net Migration	2,318	824,308
Percent due to Natural Increase	74.1%	18.7%
Percent due to Net Migration	25.9%	81.3%

Source: University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2015

## Demographics

### Population:

### Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was 378,560 in 2015, up 3.0% from 2010.

Metropolitan Area/County(ies)	2015 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2000-2010
All Metropolitan Areas	19,106,299	17,689,986	15,023,351	17.7%
Miami-Fort Lauderdale-West Palm Beach (Broward, Miami-Dade, Palm Beach)	5,859,718	5,564,657	5,007,988	11.1%
Tampa-St. Petersburg-Clearwater (Hernando, Hillsborough, Pasco, Pinellas)	2,934,941	2,783,243	2,396,013	16.2%
Orlando-Kissimmee-Sanford (Lake, Orange, Osceola, Seminole)	2,320,195	2,134,411	1,644,563	29.8%
Jacksonville (Baker, Clay, Duval, Nassau, St. Johns)	1,423,970	1,345,596	1,122,750	19.8%
North Port-Sarasota-Bradenton (Manatee, Sarasota)	741,424	702,281	589,963	19.0%
Cape Coral-Fort Myers (Lee)	665,845	618,754	440,888	40.3%
Lakeland-Winter Haven (Polk)	633,052	602,095	483,924	24.4%
Deltona-Daytona Beach-Ormond Beach (Volusia, Flagler)	611,847	590,289	493,175	19.7%
Palm Bay-Melbourne-Titusville (Brevard)	561,714	543,376	476,230	14.1%
Pensacola-Ferry Pass-Brent (Escambia, Santa Rosa)	469,869	448,991	412,153	8.9%
Port St. Lucie (Martin, St. Lucie)	437,811	424,107	319,426	32.8%
<b>Tallahassee</b> <b>(Gadsden, Jefferson, Leon, Wakulla)</b>	<b>378,560</b>	<b>367,413</b>	<b>320,304</b>	<b>14.7%</b>
Ocala (Marion)	341,205	331,298	258,916	28.0%
Naples-Immokalee-Marco Island (Collier)	343,802	321,520	251,377	27.9%
Gainesville (Alachua, Gilchrist)	271,732	264,275	232,392	13.7%
Crestview-Fort Walton Beach-Destin (Okaloosa, Walton)	252,585	235,865	211,099	11.7%
Panama City (Bay)	189,656	184,715	162,777	13.5%
Punta Gorda	167,141	159,978	141,627	13.0%

## Demographics

### Population:

### Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was 378,560 in 2015, up 3.0% from 2010.

Metropolitan Area/County(ies)	2015 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2000-2010
<i>(Charlotte)</i>				
Homosassa Springs	141,501	141,236	118,085	19.6%
<i>(Citrus)</i>				
Sebastian-Vero Beach	143,326	138,028	112,947	22.2%
<i>(Indian River)</i>				
The Villages	115,657	93,420	53,345	75.1%
<i>(Sumter)</i>				
Sebring	100,748	98,786	87,366	13.1%
<i>(Highlands)</i>				

Sources: Executive Office of the President, U.S. Office of Management and Budget MSA definitions (OMB Bulletin No. 13.01); U.S. Department of Commerce, Bureau of the Census; University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2015

## Demographics

### Population:

### Household Characteristics

Trend: The average household size increased slightly in Leon County, from 2.34 persons per household in 2000 to 2.35 persons per household in 2010. In Leon County, the percentage of family households is higher in the unincorporated areas while the percentage of non-family households and one-person households is highest in the City of Tallahassee.

### Number of Households and Average Household Size

	Estimate April 1, 2015		Census April 1, 2010		Census April 1, 2000	
	Households	Average Household Size	Households	Average Household Size	Households	Average Household Size
Leon County	114,600	2.35	110,945	2.35	96,521	2.34
Florida	7,785,434	2.49	7,420,802	2.48	6,338,075	2.46

### Households by Type

	Families	Living Alone	Other Non-Families
Leon County	55%	30%	15%
City of Tallahassee	46%	34%	20%
Unincorporated Area	73%	22%	5%
Florida	65%	27%	8%

Sources: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 173", December 2015; U.S. Department of Commerce, Bureau of the Census, Census 2010





## Demographics

### Population:

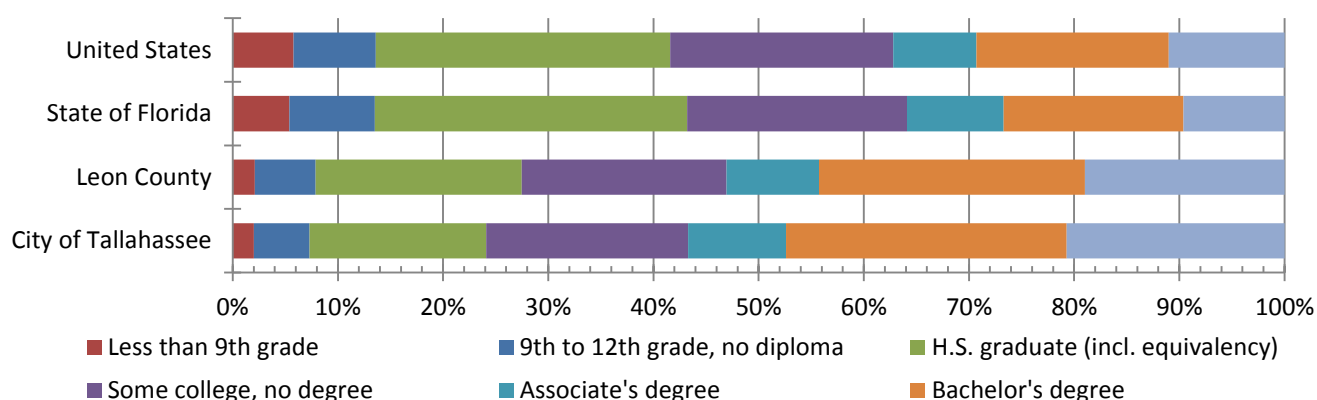
### Educational Attainment

Trend: The level of educational attainment has steadily increased in Leon County. As of 2014, 44.3% of Leon County residents 25 years and over had obtained a Bachelor's degree or higher, up from 41.7% in 2000. In comparison, 26.7% of State of Florida residents and 29.3% of US residents 25 years and over had obtained a Bachelor's degree or higher. Over 47% of Tallahassee residents had a bachelor's degree or higher.

Educational Attainment Level as of 2014*	City of Tallahassee	Leon County	State of Florida	United States
Less than 9th grade	2.0%	2.1%	5.4%	5.8%
9th to 12th grade, no diploma	5.3%	5.8%	8.1%	7.8%
H.S. graduate (incl. equivalency)	16.8%	19.6%	29.7%	28.0%
Some college, no degree	19.2%	19.5%	20.9%	21.2%
Associate's degree	9.3%	8.8%	9.2%	7.9%
Bachelor's degree	26.7%	25.3%	17.1%	18.3%
Graduate or professional degree	20.7%	19.0%	9.6%	11.0%

\* Population 25 years and older.

**Educational Attainment, 2014**



Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2010-2014

### Educational Attainment in Leon County, Population 25 years and over

	2000	Percent 2000	2010	Percent 2010
Less than 9th grade	4,218	3.1%	3,762	2.4%
9th to 12th grade, no diploma	10,749	7.8%	10,802	7.0%
H.S. graduate (incl. equivalency)	25,963	18.9%	32,696	21.2%
Some college, no degree	27,956	20.3%	30,869	20.0%
Associate's degree	11,255	8.2%	12,393	8.0%
Bachelor's degree	33,040	24.0%	36,930	24.0%
Graduate or professional degree	24,356	17.7%	26,697	17.3%
Total	137,537		154,149	

Source: U.S. Department of Commerce, Bureau of the Census, 2000, American Community Survey, 2006-2010

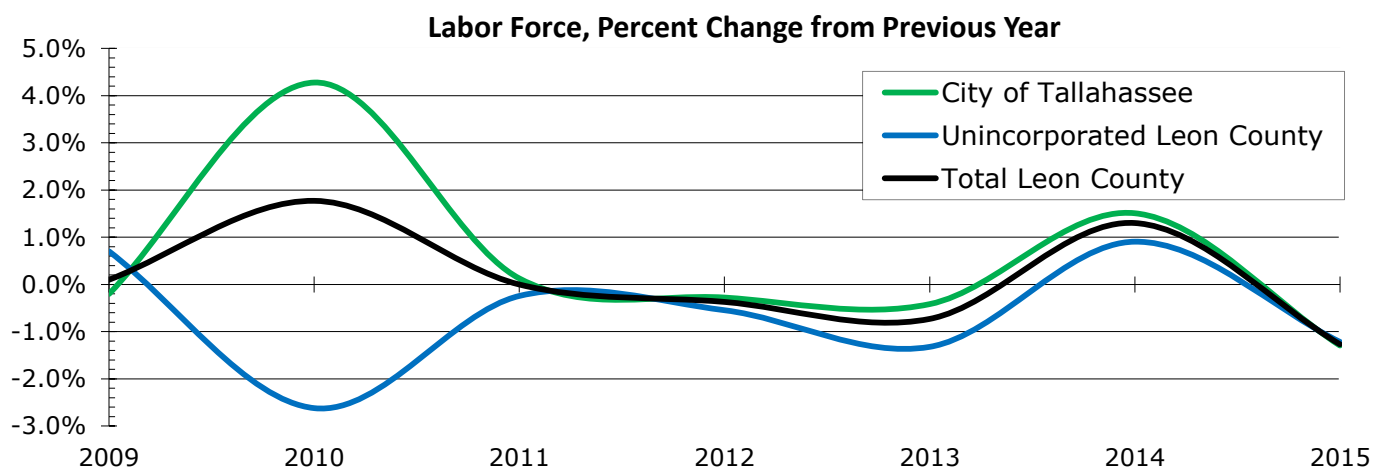
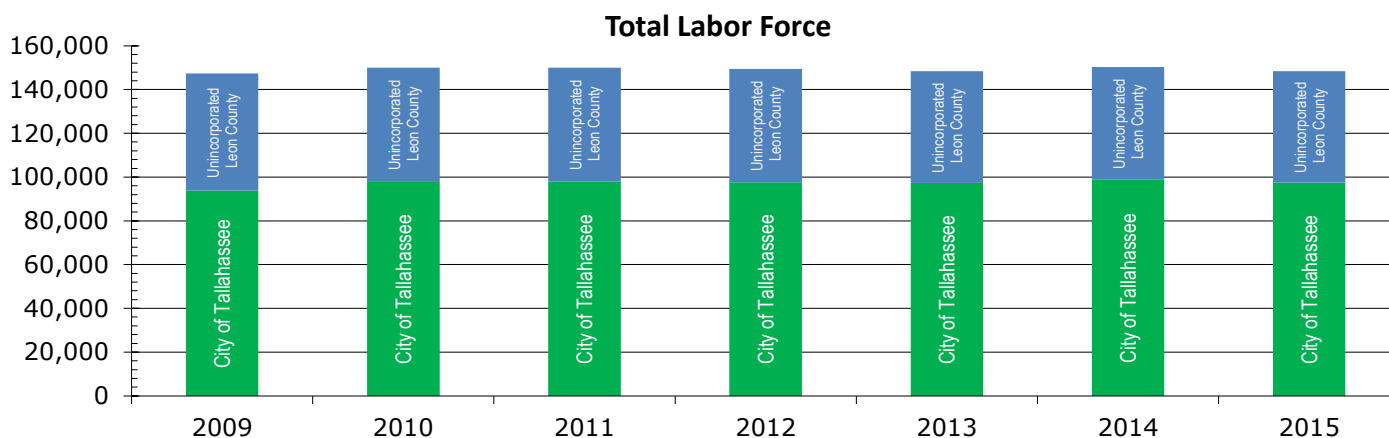
**Labor Force**

Trend: Leon County's labor force and number of employed residents both declined slightly in 2015 after increasing in 2014.

Year	City of Tallahassee		Unincorporated Leon County		Total Leon County	
	Labor Force	Change from Previous Year	Labor Force	Change from Previous Year	Labor Force	Change from Previous Year
2009	93,822	-0.2%	53,541	0.7%	147,363	0.1%
2010	97,834	4.3%	52,138	-2.6%	149,972	1.8%
2011	97,958	0.1%	52,011	-0.2%	149,969	0.0%
2012	97,686	-0.3%	51,727	-0.5%	149,413	-0.4%
2013	97,279	-0.4%	51,043	-1.3%	148,322	-0.7%
2014	98,746	1.5%	51,505	0.9%	150,251	1.3%
2015	97,468	-1.3%	50,878	-1.2%	148,346	-1.3%

*Note: Local Area Unemployment Statistics are a count of people employed by place of residence (not place of employment).*

*Source: Florida Dept. of Economic Opportunity, Labor Market Information, Local Area Unemployment Statistics*



## Workforce and Income

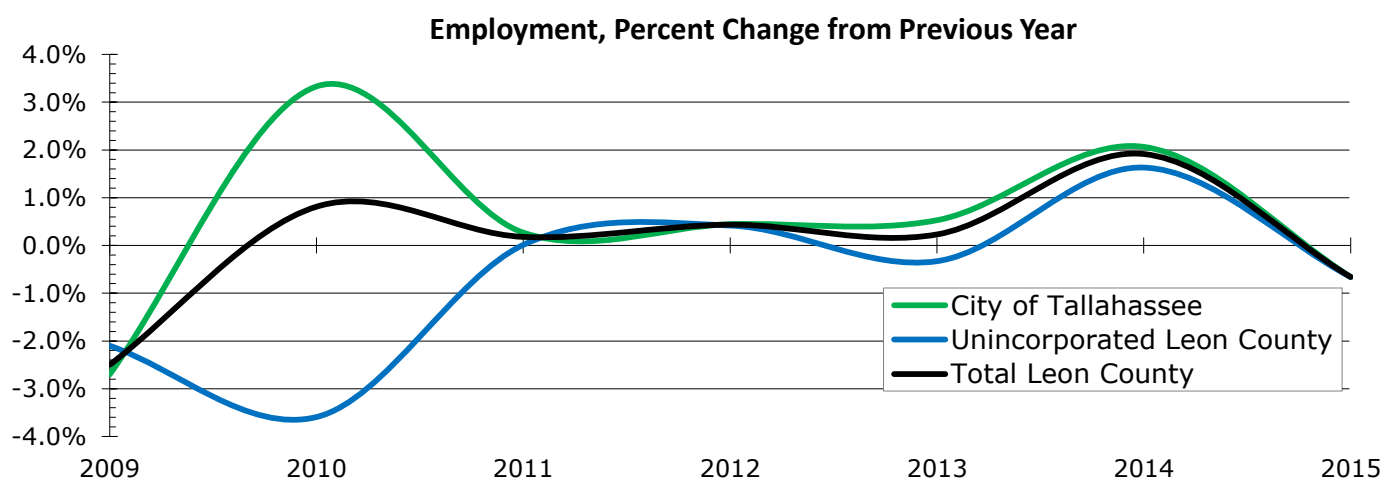
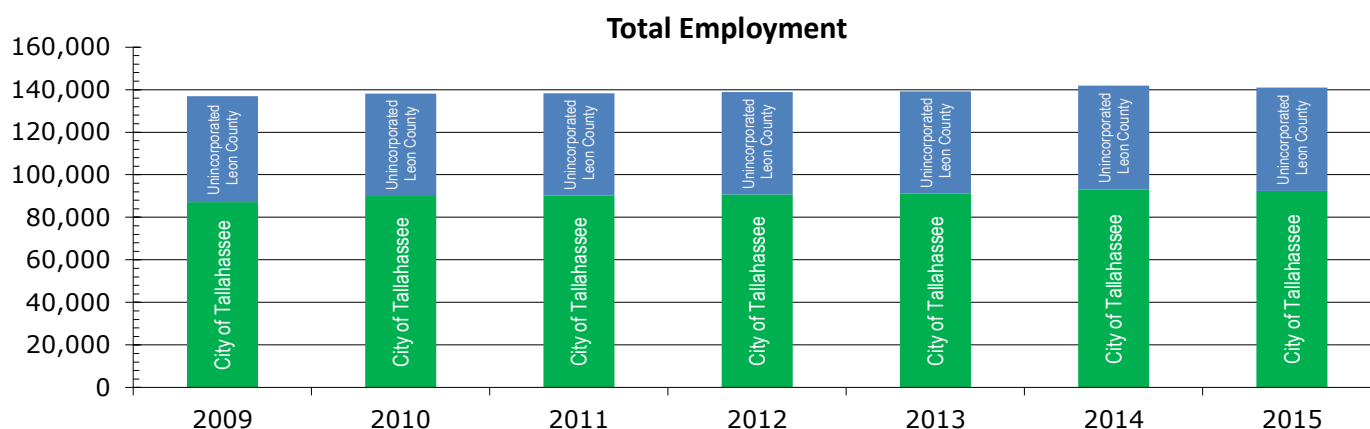
### Employment

Trend: Leon County's labor force and number of employed residents both declined slightly in 2015 after increasing in 2014.

Year	City of Tallahassee		Unincorporated Leon County		Total Leon County	
	Employment	Change from Previous Year	Employment	Change from Previous Year	Employment	Change from Previous Year
2009	87,147	-2.7%	49,815	-2.1%	136,962	-2.5%
2010	90,049	3.3%	48,025	-3.6%	138,074	0.8%
2011	90,290	0.3%	48,031	0.0%	138,321	0.2%
2012	90,692	0.4%	48,231	0.4%	138,923	0.4%
2013	91,171	0.5%	48,072	-0.3%	139,243	0.2%
2014	93,053	2.1%	48,856	1.6%	141,909	1.9%
2015	92,440	-0.7%	48,533	-0.7%	140,973	-0.7%

*Note: Local Area Unemployment Statistics are a count of people employed by place of residence (not place of employment).*

Source: Florida Dept. of Economic Opportunity, Labor Market Information, Local Area Unemployment Statistics



## Workforce and Income

### Unemployment Rate

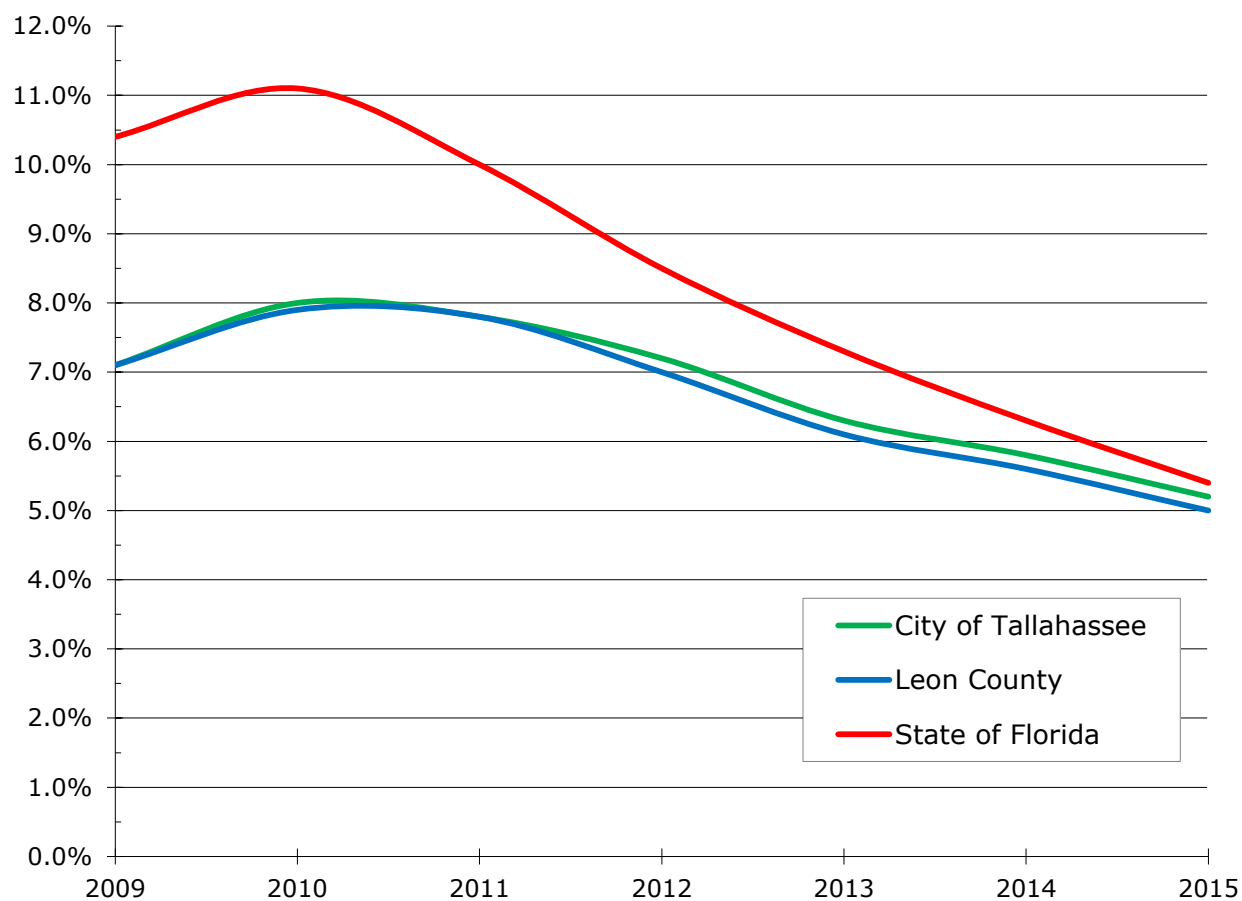
Trend: The unemployment rate in Leon County decreased to 5.0% in 2015, lower than the state average of 5.4%.

Year	City of Tallahassee	Leon County	State of Florida
2009	7.1%	7.1%	10.4%
2010	8.0%	7.9%	11.1%
2011	7.8%	7.8%	10.0%
2012	7.2%	7.0%	8.5%
2013	6.3%	6.1%	7.3%
2014	5.8%	5.6%	6.3%
2015	5.2%	5.0%	5.4%

Note: Local Area Unemployment Statistics are a count of people employed by place of residence (not place of employment).

Source: Florida Dept. of Economic Opportunity, Labor Market Information, Local Area Unemployment Statistics

### Unemployment Rate



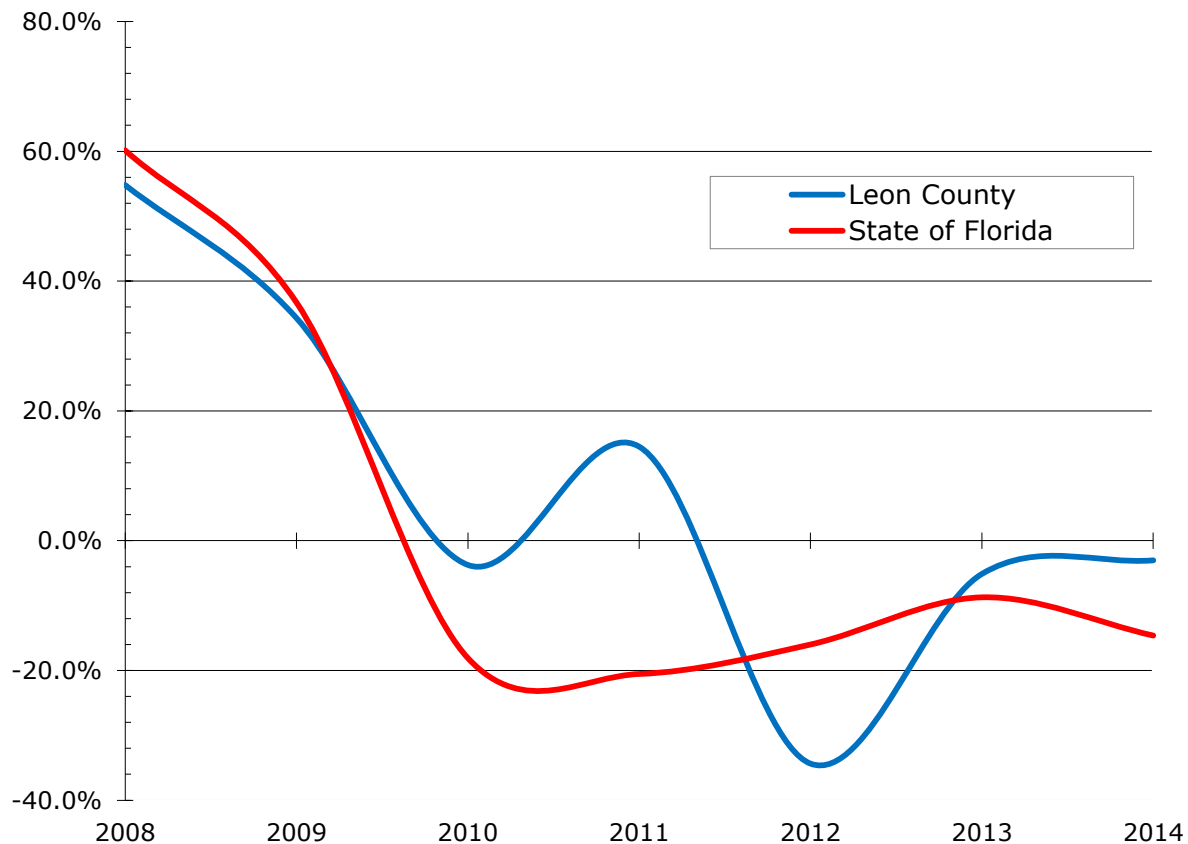
Trend: Initial claims for unemployment compensation declined for the third straight year in 2014.

Year	Leon County		State of Florida	
	Initial Unemployment Claims	Percent Change from Prior Year	Initial Unemployment Claims	Percent Change from Prior Year
2008	9,168	54.8%	1,022,216	60.1%
2009	12,313	34.3%	1,397,484	36.7%
2010	11,853	-3.7%	1,144,823	-18.1%
2011	13,570	14.5%	909,713	-20.5%
2012	8,908	-34.4%	764,167	-16.0%
2013	8,452	-5.1%	697,457	-8.7%
2014	8,196	-3.0%	595,498	-14.6%

Note: Local Area Unemployment Statistics are a count of people employed by place of residence (not place of employment).

Source: Florida Dept. of Economic Opportunity, Labor Market Information, Local Area Unemployment Statistics

**Initial Unemployment Claims, Percent Change from Prior Year**



## Workforce and Income

### Employment by Industry:

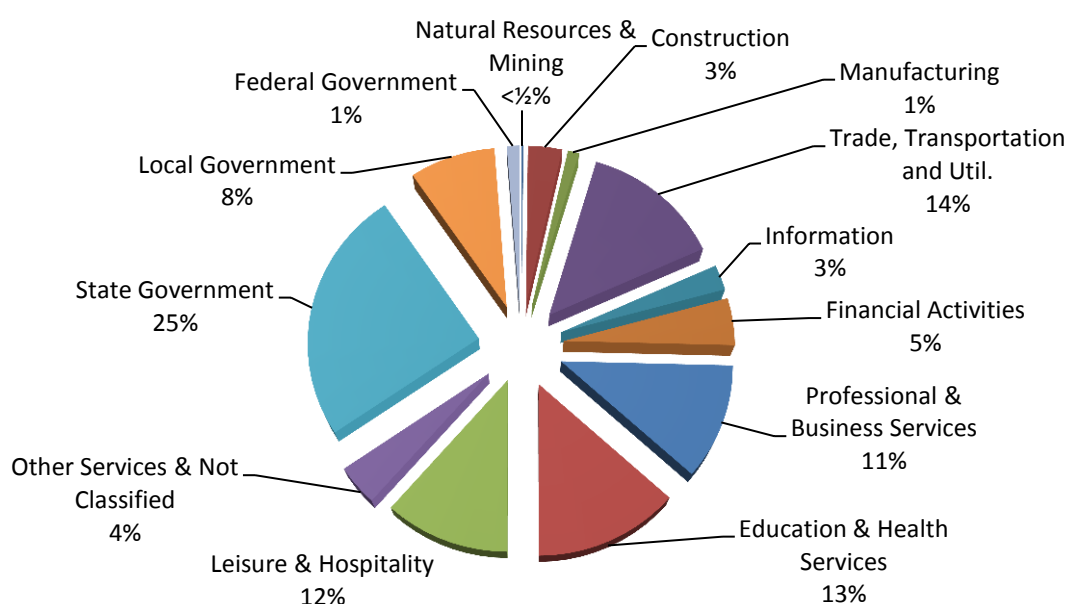
#### Non-Agricultural Employment by Industry, 2009-2014

Trend: Between 2009 and 2014, non-agricultural employment in Leon County decreased on average 0.8% per year. Education & Health Services and Leisure & Hospitality exhibited the strongest growth (up 1.2% per year). Federal Government exhibited minimal annual industries experienced declining average annual employment during the period. average gains while all other major

Industry Type	2009	2010	2011	2012	2013	2014	Avg. Annual Change
Natural Resources & Mining	151	174	153	221	225	287	3.0%
Construction	5,339	4,794	4,541	4,344	4,654	4,678	-7.6%
Manufacturing	1,964	1,934	1,695	1,660	1,538	1,562	-8.0%
Trade, Transportation and Util.	18,506	18,271	18,388	18,275	18,667	19,322	-1.2%
Information	3,098	2,793	2,863	2,929	3,036	3,502	-4.2%
Financial Activities	6,639	6,393	6,486	6,418	6,541	6,504	-1.7%
Professional & Business Services	16,085	15,822	15,950	15,542	15,602	15,864	-1.5%
Education & Health Services	17,569	17,857	18,236	18,215	18,003	18,860	1.2%
Leisure & Hospitality	14,622	14,468	14,756	15,259	15,676	16,296	1.2%
Other Services & Not Classified	5,807	5,770	5,657	5,974	5,468	5,558	-2.6%
State Government	35,148	35,772	35,075	34,523	34,733	35,210	-0.3%
Local Government	12,124	11,997	12,212	12,203	11,982	11,808	-0.3%
Federal Government	1,732	1,823	1,692	1,679	1,721	1,720	0.0%
<b>Total</b>	<b>138,784</b>	<b>137,868</b>	<b>137,713</b>	<b>137,250</b>	<b>137,846</b>	<b>141,217</b>	<b>-0.8%</b>

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, QCEW - Quarterly Census of Employment and Wages (ES-202)

#### Non-Agricultural Employment by Industry, Leon County (2014)



## Workforce and Income

### Projected Employment by Industry:

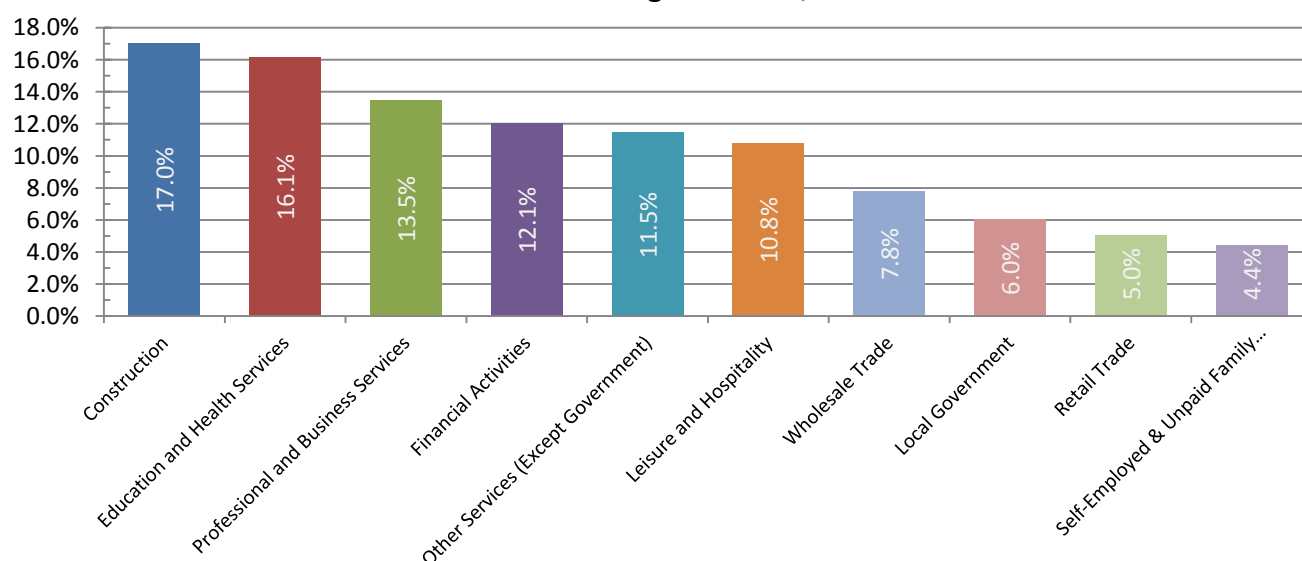
### Fastest Growing Industries in Leon County

Trend: In Leon County, Education and Health Services, Professional and Business Services and Leisure and Hospitality are projected to create the most jobs while Construction is expected to experience the largest annual percentage growth in employment by major industry between 2015 and 2023.

Industry	2015 Emp.	2023 Emp.	Total Emp. Change	Percent Growth
Construction	5,013	5,867	854	17.0%
Education and Health Services	19,627	22,794	3,167	16.1%
Professional and Business Services	17,733	20,121	2,388	13.5%
Financial Activities	6,979	7,820	841	12.1%
Other Services (Except Government)	7,222	8,051	829	11.5%
Leisure and Hospitality	16,749	18,555	1,806	10.8%
Wholesale Trade	2,425	2,614	189	7.8%
Local Government	11,682	12,385	703	6.0%
Retail Trade	16,397	17,223	826	5.0%
Self-Employed & Unpaid Family Workers	10,668	11,136	468	4.4%
Transportation and Warehousing	1,255	1,302	47	3.7%
Manufacturing	1,593	1,648	55	3.5%
Agriculture, Forestry, Fishing and Hunting	284	289	5	1.8%
State Government	40,195	40,740	545	1.4%
Information	3,915	3,922	7	0.2%
Federal Government	1,727	1,567	-160	-9.3%
<b>Total All Industries</b>	<b>163,558</b>	<b>176,125</b>	<b>12,567</b>	<b>7.7%</b>

Source: Florida Department of Economic Opportunity, Labor Market Information, Florida Employment Projections

### Ten Fastest Growing Industries, 2015-2023



## Workforce and Income

### Projected Employment by Occupation:

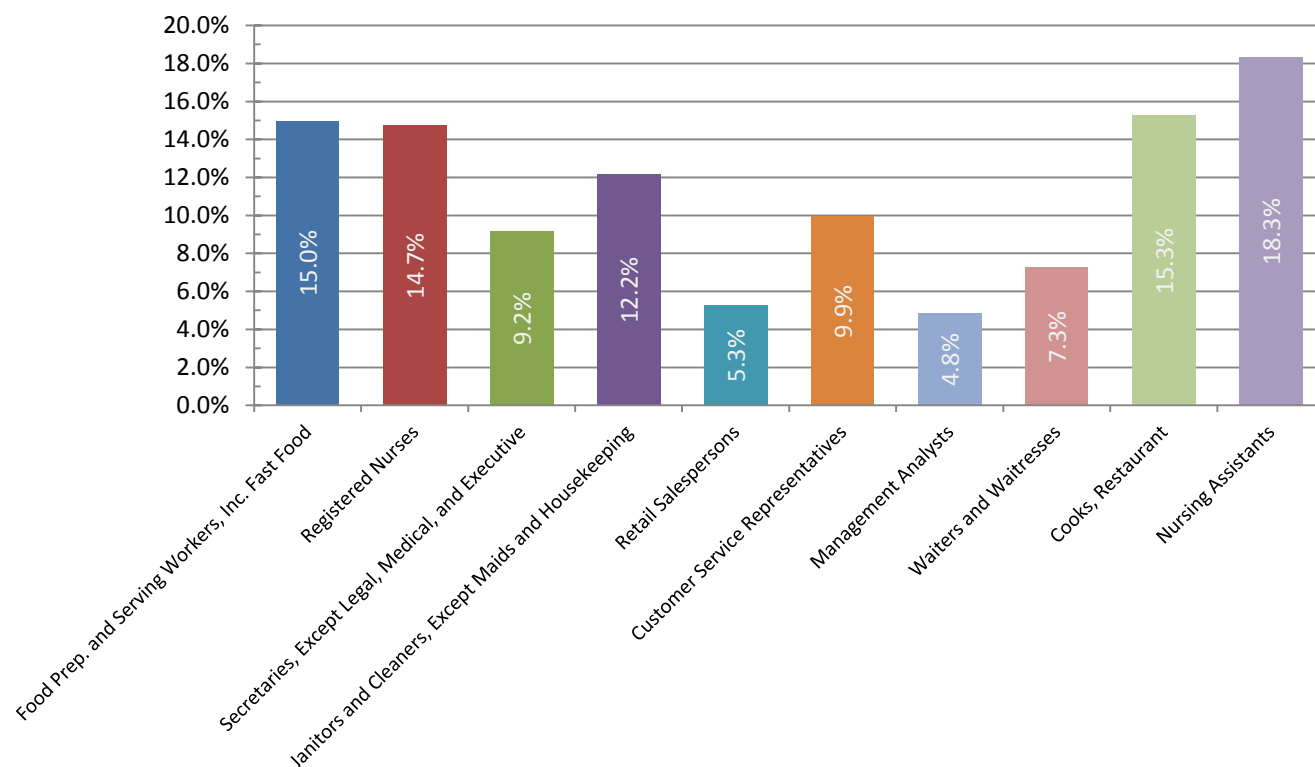
#### Occupations Gaining the Most New Jobs (2015-2023)

Trend: By total employment change, Food Prep. and Serving Workers and Registered Nurses are the occupations projected to add the most jobs by 2023.

Industry	2015 Emp.	2023 Emp.	Total Emp. Change	Percent Growth
Food Prep. and Serving Workers, Inc. Fast Food	4,919	5,656	737	15.0%
Registered Nurses	2,930	3,362	432	14.7%
Secretaries, Except Legal, Medical, and Executive	4,281	4,673	392	9.2%
Janitors and Cleaners, Except Maids and Housekeeping	3,071	3,445	374	12.2%
Retail Salespersons	5,854	6,164	310	5.3%
Customer Service Representatives	2,827	3,108	281	9.9%
Management Analysts	5,768	6,047	279	4.8%
Waiters and Waitresses	2,910	3,121	211	7.3%
Cooks, Restaurant	1,356	1,563	207	15.3%
Nursing Assistants	1,107	1,310	203	18.3%

Source: Florida Department of Economic Opportunity, Labor Market Information, Florida Employment Projections

#### Occupations Gaining the Most New Jobs, 2015-2023





## Workforce and Income

### Projected Employment by Occupation:

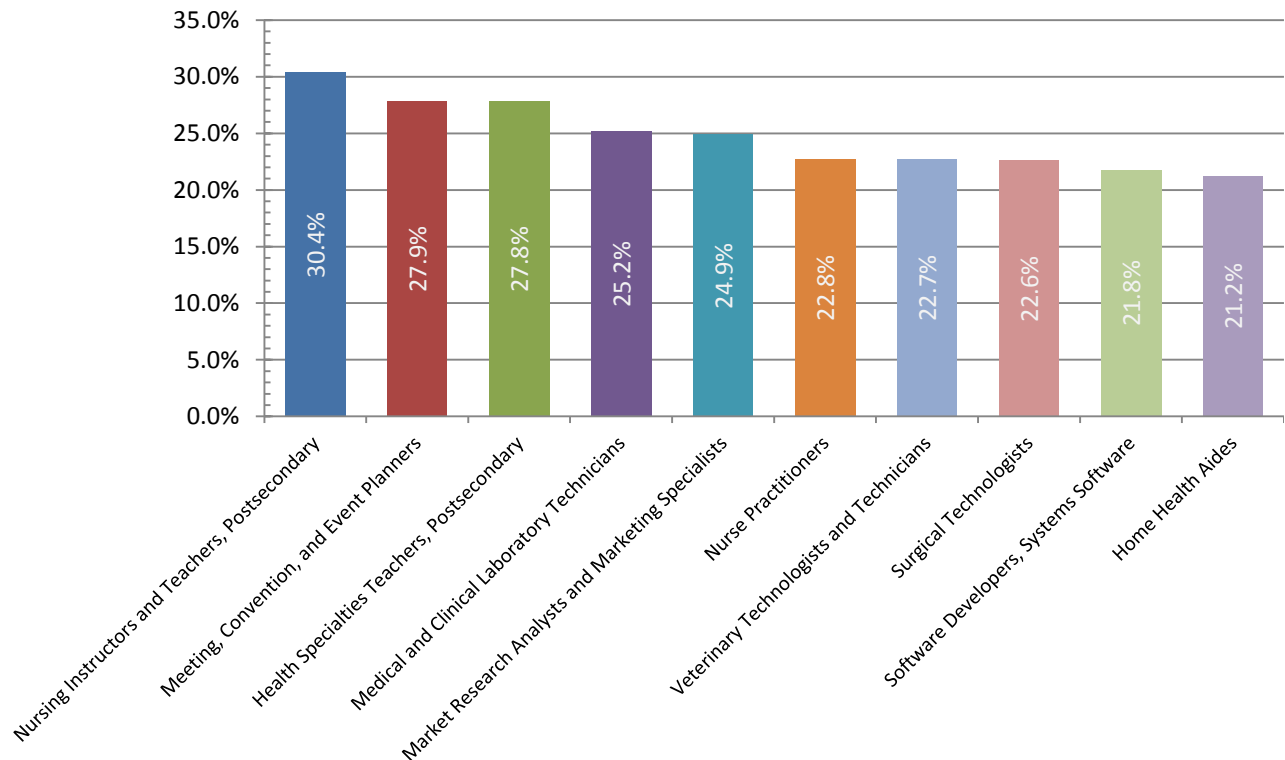
### Fastest Growing Occupations in Leon County (2015-2023)

Trend: The top occupation by projected annual percentage growth in Leon County is Nursing Instructors and Teachers, Postsecondary.

Industry	2015 Emp.	2023 Emp.	Total Emp. Change	Percent Growth
Nursing Instructors and Teachers, Postsecondary	125	163	38	30.4%
Meeting, Convention, and Event Planners	122	156	34	27.9%
Health Specialties Teachers, Postsecondary	532	680	148	27.8%
Medical and Clinical Laboratory Technicians	163	204	41	25.2%
Market Research Analysts and Marketing Specialists	345	431	54	24.9%
Nurse Practitioners	123	151	28	22.8%
Veterinary Technologists and Technicians	176	216	40	22.7%
Surgical Technologists	146	179	33	22.6%
Software Developers, Systems Software	124	151	52	21.8%
Home Health Aides	871	1,056	185	21.2%

Source: Florida Department of Economic Opportunity, Labor Market Information, Florida Employment Projections

### Fastest Growing Occupations, Percent Growth 2015-2023





## Workforce and Income

### Employment:

#### Major Employers (2015)

Size	Employer	Employees
5,000+ employees	State of Florida	22,612
	Florida State University	12,512
4,999 to 2,000	Leon County Schools	4,550
	Publix Supermarket	3,439
	Tallahassee Memorial Healthcare, Inc.	3,190
	City of Tallahassee	2,736
	Walmart Stores, Inc.	2,117
1,999 to 1,000	Leon County	1,919
	Florida A&M University	1,759
	Tallahassee Community College	1,631
	Capital Regional Medical Center	1,151
999 to 300	ACS, A Xerox Company	700
	Capital City Bank Group	532
	St. Marks Powder, a General Dynamics Company	452
	Veterans of Foreign Wars	450
	Capital Health Plan	425
	Apalachee Center, Inc.	400
	Westminister Oaks	379
	University Center Club	300
	Big Bend Hospice	300
299 to 200	CenturyLink	278
	Florida Bar	250
	General Dynamics Lands System	250
	Tallahassee Primary Care Associates	244
	Danfoss Turbocor	202
	Dale Earnhardt Jr. Chevrolet	200
	Capital Healthcare Center	200
199 to 100	Syn-tech Systems	180
	Comcast Cable	175
	Hyatt Florida	174
	Leon County Health Department	172
	Teligent EMS	170
	T-Formations	170
	Miracle Hill Nursing and Rehabilitation Center	165
	Tallahassee Democrat	160
	The Zimmerman Agency	160
	First American Title Company	160
	GT Technologies	156



## Workforce and Income

### Employment:

#### Major Employers (2015)

Size	Employer	Employees
199 to 100 (cont.)	Select Specialty	155
	Culpepper Construction	154
	Tandem Health Care	152
	Apalachee Center for Human Services	150
	Health South	150
	Centre Point Health and Rehab	150
	Parole Commission	149
	Consulate Health Care	140
	First Commerce Credit Union	136
	Miracle Village Independent Living	135
	Proctor Dealerships	130
	Tallahassee Development Center	125
	Brynwood Center	120
	First Baptist Church	120
	Capital Area Community Action	110
	Leon Advocacy and Resource Center	101
	FSU Foundation, Inc.	100
	Heritage Healthcare	100
	Learning Systems Institute	100
	Tallahassee Memorial Rehab Center	100

## Workforce and Income

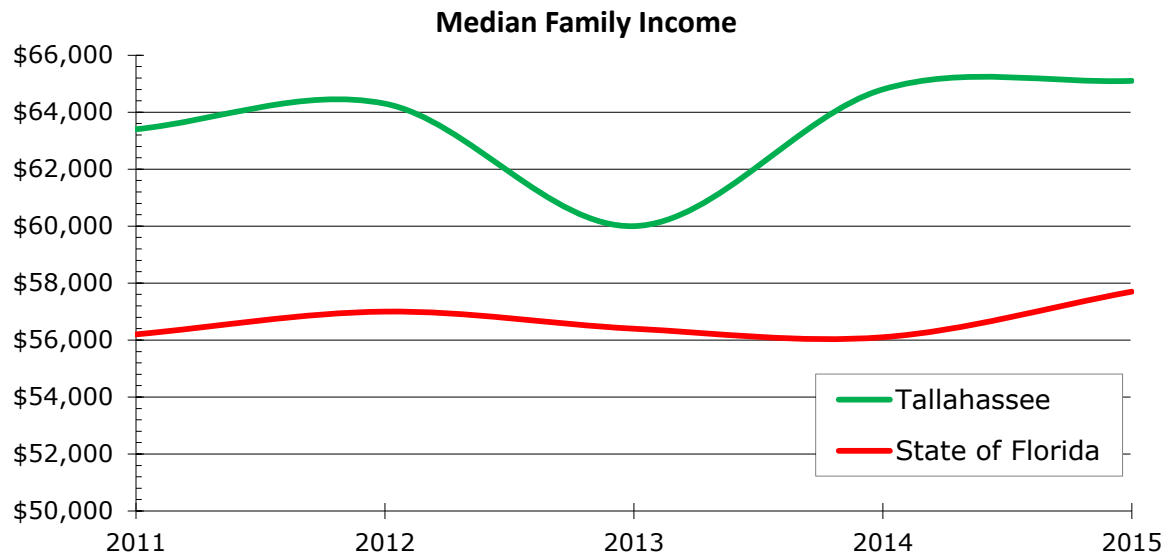
### Median Family Income

Trend: The median family income in 2014 in Leon County was \$68,943 according to the Census Bureau's 2010-2014 5-Year American Community Survey.

Year	Tallahassee	State of Florida
2011	\$63,400	\$56,200
2012	\$64,300	\$57,000
2013	\$60,000	\$56,400
2014	\$64,800	\$56,100
2015	\$65,100	\$57,700

Note: HUD's Core-Based Statistical Area (CBSA) definition for median family income estimates for Tallahassee includes Leon, Gadsden and Jefferson Counties.

Source: U.S. Department of Housing and Urban Development (HUD)



Median Family Income 2014, by jurisdiction

	2014
Leon County	\$68,943
Tallahassee MSA*	\$63,551
City of Tallahassee	\$61,328
Florida	\$57,176

\*Note: Tallahassee MSA includes Leon, Gadsden, Jefferson and Wakulla Counties.

Source: U.S. Census Bureau, 2010-2014 5-Year American Community Survey

## Workforce and Income

### Occupational Employment and Wages

#### Occupations with Employment of 1,000+

Trend: The 2015 estimated average hourly wage for all occupations in the Tallahassee MSA is \$20.69 with the average wage being \$26.14 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2014	(2015 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Total All Occupations	158,760	\$20.69	\$16.17	\$9.79	\$26.14
Retail Salespersons	6,150	\$11.31	\$9.47	\$8.90	\$12.52
Comb. Food Pre. & Serving Workers, Inc. Fast Food	5,150	\$9.14	\$9.03	\$8.86	\$9.29
Management Analysts	4,680	\$26.82	\$24.01	\$19.32	\$30.57
Cashiers	4,490	\$9.63	\$9.27	\$8.93	\$9.98
Secretaries, Except Legal, Medical, and Executive	4,200	\$15.02	\$14.19	\$10.87	\$17.09
Office Clerks, General	3,170	\$12.43	\$11.54	\$9.22	\$14.03
Waiters and Waitresses	3,110	\$10.88	\$9.41	\$8.92	\$11.86
Registered Nurses	3,010	\$28.48	\$28.30	\$22.34	\$31.54
Janitors and Cleaners, Ex.Maids and Hskping.	2,930	\$10.47	\$9.67	\$8.87	\$11.27
Customer Service Representatives	2,850	\$14.37	\$13.59	\$10.20	\$16.46
Accountants and Auditors	2,730	\$27.59	\$23.52	\$16.68	\$33.04
Business Operations Specialists, All Other	2,240	\$32.36	\$30.39	\$19.97	\$38.57
Executive Secretaries and Administrative Assistants	2,180	\$19.58	\$18.10	\$14.33	\$22.22
Lawyers	2,070	\$53.34	\$41.56	\$27.96	\$66.04
Stock Clerks and Order Fillers	1,880	\$11.28	\$10.55	\$8.91	\$12.47
First-Line Supervisors/Mgrs of Retail Sales Workers	1,580	\$21.05	\$18.59	\$12.70	\$25.21
General and Operations Managers	1,520	\$58.38	\$50.96	\$30.19	\$72.48
Bookkeeping, Accounting, and Auditing Clerks	1,490	\$16.67	\$16.04	\$11.73	\$19.14
Maintenance and Repair Workers, General	1,490	\$15.30	\$15.04	\$11.03	\$17.43
Comp. Ofcrs., Ex. Ag., Cons., Hlth., Safety & Trans.	1,450	\$19.33	\$17.27	\$14.20	\$21.89
Cooks, Restaurant	1,430	\$11.02	\$10.90	\$9.51	\$11.77
First-Line Supers./Mgrs. of Ofc. & Admin. Sup. Wkrs.	1,410	\$24.02	\$22.78	\$15.54	\$28.27
Receptionists and Information Clerks	1,320	\$12.20	\$11.55	\$9.27	\$13.66
Teacher Assistants	1,310	\$26,400	\$25,081	\$20,355	\$29,421
Sales Reps., Services, All Others	1,290	\$27.82	\$21.70	\$13.74	\$34.86
Nursing Assistants	1,250	\$11.33	\$11.07	\$9.78	\$12.09
Counter Attendants, Cafeteria, Coffee Shop	1,240	\$9.51	\$9.12	\$8.91	\$9.81
Computer Network Architects	1,230	\$31.15	\$26.82	\$20.62	\$36.42
First Line Supervisors Food Prep. & Serving Workers	1,160	\$16.01	\$14.97	\$11.68	\$18.17
Elementary School Teachers, Except Spec. Education	1,150	\$43,877	\$43,656	\$32,240	\$49,694
Maids and Housekeeping Cleaners	1,120	\$9.47	\$9.20	\$8.88	\$9.77

## Workforce and Income

### Occupational Employment and Wages

#### Occupations with Employment of 1,000+

Trend: The 2015 estimated average hourly wage for all occupations in the Tallahassee MSA is \$20.69 with the average wage being \$26.14 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2014	(2015 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Laborers and Freight, Stock & Material Movers, Hand	1,090	\$11.68	\$10.87	\$8.92	\$13.06
Police and Sheriff's Patrol Officers	1,020	\$24.11	\$22.33	\$16.59	\$27.86
Tax Examiners and Collectors, and Revenue Agents	1,000	\$19.70	\$16.71	\$14.00	\$22.55

\* *Entry Wage* - This is the wage an entry-level worker might expect to make. It is defined as the average (mean) wage earned by the lowest third of all workers in a given occupation.

\*\* *Experienced Wage* - This wage represents what an experienced worker might expect to make. It is defined as the average (mean) wage earned by the upper two-thirds of all workers in a given occupation.

Source: Florida Department of Economic Opportunity, Labor Market Information, Occ. Emp. Statistics & Wages

## Workforce and Income

### Average Annual Employment/Wages

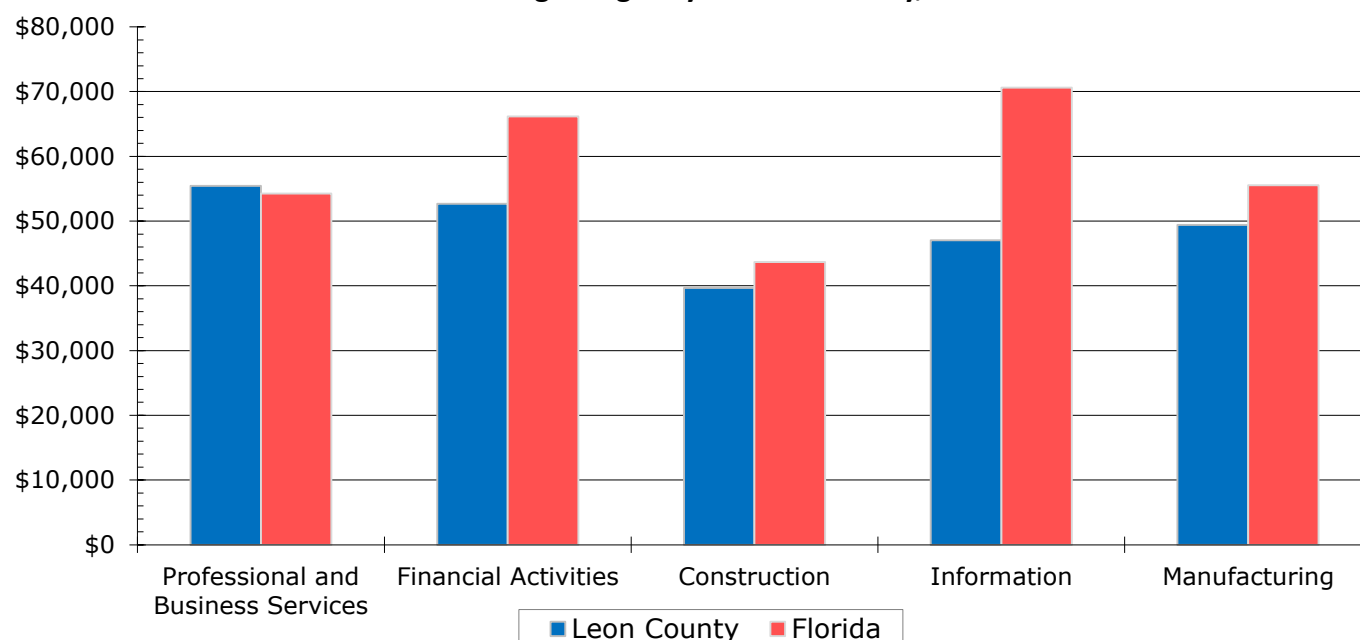
#### Average Annual Employment & Wages, Select Private Industries

Trend: The average annual wage in Leon County in 2014 was \$41,111, 8.2% below the state average wage of \$44,803. The annual average state government wage was 2.4% higher in Leon County compared to the state average while the local government wage in Leon County was 11.6% lower than the state average.

Industry Type	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
<b>Leon County</b>			
Professional and Business Services	2,044	15,864	\$55,419
Financial Activities	886	6,504	\$52,687
Construction	687	4,678	\$39,687
Information	177	3,502	\$47,014
Manufacturing	124	1,562	\$49,391
<b>Florida</b>			
Professional and Business Services	144,643	1,165,228	\$54,245
Financial Activities	68,027	514,317	\$66,169
Construction	60,576	396,720	\$43,690
Information	10,622	136,691	\$70,634
Manufacturing	19,479	331,036	\$55,520

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Quarterly Census of Employment & Wages (ES-202)

#### Average Wages by Private Industry, 2014



## Workforce and Income

### Average Annual Employment/Wages

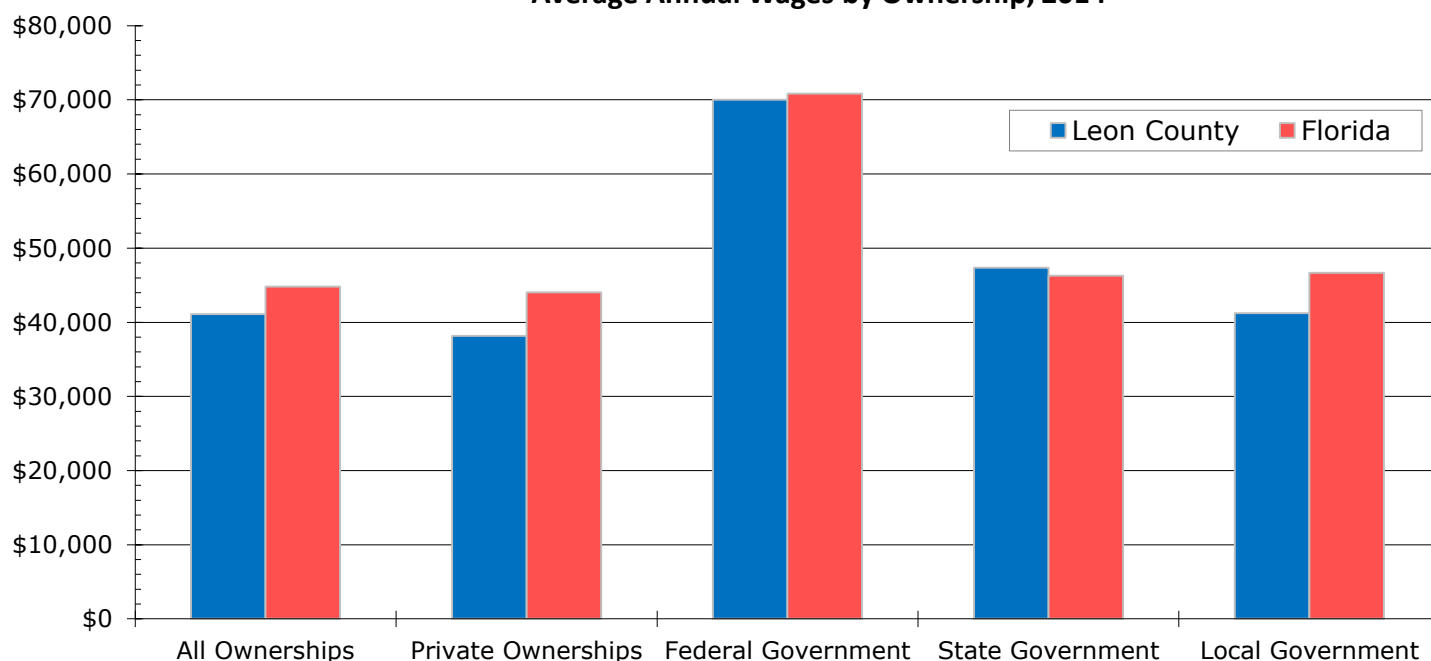
#### Average Annual Employment and Wages by Ownership

Trend: The average annual wage in Leon County in 2014 was \$41,111, 8.2% below the state average wage of \$44,803. The annual average state government wage was 2.4% higher in Leon County compared to the state average while the local government wage in Leon County was 11.6% lower than the state average.

Ownership Type	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
<b>Leon County</b>			
All Ownerships	8,390	141,217	\$41,111
Private Ownerships	8,132	92,479	\$38,175
Federal Government	48	1,720	\$70,027
State Government	186	35,210	\$47,365
Local Government	24	11,808	\$41,247
<b>Florida</b>			
All Ownerships	646,512	7,754,770	\$44,803
Private Ownerships	640,132	6,730,845	\$44,057
Federal Government	2,059	131,381	\$70,841
State Government	2,716	176,484	\$46,272
Local Government	1,605	716,060	\$46,677

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Quarterly Census of Employment & Wages (ES-202)

#### Average Annual Wages by Ownership, 2014







## Workforce and Income

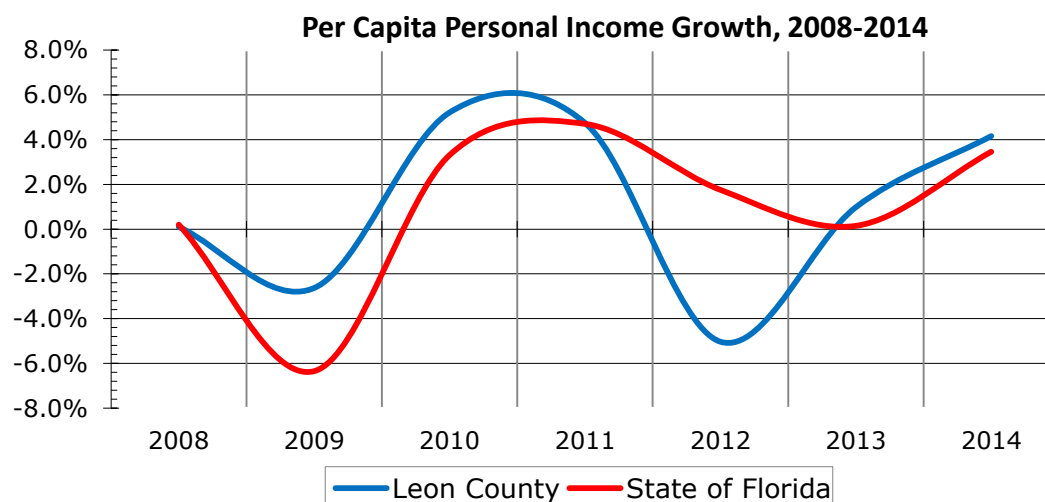
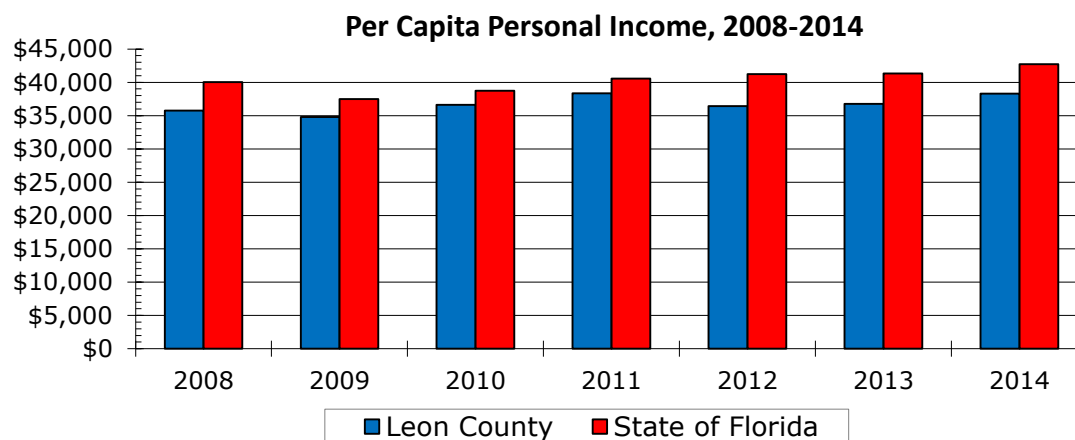
### Per Capita Personal Income

Trend: Per capita personal increased 4.2% in Leon County in 2014 and was 89.6% of the per capita income for the state. Since per capita personal income is calculated as the personal income of a given area divided by the resident population of the area, per capita personal income tends to be lower in Leon County due to the large number of college students residing in our community.

Year	Leon County	Percent Change from Prior Year	State of Florida	Percent Change from Prior Year
2008	\$35,740	0.1%	\$40,018	0.2%
2009	\$34,800	-2.6%	\$37,479	-6.3%
2010	\$36,613	5.2%	\$38,718	3.3%
2011	\$38,350	4.7%	\$40,538	4.7%
2012	\$36,421	-5.0%	\$41,249	1.8%
2013	\$36,777	1.0%	\$41,309	0.1%
2014	\$38,305	4.2%	\$42,737	3.5%

Note: Local Area Unemployment Statistics are a count of people employed by place of residence (not place of employment).

Source: Florida Dept. of Economic Opportunity, Labor Market Information, Local Area Unemployment Statistics



## Economic Factors

### Taxable Sales:

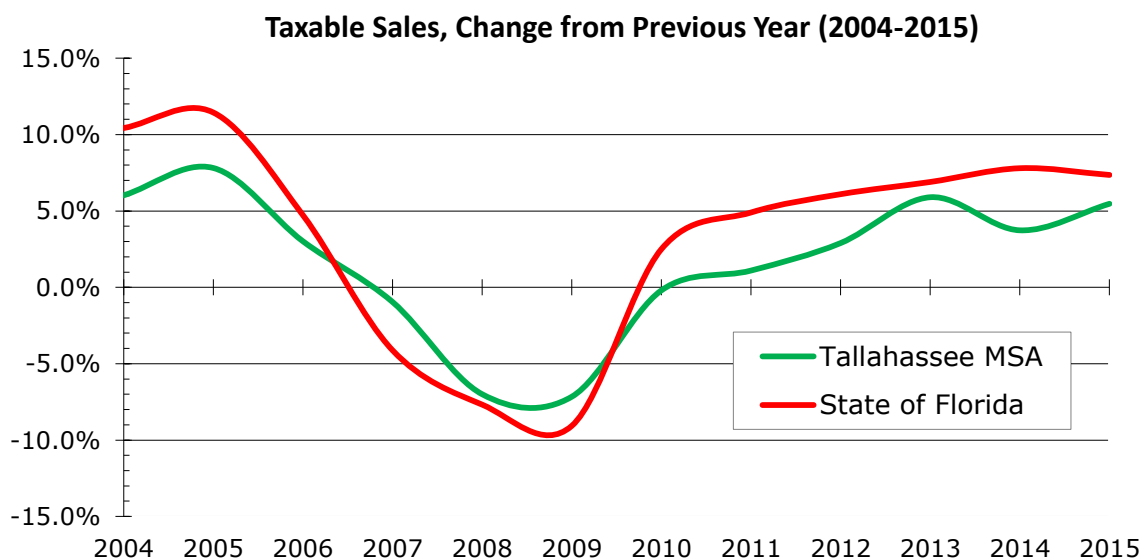
#### Annual Taxable Sales, Change from Previous Year

Trend: Taxable sales data for various Metropolitan Statistical Areas (MSAs) are popularly used as one indicator of regional economic activity. These data are derived from sales tax returns remitted to the state Department of Revenue each month. Taxable sales are those sales subject to Chapter 212, Florida Statutes. Generally speaking, the sales tax is levied on sales of goods, but not services, although there are some taxable services. The overall level of taxable sales increased 5.5% in the Tallahassee MSA in 2015. Taxable sales for the State of Florida were up 7.4% in 2015 compared with 2014.

Year	Tallahassee MSA	Change from Previous Year	State of Florida	Change from Previous Year
2004	\$3,995.5	6.0%	\$294,110.3	10.4%
2005	\$4,307.8	7.8%	\$327,787.6	11.5%
2006	\$4,437.9	3.0%	\$343,300.1	4.7%
2007	\$4,395.5	-1.0%	\$329,168.7	-4.1%
2008	\$4,088.0	-7.0%	\$303,900.9	-7.7%
2009	\$3,795.2	-7.2%	\$276,339.4	-9.1%
2010	\$3,787.1	-0.2%	\$283,130.1	2.5%
2011	\$3,828.7	1.1%	\$296,997.6	4.9%
2012	\$3,941.3	2.9%	\$314,951.3	6.1%
2013	\$4,174.5	5.9%	\$336,825.7	6.9%
2014	\$4,330.4	3.7%	\$363,097.2	7.8%
2015	\$4,567.3	5.5%	\$389,813.4	7.4%

Note: Taxable sales in millions of dollars; Tallahassee MSA includes Leon, Gadsden, Jefferson & Wakulla County.

Source: Florida Department of Revenue



## Economic Factors

### Taxable Sales:

#### Annual Taxable Sales,

#### Tallahassee MSA by Category

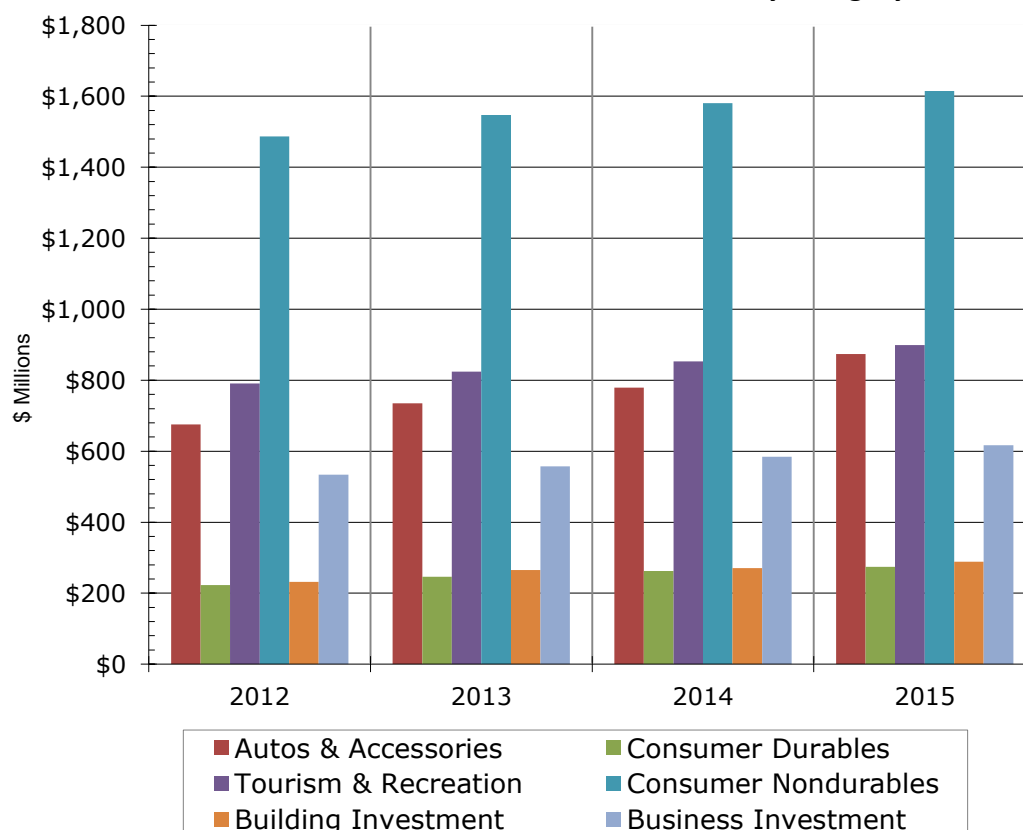
Trend: For the Tallahassee MSA, all six categories exhibited an increase in taxable sales between 2014 and 2015. Autos & Accessories (up 12.2%), Building Investment (up 6.6%), Business Investment (up 5.5%), Tourism & Recreation (up 5.4%), Consumer Durables (up 4.7%) and Consumer Nondurables (up 2.1%). It is estimated that taxable sales comprise 40-45% of all retail sales.

Category	2012	2013	2014	2015
Autos & Accessories	675.2	734.6	778.9	874.2
Consumer Durables	223	246.1	262.2	274.5
Tourism & Recreation	791	824.2	852.8	898.6
Consumer Nondurables	1486.5	1546.9	1581	1614.9
Building Investment	231.8	265.2	271	288.9
Business Investment	533.7	557.7	584.2	616.6

*Note: Taxable sales in millions of dollars; Tallahassee MSA includes Leon, Gadsden, Jefferson & Wakulla County.*

*Source: Florida Department of Revenue*

#### Annual Taxable Sales in Tallahassee MSA, by Category



## Economic Factors

### Bank Deposits:

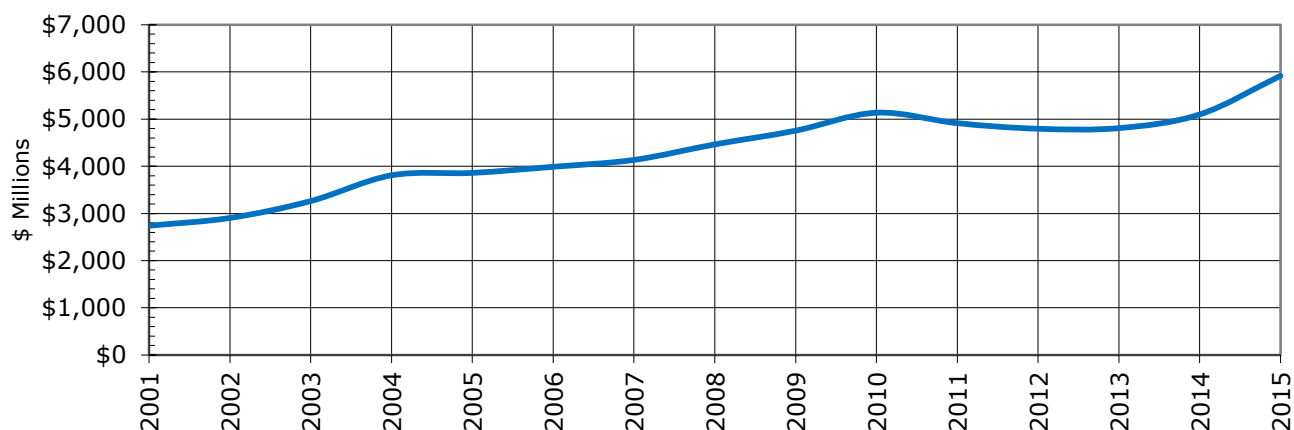
### FDIC Summary of Deposits

Trend: Over \$5.9 billion in deposits were held in Leon County in FDIC-insured institutions as of June 30, 2015. Total Leon County deposits increased 16% between 2014 and 2015. The Summary of Deposits (SOD) is the annual survey of branch office deposits as of June 30 for all FDIC-insured institutions, including insured U.S. branches of foreign banks. During 2001-2015, Leon County's bank deposits accounted for 1.1-1.3% of State total.

As of June 30	Leon County - All Institutions			Florida - All Institutions		
	Institutions	Offices	Deposits (\$ millions)	Institutions	Offices	Deposits (\$ millions)
<b>2001</b>	13	68	\$2,740	349	4,667	\$222,797
<b>2002</b>	14	67	\$2,905	349	4,626	\$242,821
<b>2003</b>	14	69	\$3,263	352	4,732	\$268,174
<b>2004</b>	14	76	\$3,809	353	4,897	\$300,961
<b>2005</b>	14	80	\$3,860	349	5,081	\$342,821
<b>2006</b>	14	81	\$3,989	365	5,310	\$363,415
<b>2007</b>	14	83	\$4,135	376	5,600	\$373,711
<b>2008</b>	19	96	\$4,464	381	5,772	\$380,281
<b>2009</b>	20	96	\$4,755	368	5,820	\$400,979
<b>2010</b>	19	95	\$5,136	339	5,666	\$409,894
<b>2011</b>	18	92	\$4,914	313	5,616	\$411,157
<b>2012</b>	18	93	\$4,796	292	5,601	\$423,908
<b>2013</b>	17	82	\$4,809	281	5,548	\$441,108
<b>2014</b>	17	79	\$5,099	266	5,450	\$462,364
<b>2015</b>	18	78	\$5,918	253	5,388	\$502,930

Source: FDIC, Summary of Deposits

**FDIC Summary of Deposits, Leon County  
2001-2015**



## Economic Factors

### Annual Visitor Trends:

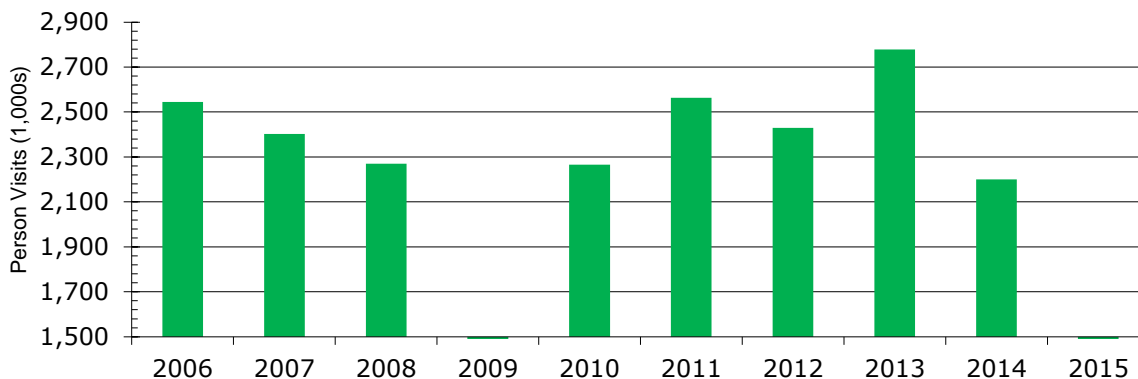
#### Person Visits and Visitor Spending

Trend: In calendar year 2014, just over 2.2 million people (person visits) visited Leon County, down 20.8% from calendar year 2013 levels. Visitor spending totaled \$572.6 million in 2014, 37.3% lower than total non-inflation adjusted visitor spending in 2013.

Year	Person Visits (1,000s)	Visitor Spending (\$ millions)
2006	2,545	\$749
2007	2,402	\$641
2008	2,270	\$587
2009	n/a	
2010	2,266	\$518
2011	2,564	\$577
2012	2,430	\$624
2013	2,778	\$914
2014	2,200	\$573
2015	n/a	

Source: Visit Tallahassee and Downs & St. Germain Research

**Annual Visitor Trends (Person Visits in Thousands)**



**Annual Visitor Trends (Visitor Spending in \$ Millions)**



## Economic Factors

### Quarterly Visitor Trends:

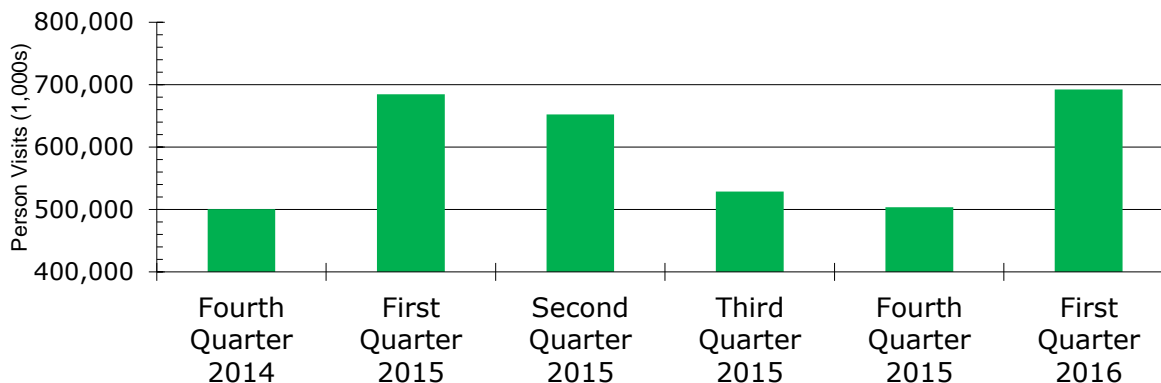
#### Person Visits and Visitor Spending

Trend: In the first quarter of 2016, 692,211 visitors visited Leon County, up 1.1% from first quarter 2015 levels. Direct expenditures of visitors totaled \$162.3 million in first quarter 2016, 6.1% higher than total non-inflation adjusted visitor spending in first quarter 2015.

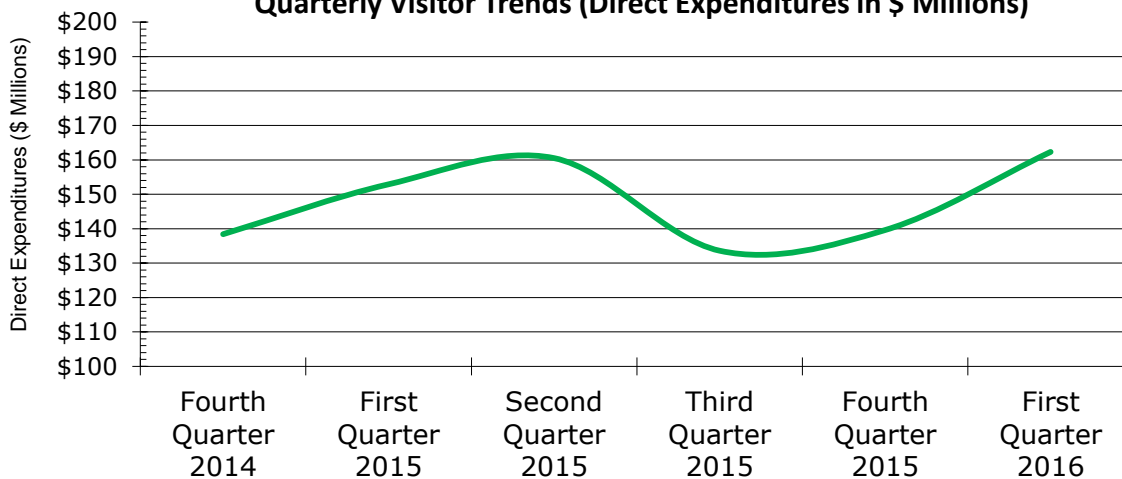
Quarter/Year	Visitors	Direct Expenditures (\$ millions)
Fourth Quarter 2014	500,741	138.4
First Quarter 2015	684,684	152.9
Second Quarter 2015	652,167	160.5
Third Quarter 2015	528,583	133.6
Fourth Quarter 2015	503,580	139.6
First Quarter 2016	692,211	162.3

Source: Visit Tallahassee and Downs & St. Germain Research

#### Quarterly Visitors



#### Quarterly Visitor Trends (Direct Expenditures in \$ Millions)

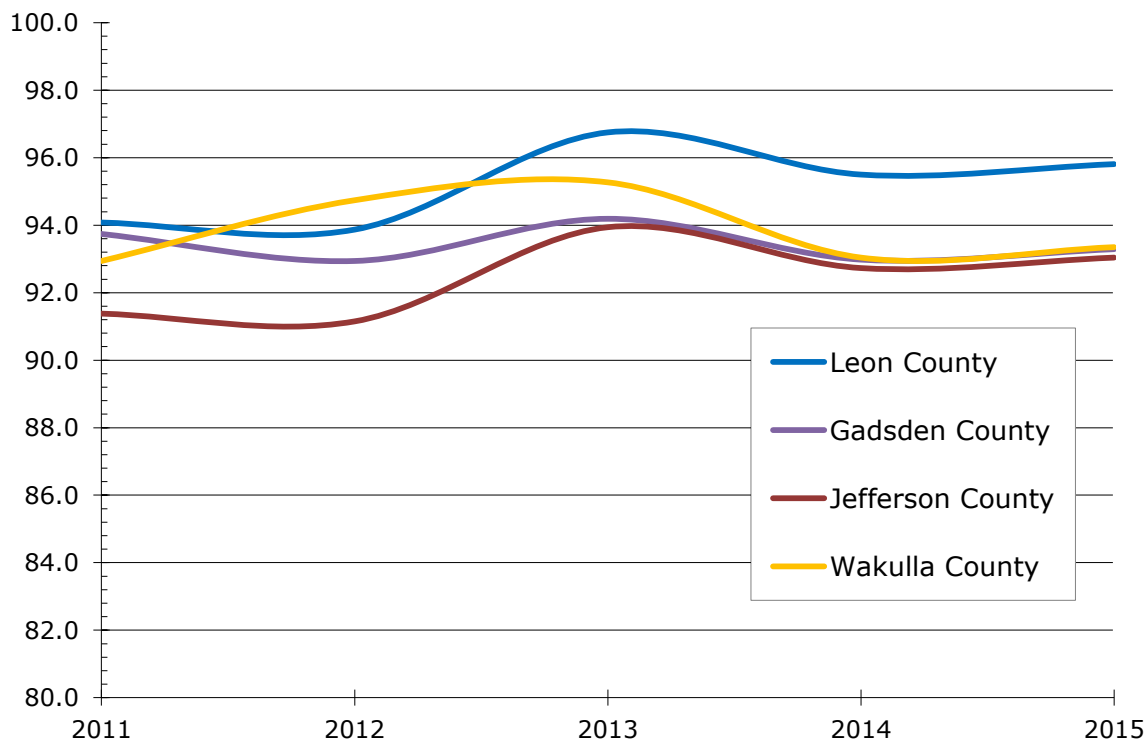


**Trend:** The Florida Price Level Index (FPLI) was established by the Legislature as the basis for the District Cost Differential (DCD) in the Florida Education Finance Program. It represents the costs of hiring comparable personnel across school districts. Extensive data on wages is used to estimate the relative cost of hiring comparable workers among Florida's 67 counties in a given year. The median Floridian, ranked by 2015 FPLI, lives in Lee County with an index value of 100.74. In 2015, the nine counties with index values greater than 100.74 together account for 49.8% of the state's population. Note: this is a cross-sectional measure that compares the relative wage levels among Florida's 67 counties and is not designed to measure inflation from one year to the next.

Year	Leon County	Gadsden County	Jefferson County	Wakulla County
2011	94.08	93.74	91.38	92.94
2012	93.87	92.94	91.15	94.74
2013	96.75	94.19	93.94	95.27
2014	95.50	92.98	92.73	93.04
2015	95.81	93.29	93.04	93.35

Source: Florida Department of Education, Funding & Financial Reporting

**Florida Price Level Index, Four County Area (2011-2015)**





## Economic Factors

### Gross Domestic Product by Metro Area

(\$ billions)

Trend: In 2014, the Tallahassee Metropolitan Area's (MSA) gross domestic product was \$14.2 billion, up \$0.4 billion from 2013. Real GDP in metropolitan areas increased 2.3% in 2014 after increasing 1.9% in 2013. Real GDP increased in 282 of the nation's 381 metropolitan areas in 2014 led by widespread growth in professional and business services, wholesale and retail trade, and the group of finance, insurance, real estate, rental, and leasing.

City	2009	2010	2011	2012	2013	2014
Tampa	109.9	110.4	111.6	117.1	122.4	128.2
Orlando	99.9	101.2	101.6	106.4	110.4	115.9
Jacksonville	56.3	57.4	57.6	59.9	61.9	65.1
Pensacola	13.8	14.3	14.6	14.6	15.2	15.9
<b>Tallahassee</b>	<b>13.3</b>	<b>13.5</b>	<b>13.4</b>	<b>13.4</b>	<b>13.8</b>	<b>14.2</b>
Gainesville	10.3	10.6	10.6	10.8	11.1	11.5
Panama City	7.0	7.2	7.0	6.8	7.1	7.6

Source: U.S. Department of Commerce, Bureau of Economic Analysis



## Economic Factors

### Consumer Price Index (CPI-U)

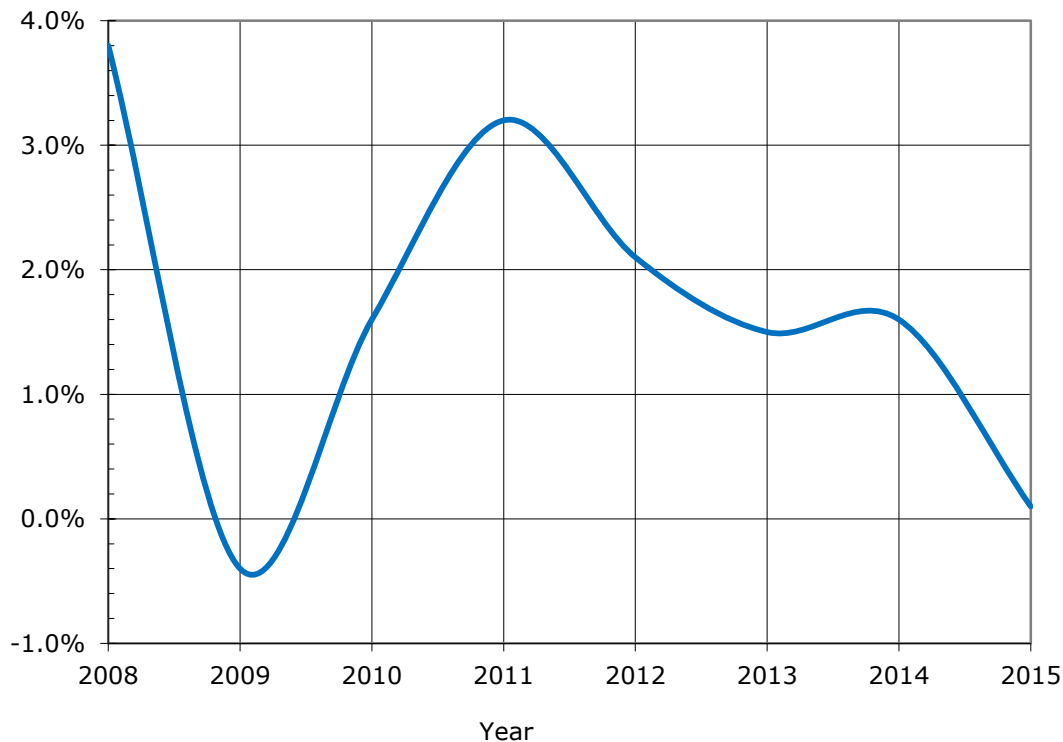
#### Annual Change in Consumer Price Index

Trend: The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 0.1% in 2015 following a 1.6% increase in 2014.

Year	U.S. City Average	% Change from Previous
<b>2008</b>	215.3	3.8%
<b>2009</b>	214.5	-0.4%
<b>2010</b>	218.1	1.6%
<b>2011</b>	224.9	3.2%
<b>2012</b>	229.6	2.1%
<b>2013</b>	233.0	1.5%
<b>2014</b>	236.7	1.6%
<b>2015</b>	237.0	0.1%

Source: U.S. Department of Labor, Bureau of Labor Statistics

**Consumer Price Index - All Urban Consumers (CPI-U)  
2008-2015**



## Economic Factors

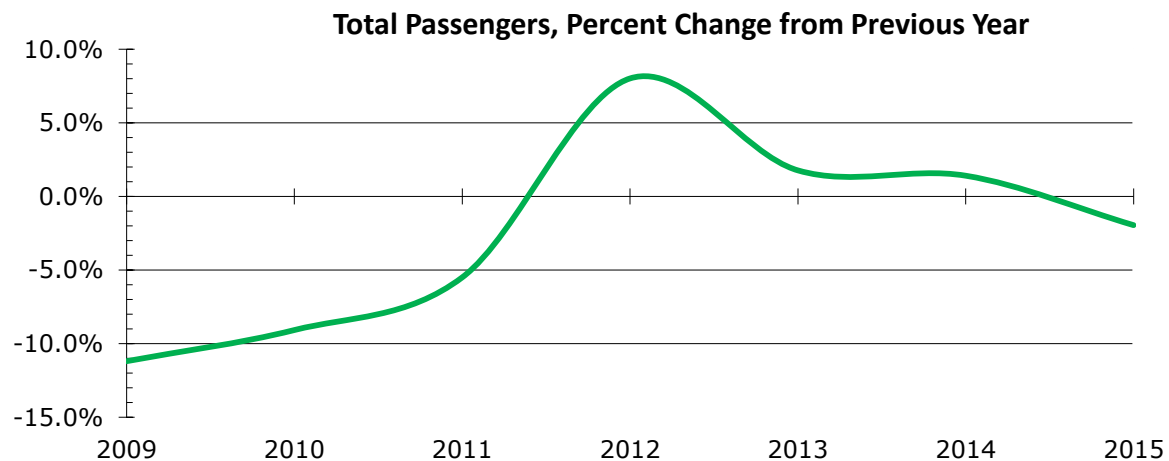
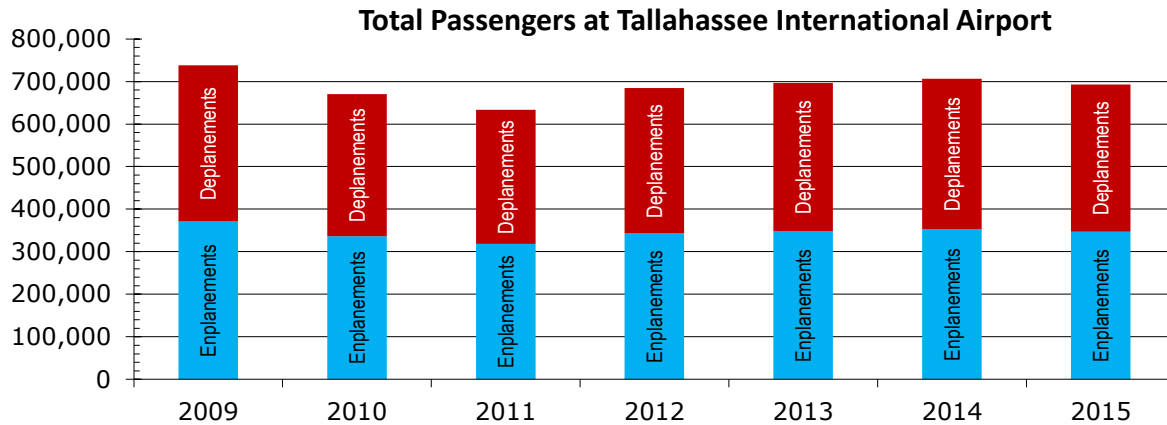
### Airport Traffic Statistics

#### Total Passengers at TLH

Trend: Passenger traffic at Tallahassee International Airport declined 2.0% in 2015 after increasing the previous three years.

Year	Enplanements	Deplanements	Total Passengers	Percent Change from Previous Year
2009	371,106	366,579	737,685	-11.2%
2010	336,598	334,099	670,697	-9.1%
2011	318,172	315,619	633,791	-5.5%
2012	344,078	340,533	684,611	8.0%
2013	348,185	348,539	696,724	1.8%
2014	353,253	353,275	706,528	1.4%
2015	346,926	345,798	692,724	-2.0%

Source: City of Tallahassee, Aviation Department

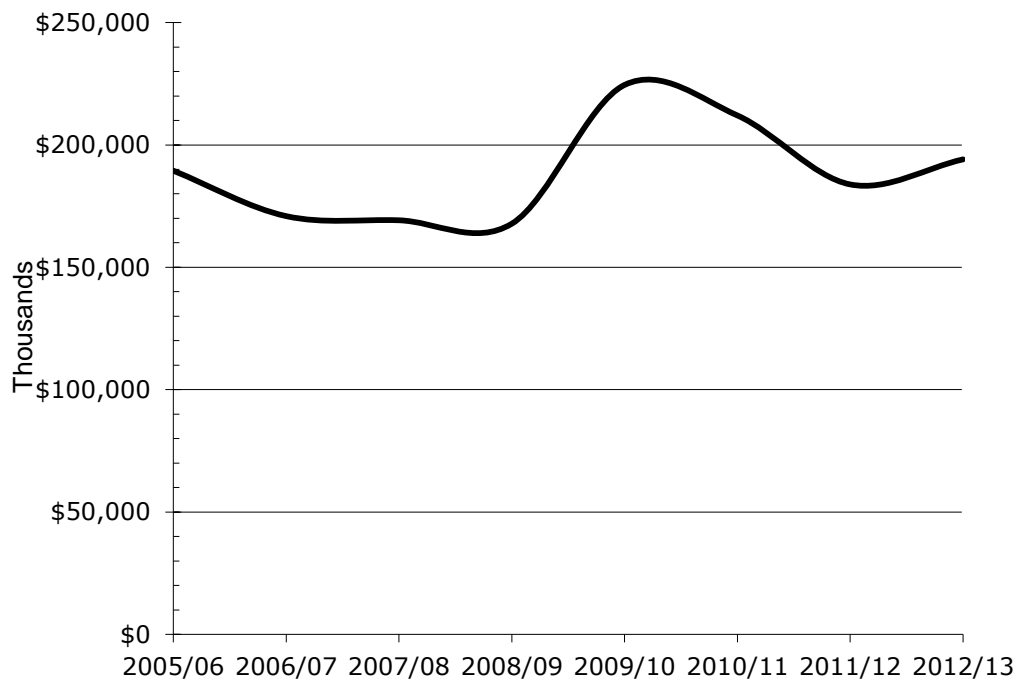


Trend: Between 2005/06 and 2012/13, FAMU and FSU together averaged around \$189 million per year in total federal awards (e.g., Health and Human Services, National Science Foundation, Dept. of Defense, Dept. of Education). The two universities annually accounted for around 19% of federal awards received among the 11 public institutions of the State University System of Florida.

Year	Federal Awards	
	\$1,000s	As percent of State University System federal awards
<b>2005/06</b>	189,464	20.9%
<b>2006/07</b>	170,913	18.9%
<b>2007/08</b>	169,211	19.1%
<b>2008/09</b>	167,810	17.6%
<b>2009/10</b>	224,517	18.3%
<b>2010/11</b>	212,035	19.5%
<b>2011/12</b>	183,851	17.4%
<b>2012/13</b>	194,091	18.9%

Source: Board of Governors, State University System of Florida, Office of Budget and Fiscal Policy

**Federal Awards to FAMU & FSU**



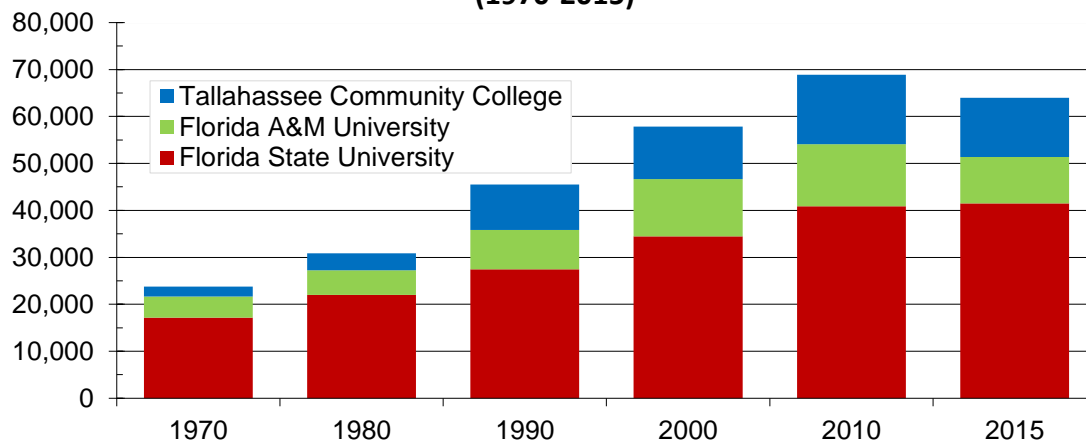
**Higher Education Institutions:  
 Enrollment**

Trend: Fall 2015 enrollment figures at Florida A&M University and Tallahassee Community College have trended downward.

Year	Florida State University	Florida A&M University	Tallahassee Community College	Total Enrollment
1960	9,019	2,961	---	11,980
1970	17,188	4,500	2,100	23,788
1980	21,965	5,246	3,663	30,874
1985	21,474	4,919	5,289	31,682
1990	27,427	8,379	9,679	45,485
1995	30,268	10,334	10,101	50,703
2000	34,485	12,161	11,207	57,853
2005	39,652	12,177	13,439	65,268
2006	40,474	11,913	13,526	65,913
2007	41,065	11,567	13,891	66,523
2008	39,136	11,848	14,016	65,000
2009	40,255	12,261	14,472	66,988
2010	40,838	13,277	14,756	68,871
2011	41,710	13,207	15,338	70,255
2012	41,301	12,051	14,613	67,965
2013	41,477	10,734	13,634	65,845
2014	41,773	10,229	13,045	65,047
2015	41,473	9,920	12,557	63,950

Source: State University System of Florida, Board of Governors; Office of Institutional Research, Budget & Analysis Dept, Florida State University; Institutional Research Office, Tallahassee Community College

**Fall Enrollment at Area Institutions of Higher Learning  
 (1970-2015)**



## Education

### Higher Education Institutions: Degrees Conferred

Trend: Between 2010 and 2014, on average 17,000 postsecondary degrees were conferred annually by higher education institutions, including an average of more than 1,100 doctoral degrees per year.

School	Degree Type	2010	2011	2012	2013	2014
<b>Flagler College-Tallahassee</b>	Bachelor's	183	180	186	136	172
<b>Florida A&amp;M University</b>	Associate's	47	67	59	102	113
	Bachelor's	1,242	1,296	1,466	1,488	1,560
	Master's	341	294	270	274	277
	Doctoral*	313	332	331	401	335
<b>Florida State University</b>	Associate's	98	111	163	133	192
	Bachelor's	7,926	7,886	7,860	7,938	8,105
	Master's	2,203	2,218	2,142	2,316	2,065
	Doctoral*	683	818	850	736	813
<b>ITT Technical Institute-Tallahassee</b>	Associate's	—	—	67	110	82
<b>Tallahassee Community College</b>	Associate's	2,872	2,657	3,278	2,687	2,523
<b>Year Total</b>		<b>15,908</b>	<b>15,859</b>	<b>16,672</b>	<b>16,321</b>	<b>16,237</b>

\* Includes research/scholarship and professional practice degrees.

Source: National Center for Education Statistics, Integrated Postsecondary Education Data System

**Higher Education Institutions:  
 Graduation Rate**

Trend: During 2010-2014, an average of over 6,000 students completed studies at a local higher education institution. The proportion of students completing a degree in 150% of time required (e.g., 3 years for a 2-year degree) varied among institutions.

**Completions**

School	2010	2011	2012	2013	2014
Florida A&M University	855	655	641	759	827
Florida State University	4,559	4,469	4,651	4,696	3,951
Tallahassee Community College	771	882	827	838	801
<b>Year Total</b>	<b>6,185</b>	<b>6,006</b>	<b>6,119</b>	<b>6,293</b>	<b>5,579</b>

**Graduation Rate\***

School	2010	2011	2012	2013	2014
Florida A&M University	41%	40%	40%	41%	40%
Florida State University	74%	74%	75%	77%	79%
Tallahassee Community College	37%	37%	33%	33%	32%
<b>National Average</b>	<b>53%</b>	<b>52%</b>	<b>52%</b>	<b>52%</b>	<b>52%</b>

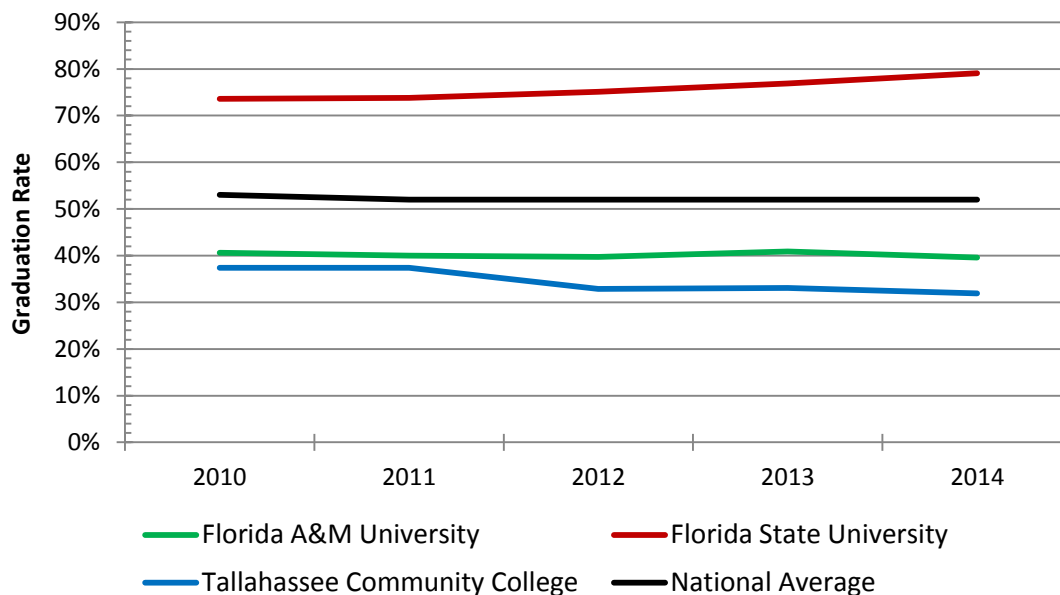
**Transfer Out Rate**

School	2010	2011	2012	2013	2014
Florida A&M University	5%	4%	4%	5%	4%
Florida State University	8%	8%	8%	7%	7%
Tallahassee Community College	20%	20%	19%	24%	23%

\* 150% time graduation rate, based on cohort year's newly enrolled students

Source: National Center for Education Statistics, Integrated Postsecondary Education Data System

**Graduation Rate, 2010-2014**



## Education

### Higher Education:

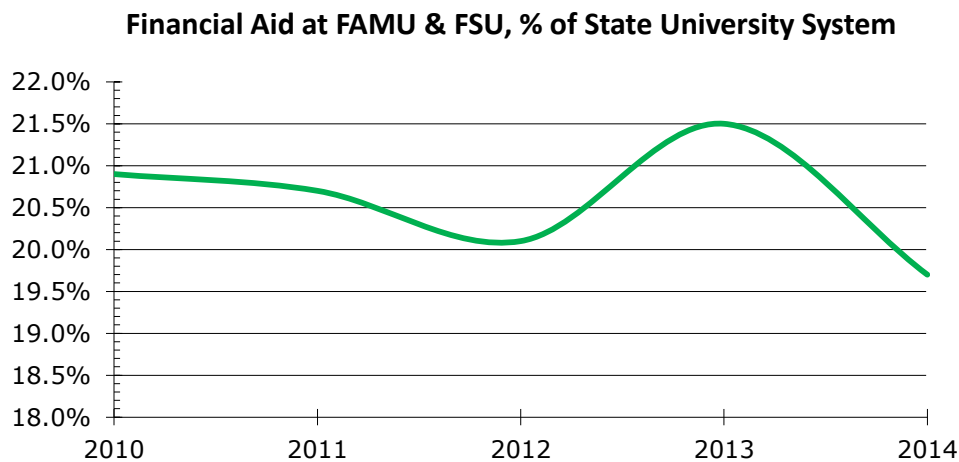
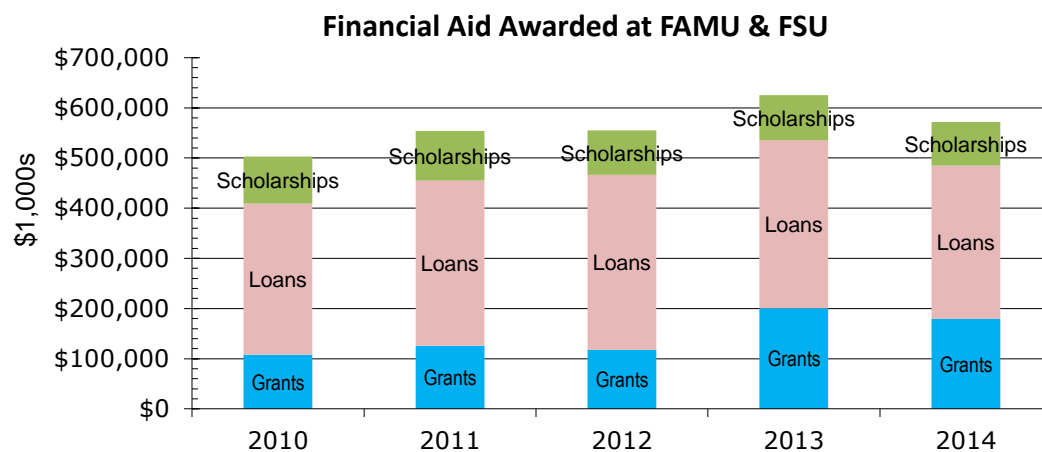
#### Financial Aid Awarded at FAMU & FSU

Trend: Between 2010 and 2014, FAMU and FSU together averaged around \$564 million per year in financial aid awards. The two universities annually account for around 21% of financial aid received among the 11 public institutions of the State University System of Florida.

Year	Grants		Loans		Scholarships		Total*	
	\$1,000s	% SUS	\$1,000s	% SUS	\$1,000s	% SUS	\$1,000s	% SUS
<b>2010</b>	107,858	19.4%	300,935	22.4%	94,169	18.4%	505,513	20.9%
<b>2011</b>	126,065	18.9%	328,967	22.2%	98,523	18.7%	555,872	20.7%
<b>2012</b>	117,310	18.4%	349,259	21.3%	88,625	18.3%	557,813	20.1%
<b>2013</b>	200,741	26.8%	334,820	19.8%	89,841	19.2%	628,333	21.5%
<b>2014</b>	179,278	24.1%	305,569	18.2%	86,503	18.2%	573,302	19.7%

\*Includes Grants, Loans, Scholarships, and Student Employment

Source: Board of Governors, State University System of Florida



**Higher Education:**

**Financial Aid\* Received at Local Institutions**

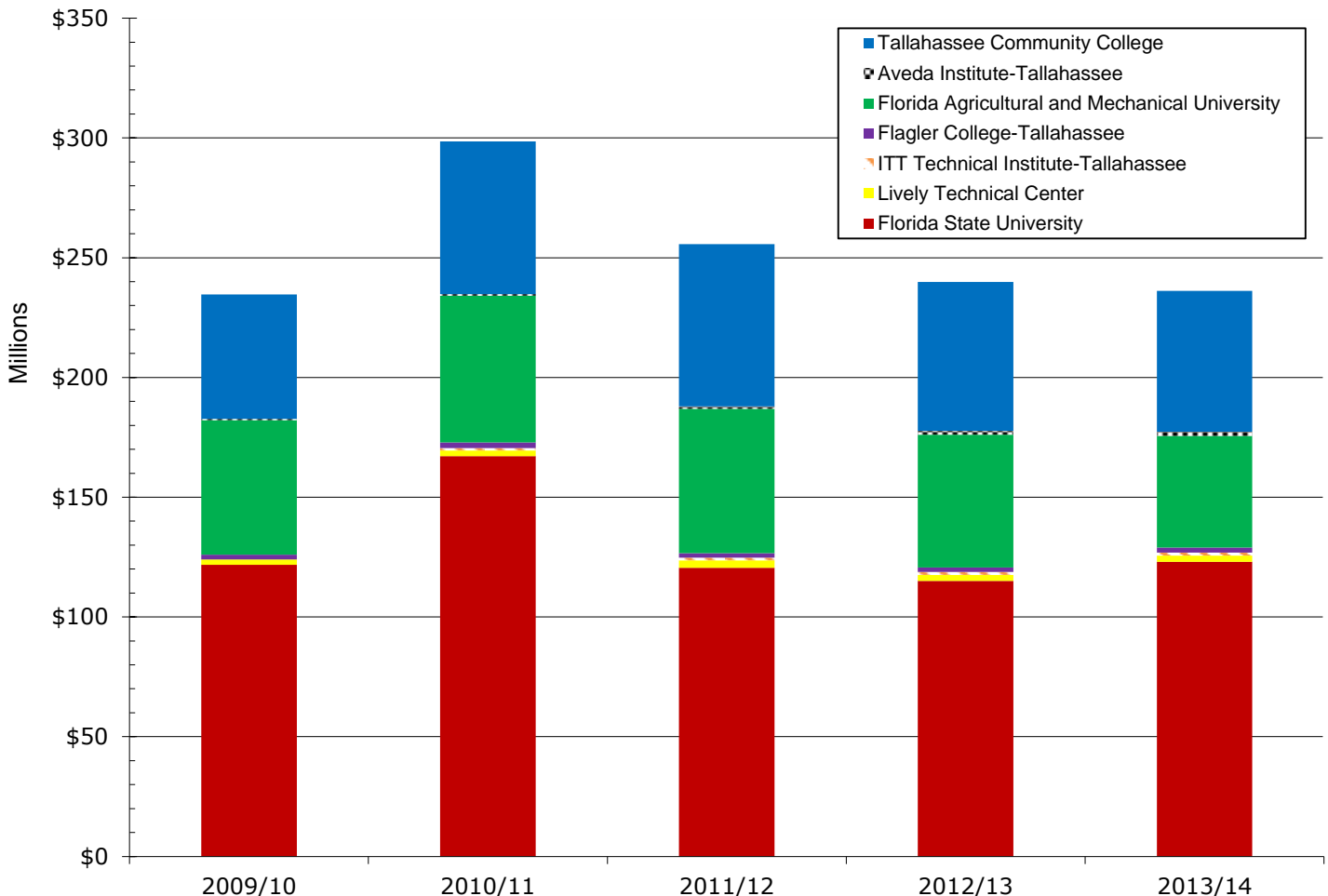
Trend: During 2009/10 to 2013/14, financial aid received by undergraduate students from all sources averaged \$253 million per year. FSU accounted for approximately 51%; TCC, 24%; FAMU, 22%; and other institutions, <3%.

Year	Aveda Institute-Tallahassee	Flagler College-Tallahassee	Florida Agricultural and Mechanical University	Florida State University	ITT Technical Institute-Tallahassee	Lively Technical Center	Tallahassee Community College
<b>2009/10</b>	\$512,912	\$2,083,545	\$56,106,756	\$121,786,193		\$2,177,128	\$51,977,206
<b>2010/11</b>	\$583,863	\$2,445,680	\$61,302,528	\$167,123,605	\$979,357	\$2,361,961	\$63,807,067
<b>2011/12</b>	\$945,208	\$1,927,117	\$60,314,634	\$120,579,251	\$1,121,278	\$3,025,807	\$67,806,333
<b>2012/13</b>	\$1,626,372	\$1,825,064	\$55,546,343	\$115,087,913	\$1,194,084	\$2,498,158	\$62,066,585
<b>2013/14</b>	\$1,657,550	\$2,058,865	\$46,713,045	\$122,996,264	\$1,275,123	\$2,623,416	\$58,782,304

\*Total amount of federal, state, local, institutional, or other sources of grant aid dollars received by undergraduate students

Source: National Center for Education Statistics, Integrated Postsecondary Education Data System

**Financial Aid Received at Local Institutions**







## Education

### Public Schools:

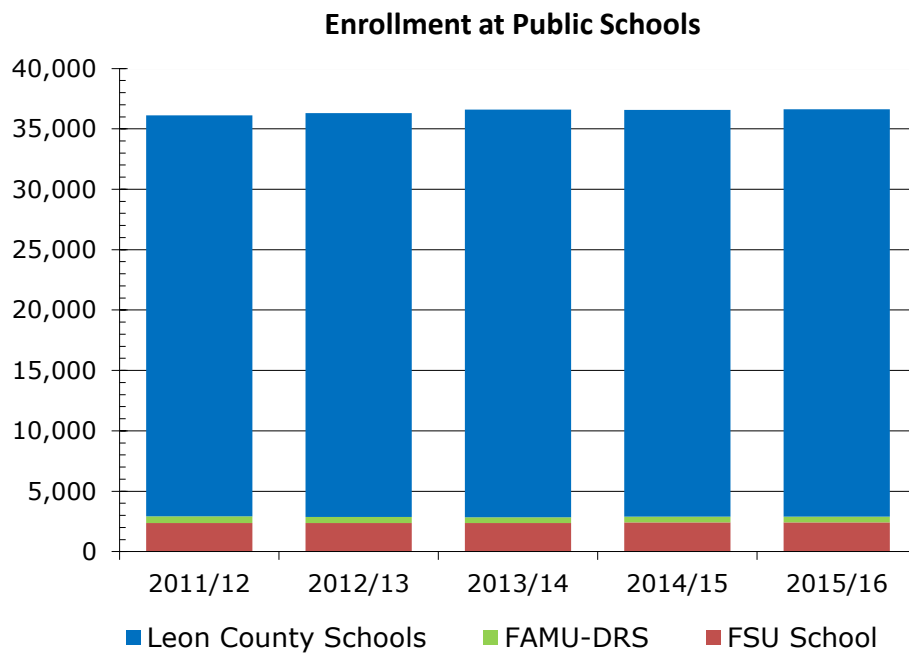
#### Enrollment

Trend: Public school enrollment has averaged around 36,400 over the past five years.

Year	FAMU-DRS	FSU School	Leon County Schools	Public School Enrollment
2011/12	536	2,378	33,218	36,132
2012/13	499	2,381	33,432	36,312
2013/14	486	2,370	33,747	36,603
2014/15	482	2,411	33,681	36,574
2015/16	484	2,411	33,737	36,632

Note: FAMU-DRS and FSU School are public schools sponsored by their respective universities and operated by the State of Florida.

Source: Florida Department of Education



## Education

### Public Schools:

#### School Grades

Trend: Between 2010 and 2015, more than half of all public schools in Leon County earned a grade of A or B.

<b>School Name</b>	<b>2015 Grade</b>	<b>2014 Grade</b>	<b>2013 Grade</b>	<b>2012 Grade</b>	<b>2011 Grade</b>	<b>2010 Grade</b>
Amos P. Godby High School	B	C	C	B	C	B
Apalachee Elementary School	C	B	C	D	C	C
Astoria Park Elementary School	D	C	C	B	A	A
Augusta Raa Middle School	B	A	C	B	A	A
Bond Elementary School	F	D	D	C	C	B
Buck Lake Elementary School	A	A	A	A	A	A
Canopy Oaks Elementary School	B	C	B	A	A	A
Chaires Elementary School	B	A	B	A	A	A
Deerlake Middle School	A	A	A	A	A	A
Desoto Trail Elementary School	A	A	A	A	A	A
Elizabeth Cobb Middle School	B	A	B	A	A	A
Fairview Middle School	A	B	B	B	B	A
FAMU-DRS*	C	C	C	D	C	C
FSU School*	A	A	A	A	A	A
Fort Braden Elementary School	C	B	C	C	B	C
Frank Hartsfield Elementary School	D	D	C	B	C	C
Gilchrist Elementary School	A	A	A	A	A	A
Governors Charter Academy	C	C	C			
Griffin Middle School	D	C	D	C	C	C
Hawks Rise Elementary School	A	A	A	A	A	A
Imagine School at Evening Rose	C	D	C	C	C	A
J. Michael Conley Elementary School	B	C	B	A	A	B
James Rickards High School	C	C	C	C	B	A
John G. Riley Elementary School	D	D	C	C	B	C
Kate Sullivan Elementary School	B	B	B	A	B	B

## Education

### Public Schools:

#### School Grades

Trend: Between 2010 and 2015, more than half of all public schools in Leon County earned a grade of A or B.

<b>School Name</b>	<b>2015 Grade</b>	<b>2014 Grade</b>	<b>2013 Grade</b>	<b>2012 Grade</b>	<b>2011 Grade</b>	<b>2010 Grade</b>
Killearn Lakes Elementary School	A	A	A	A	A	A
Lawton Chiles High School	A	A	A	A	A	A
Leon High School	A	B	B	A	B	B
Lillian Ruediger Elementary School	D	C	C	B	C	C
Lincoln High School	A	A	B	A	B	A
Oak Ridge Elementary School	F	C	D	C	B	C
Pineview Elementary School	C	C	C	B	C	A
R. Frank Nims Middle School	D	C	D	D	C	F
Roberts Elementary School	A	A	A	A	B	A
Sabal Palm Elementary School	D	D	C	C	B	B
SAIL	A	A	A	A	A	B
Sealey Elementary School	B	C	B	A	B	B
Springwood Elementary School	C	B	C	C	B	C
Stars Middle School	C	C	C	B	A	C
Swift Creek Middle School	A	A	A	A	A	A
The School of Arts & Sciences	A	A	A	A	A	A
Walter T. Moore Jr. Elementary School	B	B	B	A	B	A
William J. Montford III Middle School	A	A	A	A	A	A
Woodville Elementary School	C	C	C	B	A	B

\*FAMU-DRS and FSU School are public schools sponsored by their respective universities and operated by the State of Florida.

Source: Florida Department of Education

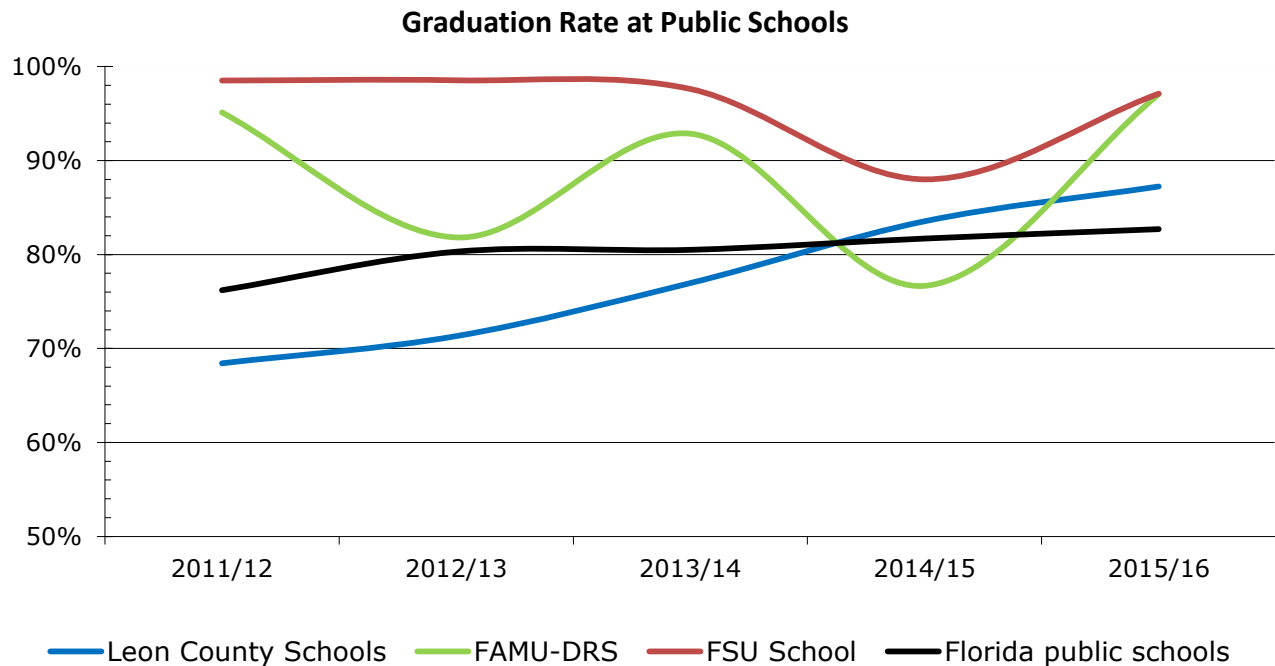
**Public Schools:  
 Graduation Rate**

Trend: The graduation rate for Leon County Schools has surpassed the State rate, while FAMU-DRS and FSU School typically have higher graduation rates than the State's overall rate.

Year	Leon County Schools		FAMU-DRS		FSU School		Florida public schools	
	Graduates	Percent Graduates	Graduates	Percent Graduates	Graduates	Percent Graduates	Graduates	Percent Graduates
2011/12	1,701	68.4%	39	95.1%	133	98.5%	72,945	76.2%
2012/13	1,703	71.3%	27	81.8%	135	98.5%	72,345	80.3%
2013/14	1,577	77.0%	39	92.9%	164	97.6%	72,612	80.5%
2014/15	1,690	83.5%	23	76.7%	132	88.0%	71,349	81.7%
2015/16	1,791	87.2%	33	97.1%	135	97.1%	72,067	82.7%

*Note:* Graduation rate determined as percent of cohort. FAMU-DRS and FSU School are public schools sponsored by their respective universities and operated by the State of Florida.

*Source:* Florida Department of Education

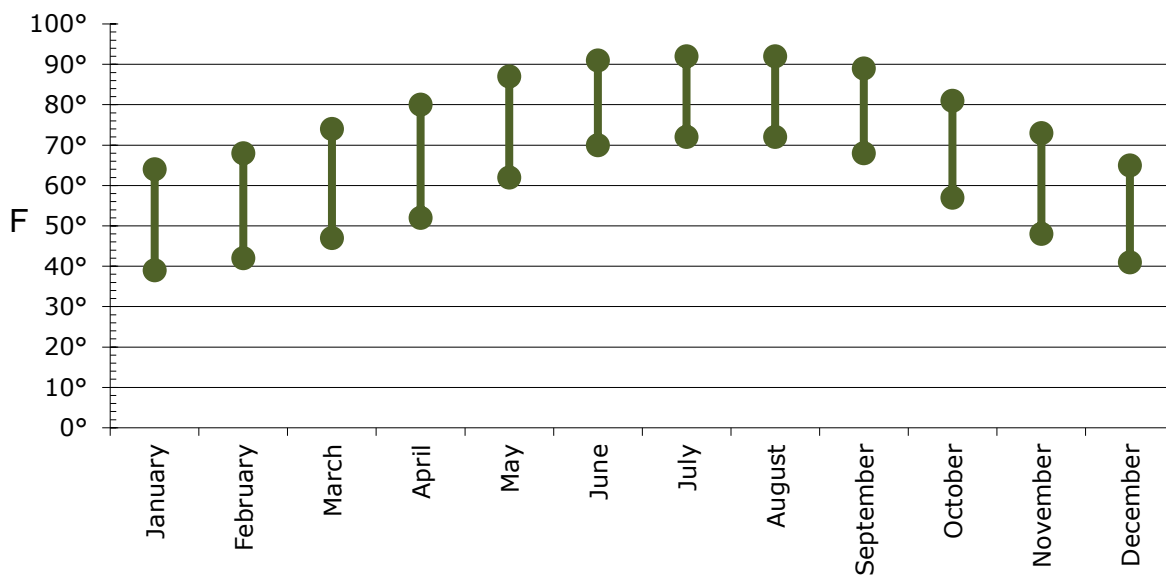


Trend: Tallahassee has a mild, moist climate characteristic of the Gulf States, experiencing a subtropical summer similar to the rest of Florida. In contrast to the Florida peninsula, Northwest Florida of which Tallahassee is a part, experiences four seasons. Prevailing winds average 6.2 miles per hour and are from a southerly direction in the spring and summer, then shift toward a more northerly direction later in the year.

Month	Avg. High Temperature (Fahrenheit) (1981-2010)	Avg. Low Temperature (Fahrenheit) (1981-2010)	Avg. Days Above 90 degrees (Fahrenheit) (1962-2012)	Avg. Days Below 32 degrees (Fahrenheit) (1962-2012)	Avg. Number of Days With Rain (1962-2012)	Avg. Rainfall (Inches) (1981-2010)
January	64	39	0	10	9	4.3
February	68	42	0	7	8	4.9
March	74	47	0	2	8	5.9
April	80	52	1	3	6	3.1
May	87	62	9	0	7	3.5
June	91	70	19	0	12	7.7
July	92	72	23	0	16	7.2
August	92	72	22	0	14	7.4
September	89	68	15	0	8	4.7
October	81	57	2	0	5	3.2
November	73	48	0	3	6	3.5
December	65	41	0	9	8	3.9
<b>Annual</b>	<b>79.5</b>	<b>55.8</b>	<b>91</b>	<b>34</b>	<b>107</b>	<b>59.2</b>

Source: National Climatic Data Center, Comparative Climatic Data, For the United States Through 2012

**Average Daily Low and High Temperatures**



**Public Safety:**

**Leon County Crime Rate**

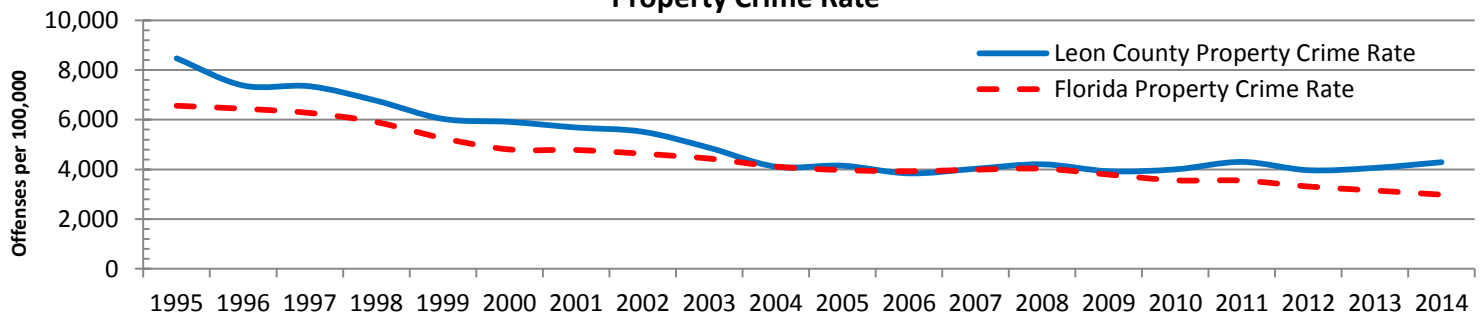
Trend: On a per capita basis, the overall frequency of property and violent crimes in Leon County in the 2010s is lower than during the 2000s, which was down from the prior decade.

Year	Leon County Property Crime Rate	Florida Property Crime Rate	Leon County Violent Crime Rate	Florida Violent Crime Rate
1995	8,469.5	6,561.5	1,191.1	1,061.6
1996	7,376.1	6,441.2	998.1	1,050.2
1997	7,345.6	6,273.1	1,229.6	1,025.0
1998	6,764.9	5,902.7	1,066.3	931.1
1999	6,034.4	5,257.1	1,105.5	841.0
2000	5,913.1	4,803.2	1,054.5	801.1
2001	5,687.8	4,781.9	1,006.1	798.0
2002	5,516.1	4,631.3	846.2	767.1
2003	4,871.2	4,436.5	736.6	727.7
2004	4,112.2	4,114.9	756.4	706.2
2005	4,149.6	3,975.0	781.6	702.2
2006	3,842.2	3,926.2	776.5	705.8
2007	4,026.1	3,989.2	815.7	705.5
2008	4,207.1	4,029.5	839.6	670.3
2009	3,929.0	3,792.7	742.0	604.9
2010	4,002.1	3,561.8	762.6	542.9
2011	4,301.8	3,550.9	735.1	519.3
2012	3,969.1	3,313.2	674.2	492.6
2013	4,061.8	3,151.2	658.5	476.1
2014	4,290.9	2,983.9	758.6	466.8

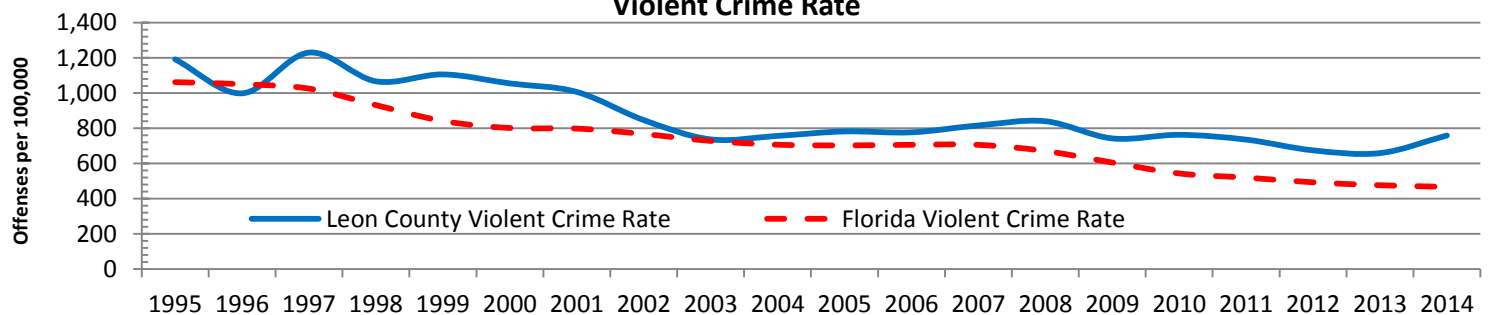
Note: Offenses per 100,000. Property crimes include burglary, larceny, and motor vehicle theft. Violent crimes include murder, forcible sex offenses, robbery, and aggravated assault.

Source: Florida Department of Law Enforcement

**Property Crime Rate**



**Violent Crime Rate**





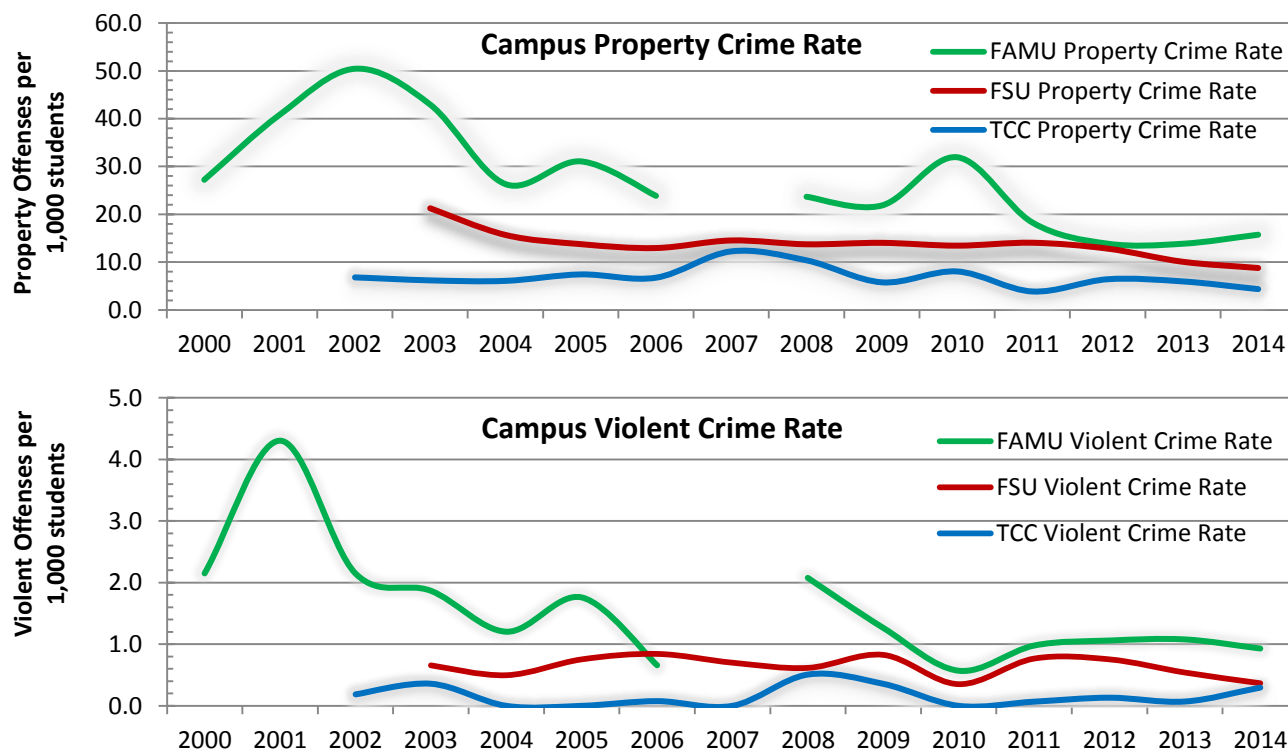
**Campus Crime Rate**

Trend: On a per student basis, the frequency of both violent and property crimes on the campuses of FAMU, FSU, and TCC have been lower in the 2010s than they were in the 2000s.

Year	FAMU Property Crime Rate	FSU Property Crime Rate	TCC Property Crime Rate	FAMU Violent Crime Rate	FSU Violent Crime Rate	TCC Violent Crime Rate
2000	27.2			2.2		
2001	40.8			4.3		
2002	50.4		6.8	2.1		0.2
2003	43.0	21.3	6.2	1.9	0.7	0.4
2004	26.3	15.7	6.1	1.2	0.5	0.0
2005	31.1	13.8	7.4	1.8	0.8	0.0
2006	23.9	13.0	6.8	0.7	0.8	0.1
2007		14.5	12.3		0.7	0.0
2008	23.7	13.7	10.4	2.1	0.6	0.5
2009	21.8	14.0	5.8	1.3	0.8	0.4
2010	31.9	13.4	8.1	0.6	0.4	0.0
2011	18.3	14.1	3.9	1.0	0.8	0.1
2012	13.9	12.8	6.4	1.1	0.8	0.1
2013	13.9	10.1	6.0	1.1	0.5	0.1
2014	15.7	8.8	4.4	0.9	0.4	0.3

Note: Offenses per 1,000 students. Property crimes include burglary, larceny, and motor vehicle theft. Violent crimes include murder, forcible sex offenses, robbery, and aggravated assault.

Source: FBI UCR



## Demographics

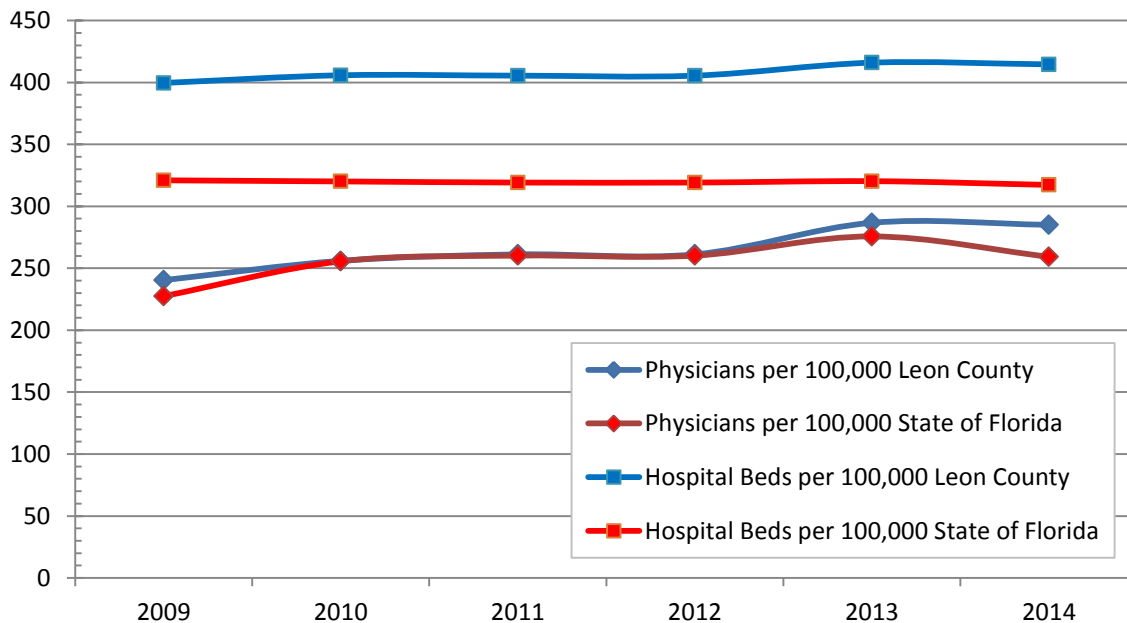
### Community and Environment: Health Resource Availability

Trend: During 2009-2014, availability of hospital beds in Leon County was on average 27% higher than Florida's, and availability of physicians was 3% higher in Leon County than statewide.

Year	Physicians per 100,000		Hospital Beds per 100,000	
	Leon County	State of Florida	Leon County	State of Florida
2009	240.4	227.5	399.6	321
2010	256	255.6	405.8	320.1
2011	261.2	260.2	405.5	319.2
2012	261.2	260.2	405.5	319.2
2013	286.7	275.7	416	320.3
2014	285.1	259.3	414.6	317.3

Source: Florida Department of Health, Division of Medical Quality Assurance, Agency for Health Care Administration. Data for providers are for fiscal year.

**Availability of Physicians and Hospital Beds**





**Commuting:**

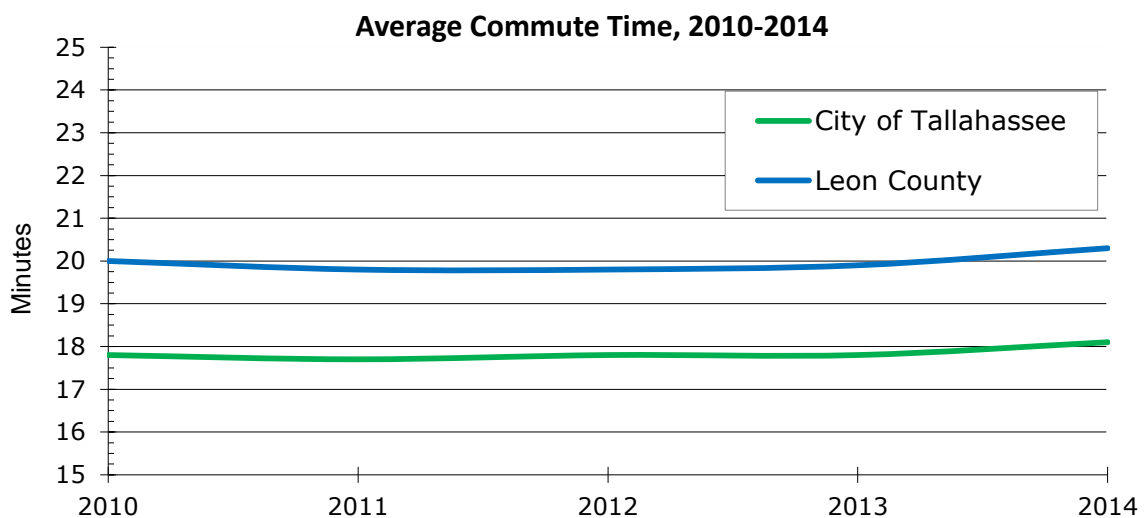
**Mode of Travel and Average Commute Time**

Trend: The average commute time statewide during 2010-2014 was approximately 25.8 minutes. For Leon County, the average was 20.0 minutes, and for the City of Tallahassee it was 17.8 minutes during those years.

	2010		2011		2012		2013		2014	
Means of transportation	City of Tallahassee	Leon County	City of Tallahassee	Leon County	City of Tallahassee	Leon County	City of Tallahassee	Leon County	City of Tallahassee	Leon County
Car, truck, or van	90.6%	91.9%	90.2%	91.7%	89.9%	91.4%	89.9%	91.4%	89.3%	91.0%
Drove alone	80.7%	80.8%	81.3%	81.1%	81.3%	81.4%	82.0%	81.7%	81.3%	81.9%
Carpooled	9.8%	11.2%	9.0%	10.6%	8.6%	10.0%	8.0%	9.6%	8.1%	9.0%
Public transportation	1.9%	1.4%	1.9%	1.5%	2.0%	1.5%	2.2%	1.5%	2.6%	1.8%
Walked	3.2%	2.3%	3.2%	2.3%	3.3%	2.3%	2.9%	2.1%	3.1%	2.2%
Bicycle	0.8%	0.6%	0.8%	0.6%	0.9%	0.6%	1.0%	0.7%	0.8%	0.5%
Other means*	1.2%	1.2%	1.2%	1.1%	1.2%	1.0%	1.1%	0.9%	1.1%	1.0%
Worked at home	2.3%	2.6%	2.6%	2.9%	2.8%	3.2%	2.9%	3.4%	3.0%	3.5%
Average commute time (minutes)	17.8	20.0	17.7	19.8	17.8	19.8	17.8	19.9	18.1	20.3

\*Includes taxi and motorcycle.

Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2010-2014.





## Community and Environment

### Property Tax Rate

Trend: Since 1919 the City of Tallahassee has operated under a Commission-Manager form of government. The Mayor and four Commissioners are elected at-large for staggered four-year terms with elections for two commission seats being held every other year. The City Commission appoints four officers to administer the duties of the city: City Manager, City Treasurer-Clerk, City Auditor, and City Attorney. The County is guided by an elected seven-member Board of County Commissioners, five of whom are elected to serve specific commission districts and two members are elected at-large. Each Commissioner is elected to a four-year term with the position of Chairperson selected annually on a rotating basis. The County Administrator is appointed by the Board to oversee all functions, directives and policies. The County Administrator administers all county offices not governed by elected County officials. Elected County officials include the Sheriff, Property Appraiser, Clerk of the Court, Supervisor of Elections, and Tax Collector.

Taxing Authority	Where Tax is Applied	Millage Rate
Leon County Commission	Anywhere in Leon County	8.31440
Leon County - Emergency Medical Service	Anywhere in Leon County	0.50000
Leon County School Board		
State Law	Anywhere in Leon County	4.94900
Local Board	Anywhere in Leon County	2.24800
Tallahassee City Commission	Within City Limits Only	4.20000
Downtown Improvement Authority	In the Downtown Area Only	1.00000
NW Florida Water Mgmt. District	Anywhere in Leon County	0.03780
<b>Inside City Limits Total</b>		<b>20.24920</b>
<b>Outside City Limits Total</b>		<b>16.04920</b>
<b>Downtown Improvement Area</b>		<b>21.24920</b>

Source: Leon County Property Appraiser



## Community and Environment

### Tallahassee's History of Annexations

#### 1927-2015

Trend: The City of Tallahassee has had a long history of annexation activity as a means of achieving growth. During its first 150 years, Tallahassee expanded from one-quarter of a mile in size to 28.18 square miles by 1980. Since 1980, the City has witnessed a tremendous increase in annexation activity with 75 additional square miles having been added during this time, swelling the size of Tallahassee to 103.31 square miles as of January 1, 2015. Many of the annexations in the early 1980's were accomplished through a double-referendum process that required the approval of City voters. Since 1985 the vast majority of the City's annexations have been achieved through a voluntary process where the owners of properties petition for inclusion into the City.

<b>Year</b>	<b>Beginning Size (Square Miles)</b>	<b>Area Increase (Square Miles)</b>	<b>Ending Size (Square Miles)</b>
1927 - 1959	2.30	12.18	14.48
1960 - 1979	14.48	13.70	28.18
1980 - 1984	28.18	26.79	54.97
1985 - 1989	54.97	7.25	62.22
1990 - 1994	62.22	19.64	81.86
1995 - 1999	81.86	16.35	98.21
2000 - 2004	98.21	3.79	102.00
2005 - 2009	102.00	1.06	103.06
2010 - 2014	103.06	0.25	103.31
2015	103.31	0.00	103.31

Source: City of Tallahassee, Public Works Department, Engineering

## Residential Development:

### Residential Building Permits Issued

Trend: The overall level of residential building permits for new construction issued in Leon County has remained steady over the last three years. There were 535 permits issued for new single-family (detached and attached) homes in 2015, the highest level since 2008, but still well below the historical annual average of 1,249 new single-family construction permits issued per year since 1970 (earliest Planning Department records available). Multi-family new construction permits included the Eclipse on Madison, Stadium Center Block C, and CollegeTown Phase 2.

Year	Detached Single-Family	Attached Single-Family	Multi-Family	Constructed Units Permitted	Mobile Homes*	Total Housing Units Permitted	Total Units Permitted, Yearly % Change
1985	992	97	54	1,143	540	1,683	
1986	1,271	286	280	1,837	661	2,498	48.4%
1987	1,366	375	860	2,601	611	3,212	28.6%
1988	1,439	363	781	2,583	540	3,123	-2.8%
1989	1,743	410	1,261	3,414	658	4,072	30.4%
1990	1,346	393	1,136	2,875	542	3,417	-16.1%
1991	1,215	152	298	1,665	480	2,145	-37.2%
1992	1,359	284	441	2,084	480	2,564	19.5%
1993	1,373	269	381	2,023	530	2,553	-0.4%
1994	1,437	188	476	2,101	556	2,657	4.1%
1995	1,261	302	1,268	2,831	716	3,547	33.5%
1996	1,256	257	441	1,954	584	2,538	-28.4%
1997	1,109	259	837	2,205	649	2,854	12.5%
1998	1,012	166	534	1,712	606	2,318	-18.8%
1999	1,245	162	654	2,061	443	2,504	8.0%
2000	1,154	123	782	2,059	430	2,489	-0.6%
2001	1,127	258	962	2,347	349	2,696	8.3%
2002	1,436	97	1,375	2,908	259	3,167	17.5%
2003	1,456	254	1,197	2,907	306	3,213	1.5%
2004	1,276	184	1,492	2,952	239	3,191	-0.7%
2005	1,552	392	1,411	3,355	152	3,507	9.9%
2006	926	354	659	1,939	132	2,071	-40.9%
2007	756	357	1,041	2,154	175	2,329	12.5%
2008	425	124	267	816	113	929	-60.1%
2009	326	47	327	700	92	792	-14.7%
2010	300	101	27	428	90	518	-34.6%
2011	268	80	553	901	70	971	87.5%
2012	283	44	847	1,174	54	1,228	26.5%
2013	398	64	720	1,182	54	1,236	0.7%
2014	443	39	698	1,180	50	1,230	-0.5%
2015	471	64	250	785	64	849	-31.0%

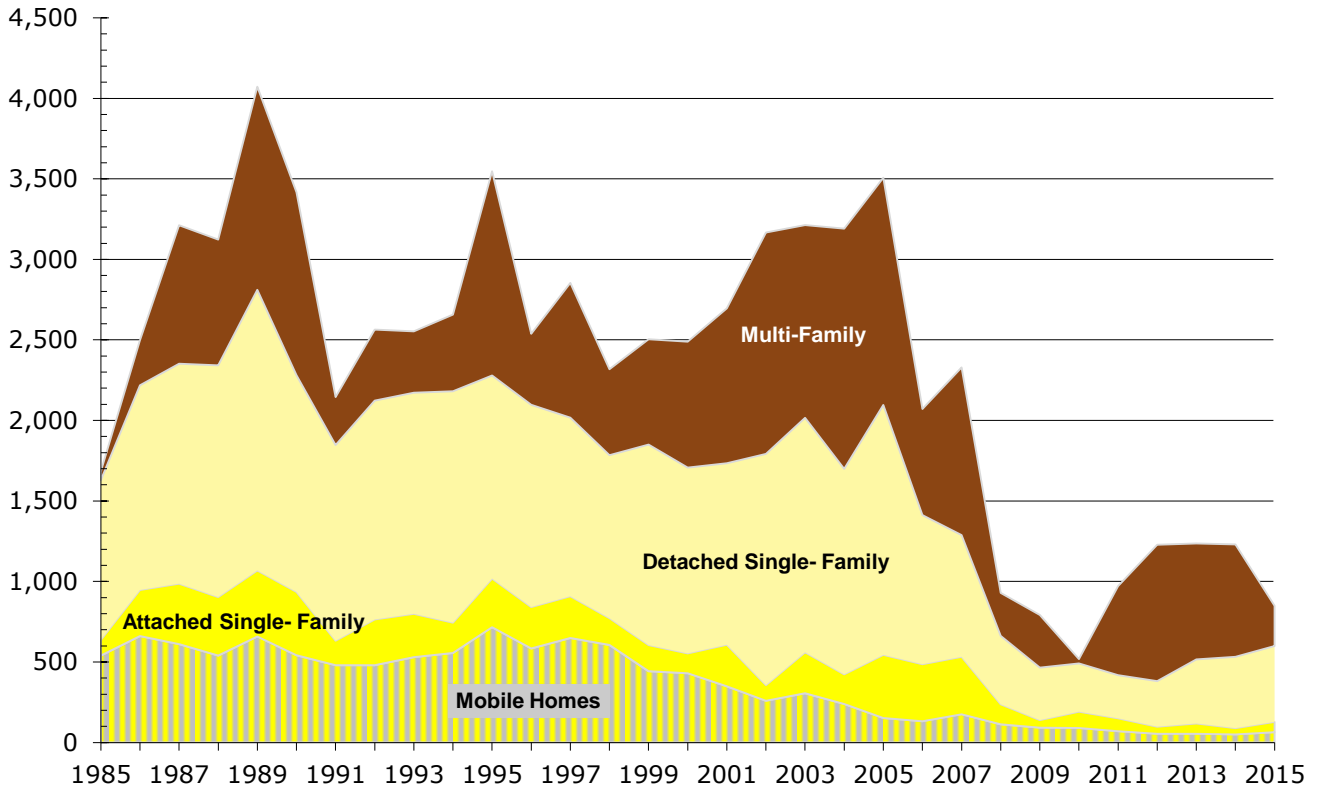
\*Mobile home figures do not include permits issued within mobile home parks

Sources: Permit Enforcement Tracking System, Leon County Department of Development Support & Environmental Management, City of Tallahassee Growth Management Department

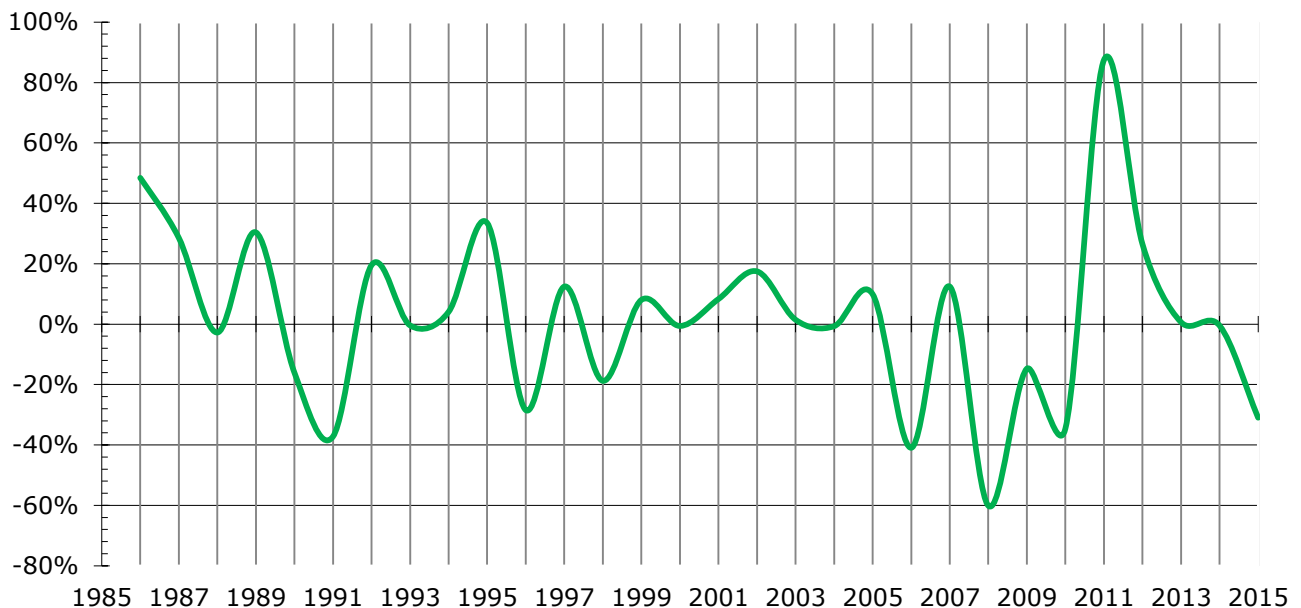
**Residential Development:**

**Residential Building Permits Issued**

**Total Housing Units Permitted**



**Total Housing Units Permitted, Percent Change from Previous Year**



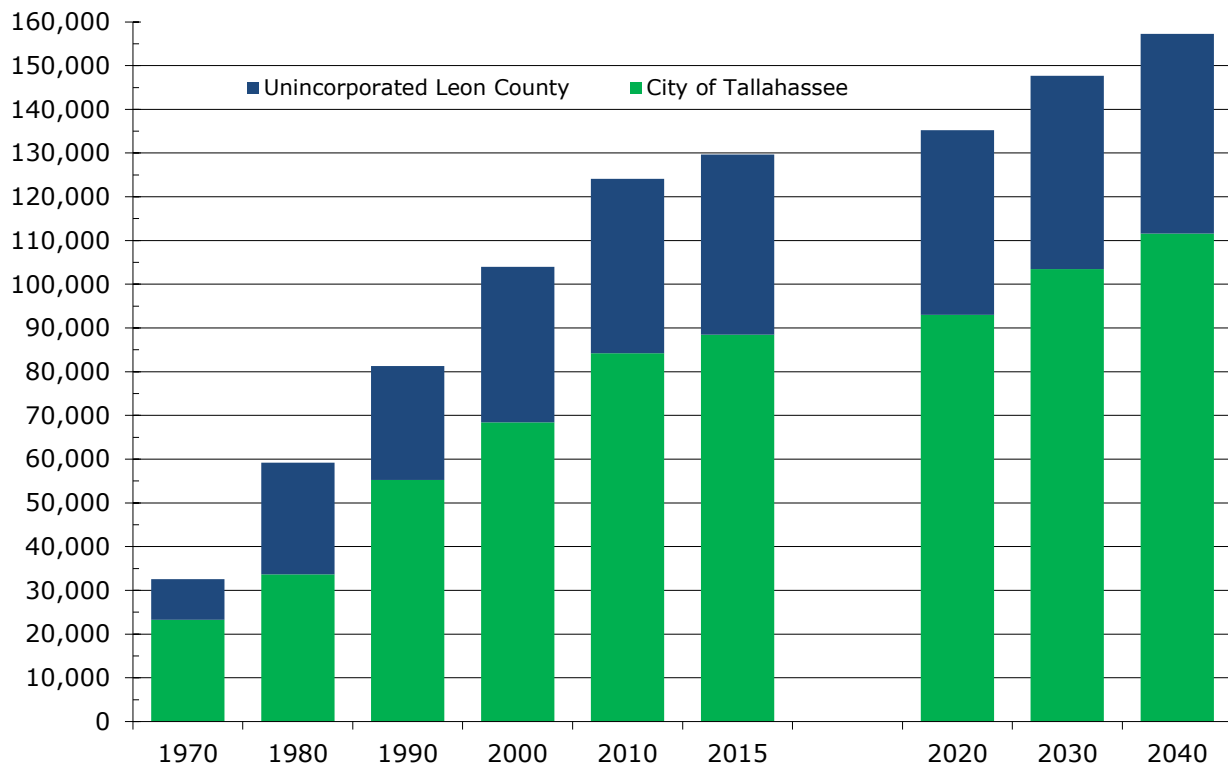


There were an estimated 129,687 residential housing units in Leon County as of 2015, approximately 68% located within the Tallahassee City Limits and 32% in unincorporated Leon County.

Year	City of Tallahassee	Unincorporated Leon County	Total Leon County
1970	23,236	9,337	32,573
1980	33,677	25,543	59,220
1990	55,221	26,104	81,325
2000	68,417	35,557	103,974
2010	84,248	39,888	124,136
2015	88,458	41,229	129,687
2020	93,001	42,202	135,203
2030	103,481	44,200	147,681
2040	111,565	45,730	157,295

Sources: U.S. Department of Commerce, Bureau of the Census (1970-2010), Tallahassee-Leon County Planning Department Estimates and Projections (2015-2040)

**Leon County Housing Unit Inventory, 1970-2040**



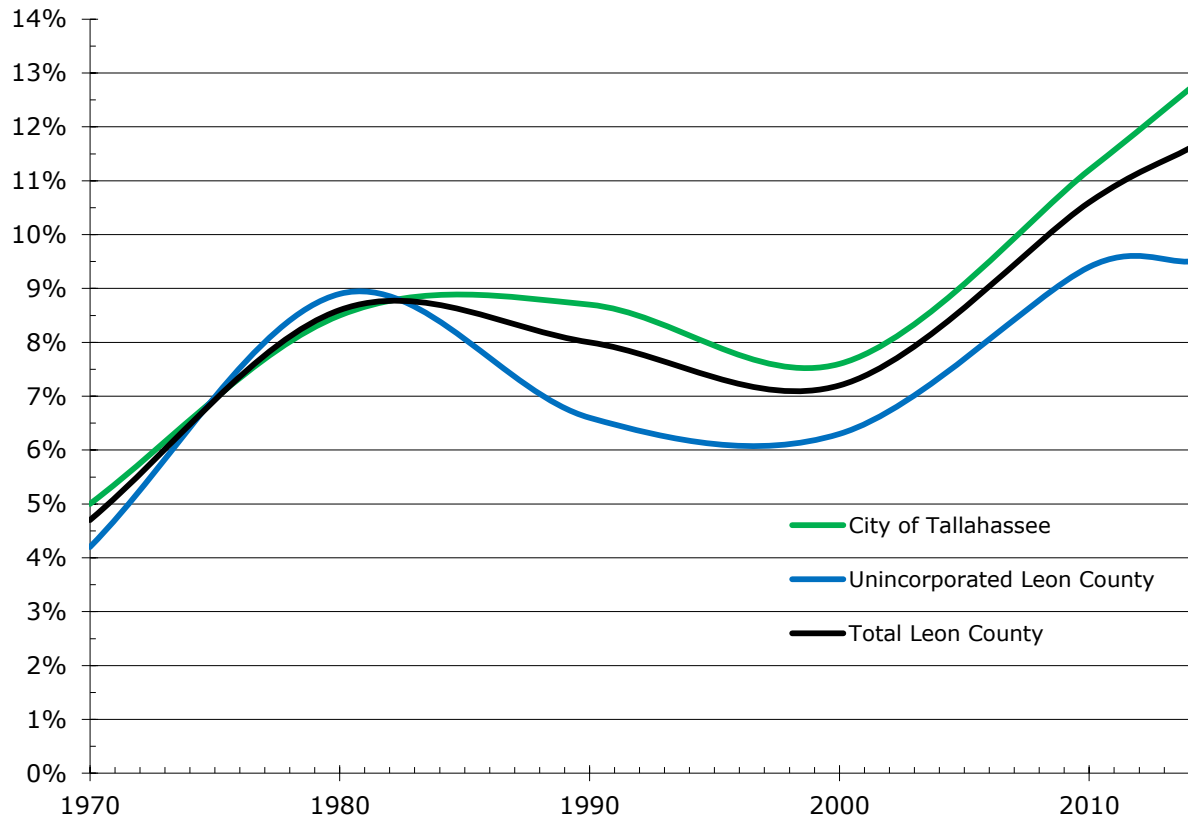
**Residential Vacancy Rates**

Trend: Residential vacancy rates generally increased throughout the 1970s, fell in the 1980s and 1990s, and increased in the 2000s.

Year	City of Tallahassee	Unincorporated Leon County	Total Leon County
1970	5.0%	4.2%	4.7%
1980	8.5%	8.9%	8.6%
1990	8.7%	6.6%	8.0%
2000	7.6%	6.3%	7.2%
2010	11.2%	9.4%	10.6%
2014	12.7%	9.5%	11.6%

Source: U.S. Department of Commerce, Bureau of the Census, Decennial Census, American Community Survey, 2010-2014.

**Residential Vacancy Rates**



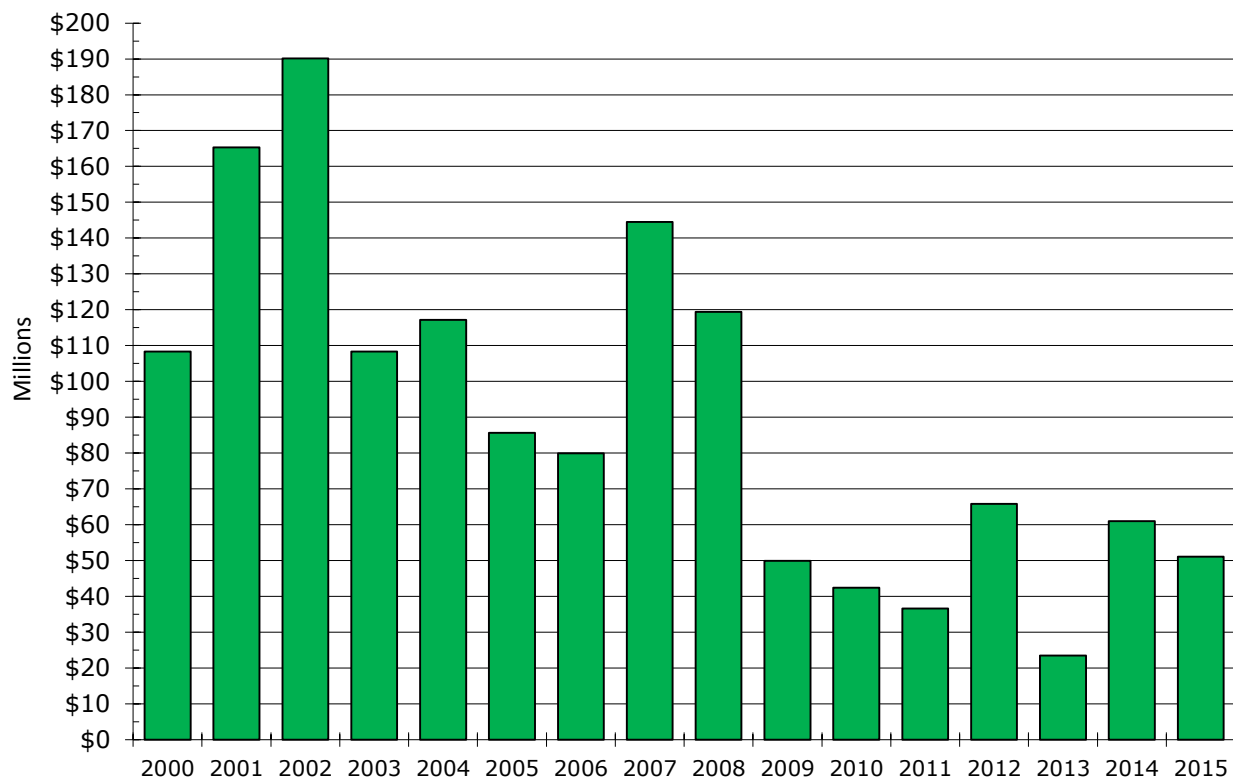
**Commercial Building Permits Issued**

Trend: The value of commercial permits issued for new construction in 2015 was down slightly in comparison with 2014 but still slightly higher than recent historical averages.

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2015 Dollars (\$Millions)
2000	119	\$78.7	\$108.3
2001	140	\$123.5	\$165.3
2002	129	\$144.3	\$190.1
2003	104	\$84.1	\$108.3
2004	106	\$93.4	\$117.2
2005	98	\$70.5	\$85.6
2006	109	\$68.0	\$79.9
2007	83	\$126.4	\$144.5
2008	88	\$108.5	\$119.4
2009	48	\$45.2	\$49.9
2010	30	\$39.0	\$42.4
2011	26	\$34.7	\$36.6
2012	54	\$63.7	\$65.8
2013	25	\$23.1	\$23.5
2014	39	\$60.9	\$61.0
2015	40	\$51.1	\$51.1

*Note: For the purposes of this comparison, the valuation of permits to construct new public facilities are not included in these totals.*

**Value of Commercial Permits Issued in Leon County in 2015 dollars**





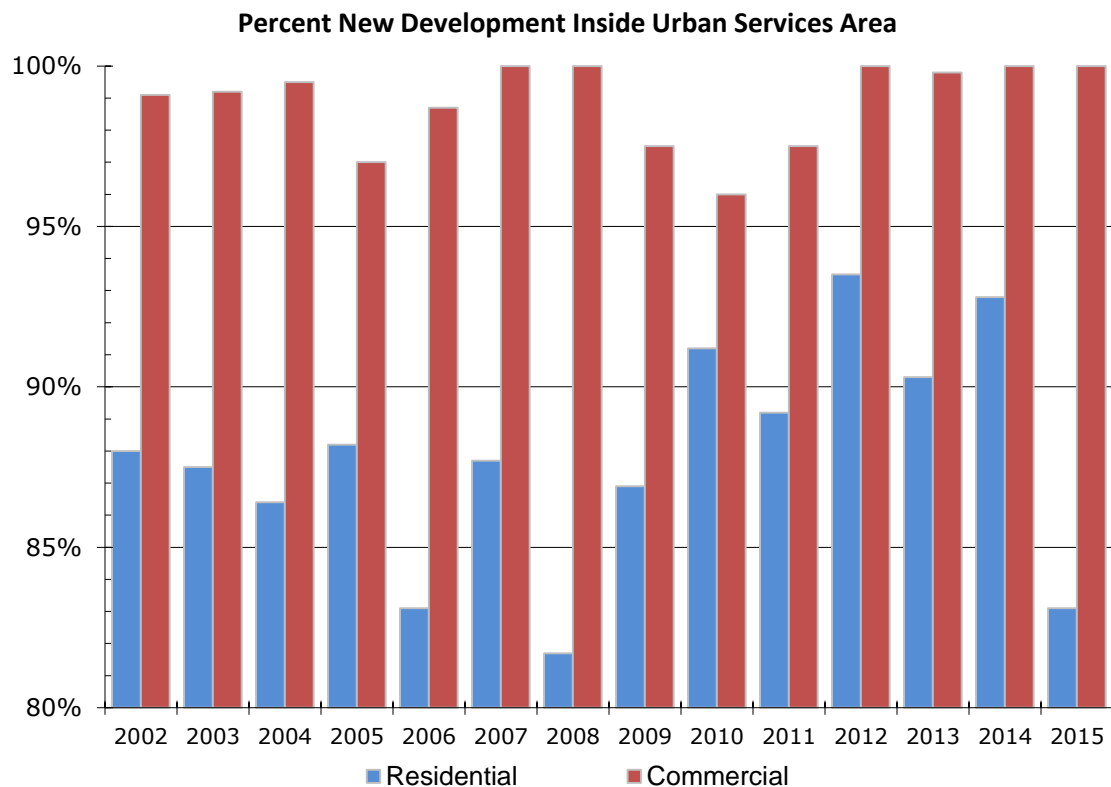
**Urban Service Area Development**

Trend: The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA). The location and size of the USA is based upon the area necessary to accommodate 90% of new residential dwelling units within the County by the Plan Horizon.

Year	Residential	Commercial
2002	88.0%	99.1%
2003	87.5%	99.2%
2004	86.4%	99.5%
2005	88.2%	97.0%
2006	83.1%	98.7%
2007	87.7%	100.0%
2008	81.7%	100.0%
2009	86.9%	97.5%
2010	91.2%	96.0%
2011	89.2%	97.5%
2012	93.5%	100.0%
2013	90.3%	99.8%
2014	92.8%	100.0%
2015	83.1%	100.0%

Note: Residential Development measured in units constructed, commercial development, sq. ft. constructed. Mobile home units permitted within mobile home parks are not included in residential unit totals.

Sources: Permit Enforcement Tracking System, Leon County Department of Development Support & Environmental Management, City of Tallahassee Growth Management Department





## Residential and Commercial Development

### Office Market Survey

#### Asking Rents

The total Tallahassee/Leon County office market consists of approximately seven million square feet of privately owned office space. In addition, the State of Florida owns and occupies approximately 4.5 million square feet.

Market	Asking Rents*	
	From	To
Downtown**	\$16.00	\$29.50
Northeast	\$15.00	\$24.00
Northwest/West	\$8.00	\$18.00
Southeast	\$8.00	\$19.50
<b>Total</b>	<b>\$8.00</b>	<b>\$29.50</b>

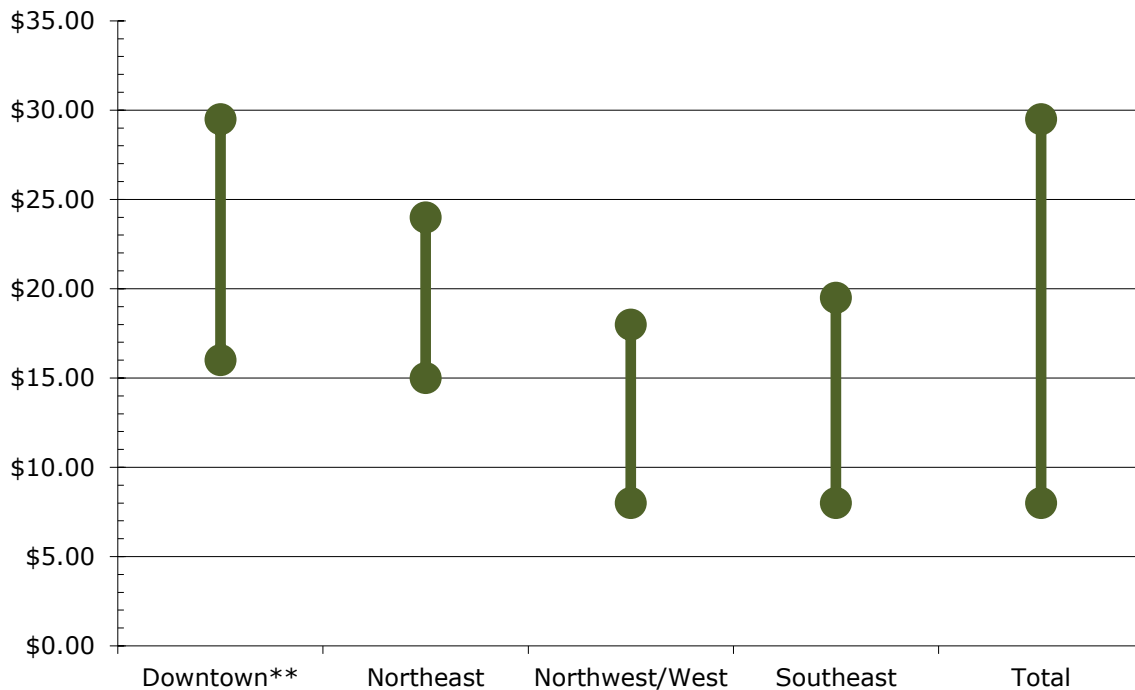
\*All rents adjusted to full service (operating expenses include utilities and janitorial).

\*\*Downtown CBD (Central Business District)

Note: Survey consists of buildings 10,000 sq. ft. and larger.

Source: Chip Hartung, Coldwell Banker Hartung and Noblin, Inc.

Office Market Survey, Asking Rents, Year-End 2015



## Residential and Commercial Development

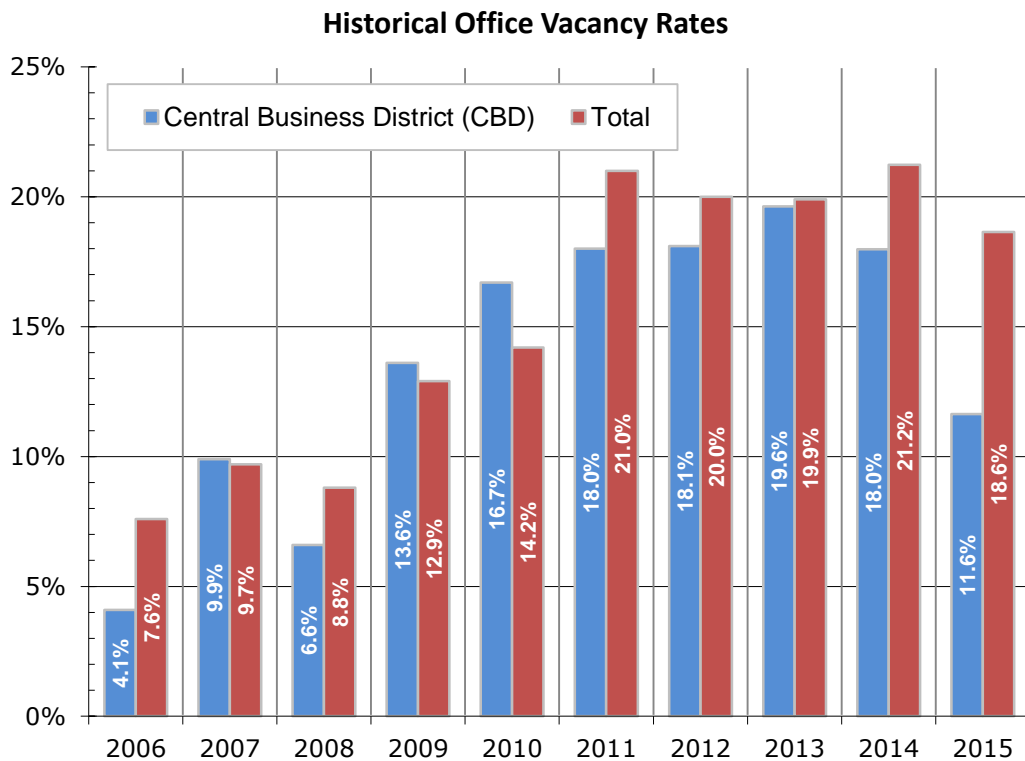
### Historical Office Vacancy Rates

Trend: The overall office vacancy rate in Leon County fell to 18.6% for year-end 2015, down from 21.2% in year-end 2014 with the greatest declines occurring in both the downtown and northeast. The vacancy rate for Class A space continues to improve as well, declining from 7.4% at the end of 2014 to 6.3% at the end of 2015. For the first time in seven years, year-end 2015 vacancy rates improved in all submarkets.

Year	Central Business District (CBD)	Total
2006	4.1%	7.6%
2007	9.9%	9.7%
2008	6.6%	8.8%
2009	13.6%	12.9%
2010	16.7%	14.2%
2011	18.0%	21.0%
2012	18.1%	20.0%
2013	19.6%	19.9%
2014	18.0%	21.2%
2015	11.6%	18.6%

Note: Data for years 2004-2009 represent first quarter data, 2010-2015 represent end-of-year data.

Source: Chip Hartung, Coldwell Banker Hartung and Noblin, Inc.



## Residential and Commercial Development

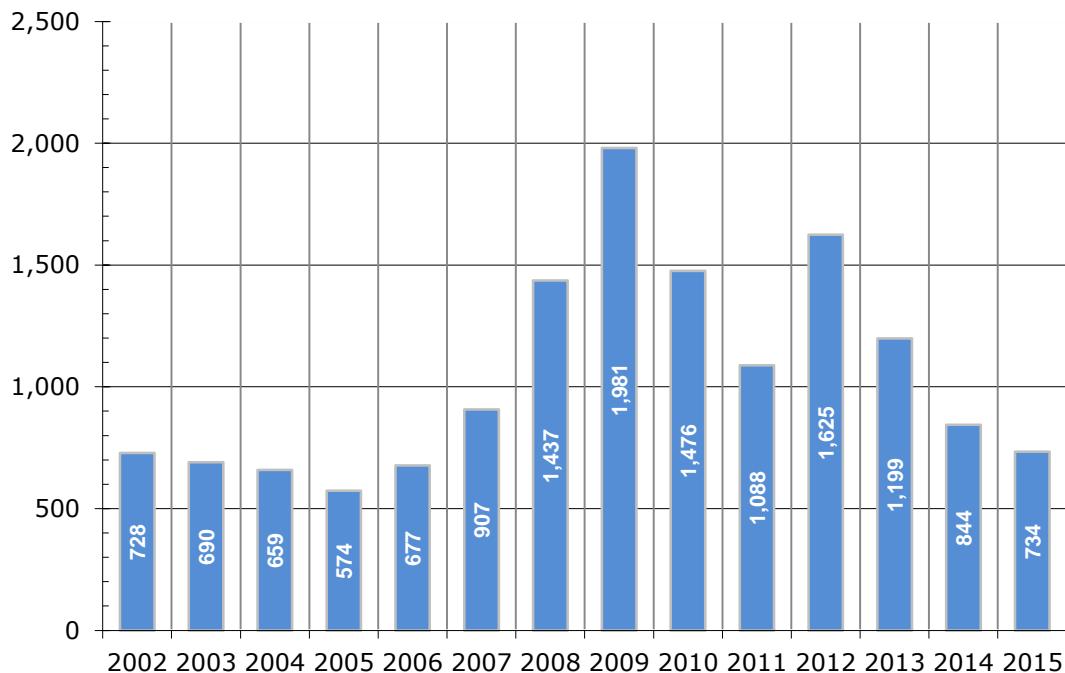
### Mortgage Foreclosure Cases

Mortgage foreclosure cases decreased 13.0% in 2015 when compared to 2014. There were 734 mortgage foreclosure cases in Leon County in 2015 according to the Leon County Clerk of Courts.

Year	Foreclosure Cases	Change Over Previous Year
2002	728	-
2003	690	-5.2%
2004	659	-4.5%
2005	574	-12.9%
2006	677	17.9%
2007	907	34.0%
2008	1,437	58.4%
2009	1,981	37.9%
2010	1,476	-25.5%
2011	1,088	-26.3%
2012	1,625	49.4%
2013	1,199	-26.2%
2014	844	-29.6%
2015	734	-13.0%

Source: Leon County Clerk of Courts

### Leon County Mortgage Foreclosure Cases



## Economic Factors

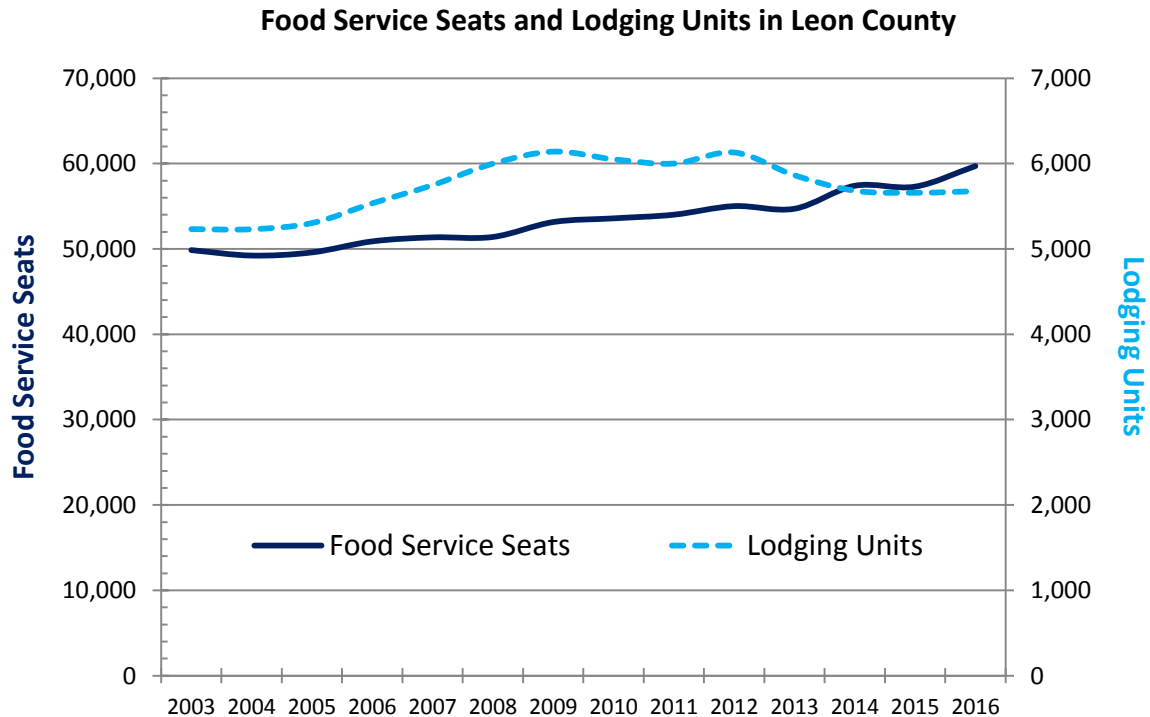
### Residential and Commercial Development: Food Service and Lodging Facilities

Trend: Between 2003 and 2016, the total number of restaurant seats available in Leon County increased nearly 20%, while hotel and motel rooms and units available increased by around 8½%.

Year	Food Service		Lodging	
	Establishments*	Seats	Hotels & Motels	Units
2003	496	49,860	59	5,232
2004	488	49,221	59	5,231
2005	493	49,592	59	5,303
2006	519	50,884	61	5,534
2007	517	51,354	64	5,747
2008	518	51,400	65	5,999
2009	535	53,146	67	6,140
2010	554	53,580	67	6,050
2011	560	54,010	66	6,000
2012	579	55,016	67	6,130
2013	600	54,705	65	5,863
2014	612	57,401	63	5,682
2015	622	57,297	62	5,658
2016	644	59,704	62	5,676

\*Does not include non-seating establishments, catering, mobile food dispensing vehicles, or hot dog carts.

Source: Florida Department of Business and Professional Regulation



## Economic Factors

### Innovation:

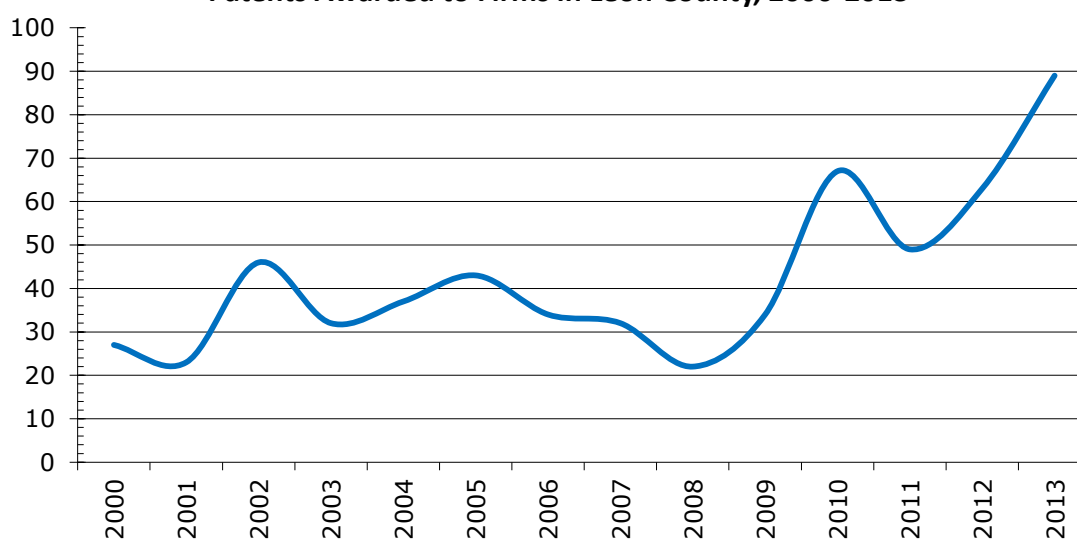
### Patents Awarded in Leon County

Trend: The average annual number of patents awarded in Leon County during 2009-2013 was 60, up 80% from an annual average of 33 during 2000-2008.

Year	Leon County	State of Florida	Leon County as Percent of Florida Patents
2000	27	2,611	1.0%
2001	23	2,654	0.9%
2002	46	2,406	1.9%
2003	32	2,567	1.2%
2004	37	2,462	1.5%
2005	43	2,295	1.9%
2006	34	2,605	1.3%
2007	32	2,362	1.4%
2008	22	2,051	1.1%
2009	34	2,202	1.5%
2010	67	2,980	2.2%
2011	49	3,141	1.6%
2012	63	3,694	1.7%
2013	89	3,958	2.2%
2000-2013	598	37,988	1.6%

Source: U.S. Patent and Trademark Office, Calendar Year Patent Statistics

**Patents Awarded to Firms in Leon County, 2000-2013**



## Economic Factors

### Innovation:

#### SBIR/STTR Grants

Trend: Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) are federal programs encouraging domestic small businesses to engage in research and development with potential for commercialization. Through competitive awards, SBIR and STTR help small businesses explore their technological potential and give incentive to profit from commercialization. Since 2000, Leon County firms and institutions have been awarded over \$5.4 million, with 53% coming from the Department of Energy and the Department of Health and Human Services.

Year	Cumulative Award Amount
2000	\$572,400
2001	\$1,127,542
2002	\$1,457,271
2003	\$2,746,432
2004	\$3,730,665
2005	\$4,030,657
2006	\$4,117,315
2007	\$4,217,315
2008	\$4,479,341
2009	\$5,036,707
2010	\$5,186,701
2011	\$5,186,701
2012	\$5,186,701
2013	\$5,186,701
2014	\$5,186,701
2015	\$5,186,701
2016	\$5,411,700

Awarding Agency	Percent Awards, 2000-2016
Department of Commerce	6.9%
Department of Defense	17.4%
Department of Energy	26.7%
Department of Health and Human Services	26.3%
Department of Transportation	1.8%
National Aeronautics and Space Administration	10.3%
National Science Foundation	10.6%

Source: Small Business Innovation Research

**Cumulative SBBR/STTR Grant Awards, 2000-2016**

