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DATA DIGEST 2018

CONTENTS

Demographics

Population Estimates and Projections (Leon County).....	1
Age and Sex (Leon County).....	2
Race and Ethnicity (Leon County).....	3
Components of Population Change (Leon County)	4
Growth by Age Group (Leon County)	5
Tallahassee MSA Population by Age and Sex	6
Population Growth by Metropolitan Area.....	7
Household Characteristics.....	9
Licensed Drivers in Leon County	10
Origins of FSU and FAMU Students.....	12

Workforce and Income

Employment	13
Unemployment Rate (Annual Average)	14
Initial Claims for Unemployment Compensation.....	16
Average Annual Employment & Wages by Ownership.....	17
Average Annual Employment & Wages of Private Industries.....	18
Median Family Income	19
Educational Attainment	20
Employment by Industry (Non-Agricultural)	21
Fastest Growing Occupations.....	22
Occupations Gaining the Most New Jobs	23
Fastest Growing Industries.....	24
Per Capita Personal Income.....	25
Labor Force	26
Job Creation and Destruction in Tallahassee MSA.....	27
Occupational Employment and Wages.....	29
Major Employers	31
Professional Engineers in Tallahassee MSA	33
Certified Public Accountants in Tallahassee MSA	34

Economic Factors

Gross Domestic Product by Metro. Area	35
Productivity (GDP per Employee).....	36
Exports from Tallahassee MSA.....	38
Tallahassee Regional Airport Traffic Statistics.....	39
Leon County Tourism.....	40
Annual Taxable Sales, Change from Previous Year	41
Annual Taxable Sales, by Category.....	42
Consumer Price Index (CPI-U).....	43

FDIC Summary of Deposits.....	44
Cost of Living Index	45
Florida Price Level Index	46
Regional Price Parities for Tallahassee MSA	47
Total Quantity Indexes for Real GDP	48
Homestead Exemption in Leon County	49

Education

Higher Education Institutions: Enrollment	51
Higher Education Institutions: Enrollment by Level and Full-Time Status	52
Higher Education: Degrees Conferred	54
Public School Enrollment.....	55
Public School Graduation Rate	56
Leon County Public School Grades.....	57
Higher Education: Graduation Rate	59
Financial Aid Received by Undergraduate Students	60
Tallahassee MSA Contributions from Florida Lottery	61

Community and Environment

Electric Service Points	63
Health Resource Availability	64
Crime Index for Tallahassee MSA	65
Public Safety: Leon County Crime Rate	67
Public Safety: Campus Crime Rate	68
Property Tax Rate	69
Tallahassee's History of Annexations	70
Climatic Data	71
Agriculture in Tallahassee MSA.....	72
Homeownership Rate in Tallahassee MSA	73
Motor Vehicle Crashes in Leon County.....	74
Vehicle Registrations in Leon County	75

Residential and Commercial Development

Residential Development	76
Mortgage Foreclosure Cases.....	78
Single Family Home Sales and Median Price.....	79
Urban Service Area Development.....	80
Food Service and Lodging Facilities.....	81
Commercial Development.....	82
Historical Office Vacancy Rates	83
Office Market Survey	84
Housing Unit Inventory.....	85
Residential Vacancy Rates	86
Housing Units Authorized in Tallahassee MSA.....	87
Market Statistics for Tallahassee Metro Area	88
New Elevators in Leon County	89

Innovation/Entrepreneurism

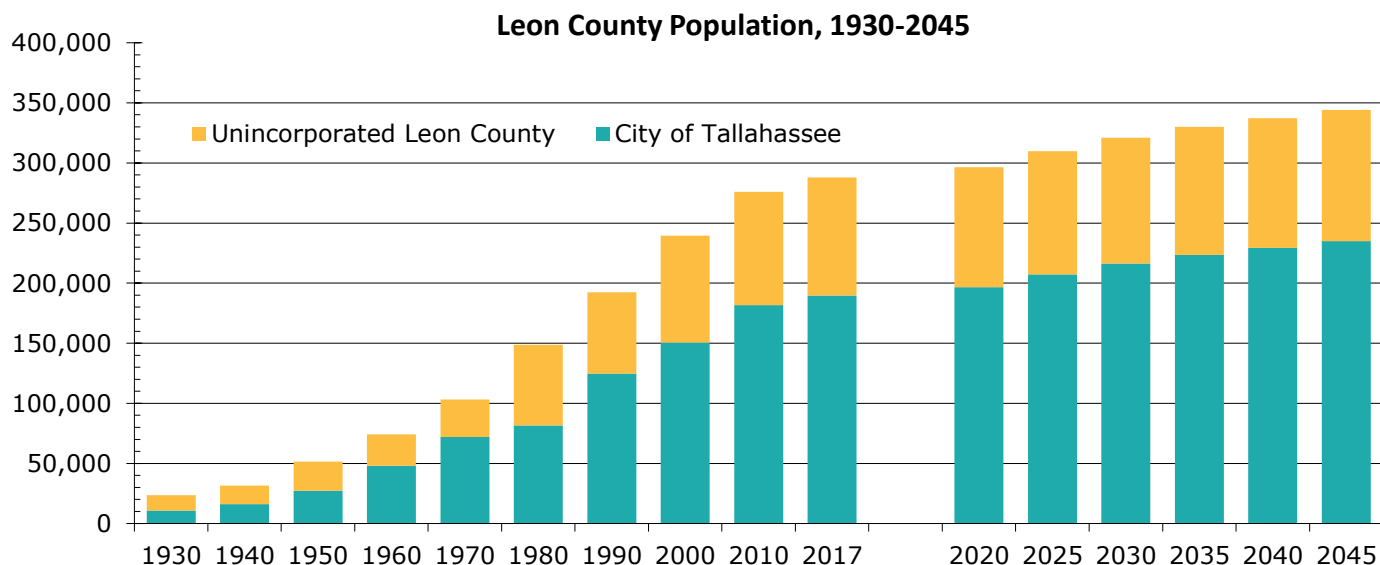
Nonemployer Statistics for Tallahassee MSA	90
SBIR/STTR Grants	91
Patents Awarded in Leon County & Tallahassee MSA	92
Total R&D Expenditures at FAMU & FSU	93



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	275,487
2017	189,625	98,274	287,899
2020	196,600	100,000	296,600
2025	207,300	102,600	309,900
2030	216,200	104,700	320,900
2035	223,500	106,500	330,000
2040	229,400	107,900	337,300
2045	234,900	109,200	344,100

Sources: University of Florida, Bureau of Economic and Business Research (2020-2045 Leon County projections); Tallahassee-Leon County Office of Economic Vitality (City of Tallahassee and Unincorporated Leon County 2020-2045) projections assuming continued annexations and share of population growth captured by the City between 2000 and 2017 will continue throughout the projected time horizon).



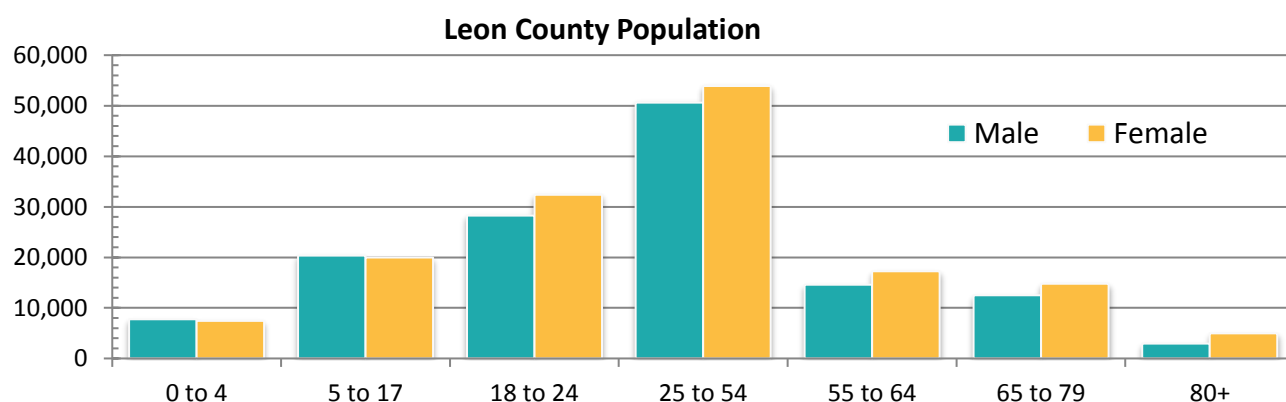


Demographics

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	15,187	5.3%	7,442	2.6%	7,745	2.7%
5 to 17	40,314	14.0%	19,983	6.9%	20,331	7.1%
18 to 24	60,692	21.1%	32,407	11.3%	28,285	9.8%
25 to 54	104,468	36.3%	53,883	18.7%	50,585	17.6%
55 to 64	31,834	11.1%	17,259	6.0%	14,575	5.1%
65 to 79	27,260	9.5%	14,762	5.1%	12,498	4.3%
80+	7,916	2.8%	4,969	1.7%	2,947	1.0%
Total	287,671	100.0%	150,705	52.4%	136,966	47.6%



Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 178", June 2017

Demographics

Population: Race and Ethnicity

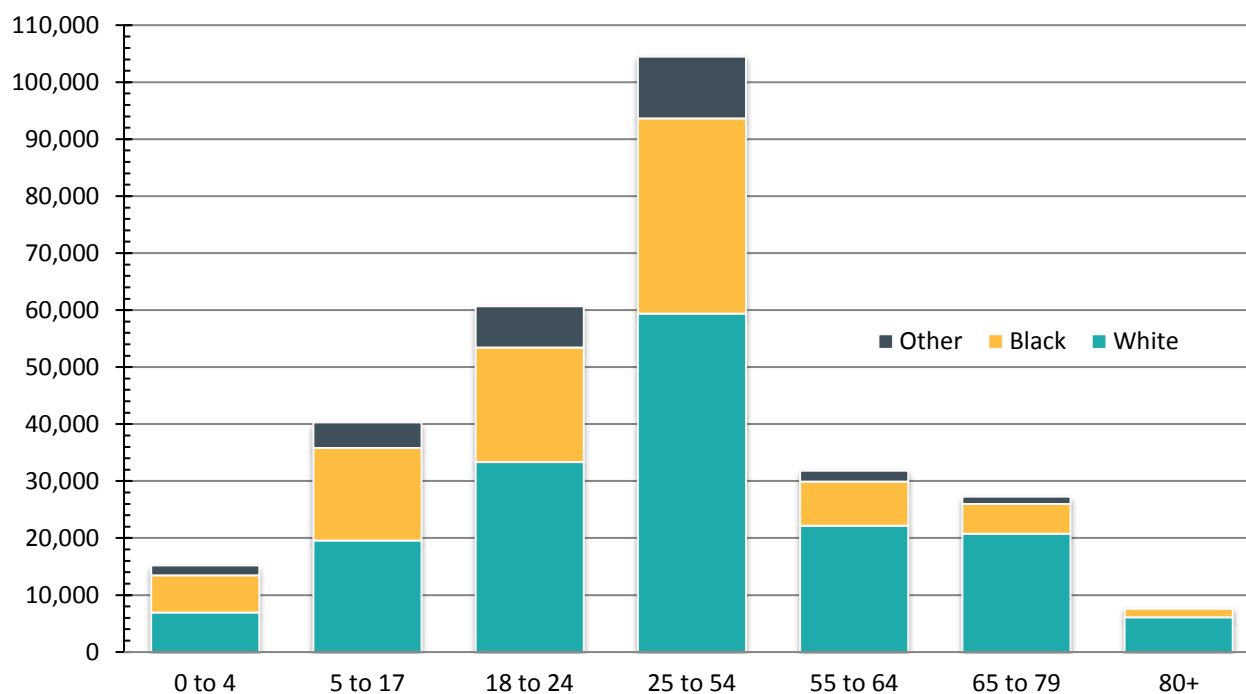
Trend: By race and ethnicity, Leon County's population includes 58.5% White, 31.8% Black, and 9.7% Other Races. Also, 6.1% of Leon County residents are of Hispanic origin.

Age Group	All Races	White	Black	Other	Hispanic Origin*
0 to 4	15,187	6,961	6,506	1,720	1,026
5 to 17	40,314	19,558	16,231	4,525	2,893
18 to 24	60,692	33,354	20,068	7,270	5,417
25 to 54	104,468	59,414	34,239	10,815	6,146
55 to 64	31,834	22,176	7,752	1,906	1,057
65 to 79	27,260	20,765	5,187	1,308	757
80+	7,916	6,127	1,496	293	194
Total	287,671	168,355	91,479	27,837	17,490

*"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 178, June 2017

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, 73.4% of Leon County's population growth is attributable to net natural increase (total births less total deaths).

	Leon County	Tallahassee MSA	State of Florida
Total Population Change (2010-2017)	12,412	15,269	1,682,810
Net Natural Increase	9,111	10,216	250,110
Births	21,280	28,489	1,525,100
Deaths	12,169	18,273	1,274,990
Net Migration	3,301	5,053	1,432,700
Percent due to Natural Increase	73.4%	66.9%	14.9%
Percent due to Net Migration	26.6%	33.1%	85.1%

Source: University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2017

Demographics

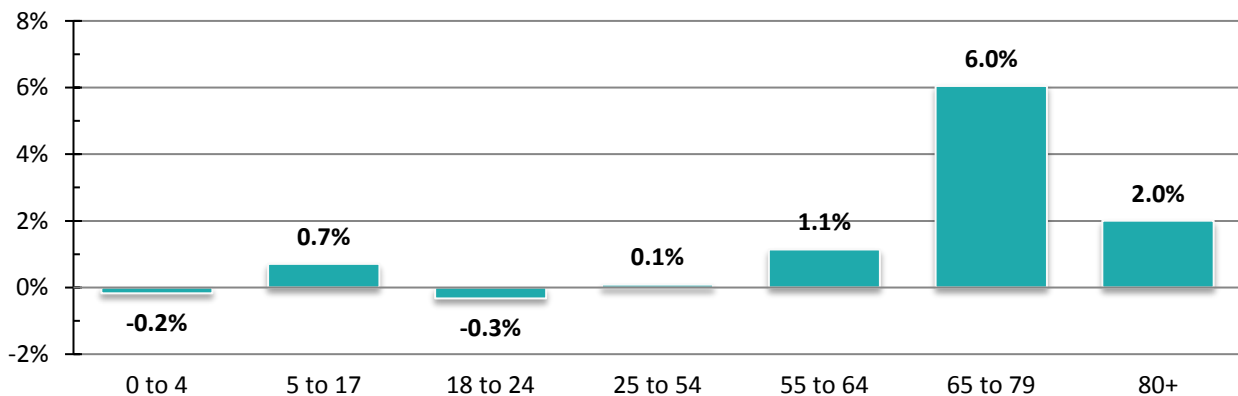
Population:

Growth by Age Group

Trend: Although the 65-79 age group represents 9.5% of Leon County's total population, it is the fastest growing age group, growing at an annual rate of 6% per year during 2010-2016.

Age Group	2010 Population	2016 Population Estimate	Growth in Population 2010-2016	Percent Growth 2010-2016	Avg. Ann. Growth 2010- 2016
0 to 4	15,350	15,187	-163	-1.1%	-0.2%
5 to 17	38,623	40,314	1,691	4.3%	0.7%
18 to 24	61,897	60,692	-1,205	-2.0%	-0.3%
25 to 54	103,907	104,468	561	0.5%	0.1%
55 to 64	29,730	31,834	2,104	6.8%	1.1%
65 to 79	18,962	27,260	8,298	36.3%	6.0%
80+	7,018	7,916	898	12.0%	2.0%
Total	275,487	284,443	8,956	3.2%	0.5%

Age Group Average Annual Growth, 2010-2016



Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 178", June 2017



Demographics

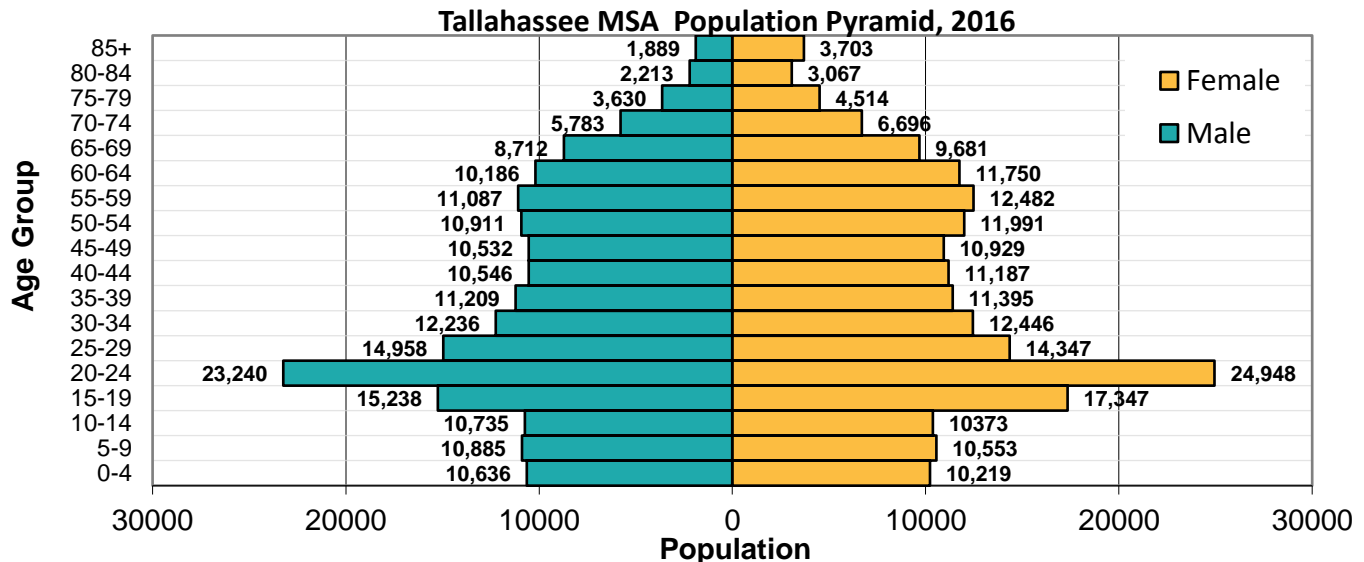
Population:

Tallahassee MSA by Age and Sex

Trend: Among the four counties of the Tallahassee MSA, the population of prime working age (25 to 64) accounts for 49% of the population; minors and college-age (under 24), 38%; and those 65 and older, 13%.

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	20,855	5.5%	10,219	2.7%	10,636	2.8%
5 to 9	21,438	5.6%	10,553	2.8%	10,885	2.8%
10 to 14	21,108	5.5%	17,347	4.5%	10,735	2.8%
15 to 19	32,585	8.5%	10,373	2.7%	15,238	4.0%
20 to 24	48,188	12.6%	24,948	6.5%	23,240	6.1%
25 to 29	29,305	7.7%	14,347	3.8%	14,958	3.9%
30 to 34	24,682	6.5%	12,446	3.3%	12,236	3.2%
35 to 39	22,604	5.9%	11,395	3.0%	11,209	2.9%
40 to 44	21,733	5.7%	11,187	2.9%	10,546	2.8%
45 to 49	21,461	5.6%	10,929	2.9%	10,532	2.8%
50 to 54	22,902	6.0%	11,991	3.1%	10,911	2.9%
55 to 59	23,569	6.2%	12,482	3.3%	11,087	2.9%
60 to 64	21,936	5.7%	11,750	3.1%	10,186	2.7%
65 to 69	18,393	4.8%	9,681	2.5%	8,712	2.3%
70 to 74	12,479	3.3%	6,696	1.8%	5,783	1.5%
75 to 79	8,144	2.1%	4,514	1.2%	3,630	0.9%
80 to 84	5,280	1.4%	3,067	0.8%	2,213	0.6%
85+	5,592	1.5%	3,703	1.0%	1,889	0.5%
Total	382,254	100.0%	197,628	51.7%	184,626	48.3%

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 178", June 2017





Demographics

Population:

Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was 382,682 in 2017, up 4% from 2010.

Metropolitan Area/County(ies)	2017 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2000-2010
All Metropolitan Areas	19,766,475	17,689,986	15,023,351	17.7%
Miami-Fort Lauderdale-West Palm Beach (Broward, Miami-Dade, Palm Beach)	6,031,209	5,564,657	5,007,988	11.1%
Tampa-St. Petersburg-Clearwater (Hernando, Hillsborough, Pasco, Pinellas)	3,028,896	2,783,243	2,396,013	16.2%
Orlando-Kissimmee-Sanford (Lake, Orange, Osceola, Seminole)	2,437,975	2,134,411	1,644,563	29.8%
Jacksonville (Baker, Clay, Duval, Nassau, St. Johns)	1,482,722	1,345,596	1,122,750	19.8%
North Port-Sarasota-Bradenton (Manatee, Sarasota)	776,042	702,281	589,963	19.0%
Cape Coral-Fort Myers (Lee)	698,468	618,754	440,888	40.3%
Lakeland-Winter Haven (Polk)	661,645	602,095	483,924	24.4%
Deltona-Daytona Beach-Ormond Beach (Volusia, Flagler)	628,562	590,289	493,175	19.7%
Palm Bay-Melbourne-Titusville (Brevard)	575,211	543,376	476,230	14.1%
Pensacola-Ferry Pass-Brent (Escambia, Santa Rosa)	484,216	448,991	412,153	8.9%
Port St. Lucie (Martin, St. Lucie)	450,656	424,107	319,426	32.8%
Tallahassee (Gadsden, Jefferson, Leon, Wakulla)	382,682	367,413	320,304	14.7%
Ocala (Marion)	349,267	331,298	258,916	28.0%
Naples-Immokalee-Marco Island (Collier)	357,470	321,520	251,377	27.9%
Gainesville (Alachua, Gilchrist)	277,227	264,275	232,392	13.7%
Crestview-Fort Walton Beach-Destin (Okaloosa, Walton)	260,789	235,865	211,099	11.7%
Panama City (Bay)	195,117	184,715	162,777	13.5%



Demographics

Population:

Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was 382,682 in 2017, up 4% from 2010.

Metropolitan Area/County(ies)	2017 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2000-2010
Punta Gorda (Charlotte)	172,720	159,978	141,627	13.0%
Homosassa Springs (Citrus)	143,801	141,236	118,085	19.6%
Sebastian-Vero Beach (Indian River)	148,962	138,028	112,947	22.2%
The Villages (Sumter)	120,700	93,420	53,345	75.1%
Sebring (Highlands)	102,138	98,786	87,366	13.1%

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, 2017



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, 2017		Census April 1, 2010		Census April 1, 2000	
	Households	Average Household Size	Households	Average Household Size	Households	Average Household Size
Leon County	117,030	2.33	110,945	2.35	96,521	2.34
Florida	8,125,176	2.47	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 179", December 2017;
U.S. Department of Commerce, Bureau of the Census, Census 2010

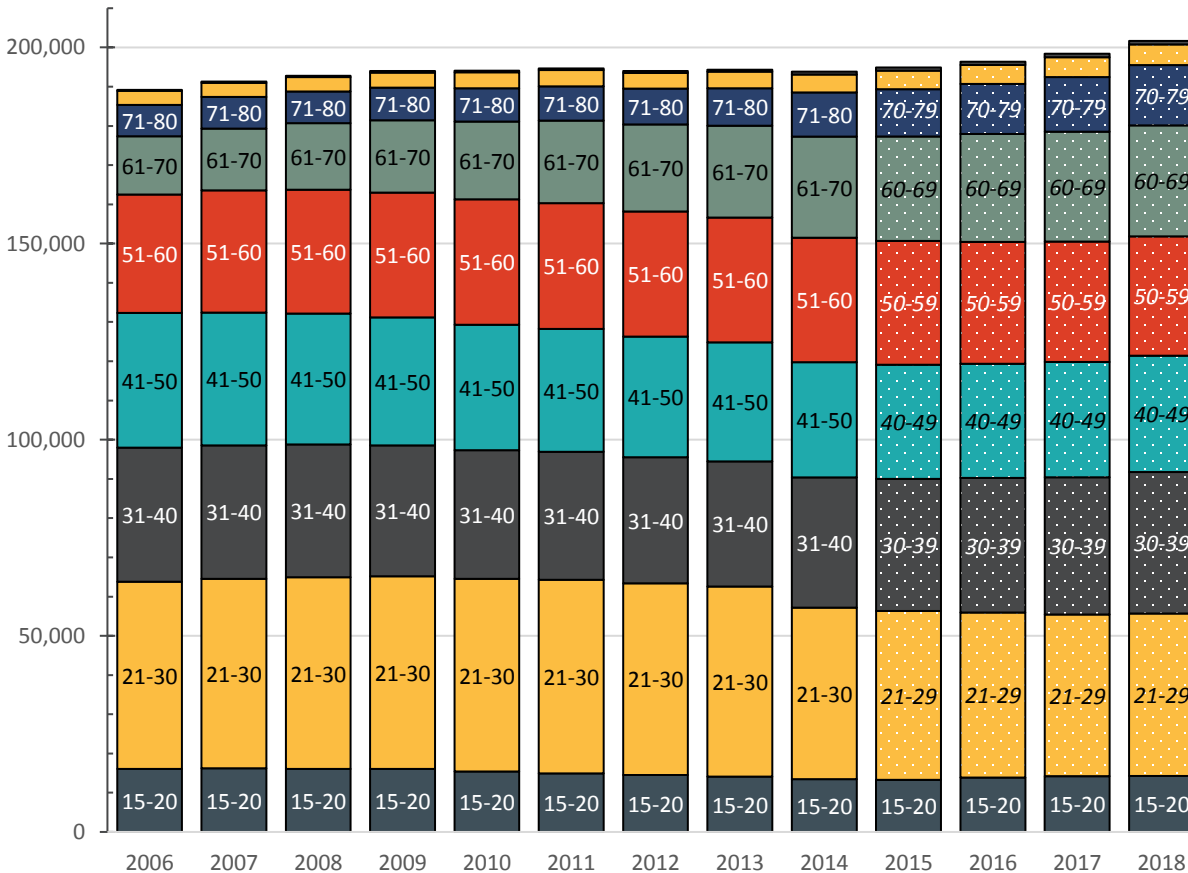
Trend: Between 2006 and 2018, the proportion of drivers licensed in Leon County age 60 or older increased from 14% to nearly 25%, while the proportion age 30 or younger decreased from 34% to 28%.

Year	15-20	21-30	31-40	41-50	51-60	61-70	71-80	81-90	91+	Female	Male
2006	16,065	47,730	34,189	34,328	30,194	14,829	7,978	3,590	318	97,179	92,042
2007	16,209	48,348	33,959	33,878	31,180	15,712	8,102	3,591	338	98,596	92,721
2008	16,038	48,921	33,844	33,329	31,591	16,949	8,128	3,678	330	99,647	93,161
2009	16,045	49,149	33,319	32,692	31,760	18,483	8,295	3,864	376	100,481	93,502
2010	15,395	49,096	32,836	31,990	31,947	19,831	8,534	4,059	422	100,834	93,276
2011	14,915	49,355	32,648	31,341	32,030	21,061	8,761	4,115	439	101,322	93,343
2012	14,546	48,846	32,099	30,828	31,884	22,172	9,107	4,063	455	101,209	92,791
2013	14,079	48,497	31,884	30,352	31,796	23,399	9,619	4,189	527	101,603	92,739
2014	13,438	43,732	33,229	29,387	31,670	25,807	11,244	4,599	709	101,377	92,438
2015	13,287	<i>43,048</i>	<i>33,675</i>	<i>29,099</i>	<i>31,565</i>	<i>26,623</i>	<i>12,052</i>	<i>4,737</i>	<i>784</i>	102,113	92,757
2016	13,869	<i>42,075</i>	<i>34,314</i>	<i>29,096</i>	<i>31,071</i>	<i>27,521</i>	<i>12,750</i>	<i>4,833</i>	<i>854</i>	102,962	93,421
2017	14,226	<i>41,212</i>	<i>34,980</i>	<i>29,398</i>	<i>30,697</i>	<i>28,007</i>	<i>13,926</i>	<i>5,062</i>	<i>860</i>	104,100	94,268
2018	14,271	<i>41,419</i>	<i>36,065</i>	<i>29,664</i>	<i>30,417</i>	<i>28,293</i>	<i>15,377</i>	<i>5,268</i>	<i>867</i>	105,830	95,811

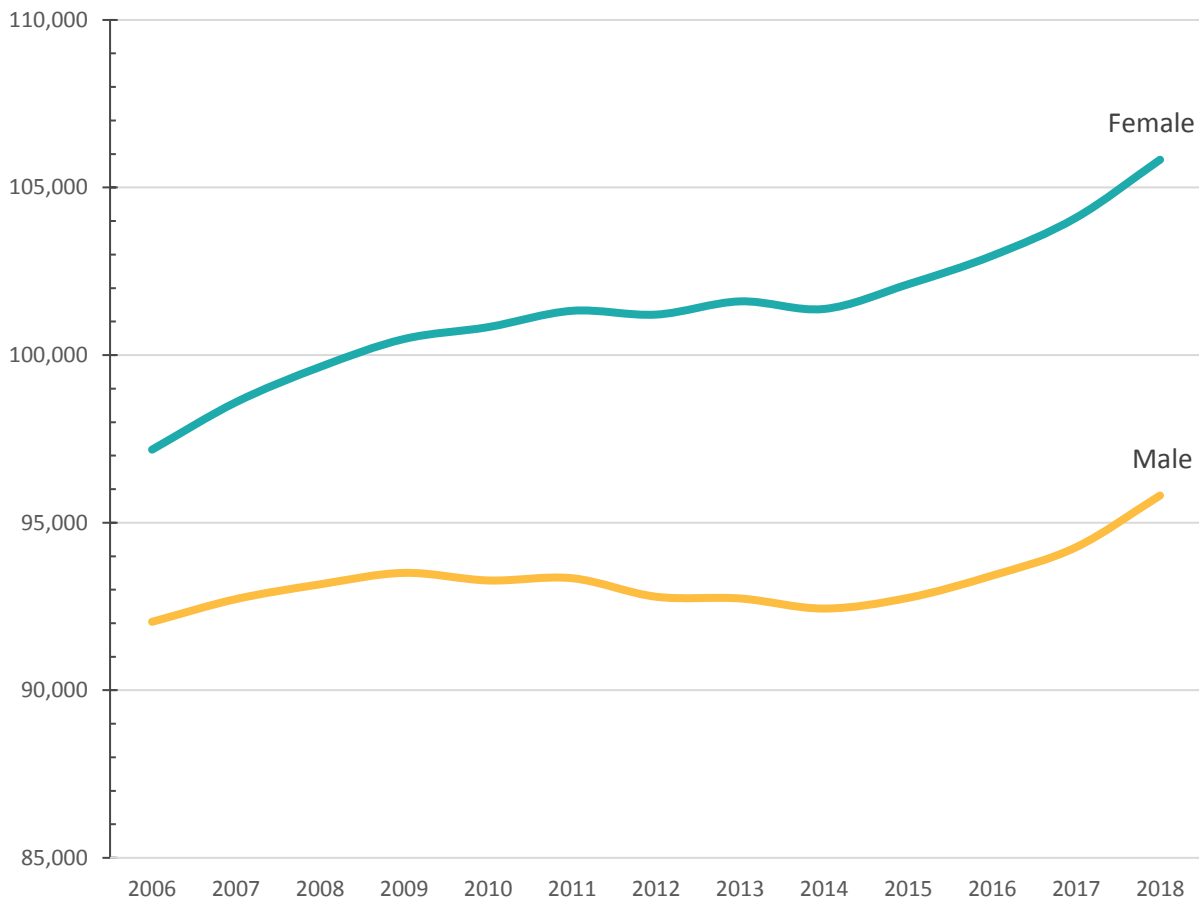
Source: Florida Department of Highway Safety and Motor Vehicles.

Note: Italics above indicates changes to age groups made in 2015. Ages 21-30 group became Ages 21-29, Ages 31-40 group became Ages 30-39, etc.

Motor Vehicle Licenses in Leon County by Age Group



Motor Vehicle Licenses in Leon County by Sex



Demographics

Population:

Origins of FSU and FAMU Students

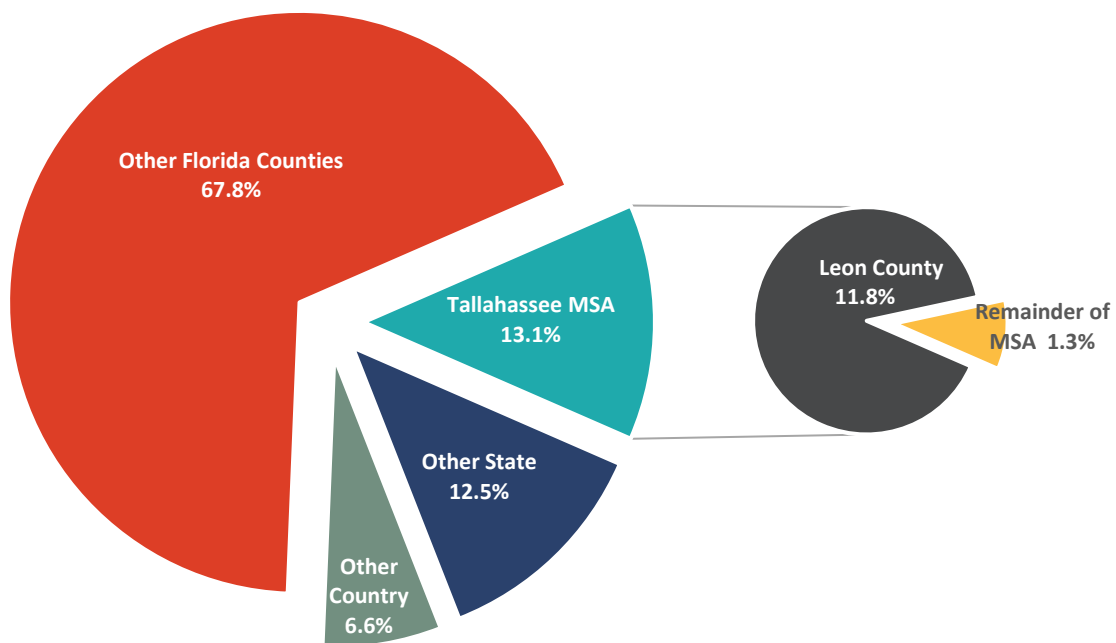
Trend: Over 80% of FSU and FAMU students are Florida residents, with the Tallahassee metro area accounting for about 13%. Broward, Miami-Dade, and Palm Beach counties together account for 23% of students.

Place of Origin	Students	Percent of Total
Florida	42,416	80.9%
Tallahassee MSA	6,792	13.1%
Leon County	6,107	11.8%
Remainder of Tallahassee MSA	685	1.3%
Outside Tallahassee MSA	35,624	67.8%
Broward	4,882	9.4%
Miami-Dade	3,906	7.5%
Palm Beach	3,396	6.5%
Remainder of Florida Counties	23,440	44.4%
Other State	6,479	12.5%
Georgia	1,320	2.5%
New York	423	0.8%
New Jersey	369	0.7%
Remainder of Other States	4,367	8.5%
Other Country	3,439	6.6%
China	641	1.2%
India	191	0.4%
Panama	350	0.7%
Remainder of Other Countries	2,257	4.3%

Note: Does not include ~1% missing data.

Source: State University System of Florida, Board of Governors, Student Instruction File, Fall 2016

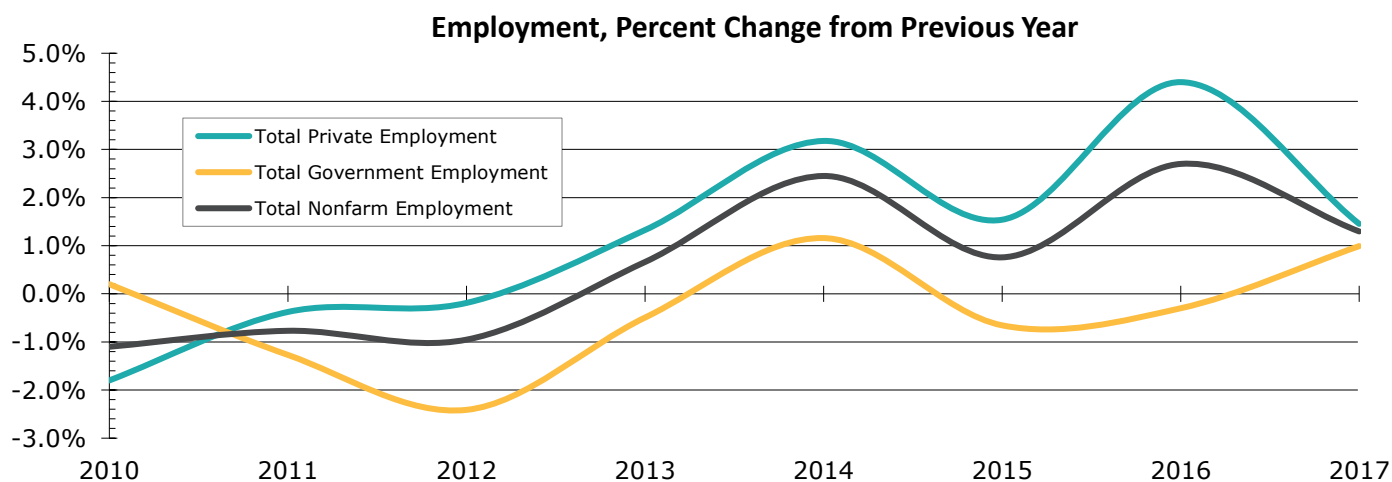
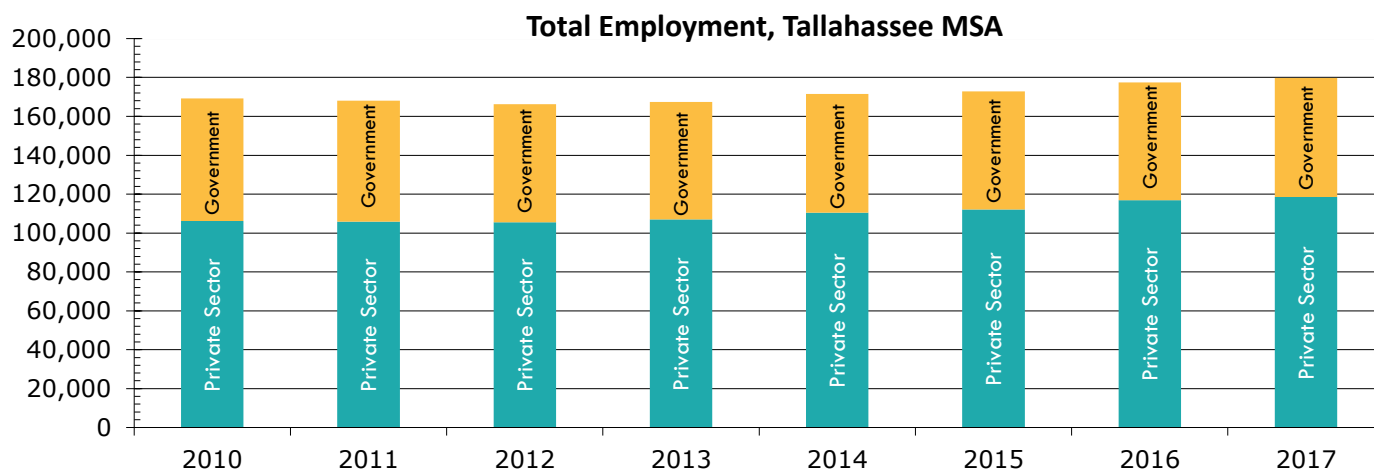
Origins of FSU and FAMU Students, Fall 2016



Trend: Total non-farm employment growth for the Tallahassee MSA for 2017 was 1.3%, a net increase of 2,300 jobs. Total private employment was up 1.5% (gain of 1,700 jobs) in 2017 while government employment was up 1.0% over the year (gain of 600 jobs).

Year	Total Private Employment		Total Government Employment		Total Nonfarm Employment	
	Employment	Change from Previous Year	Employment	Change from Previous Year	Employment	Change from Previous Year
2010	106,200	-1.8%	63,000	0.2%	169,200	-1.1%
2011	105,800	-0.4%	62,200	-1.3%	167,900	-0.8%
2012	105,600	-0.2%	60,700	-2.4%	166,300	-1.0%
2013	107,000	1.3%	60,400	-0.5%	167,400	0.7%
2014	110,400	3.2%	61,100	1.2%	171,500	2.4%
2015	112,100	1.5%	60,700	-0.7%	172,800	0.8%
2016	116,900	4.4%	60,500	-0.3%	177,400	2.7%
2017	118,600	1.5%	61,100	1.0%	179,700	1.3%

Source: Florida Dept. of Economic Opportunity, Labor Market Information, Current Employment Statistics Program





Workforce and Income

Unemployment Rate

Annual Average

Trend: The annual average local unemployment rate has continued to fall since 2010. Leon County's annual average unemployment rate for 2017 stood at 3.9% (4.0% for the Tallahassee MSA and 4.2% for the State of Florida).

Year	Leon County	Tallahassee MSA	State of Florida	United States
1990	3.2%	3.5%	6.1%	5.6%
1991	3.7%	4.2%	7.5%	6.8%
1992	4.0%	4.5%	8.2%	7.5%
1993	3.7%	6.6%	7.1%	6.9%
1994	3.5%	3.8%	6.4%	6.1%
1995	2.8%	3.1%	5.5%	5.6%
1996	2.9%	3.3%	5.2%	5.4%
1997	3.0%	3.3%	4.8%	4.9%
1998	2.9%	3.2%	4.3%	4.5%
1999	2.6%	2.8%	3.9%	4.2%
2000	3.1%	3.2%	3.7%	4.0%
2001	3.7%	3.9%	4.7%	4.7%
2002	4.5%	4.6%	5.6%	5.8%
2003	4.2%	4.3%	5.2%	6.0%
2004	3.8%	3.9%	4.6%	5.5%
2005	3.2%	3.2%	3.7%	5.1%
2006	2.7%	2.8%	3.2%	4.6%
2007	3.1%	3.3%	4.0%	4.6%
2008	4.7%	4.8%	6.3%	5.8%
2009	7.1%	7.4%	10.4%	9.3%
2010	7.9%	8.4%	11.1%	9.6%
2011	7.8%	8.3%	10.0%	8.9%
2012	7.0%	7.4%	8.5%	8.1%
2013	6.1%	6.4%	7.2%	7.4%
2014	5.5%	5.8%	6.3%	6.2%
2015	5.0%	5.2%	5.5%	5.3%
2016	4.5%	4.7%	4.8%	4.9%
2017	3.9%	4.0%	4.2%	4.4%

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



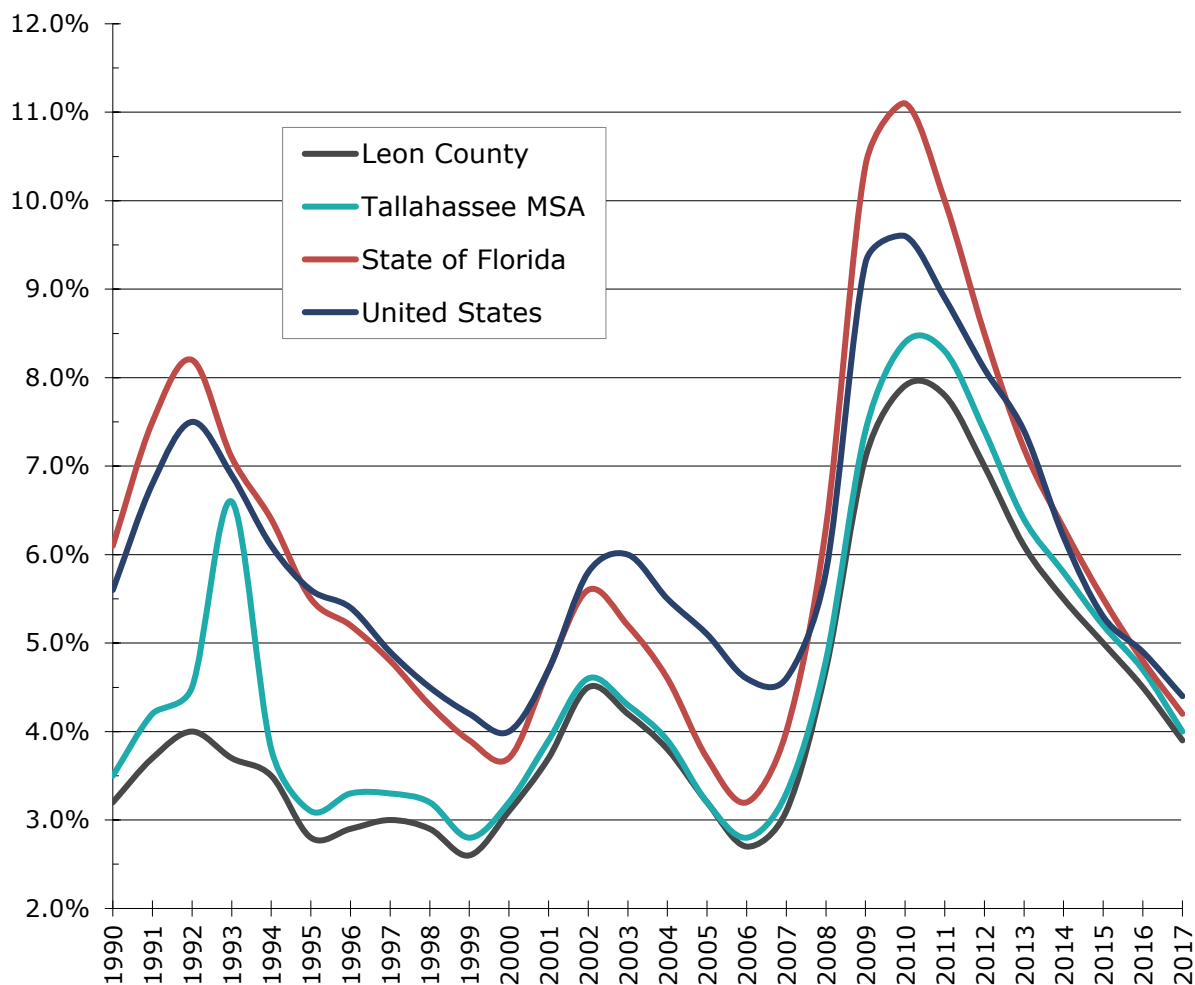
Workforce and Income

Unemployment Rate

Annual Average

Trend: The annual average local unemployment rate has continued to fall since 2010. Leon County's annual average unemployment rate for 2017 stood at 3.9% (4.0% for the Tallahassee MSA and 4.2% for the State of Florida).

Average Annual Unemployment Rate



Workforce and Income

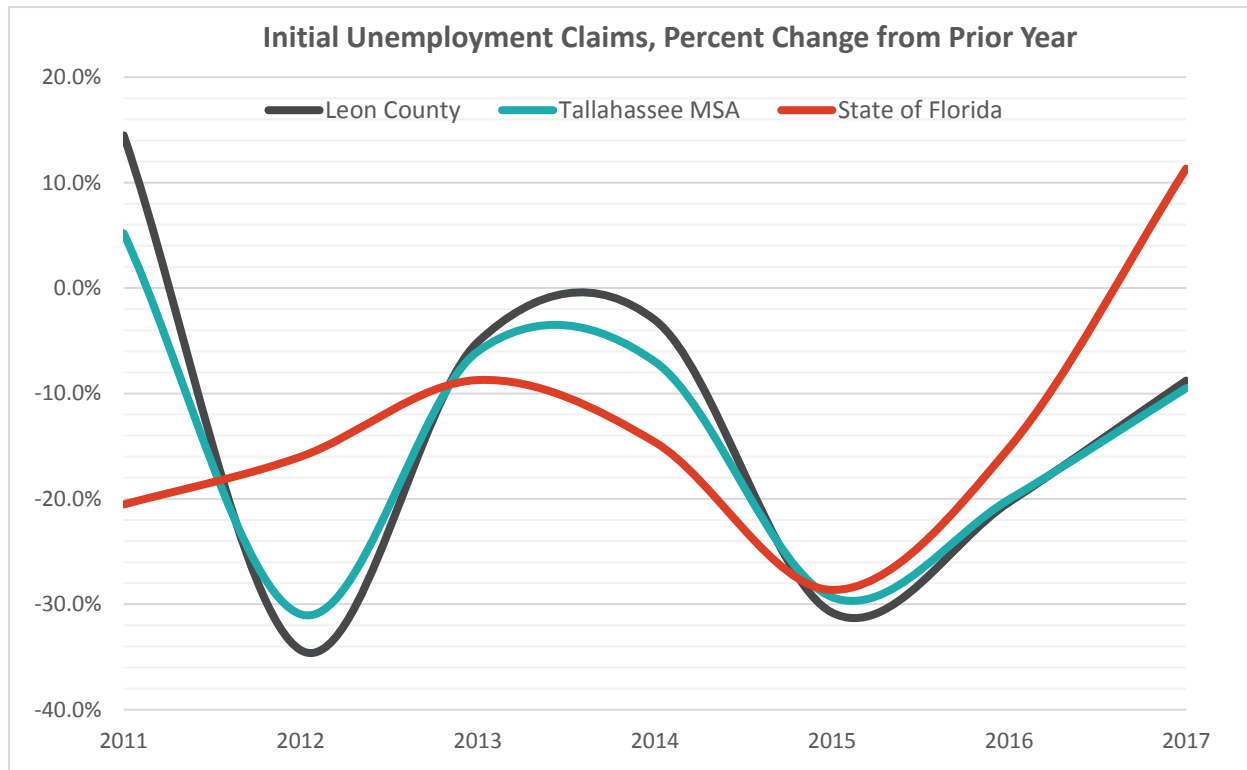
Initial Claims for Unemployment Compensation

Trend: Initial claims for unemployment compensation declined for the sixth straight year in 2017.

Year	Leon County		Tallahassee MSA		State of Florida	
	Initial Unemployment Claims	Percent Change from Prior Year	Initial Unemployment Claims	Percent Change from Prior Year	Initial Unemployment Claims	Percent Change from Prior Year
2011	13,570	14.5%	17,555	5.2%	909,713	-20.5%
2012	8,908	-34.4%	12,121	-31.0%	764,167	-16.0%
2013	8,452	-5.1%	11,392	-6.0%	697,457	-8.7%
2014	8,196	-3.0%	10,597	-7.0%	595,498	-14.6%
2015	5,673	-30.8%	7,490	-29.3%	424,955	-28.6%
2016	4,520	-20.3%	5,988	-20.1%	360,497	-15.2%
2017	4,123	-8.8%	5,419	-9.5%	401,324	11.3%

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

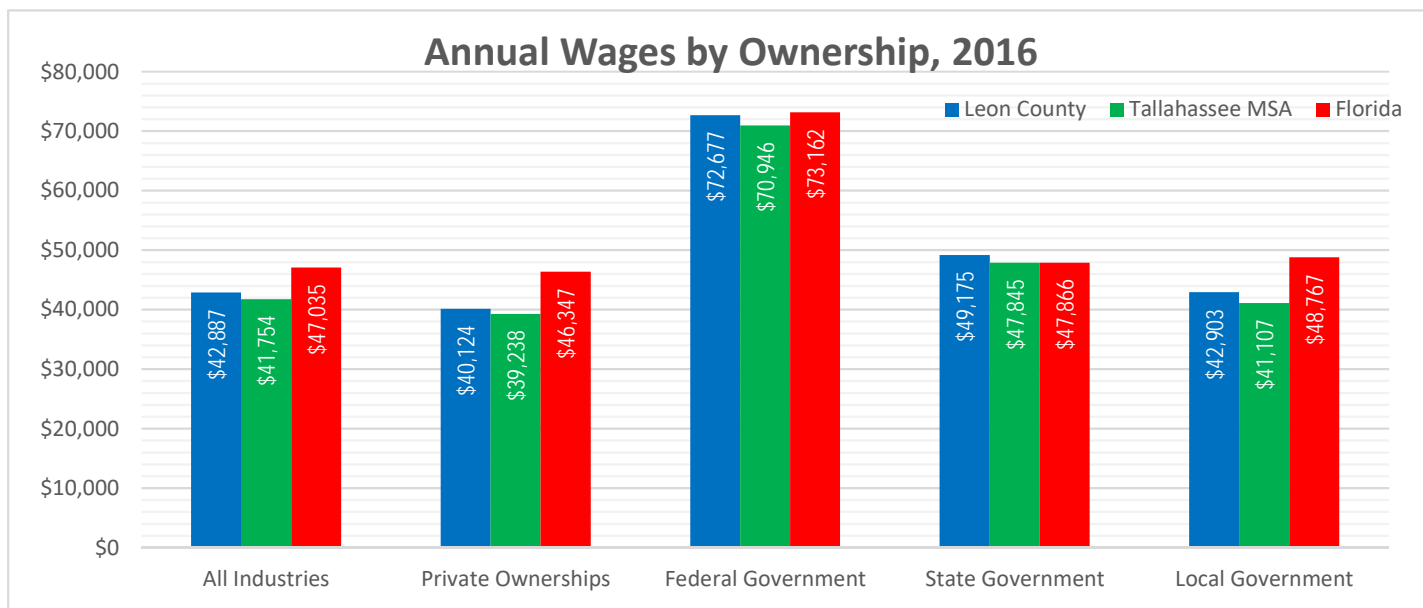
Average Annual Employment/Wages

Annual Average Employment and Wages by Ownership

Trend: The average annual wage in Leon County in 2016 was \$42,887, 8.8% below the state average wage of \$47,035. The annual average state government wage was 2.7% higher in Leon County compared to the state average while the local government wage in Leon County was 12.0% lower than the state's average.

Ownership Type	Annual Establishments	Annual Average Employment	Annual Average Weekly Wage	Annual Wages Per Employee
Leon County				
All Industries	8,502	146,254	\$825	\$42,887
Private Ownerships	8,243	98,061	\$772	\$40,124
Federal Government	47	1,776	\$1,398	\$72,677
State Government	188	34,650	\$946	\$49,175
Local Government	24	11,767	\$825	\$42,903
Tallahassee MSA				
All Industries	10,112	166,991	\$803	\$41,754
Private Ownerships	9,740	111,930	\$755	\$39,238
Federal Government	73	1,989	\$1,364	\$70,946
State Government	245	38,255	\$920	\$47,845
Local Government	54	14,816	\$791	\$41,107
Florida				
All Industries	658,095	8,309,351	\$905	\$47,035
Private Ownerships	651,939	7,262,168	\$891	\$46,347
Federal Government	2,001	137,352	\$1,407	\$73,162
State Government	2,562	182,288	\$921	\$47,866
Local Government	1,594	727,543	\$938	\$48,767

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment & Wages





Workforce and Income

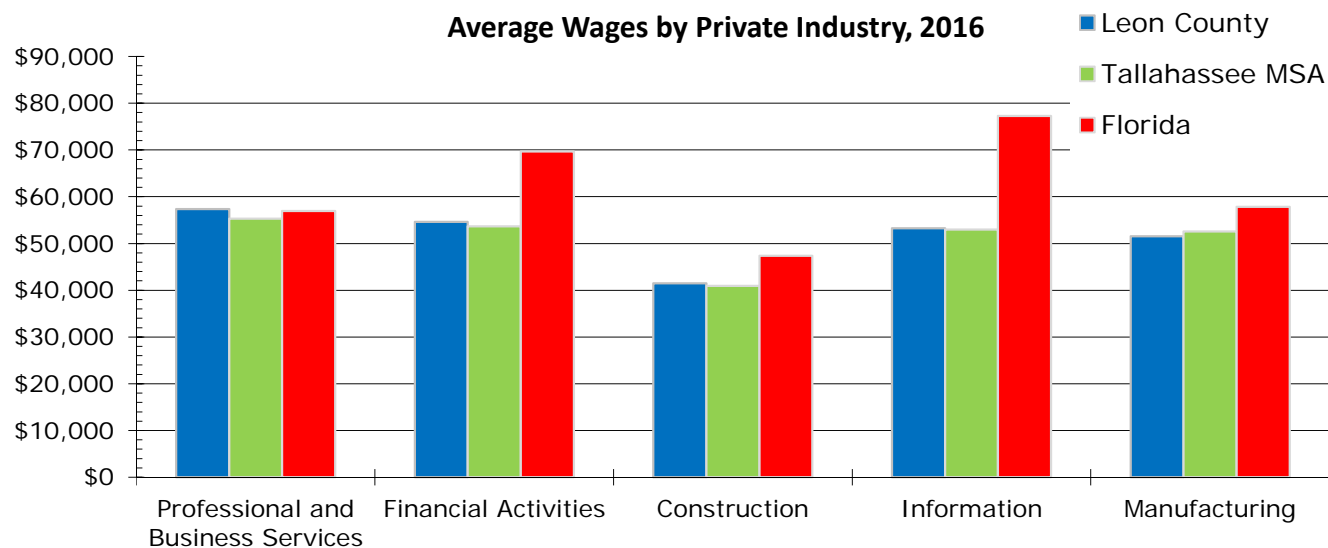
Average Annual Employment/Wages

Average Annual Employment & Wages, Select Private Industries

Trend: The average private sector annual wage in Leon County in 2016 was \$40,124, 13.4% below the state average private wage of \$46,347. By industry type, Leon County's private average annual wage ranged from 31.4% lower than the state average for the Information industry sector to 0.8% higher than the state average for the Professional and Business Services industry sector.

Industry Type	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
Professional and Business Services	2,163	16,883	\$57,387
Financial Activities	892	6,737	\$54,631
Construction	711	5,614	\$41,460
Information	170	2,812	\$53,275
Manufacturing	129	1,688	\$51,544
Tallahassee MSA			
Professional and Business Services	2,367	18,617	\$55,310
Financial Activities	983	7,109	\$53,692
Construction	963	7,031	\$40,912
Information	184	2,949	\$52,951
Manufacturing	169	3,105	\$52,562
Florida			
Professional and Business Services	151,763	1,284,503	\$56,935
Financial Activities	70,550	543,014	\$69,690
Construction	64,576	474,134	\$47,342
Information	10,745	136,952	\$77,258
Manufacturing	20,271	354,863	\$57,817

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment & Wages

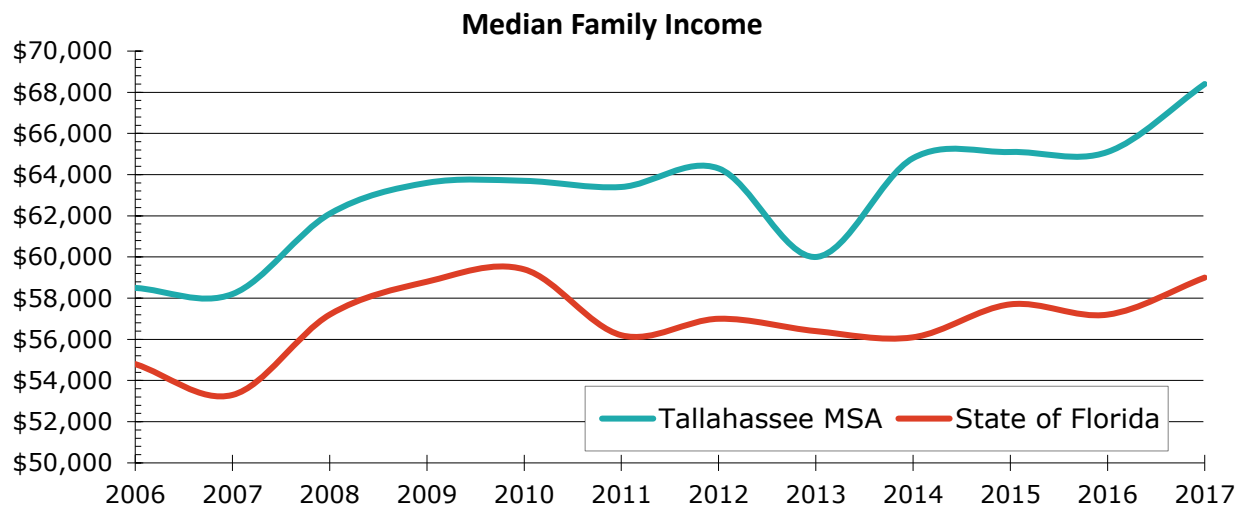


Trend: Median family income for the Tallahassee metro area was \$68,400 in 2017, according to the Federal Financial Institutions Examination Council. The median family income in 2016 in Leon County was \$71,030 according to the Census Bureau's 2012-2016 5-Year American Community Survey.

Year	Tallahassee MSA	State of Florida	Median Income of Tallahassee MSA Relative to State of Florida
2006	\$58,500	\$54,800	6.5% higher
2007	\$58,200	\$53,300	8.8% higher
2008	\$62,100	\$57,200	8.2% higher
2009	\$63,600	\$58,800	7.8% higher
2010	\$63,700	\$59,400	7.0% higher
2011	\$63,400	\$56,200	12.1% higher
2012	\$64,300	\$57,000	12.1% higher
2013	\$60,000	\$56,400	6.2% higher
2014	\$64,800	\$56,100	14.4% higher
2015	\$65,100	\$57,700	12.1% higher
2016	\$65,100	\$57,200	12.9% higher
2017	\$68,400	\$59,000	14.8% higher

Note: The Core-Based Statistical Area (CBSA) definition for median family income estimates for Tallahassee MSA includes Leon, Gadsden, Jefferson, and Wakulla counties.

Source: U.S. Department of Housing and Urban Development (HUD), 2006-2011; Federal Financial Institutions Examination Council (FFIEC), 2012 and forward.



Median Family Income 2016, by jurisdiction

	2016
Leon County	\$71,030
Tallahassee MSA*	\$64,605
City of Tallahassee	\$63,475
Florida	\$59,139

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

Source: U.S. Census Bureau, 2012-2016 5-Year American Community Survey



Demographics

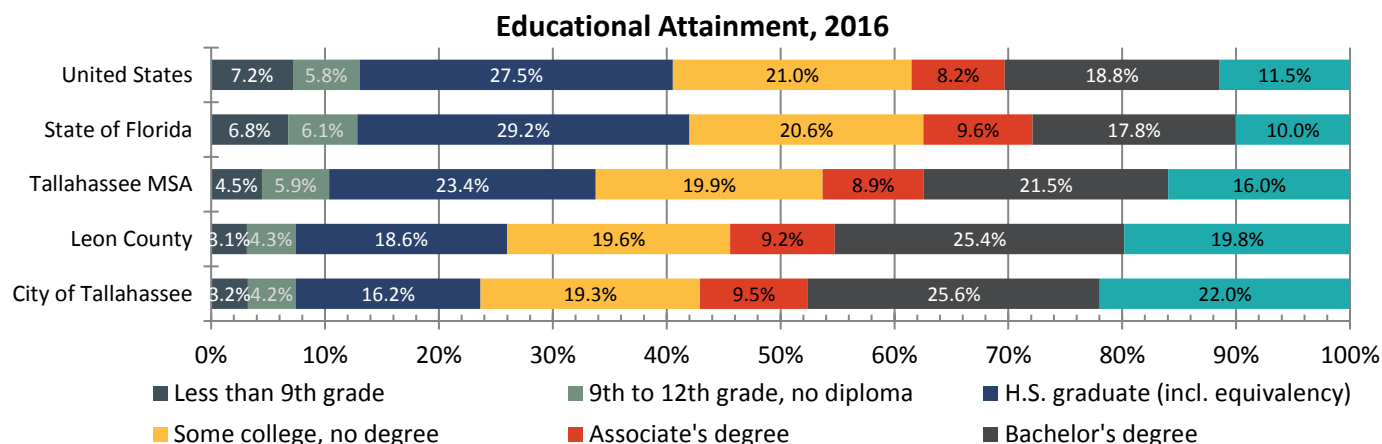
Population:

Educational Attainment

Trend: The level of educational attainment has steadily increased in Leon County. As of 2016, 45.2% of Leon County residents 25 years and over had obtained a Bachelor's degree or higher, up from 41.7% in 2000. In comparison, 27.8% of State of Florida residents and 30.3% of US residents 25 years and over had obtained a Bachelor's degree or higher. Nearly 48% of Tallahassee residents had a bachelor's degree or higher.

Educational Attainment Level as of 2016*	City of Tallahassee	Leon County	Tallahassee MSA	State of Florida	United States
Less than 9th grade	3.2%	3.1%	4.5%	6.8%	7.2%
9th to 12th grade, no diploma	4.2%	4.3%	5.9%	6.1%	5.8%
H.S. graduate (incl. equivalency)	16.2%	18.6%	23.4%	29.2%	27.5%
Some college, no degree	19.3%	19.6%	19.9%	20.6%	21.0%
Associate's degree	9.5%	9.2%	8.9%	9.6%	8.2%
Bachelor's degree	25.6%	25.4%	21.5%	17.8%	18.8%
Graduate or professional degree	22.0%	19.8%	16.0%	10.0%	11.5%

* Population 25 years and older.



Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2012-2016

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



Workforce and Income

Employment by Industry:

Tallahassee MSA Non-Agricultural Employment by Industry, 2012-2017

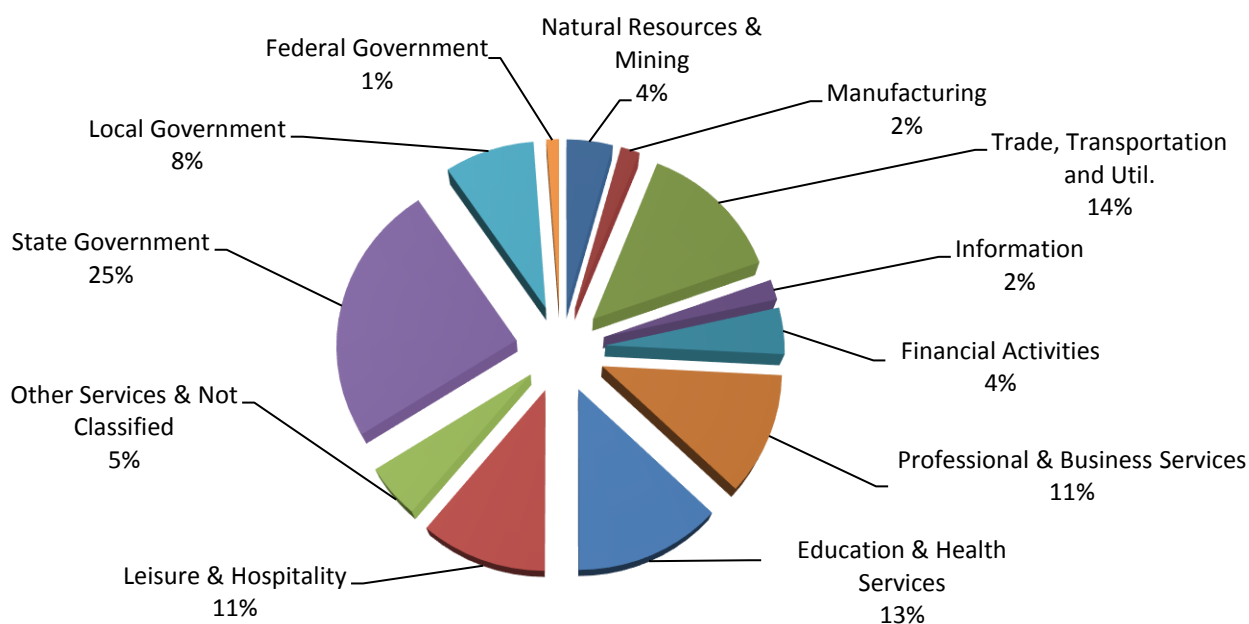
Trend: Private sector job growth in 2017 was led by gains in Education & Health Services (1,400 jobs), Financial Activities (300 jobs), Information (200 jobs), and Construction (200 jobs).

Industry Type	2012	2013	2014	2015	2016	2017	Avg. Ann. Rate Change 2012-2017
Mining, Logging & Construction	5,900	6,200	6,300	6,700	7,500	7,700	5.3%
Manufacturing	3,200	3,100	2,900	3,100	3,100	3,200	0.0%
Trade, Transportation and Util.	22,200	22,800	23,700	24,200	24,400	24,300	1.8%
Information	3,300	3,400	3,900	3,500	3,200	3,400	0.6%
Financial Activities	7,200	7,300	7,100	7,000	7,500	7,800	1.6%
Professional & Business Services	18,200	18,500	19,000	19,000	20,300	20,300	2.2%
Education & Health Services	19,700	19,700	20,600	21,100	21,800	23,200	3.3%
Leisure & Hospitality	16,800	17,200	17,900	18,700	19,600	19,800	3.3%
Other Services & Not Classified	9,200	8,800	9,000	8,900	9,400	8,900	-0.7%
State Government	42,800	42,800	43,900	43,500	43,200	44,000	0.6%
Local Government	15,900	15,600	15,200	15,300	15,300	15,000	-1.2%
Federal Government	1,900	2,000	1,900	2,000	2,000	2,100	2.0%
Total	166,300	167,400	171,400	173,000	177,300	179,700	1.5%

Source: U.S. Department of Labor, Bureau of Labor Statistics, Current Employment Statistics Program.

Prepared by: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics

Non-Agricultural Employment by Industry, Tallahassee MSA (2017)





Workforce and Income

Projected Employment by Occupation:

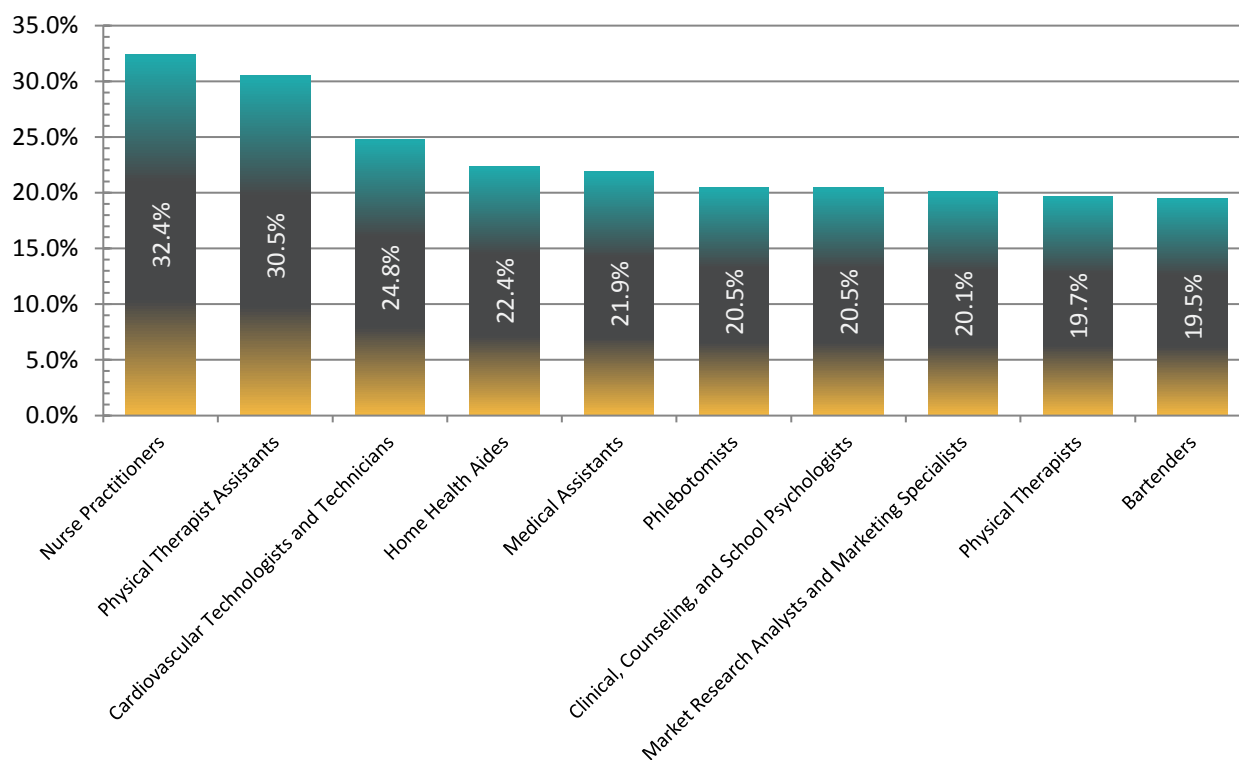
Fastest Growing Occupations in Leon County (2017-2025)

Trend: The top occupation by projected annual percentage growth in Leon County is Nurse Practitioners and Physical Therapy Assistants.

Industry	2017 Emp.	2025 Emp.	Total Emp. Change	Percent Growth
Nurse Practitioners	145	192	47	32.4%
Physical Therapist Assistants	154	201	47	30.5%
Cardiovascular Technologists and Technicians	125	156	31	24.8%
Home Health Aides	473	579	106	22.4%
Medical Assistants	508	619	111	21.9%
Phlebotomists	229	276	47	20.5%
Clinical, Counseling, and School Psychologists	132	159	27	20.5%
Market Research Analysts and Marketing Specialists	558	670	112	20.1%
Physical Therapists	239	286	47	19.7%
Bartenders	861	1029	168	19.5%

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

Fastest Growing Occupations, Percent Growth 2017-2025





Workforce and Income

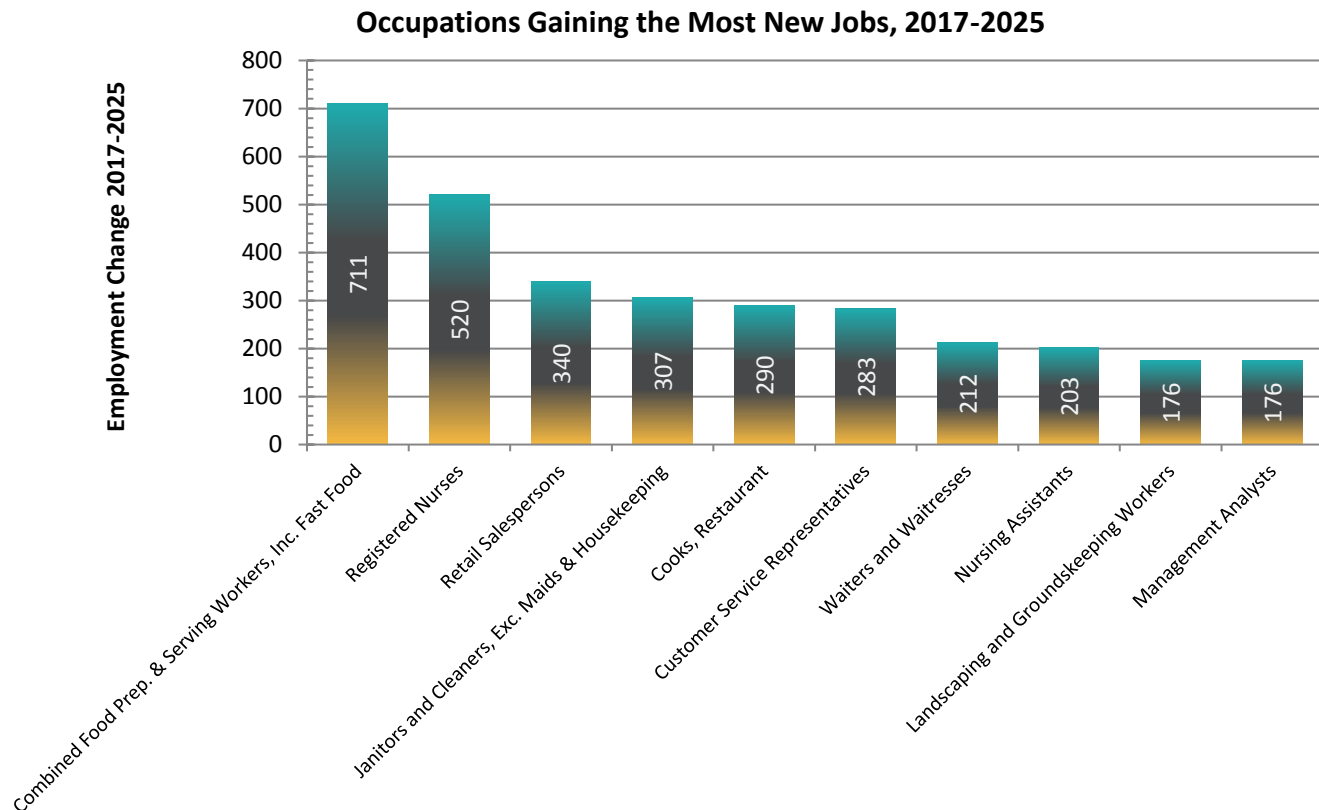
Projected Employment by Occupation:

Occupations Gaining the Most New Jobs (2017-2025)

Trend: By total employment change, Food Prep. and Serving Workers and Registered Nurses are the occupations projected to add the most jobs by 2025.

Industry	2017 Emp.	2025 Emp.	Total Emp. Change	Percent Growth
Combined Food Prep. & Serving Workers, Inc. Fast Food	5,076	5,787	711	14.0%
Registered Nurses	3,055	3,575	520	17.0%
Retail Salespersons	4,969	5,309	340	6.8%
Janitors and Cleaners, Exc. Maids & Housekeeping	2,560	2,867	307	12.0%
Cooks, Restaurant	1,771	2,061	290	16.4%
Customer Service Representatives	3,049	3,332	283	9.3%
Waiters and Waitresses	3,414	3,626	212	6.2%
Nursing Assistants	1,168	1,371	203	17.4%
Landscaping and Groundskeeping Workers	1,378	1,554	176	12.8%
Management Analysts	5,943	6,119	176	3.0%

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





Workforce and Income

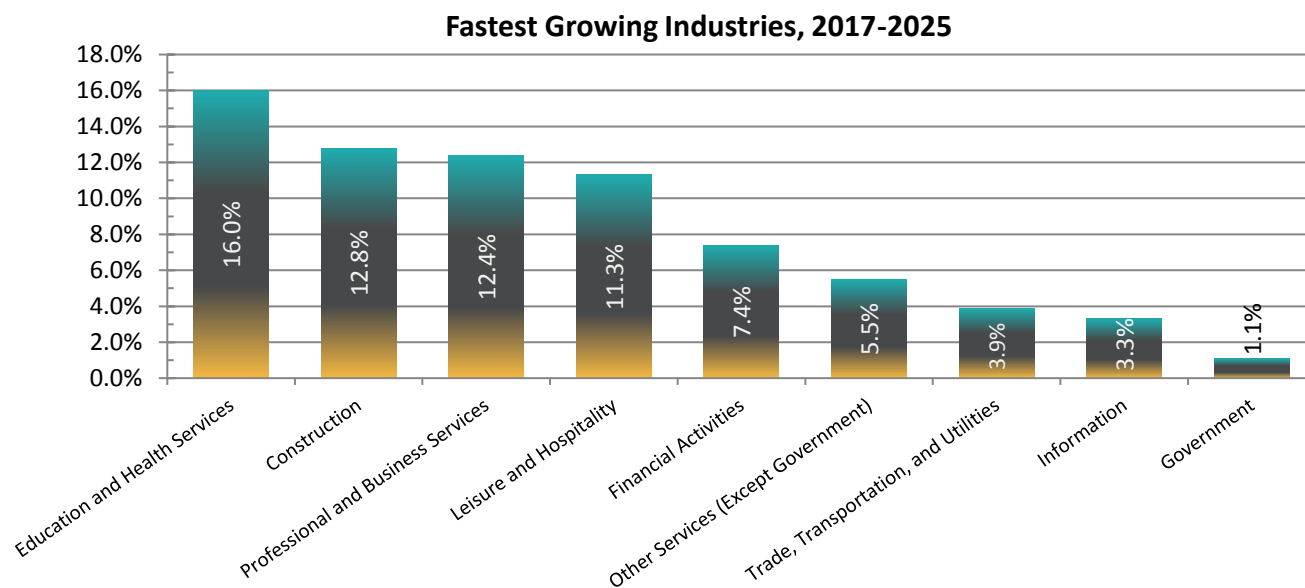
Projected Employment by Industry:

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 Education and Health Services is expected to experience the largest annual percentage growth in employment by major industry between 2017 and 2025.

Industry	2017 Emp.	2025 Emp.	Total Emp. Change	Percent Growth
Education and Health Services	20,768	24,098	3,330	16.0%
Construction	6,034	6,805	771	12.8%
Professional and Business Services	19,476	21,884	2,408	12.4%
Leisure and Hospitality	18,634	20,739	2,105	11.3%
Financial Activities	7,142	7,669	527	7.4%
Other Services (Except Government)	7,144	7,537	393	5.5%
Trade, Transportation, and Utilities	21,094	21,907	813	3.9%
Information	2,993	3,091	98	3.3%
Government	52,724	53,315	591	1.1%
Manufacturing	1,734	1,725	-9	-0.5%
Agriculture, Forestry, Fishing and Hunting	333	314	-19	-5.7%
Mining	8	7	-1	-12.5%
Total All Industries	169,152	180,900	11,748	6.9%

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



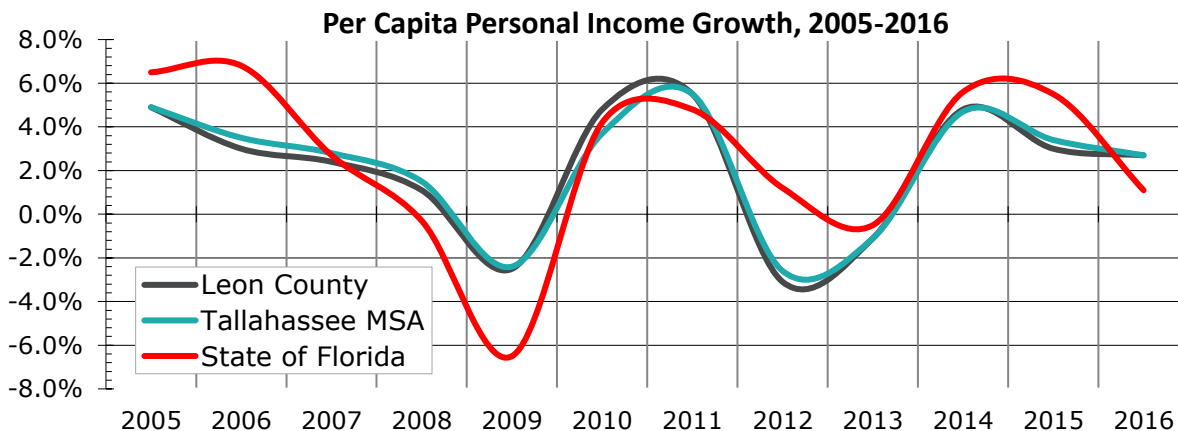
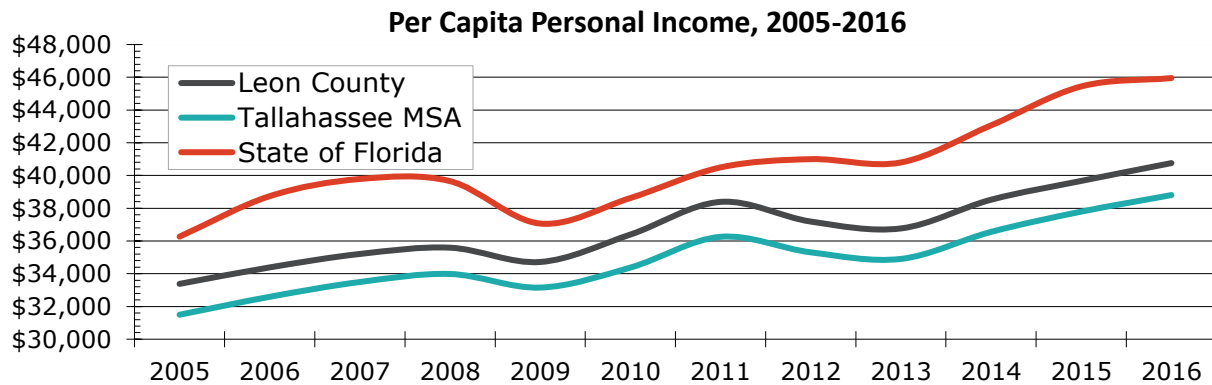
Workforce and Income

Per Capita Personal Income

Trend: Per capita personal increased 2.7% in Leon County in 2016 and was 88.7% 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 and the Tallahassee MSA due to the large number of college students residing in our community.

Year	Leon County	Percent Change from Prior Year	Tallahassee MSA	Percent Change from Prior Year	State of Florida	Percent Change from Prior Year
2005	\$33,380	4.9%	\$31,496	4.9%	\$36,268	6.5%
2006	\$34,387	3.0%	\$32,591	3.5%	\$38,738	6.8%
2007	\$35,208	2.4%	\$33,495	2.8%	\$39,788	2.7%
2008	\$35,592	1.1%	\$33,985	1.5%	\$39,655	-0.3%
2009	\$34,718	-2.5%	\$33,154	-2.4%	\$37,065	-6.5%
2010	\$36,394	4.8%	\$34,377	3.7%	\$38,626	4.2%
2011	\$38,390	5.5%	\$36,256	5.5%	\$40,494	4.8%
2012	\$37,188	-3.1%	\$35,308	-2.6%	\$41,000	1.2%
2013	\$36,768	-1.1%	\$34,905	-1.1%	\$40,797	-0.5%
2014	\$38,522	4.8%	\$36,556	4.7%	\$43,064	5.6%
2015	\$39,670	3.0%	\$37,794	3.4%	\$45,441	5.5%
2016	\$40,758	2.7%	\$38,806	2.7%	\$45,953	1.1%

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

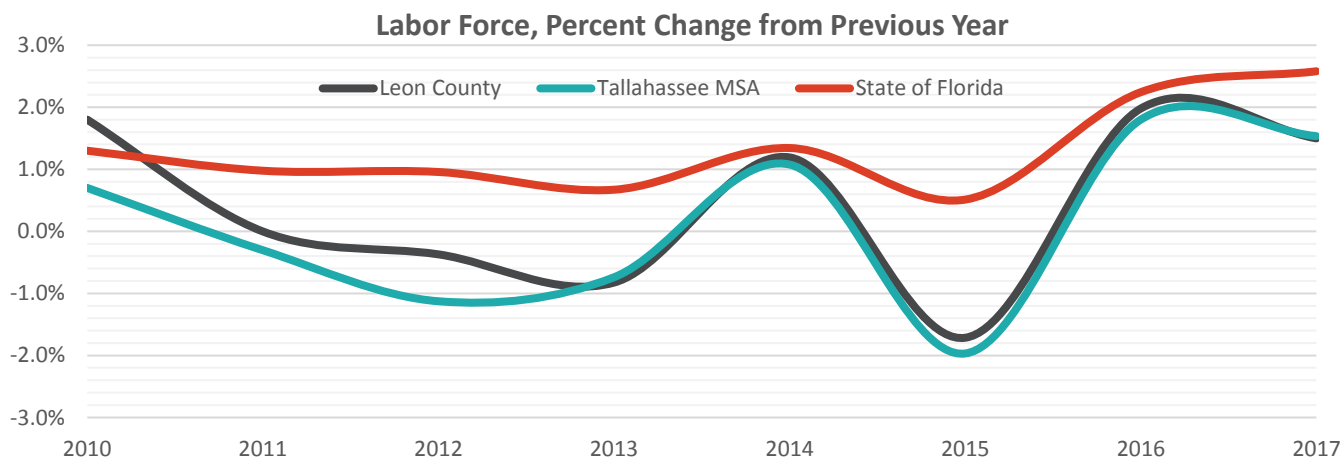
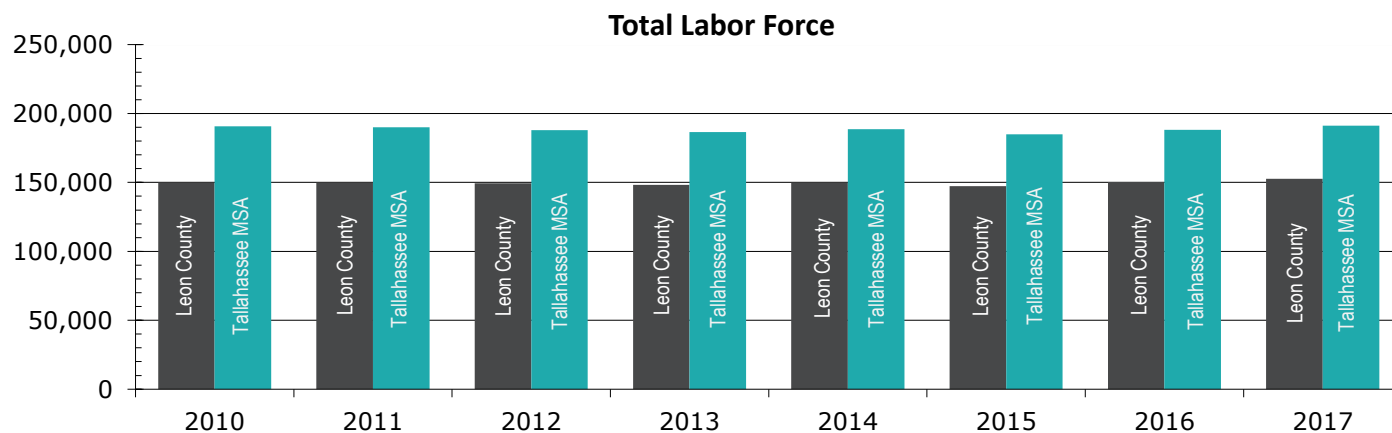


Trend: The Tallahassee MSA's labor force grew 1.5% in 2017, following a 1.8% gain in 2016.

Year	Leon County		Tallahassee MSA		State of Florida	
	Labor Force	Change from Previous Year	Labor Force	Change from Previous Year	Labor Force	Change from Previous Year
2010	149,972	1.8%	190,684	0.7%	9,212,000	1.3%
2011	149,969	0.0%	190,104	-0.3%	9,302,000	1.0%
2012	149,413	-0.4%	187,962	-1.1%	9,391,000	1.0%
2013	148,180	-0.8%	186,572	-0.7%	9,454,000	0.7%
2014	149,946	1.2%	188,581	1.1%	9,581,000	1.3%
2015	147,375	-1.7%	184,869	-2.0%	9,630,000	0.5%
2016	150,292	2.0%	188,198	1.8%	9,846,000	2.2%
2017	152,544	1.5%	191,085	1.5%	10,100,000	2.6%

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





Labor Force and Income

Job Creation and Destruction Rates

Tallahassee MSA, 1977-2014

Trend: Job creation and job destruction are necessary for a dynamic, growing economy. Job Creation is the sum of all employment gains from expanding establishments from one year to the next including establishment startups. Job Destruction is the sum of all employment losses from contracting establishments from one year to the next including establishments shutting down. The job creation rate is calculated as the total number of jobs created by new firms or added at existing firms, divided by total employment. Job destruction rate is calculated as the total number of jobs that were destroyed by either closing or contracting firms, divided by total employment. The net employment change equals the job creation rate minus the job destruction rate. Trend lines use Hodrick-Prescott (HP) filter as a data-smoothing technique to remove short-term fluctuations and display long-term trends.

Year	Tallahassee MSA Job Creation Rate	Tallahassee MSA Job Destruction Rate	Tallahassee MSA Job Creation Trend	Tallahassee MSA Job Destruction Trend	Net Empl. Change
1977	21.2	21.8	23.6	19.3	-0.6
1978	25.9	16.0	23.3	18.8	9.9
1979	23.8	15.8	23.0	18.4	8.0
1980	22.6	21.6	22.7	18.0	1.0
1981	21.6	17.7	22.4	17.5	3.9
1982	21.8	17.4	22.1	17.1	4.4
1983	19.9	18.1	21.8	16.7	1.8
1984	23.1	13.7	21.4	16.3	9.4
1985	20.6	16.4	21.1	16.0	4.2
1986	21.7	15.5	20.7	15.7	6.2
1987	22.4	14.0	20.3	15.4	8.4
1988	20.0	15.6	19.9	15.2	4.4
1989	19.1	15.0	19.5	15.1	4.1
1990	18.9	14.7	19.0	15.0	4.2
1991	17.1	16.5	18.7	14.9	0.6
1992	18.5	16.4	18.3	14.9	2.1
1993	18.0	13.7	18.0	14.8	4.3
1994	17.4	13.3	17.8	14.8	4.1
1995	16.1	14.2	17.6	14.8	1.9
1996	17.7	14.7	17.5	14.9	3.0
1997	18.1	17.4	17.4	15.0	0.7
1998	15.9	13.7	17.4	15.1	2.2
1999	16.1	14.0	17.4	15.2	2.1
2000	18.1	15.1	17.3	15.4	3.0
2001	16.3	13.6	17.3	15.5	2.7
2002	22.3	17.0	17.2	15.6	5.3
2003	16.7	19.4	17.0	15.7	-2.7
2004	17.0	17.0	16.7	15.7	0.0
2005	16.7	12.9	16.4	15.6	3.8
2006	16.8	14.1	16.0	15.4	2.7
2007	16.5	16.4	15.5	15.1	0.1



Labor Force and Income

Job Creation and Destruction Rates

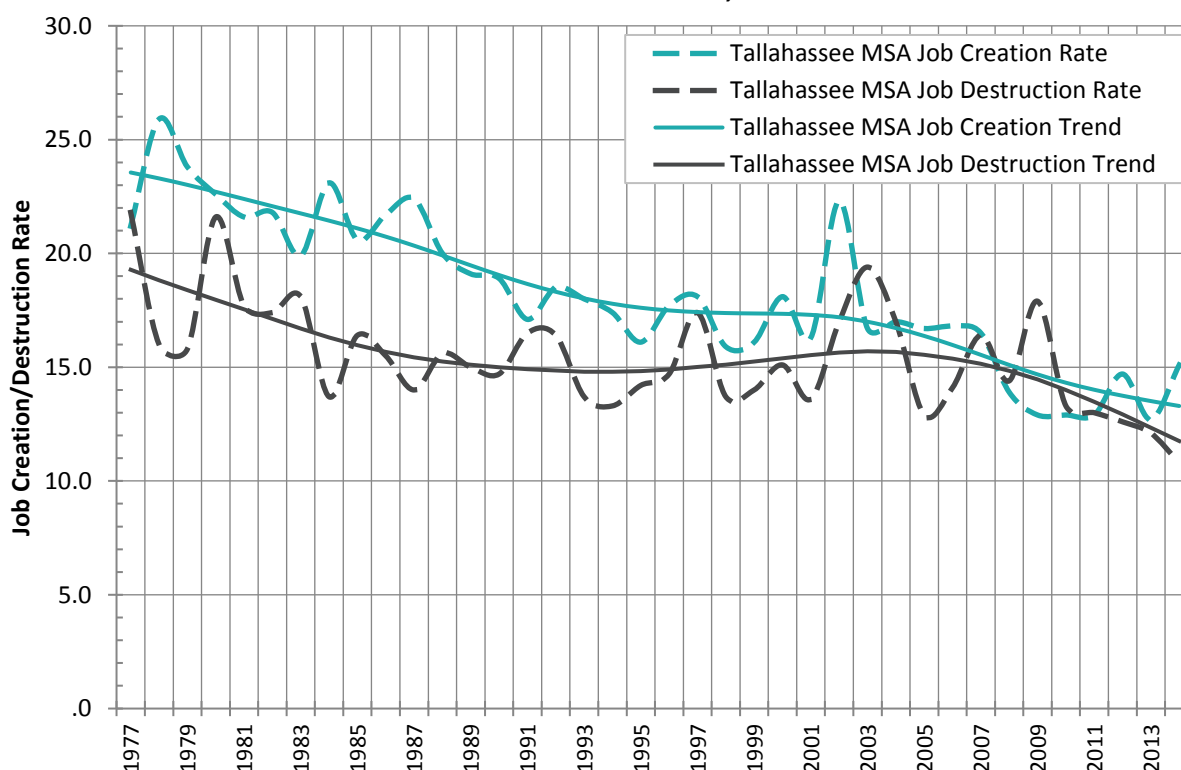
Tallahassee MSA, 1977-2014

Trend: Job creation and job destruction are necessary for a dynamic, growing economy. Job Creation is the sum of all employment gains from expanding establishments from one year to the next including establishment startups. Job Destruction is the sum of all employment losses from contracting establishments from one year to the next including establishments shutting down. The job creation rate is calculated as the total number of jobs created by new firms or added at existing firms, divided by total employment. Job destruction rate is calculated as the total number of jobs that were destroyed by either closing or contracting firms, divided by total employment. The net employment change equals the job creation rate minus the job destruction rate. Trend lines use Hodrick-Prescott (HP) filter as a data-smoothing technique to remove short-term fluctuations and display long-term trends.

Year	Tallahassee MSA Job Creation Rate	Tallahassee MSA Job Destruction Rate	Tallahassee MSA Job Creation Trend	Tallahassee MSA Job Destruction Trend	Net Empl. Change
2008	13.9	14.4	15.1	14.8	-0.5
2009	12.9	17.9	14.7	14.5	-5.0
2010	12.9	13.3	14.3	14.0	-0.4
2011	12.9	13.0	14.0	13.5	-0.1
2012	14.7	12.6	13.7	12.9	2.1
2013	12.7	12.1	13.5	12.3	0.6
2014	15.1	10.8	13.3	11.8	4.3

Source: U.S. Census Bureau, Center for Economic Studies, Business Dynamics Statistics

Job Creation and Destruction Rates, Tallahassee MSA





Workforce and Income
Occupational Employment and Wages
Occupations with Employment of 1,000+

Trend: The 2017 estimated average hourly wage for all occupations in the Tallahassee MSA is \$21.60, with an average wage of \$27.31 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2016	(2017 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Total All Occupations	164,140	\$21.60	\$16.91	\$10.16	\$27.31
Combined Food Prep. & Serving Workers, Incl. Fast Food	5,330	\$9.91	\$9.50	\$9.14	\$10.29
Retail Salespersons	5,260	\$11.94	\$9.71	\$8.89	\$13.46
Management Analysts	4,840	\$26.22	\$23.58	\$18.70	\$29.98
Cashiers	4,710	\$9.65	\$9.20	\$8.85	\$10.05
Secretaries & Admin. Assistants, Except Legal, Medical	4,630	\$16.42	\$15.72	\$11.81	\$18.73
Waiters and Waitresses	3,550	\$15.79	\$12.00	\$9.06	\$19.15
Registered Nurses	3,230	\$29.29	\$28.72	\$21.95	\$32.95
Office Clerks, General	2,990	\$13.05	\$12.09	\$9.90	\$14.62
Customer Service Representatives	2,920	\$14.53	\$13.59	\$10.36	\$16.62
Janitors & Cleaners, Exc. Maids & Housekeeping Cleaners	2,630	\$11.40	\$10.69	\$9.17	\$12.51
Accountants and Auditors	2,610	\$26.54	\$23.74	\$16.09	\$31.77
Stock Clerks and Order Fillers	2,230	\$11.67	\$10.92	\$9.26	\$12.88
Business Operations Specialists, All Other	2,200	\$31.76	\$29.95	\$19.60	\$37.83
Lawyers	2,200	\$48.28	\$37.74	\$25.57	\$59.63
Cooks, Restaurant	1,850	\$11.79	\$11.44	\$10.22	\$12.57
General and Operations Managers	1,740	\$60.11	\$53.24	\$30.93	\$74.71
Postsecondary Teachers, All Other	1,570	\$64,373	\$60,764	\$44,361	\$74,379
Bookkeeping, Accounting, and Auditing Clerks	1,510	\$17.06	\$16.72	\$12.22	\$19.49
First-Line Supervisors of Retail Sales Workers	1,500	\$20.82	\$18.12	\$14.83	\$23.82
Correctional Officers and Jailers	1,440	18.67	17.89	16.20	19.92
Maintenance and Repair Workers, General	1,420	\$15.53	\$15.24	\$11.02	\$17.78
Receptionists and Information Clerks	1,420	\$12.46	\$11.88	\$9.83	\$13.77
Compl. Officers, Exc. Ag., Const., Hlth., Safety, Transp.	1,400	\$18.27	\$16.67	\$13.53	\$20.62
Elementary School Teachers, Exc. Special Ed.	1,370	\$44,397	\$44,357	\$35,751	\$48,719
Teacher Assistants	1,360	\$27,165	\$26,422	\$21,535	\$29,981
First-Line Supervisors of Office and Admin. Support	1,340	\$25.48	\$23.42	\$17.06	\$29.68
First-Line Supervisors of Food Prep. and Serving Workers	1,290	\$17.83	\$16.89	\$12.13	\$20.68
Nursing Assistants	1,290	\$11.29	\$11.11	\$9.78	\$12.04
Computer Network Architects	1,240	\$27.59	\$25.52	\$20.13	\$31.32
Laborers and Freight, Stock, and Material Movers, Hand	1,240	\$11.59	\$11.14	\$9.61	\$12.59
Executive Secretaries and Executive Admin. Assistants	1,220	\$20.93	\$19.86	\$13.67	\$24.56
Maids and Housekeeping Cleaners	1,220	\$9.59	\$9.26	\$8.97	\$9.91



Workforce and Income
Occupational Employment and Wages
Occupations with Employment of 1,000+

Trend: The 2017 estimated average hourly wage for all occupations in the Tallahassee MSA is \$21.60, with an average wage of \$27.31 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2016	(2017 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Sales Representatives, Services, All Other	1,140	\$25.25	\$21.15	\$12.10	\$31.82
Landscaping and Groundskeeping Workers	1,130	\$12.21	\$11.03	\$9.52	\$13.55
Heavy and Tractor-Trailer Truck Drivers	1,060	\$17.79	\$16.75	\$13.15	\$20.10

* *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

Employment:

Major Employers* (2017)

Size	Employer	Industry
5,000+ employees	State of Florida	Government
	Florida State University	Education
2,000 to 4,999	Tallahassee Memorial Healthcare, Inc.	Healthcare
	Leon County Schools	Education
	City of Tallahassee	Government
1,000 to 1,999	Florida A&M University	Education
	Leon County	Government
	Tallahassee Community College	Education
	Capital Regional Medical Center	Healthcare
300 to 999	Capital City Bank Group	Finance & Insurance
	Mainline Information Systems	Information Technology
	Capital Health Plan	Healthcare
	Apalachee Center, Inc.	Healthcare
	Goodwill Industries - Big Bend	Social Services
	Westminster Oaks	Healthcare
	General Dynamics Land Systems	Manufacturing
	St. Marks Powder	Manufacturing
	Citizens Property Insurance Corporation	Business Services
	FBMC Benefits Management	Business Services
	The Florida Bar	Associations & Organizations
	Flagler College	Education
	VA Outpatient Clinic	Healthcare
	Big Bend Hospice	Healthcare
200 to 299	Florida Bar	Associations & Organizations
	Tallahassee Primary Care Associates	Healthcare
	Comcast Cable	Telecommunications
	HealthSouth Rehabilitation Hospital	Healthcare
	Tri-Eagle Sales	Transportation
	Danfoss Turbocor	Manufacturing
	GT Technologies	Manufacturing
	Radiology Associates	Healthcare
100 to 199	Syn-Tech Systems	Manufacturing
	BASF Catalysts	Manufacturing
	Tallahassee Orthopedic Clinic	Healthcare
	CenturyLink	Telecommunications
	Select Specialty Hospital	Healthcare
	Miracle Hill Nursing and Rehabilitation Center	Healthcare
	Heritage Health Care Center	Healthcare

Workforce and Income

Employment:

Major Employers* (2017)

Size	Employer	Industry
100 to 199 (Contd.)	First Commerce Credit Union	Finance & Insurance
	Consulate Health Care	Healthcare
	Culpepper Construction	Construction
	Capital Healthcare Center	Healthcare
	Seven Hills Health & Rehabilitation Center	Healthcare
	Datamaxx Group	Information Technology
	CSG Systems	Information Technology
	Centre Point Health and Rehab	Healthcare
	University Center Club	Leisure & Hospitality
	Municipal Code Corporation	Business Services
	Ajax Building Corporation	Construction
	Kaye Scholer LLP	Business Services
	Florida Coca-Cola Bottling Company	Transportation
	Chromalloy Component Services	Manufacturing
	URS Group	Business Services
	Figg Engineering Group	Business Services
	Image API	Business Services
	TeligentEMS	Manufacturing
	T-Formation	Manufacturing
	Tyco SimplexGrinnell	Business Services

**Excludes Retail Operations*

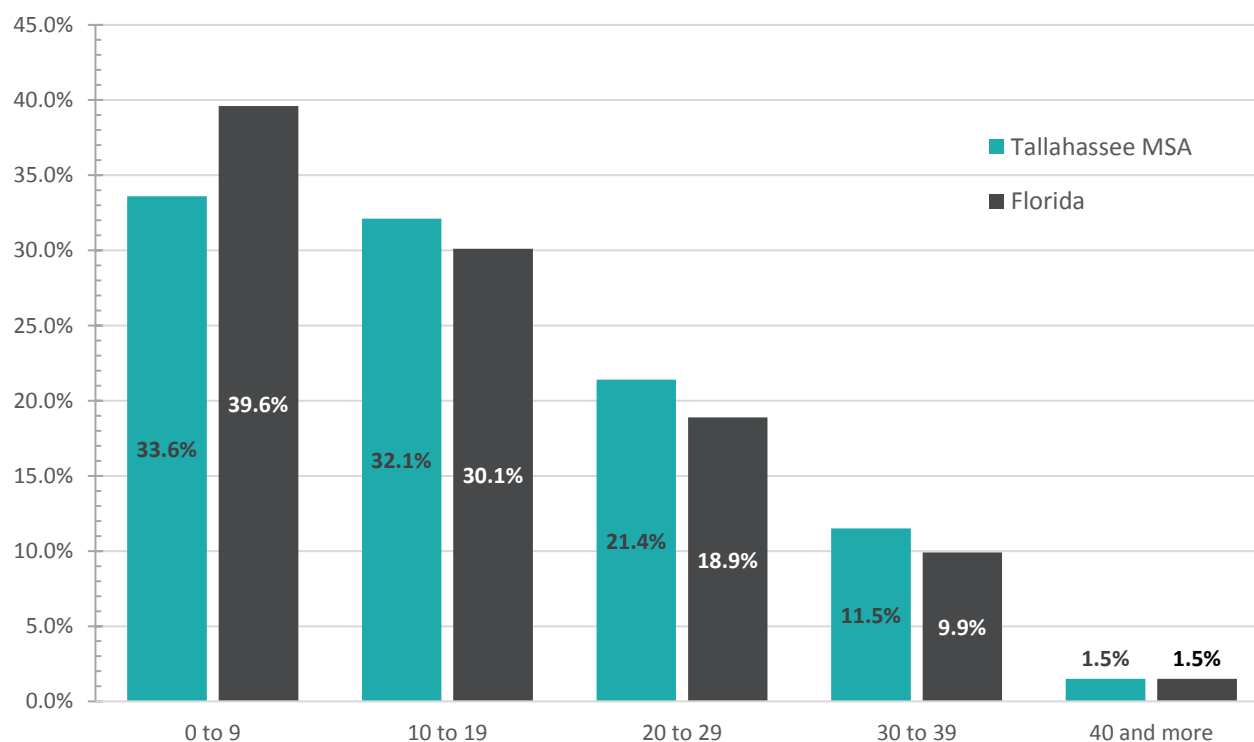
Trend: Professional Engineers (PEs) have an essential role in a community's economic development and redevelopment. Their education, experience, and professional obligations for protecting public health and safety place them in the vanguard of innovation for public infrastructure and private-sector development. Of the more than 600 active PEs in the Tallahassee MSA, 2/3 have ten years of experience or more, compared to 60% statewide.

Years Experience	Tallahassee MSA		Florida	
	Number	Percent	Number	Percent
0 to 9	205	33.6%	13,399	39.6%
10 to 19	196	32.1%	10,166	30.1%
20 to 29	131	21.4%	6,409	18.9%
30 to 39	70	11.5%	3,337	9.9%
40 and more	9	1.5%	517	1.5%
Total	611	100.0%	33,828	100.0%

Note: Percentages may not sum to 100.0% due to rounding. Professional Engineers current and active as of June 2017.

Source: Florida Department of Business and Professional Regulation

Professional Engineers in Tallahassee MSA and Florida, Years Licensed



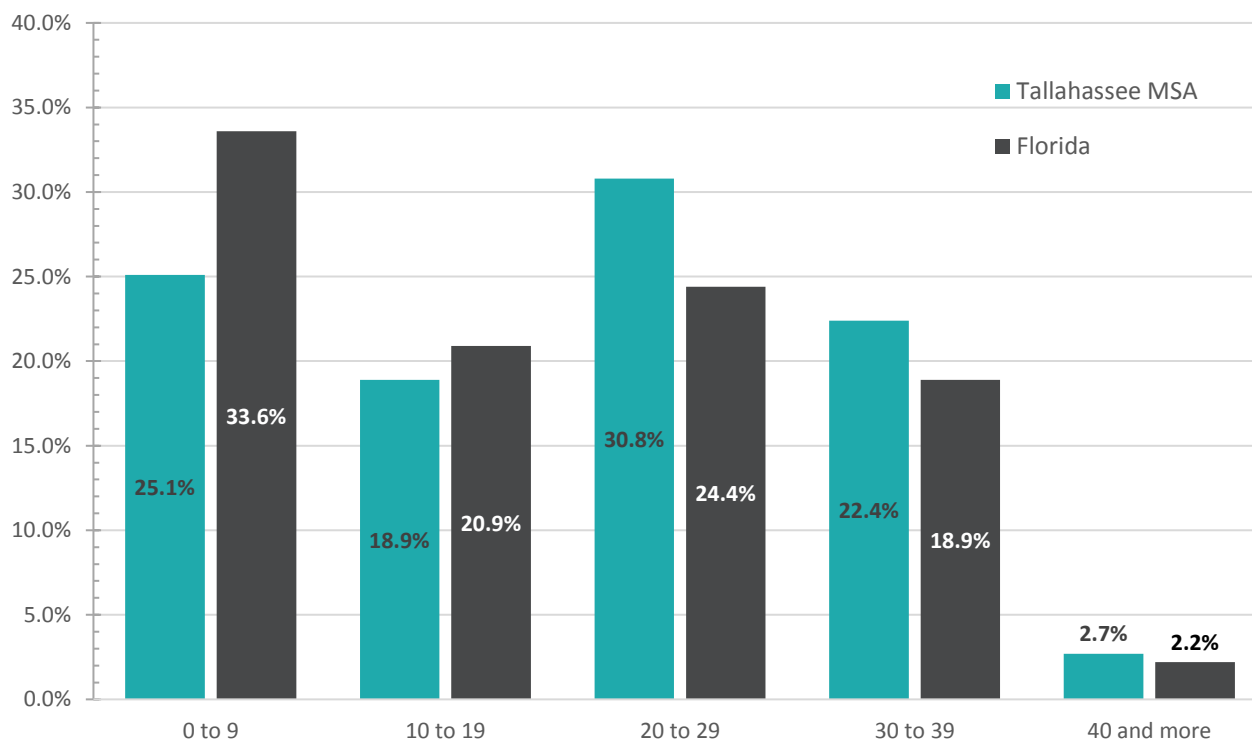
Trend: Certified Public Accountants (CPAs) analyze and plan how money is used by businesses, nonprofit organizations, governments, and individuals. CPAs perform vital functions in economic development by preparing financial statements, evaluating investments, performing cost analyses, and detecting fraud. Of the nearly 900 active CPAs in the Tallahassee MSA, 56% have 20 years of experience or more, compared to about 46% statewide.

Years Experience	Tallahassee MSA		Florida	
	Number	Percent	Number	Percent
0 to 9	220	25.1%	10,732	33.6%
10 to 19	166	18.9%	6,688	20.9%
20 to 29	270	30.8%	7,786	24.4%
30 to 39	196	22.4%	6,046	18.9%
40 and more	24	2.7%	695	2.2%
Total	876	100.0%	31,947	100.0%

Note: Percentages may not sum to 100.0% due to rounding. Certified Public Accountants current and active as of June 2017.

Source: Florida Department of Business and Professional Regulation

Certified Public Accountants in Tallahassee MSA and Florida, Years Licensed





Economic Factors

Real Gross Domestic Product by Metro Area

(\$ billions and percent change from previous year)

Trend: In 2016, the Tallahassee Metropolitan Area's (MSA) real gross domestic product was \$13.7 billion, up 4.3% from 2015. Real GDP in metropolitan areas increased 1.7% in 2016. Real GDP increased in 267 of the nation's 382 metropolitan areas in 2016 led by growth in professional and business services; information services; and finance, insurance, real estate, rental, and leasing.

Metro GDP (\$ billions, in chained 2009 dollars)

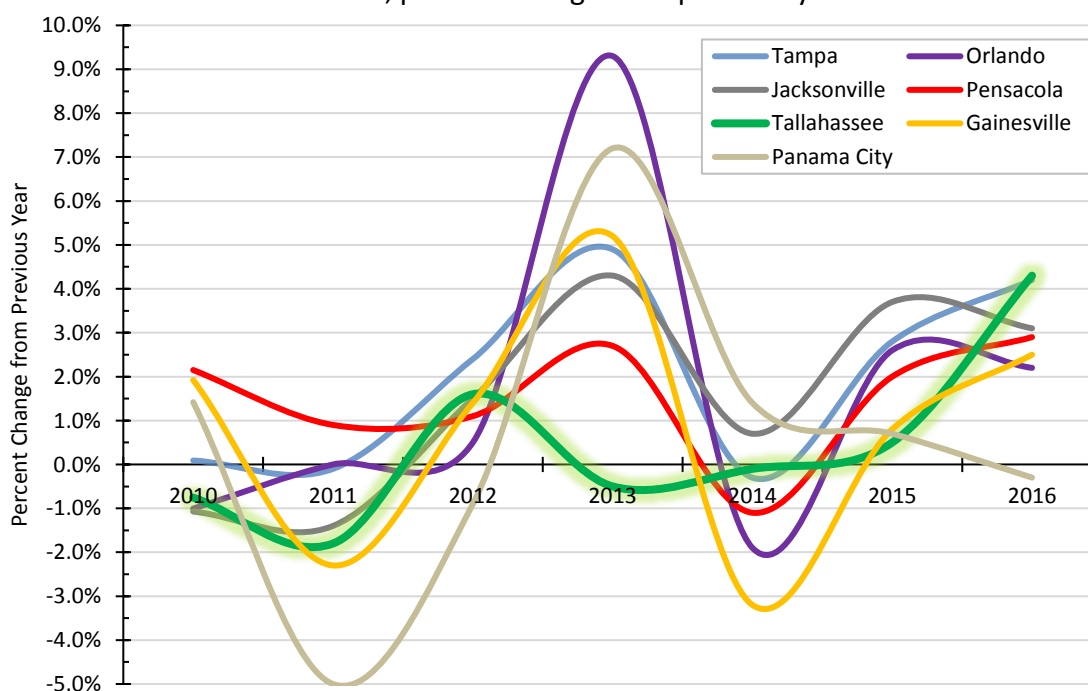
City	2010	2011	2012	2013	2014	2015	2016
Tampa	110.0	109.9	112.6	118.1	117.8	121.0	126.2
Orlando	98.9	98.9	99.4	108.7	106.5	109.3	111.8
Jacksonville	55.7	54.9	55.7	58.1	58.5	60.6	62.6
Pensacola	14.1	14.3	14.4	14.8	14.7	15.0	15.4
Tallahassee	13.2	13.0	13.2	13.1	13.1	13.2	13.7
Gainesville	10.5	10.3	10.4	11.0	10.6	10.7	11.0
Panama City	7.1	6.7	6.7	7.1	7.2	7.3	7.3

Percent Change from Previous Year

City	2010	2011	2012	2013	2014	2015	2016
Tampa	0.1%	-0.1%	2.4%	4.9%	-0.3%	2.8%	4.2%
Orlando	-1.0%	0.0%	0.5%	9.3%	-1.9%	2.6%	2.2%
Jacksonville	-1.1%	-1.4%	1.5%	4.3%	0.7%	3.7%	3.1%
Pensacola	2.2%	0.9%	1.1%	2.7%	-1.1%	2.0%	2.9%
Tallahassee	-0.8%	-1.8%	1.6%	-0.5%	-0.1%	0.5%	4.3%
Gainesville	1.9%	-2.3%	1.4%	5.2%	-3.2%	0.8%	2.5%
Panama City	1.4%	-5.0%	-0.9%	7.2%	1.4%	0.7%	-0.3%

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

Metro GDP, percent change from previous year





Economic Factors

Productivity

GDP per Private Sector Employee, Tallahassee MSA

Trend: The broadest proxy for Productivity in metropolitan areas is to measure the Gross Domestic Product (GDP) of private industries per private sector employee. GDP per employee is calculated by dividing GDP by total employment, in inflation-adjusted (chained 2009) dollars. Annual changes in productivity for the Tallahassee metro area have fluctuated between a low of -2.8% between 2013 and 2014 to a high of 2.7% from 2002 to 2003.

Year	Private Industries GDP (\$ millions)	Avg. Monthly Private Employment	Productivity (GDP per Private Sector Employee)	Productivity Change from Prior Year
2002	\$7,959	100,200	\$79,431	
2003	\$8,207	100,555	\$81,617	2.7%
2004	\$8,613	103,144	\$83,505	2.3%
2005	\$9,087	108,232	\$83,959	0.5%
2006	\$9,226	111,839	\$82,494	-1.8%
2007	\$9,440	111,874	\$84,381	2.3%
2008	\$9,239	109,337	\$84,500	0.1%
2009	\$8,770	103,644	\$84,617	0.1%
2010	\$8,591	101,517	\$84,626	0.0%
2011	\$8,492	101,474	\$83,686	-1.1%
2012	\$8,695	101,698	\$85,498	2.1%
2013	\$8,674	102,634	\$84,514	-1.2%
2014	\$8,704	105,913	\$82,181	-2.8%
2015	\$8,809	107,709	\$81,785	-0.5%
2016	\$9,298	111,894	\$83,097	1.6%

Sources: US Department of Commerce, Bureau of Economic Analysis; Florida Department of Economic Opportunity, Bureau of Labor Market Statistics.

Note: Dollar values expressed as chained 2009 dollars.

Productivity (GDP per Private Sector Employee)





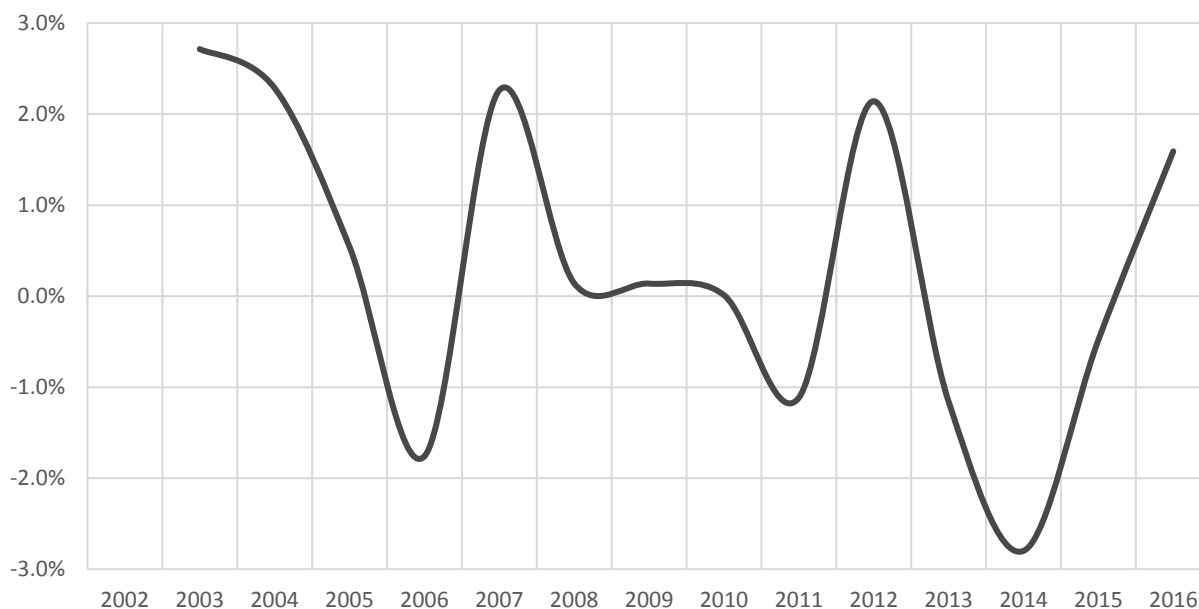
Economic Factors

Productivity

GDP per Private Sector Employee, Tallahassee MSA

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Productivity Change from Prior Year





Economic Factors

Exports from Tallahassee MSA

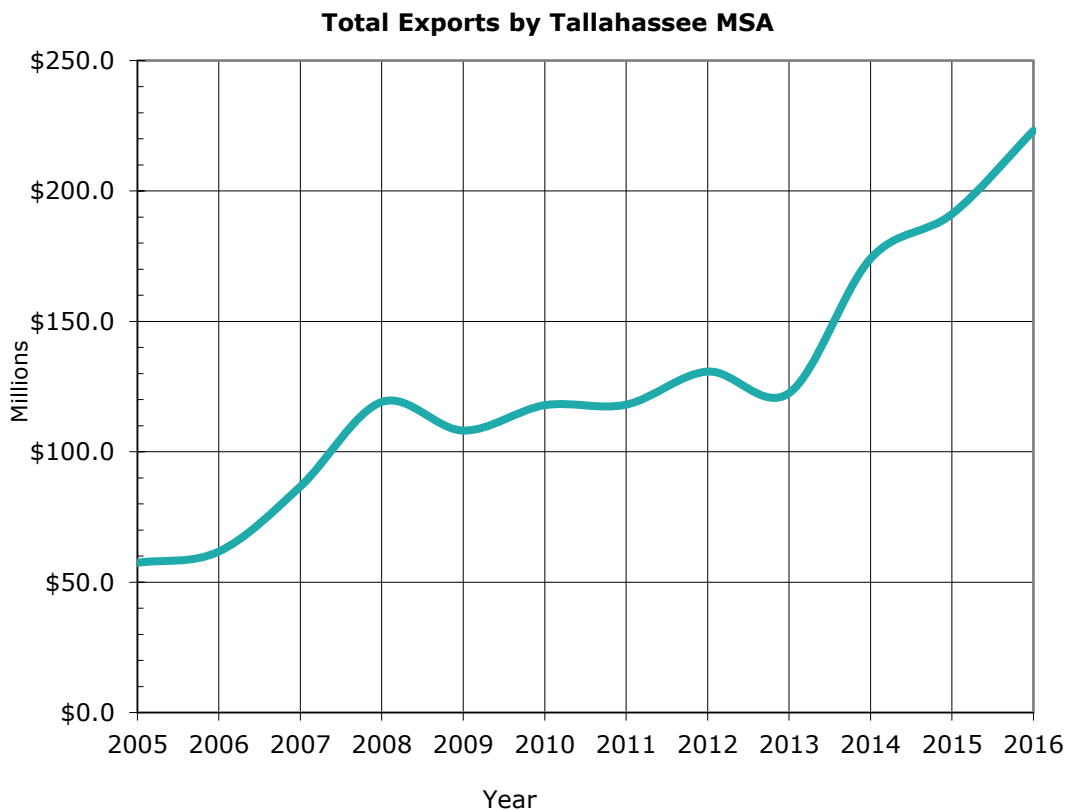
Total Merchandise Exports

Trend: Between 2005 and 2016, total merchandise exports from Tallahassee MSA nearly quadrupled, with an average annual growth rate around 14%. Tallahassee accounts for approximately 0.4% of Florida's total exports.

Year	Total Exports	% Change from Previous Year
2005	\$57,423,563	
2006	\$61,748,645	7.5%
2007	\$86,658,732	40.3%
2008	\$119,097,860	37.4%
2009	\$108,127,019	-9.2%
2010	\$117,844,974	9.0%
2011	\$118,059,725	0.2%
2012	\$130,752,507	10.8%
2013	\$122,502,739	-6.3%
2014	\$174,044,413	42.1%
2015	\$191,154,966	9.8%
2016	\$223,095,711	16.7%

Note: Current dollars, not adjusted for inflation.

Source: U.S. Department of Commerce, International Trade Administration, Office of Trade and Economic Analysis (OTEA)





Economic Factors

Airport Traffic Statistics

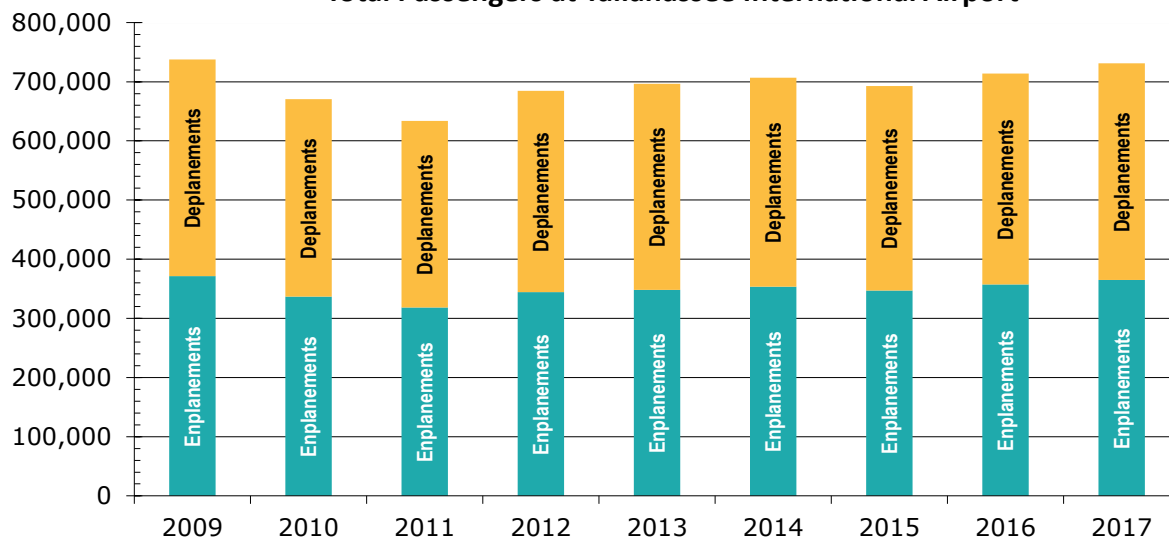
Total Passengers at TLH

Trend: Passenger traffic at Tallahassee International Airport increased 2.4% in 2017 from 2016 and was 7.1% higher than the 2010-2015 annual average of 680,846.

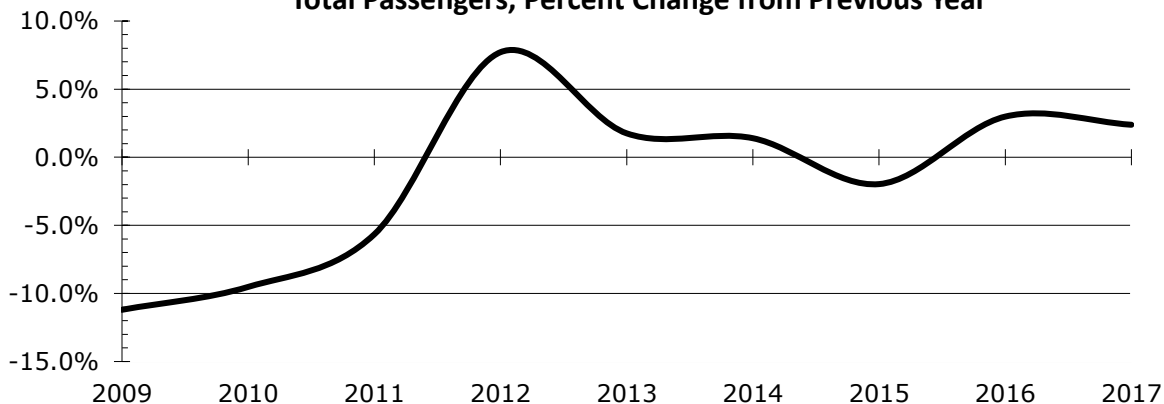
Year	Enplanements	Deplanements	Total Passengers	Percent Change from Previous Year
2009	371,106	366,579	737,685	-11.2%
2010	336,598	334,099	670,697	-9.5%
2011	318,172	315,619	633,791	-5.7%
2012	344,078	340,533	684,611	7.7%
2013	348,185	348,539	696,724	1.8%
2014	353,253	353,275	706,528	1.4%
2015	346,926	345,798	692,724	-2.0%
2016	357,392	356,306	713,698	3.0%
2017	364,997	365,922	730,919	2.4%

Source: Tallahassee International Airport

Total Passengers at Tallahassee International Airport



Total Passengers, Percent Change from Previous Year





Economic Factors

Leon County Tourism

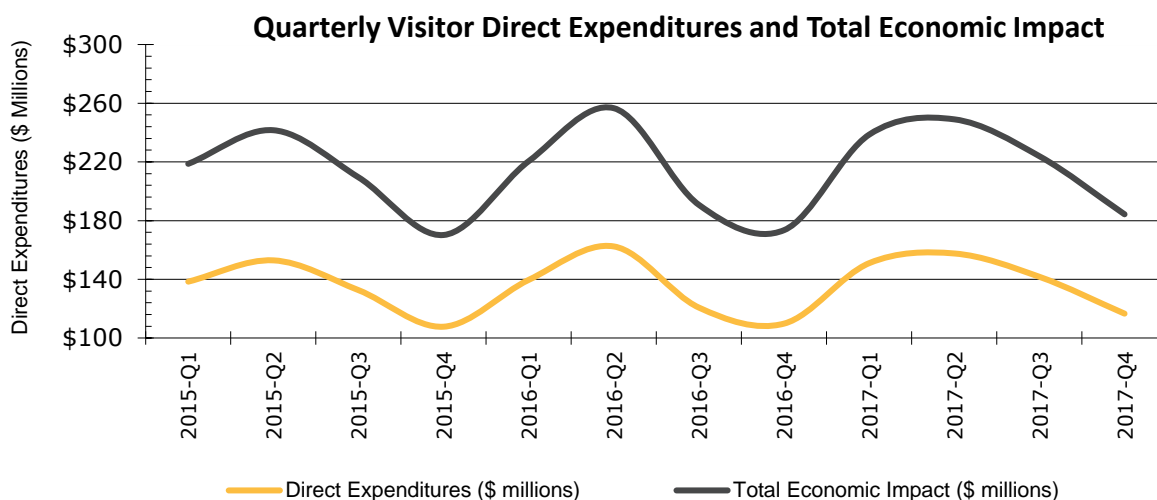
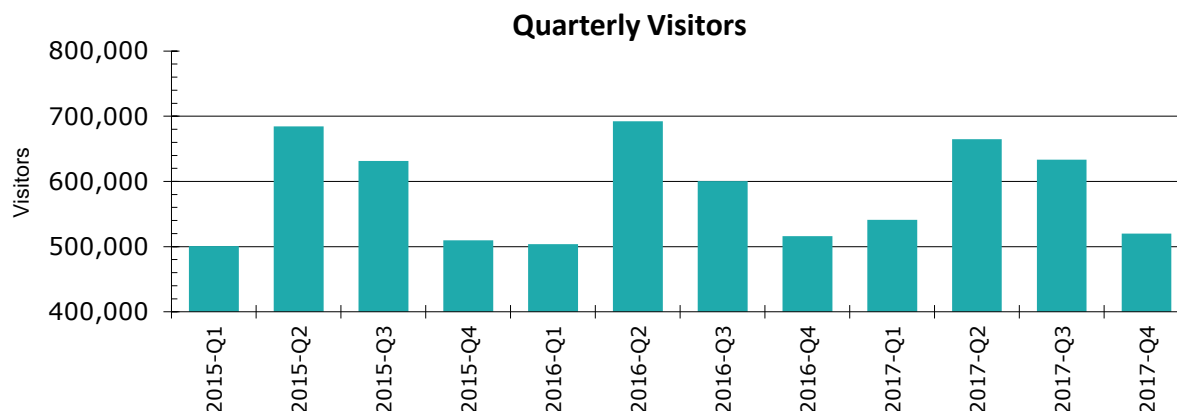
Person Visits, Visitor Spending and Economic Impact

Trend: In FY 2016, 2,358,833 visitors visited Leon County, up 2% from FY 2016. Direct expenditures of visitors amounted to \$567 million in FY 2017, an increase of 6.3% from FY 2016.

Fiscal Year & Quarter	Visitors	Direct Expenditures (\$ millions)	Total Economic Impact (\$ millions)
2015-Q1	500,741	\$138.4	\$218.7
2015-Q2	684,684	\$152.9	\$241.6
2015-Q3	631,639	\$132.6	\$209.5
2015-Q4	509,705	\$107.7	\$170.2
2016-Q1	503,580	\$139.6	\$220.5
2016-Q2	692,211	\$162.4	\$256.6
2016-Q3	600,528	\$120.7	\$190.7
2016-Q4	515,801	\$109.8	\$173.5
2017-Q1	540,981	\$151.0	\$238.6
2017-Q2	664,752	\$157.6	\$249.0
2017-Q3	633,319	\$141.7	\$223.9
2017-Q4	519,781	\$116.6	\$184.3

Note: Direct Expenditures includes spending for accommodations, restaurants, entertainment, shopping, transportation, groceries, and other expenses.

Source: Visit Tallahassee and Downs & St. Germain Research





Economic Factors

Taxable Sales:

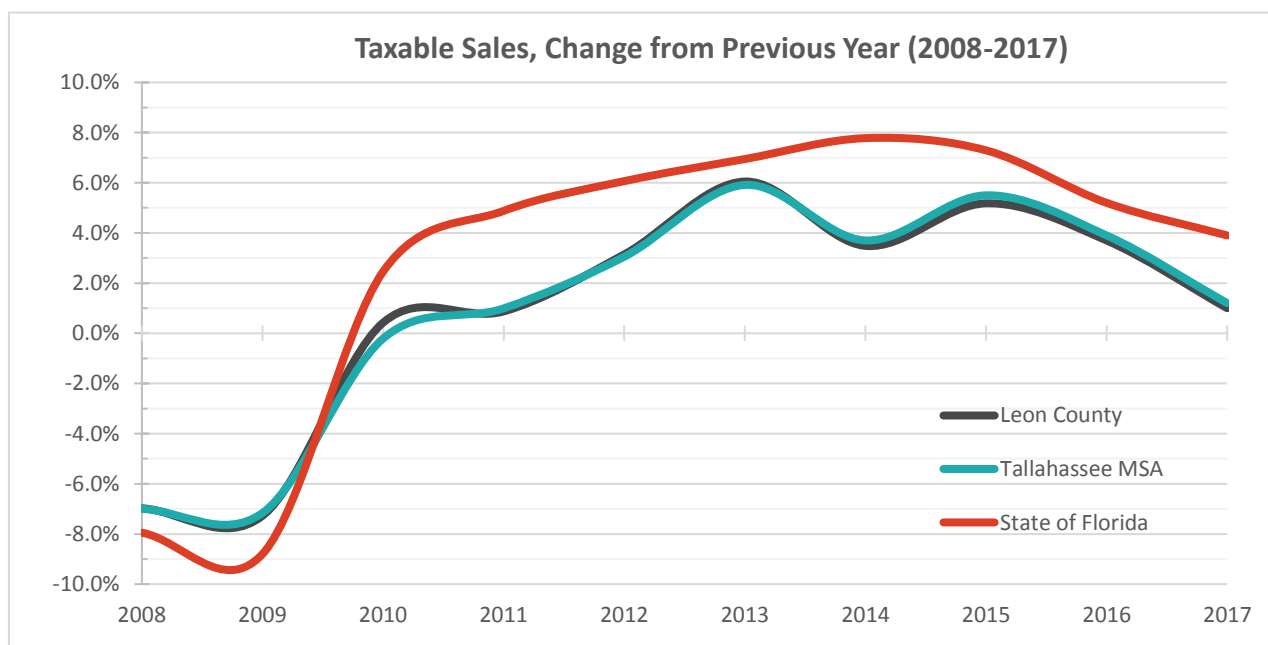
Annual Taxable Sales, Change from Previous Year

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. Sales tax is levied generally on sales of goods, but not services, although there are some taxable services. The overall level of taxable sales increased 1.2% in the Tallahassee MSA in 2017. Taxable sales for the State of Florida were up 3.9% in 2017 compared with 2016.

Year	Leon County	Previous Year	Tallahassee MSA	Previous Year	State of Florida	Previous Year
2008	\$3,596.8	-7.0%	\$4,087.9	-7.0%	\$303,001.0	-7.9%
2009	\$3,335.1	-7.3%	\$3,795.1	-7.2%	\$276,339.4	-8.8%
2010	\$3,349.2	0.4%	\$3,787.1	-0.2%	\$283,130.0	2.5%
2011	\$3,378.4	0.9%	\$3,824.7	1.0%	\$296,943.7	4.9%
2012	\$3,484.6	3.1%	\$3,941.4	3.1%	\$314,951.3	6.1%
2013	\$3,695.4	6.0%	\$4,174.5	5.9%	\$336,825.7	6.9%
2014	\$3,824.1	3.5%	\$4,329.1	3.7%	\$363,026.3	7.8%
2015	\$4,022.2	5.2%	\$4,566.1	5.5%	\$389,498.2	7.3%
2016	\$4,170.1	3.7%	\$4,743.9	3.9%	\$409,754.3	5.2%
2017	\$4,212.0	1.0%	\$4,802.3	1.2%	\$425,904.6	3.9%

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

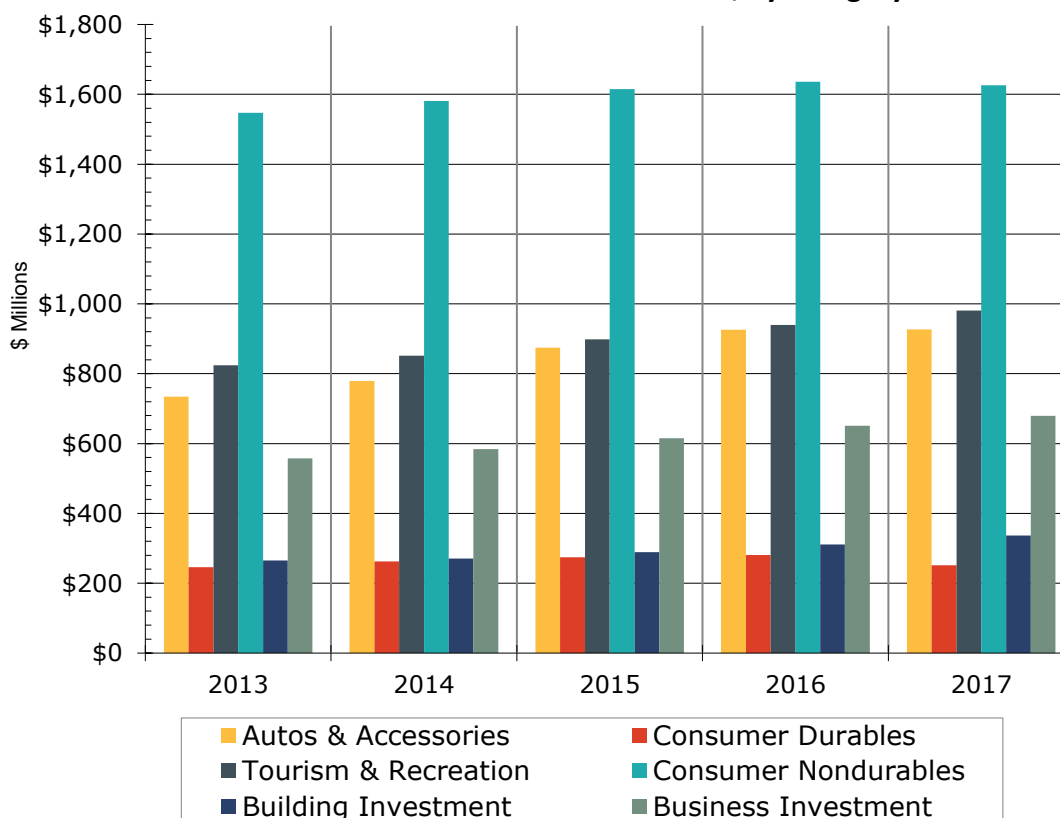
Trend: For the Tallahassee MSA, five of the six categories exhibited an increase in taxable sales each year between 2013 and 2017. Building Investment were up on average 6.2% each year; Autos & Accessories, 6.1%; Business Investment, 5.1%; Tourism & Recreation, 4.5%; Consumer Nondurables, 1.3%; Consumer Durables, 0.8%. It is estimated that taxable sales comprise 40-45% of all retail sales.

Category	2013	2014	2015	2016	2017
Autos & Accessories	\$734.7	\$778.9	\$874.3	\$925.5	\$926.6
Consumer Durables	\$246.1	\$262.1	\$274.3	\$280.5	\$251.5
Tourism & Recreation	\$824.1	\$852.0	\$898.7	\$939.7	\$981.2
Consumer Nondurables	\$1,546.9	\$1,581.0	\$1,615.1	\$1,636.1	\$1,626.3
Building Investment	\$265.1	\$271.0	\$288.7	\$310.9	\$337.0
Business Investment	\$557.6	\$584.2	\$615.1	\$651.3	\$679.7

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

Source: Florida Department of Revenue, Florida Office of Economic & Demographic Research

Annual Taxable Sales in Tallahassee MSA, by Category





Economic Factors

Consumer Price Index (CPI-U)

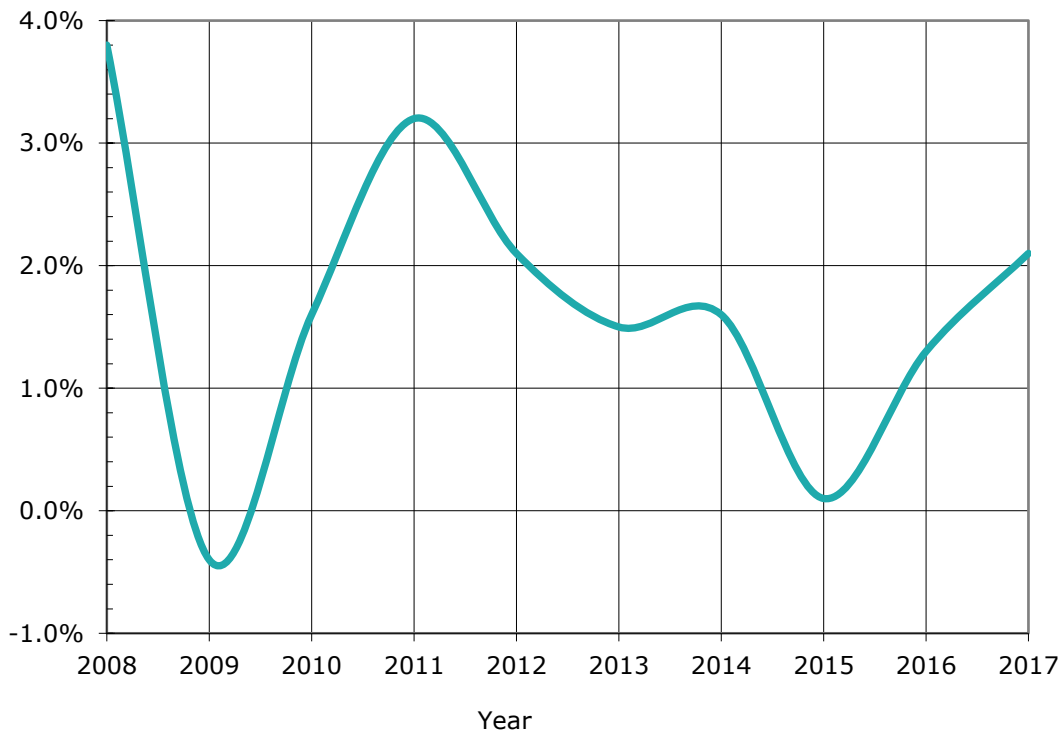
Annual Change in Consumer Price Index

Trend: The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 2.1% in 2017 following a 1.3% increase in 2016.

Year	U.S. City Average	% Change from Previous
2008	215.3	3.8%
2009	214.5	-0.4%
2010	218.1	1.6%
2011	224.9	3.2%
2012	229.6	2.1%
2013	233.0	1.5%
2014	236.7	1.6%
2015	237.0	0.1%
2016	240.0	1.3%
2017	245.1	2.1%

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

**Consumer Price Index - All Urban Consumers (CPI-U)
2008-2017**



Economic Factors

Bank Deposits:

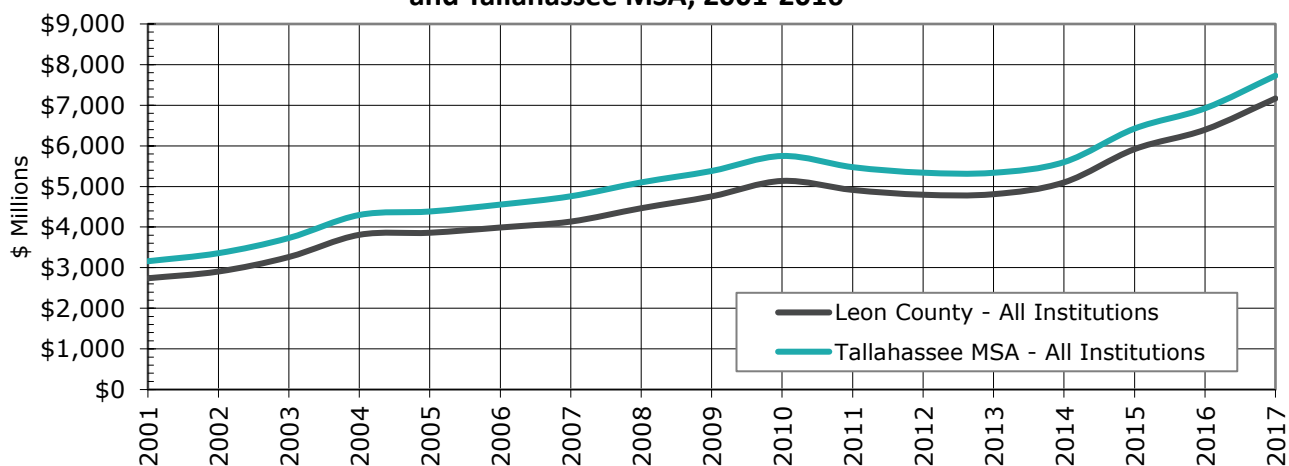
FDIC Summary of Deposits

Trend: Over \$7.1 billion in deposits were held in Leon County in FDIC-insured institutions as of June 30, 2017. Total Leon County deposits increased 11.4% between 2016 and 2017. 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 2001-2017, Leon County's bank deposits accounted for 1.1-1.3% of State total.

As of June 30	Leon County - All Institutions			Tallahassee MSA - All Institutions			Florida - All Institutions		
	Institutions	Offices	Deposits (\$ millions)	Institutions	Offices	Deposits (\$ millions)	Institutions	Offices	Deposits (\$ millions)
2001	13	68	\$2,740	15	86	\$3,159	349	4,667	\$222,797
2002	14	67	\$2,905	16	85	\$3,357	349	4,626	\$242,821
2003	14	69	\$3,263	16	86	\$3,731	352	4,732	\$268,174
2004	14	76	\$3,809	15	90	\$4,298	353	4,897	\$300,961
2005	14	80	\$3,860	15	95	\$4,383	349	5,081	\$342,821
2006	14	81	\$3,989	16	98	\$4,553	365	5,310	\$363,415
2007	14	83	\$4,135	16	100	\$4,758	376	5,600	\$373,711
2008	19	96	\$4,464	20	111	\$5,099	381	5,772	\$380,281
2009	20	96	\$4,755	21	111	\$5,381	368	5,820	\$400,979
2010	19	95	\$5,136	20	110	\$5,750	339	5,666	\$409,894
2011	18	92	\$4,914	18	105	\$5,475	313	5,616	\$411,157
2012	18	93	\$4,796	18	106	\$5,339	292	5,601	\$423,908
2013	17	82	\$4,809	17	93	\$5,336	281	5,548	\$441,108
2014	17	79	\$5,099	17	88	\$5,599	266	5,450	\$462,364
2015	18	78	\$5,918	18	87	\$6,424	253	5,388	\$502,930
2016	16	76	\$6,396	16	85	\$6,923	241	5,286	\$540,561
2017	16	75	\$7,166	16	84	\$7,727	226	5,139	\$563,994

Source: FDIC, Summary of Deposits

**FDIC Summary of Deposits, Leon County
and Tallahassee MSA, 2001-2016**



Economic Factors

C2ER Annual Cost of Living Index

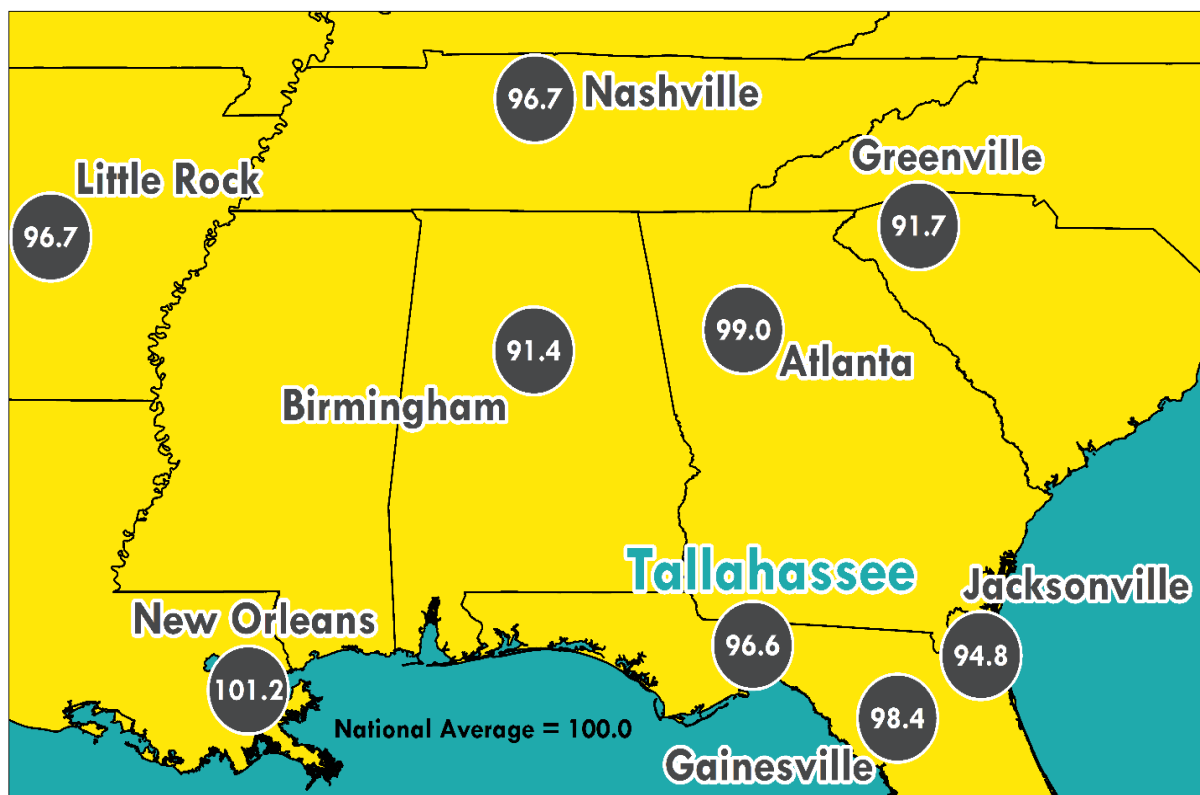
Trend: In 2017, the Tallahassee urban area captured an overall composite index of 96.6%, or 3.4% below the average cost of living for all participating urban areas.

The Annual Cost of Living Index (COLI) is released by the Council for Community and Economic Research (C2ER) to measure regional differences in the cost of consumer goods and services (like grocery items, healthcare, and housing), excluding taxes and non-consumer expenditures, for professional and managerial households in the top 20% of income. The index is based on more than 90,000 prices covering 60 different items for which prices are collected three times a year. This research tool allows OEV to make accurate cost of living comparisons between Tallahassee-Leon County and any of the 269 other participating urban areas across the United States.

Urban Area	All Items	Groceries	Housing	Utilities	Transportation	Healthcare	Misc. Goods & Services
Birmingham, AL	91.4	96.0	86.4	101.3	91.0	84.1	91.9
Greenville, SC	91.7	92.0	74.0	110.6	89.9	107.0	98.9
Jacksonville, FL	94.8	100.8	89.2	92.7	97.1	87.6	98.0
<i>Tallahassee, FL</i>	96.6	110.2	90.9	86.5	93.2	98.8	99.4
Little Rock, AR	96.7	94.3	89.1	117.2	91.6	93.6	99.7
Nashville, TN	96.7	97.3	91.1	90.4	100.3	81.9	103.9
Gainesville, FL	98.4	104.0	91.1	119.3	103.5	99.0	94.9
Atlanta, GA	99.0	105.6	94.4	85.8	101.0	107.9	102.1
New Orleans, LA	101.2	98.5	110.1	85.7	105.8	96.4	98.8

Source: Council for Community and Economic Research (C2ER)

2017 Cost of Living Index

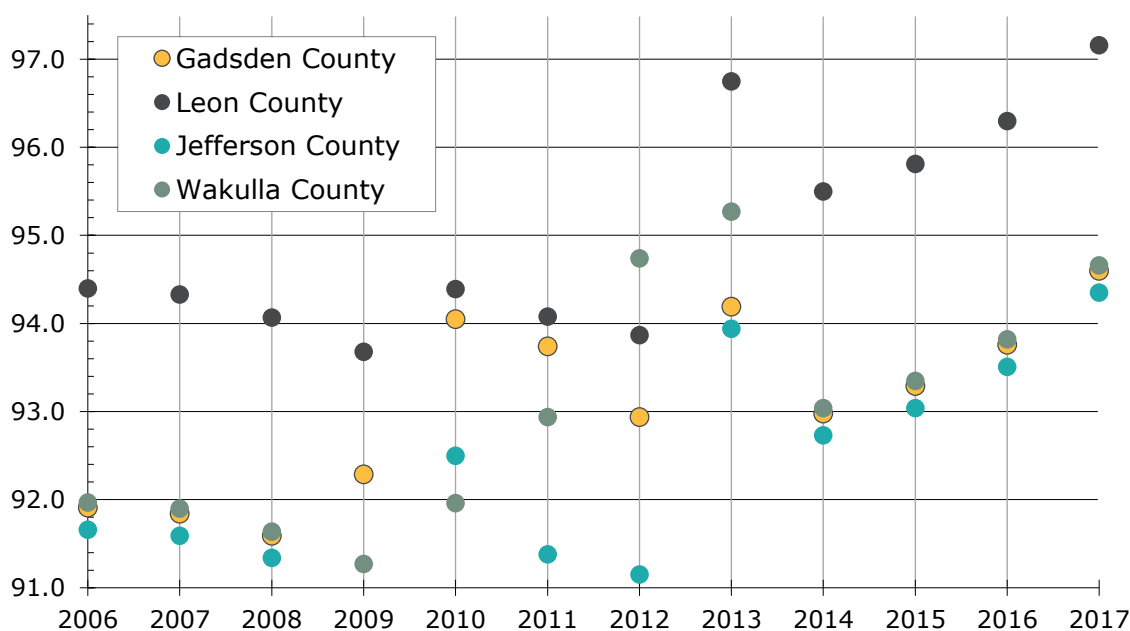


Trend: The Florida Price Level Index (FPLI) was established by the Legislature as the basis for the District Cost Differential (DCD) in the Florida Education Finance Program. It represents the costs of hiring comparable personnel across school districts. Extensive data on wages is used to estimate the relative cost of hiring comparable workers among Florida's 67 counties in a given year. The median Floridian, ranked by 2017 FPLI, lives in Hillsborough County with an index value of 100.66. In 2017, the ten counties with index values greater than 100.66 together accounted for 47.79% 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
2006	94.40	91.91	91.66	91.97
2007	94.33	91.84	91.59	91.90
2008	94.07	91.59	91.34	91.64
2009	93.68	92.29	90.97	91.27
2010	94.39	94.05	92.50	91.96
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
2016	96.30	93.76	93.51	93.82
2017	97.16	94.60	94.35	94.66

Source: Florida Department of Education, Funding & Financial Reporting; in collaboration with Florida Polytechnic University and University of Florida's Bureau of Economic and Business Research.

Florida Price Level Index, Four County Area (2006-2017)





Economic Factors

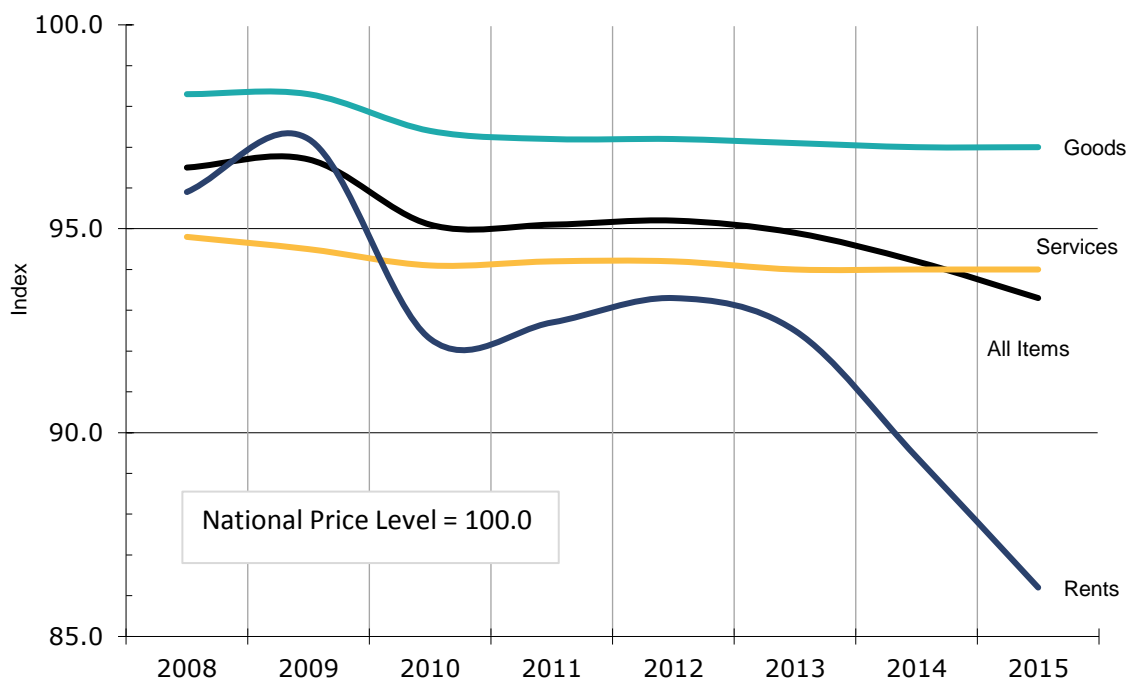
Regional Price Parities

Trend: Regional Price Parities (RPPs) are regional price levels expressed as a percentage of the overall national price level for a given year. The price levels are determined by the average prices paid by consumers for the mix of goods and services consumed in each region. Taking the ratio of RPPs shows the difference in price levels across regions. **All Items:** all the detailed consumption goods and services used to estimate the RPPs. **Goods:** durable and nondurable consumption goods used to estimate RPPs, including apparel, education, food, housing, medical, recreation, transportation, and other goods. **Services:** services consumption products (except rents) used to estimate RPPs, including education, food, housing, medical, recreation, transportation, and other services. **Rents:** estimated only for observed tenants' rents and do not include imputed owner-occupied rent values.

Year	All Items	Goods	Services	Rents
2008	96.5	98.3	94.8	95.9
2009	96.7	98.3	94.5	97.2
2010	95.1	97.4	94.1	92.3
2011	95.1	97.2	94.2	92.7
2012	95.2	97.2	94.2	93.3
2013	94.9	97.1	94.0	92.5
2014	94.2	97.0	94.0	89.4
2015	93.3	97.0	94.0	86.2

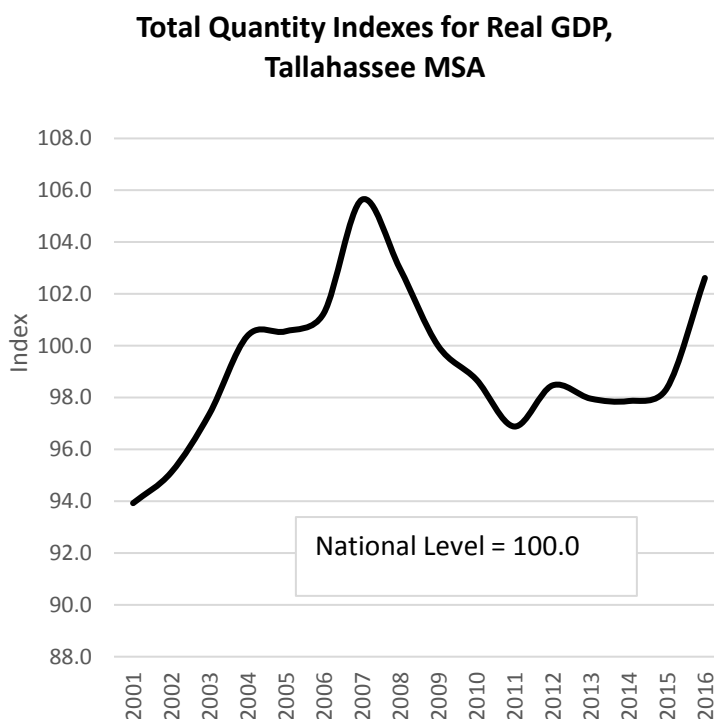
Source: U.S. Bureau of Economic Analysis, Regional Price Parities for Tallahassee MSA, retrieved from FRED, Federal Reserve Bank of St. Louis

Regional Price Parities for Tallahassee MSA



Trend: Total Quantity Indexes for Real GDP includes all Private Industries and Government. A chained-type index is based on the linking (chaining) of indexes to create a time series. These annual chained-type indices are used in BEA's national income and product accounts and calculated using the weights of adjacent years. Those annual changes are then multiplied (chained) together, forming the chained-type index time series. Chain-type indexes or chain-dollar estimates are used to show how output or spending changes over time.

Year	Indexes for Real GDP
2001	93.9
2002	95.1
2003	97.4
2004	100.4
2005	100.6
2006	101.2
2007	105.6
2008	103.0
2009	100.0
2010	98.7
2011	96.9
2012	98.5
2013	98.0
2014	97.9
2015	98.4
2016	102.6



Source: U.S. Bureau of Economic Analysis, *Regional Price Parities for Tallahassee MSA*, retrieved from FRED, Federal Reserve Bank of St. Louis



Economic Factors

Capital Accumulation

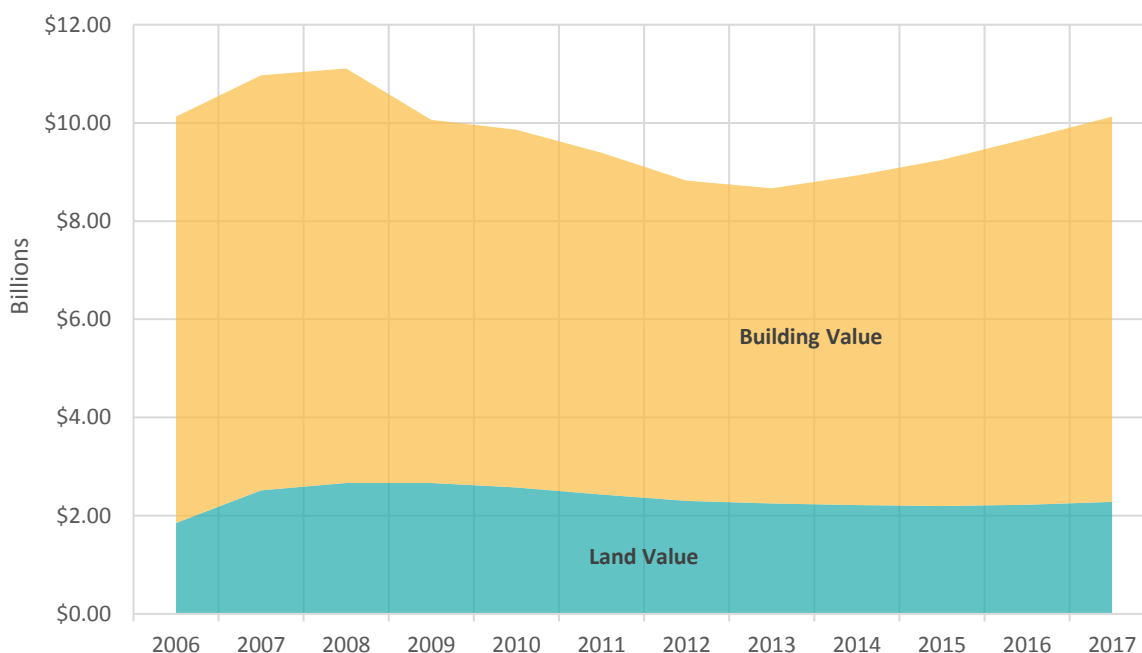
Homestead Exemption in Leon County

Trend: Residential property investment is a widespread method for local capital accumulation. During 2006-2017, acreage with homestead exemption averaged 60,919 acres, fluctuating only about 2% between minimum and maximum. Building value accounted for an average of 76% of total market value among homestead exempted properties. During 2006-2017, annual growth rates for total market value of homestead exempted properties ranged from -9.9% in 2008-2009 to 8% in 2006-2007.

Year	Parcel Count	Acreage	Land Value	Building Value	Land Market Value per Acre	Building Market Value per SF
2006	54,967	60,486	\$1,851,672,994	\$8,274,364,990	\$30,613	\$84.45
2007	55,587	60,623	\$2,515,510,028	\$8,454,289,940	\$41,494	\$86.12
2008	56,206	61,105	\$2,666,049,211	\$8,442,724,912	\$43,631	\$84.64
2009	56,764	61,650	\$2,663,566,747	\$7,400,639,158	\$43,205	\$73.06
2010	56,788	61,603	\$2,576,377,647	\$7,287,690,594	\$41,823	\$71.67
2011	56,380	61,329	\$2,429,721,470	\$6,959,833,893	\$39,618	\$68.64
2012	56,373	61,240	\$2,299,743,286	\$6,527,756,253	\$37,553	\$64.34
2013	55,241	60,769	\$2,247,368,293	\$6,421,880,871	\$36,982	\$64.06
2014	54,786	60,756	\$2,215,262,038	\$6,714,088,704	\$36,461	\$67.16
2015	54,664	60,359	\$2,197,852,457	\$7,050,109,027	\$36,413	\$70.40
2016	54,866	60,547	\$2,221,051,972	\$7,460,633,531	\$36,683	\$73.92
2017	55,253	60,566	\$2,283,914,247	\$7,842,917,686	\$37,709	\$76.99

Source: Leon County Property Appraiser, prepared by Tallahassee-Leon County Planning Department

Parcels with Homestead Exemption in Leon County: Total Market Value





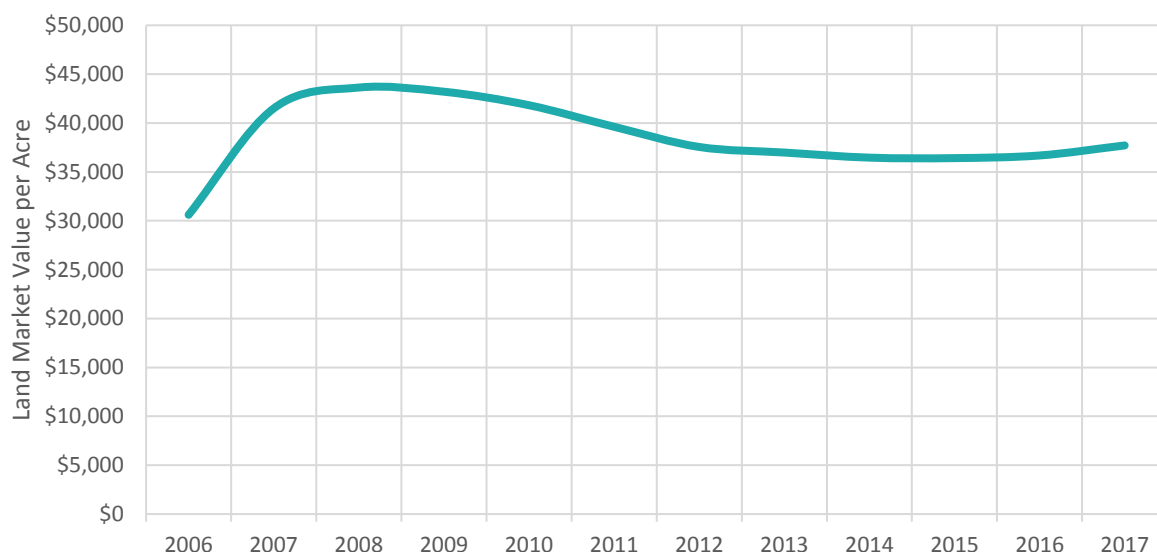
Economic Factors

Capital Accumulation

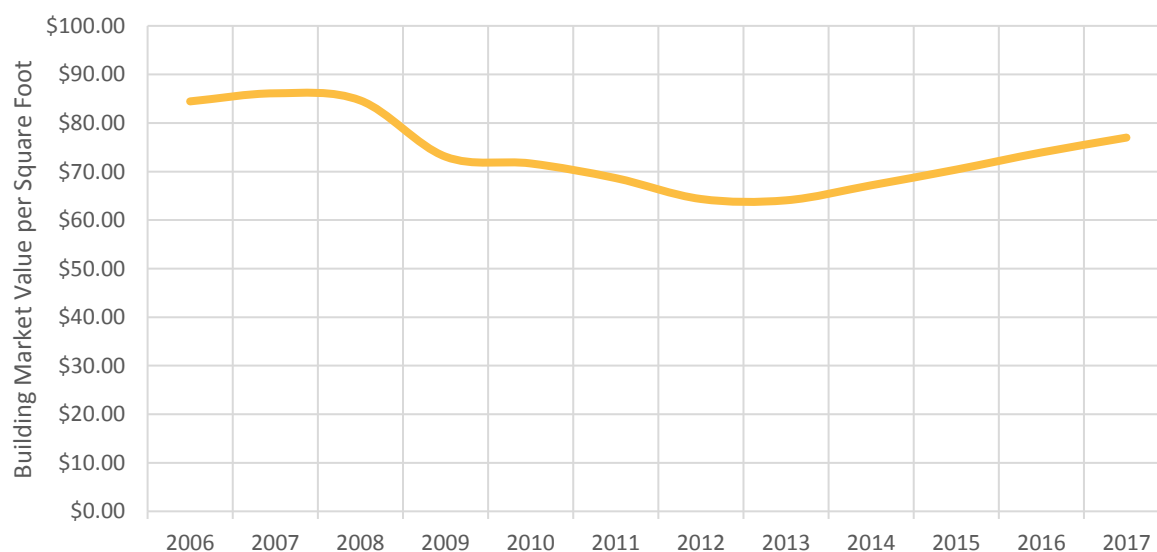
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Homestead Exemption Parcels in Leon County: Land Market Value per Acre



Homestead Exemption Parcels in Leon County: Building Market Value per Square Foot





Education

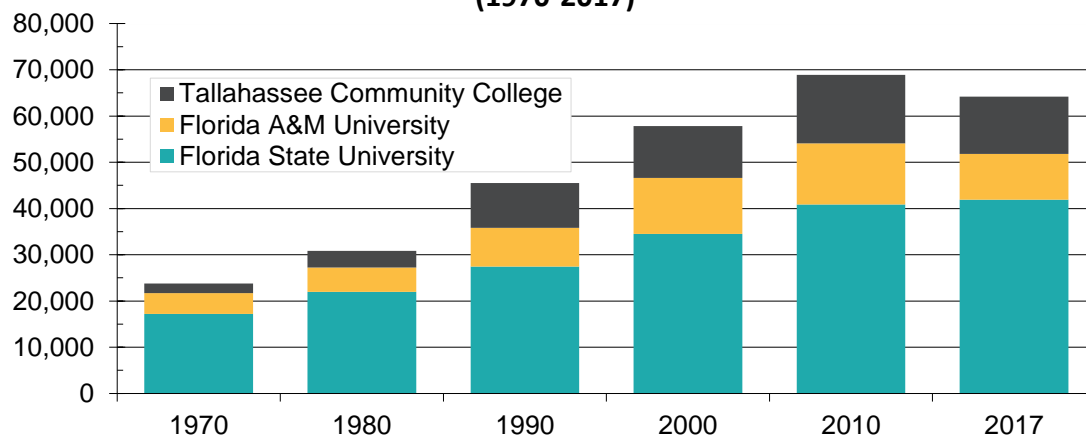
Higher Education Institutions: Enrollment

Trend: Combined enrollment for Florida State University, Florida A&M University, and Tallahassee Community College has stabilized after trending downward since 2012.

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	10,738	13,634	65,845
2014	41,773	10,233	13,045	65,047
2015	41,473	9,920	12,557	63,950
2016	41,867	9,614	12,500	63,981
2017	41,900	9,909	12,400	64,209

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 (1970-2017)





Education

Higher Education Institutions:

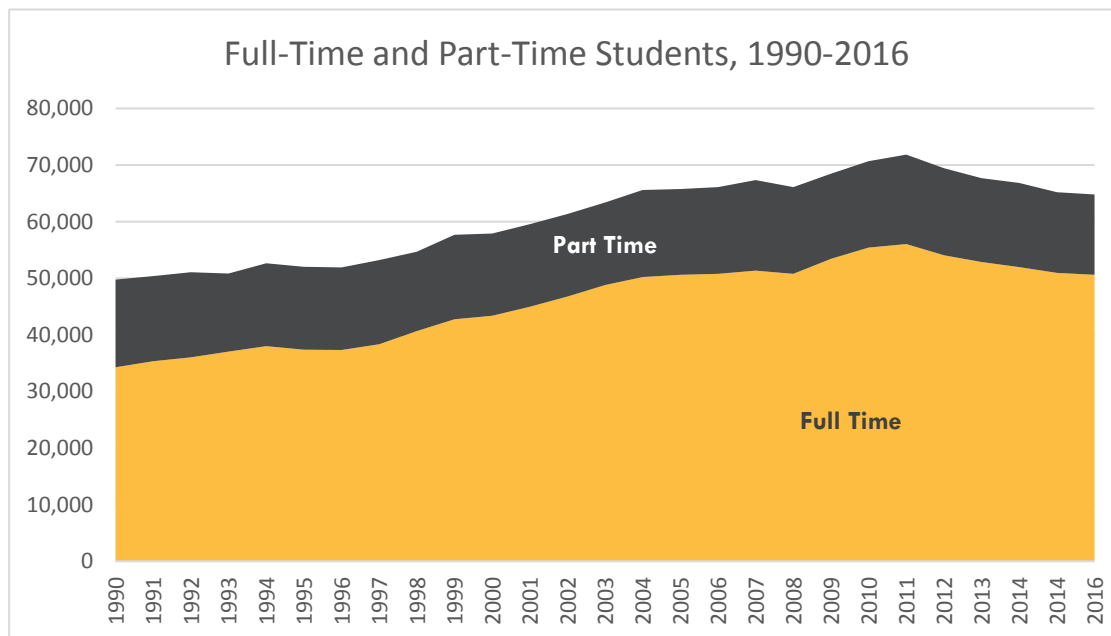
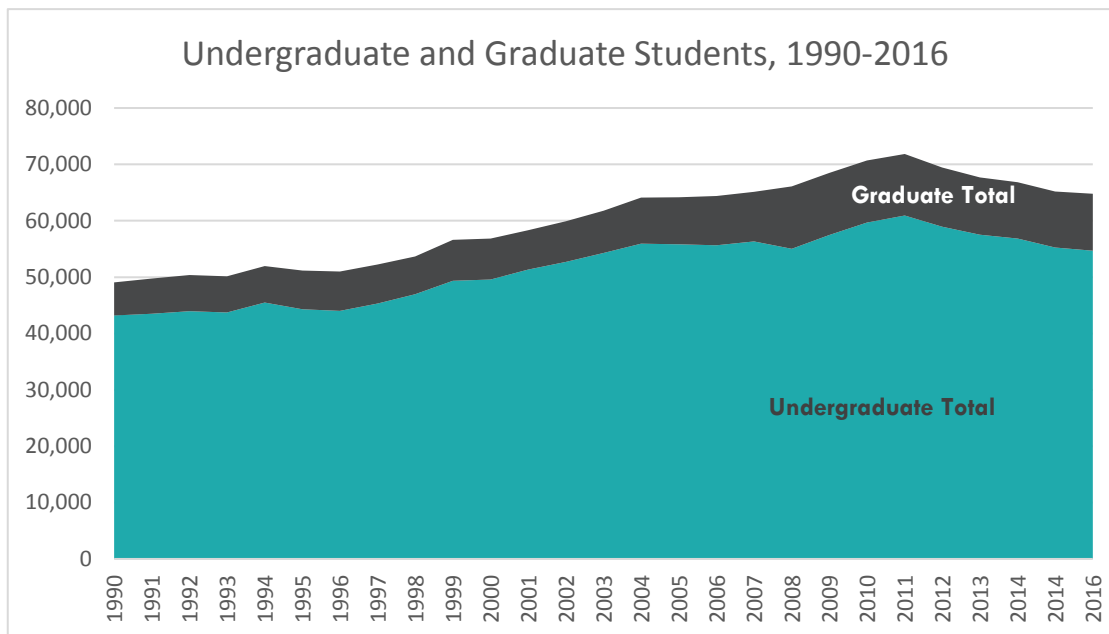
Enrollment by Level and Full-Time Status

Trend: Between 1990 and 2016, the proportion of full-time students rose from 69% to 78% of the total. The proportion of graduate students rose from 12% to 16% of the total during those same years.

Year	Undergraduate Total	Graduate Total	Full Time	Part Time
1990	43,192	5,882	34,270	15,478
1991	43,476	6,297	35,320	15,041
1992	43,947	6,413	36,012	15,041
1993	43,717	6,410	37,062	13,770
1994	45,470	6,465	38,016	14,614
1995	44,309	6,876	37,390	14,617
1996	44,013	6,993	37,330	14,569
1997	45,296	6,949	38,330	14,903
1998	46,991	6,649	40,686	14,013
1999	49,352	7,275	42,742	14,914
2000	49,554	7,287	43,364	14,559
2001	51,319	7,007	44,950	14,583
2002	52,669	7,260	46,753	14,592
2003	54,288	7,500	48,817	14,574
2004	55,909	8,204	50,229	15,355
2005	55,799	8,348	50,595	15,169
2006	55,669	8,727	50,773	15,305
2007	56,329	8,786	51,366	15,995
2008	54,999	11,074	50,751	15,322
2009	57,456	11,012	53,437	15,031
2010	59,707	10,993	55,400	15,300
2011	60,932	10,910	56,032	15,810
2012	58,917	10,528	54,040	15,405
2013	57,496	10,194	52,891	14,799
2014	56,828	10,024	51,937	14,915
2014	55,279	9,924	50,950	14,253
2016	54,699	10,090	50,598	14,191

Note: Includes Aveda Institute-Tallahassee, Flagler College-Tallahassee, Florida A&M University, Florida State University, ITT Technical Institute-Tallahassee, Lively Technical Center, and Tallahassee Community College.

Source: US Department of Education, Institute of Education Sciences, National Center for Education Statistics



Education

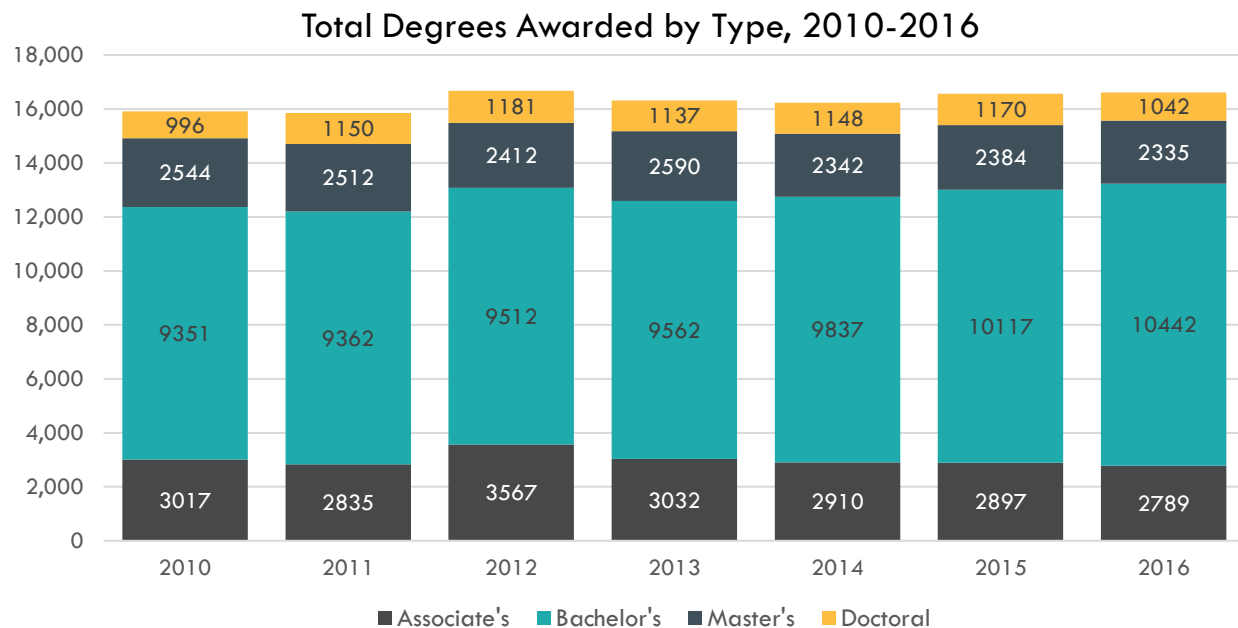
Higher Education Institutions: Degrees Conferred

Trend: Between 2010 and 2016, on average some 16,300 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	2015	2016
Flagler College-Tallahassee	Bachelor's	183	180	186	136	172	189	140
Florida A&M University	Associate's	47	67	59	102	113	67	54
	Bachelor's	1,242	1,296	1,466	1,488	1,560	1,507	1,676
	Master's	341	294	270	274	277	231	271
	Doctoral*	313	332	331	401	335	353	326
Florida State University	Associate's	98	111	163	133	192	177	192
	Bachelor's	7,926	7,886	7,860	7,938	8,105	8,421	8,626
	Master's	2,203	2,218	2,142	2,316	2,065	2,153	2,064
	Doctoral*	683	818	850	736	813	817	716
ITT Technical Institute-Tallahassee	Associate's	—	—	67	110	82	130	—
Tallahassee Community College	Associate's	2,872	2,657	3,278	2,687	2,523	2,523	2,543
Year Total		15,908	15,859	16,672	16,321	16,237	16,568	16,608

* Includes research/scholarship and professional practice degrees.

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





Education

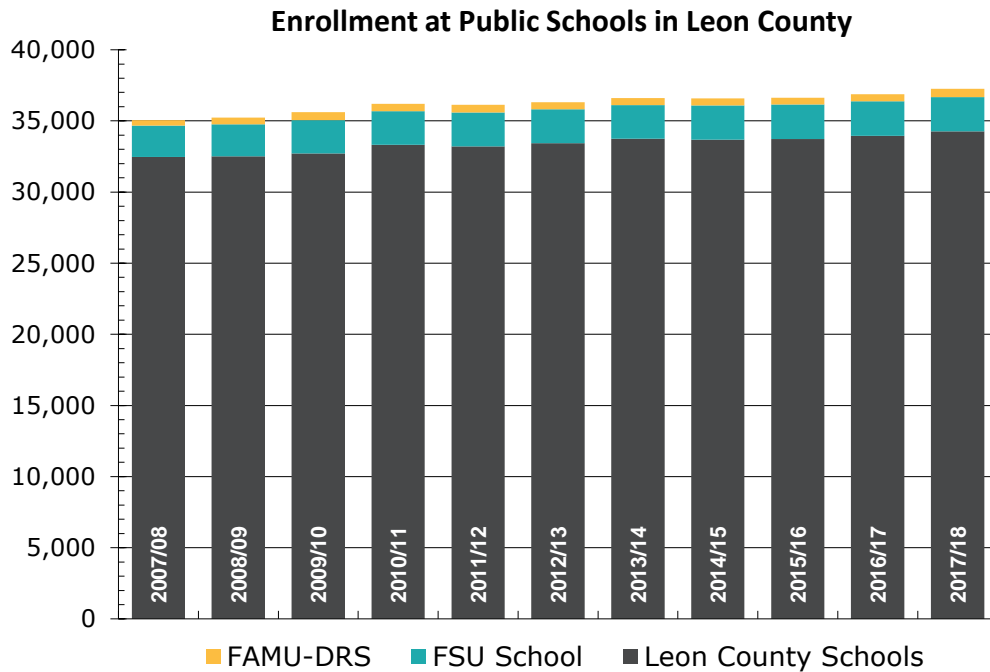
Public Schools: Enrollment

Trend: Public school enrollment has averaged around 36,200 over the past ten years, growing at an average annual rate of 0.6%.

Year	FAMU-DRS	FSU School	Leon County Schools	Public School Enrollment	Enrollment Change from Prior Year
2007/08	370	2,210	32,471	35,051	
2008/09	462	2,248	32,521	35,231	0.5%
2009/10	544	2,355	32,708	35,607	1.1%
2010/11	508	2,364	33,327	36,199	1.6%
2011/12	536	2,378	33,218	36,132	-0.2%
2012/13	499	2,381	33,432	36,312	0.5%
2013/14	486	2,370	33,747	36,603	0.8%
2014/15	482	2,411	33,681	36,574	-0.1%
2015/16	484	2,410	33,736	36,630	0.2%
2016/17	514	2,419	33,954	36,887	0.7%
2017/18	586	2,409	34,268	37,263	1.0%

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



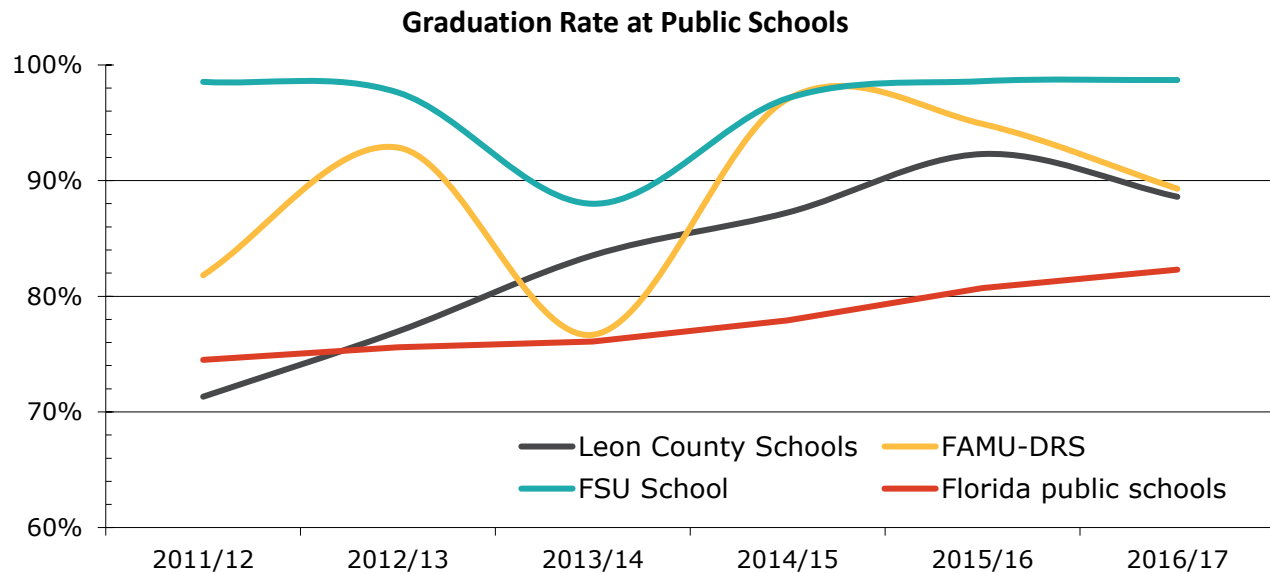
Education
Public Schools:
Graduation Rate

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	1,703	71.3%	27	81.8%	135	98.5%	141,954	74.5%
2012/13	1,577	77.0%	39	92.9%	164	97.6%	149,430	75.6%
2013/14	1,690	83.5%	23	76.7%	132	88.0%	149,397	76.1%
2014/15	1,791	87.2%	33	97.1%	135	97.1%	155,714	77.9%
2015/16	1,862	92.3%	37	94.9%	136	98.6%	159,672	80.7%
2016/17	1,978	88.6%	25	89.3%	149	98.7%	168,042	82.3%

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



Education

Public Schools:

School Grades

Trend: Between 2013 and 2017, more than half of all public schools in Leon County earned a grade of A or B.

School Name	2017 Grade	2016 Grade	2015 Grade	2014 Grade	2013 Grade	2012 Grade	2011 Grade	2010 Grade
Amos P. Godby High School	C	C	B	C	C	B	C	B
Apalachee Elementary School	C	C	C	B	C	D	C	C
Astoria Park Elementary School	C	D	D	C	C	B	A	A
Augusta Raa Middle School	B	B	B	A	C	B	A	A
Bond Elementary School	C	C	F	D	D	C	C	B
Buck Lake Elementary School	A	A	A	A	A	A	A	A
Canopy Oaks Elementary School	B	C	B	C	B	A	A	A
Chaires Elementary School	A	B	B	A	B	A	A	A
Deerlake Middle School	A	A	A	A	A	A	A	A
Desoto Trail Elementary School	A	A	A	A	A	A	A	A
Elizabeth Cobb Middle School	B	B	B	A	B	A	A	A
Fairview Middle School	C	B	A	B	B	B	B	A
FAMU-DRS*	C	B	C	C	C	D	C	C
FSU School*	A	A	A	A	A	A	A	A
Fort Braden Elementary School	C	C	C	B	C	C	B	C
Frank Hartsfield Elementary School	C	D	D	D	C	B	C	C
Gilchrist Elementary School	A	A	A	A	A	A	A	A
Governors Charter Academy	D	C	C	C	C			
Griffin Middle School	I	C	D	C	D	C	C	C
Hawks Rise Elementary School	A	A	A	A	A	A	A	A
Imagine School at Evening Rose	D	C	C	D	C	C	C	A
J. Michael Conley Elementary School	B	C	B	C	B	A	A	B
James Rickards High School	C	D	C	C	C	C	B	A
John G. Riley Elementary School	D	C	D	D	C	C	B	C
Kate Sullivan Elementary School	B	C	B	B	B	A	B	B

Education

Public Schools: School Grades

Trend: Between 2013 and 2017, more than half of all public schools in Leon County earned a grade of A or B.

School Name	2017 Grade	2016 Grade	2015 Grade	2014 Grade	2013 Grade	2012 Grade	2011 Grade	2010 Grade
Killearn Lakes Elementary School	A	A	A	A	A	A	A	A
Lawton Chiles High School	A	A	A	A	A	A	A	A
Leon High School	A	B	A	B	B	A	B	B
Lillian Ruediger Elementary School	C	C	D	C	C	B	C	C
Lincoln High School	B	C	A	A	B	A	B	A
Oak Ridge Elementary School	D	D	F	C	D	C	B	C
Pineview Elementary School	C	D	C	C	C	B	C	A
R. Frank Nims Middle School	C	D	D	C	D	D	C	F
Roberts Elementary School	A	A	A	A	A	A	B	A
Sabal Palm Elementary School	C	C	D	D	C	C	B	B
SAIL	B	B	A	A	A	A	A	B
School of Arts & Science Center	A							
Sealey Elementary School	C	B	B	C	B	A	B	B
Springwood Elementary School	C	C	C	B	C	C	B	C
Swift Creek Middle School	A	A	A	A	A	A	A	A
Tallahassee School of Math & Science	B	C						
The School of Arts & Sciences	A	A	A	A	A	A	A	A
Walter T. Moore Jr. Elementary School	B	C	B	B	B	A	B	A
William J. Montford III Middle School	A	A	A	A	A	A	A	A
Woodville Elementary School	C	A	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

Education

Higher Education Institutions: Graduation Rate

Trend: During 2010-2016, an average of nearly 6,500 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, 6 years for a 4-year degree) varied among institutions.

Completions

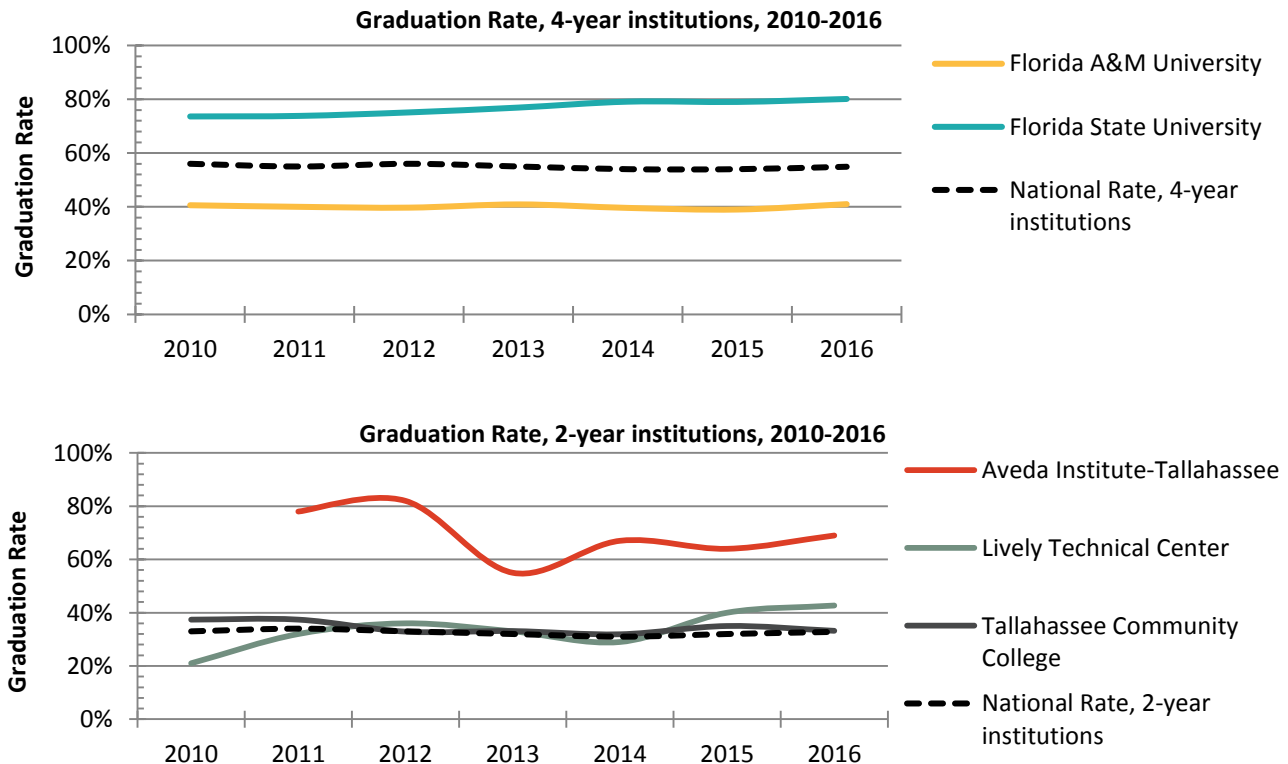
School	2010	2011	2012	2013	2014	2015	2016
Aveda Institute-Tallahassee	-	35	69	93	46	67	100
Florida A&M University	855	655	641	759	827	913	1,108
Florida State University	4,559	4,469	4,651	4,697	3,951	4,704	4,769
Lively Technical Center	151	253	368	288	233	250	256
Tallahassee Community College	771	882	827	838	801	733	838
Year Total	6,336	6,294	6,556	6,675	5,858	6,667	7,071

Graduation Rate*

School	2010	2011	2012	2013	2014	2015	2016
Aveda Institute-Tallahassee		78%	82%	55%	67%	64%	69%
Florida A&M University	41%	40%	40%	41%	40%	39%	41%
Florida State University	74%	74%	75%	77%	79%	79%	80%
Lively Technical Center	21%	32%	36%	33%	29%	40%	43%
Tallahassee Community College	37%	37%	33%	33%	32%	35%	33%
National Rate, 4-year institutions	56%	55%	56%	55%	54%	54%	55%
National Rate, 2-year institutions	33%	34%	33%	32%	31%	32%	33%

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

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





Education

Higher Education:

Financial Aid Received by Undergraduate Students*

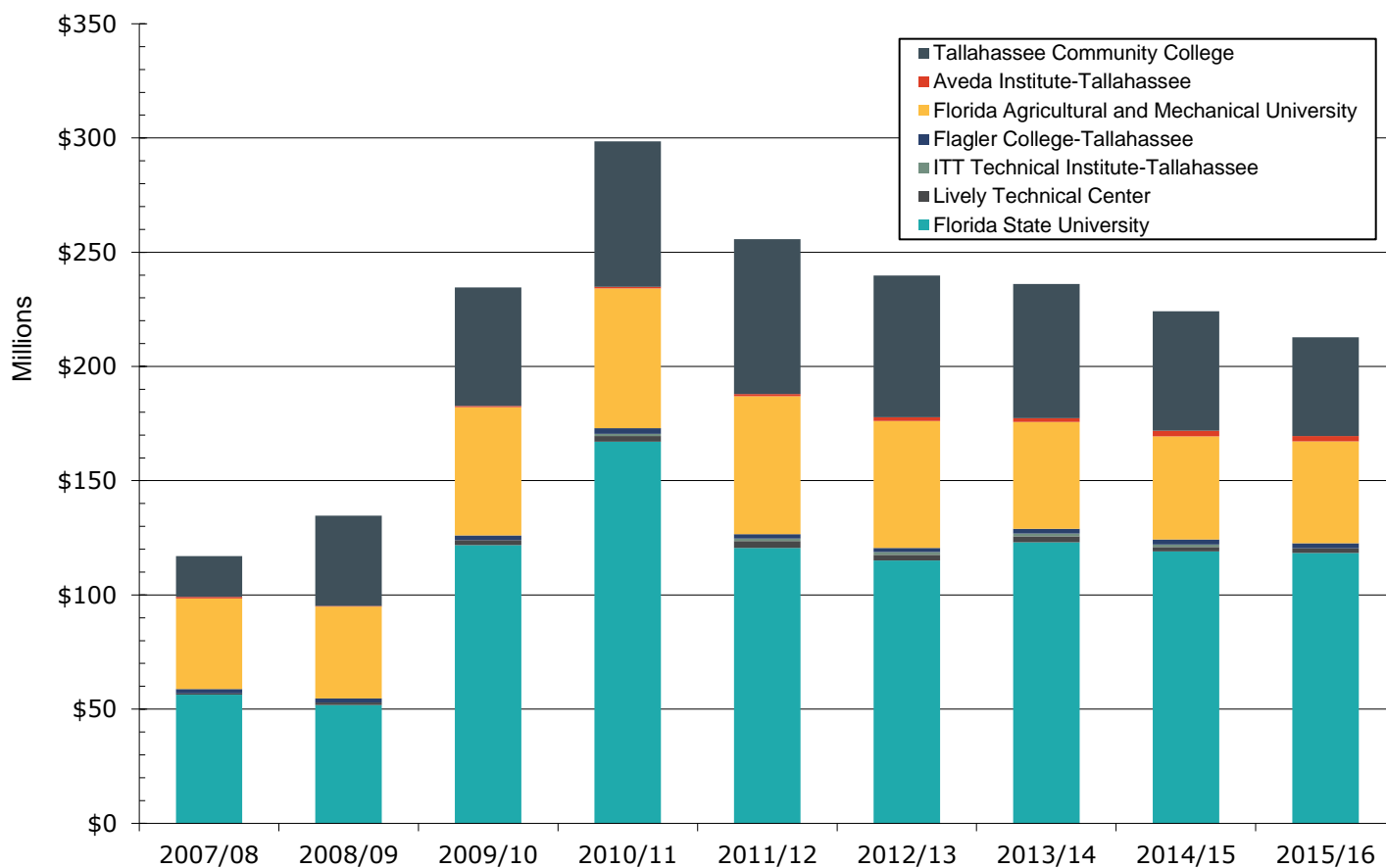
Trend: During 2011/12 to 2015/16, financial aid received by undergraduate students from all sources averaged \$233.7 million per year. FSU accounted for approximately 51%; TCC, 24%; FAMU, 22%; and other institutions, <3%.

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
2007/08	\$786,576	\$1,923,824	\$39,563,479	\$56,345,939		\$564,206	\$17,761,543
2008/09	\$234,404	\$1,722,429	\$40,255,788	\$51,822,807		\$1,142,554	\$39,544,213
2009/10	\$512,912	\$2,083,545	\$56,106,756	\$121,786,193		\$2,177,128	\$51,977,206
2010/11	\$583,863	\$2,445,680	\$61,302,528	\$167,123,605	\$979,357	\$2,361,961	\$63,807,067
2011/12	\$945,208	\$1,927,117	\$60,314,634	\$120,579,251	\$1,121,278	\$3,025,807	\$67,806,333
2012/13	\$1,626,372	\$1,825,064	\$55,546,343	\$115,087,913	\$1,194,084	\$2,498,158	\$62,066,585
2013/14	\$1,657,550	\$2,058,865	\$46,713,045	\$122,996,264	\$1,275,123	\$2,623,416	\$58,782,304
2014/15	\$2,365,607	\$2,168,252	\$45,145,262	\$119,003,105	\$1,125,465	\$2,001,611	\$52,336,809
2015/16	\$2,379,553	\$2,096,701	\$44,630,406	\$118,354,885		\$2,124,311	\$43,240,308

*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



Trend: Since 1987, over \$1.26 billion has gone towards educational institutions in the Tallahassee MSA from the Florida Lottery, with universities accounting for almost 73% and K-12 Grades accounting for around 17%. Leon County accounted for almost 95% of contributions to the Tallahassee MSA. Funding levels are determined by the Florida Legislature and Florida Department of Education.

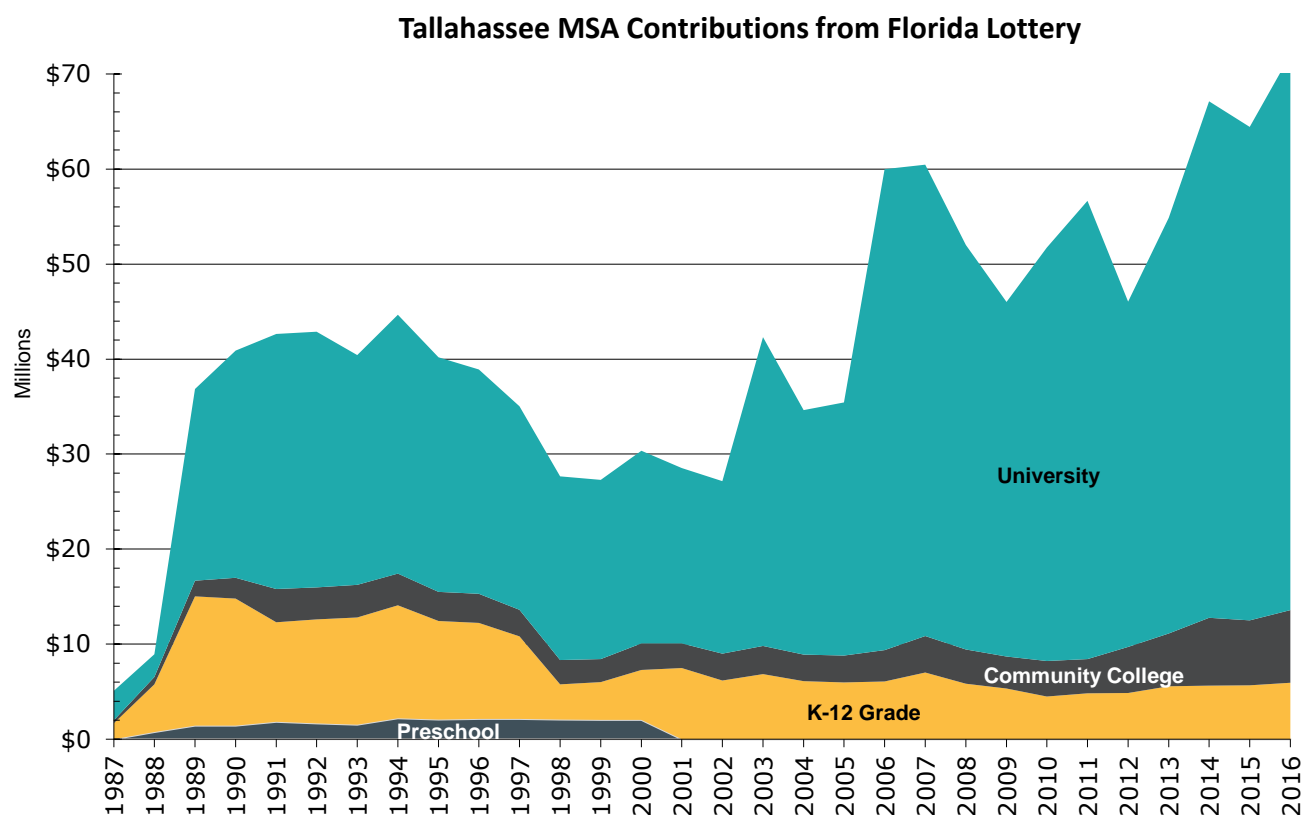
Fall Year	Contributions to County				Contributions by School Level			
	Gadsden	Jefferson	Leon	Wakulla	Preschool	K-12 Grade	Community College	University
1987	\$309,186	\$87,536	\$4,574,423	\$114,178	\$0	\$1,682,411	\$314,406	\$3,088,506
1988	\$1,233,498	\$358,387	\$6,894,949	\$440,144	\$739,555	\$5,016,869	\$787,328	\$2,383,226
1989	\$3,096,597	\$881,714	\$31,721,153	\$1,144,188	\$1,413,003	\$13,630,818	\$1,641,943	\$20,157,888
1990	\$3,044,345	\$848,406	\$35,870,123	\$1,124,526	\$1,432,789	\$13,346,787	\$2,208,309	\$23,899,515
1991	\$2,460,246	\$683,680	\$38,553,921	\$957,692	\$1,838,753	\$10,464,490	\$3,490,349	\$26,861,947
1992	\$2,418,834	\$664,911	\$38,833,855	\$971,900	\$1,670,878	\$10,943,253	\$3,367,099	\$26,908,270
1993	\$2,327,236	\$644,493	\$36,419,667	\$1,021,561	\$1,537,377	\$11,277,782	\$3,424,929	\$24,172,869
1994	\$2,580,484	\$711,385	\$40,212,177	\$1,169,511	\$2,201,302	\$11,887,703	\$3,343,082	\$27,241,470
1995	\$2,288,231	\$641,026	\$36,222,023	\$1,026,842	\$2,080,729	\$10,370,602	\$3,051,000	\$24,675,791
1996	\$2,192,351	\$602,784	\$35,087,459	\$1,040,057	\$2,149,161	\$10,071,819	\$3,086,319	\$23,615,352
1997	\$2,001,597	\$561,264	\$31,488,428	\$966,193	\$2,151,547	\$8,666,837	\$2,793,939	\$21,405,159
1998	\$1,176,087	\$338,183	\$25,607,789	\$544,920	\$2,069,269	\$3,716,817	\$2,529,728	\$19,351,165
1999	\$1,107,769	\$306,788	\$25,292,905	\$575,590	\$2,048,116	\$3,959,731	\$2,434,320	\$18,840,885
2000	\$1,271,810	\$319,454	\$28,131,536	\$641,926	\$2,047,854	\$5,223,314	\$2,798,730	\$20,294,828
2001	\$958,297	\$285,456	\$26,583,745	\$712,423	\$0	\$7,499,616	\$2,593,001	\$18,447,304
2002	\$747,957	\$232,671	\$25,592,332	\$584,511	\$0	\$6,163,880	\$2,849,170	\$18,144,421
2003	\$797,664	\$201,719	\$40,656,570	\$656,608	\$0	\$6,848,784	\$2,979,384	\$32,484,393
2004	\$571,407	\$112,673	\$33,229,356	\$718,074	\$0	\$6,114,628	\$2,776,914	\$25,739,968
2005	\$830,723	\$147,955	\$33,827,626	\$629,080	\$0	\$5,969,216	\$2,838,310	\$26,627,858
2006	\$633,918	\$156,598	\$58,705,442	\$506,288	\$0	\$6,071,255	\$3,293,913	\$50,637,078
2007	\$691,950	\$135,189	\$58,667,398	\$971,618	\$0	\$7,022,115	\$3,850,374	\$49,593,666
2008	\$750,702	\$73,162	\$50,566,575	\$600,657	\$0	\$5,842,797	\$3,607,267	\$42,541,032
2009	\$624,821	\$119,247	\$44,683,308	\$593,753	\$0	\$5,333,999	\$3,370,451	\$37,316,679
2010	\$431,852	\$80,792	\$50,637,764	\$571,536	\$0	\$4,499,278	\$3,717,458	\$43,505,208
2011	\$476,959	\$89,789	\$55,544,744	\$555,787	\$0	\$4,827,114	\$3,621,417	\$48,218,748
2012	\$636,599	\$55,366	\$44,876,487	\$468,161	\$0	\$4,868,547	\$4,834,137	\$36,333,929
2013	\$527,543	\$52,646	\$53,689,383	\$598,712	\$0	\$5,585,639	\$5,538,057	\$43,744,588
2014	\$602,565	\$115,134	\$65,851,761	\$548,656	\$0	\$5,641,541	\$7,132,216	\$54,344,359
2015	\$477,446	\$85,874	\$63,516,215	\$336,936	\$0	\$5,656,939	\$6,851,244	\$51,908,288
2016	\$403,315	\$93,947	\$70,908,032	\$613,634	\$0	\$5,935,328	\$7,653,868	\$58,429,732

Note: Funding levels are determined by the Florida Legislature and Florida Department of Education.

Source: Florida Lottery.

Tallahassee MSA Contributions from Florida Lottery

Trend: Since 1987, over \$1.26 billion has gone towards educational institutions in the Tallahassee MSA from the Florida Lottery, with universities accounting for almost 73% and K-12 Grades accounting for around 17%. Leon County accounted for almost 95% of contributions to the Tallahassee MSA. Funding levels are determined by the Florida Legislature and Florida Department of Education.



Trend: Residential Electric Service Points have increased 0.8% per year on average between 2006 and 2017.

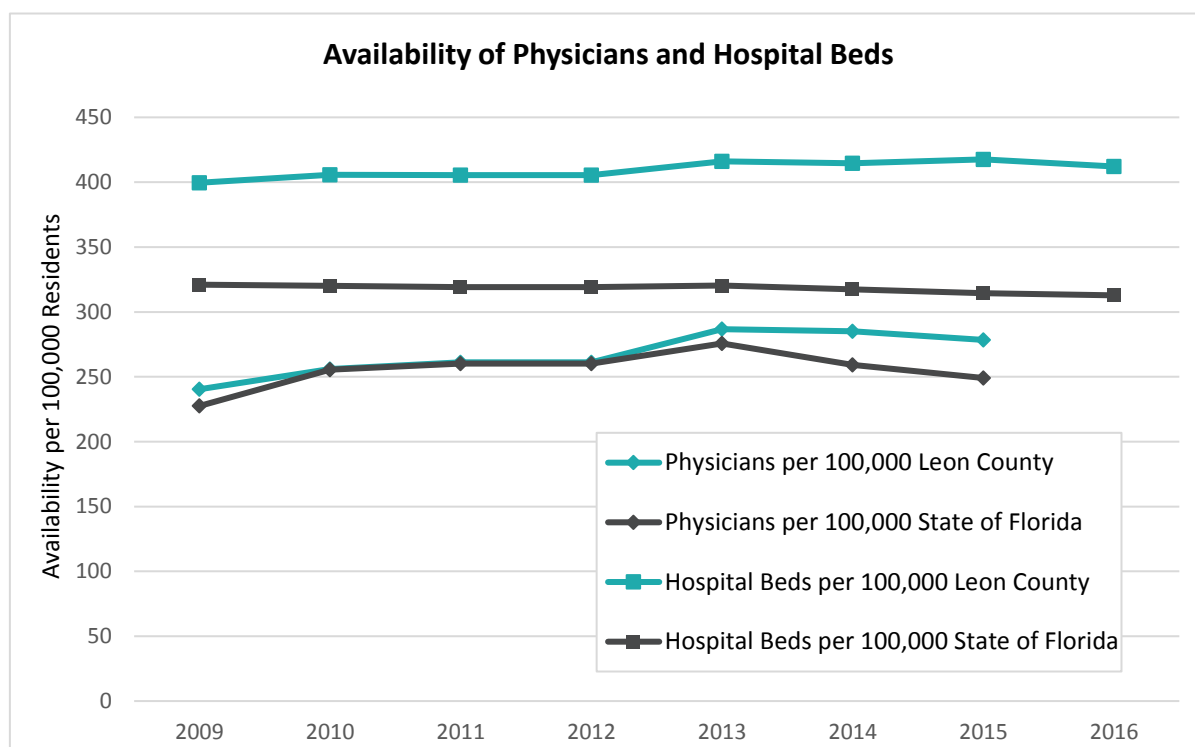
Year	Residential Electric Service Points	Commercial Service Points (Non-Demand)
2006	92,017	11,625
2007	93,569	11,701
2008	94,640	11,774
2009	94,827	11,643
2010	95,268	11,574
2011	95,794	11,572
2012	96,479	11,584
2013	97,145	11,663
2014	97,985	11,776
2015	99,007	11,823
2016	100,003	11,891
2017	100,921	11,969

Source: City of Tallahassee, Electric Utilities

Trend: During 2009-2015, availability of hospital beds in Leon County was on average 28% higher than Florida's, and availability of physicians was about 5% 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
2015	278.5	249	417.6	314.5
2016			412.2	312.8

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



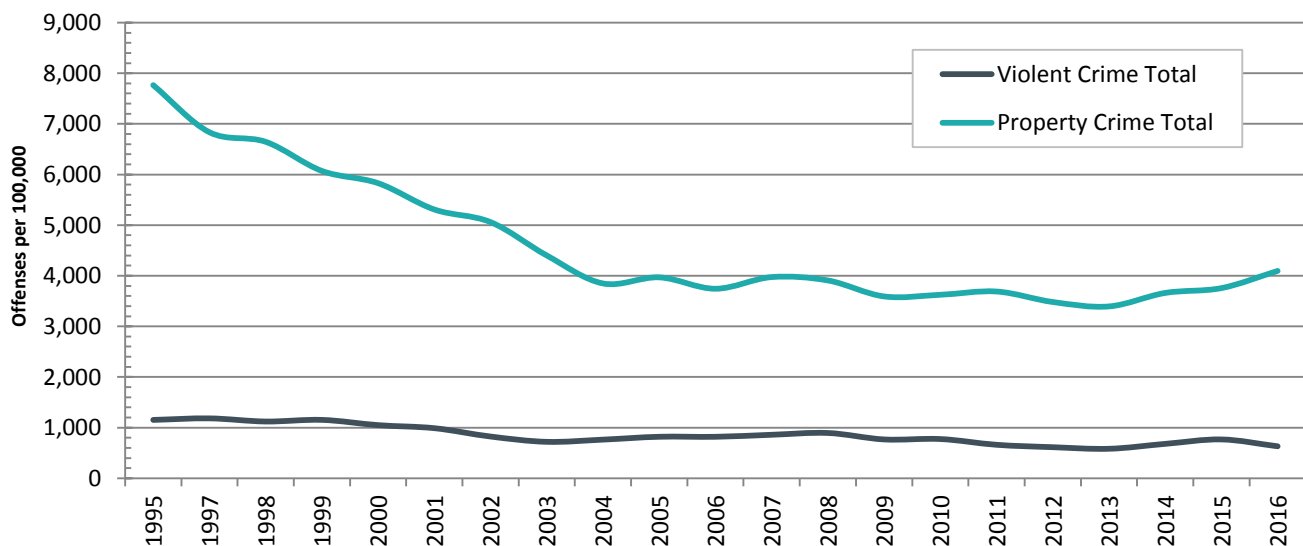
Trend: On a per capita basis, the overall frequency of property and violent crimes in the Tallahassee MSA in the 2010s has been lower than during the 1990s.

Year	Violent Crime					Property Crime			
	Murder and non-negligent manslaughter	Forcible sex offenses	Robbery	Aggravated assault	<i>Violent Crime Total</i>	Burglary	Larceny-theft	Motor vehicle theft	<i>Property Crime Total</i>
1995	7.4	68.4	321.1	755.3	1,152.3	1,717.9	5,425.8	621.6	7,765.3
1996	-	-	-	-	-	-	-	-	-
1997	4.5	72.5	268.0	838.1	1,183.1	1,316.5	5,034.4	484.1	6,835.0
1998	4.1	58.1	266.9	792.0	1,121.1	1,533.9	4,645.8	465.9	6,645.7
1999	3.4	79.4	241.6	828.5	1,153.0	1,422.3	4,106.4	541.9	6,070.6
2000	4.7	66.2	212.4	765.8	1,049.1	1,475.7	3,946.7	405.8	5,828.2
2001	4.8	70.9	211.4	701.9	989.0	1,353.5	3,526.4	428.9	5,308.8
2002	4.7	77.3	176.8	565.3	824.1	1,271.7	3,416.2	372.0	5,060.0
2003	3.6	71.3	138.4	506.2	719.4	1,146.9	2,931.7	321.7	4,400.2
2004	5.7	76.1	129.5	552.0	763.2	1,259.7	2,245.8	342.2	3,847.7
2005	5.9	62.8	155.1	595.9	819.7	1,249.0	2,409.3	310.2	3,968.5
2006	3.2	70.2	171.2	574.4	819.0	1,142.6	2,323.4	277.8	3,743.8
2007	2.4	61.0	217.3	578.1	858.8	1,309.4	2,375.7	288.7	3,973.9
2008	4.3	51.7	226.1	612.4	894.5	1,331.7	2,363.3	212.5	3,907.5
2009	3.6	46.6	166.9	549.7	766.8	1,341.0	2,109.2	141.5	3,591.7
2010	5.2	50.3	162.4	557.0	774.9	1,181.0	2,291.2	152.2	3,624.4
2011	4.8	42.2	167.6	446.5	661.1	1,247.0	2,295.3	146.3	3,688.6
2012	5.9	44.0	163.3	400.2	613.4	1,088.3	2,202.8	190.8	3,481.8
2013	4.5	58.9	120.1	398.8	582.3	859.7	2,374.2	160.2	3,394.1
2014	4.8	70.2	93.8	510.3	679.2	941.6	2,479.1	240.2	3,660.9
2015	6.6	80.9	122.3	557.2	767.1	832.7	2,602.3	321.3	3,756.3
2016	4.5	74.6	127.5	425.0	631.6	871.1	2,869.0	355.4	4,095.4

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.

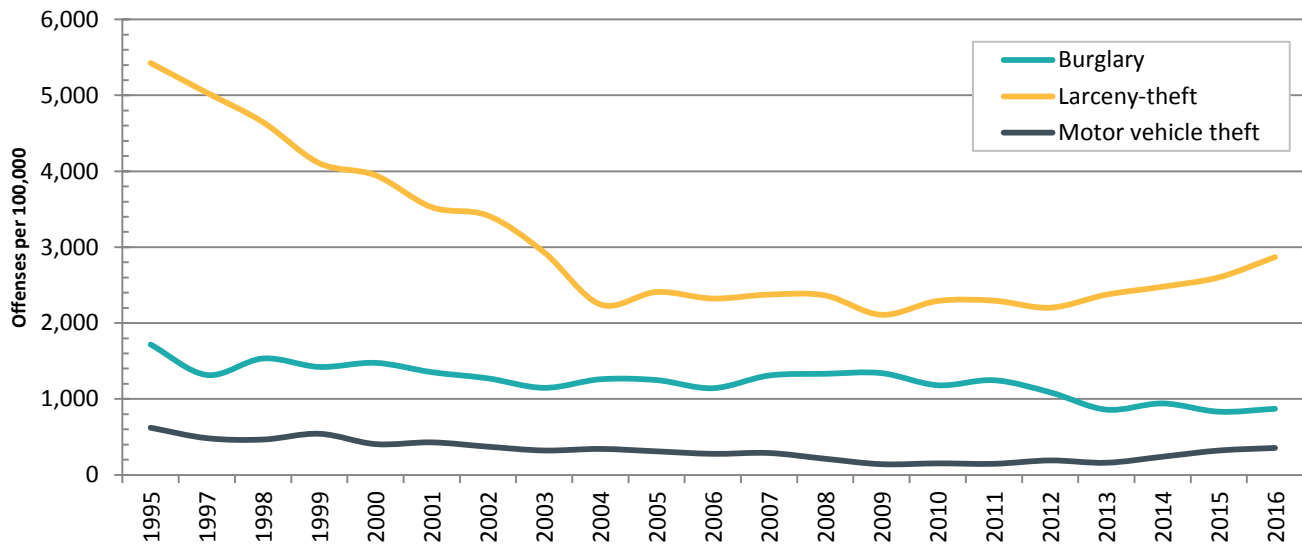
Source: FBI UCR

Index of Property and Violent Crimes in Tallahassee MSA

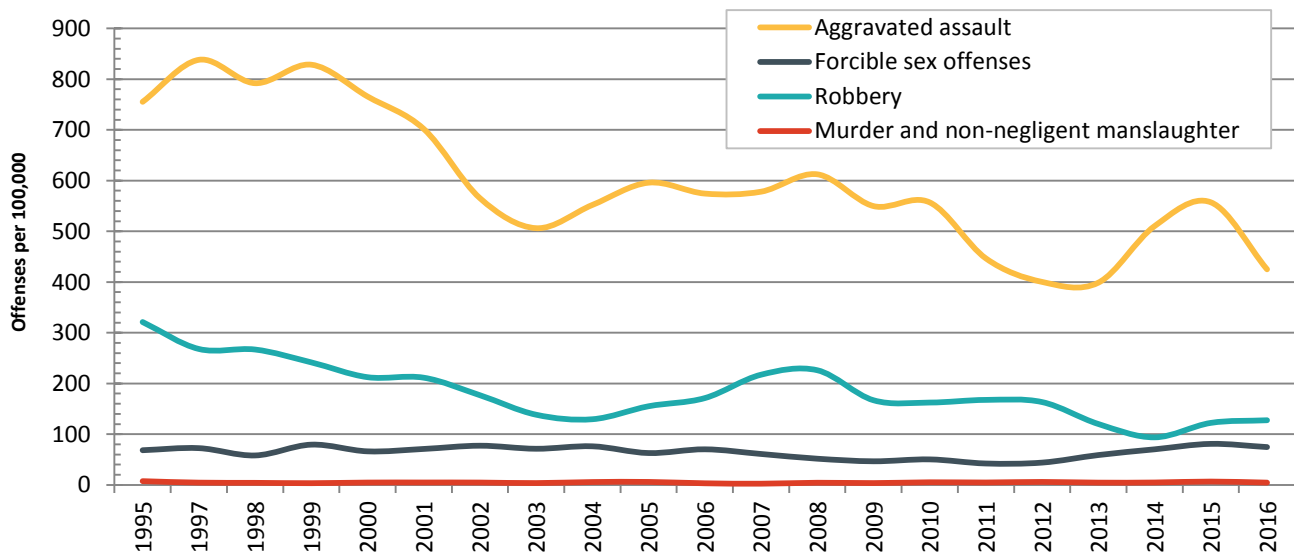


Trend: On a per capita basis, the overall frequency of property and violent crimes in the Tallahassee MSA in the 2010s has been lower than during the 1990s.

Index of Property Crime Offenses in Tallahassee MSA



Index of Violent Crime Offenses in Tallahassee MSA



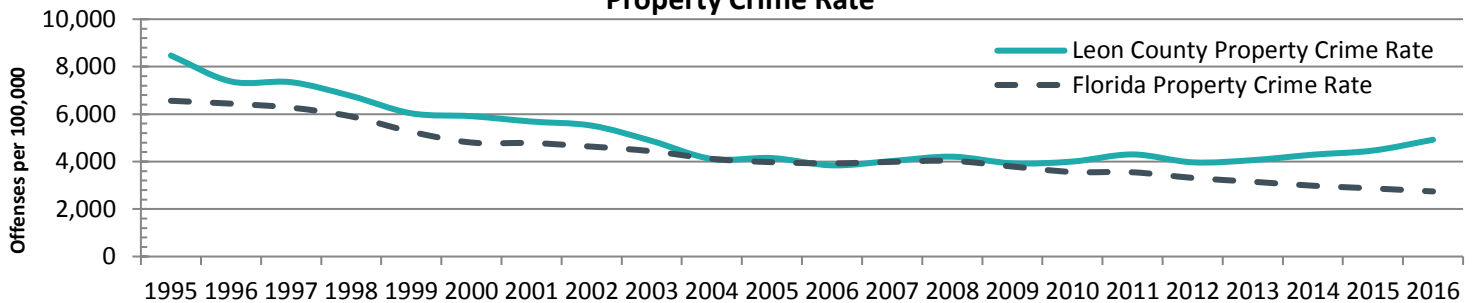
Trend: On a per capita basis, the overall frequency of property and violent crimes in Leon County in the 2010s has been lower than during the 1990s.

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	1,152.5	1,034.8
1996	7,376.1	6,441.2	972.4	1,023.0
1997	7,345.6	6,273.1	1,198.9	998.6
1998	6,764.9	5,902.7	1,042.7	906.1
1999	6,034.4	5,257.1	1,072.2	814.7
2000	5,913.1	4,803.2	1,022.3	776.4
2001	5,687.8	4,781.9	968.8	770.2
2002	5,516.1	4,631.3	824.1	739.8
2003	4,871.2	4,436.5	708.4	701.8
2004	4,112.2	4,114.9	724.1	681.5
2005	4,149.6	3,975.0	746.2	679.1
2006	3,842.2	3,926.2	753.8	685.4
2007	4,026.1	3,989.2	790.8	685.8
2008	4,207.1	4,029.5	818.9	648.0
2009	3,929.0	3,792.7	718.3	586.6
2010	4,002.1	3,561.8	738.6	525.1
2011	4,301.8	3,550.9	712.3	501.7
2012	3,969.1	3,313.2	657.6	474.2
2013	4,061.8	3,151.2	630.8	460.0
2014	4,290.9	2,983.9	724.5	450.8
2015	4,464.9	2,871.3	829.7	471.4
2016	4,921.2	2,742.2	734.2	439.2

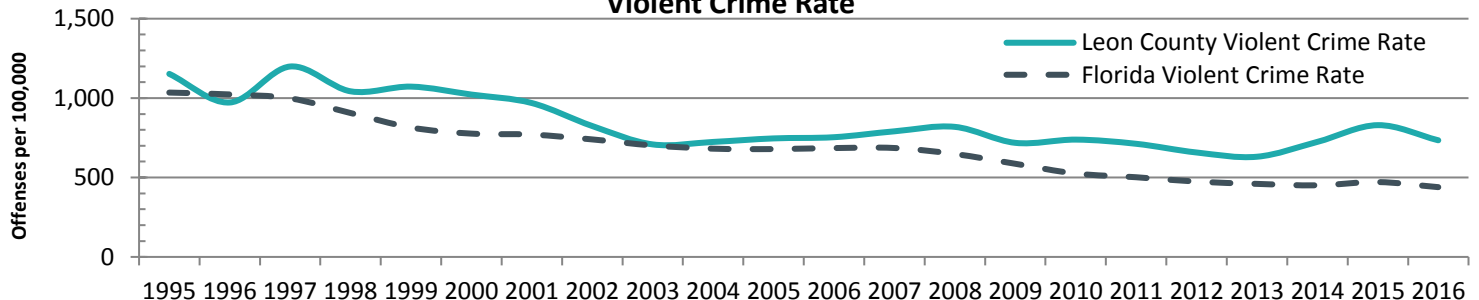
Note: Offenses per 100,000. Property crimes include burglary, larceny, and motor vehicle theft. Violent crimes include murder, forcible sex offenses, robbery, and aggravated assault.

Source: Florida Department of Law Enforcement

Property Crime Rate



Violent Crime Rate

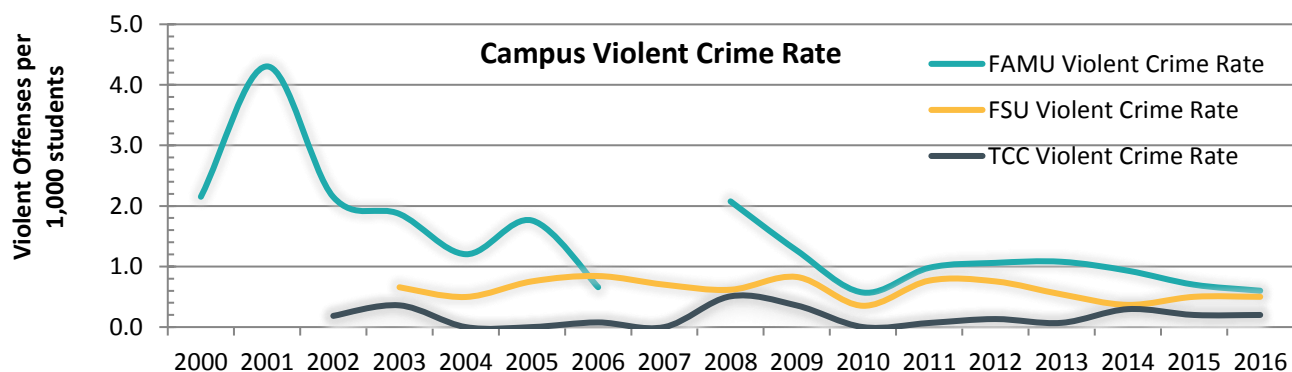
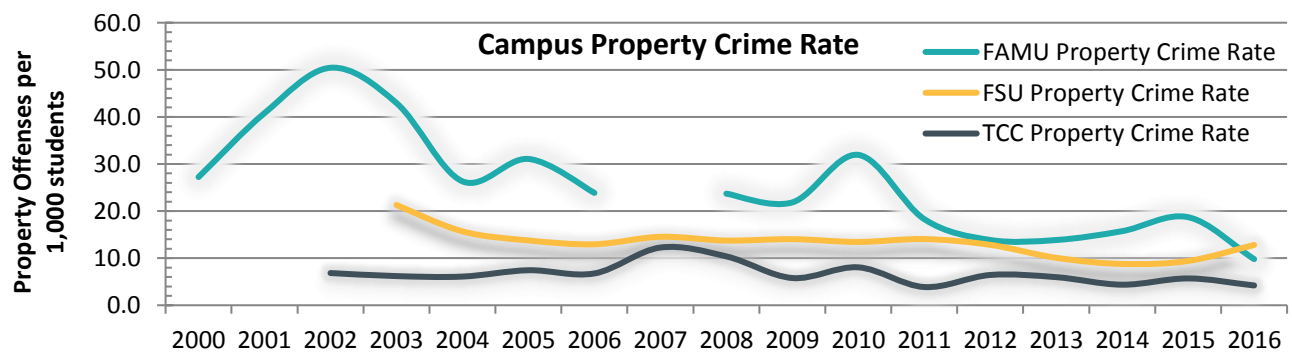


Trend: On a per student basis, the frequency of both violent and property crimes on the campuses of FAMU, FSU, and TCC have been lower in the 2010s than they were in the 2000s.

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
2015	18.7	9.4	5.7	0.7	0.5	0.2
2016	9.8	12.8	4.2	0.6	0.5	0.2

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





Community and Environment

Property Tax Rate

2017 Millage Rates

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	4.32500
Local Board	Anywhere in Leon County	2.24800
Tallahassee City Commission	Within City Limits Only	4.10000
Downtown Improvement Authority	In the Downtown Area Only	1.00000
NW Florida Water Mgmt. District	Anywhere in Leon County	0.03530
Inside City Limits Total		19.52270
Outside City Limits Total		15.42270
Downtown Improvement Area		20.52270

Source: Leon County Property Appraiser



Community and Environment

Tallahassee's History of Annexations

1927-2017

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 over 75 additional square miles having been added during this time, swelling the size of Tallahassee to 103.40 square miles as of January 1, 2018. 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.

Year	Beginning Size (Square Miles)	Area Increase (Square Miles)	Ending Size (Square Miles)
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	0.23	103.29
2015	103.29	0.00	103.29
2016	103.29	0.08	103.37
2017	103.37	0.03	103.40

Source: City of Tallahassee, *Underground Utilities & Public Infrastructure*

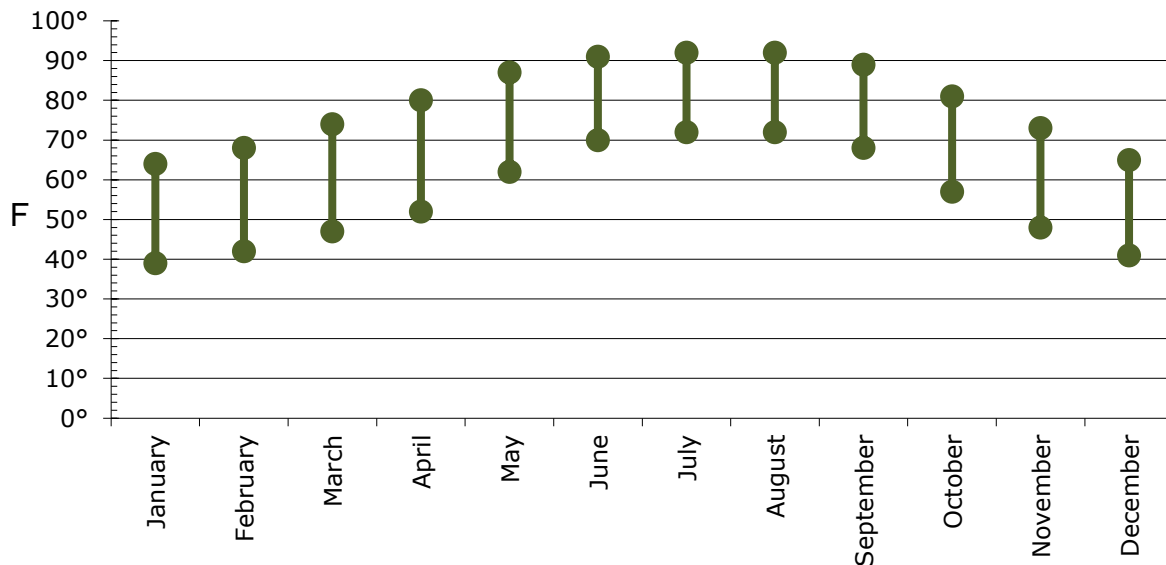
Trend: Tallahassee has a mild, moist climate characteristic of the Gulf States, experiencing a subtropical summer similar to the rest of Florida. In contrast to the Florida peninsula, Northwest Florida of which Tallahassee is a part, experiences four seasons. Prevailing winds average 6.2 miles per hour 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) (1942-2015)	Avg. Days Below 32 degrees (Fahrenheit) (1942-2015)	Avg. Number of Days With Rain (1942-2015)	Avg. Rainfall (Inches) (1981-2010)
January	64	39	0	10	9	4.3
February	68	42	0	6	9	4.9
March	74	47	0	2	9	5.9
April	80	52	1	*	7	3.1
May	87	62	10	0	8	3.5
June	91	70	19	0	13	7.7
July	92	72	23	0	17	7.2
August	92	72	22	0	14	7.4
September	89	68	14	0	9	4.7
October	81	57	2	*	5	3.2
November	73	48	0	3	6	3.5
December	65	41	0	8	8	3.9
Annual	79.5	55.8	91	30	115	59.2

Note: Asteriks (*) denote average frequency of occurrence greater than zero but smaller than one-half.

Source: National Climatic Data Center, Comparative Climatic Data

Average Daily Low and High Temperatures

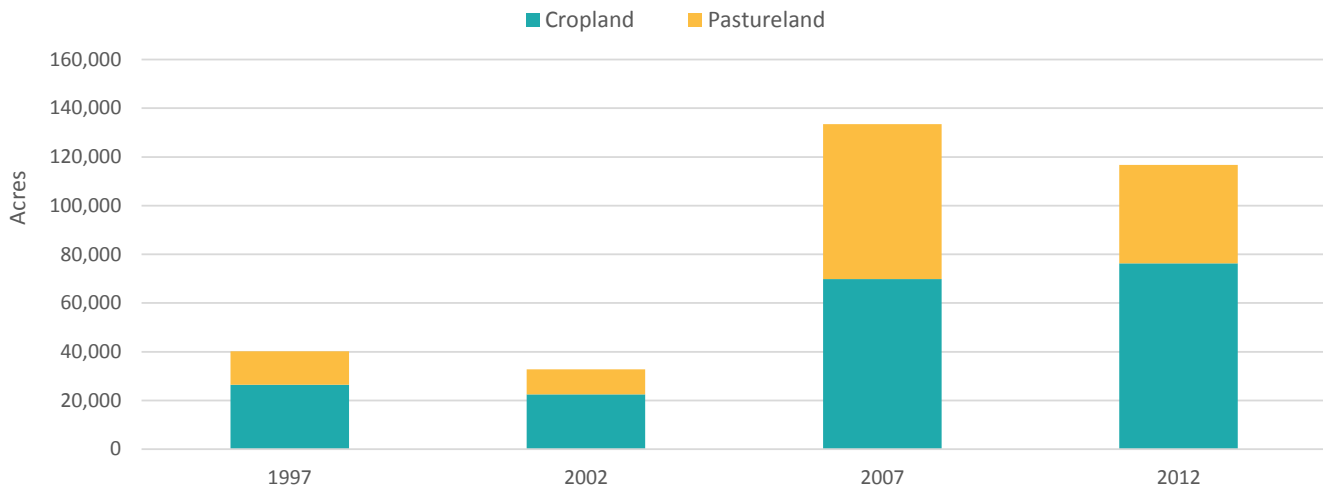


Trend: Gadsden and Jefferson counties account for most commercial agricultural activity in the Tallahassee MSA, with cotton, peanuts, and cattle as principal commodities. As of 2012, annual sales of crops and animals and animal products exceeded \$100 million.

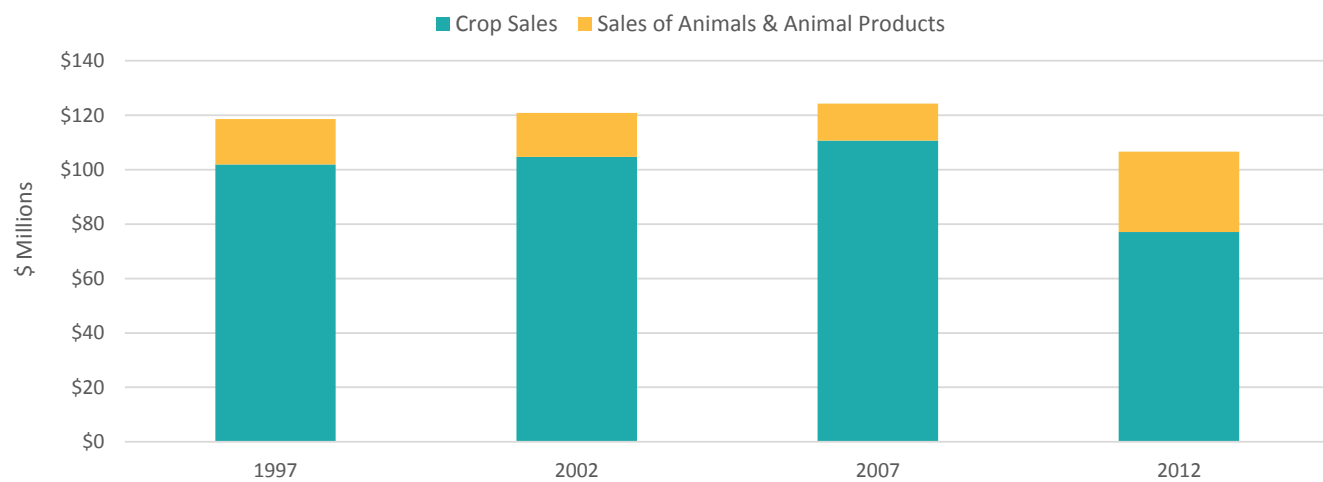
Year	Farmland Acreage in Tallahassee MSA		Agricultural Sales (\$1,000s)	
	Cropland	Pastureland	Crop Sales	Sales of Animals & Animal Products
1997	26,439	13,721	\$101,932	\$16,642
2002	22,459	10,332	\$104,659	\$16,115
2007	69,864	63,640	\$110,671	\$13,531
2012	76,320	40,404	\$77,070	\$29,494

Source: USDA, Census of Agriculture

Farmland Acreage in Tallahassee MSA



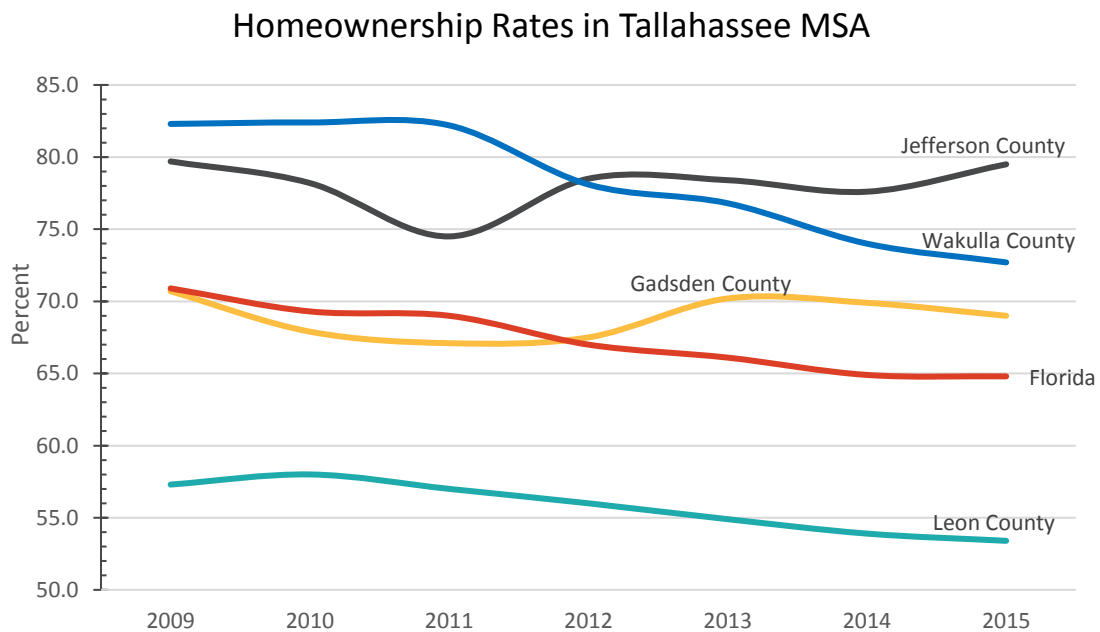
Agricultural Sales in Tallahassee MSA



Trend: Homeownership rates in the Tallahassee MSA are highest in Jefferson and Wakulla counties. Due in part to its student population, Leon County's homeownership rate is the lowest in the Tallahassee MSA and lower than the State rate.

Year	Leon County	Jefferson County	Gadsden County	Wakulla County	Florida
2009	57.3	79.7	70.7	82.3	70.9
2010	58.0	78.2	67.9	82.4	69.3
2011	57.0	74.5	67.1	82.2	69.0
2012	56.0	78.5	67.5	78.1	67.0
2013	54.9	78.4	70.2	76.8	66.1
2014	53.9	77.6	69.9	74.0	64.9
2015	53.4	79.5	69.0	72.7	64.8

Source: U.S. Bureau of the Census, Homeownership Rate, retrieved from FRED, Federal Reserve Bank of St. Louis



Community and Environment

Motor Vehicle Crashes in Leon County

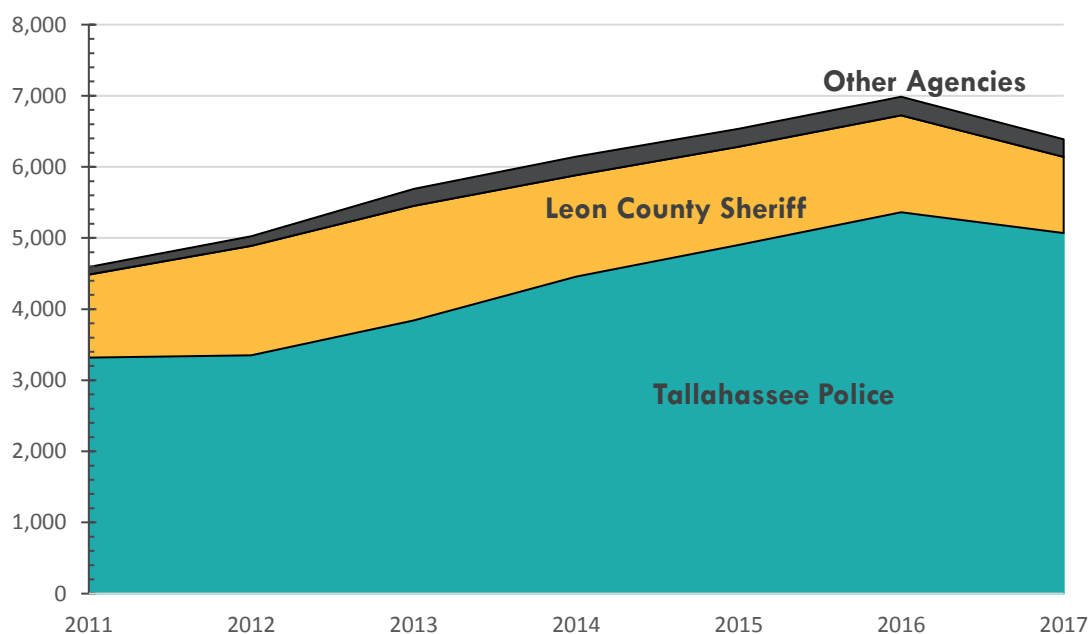
Trend: Between 2011 and 2017, there were on average 5,909 motor vehicle crashes in Leon County each year (or about 16 per day), with an annual average of 20 traffic fatalities.

Year	Tallahassee Police	Leon County Sheriff	Other Agencies	Total Crashes	Total Traffic Fatalities
2011	3,318	1,168	108	4,594	23
2012	3,352	1,538	136	5,026	26
2013	3,842	1,610	237	5,689	12
2014	4,459	1,423	263	6,145	22
2015	4,903	1,380	252	6,535	19
2016	5,361	1,363	262	6,986	27
2017	5,068	1,071	247	6,386	10

Note: Other Agencies includes FSU Police, FAMU Police, TCC Police, and FDLE Capitol Police.

Source: Florida's Integrated Report Exchange System (FIRES)

Motor Vehicle Crashes in Leon County



Community and Environment

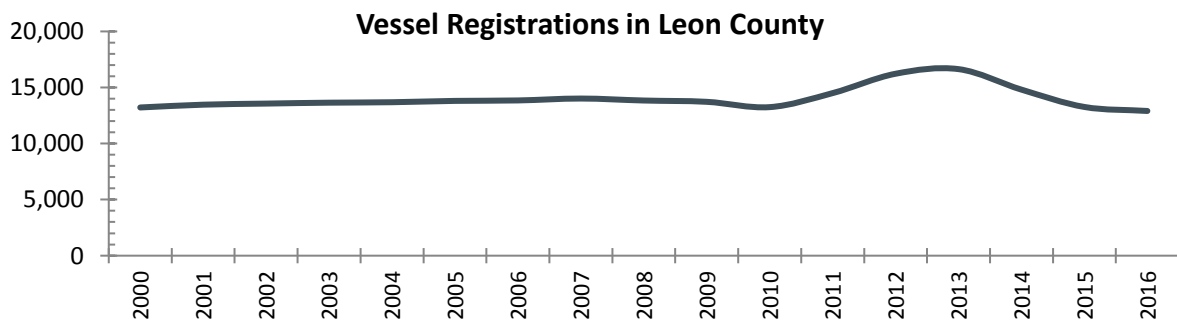
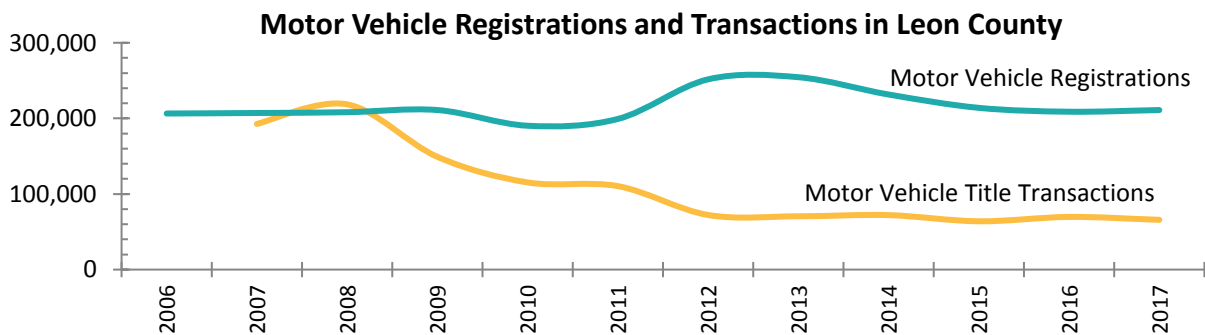
Vehicle & Vessel Registrations in Leon County

Trend: Motor vehicle registrations in Leon County averaged approximately 216,000 during 2006-2017. Transactions of motor vehicles in Leon County peaked during the 2007-2009 recession but have stabilized at an average of 69,000 per year since 2012. Vessel registrations in Leon County have averaged about 14,000 since 2000.

Year	Motor Vehicle Registrations*	Vessel Registrations	Motor Vehicle Title Transactions*
2000		13,218	
2001		13,466	
2002		13,564	
2003		13,645	
2004		13,685	
2005		13,805	
2006	206,445	13,845	
2007	207,146	14,013	192,714
2008	208,138	13,837	218,563
2009	211,053	13,722	149,133
2010	190,263	13,248	115,281
2011	199,259	14,498	110,383
2012	251,647	16,226	72,212
2013	254,468	16,638	70,517
2014	231,584	14,809	72,020
2015	213,923	13,263	63,868
2016	208,824	12,906	69,662
2017	210,999		65,837

*Fiscal Year

Source: Florida Department of Highway Safety and Motor Vehicles





Residential and Commercial Development

Residential Development:

Residential Building Permits Issued

Trend: The overall level of residential building permits for new construction issued in Leon County has continued to steadily increase over the past few years. There were 734 permits issued for new single-family (detached and attached) homes in 2017, the highest level since 2007, but still well below the historical annual average of 1,224 new single-family construction permits issued per year since 1970 (earliest Planning Department records available). Multi-family new construction permits included The Lumberyard, Players Club, Stadium Enclave, Quantum on West Call, CollegeTown Phase III, and Lullwater.

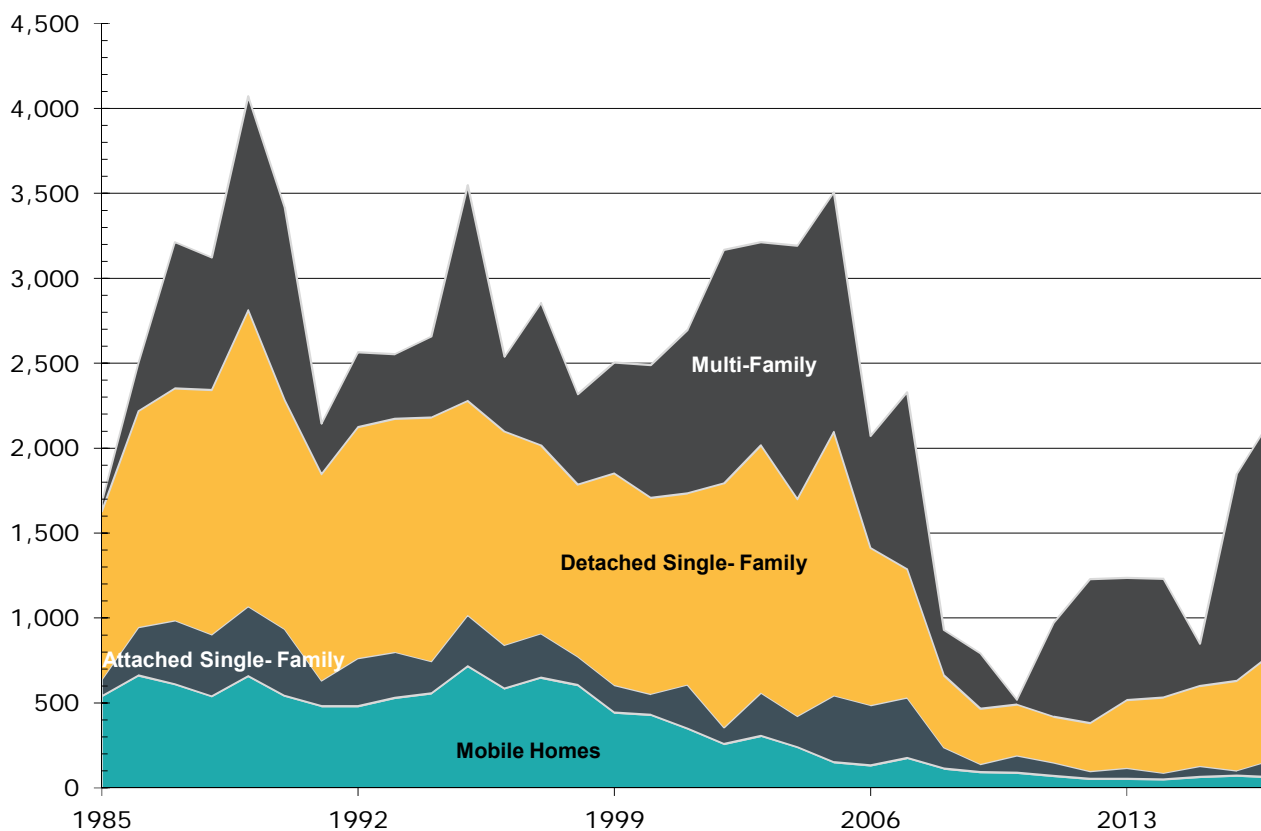
Year	Detached Single-Family	Attached Single-Family	Multi-Family	Constructed Units Permitted	Mobile Homes*	Total Housing Units Permitted	Total Units Permitted, Yearly % Change
1985	992	97	54	1,143	540	1,683	
1986	1,271	286	280	1,837	661	2,498	48.4%
1987	1,366	375	860	2,601	611	3,212	28.6%
1988	1,439	363	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%
2016	526	30	1,217	1,773	73	1,846	117.4%
2017	630	104	1,394	2,128	62	2,190	18.6%

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

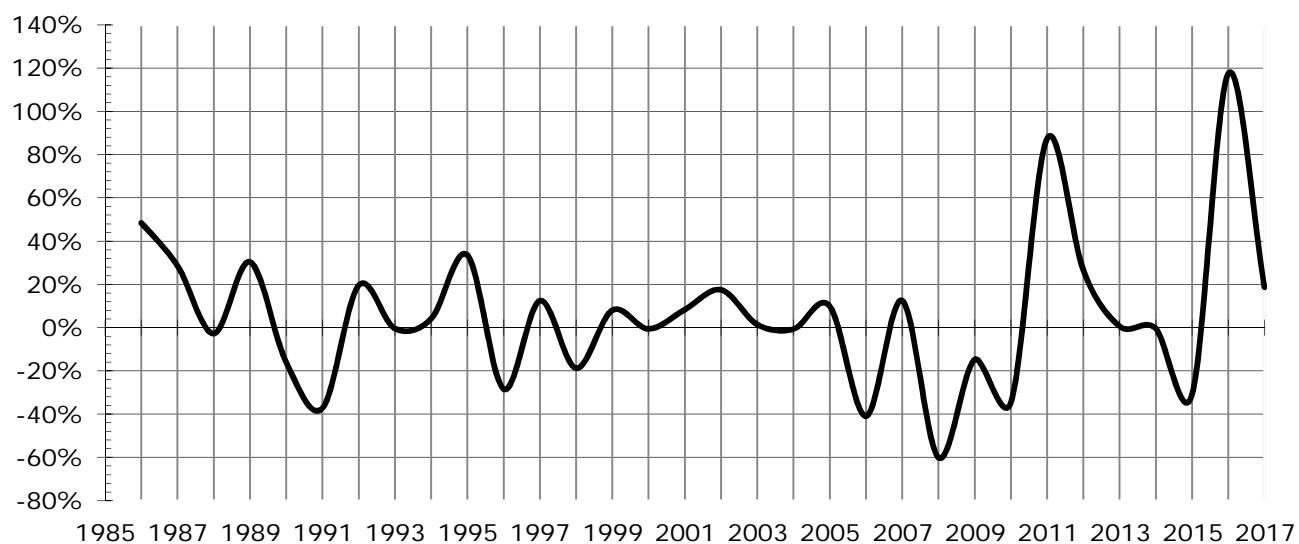
Sources: Permit Enforcement Tracking System, Leon County Department of Development Support & Environmental Management, City of Tallahassee Growth Management Department

**Residential Development:
Residential Building Permits Issued**

Total Housing Units Permitted



Total Housing Units Permitted, Percent Change from Previous Year



Residential and Commercial Development

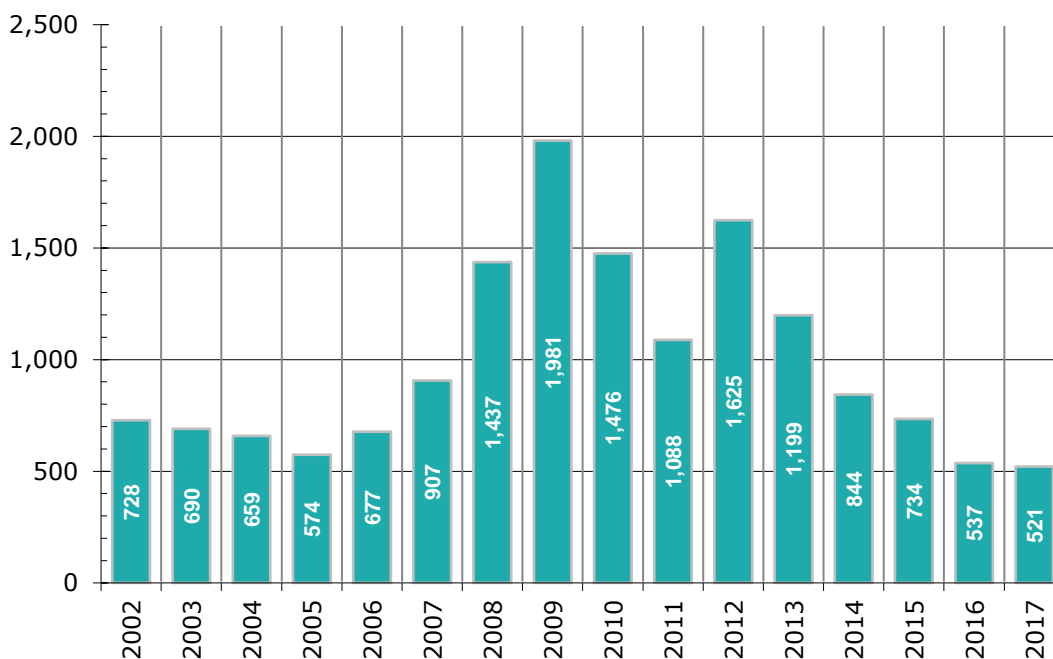
Mortgage Foreclosure Cases

Mortgage foreclosure cases decreased by 3% in 2017 when compared to 2016, the fifth consecutive year of declining rates of mortgage foreclosure cases in Leon County and only about one-third of the 2012 total.

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%
2016	537	-26.8%
2017	521	-3.0%

Source: Leon County Clerk of Courts

Leon County Mortgage Foreclosure Cases



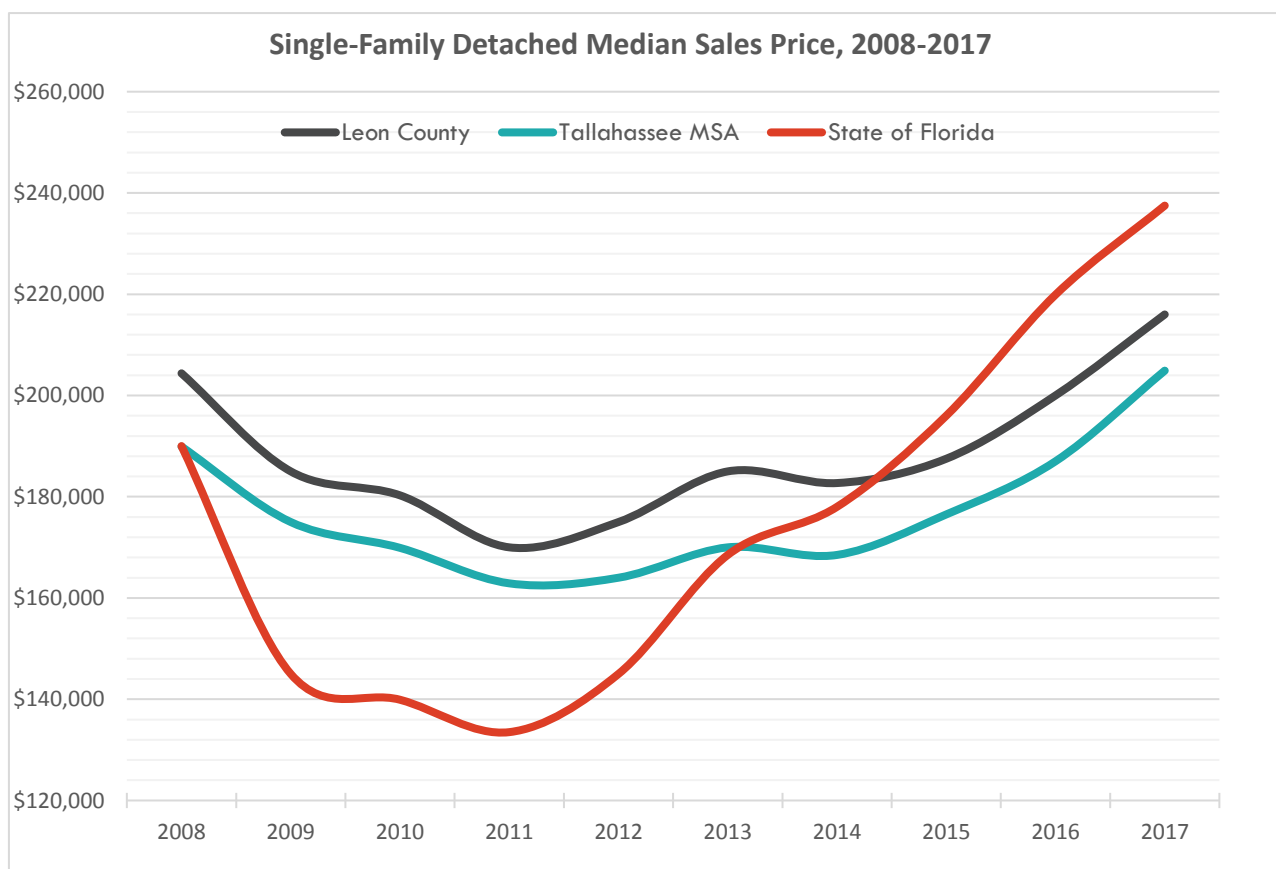
Residential and Commercial Development

Single-Family Detached Home Sales and Median Price

Trend: The median sales price for single family homes was up 8.0% in Leon County and 9.6% for the Tallahassee MSA (2017).

Year	Leon County		Tallahassee MSA		State of Florida	
	Closed Sales	Median Sales Price	Closed Sales	Median Sales Price	Closed Sales	Median Sales Price
2008	1,851	\$204,375	2,398	\$189,900	128,372	\$190,000
2009	1,807	\$185,000	2,263	\$175,000	172,767	\$145,000
2010	1,730	\$180,270	2,190	\$169,900	176,873	\$139,900
2011	1,754	\$170,000	2,174	\$162,888	187,213	\$133,500
2012	1,971	\$175,000	2,405	\$164,000	203,073	\$145,000
2013	2,362	\$185,000	2,933	\$170,000	225,446	\$168,500
2014	2,570	\$182,700	3,271	\$168,500	240,286	\$178,000
2015	2,925	\$187,500	3,664	\$176,500	266,209	\$196,000
2016	3,160	\$200,000	3,978	\$187,000	268,731	\$219,900
2017	3,192	\$216,000	4,058	\$204,900	217,868	\$237,500

Source: Tallahassee Board of Realtors MLS

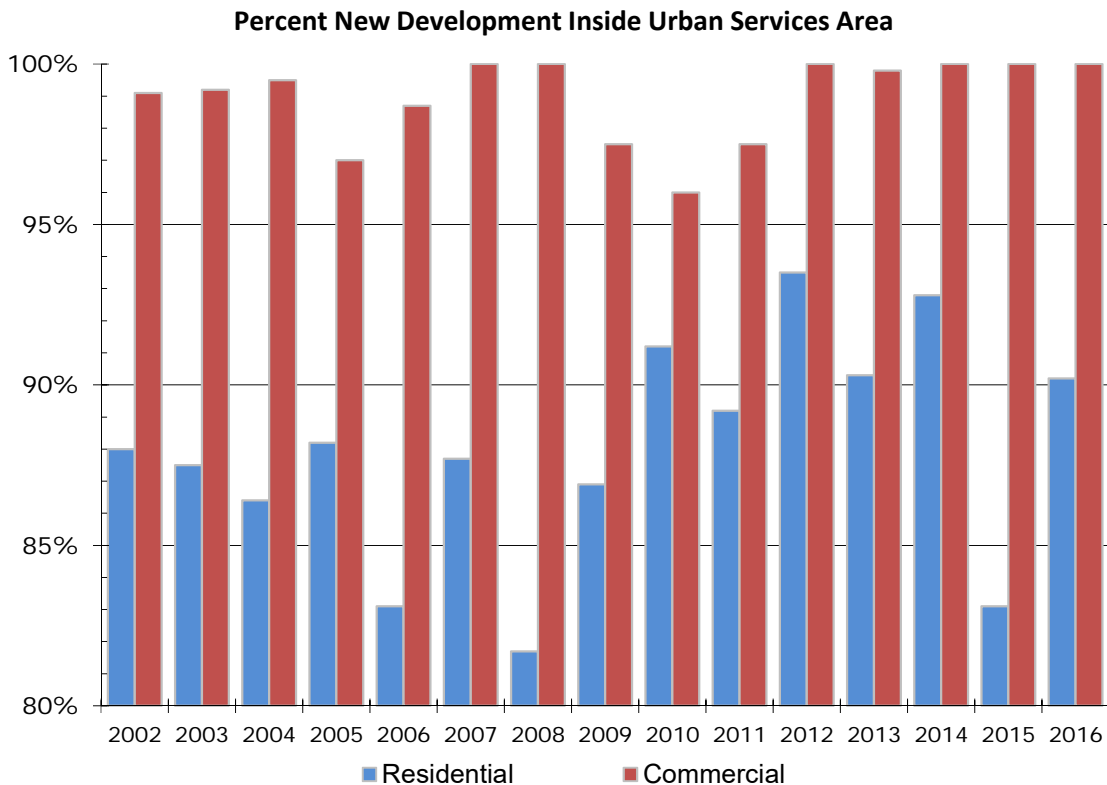


Trend: The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA). The location and size of the USA is based upon the area necessary to accommodate 90% of new residential dwelling units within the County by the Plan Horizon.

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%
2016	90.2%	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



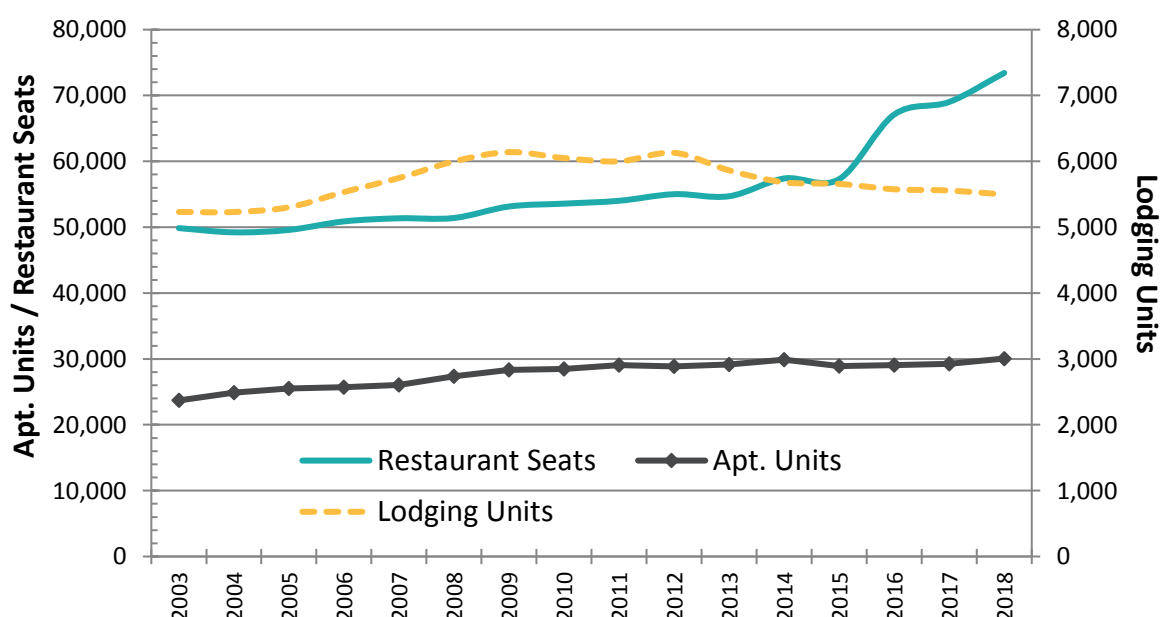
Trend: In the 15 years between 2003 and 2018, the total number of restaurant seats available in Leon County increased by 37%, apartment units increased nearly 27%, and hotel and motel rooms and units available increased by around 5%.

Year	Food Service		Apartments		Lodging	
	Establishments*	Restaurant Seats	Apt. Establishments	Apt. Units	Hotels & Motels	Units
2003	496	49,860	412	23,695	59	5,232
2004	488	49,221	414	24,867	59	5,231
2005	493	49,592	420	25,516	59	5,303
2006	519	50,884	412	25,728	61	5,534
2007	517	51,354	409	26,072	64	5,747
2008	518	51,400	412	27,380	65	5,999
2009	535	53,146	418	28,351	67	6,140
2010	554	53,580	412	28,490	67	6,050
2011	560	54,010	421	29,080	66	6,000
2012	579	55,016	417	28,868	67	6,130
2013	600	54,705	425	29,152	65	5,863
2014	612	57,401	422	29,875	63	5,682
2015	622	57,297	422	28,904	62	5,658
2016	648	67,104	423	29,041	61	5,576
2017	659	69,024	422	29,246	61	5,557
2018	680	73,424	426	30,057	60	5,496

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

Source: Florida Department of Business and Professional Regulation

Food Service Seats, Apartment Units, and Lodging Units in Leon County



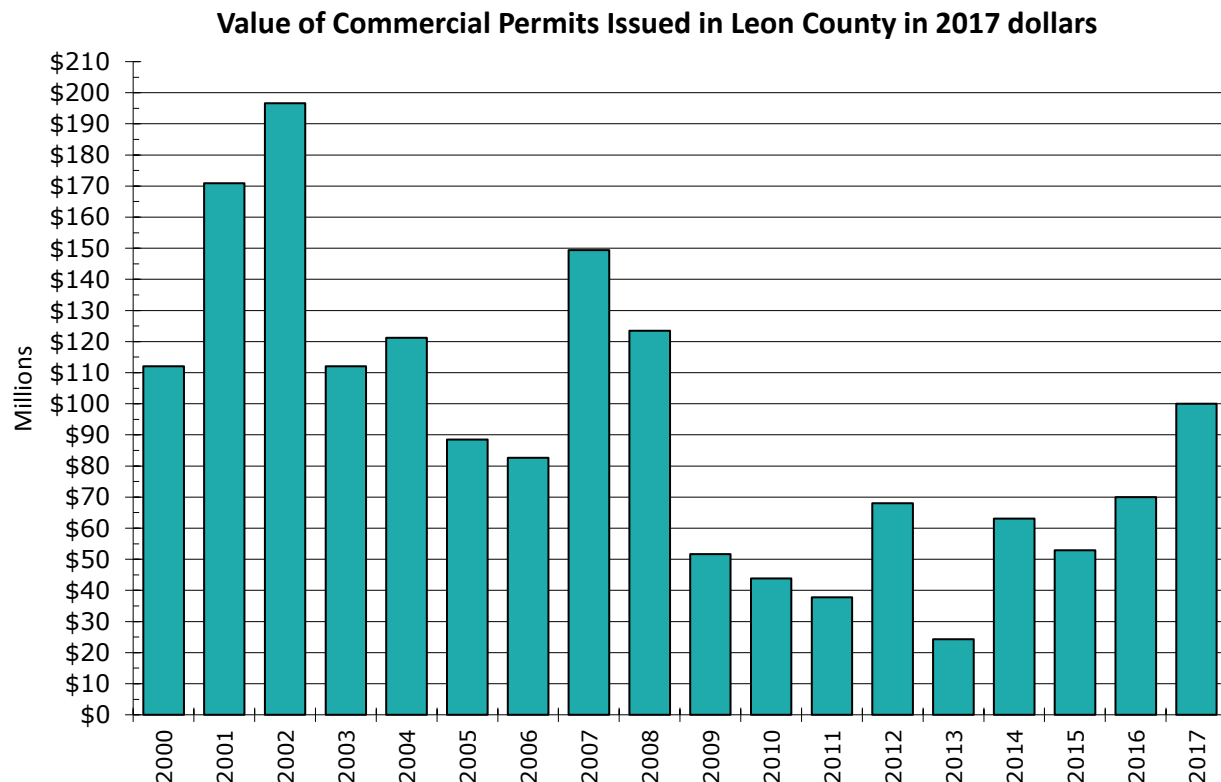
Residential and Commercial Development

Commercial Building Permits Issued - New Construction

Trend: The value of commercial permits issued for new construction in 2017 was up in comparison with 2016 and the highest since 2008.

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2017 Dollars (\$Millions)
2000	119	\$78.7	\$112.0
2001	140	\$123.5	\$170.9
2002	129	\$144.3	\$196.6
2003	104	\$84.1	\$112.0
2004	106	\$93.4	\$121.2
2005	98	\$70.5	\$88.5
2006	109	\$68.0	\$82.7
2007	83	\$126.4	\$149.4
2008	88	\$108.5	\$123.5
2009	48	\$45.2	\$51.6
2010	30	\$39.0	\$43.8
2011	26	\$34.7	\$37.8
2012	54	\$63.7	\$68.0
2013	25	\$23.1	\$24.3
2014	39	\$60.9	\$63.1
2015	40	\$51.1	\$52.8
2016	55	\$68.5	\$70.0
2017	88	\$100.0	\$100.0

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



Residential and Commercial Development

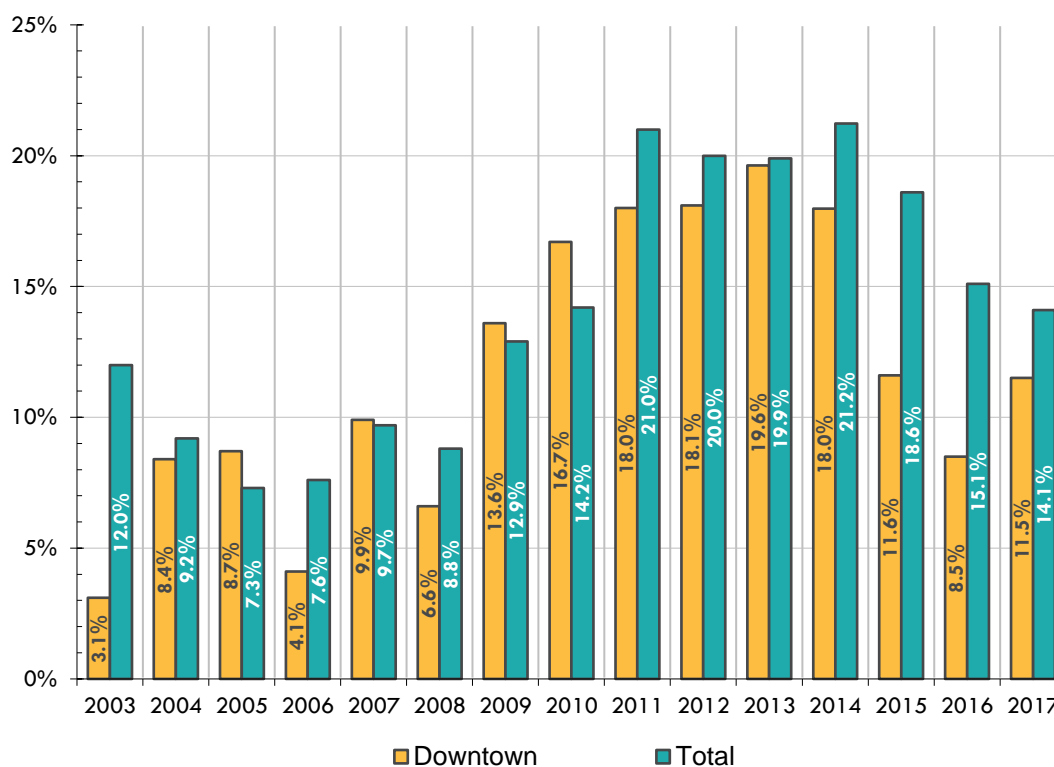
Historical Office Vacancy Rates

Trend: The overall office vacancy rate in Leon County fell for the third straight year, down to 14.1% for year-end 2017, the lowest annual vacancy rate since 2010. Vacancy rates declined in all submarkets except downtown, which increased primarily due to 20,000 SF of new Class A space coming online in 2017. The vacancy rate for Class A space continues to stay low at 7.8%

Year	Downtown	Total
2003	3.1%	12.0%
2004	8.4%	9.2%
2005	8.7%	7.3%
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%
2016	8.5%	15.1%
2017	11.5%	14.1%

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

Historical Office Vacancy Rates



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.

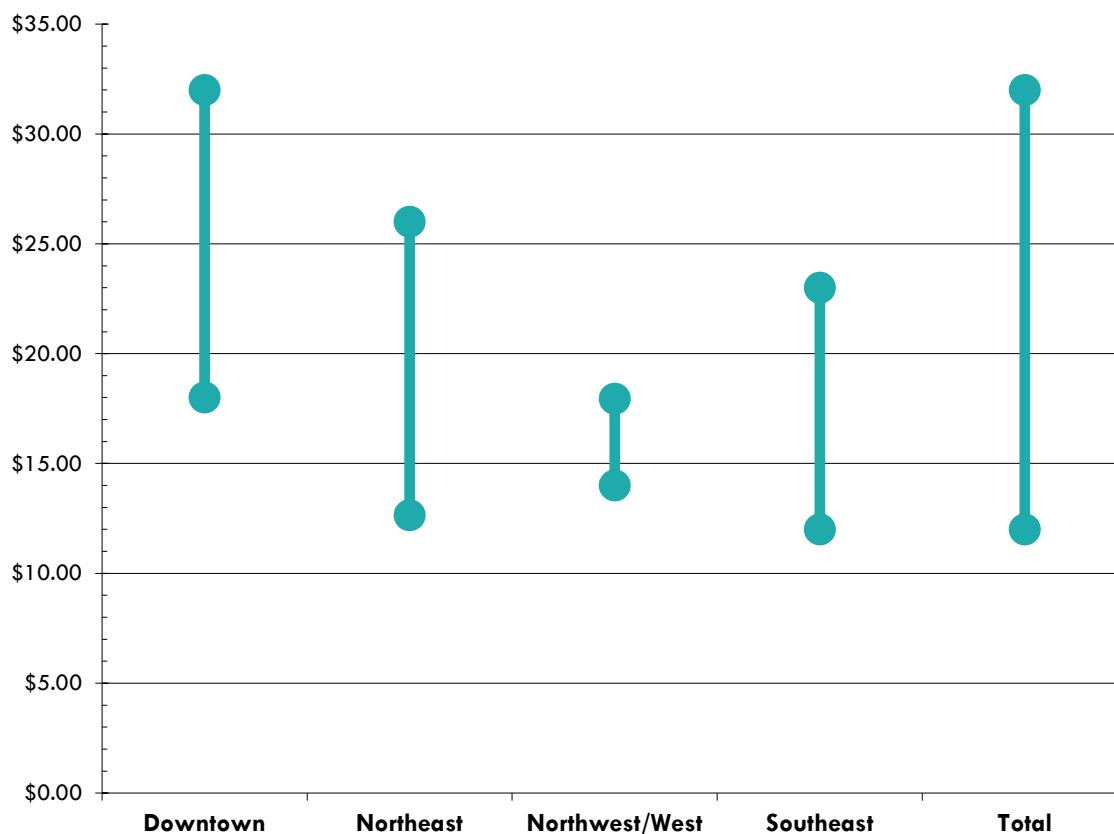
Market	Asking Rents 2017*	
	From	To
Downtown	\$18.00	\$32.00
Northeast	\$12.65	\$26.00
Northwest/West	\$14.00	\$17.95
Southeast	\$12.00	\$23.00
Total	\$12.00	\$32.00

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

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

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

Office Market Survey, Asking Rents, Year-End 2017

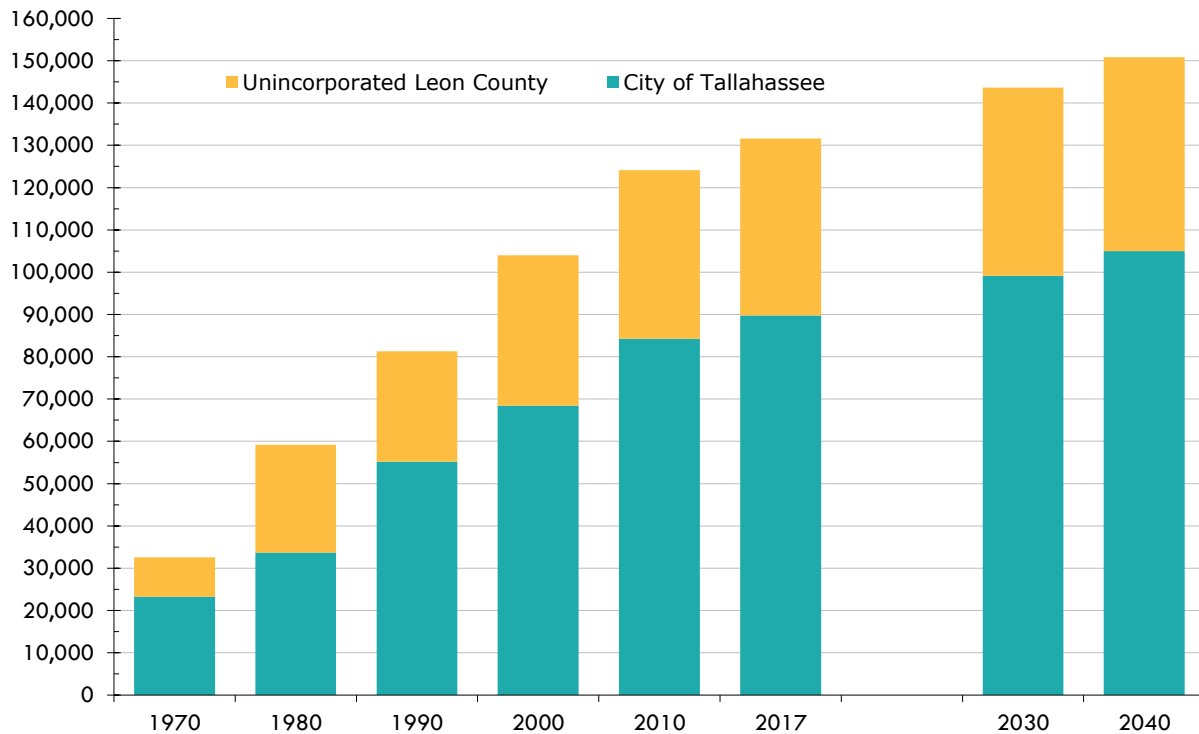


There were an estimated 131,636 residential housing units in Leon County as of 2017, approximately 68% located within the Tallahassee City Limits and 32% in unincorporated Leon County.

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
2017	89,798	41,838	131,636
2030	99,140	44,499	143,639
2040	104,980	45,858	150,838

Sources: U.S. Department of Commerce, Bureau of the Census (1970-2010), Tallahassee-Leon County Office of Economic Vitality Estimates and Projections (2017-2040)

Leon County Housing Unit Inventory, 1970-2040

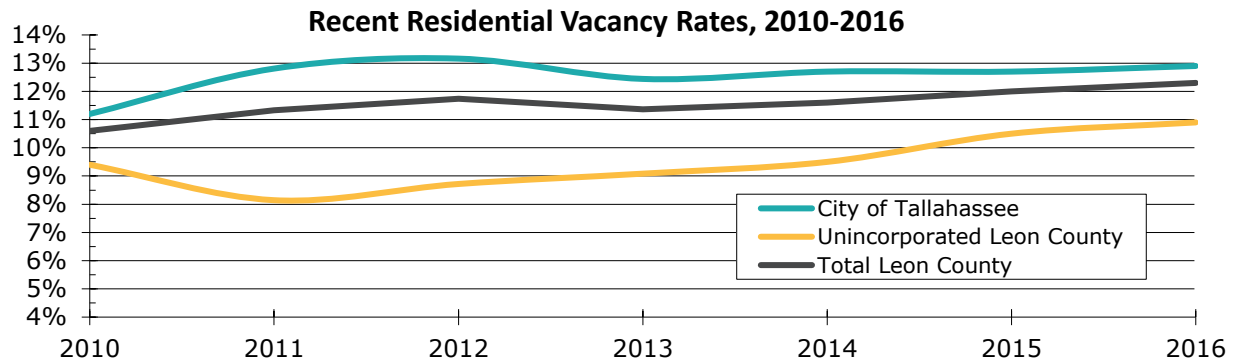


Residential Vacancy Rates

Trend: Residential vacancy rates for Leon County generally increased throughout the 1970s, fell in the 1980s and 1990s, increased in the 2000s, and have generally stayed above 10% since 2010.

Recent Residential Vacancy Rates

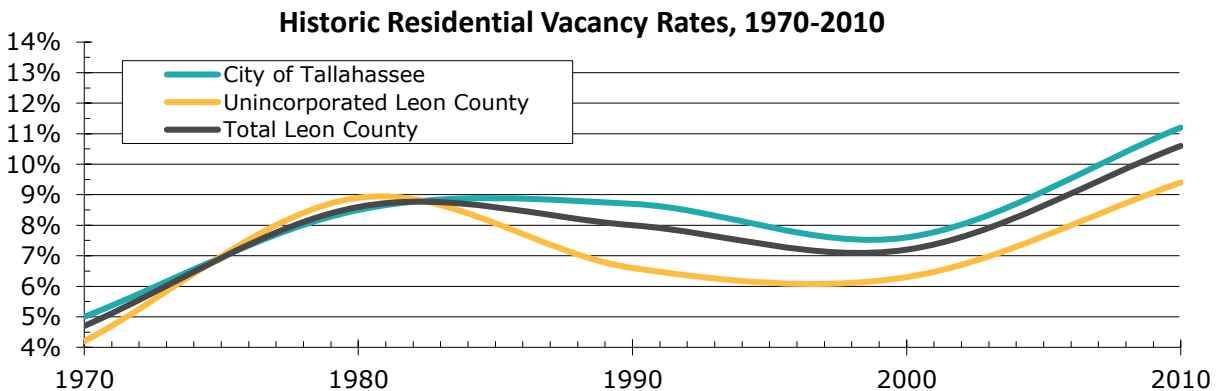
Year	City of Tallahassee	Unincorporated Leon County	Total Leon County
2010	11.2%	9.4%	10.6%
2011	12.8%	8.1%	11.3%
2012	13.2%	8.7%	11.7%
2013	12.4%	9.1%	11.4%
2014	12.7%	9.5%	11.6%
2015	12.7%	10.5%	12.0%
2016	12.9%	10.9%	12.3%



Source: U.S. Department of Commerce, Bureau of the Census, 2010 Decennial Census, 5-Year American Community Survey, 2011 to 2016.

Historic Residential Vacancy Rates

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%



Source: U.S. Department of Commerce, Bureau of the Census, Decennial Census.

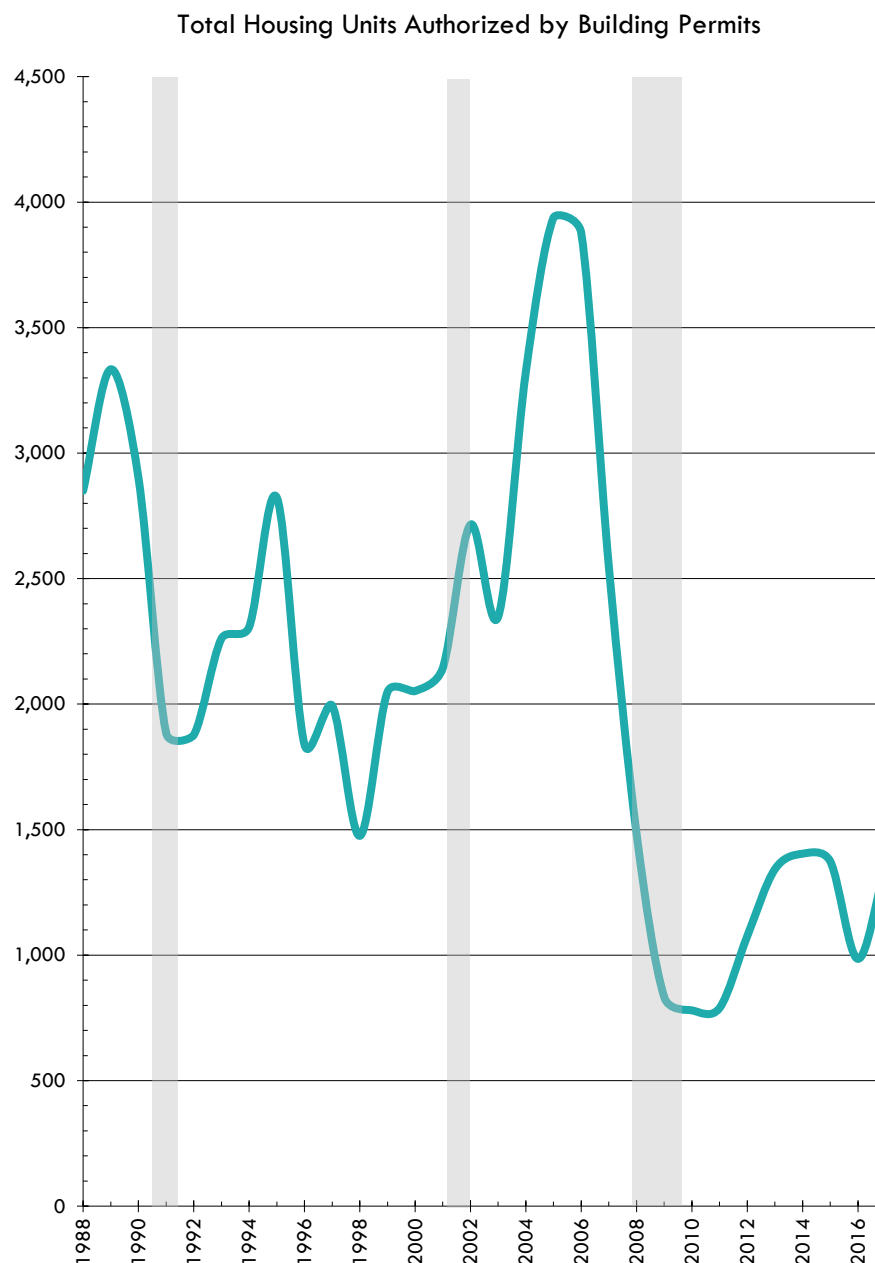
Residential and Commercial Development

Residential Development:

Housing Units Authorized by Building Permits in Tallahassee MSA

Trend: The overall level of residential building permits for new construction authorized in the Tallahassee MSA is increasing since the precipitous decline during the 2007-2009 recession. During the 1990s, there were an average of 2,141 housing units authorized by permits each year. The annual average increased in the 2000s to 2,527 per year, including the 3,938 units authorized in the peak year of 2005. The annual average in the 2010s so far is 1,138, or 45% of the average during the 2000s.

Year	Units Authorized by Building Permits
1988	2,850
1989	3,334
1990	2,902
1991	1,885
1992	1,877
1993	2,261
1994	2,307
1995	2,823
1996	1,839
1997	1,994
1998	1,475
1999	2,048
2000	2,052
2001	2,144
2002	2,715
2003	2,348
2004	3,324
2005	3,938
2006	3,878
2007	2,548
2008	1,485
2009	833
2010	780
2011	789
2012	1,075
2013	1,342
2014	1,404
2015	1,374
2016	985
2017	1,357



Note: Annual totals derived from seasonally-adjusted monthly totals. US recessions appear in gray bands.

Source: Federal Reserve Bank of St. Louis

Residential and Commercial Development Office, Industrial, and Retail Market Average Lease Rate & Vacancy Rate

Trend: Since 2016, lease rates for Office uses have averaged \$15.87 per SF, with an average quarterly vacancy rate of 4.7%. Industrial uses lease and vacancy rates averaged \$5.00 and 5.3%, respectively; Retail uses, \$13.78 and 3.7%.

Quarter	Office Average Rate	Office Vacancy Rate	Industrial Average Rate	Industrial Vacancy Rate	Retail Average Rate	Retail Vacancy Rate
2016-1	\$15.22	6.6%	\$4.87	6.9%	\$13.84	4.3%
2016-2	\$15.30	6.0%	\$4.90	6.1%	\$13.42	3.7%
2016-3	\$15.83	4.2%	\$4.83	5.8%	\$13.09	3.6%
2016-4	\$15.51	4.3%	\$4.82	5.6%	\$12.75	3.5%
2017-1	\$15.37	3.9%	\$5.09	4.6%	\$17.54	3.8%
2017-2	\$15.97	4.1%	\$5.04	4.5%	\$12.71	3.5%
2017-3	\$16.92	4.3%	\$5.21	4.3%	\$13.21	3.4%
2017-4	\$16.88	4.0%	\$5.27	5.1%	\$13.69	3.9%

Note: Average Rate (\$ per SF) is full lease for Office and NNN lease for Industrial and Retail, and includes both direct and sublet space.

Source: CoStar Property

Average Rate and Vacancy Rate, Tallahassee MSA



Residential and Commercial Development

New Elevators in Leon County

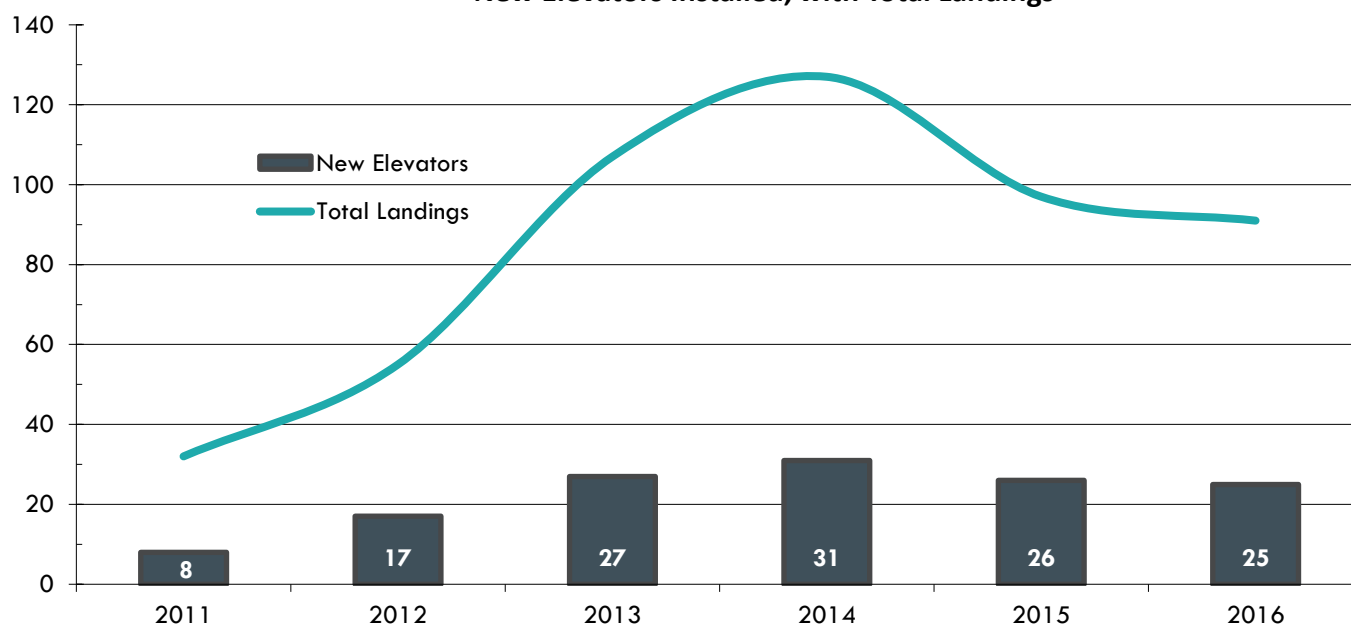
New Elevators Installed, with Total Landings by Building Type

Trend: Measuring how many new elevators have been installed each year helps in the overall assessment of development and redevelopment. It gives a basic approximation for intensity of commercial and institutional development, and also is an indicator of dense residential development.

Item	2011	2012	2013	2014	2015	2016
New Elevators	8	17	27	31	26	25
Total Landings	32	55	107	127	97	91
<i>Total Landings by Building Type:</i>						
Apartments		2				
Association			2			3
Church	4			6		
Commercial	2	27	10	15	15	12
Condominium				16	5	6
Federal Agency		2				
Food Service					3	
Hotel					8	
Local Government		2			3	
Medical		10			16	10
School		2	10		2	4
State Agency	3					
Student Housing		10	56	12	26	
Student Housing with Retail			25	25	10	
University	23		4	53	9	56

Source: Florida Department of Business and Professional Regulation

New Elevators Installed, with Total Landings



Economic Factors

Innovation:

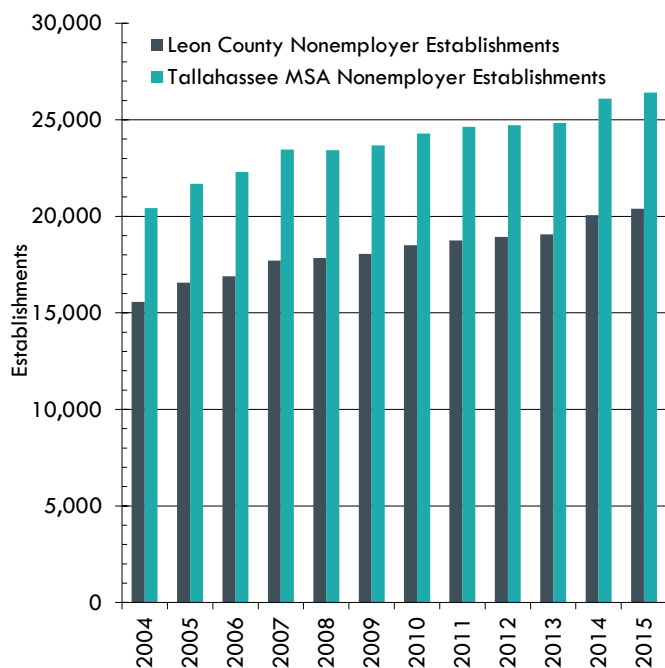
Nonemployer Statistics

Trend: Nonemployer Statistics is an annual series with data for businesses that have no paid employees and are subject to federal income tax. Most nonemployers are self-employed individuals operating as sole proprietorships, including solo entrepreneurs, which may or may not be the owner's principal source of income. The majority of all business establishments in the U.S. are nonemployers but due to their small economic impact, these firms are excluded from most other Census Bureau business statistics.

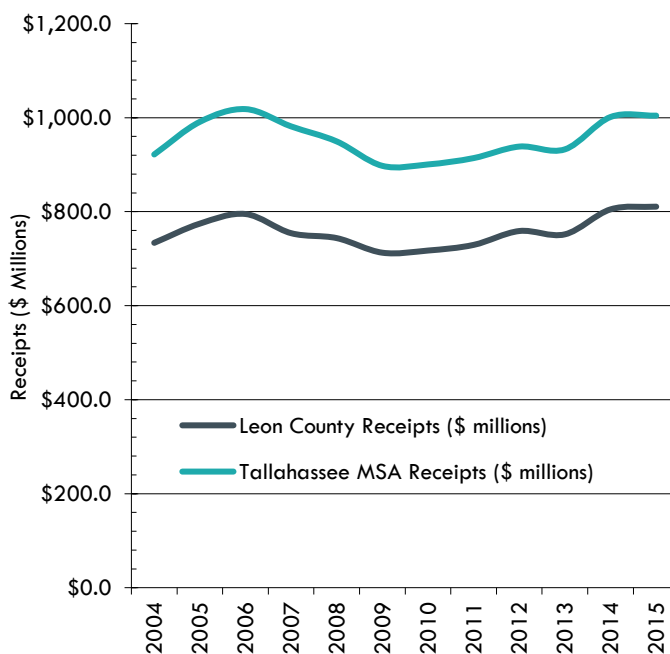
Year	Leon County Nonemployer Establishments	Leon County Receipts (\$ millions)	Tallahassee MSA Nonemployer Establishments	Tallahassee MSA Receipts (\$ millions)
2004	15,575	\$733.7	20,430	\$921.7
2005	16,568	\$774.5	21,683	\$991.1
2006	16,898	\$795.0	22,291	\$1,018.2
2007	17,700	\$754.2	23,452	\$981.4
2008	17,844	\$743.7	23,430	\$949.4
2009	18,054	\$712.7	23,672	\$897.5
2010	18,504	\$717.3	24,293	\$900.5
2011	18,749	\$729.3	24,636	\$914.0
2012	18,931	\$758.8	24,719	\$938.5
2013	19,062	\$751.8	24,838	\$932.6
2014	20,054	\$804.9	26,099	\$1,001.4
2015	20,385	\$810.6	26,408	\$1,004.3

Source: U.S. Census Bureau, Nonemployer Statistics

Nonemployer Establishments, 2004-2015



Nonemployer Receipts, 2004-2015





Economic Factors

Innovation:

SBIR/STTR Grants

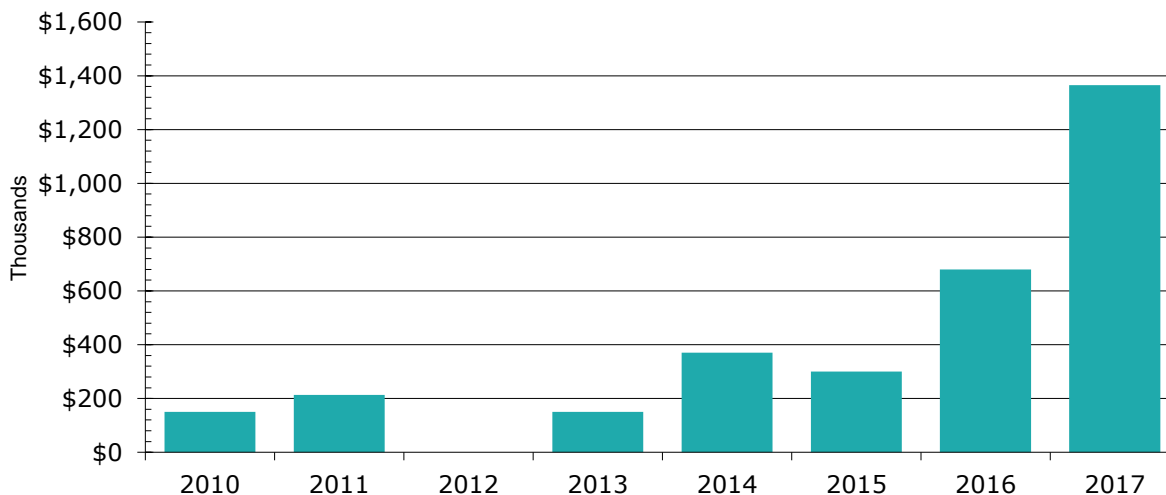
Trend: Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) are federal programs encouraging domestic small businesses to engage in research and development with potential for commercialization. Through competitive awards, SBIR and STTR help small businesses explore their technological potential and give incentive to profit from commercialization. Since 2010, Leon County firms have been awarded over \$3.2 million, with 54% coming from the Department of Energy and 37% from the National Science Foundation.

Year	Award Amount
2010	\$149,994
2011	\$213,304
2012	-
2013	\$149,681
2014	\$370,714
2015	\$299,999
2016	\$679,704
2017	\$1,365,509
2010-17	\$3,228,905

Awarding Agency	Percent Awards, 2010-2017
Department of Energy	53.8%
National Science Foundation	37.1%
Department of Health and Human Services	6.6%
Department of Defense	2.5%
Total	100.0%

Source: Small Business Innovation Research

SBIR/STTR Grant Awards, 2010-2017



Prior SBIR/STTR Awards	
Decade	Total Award Amount
1980s	\$294,685
1990s	\$1,038,105
2000s	\$5,106,704

Economic Factors

Innovation:

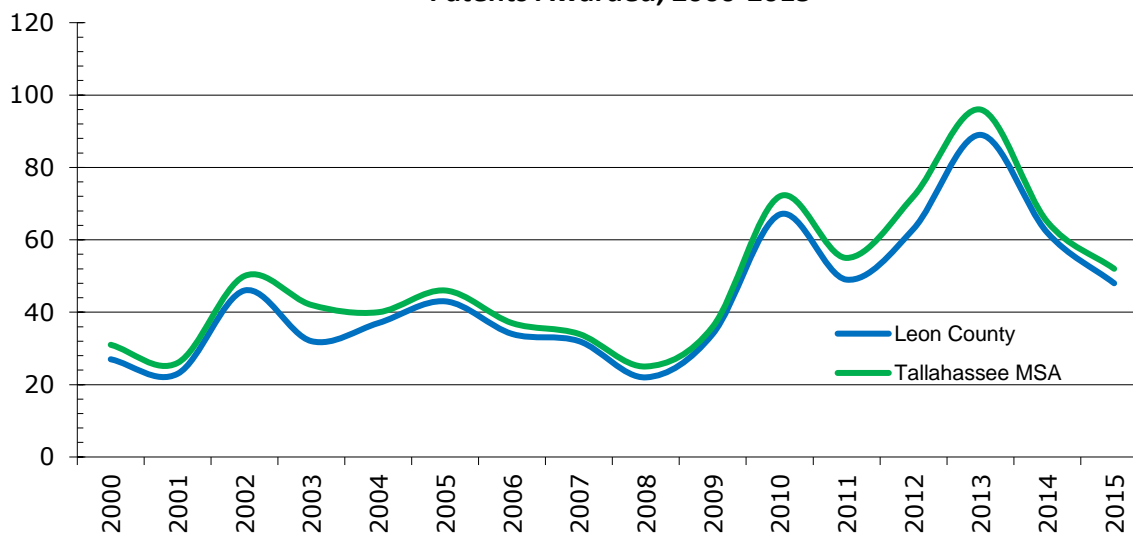
Patents Awarded Locally

Trend: The average annual number of patents awarded in Leon County during 2011-2015 was 62, up over 70% from an annual average of 36 during 2000-2010.

Year	Leon County	Tallahassee MSA	State of Florida	Leon County as Percent of Florida Patents	Tallahassee MSA as Percent of Florida Patents
2000	27	31	2,605	1.0%	1.2%
2001	23	26	2,649	0.9%	1.0%
2002	46	50	2,399	1.9%	2.1%
2003	32	42	2,561	1.2%	1.6%
2004	37	40	2,456	1.5%	1.6%
2005	43	46	2,291	1.9%	2.0%
2006	34	37	2,601	1.3%	1.4%
2007	32	34	2,358	1.4%	1.4%
2008	22	25	2,046	1.1%	1.2%
2009	34	36	2,198	1.5%	1.6%
2010	67	72	2,977	2.3%	2.4%
2011	49	55	3,136	1.6%	1.8%
2012	63	72	3,687	1.7%	2.0%
2013	89	96	3,954	2.3%	2.4%
2014	62	65	4,211	1.5%	1.5%
2015	48	52	4,053	1.2%	1.3%
2000-2015	708	779	46,182	1.5%	1.7%

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

Patents Awarded, 2000-2015



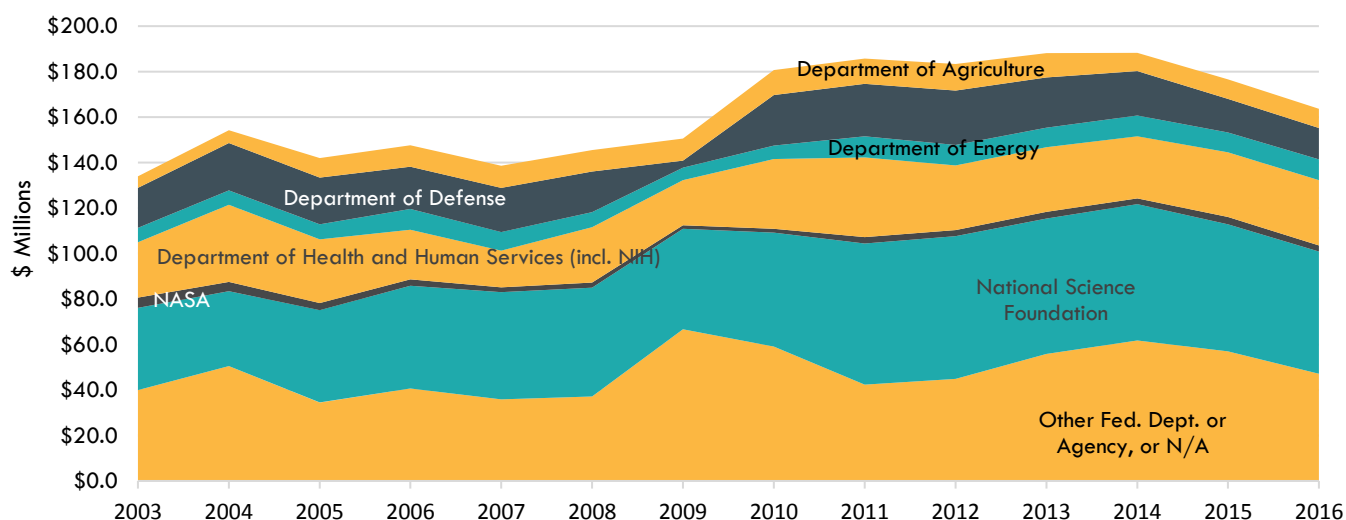
Federally Financed R&D and Total R&D Expenditures at FSU & FAMU (\$ Millions)

Trend: Between 2003 and 2016, federally financed R&D expenditures at FSU and FAMU in all fields averaged around \$162.8 million per year. R&D expenditures for the National Science Foundation at FSU and FAMU accounted for an average of 30% of the total; Health and Human Services, 16%. During 2003-2016, federally financed R&D accounted for over 65% of total R&D expenditures at FSU and FAMU. Total R&D expenditures increased by an average of 2.4% per year during the same period.

Year	Federally Financed R&D, by Agency							Total Federally Financed R&D at FSU & FAMU	Total R&D Expenditures at FSU & FAMU
	Department of Agriculture	Department of Defense	Department of Energy	Department of Health and Human Services (incl. NIH)	National Aeronautics and Space Administration	National Science Foundation	Other Fed. Dept. or Agency, or N/A		
2003	\$5.02	\$17.58	\$6.39	\$24.26	\$4.52	\$36.16	\$39.98	\$133.91	\$228.33
2004	\$5.63	\$20.79	\$6.38	\$33.81	\$4.15	\$32.90	\$50.55	\$154.21	\$246.91
2005	\$8.71	\$20.51	\$6.58	\$28.03	\$3.12	\$40.55	\$34.55	\$142.05	\$236.47
2006	\$9.48	\$18.54	\$9.17	\$21.75	\$2.80	\$45.19	\$40.68	\$147.61	\$246.68
2007	\$9.69	\$19.41	\$8.16	\$16.11	\$2.18	\$47.12	\$35.88	\$138.55	\$229.01
2008	\$9.41	\$17.98	\$6.52	\$24.33	\$2.36	\$47.80	\$37.16	\$145.56	\$237.07
2009	\$9.84	\$3.05	\$5.52	\$19.81	\$1.58	\$44.14	\$66.70	\$150.64	\$264.81
2010	\$10.96	\$22.20	\$5.94	\$30.61	\$1.73	\$50.08	\$59.15	\$180.67	\$280.80
2011	\$11.17	\$23.09	\$9.28	\$35.00	\$2.86	\$62.06	\$42.30	\$185.76	\$283.74
2012	\$11.66	\$23.88	\$8.99	\$28.54	\$2.58	\$62.76	\$44.94	\$183.35	\$277.64
2013	\$10.68	\$22.10	\$8.52	\$28.49	\$2.84	\$59.54	\$55.91	\$188.08	\$302.03
2014	\$8.03	\$19.51	\$9.11	\$27.35	\$2.52	\$59.97	\$61.77	\$188.26	\$298.92
2015	\$8.51	\$14.79	\$8.77	\$28.45	\$3.25	\$55.86	\$56.95	\$176.58	\$302.97
2016	\$8.38	\$13.84	\$9.13	\$28.72	\$2.71	\$53.69	\$47.18	\$163.65	\$313.68

Source: National Science Foundation, WebCASPAr Integrated Science and Engineering Resources Data System

Federally Financed R&D at FSU & FAMU in All Fields, by Federal Agency



**Federally Financed R&D and Total R&D Expenditures at FSU & FAMU
 (\$ Millions)**

