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## DATA DIGEST 2019

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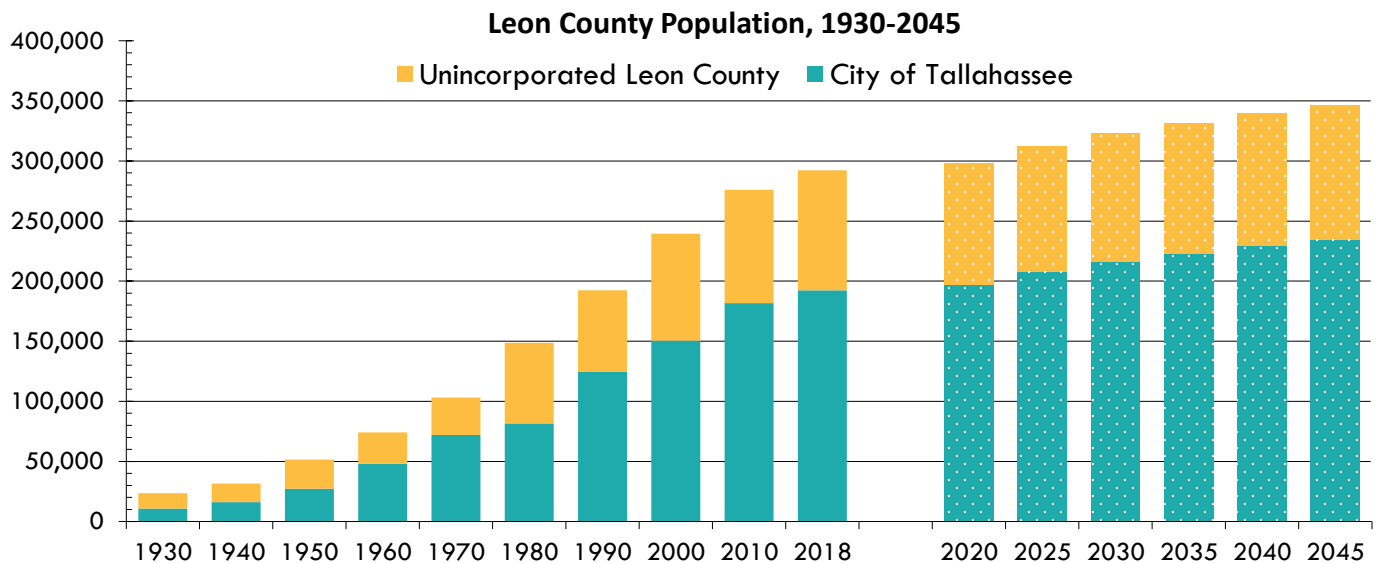
## Demographics

### Population: Estimates and Projections

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

Year	City of Tallahassee	Unincorporated Leon County	Leon County
1930	10,700	12,776	23,476
1940	16,240	15,406	31,646
1950	27,237	24,353	51,590
1960	48,174	26,051	74,225
1970	71,897	31,150	103,047
1980	81,548	67,107	148,655
1990	124,773	67,720	192,493
2000	150,624	88,828	239,452
2010	181,736	94,111	275,487
2018	192,381	99,951	292,332
2020	197,100	101,200	298,300
2025	207,800	104,100	311,900
2030	216,400	106,400	322,800
2035	223,300	108,200	331,500
2040	229,400	109,800	339,200
2045	234,800	111,200	346,000

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 2018 will continue throughout the projected time horizon).



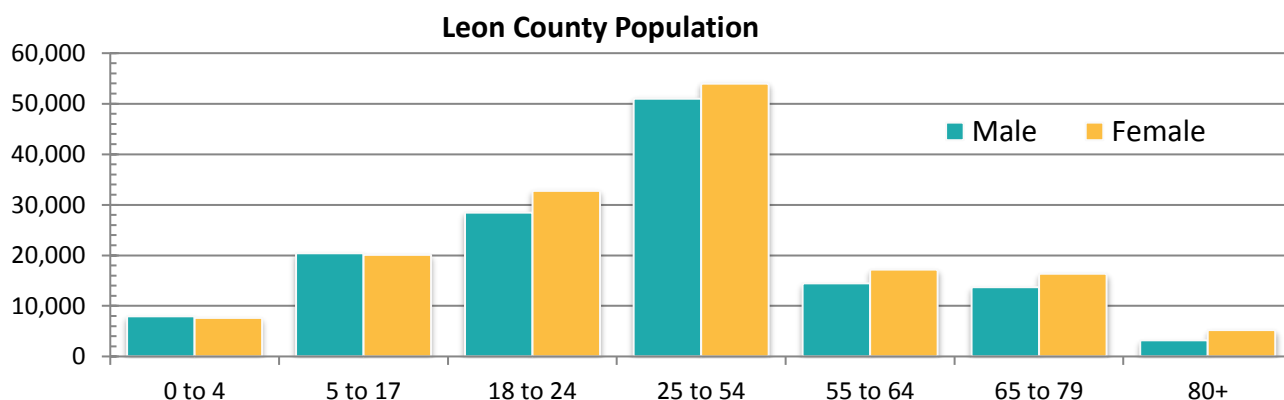


## Demographics

### 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 20.9% (behind Alachua County) and the fourth smallest percentage aged 65 and older at 13.2% (after Orange, Liberty, and Union counties) in the State of Florida.

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	15,522	5.3%	7,606	2.6%	7,916	2.7%
5 to 17	40,520	13.9%	20,083	6.9%	20,437	7.0%
18 to 24	61,212	20.9%	32,749	11.2%	28,463	9.7%
25 to 54	104,973	35.9%	53,989	18.5%	50,984	17.4%
55 to 64	31,640	10.8%	17,207	5.9%	14,433	4.9%
65 to 79	30,049	10.3%	16,346	5.6%	13,703	4.7%
80+	8,416	2.9%	5,210	1.8%	3,206	1.1%
Total	292,332	100.0%	153,190	52.4%	139,142	47.6%



Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 184", June 2019



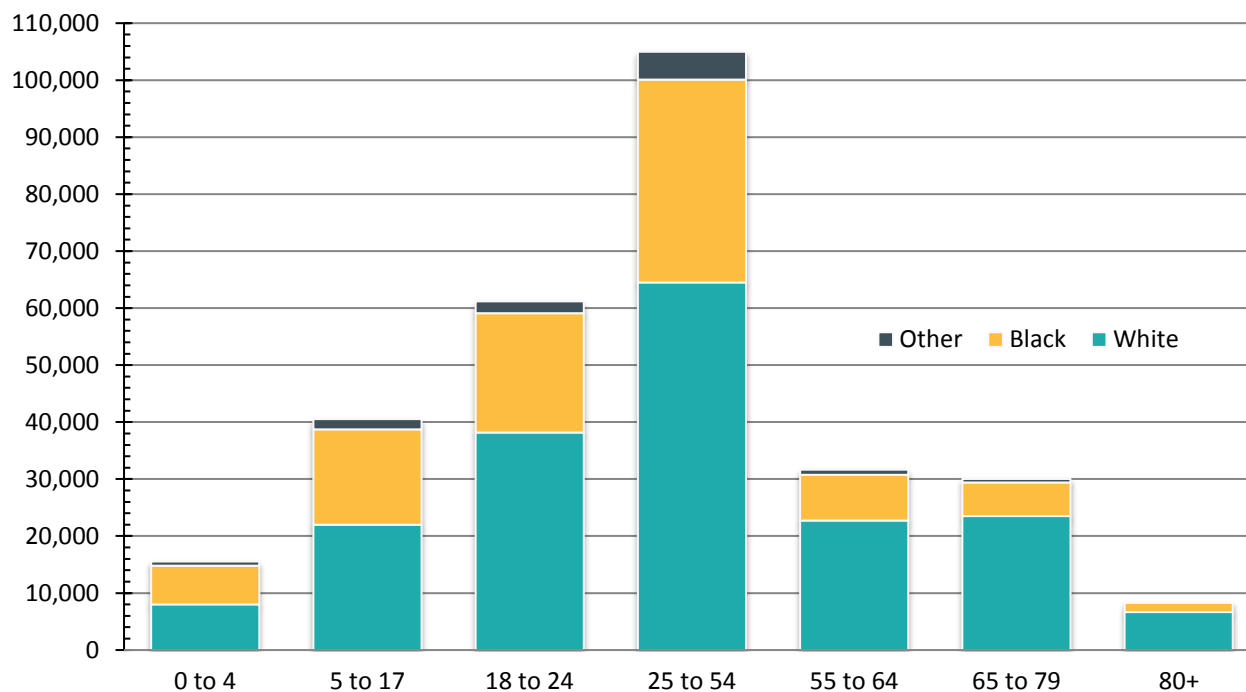
Trend: By race and ethnicity, Leon County's population includes 63.5% White, 32.7% Black, and 3.8% Other Races. Also, 6.3% of Leon County residents are of Hispanic origin.

Age Group	All Races	White	Black	Other	Hispanic Origin*
0 to 4	15,522	8,026	6,758	738	1,088
5 to 17	40,520	21,967	16,772	1,781	3,057
18 to 24	61,212	38,187	20,937	2,088	5,626
25 to 54	104,973	64,504	35,596	4,873	6,430
55 to 64	31,640	22,724	8,013	903	1,202
65 to 79	30,049	23,536	5,866	647	903
80+	8,416	6,670	1,623	123	227
Total	292,332	185,614	95,565	11,153	18,533

\*"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 184, June 2019"

**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, 60.7% 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 (2010-2018)	16,845	19,423	2,039,236
Net Natural Increase	10,230	11,441	270,336
Births	24,411	32,636	1,748,679
Deaths	14,181	21,195	1,478,343
Net Migration	6,615	7,982	1,768,900
Percent due to Natural Increase	60.7%	58.9%	13.3%
Percent due to Net Migration	39.3%	41.1%	86.7%

Source: University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2018



## Demographics

### Population:

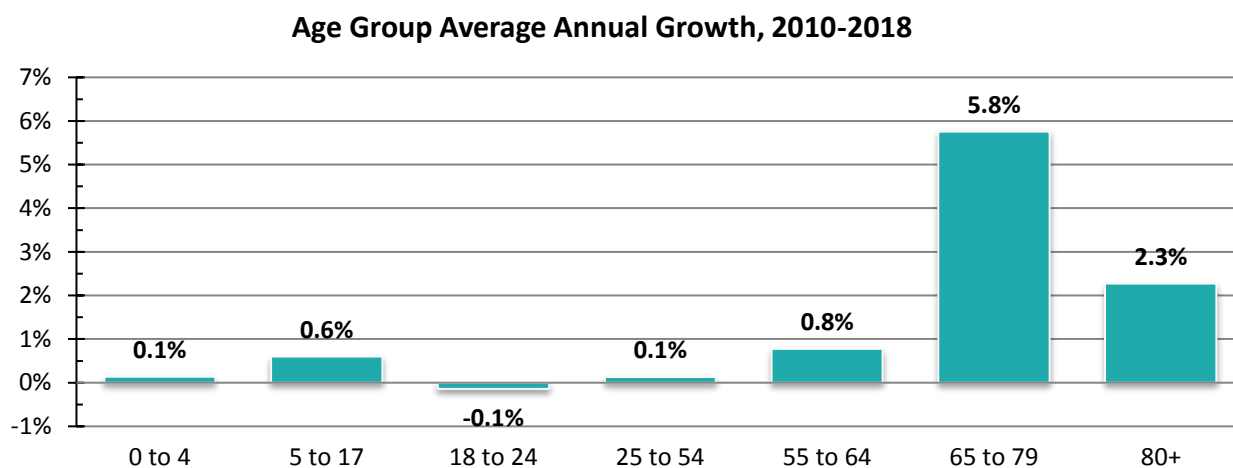
### Growth by Age Group

Trend: Although the 65-79 age group represents 10.6% of Leon County's total population, it is the fastest growing age group, growing at an annual rate of nearly 6% per year during 2010-2018.

Age Group	2010 Population	2018 Population Estimate	Growth in Population 2010-2018	Percent Growth 2010-2018	Avg. Ann. Growth 2010-2018
0 to 4	15,350	15,522	172	1.1%	0.1%
5 to 17	38,623	40,520	1,897	4.8%	0.6%
18 to 24	61,897	61,212	-685	-1.1%	-0.1%
25 to 54	103,907	104,973	1,066	1.0%	0.1%
55 to 64	29,730	31,640	1,910	6.2%	0.8%
65 to 79	18,962	30,049	11,087	46.0%	5.8%
80+	7,018	8,416	1,398	18.2%	2.3%
Total	275,487	284,443	8,956	3.2%	0.4%

Age Dependency Ratio\*      40.9      47.8

\*Ratio of population under age 18 and those age 65 and older, compared to population ages 18-64.



Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 184", June 2019



## Demographics

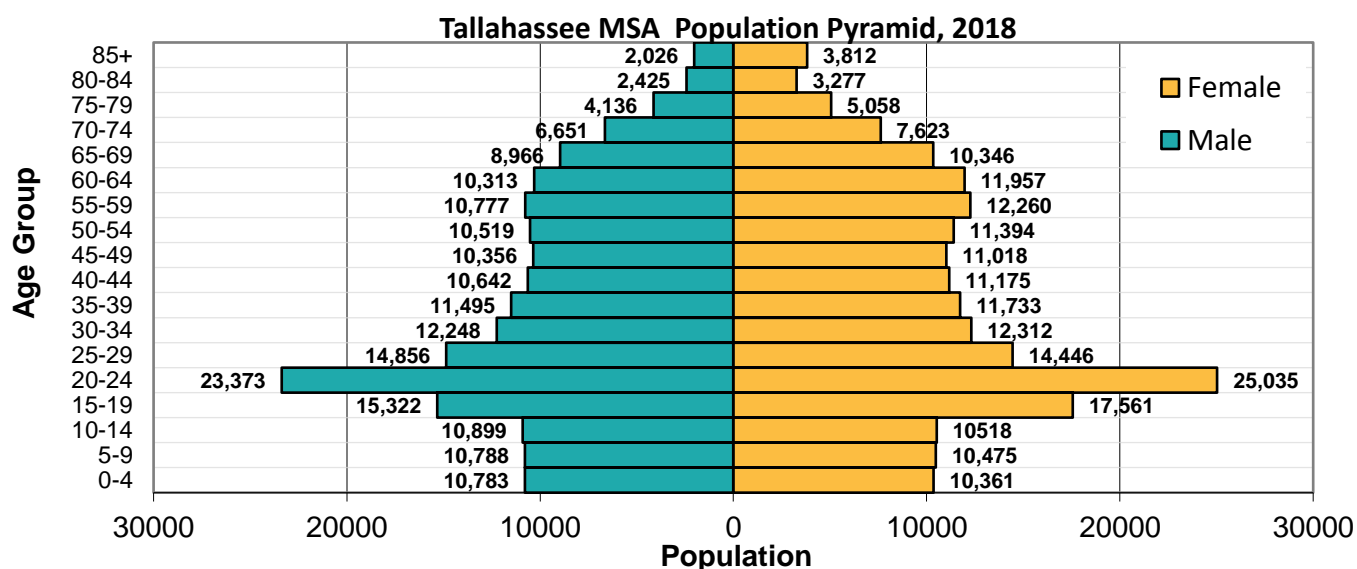
### Population:

### 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	21,144	5.5%	10,361	2.7%	10,783	2.8%
5 to 9	21,263	5.5%	10,475	2.7%	10,788	2.8%
10 to 14	21,417	5.5%	10,518	2.7%	10,899	2.8%
15 to 19	32,883	8.5%	17,561	4.5%	15,322	4.0%
20 to 24	48,308	12.5%	25,035	6.5%	23,273	6.0%
25 to 29	29,302	7.6%	14,446	3.7%	14,856	3.8%
30 to 34	24,560	6.3%	12,312	3.2%	12,248	3.2%
35 to 39	23,228	6.0%	11,733	3.0%	11,495	3.0%
40 to 44	21,817	5.6%	11,175	2.9%	10,642	2.8%
45 to 49	21,374	5.5%	11,018	2.8%	10,356	2.7%
50 to 54	21,913	5.7%	11,394	2.9%	10,519	2.7%
55 to 59	23,037	6.0%	12,260	3.2%	10,777	2.8%
60 to 64	22,270	5.8%	11,957	3.1%	10,313	2.7%
65 to 69	19,312	5.0%	10,346	2.7%	8,966	2.3%
70 to 74	14,274	3.7%	7,623	2.0%	6,651	1.7%
75 to 79	9,194	2.4%	5,058	1.3%	4,136	1.1%
80 to 84	5,702	1.5%	3,277	0.8%	2,425	0.6%
85+	5,838	1.5%	3,812	1.0%	2,026	0.5%
Total	386,836	100.0%	200,361	51.8%	186,475	48.2%

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 184", June 2019





## Demographics

### Population:

### Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was 386,836 in 2018, up 5.3% from 2010.

Metropolitan Area/County(ies)	2018 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2000-2010
All Metropolitan Areas	20,149,019	18,119,272	15,357,198	18.0%
Miami-Fort Lauderdale-West Palm Beach (Broward, Miami-Dade, Palm Beach)	6,110,715	5,564,657	5,007,988	11.1%
Tampa-St. Petersburg-Clearwater (Hernando, Hillsborough, Pasco, Pinellas)	3,080,077	2,783,243	2,396,013	16.2%
Orlando-Kissimmee-Sanford (Lake, Orange, Osceola, Seminole)	2,508,570	2,134,411	1,644,563	29.8%
Jacksonville (Baker, Clay, Duval, Nassau, St. Johns)	1,514,037	1,345,596	1,122,750	19.8%
North Port-Sarasota-Bradenton (Manatee, Sarasota)	795,268	702,281	589,963	19.0%
Cape Coral-Fort Myers (Lee)	713,903	618,754	440,888	40.3%
Lakeland-Winter Haven (Polk)	673,028	602,095	483,924	24.4%
Deltona-Daytona Beach-Ormond Beach (Volusia, Flagler)	638,573	590,289	493,175	19.7%
Palm Bay-Melbourne-Titusville (Brevard)	583,563	543,376	476,230	14.1%
Pensacola-Ferry Pass-Brent (Escambia, Santa Rosa)	493,447	448,991	412,153	8.9%
Port St. Lucie (Martin, St. Lucie)	457,988	424,107	319,426	32.8%
Tallahassee (Gadsden, Jefferson, Leon, Wakulla)	386,836	367,413	320,304	14.7%
Naples-Immokalee-Marco Island (Collier)	367,347	321,520	251,377	27.9%
Ocala (Marion)	353,898	331,303	258,916	28.0%
Gainesville (Alachua, Gilchrist)	321,769	305,076	266,842	14.3%
Crestview-Fort Walton Beach-Destin (Okaloosa, Walton)	265,808	235,865	211,099	11.7%
Panama City (Bay)	181,199	168,852	148,217	13.9%



## Demographics

### Population:

### Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was 386,836 in 2018, up 5.3% from 2010.

Metropolitan Area/County(ies)	2018 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2000-2010
Punta Gorda (Charlotte)	177,987	159,978	141,627	13.0%
Sebastian-Vero Beach (Indian River)	148,962	138,028	112,947	22.2%
Homosassa Springs (Citrus)	143,801	141,236	118,085	19.6%
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, 2018



## 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, 2018		Census April 1, 2010		Census April 1, 2000	
	Households	Average Household Size	Households	Average Household Size	Households	Average Household Size
Leon County	118,978	2.33	110,945	2.35	96,521	2.34
Florida	8,271,058	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 182", December 2018;  
U.S. Department of Commerce, Bureau of the Census, Census 2010

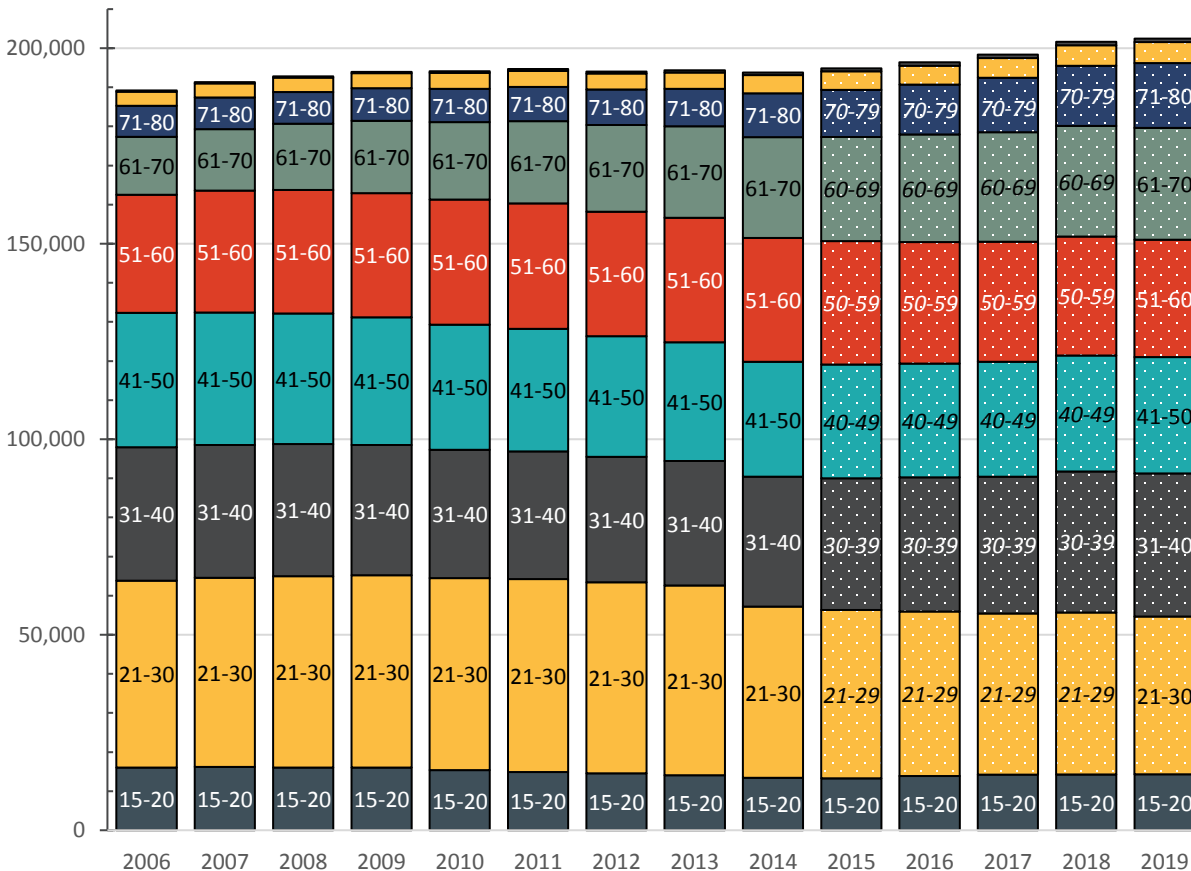
Trend: Between 2006 and 2019, the proportion of drivers licensed in Leon County age 60 or older increased from 14% to over 25%, while the proportion age 30 or younger decreased from 34% to 27%.

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
2019	14,311	<i>40,353</i>	<i>36,596</i>	<i>29,752</i>	<i>30,015</i>	<i>28,593</i>	<i>16,580</i>	<i>5,403</i>	<i>883</i>	106,411	96,075

Source: Florida Department of Highway Safety and Motor Vehicles.

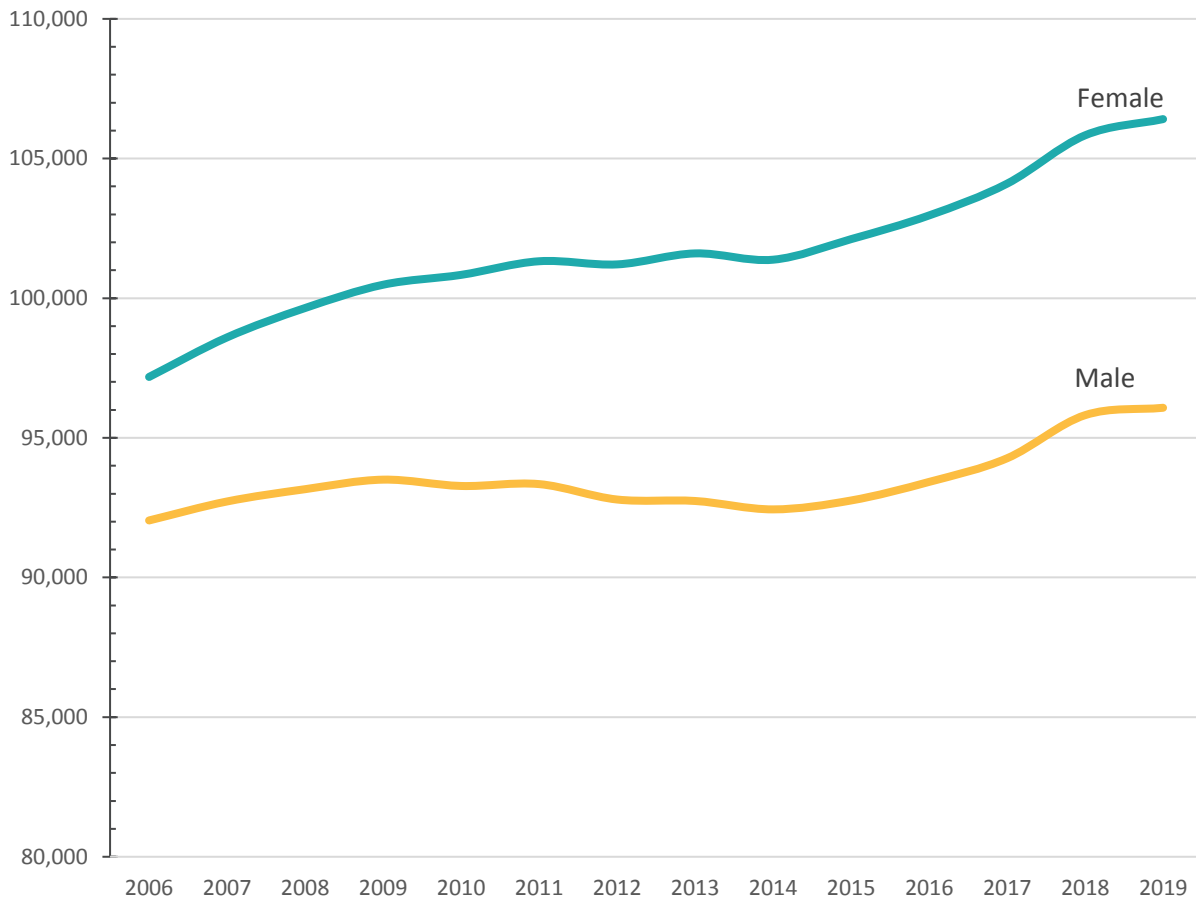
Note: Italics above indicates changes to age groups made in 2015. Ages 21-30 group became Ages 21-29, Ages 31-40 group became Ages 30-39, etc.

**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 (Fall 2017)

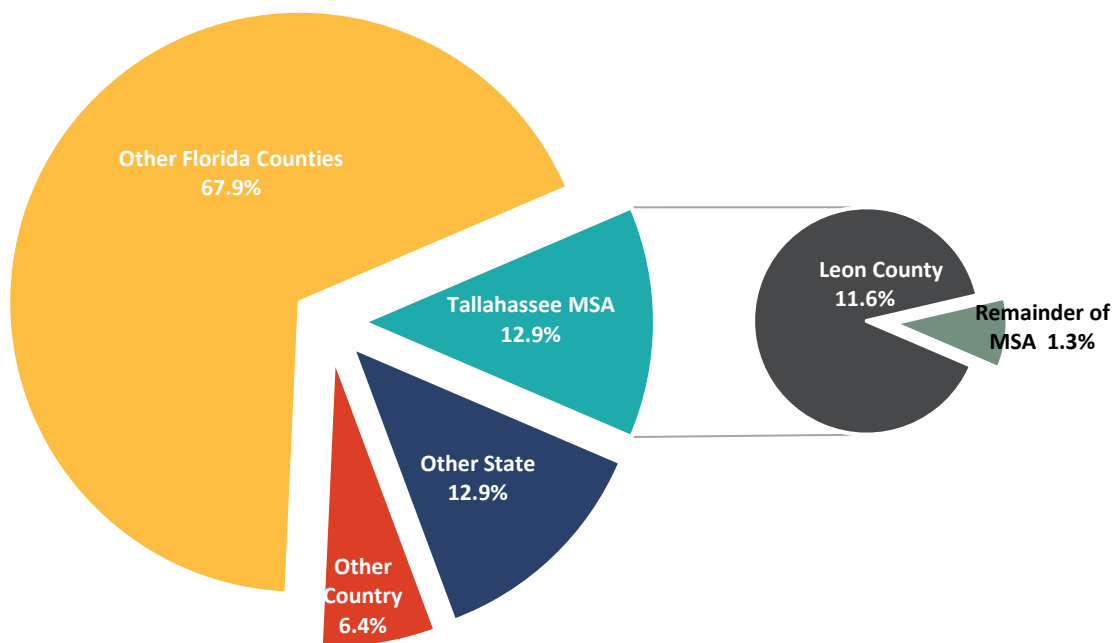
Trend: Over 80% of FSU and FAMU students are Florida residents, with the Tallahassee metro area accounting for about 13%. Broward, Miami-Dade, and Palm Beach counties together account for nearly 24% of students.

Place of Origin	Students	Percent of Total
Florida	42,220	80.8%
Tallahassee MSA	6,724	12.9%
Leon County	6,056	11.6%
Remainder of Tallahassee MSA	668	1.3%
Outside Tallahassee MSA	35,496	67.9%
Broward	4,815	9.2%
Miami-Dade	4,003	7.7%
Palm Beach	3,482	6.7%
Remainder of Florida Counties	23,196	44.4%
Other State	6,722	12.9%
Georgia	1,399	2.7%
New York	432	0.8%
New Jersey	379	0.7%
Remainder of Other States	4,512	8.6%
Other Country	3,334	6.4%
China	590	1.1%
India	197	0.4%
Panama	334	0.6%
Remainder of Other Countries	2,213	4.2%

Note: Does not include <1% missing data. Category percentages may not sum due to rounding.

Source: State University System of Florida, Board of Governors, Student Instruction File, Fall 2017

### Origins of FSU and FAMU Students, Fall 2017



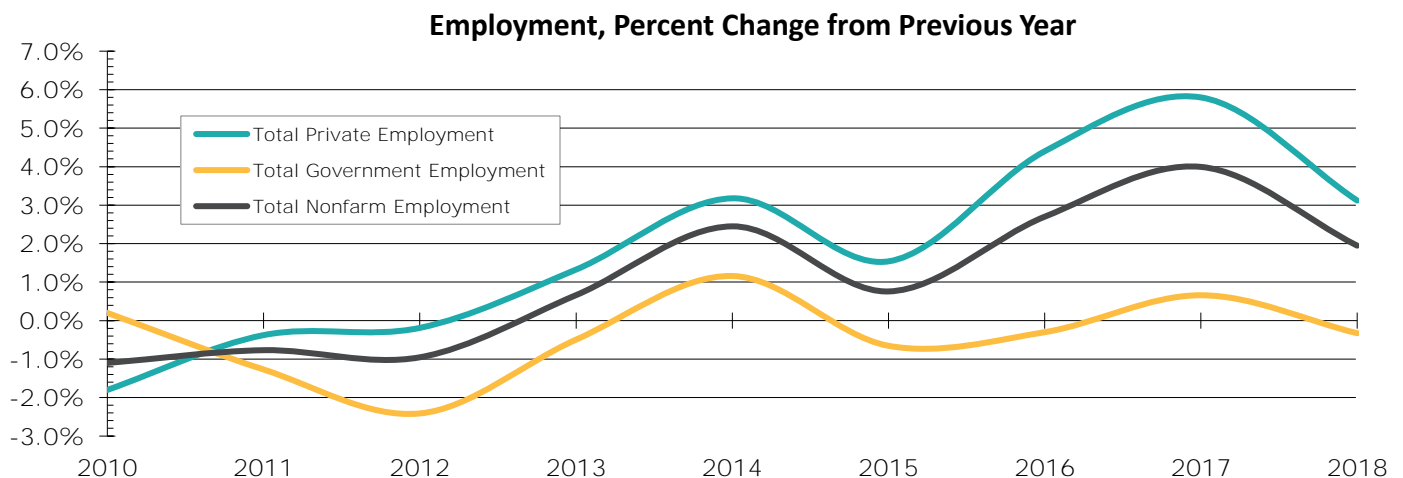
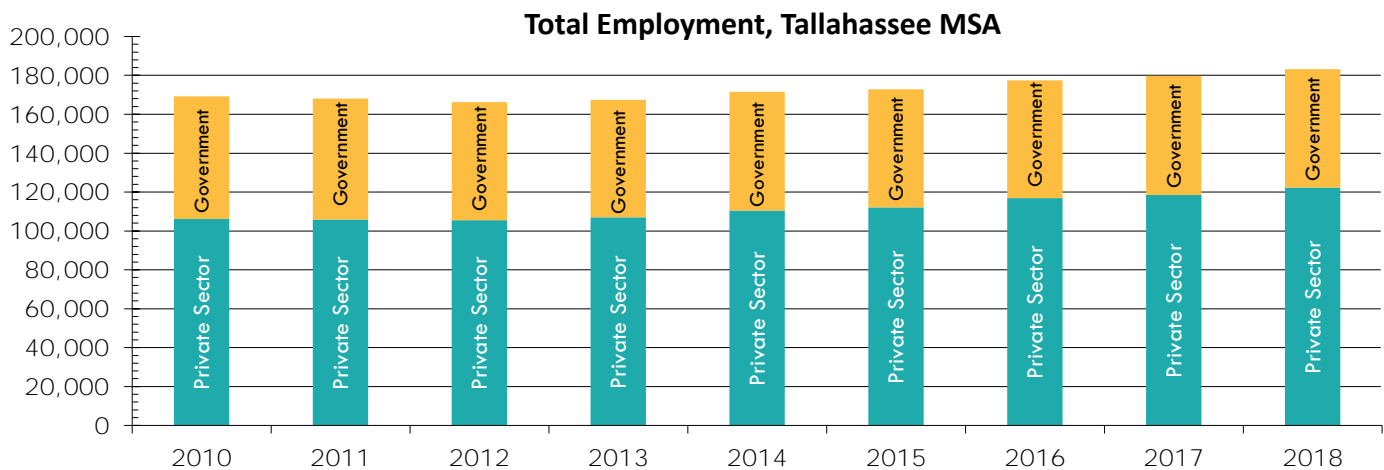


## Workforce and Income Employment

Trend: Total non-farm employment growth for the Tallahassee MSA for 2018 was 1.9%, a net increase of 3,500 jobs. Total private employment was up 3.1% (gain of 3,700 jobs) in 2018 while government employment was down 0.3% over the year (loss of 200 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	5.8%	61,100	0.7%	179,700	4.0%
2018	122,300	3.1%	60,900	-0.3%	183,200	1.9%

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 2018 stood at 3.3% (3.4% for the Tallahassee MSA and 3.5% 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%
2018	3.3%	3.4%	3.5%	3.9%

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



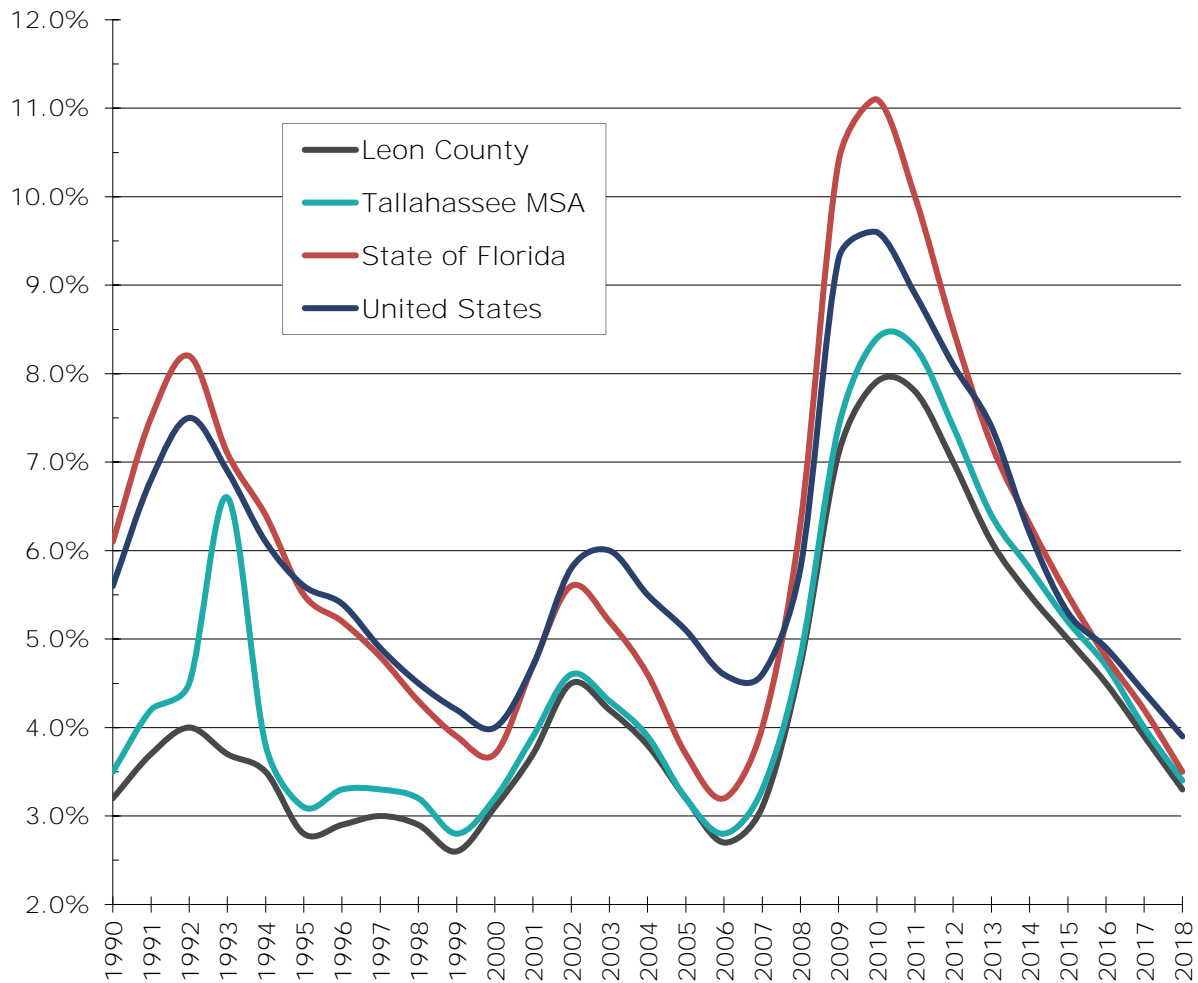
## Workforce and Income

### 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 2018 stood at 3.3% (3.4% for the Tallahassee MSA and 3.5% for the State of Florida).

**Average Annual Unemployment Rate**



## Workforce and Income

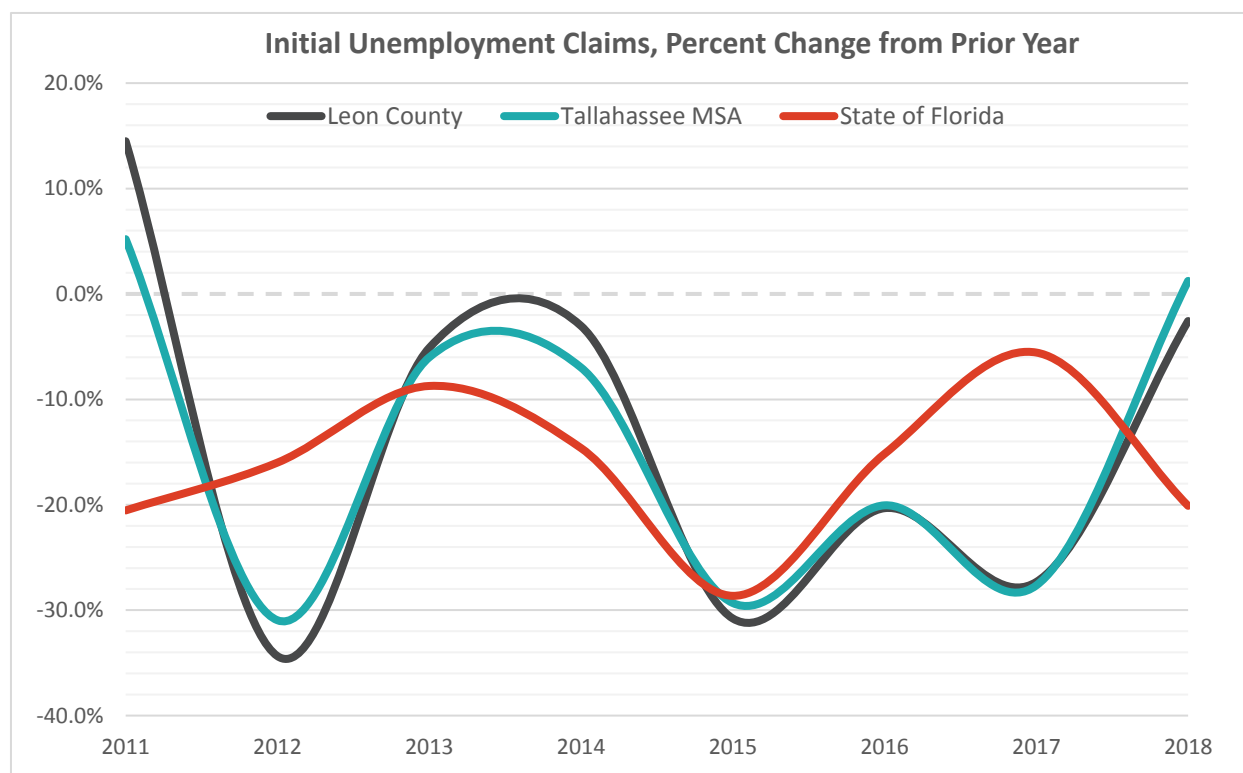
### Initial Claims for Unemployment Compensation

Trend: Initial claims for unemployment compensation declined for the seventh straight year in 2018.

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	-27.3%	5,419	-27.7%	401,324	-5.6%
2018	4,017	-2.6%	5,486	1.2%	320,652	-20.1%

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

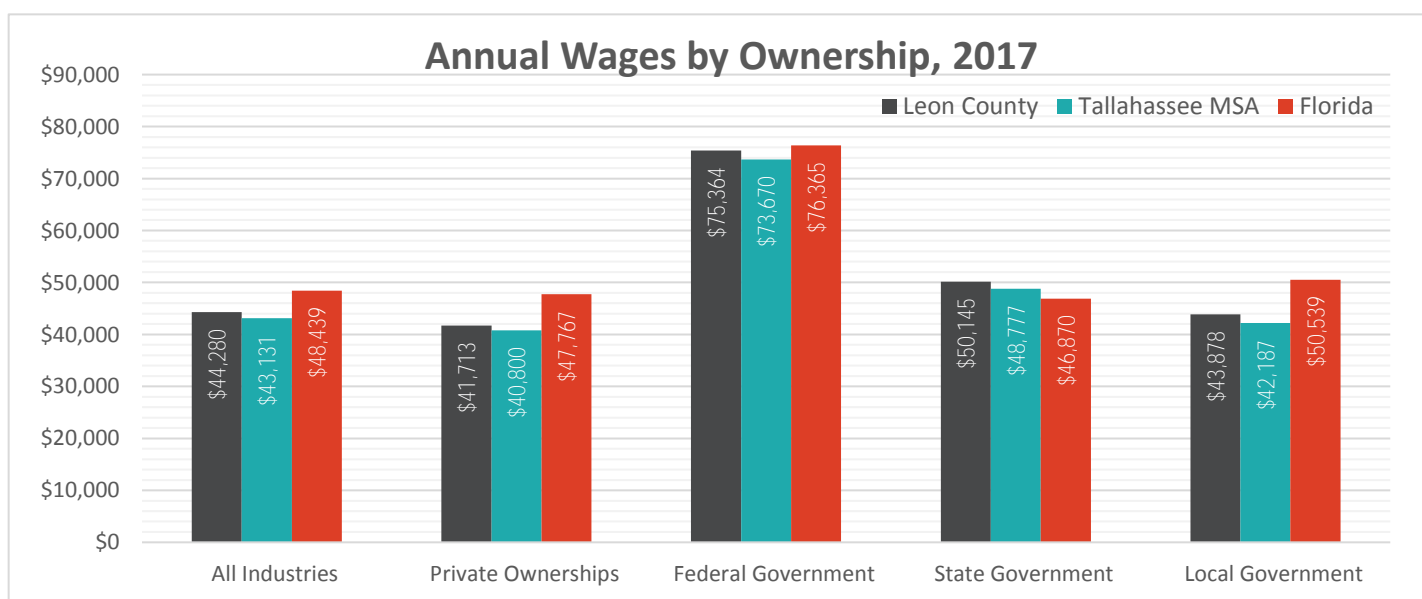
### Average Annual Employment/Wages

#### Annual Average Employment and Wages by Ownership

Trend: The average annual wage in Leon County in 2017 was \$44,280, 8.6% below the state average wage of \$48,439. The annual average state government wage was 7.0% higher in Leon County compared to the state average while the local government wage in Leon County was 13.2% lower than the state's average.

Ownership Type	Annual Establishments	Annual Average Employment	Annual Average Weekly Wage	Annual Wages Per Employee
<b>Leon County</b>				
All Industries	8,657	148,190	\$852	\$44,280
Private Ownerships	8,401	99,856	\$802	\$41,713
Federal Government	47	1,837	\$1,449	\$75,364
State Government	184	34,782	\$964	\$50,145
Local Government	25	11,715	\$844	\$43,878
<b>Tallahassee MSA</b>				
All Industries	10,326	169,304	\$829	\$43,131
Private Ownerships	9,959	114,107	\$785	\$40,800
Federal Government	73	2,049	\$1,417	\$73,670
State Government	239	38,485	\$938	\$48,777
Local Government	55	14,664	\$811	\$42,187
<b>Florida</b>				
All Industries	674,831	8,493,498	\$932	\$48,439
Private Ownerships	668,741	7,436,299	\$919	\$47,767
Federal Government	2,013	138,939	\$1,469	\$76,365
State Government	2,496	221,427	\$901	\$46,870
Local Government	1,581	696,833	\$972	\$50,539

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





## Workforce and Income

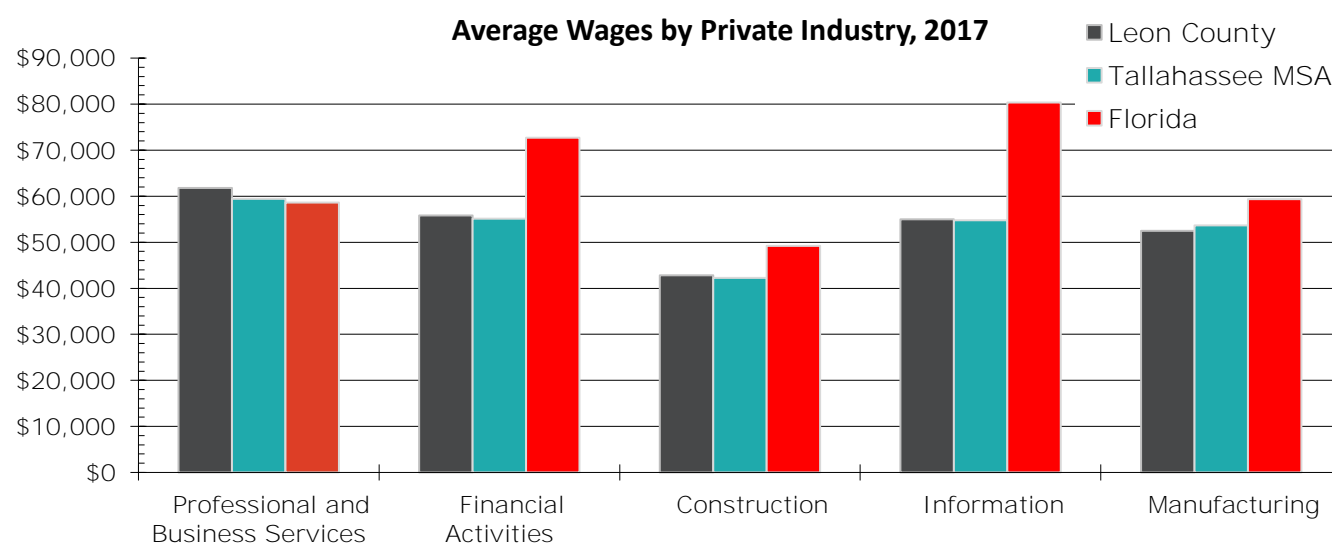
### Average Annual Employment/Wages

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

Trend: The average private sector annual wage in Leon County in 2017 was \$41,713, 12.7% below the state average private wage of \$47,767. By industry type, Leon County's private average annual wage ranged from 31.6% lower than the state average for the Information industry sector to 5.5% 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
<b>Leon County</b>			
Professional and Business Services	2,220	17,116	\$61,823
Financial Activities	900	7,034	\$55,842
Construction	747	5,757	\$42,830
Information	170	3,063	\$54,966
Manufacturing	127	1,727	\$52,464
<b>Tallahassee MSA</b>			
Professional and Business Services	2,431	18,851	\$59,432
Financial Activities	990	7,411	\$55,114
Construction	1018	7,285	\$42,293
Information	184	3,191	\$54,794
Manufacturing	167	3,141	\$53,674
<b>Florida</b>			
Professional and Business Services	157,218	1,322,541	\$58,623
Financial Activities	71,685	556,499	\$72,682
Construction	67,503	503,864	\$49,218
Information	11,004	138,040	\$80,335
Manufacturing	20,537	363,039	\$59,370

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



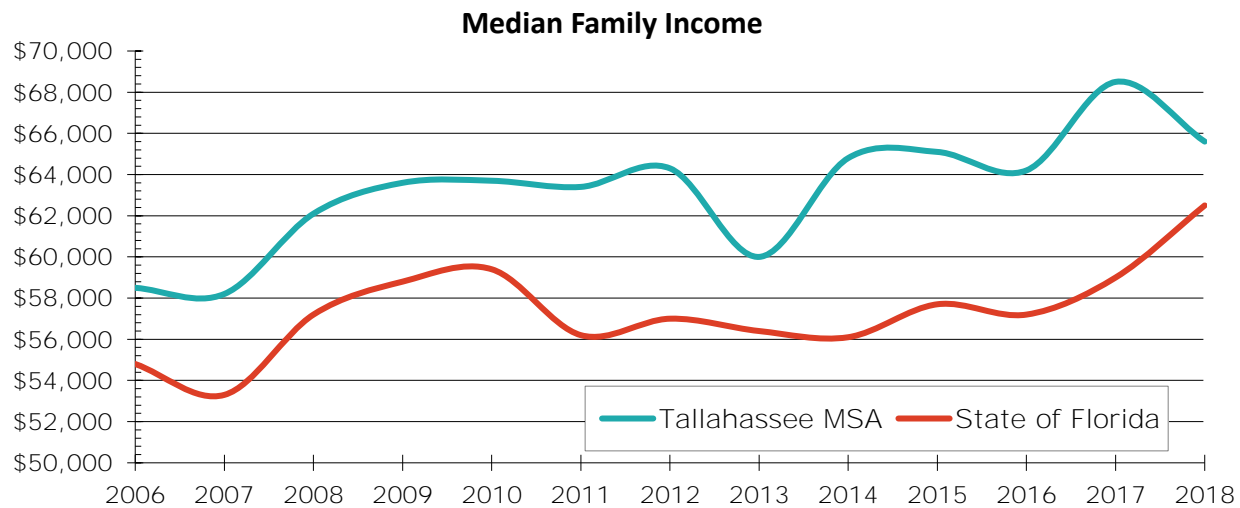


Trend: Median family income for the Tallahassee metro area was \$65,600 in 2018, according to the Federal Financial Institutions Examination Council. The median family income in 2017 in Leon County was \$72,816 according to the Census Bureau's 2013-2017 5-Year American Community Survey.

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	\$64,200	\$57,200	11.5% higher
2017	\$68,500	\$59,000	14.9% higher
2018	\$65,600	\$62,500	4.8% 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 2017, by jurisdiction

	2017
Leon County	\$72,816
Tallahassee MSA*	\$66,913
City of Tallahassee	\$65,376
Florida	\$61,442

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

Source: U.S. Census Bureau, 2013-2017 5-Year American Community Survey  
Tallahassee-Leon County  
Office of Economic Vitality



## Demographics

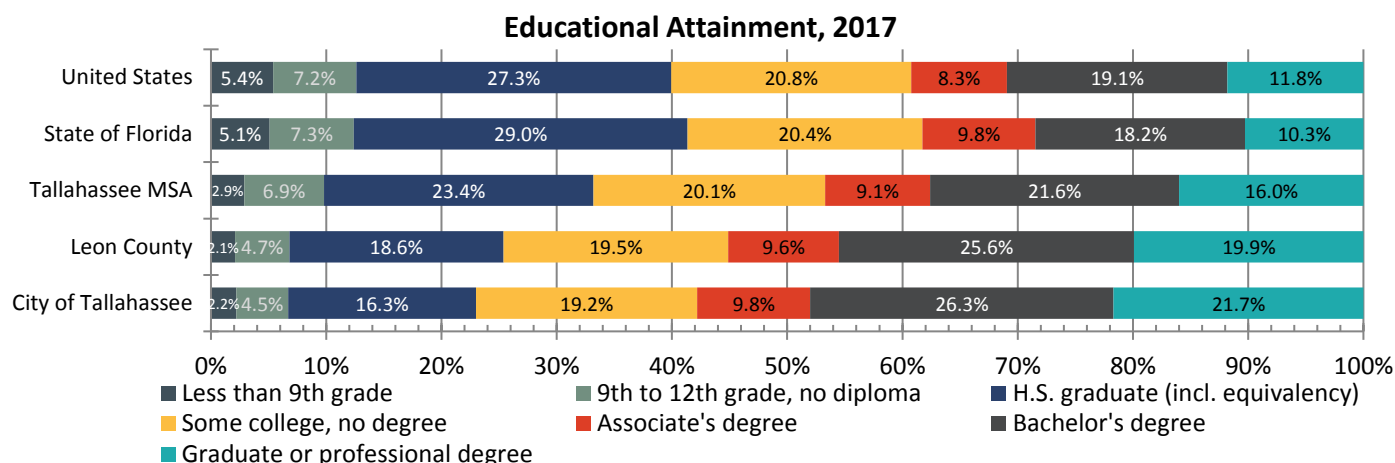
### Population:

### Educational Attainment

Trend: The level of educational attainment has steadily increased in Leon County. As of 2017, 45.5% of Leon County residents 25 years and over had obtained a Bachelor's degree or higher, up from 41.7% in 2000. In comparison, 28.5% of State of Florida residents and 30.9% of US residents 25 years and over had obtained a Bachelor's degree or higher. Some 48% of Tallahassee residents had a bachelor's degree or higher.

Educational Attainment Level as of 2017*	City of Tallahassee	Leon County	Tallahassee MSA	State of Florida	United States
Less than 9th grade	2.2%	2.1%	2.9%	5.1%	5.4%
9th to 12th grade, no diploma	4.5%	4.7%	6.9%	7.3%	7.2%
H.S. graduate (incl. equivalency)	16.3%	18.6%	23.4%	29.0%	27.3%
Some college, no degree	19.2%	19.5%	20.1%	20.4%	20.8%
Associate's degree	9.8%	9.6%	9.1%	9.8%	8.3%
Bachelor's degree	26.3%	25.6%	21.6%	18.2%	19.1%
Graduate or professional degree	21.7%	19.9%	16.0%	10.3%	11.8%

\* Population 25 years and older.



Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2013-2017

### 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, 2013-2018

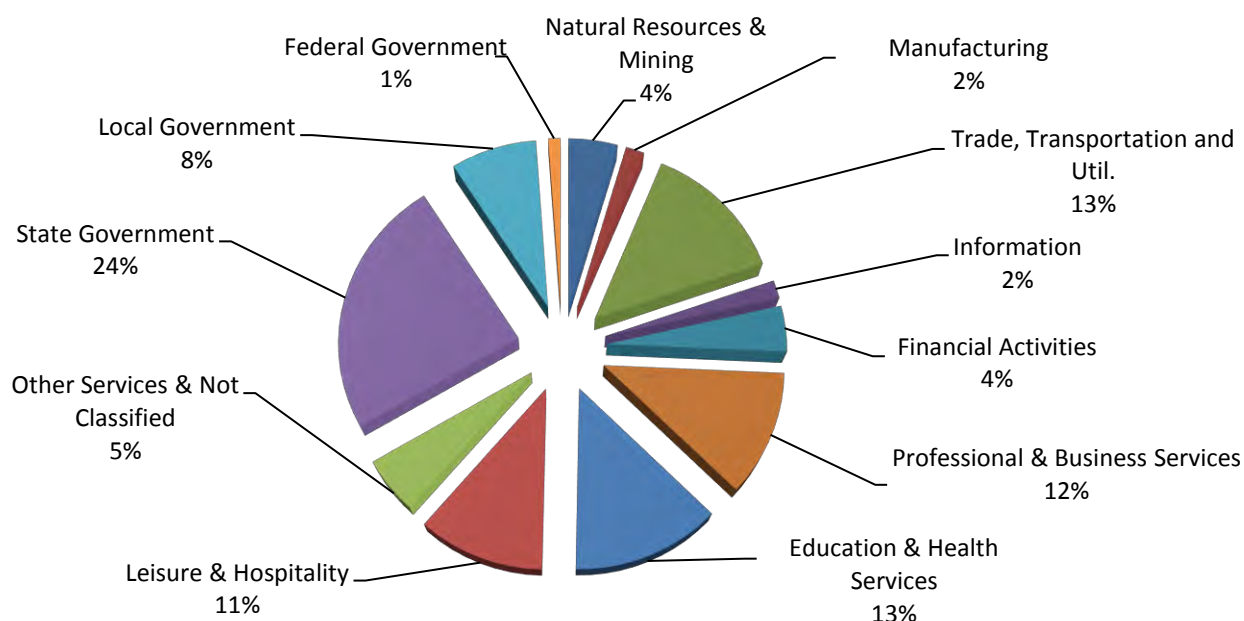
Trend: Private sector job growth in 2018 was led by gains in Professional & Business Services (1,100 jobs) and Education & Health Services (800 jobs).

Industry Type	2013	2014	2015	2016	2017	2018	Avg. Ann. Rate Change 2013-2018
Mining, Logging & Construction	6,200	6,300	6,700	7,500	7,700	8,400	6.1%
Manufacturing	3,100	2,900	3,100	3,100	3,200	3,200	0.6%
Trade, Transportation and Util.	22,800	23,700	24,200	24,400	24,300	24,800	1.7%
Information	3,400	3,900	3,500	3,200	3,400	3,100	-1.8%
Financial Activities	7,300	7,100	7,000	7,500	7,800	7,900	1.6%
Professional & Business Services	18,500	19,000	19,000	20,300	20,300	21,400	2.9%
Education & Health Services	19,700	20,600	21,100	21,800	23,200	24,000	3.9%
Leisure & Hospitality	17,200	17,900	18,700	19,600	19,800	20,400	3.4%
Other Services & Not Classified	8,800	9,000	8,900	9,400	8,900	9,600	1.7%
State Government	42,800	43,900	43,500	43,200	44,000	44,800	0.9%
Local Government	15,600	15,200	15,200	15,300	15,000	14,700	-1.2%
Federal Government	2,000	1,900	1,900	2,000	2,100	2,100	1.0%
Total	167,400	171,400	172,800	177,300	179,700	184,400	1.9%

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 (2018)





## Workforce and Income

### Projected Employment by Occupation:

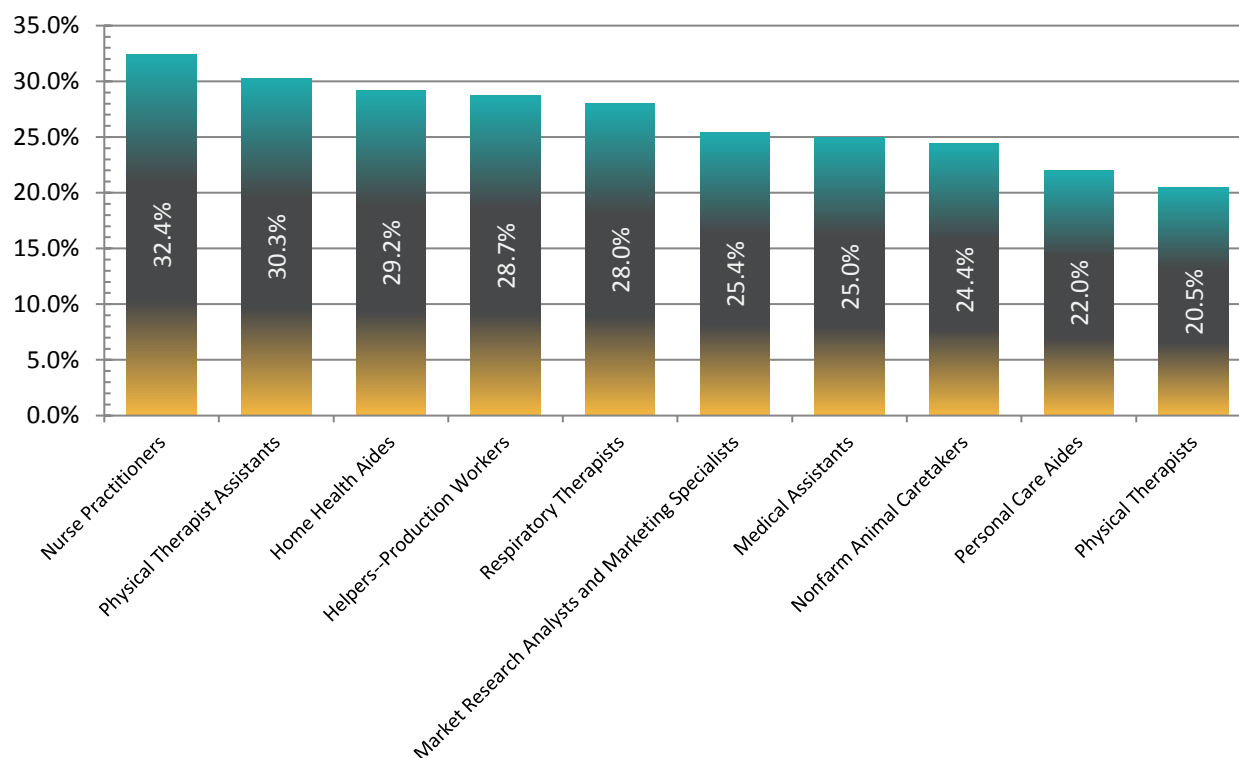
### Fastest Growing Occupations in Leon County (2018-2026)

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

Industry	2018 Emp.	2026 Emp.	Total Emp. Change	Percent Growth
Nurse Practitioners	148	196	48	32.4%
Physical Therapist Assistants	162	211	49	30.3%
Home Health Aides	493	637	144	29.2%
Helpers--Production Workers	101	130	29	28.7%
Respiratory Therapists	143	183	40	28.0%
Market Research Analysts and Marketing Specialists	586	735	149	25.4%
Medical Assistants	532	665	133	25.0%
Nonfarm Animal Caretakers	180	224	44	24.4%
Personal Care Aides	491	599	108	22.0%
Physical Therapists	258	311	53	20.5%

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

### Fastest Growing Occupations, Percent Growth 2018-2026





## Workforce and Income

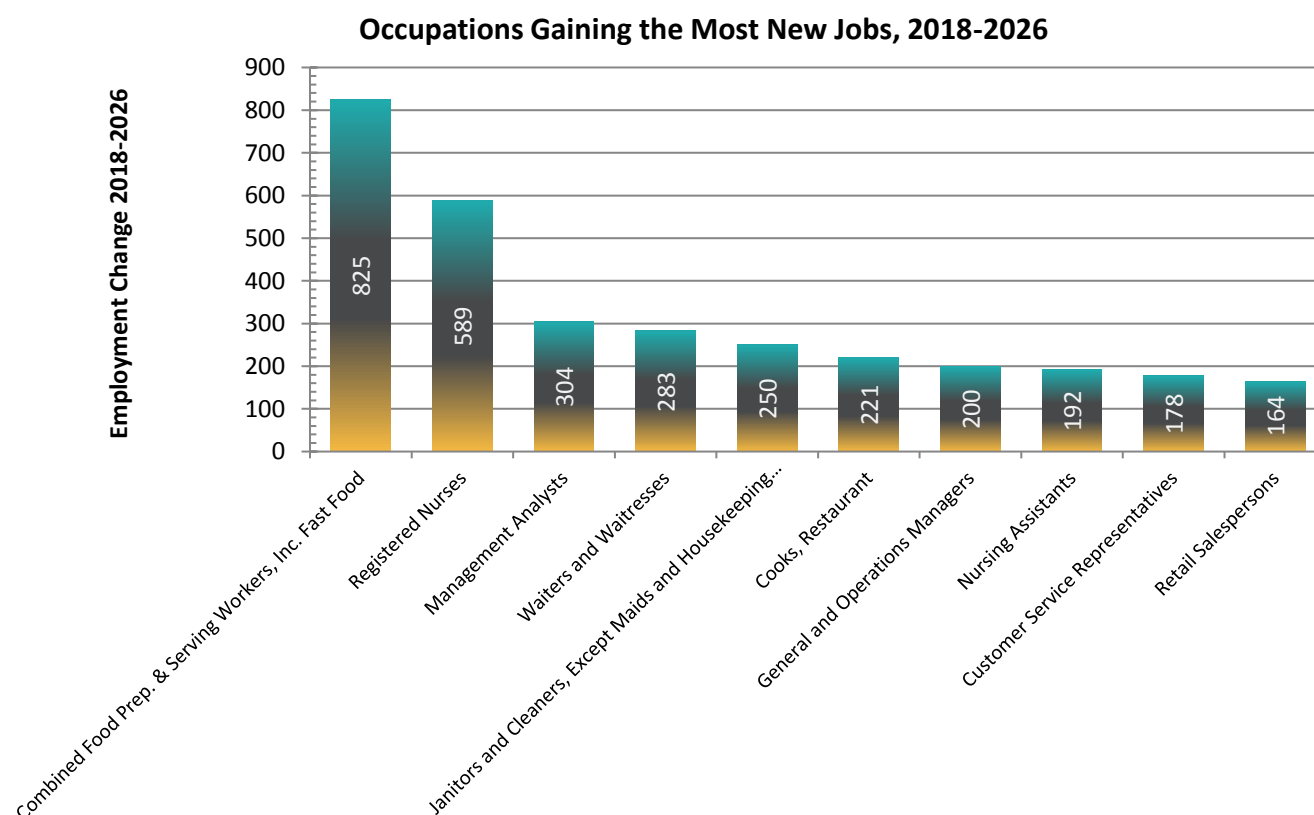
### Projected Employment by Occupation:

### Occupations Gaining the Most New Jobs (2018-2026)

Trend: By total employment change, Food Prep. and Serving Workers and Registered Nurses are the occupations projected to add the most jobs in Leon County by 2026.

Industry	2017 Emp.	2025 Emp.	Total Emp. Change	Percent Growth
Combined Food Prep. & Serving Workers, Inc. Fast Food	5,068	5,893	825	16.3%
Registered Nurses	3,213	3,802	589	18.3%
Management Analysts	5,794	6,098	304	5.3%
Waiters and Waitresses	3,402	3,685	283	8.3%
Janitors and Cleaners, Except Maids and Housekeeping	2,600	2,850	250	9.6%
Cooks, Restaurant	1,763	1,984	221	12.5%
General and Operations Managers	1,813	2,013	200	11.0%
Nursing Assistants	1,204	1,396	192	16.0%
Customer Service Representatives	3,111	3,289	178	5.7%
Retail Salespersons	4,890	5,054	164	3.4%

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





## Workforce and Income

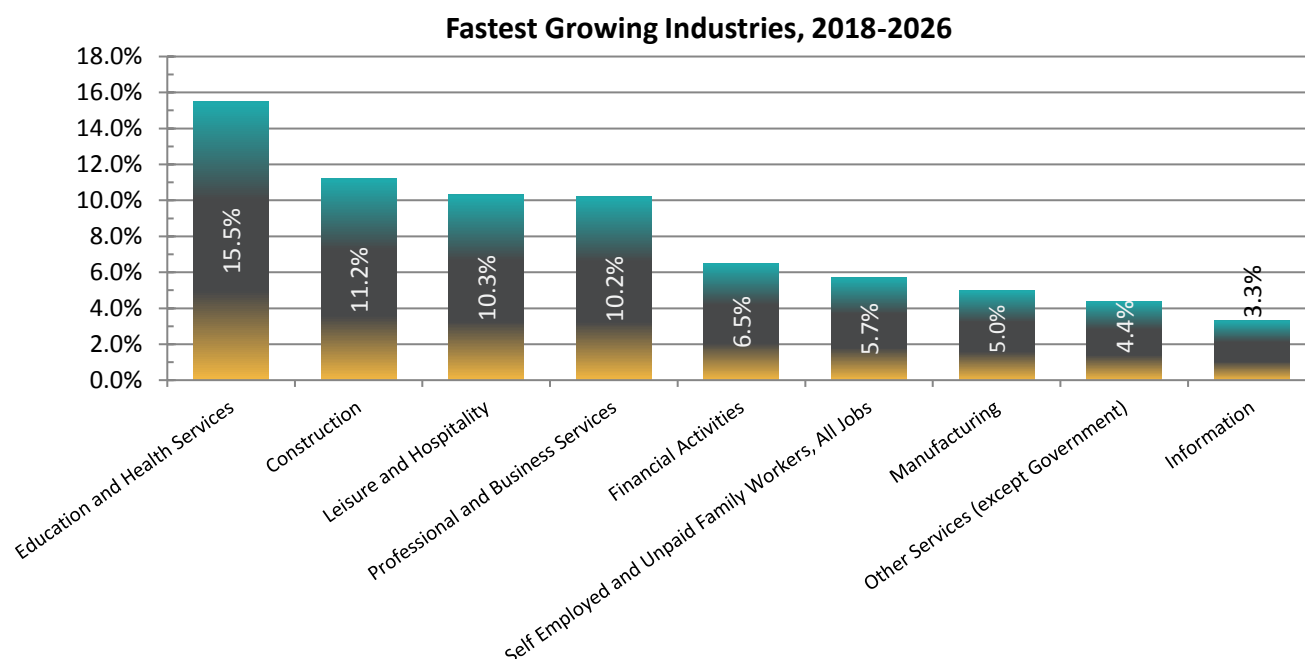
### Projected Employment by Industry:

### Fastest Growing Industries in Leon County

Trend: In Leon County, Education and Health Services, Construction, 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 2018 and 2026.

Industry	2018 Emp.	2026 Emp.	Total Emp. Change	Percent Growth
Education and Health Services	22,045	25,469	3,424	15.5%
Construction	6,128	6,811	683	11.2%
Leisure and Hospitality	18,927	20,880	1,953	10.3%
Professional and Business Services	19,554	21,542	1,988	10.2%
Financial Activities	7,415	7,897	482	6.5%
Self Employed and Unpaid Family Workers, All Jobs	11,221	11,858	637	5.7%
Manufacturing	1,757	1,844	87	5.0%
Other Services (except Government)	7,146	7,458	312	4.4%
Information	3,313	3,423	110	3.3%
Trade, Transportation, and Utilities	20,722	21,395	673	3.3%
Agriculture, Forestry, Fishing and Hunting	341	348	7	2.1%
Government	53,882	54,789	907	1.7%
Total All Industries	172,459	183,722	11,263	6.5%

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



## Workforce and Income

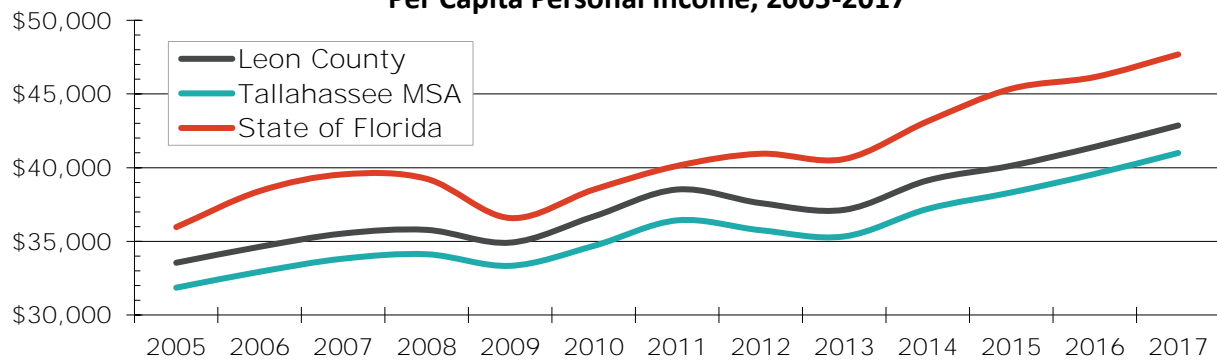
### Per Capita Personal Income

Trend: Per capita personal increased 3.5% in Leon County in 2017 and was 90% 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.

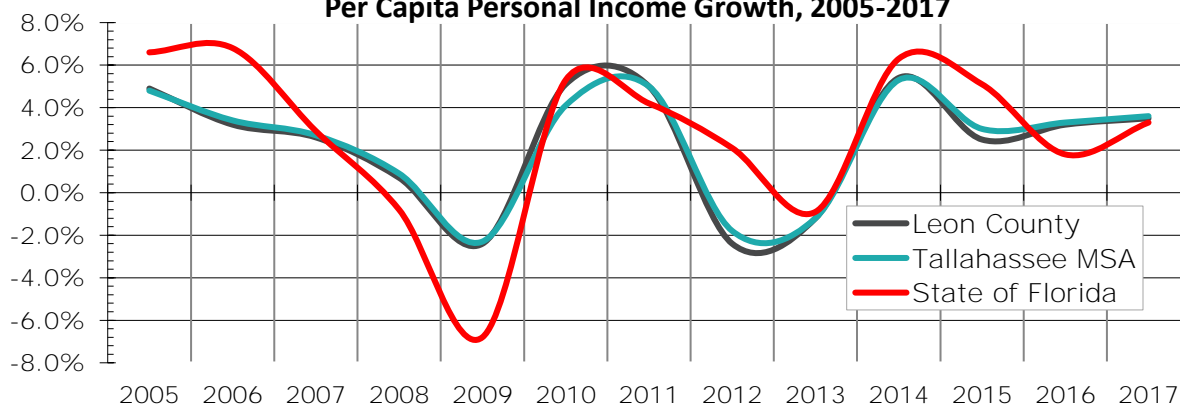
Year	Leon County	Percent Change from Prior Year	Tallahassee MSA	Percent Change from Prior Year	State of Florida	Percent Change from Prior Year
2005	\$33,544	4.9%	\$31,853	4.8%	\$35,962	6.6%
2006	\$34,629	3.2%	\$32,934	3.4%	\$38,414	6.8%
2007	\$35,529	2.6%	\$33,823	2.7%	\$39,545	2.9%
2008	\$35,777	0.7%	\$34,122	0.9%	\$39,240	-0.8%
2009	\$34,911	-2.4%	\$33,337	-2.3%	\$36,580	-6.8%
2010	\$36,689	5.1%	\$34,688	4.1%	\$38,511	5.3%
2011	\$38,517	5.0%	\$36,423	5.0%	\$40,120	4.2%
2012	\$37,591	-2.4%	\$35,752	-1.8%	\$40,944	2.1%
2013	\$37,136	-1.2%	\$35,330	-1.2%	\$40,582	-0.9%
2014	\$39,134	5.4%	\$37,201	5.3%	\$43,146	6.3%
2015	\$40,128	2.5%	\$38,314	3.0%	\$45,352	5.1%
2016	\$41,413	3.2%	\$39,572	3.3%	\$46,148	1.8%
2017	\$42,862	3.5%	\$40,994	3.6%	\$47,684	3.3%

Source: U.S. Department of Commerce, Bureau of Economic Analysis, CAINC1 and MAINC1 Personal Income Summary

**Per Capita Personal Income, 2005-2017**



**Per Capita Personal Income Growth, 2005-2017**





## Workforce and Income

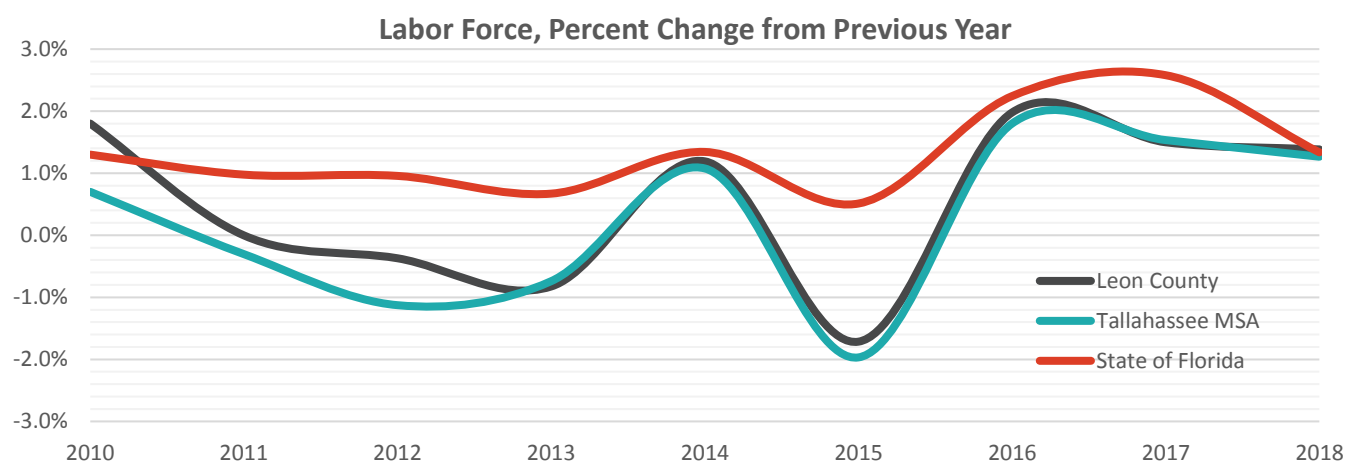
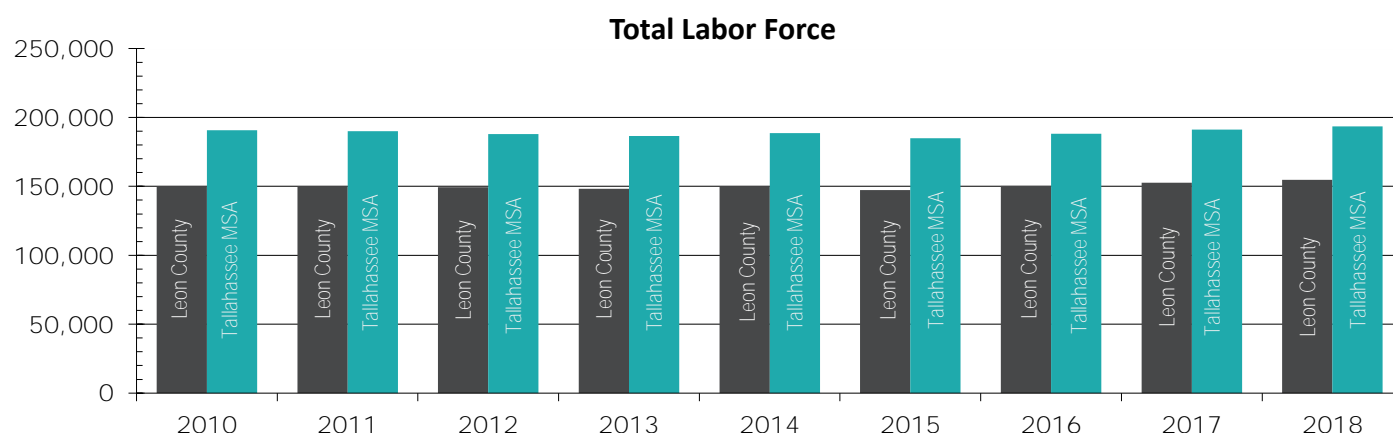
### Labor Force

Trend: The Tallahassee MSA's labor force on average grew 1.1% per year during in 2014 to 2018.

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%
2018	154,655	1.4%	193,504	1.3%	10,235,000	1.3%

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

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







## 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

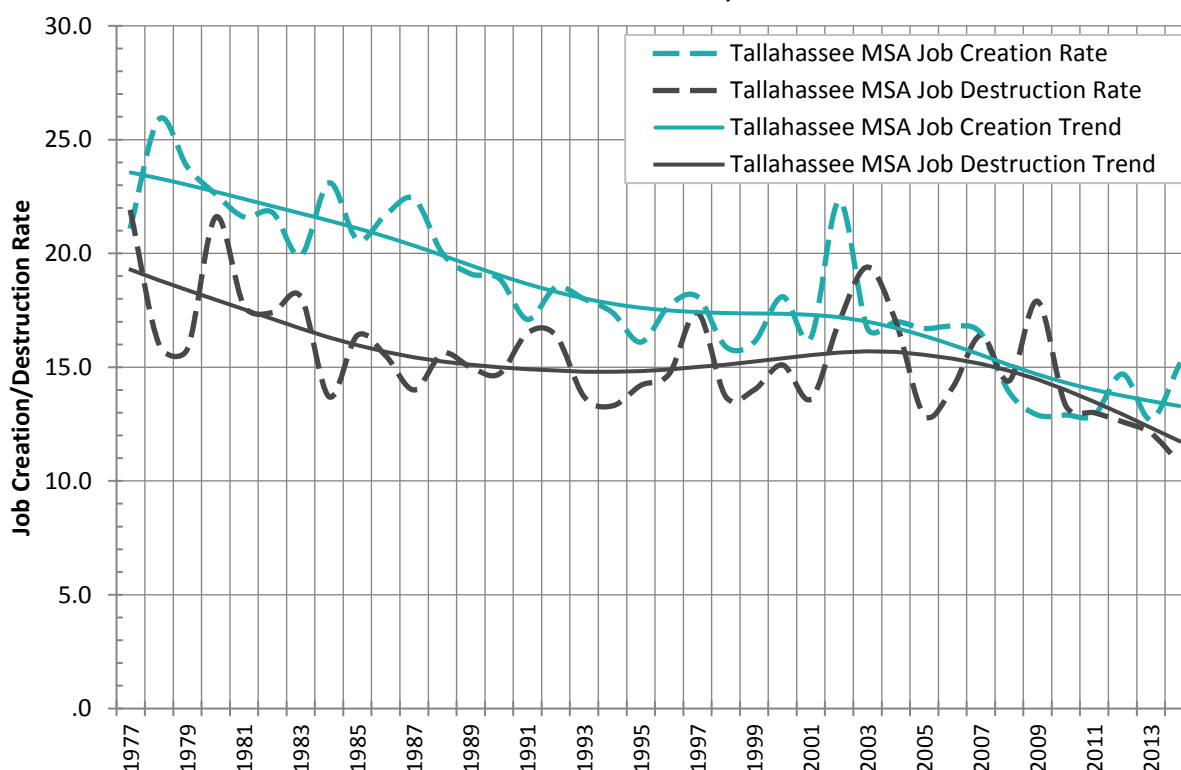
#### Tallahassee MSA, 1977-2014

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 2018 estimated average hourly wage for all occupations in the Tallahassee MSA was \$21.80, with an average wage of \$27.53 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2018	(2018 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Total All Occupations	172,810	\$21.80	\$17.07	\$10.34	\$27.53
Combined Food Prep. and Serving Workers, Incl. Fast Food	6,440	\$10.48	\$9.46	\$8.87	\$11.28
Retail Salespersons	5,560	\$12.46	\$10.66	\$8.93	\$14.22
Management Analysts	5,500	\$26.28	\$23.12	\$18.45	\$30.19
Cashiers	4,440	\$10.14	\$9.64	\$8.90	\$10.76
Office Clerks, General	3,840	\$13.98	\$12.73	\$9.92	\$16.02
Registered Nurses	3,240	\$30.05	\$29.34	\$23.54	\$33.31
Customer Service Representatives	3,150	\$15.19	\$14.19	\$10.42	\$17.58
Waiters and Waitresses	3,000	\$10.29	\$9.18	\$8.83	\$11.03
Secretaries and Admin. Assistants, Except Legal, Medical	2,890	\$17.22	\$16.76	\$11.43	\$20.11
Graduate Teaching Assistants	2,540	NR	NR	NR	NR
Janitors & Cleaners, Ex. Maids and Housekeeping Cleaners	2,430	\$12.24	\$11.21	\$10.10	\$13.31
Accountants and Auditors	2,330	\$26.19	\$22.14	\$16.14	\$31.22
Lawyers	2,190	\$56.74	\$38.16	\$28.57	\$70.82
Stock Clerks and Order Fillers	1,870	\$12.05	\$11.26	\$9.73	\$13.22
Compl. Officers, Ex. Ag., Const., Hlth., Safety, Transp.	1,780	\$20.76	\$16.30	\$13.44	\$24.42
First-Line Supervisors of Office and Admin. Support Workers	1,730	\$24.42	\$23.03	\$15.97	\$28.64
Business Operations Specialists, All Other	1,700	\$29.03	\$24.39	\$17.23	\$34.93
Receptionists and Information Clerks	1,640	\$12.51	\$11.96	\$10.00	\$13.76
Bookkeeping, Accounting, and Auditing Clerks	1,630	\$17.45	\$16.18	\$11.52	\$20.41
Correctional Officers and Jailers	1,580	\$18.55	\$17.45	\$15.65	\$20.01
Maintenance and Repair Workers, General	1,580	\$16.14	\$15.52	\$11.09	\$18.66
Cooks, Restaurant	1,520	\$12.44	\$12.05	\$10.16	\$13.59
Nursing Assistants	1,490	\$11.81	\$11.34	\$10.04	\$12.69
First-Line Supervisors of Retail Sales Workers	1,450	\$20.83	\$18.57	\$14.50	\$23.99
Food Preparation Workers	1,430	\$10.68	\$9.87	\$8.99	\$11.53
Teacher Assistants	1,430	\$25,783	\$25,421	\$21,578	\$27,886
Construction Laborers	1,400	\$12.68	\$12.48	\$9.81	\$14.12
Laborers and Freight, Stock, and Material Movers, Hand	1,400	\$12.77	\$12.03	\$9.92	\$14.20
Elementary School Teachers, Except Special Education	1,360	\$45,902	\$45,474	\$34,097	\$51,804
First-Line Supervisors of Food Prep. and Serving Workers	1,300	\$16.45	\$15.80	\$11.52	\$18.91
Landscaping and Groundskeeping Workers	1,300	\$13.33	\$11.88	\$10.63	\$14.69
Postsecondary Teachers, All Other	1,280	NR	NR	NR	NR



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

Trend: The 2018 estimated average hourly wage for all occupations in the Tallahassee MSA was \$21.80, with an average wage of \$27.53 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2018	(2018 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Light Truck or Delivery Services Drivers	1,210	\$16.32	\$15.01	\$10.73	\$19.12
Maids and Housekeeping Cleaners	1,210	\$9.76	\$9.36	\$8.94	\$10.17
Computer User Support Specialists	1,180	\$22.07	\$20.33	\$13.74	\$26.24
Heavy and Tractor-Trailer Truck Drivers	1,140	\$17.42	\$17.37	\$13.39	\$19.44
Computer Systems Analysts	1,070	\$30.42	\$26.87	\$21.42	\$34.92
Sales Representatives, Services, All Other	1,060	\$27.77	\$22.00	\$12.82	\$35.24
Licensed Practical and Licensed Vocational Nurses	1,050	\$20.34	\$18.84	\$16.07	\$22.47
Recreation Workers	1,030	\$12.98	\$10.41	\$8.99	\$14.97

\* 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.

Italics indicate annual wage.

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

**Employment:**

**Major Employers\* (2019)**

Size	Employer	Industry	Location
5,000+ employees	Florida State University	Education	Tallahassee
	State of Florida	Government	Tallahassee
2,000 to 4,999	City of Tallahassee	Government	Tallahassee
	Leon County Schools	Education	Tallahassee
	Tallahassee Memorial Healthcare, Inc.	Healthcare	Tallahassee
1,000 to 1,999	Capital Regional Medical Center	Healthcare	Tallahassee
	Florida A&M University	Education	Tallahassee
	Leon County	Government	Tallahassee
	Tallahassee Community College	Education	Tallahassee
300 to 999	Apalachee Center, Inc.	Healthcare	Tallahassee
	Capital Health Plan	Healthcare	Tallahassee
	Citizens Property Insurance Corporation	Business Services	Tallahassee
	Coastal Forest Resources	Manufacturing	Havana
	General Dynamics Land Systems	Manufacturing	Tallahassee
	Goodwill Industries - Big Bend	Social Services	Tallahassee
	Mainline Information Systems	Information Technology	Tallahassee
	Metz Culinary Management	Business Services	Tallahassee
	Sodexo	Business Services	Tallahassee
	St. Marks Powder	Manufacturing	Crawfordville
	The Florida Bar	Associations & Organizations	Tallahassee
	Westminster Oaks	Healthcare	Tallahassee
200 to 299	Big Bend Hospice	Healthcare	Tallahassee
	Comcast of Tallahassee	Telecommunications	Tallahassee
	Danfoss Turbocor	Manufacturing	Tallahassee
	FBMC Benefits Management	Business Services	Tallahassee
	HealthSouth Rehabilitation Hospital of Tallahassee	Healthcare	Tallahassee
	Radiology Associates	Healthcare	Tallahassee
	Tallahassee Primary Care Associates	Healthcare	Tallahassee
	Tri-Eagle Sales	Wholesale Distribution	Midway
	VA Outpatient Clinic	Healthcare	Tallahassee
100 to 199	Advanced Systems Design, Inc	Information Technology	Tallahassee
	Ajax Building Corporation	Construction	Midway
	Arnold & Porter Kaye Scholer LLP	Business Services	Tallahassee
	Barkley Security	Business Services	Quincy
	BASF Corporation	Manufacturing	Quincy
	Brandt Information Services, Inc.	Information Technology	Tallahassee
	Capital City Bank Group	Finance & Insurance	Tallahassee
	Capital Healthcare Center	Healthcare	Tallahassee
	CenturyLink	Telecommunications	Tallahassee
	Chromalloy Component Services	Manufacturing	Tallahassee
	Cone Distributing	Wholesale Distribution	Tallahassee

**Employment:**

**Major Employers\* (2019)**

Size	Employer	Industry	Location
100 to 199 (cont.)	Consulate Health Care	Healthcare	Tallahassee
	CSG Systems	Information Technology	Crawfordville
	Culpepper Construction	Construction	Tallahassee
	Datamaxx Group	Information Technology	Tallahassee
	Eden Springs Nursing and Rehabilitation Center	Healthcare	Crawfordville
	Figg Engineering Group	Business Services	Tallahassee
	First Commerce Credit Union	Finance & Insurance	Tallahassee
	Florida Coca-Cola Bottling Company	Manufacturing	Tallahassee
	Florida Prime Mushrooms	Agriculture	Quincy
	Gadsden Tomato Company	Agriculture	Quincy
	GT Technologies	Manufacturing	Tallahassee
	Guardsmark LLC	Business Services	Tallahassee
	Home Instead Senior Care	Healthcare	Tallahassee
	Image API	Information Technology	Tallahassee
	MarathonFoto	Business Services	Tallahassee
	Miracle Hill Nursing and Rehabilitation Center	Healthcare	Tallahassee
	Municipal Code Corporation	Business Services	Tallahassee
	Peavy & Son Construction	Construction	Havana
	Residential Elevators	Manufacturing	Crawfordville
	Sandico	Construction	Tallahassee
	Seven Hills Health & Rehabilitation Center	Healthcare	Tallahassee
	Syn-Tech Systems	Manufacturing	Tallahassee
	Tallahassee Orthopedic Clinic	Healthcare	Tallahassee
	TeligentEMS	Manufacturing	Havana
	T-Formation	Manufacturing	Midway
	Trulieve	Manufacturing	Midway
	University Center Club	Leisure & Hospitality	Tallahassee
	URS Group	Business Services	Tallahassee

\*Excludes retail operations.

Note: Employers listed alphabetically by size category.

Source: D&B/Hoovers and firms' websites.



## Economic Factors

### Non-profit Organizations:

#### Annual Income over \$10 Million (2015)

Trend: Tallahassee has nearly 50 non-profit organizations whose gross receipts each annually exceed \$10 million, together employing almost 11,000.

Name	Year Tax Exempt Status Granted	Internal Revenue Code Tax Exempt Status	Employees	Volunteers	Voting Board Members	Gross Receipts (\$ millions)
Capital Health Plan Inc	1982	501(c)(4)	492	-	12	\$995.0
Tallahassee Memorial Healthcare Inc	1979	501(c)(3)	5,239	690	16	\$786.5
Florida Insurance Guaranty Assn Inc	1973	501(c)(6)	31	9	9	\$440.3
Florida Healthy Kids Corp	1992	501(c)(3)	39	23	12	\$313.2
Florida State University Fdn Inc	1963	501(c)(3)	138	567	51	\$246.4
Florida Workers Compensation Insurance	1998	501(c)(3)	16	11	11	\$142.3
Florida Tourism Industry Marketing Corps Inc	1996	501(c)(6)	134	32	30	\$109.5
Big Bend Community Based Care Inc	2002	501(c)(3)	83	0	15	\$85.9
Envision Credit Union	1970	501(c)(14)	171	8	5	\$57.7
Seminole Boosters Inc	1975	501(c)(3)	63	55	60	\$57.4
Florida Coalition Against Domestic Violence	1986	501(c)(3)	71	0	10	\$40.1
School Board of Leon County Florida Voluntary Employee Benefits Trust	1982	501(c)(9)	0	6	6	\$39.3
Community Fdn of North Florida Inc	1997	501(c)(3)	5	13	13	\$37.7
Florida Network of Youth and Family Services Inc	1994	501(c)(3)	12	15	16	\$37.4
Florida Education Assn	1976	501(c)(5)	78	150	15	\$30.7
First Commerce Credit Union	1972	501(c)(14)	165	11	7	\$30.4
The Ounce of Prevention Fund of Florida Inc	1989	501(c)(3)	43	11	11	\$30.4
Florida Assn of Rehabilitation Facilities Inc	2007	501(c)(3)	24	19	18	\$30.2
Tall Timbers Fdn Inc	2001	501(c)(3)	0	0	7	\$28.1
Apalachee Center Inc	1967	501(c)(3)	572	-	15	\$26.6
Institute for Intergovernmental Research Inc	1996	501(c)(3)	150	1	7	\$26.5
Goodwill Industries Big Bend Inc	1970	501(c)(3)	970	0	22	\$25.8
Florida Agricultural & Mechanical Univ Fdn Inc	1967	501(c)(3)	0	25	30	\$24.7
Tallahassee Memorial Healthcare Fdn Inc	1977	501(c)(3)	0	568	41	\$24.2
Early Learning Coalition of the Big Bend	2003	501(c)(3)	49	22	25	\$24.1
Barbara Bush Fdn for Family Literacy Inc	2007	501(c)(3)	30	3,655	12	\$23.3
Florida Assn of Court Clerks	1978	501(c)(6)	113	19	19	\$22.3
CareerSource Florida Inc	2001	501(c)(3)	31	-	31	\$20.9
Florida State University Research Fdn Inc	1995	501(c)(3)	0	0	9	\$20.5
Twin Oaks Juvenile Development Inc	1999	501(c)(3)	520	165	5	\$20.4
Big Bend Hospice Inc	1983	501(c)(3)	258	456	23	\$18.9
Florida Surplus Lines Service Office	1998	501(c)(6)	28	9	9	\$18.9
Fish & Wildlife Fdn of Florida Inc	1995	501(c)(3)	3	0	18	\$15.7
Alfred B. Maclay Jr. Day School	1967	501(c)(3)	286	100	15	\$13.5



## Economic Factors

### Non-profit Organizations:

#### Annual Income over \$10 Million (2015)

Trend: Tallahassee has nearly 50 non-profit organizations whose gross receipts each annually exceed \$10 million, together employing almost 11,000.

Name	Year Tax Exempt Status Granted	Internal Revenue Code Tax Exempt Status	Employees	Volunteers	Voting Board Members	Gross Receipts (\$ millions)
Florida State University International Programs	1994	501(c)(3)	0	–	14	\$12.9
Florida Institute of Certified Public	1943	501(c)(6)	61	626	28	\$12.8
North Florida Medical Centers Inc	1979	501(c)(3)	171	–	10	\$12.5
Ventura in Manhattan Inc	2000	501(c)(3)	–	–	–	\$12.5
Florida State University Credit Union	1970	501(c)(14)	96	12	9	\$12.3
Florida Police Benevolent Assn Inc	1975	501(c)(5)	115	70	177	\$12.1
America's Second Harvest of the Big Bend Inc	1989	501(c)(3)	35	1,800	13	\$11.7
Foundation for Excellence in Education Inc	2007	501(c)(3)	71	14	9	\$11.5
Florida Restaurant and Lodging Assn Inc	1991	501(c)(6)	73	65	65	\$11.3
Florida Assn of Insurance Agents	1942	501(c)(6)	30	190	14	\$11.2
Miracle Hill Nursing & Rehabilitation Center Inc	1972	501(c)(3)	300	50	9	\$10.3
DISC Village Inc	1975	501(c)(3)	213	77	5	\$10.3
Chancellory Business Park LLC	2000	501(c)(25)	–	–	–	\$10.1

Note: Gross Receipts is taken from the IRS Business Master File. Income, as reported in the Business Master File, is a gross figure that does not subtract rental expenses, costs, sales expenses, direct expenses, and costs of goods sold. Italics indicate tax year other than 2015 (2016 or 2014).

Source: IRS Business Master File; Form 990 records obtained from GuideStar



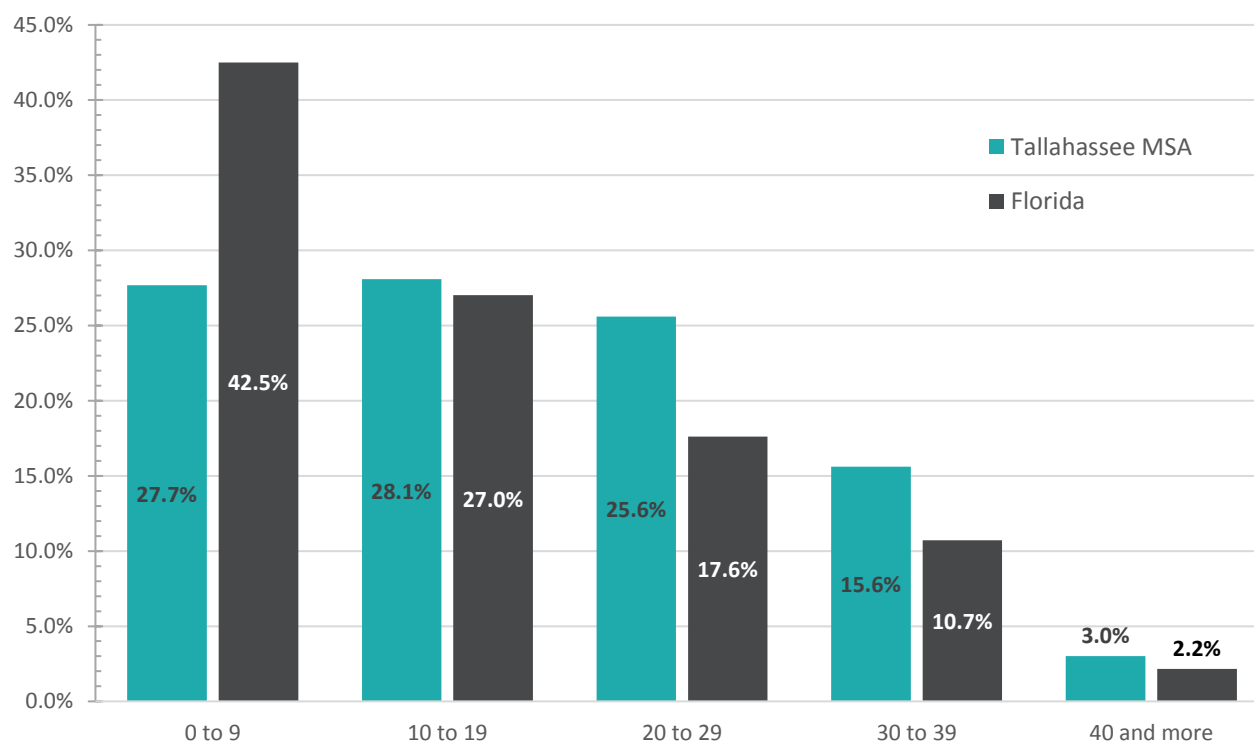
Trend: Professional Engineers (PEs) have an essential role in a community's economic development and redevelopment. Their education, experience, and professional obligations for protecting public health and safety place them in the vanguard of innovation for public infrastructure and private-sector development. Of the nearly 800 active PEs in the Tallahassee MSA, 44% have 20 years of experience or more, compared to only 30% among all Florida PEs.

Years Experience	Tallahassee MSA		Florida	
	Number	Percent	Number	Percent
0 to 9	211	27.7%	14,398	42.5%
10 to 19	214	28.1%	9,156	27.0%
20 to 29	195	25.6%	5,964	17.6%
30 to 39	119	15.6%	3,627	10.7%
40 and more	23	3.0%	733	2.2%
Total	762	100.0%	33,878	100.0%

Note: Percentages may not sum to 100.0% due to rounding. Professional Engineers current and active as of August 2019.

Source: Florida Department of Business and Professional Regulation

**Professional Engineers in Tallahassee MSA and Florida, Years Licensed**



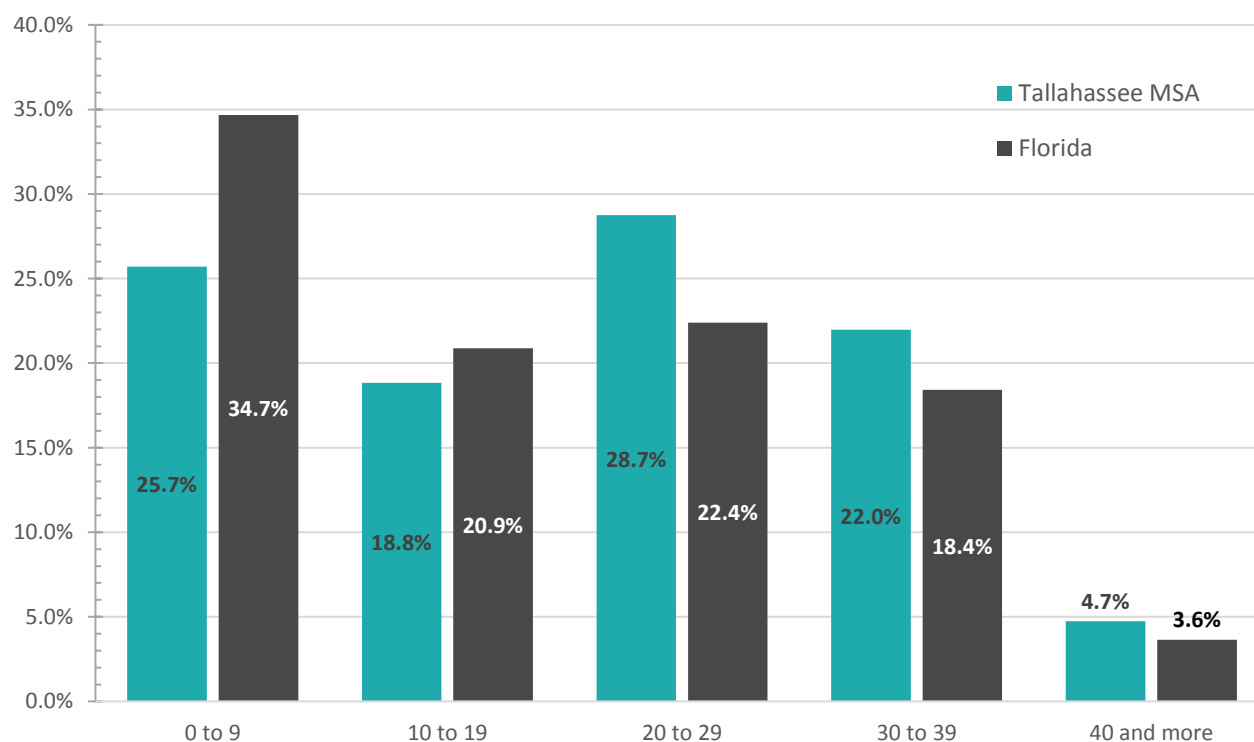
Trend: Certified Public Accountants (CPAs) analyze and plan how money is used by businesses, nonprofit organizations, governments, and individuals. CPAs perform vital functions in economic development by preparing financial statements, evaluating investments, performing cost analyses, and detecting fraud. Of the nearly 900 active CPAs in the Tallahassee MSA, 55% have 20 years of experience or more, compared to about 44% statewide.

Years Experience	Tallahassee MSA		Florida	
	Number	Percent	Number	Percent
0 to 9	228	25.7%	11,436	34.7%
10 to 19	167	18.8%	6,887	20.9%
20 to 29	255	28.7%	7,387	22.4%
30 to 39	195	22.0%	6,078	18.4%
40 and more	42	4.7%	1,202	3.6%
Total	887	100.0%	32,990	100.0%

Note: Percentages may not sum to 100.0% due to rounding. Certified Public Accountants current and active as of August 2019.

Source: Florida Department of Business and Professional Regulation

### Certified Public Accountants in Tallahassee MSA and Florida, Years Licensed



**Real Gross Domestic Product by Metro Area**

**(\$ billions and percent change from previous year)**

Trend: In 2017, the Tallahassee Metropolitan Area's (MSA) Real Gross Domestic Product (GDP) was \$13.8 billion, up 3.1% from 2016, exceeding Florida's Real GDP growth rate of 2.2% (and 2.1% for the US), placing the Tallahassee MSA among the top 20% of metro areas nationwide (66th) and 6th among Florida's 22 metro areas.

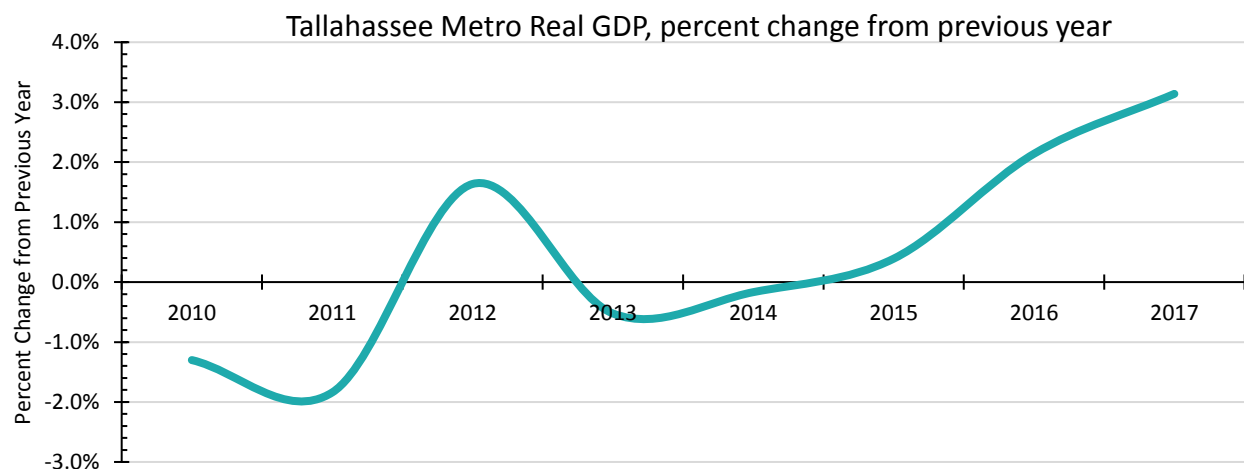
Real GDP (\$ billions, in chained 2009 dollars)

Metro Area	2010	2011	2012	2013	2014	2015	2016	2017
Madison, WI	35.9	36.7	37.1	38.0	38.1	41.1	42.8	43.6
Greenville, SC	30.9	32.1	32.0	32.6	33.6	35.0	35.6	36.5
Little Rock, AR	33.3	33.3	33.7	32.8	33.2	33.8	33.9	34.2
Trenton, NJ	24.9	25.3	28.6	26.8	26.4	26.2	26.5	25.8
Lansing, MI	19.1	18.7	18.2	18.2	18.5	18.8	19.4	19.5
Lincoln, NE	14.7	15.0	15.7	16.0	16.5	16.9	17.1	17.3
Pensacola, FL	14.1	14.3	14.4	14.8	14.7	15.1	15.2	15.5
Montgomery, AL	15.1	15.0	14.9	15.0	14.8	15.0	15.3	15.2
Tallahassee, FL	13.2	13.0	13.2	13.1	13.1	13.1	13.4	13.8
Gainesville, FL	10.5	10.3	10.4	11.0	10.6	10.7	10.9	11.1
Athens, GA	6.8	6.7	6.8	6.8	6.9	7.4	8.1	8.5

Percent Change from Previous Year

Metro Area	2010	2011	2012	2013	2014	2015	2016	2017
Madison, WI	1.6%	2.2%	1.1%	2.3%	0.4%	7.9%	4.2%	1.8%
Greenville, SC	4.1%	4.0%	-0.3%	1.9%	3.2%	4.0%	1.8%	2.6%
Little Rock, AR	0.3%	0.0%	1.2%	-2.8%	1.2%	1.9%	0.3%	1.0%
Trenton, NJ	3.7%	1.8%	12.9%	-6.3%	-1.3%	-0.7%	1.0%	-2.7%
Lansing, MI	7.2%	-2.1%	-3.0%	0.0%	1.4%	1.9%	3.4%	0.6%
Lincoln, NE	4.0%	2.4%	4.5%	2.2%	2.8%	2.3%	1.2%	1.4%
Pensacola, FL	1.9%	0.9%	1.1%	2.7%	-1.1%	3.0%	0.9%	1.7%
Montgomery, AL	0.8%	-0.1%	-0.8%	0.4%	-1.0%	1.0%	2.0%	-0.7%
Tallahassee, FL	-1.3%	-1.8%	1.6%	-0.5%	-0.2%	0.4%	2.1%	3.1%
Gainesville, FL	0.6%	-2.3%	1.4%	5.3%	-3.3%	0.6%	1.6%	2.4%
Athens, GA	-0.6%	-0.8%	1.1%	-0.3%	2.2%	7.4%	8.7%	4.9%

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





## Economic Factors

### Productivity

#### GDP per Private Sector Employee, Tallahassee MSA

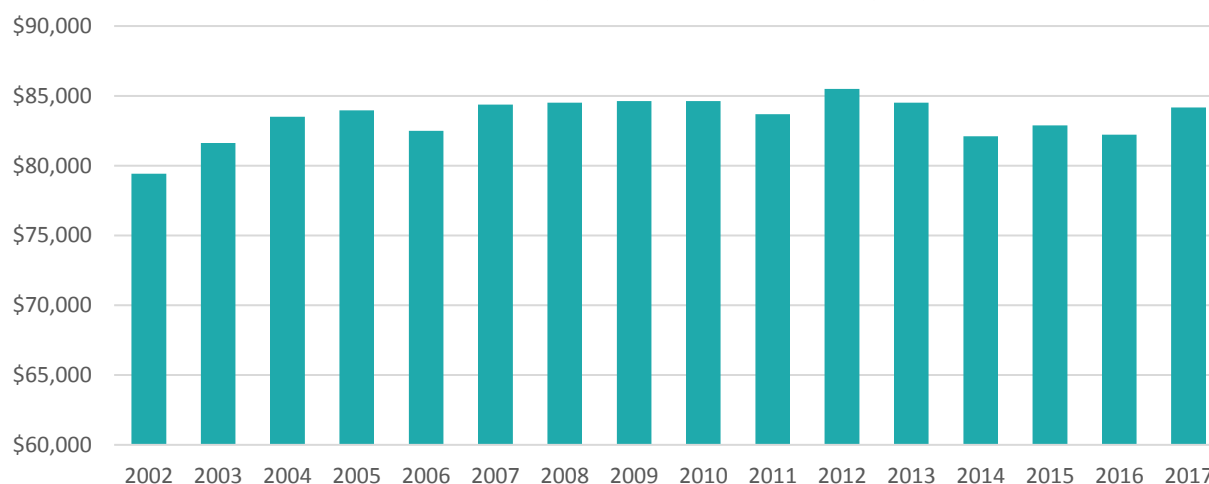
Trend: The broadest proxy for Productivity in metropolitan areas is to measure the Gross Domestic Product (GDP) of private industries per private sector employee. GDP per employee is calculated by dividing GDP by total employment, in inflation-adjusted (chained 2009) dollars. Annual changes in productivity for the Tallahassee metro area have fluctuated between a low of -2.9% 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	\$8,673	102,634	\$84,504	-1.2%
2014	\$8,695	105,913	\$82,096	-2.9%
2015	\$8,927	107,709	\$82,881	1.0%
2016	\$9,200	111,897	\$82,218	-0.8%
2017	\$9,584	113,865	\$84,170	2.3%

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)





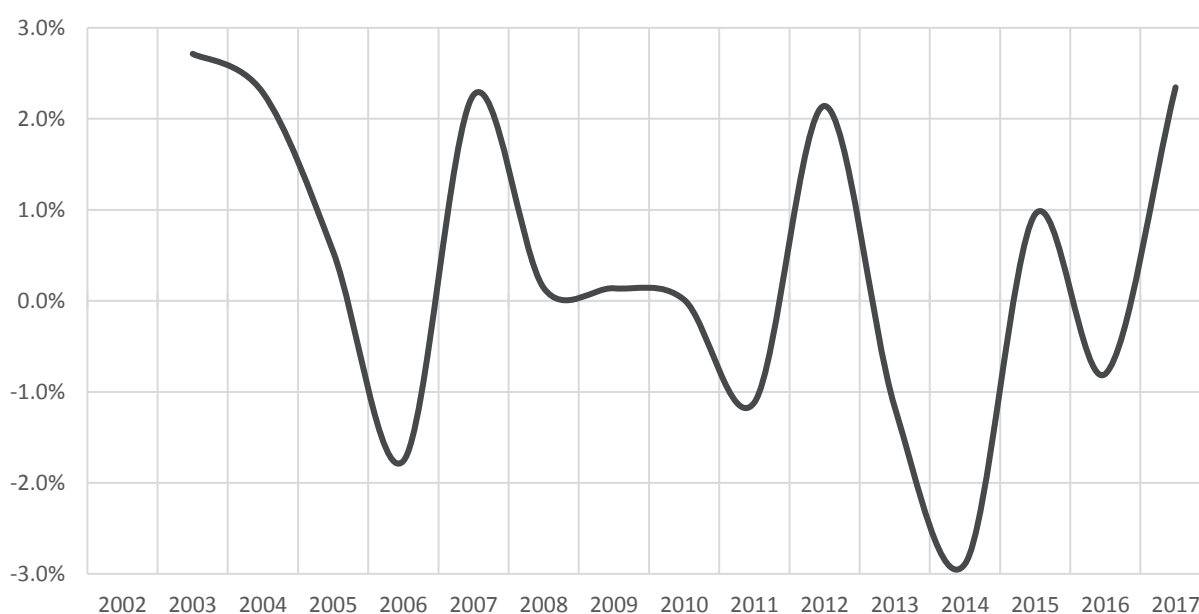
## Economic Factors

### Productivity

#### GDP per Private Sector Employee, Tallahassee MSA

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 -2.9% between 2013 and 2014 to a high of 2.7% from 2002 to 2003.

Productivity Change from Prior Year





## Economic Factors

### Exports from Tallahassee MSA

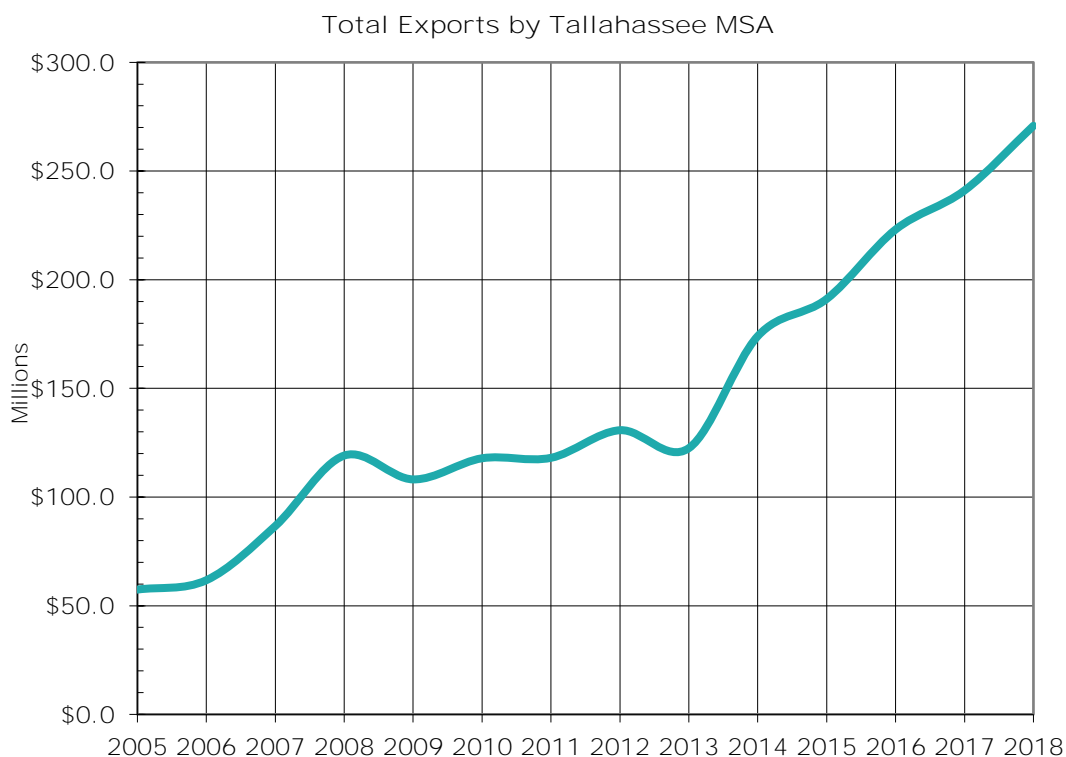
#### Total Merchandise Exports

Trend: Between 2005 and 2017, total merchandise exports from Tallahassee MSA more than quadrupled, with an average annual growth rate around 14%. Tallahassee accounts for approximately 0.5% 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%
2017	\$241,077,190	8.1%
2018	\$270,831,143	12.3%

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

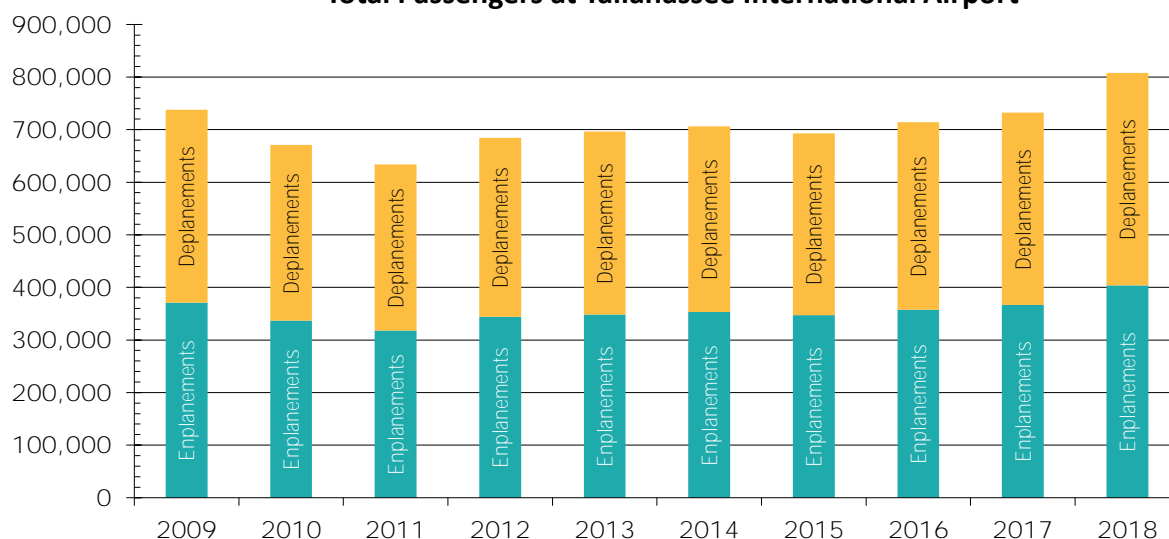
#### Total Passengers at TLH

Trend: Passenger traffic at Tallahassee International Airport increased 12.3% in 2018 from 2017 and was 17.4% higher than the 2011-2016 annual average of 688,082.

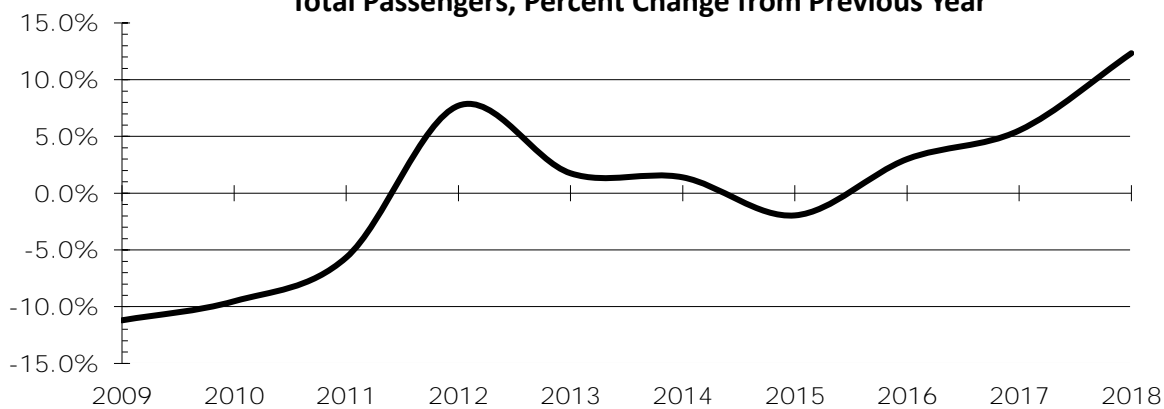
Year	Enplanements	Deplanements	Total Passengers	Percent Change from Previous Year
2009	371,106	366,579	737,685	-11.2%
2010	336,598	334,099	670,697	-9.5%
2011	318,172	315,619	633,791	-5.7%
2012	344,078	340,533	684,611	7.7%
2013	348,185	348,539	696,724	1.8%
2014	353,253	353,275	706,528	1.4%
2015	346,992	345,857	692,849	-2.0%
2016	357,579	356,407	713,986	3.0%
2017	366,408	365,827	732,235	5.5%
2018	403,929	403,777	807,706	12.3%

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

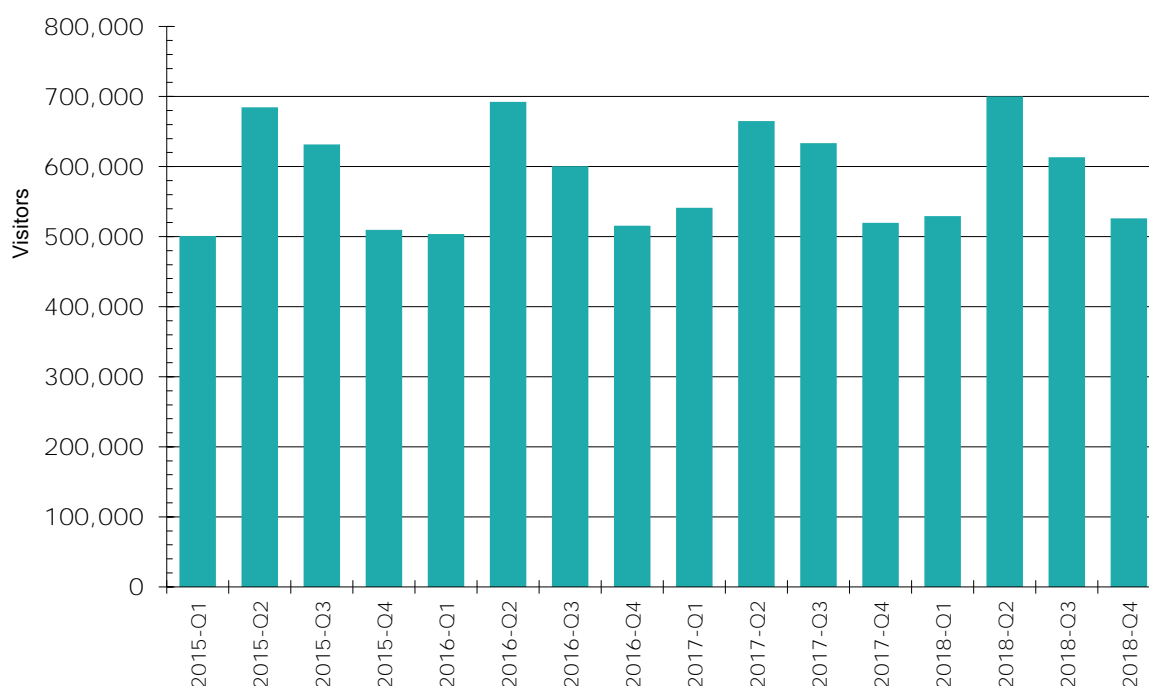
Trend: In FY 2018, 2,368,988 visitors visited Leon County, up 0.4% from FY 2017. Direct expenditures of visitors amounted to \$576.2 million in FY 2018, an increase of 1.6% from FY 2017.

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
2018-Q1	529,474	\$140.2	\$221.4
2018-Q2	700,206	\$168.6	\$266.4
2018-Q3	613,312	\$136.3	\$215.3
2018-Q4	525,996	\$131.1	\$207.1

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

Source: Visit Tallahassee and Downs & St. Germain Research

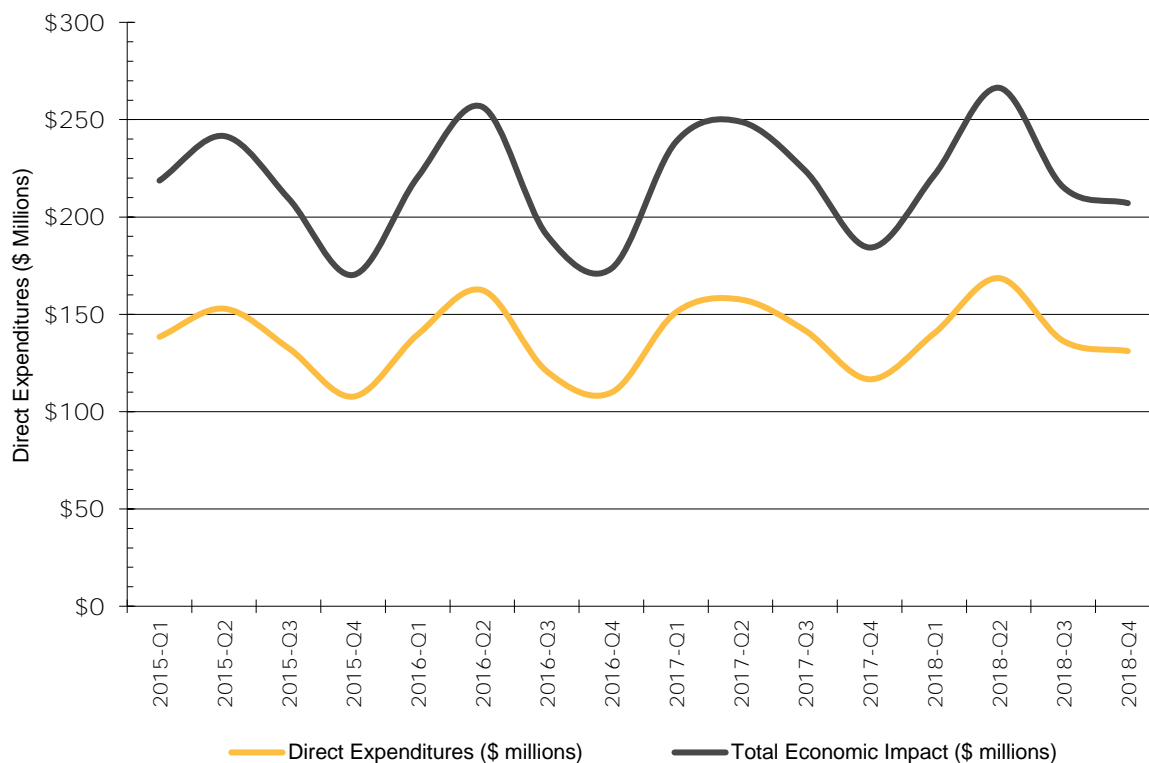
#### Quarterly Visitors





Trend: In FY 2018, 2,368,988 visitors visited Leon County, up 0.4% from FY 2017. Direct expenditures of visitors amounted to \$576.2 million in FY 2018, an increase of 1.6% from FY 2017.

**Quarterly Visitor Direct Expenditures and Total Economic Impact**





## Economic Factors

### Taxable Sales:

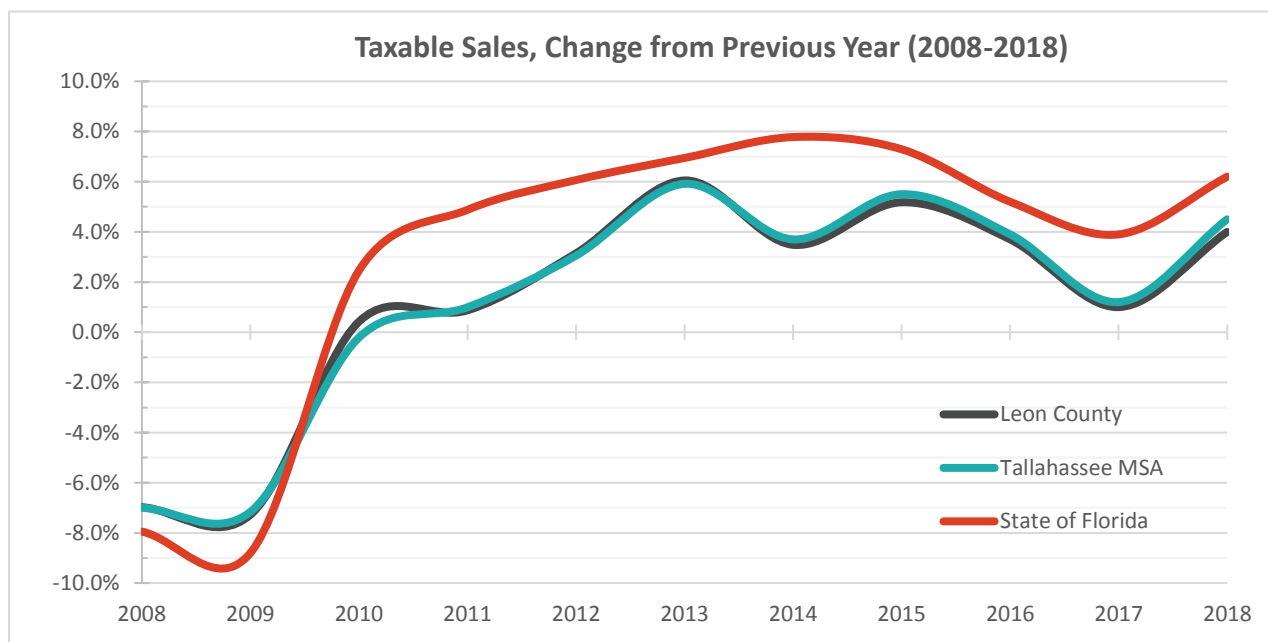
#### Annual Taxable Sales, Change from Previous Year

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 4.5% in the Tallahassee MSA in 2018. Taxable sales for the State of Florida were up 6.2% in 2018 compared with 2017.

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%
2018	\$4,380.5	4.0%	\$5,019.7	4.5%	\$452,421.8	6.2%

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

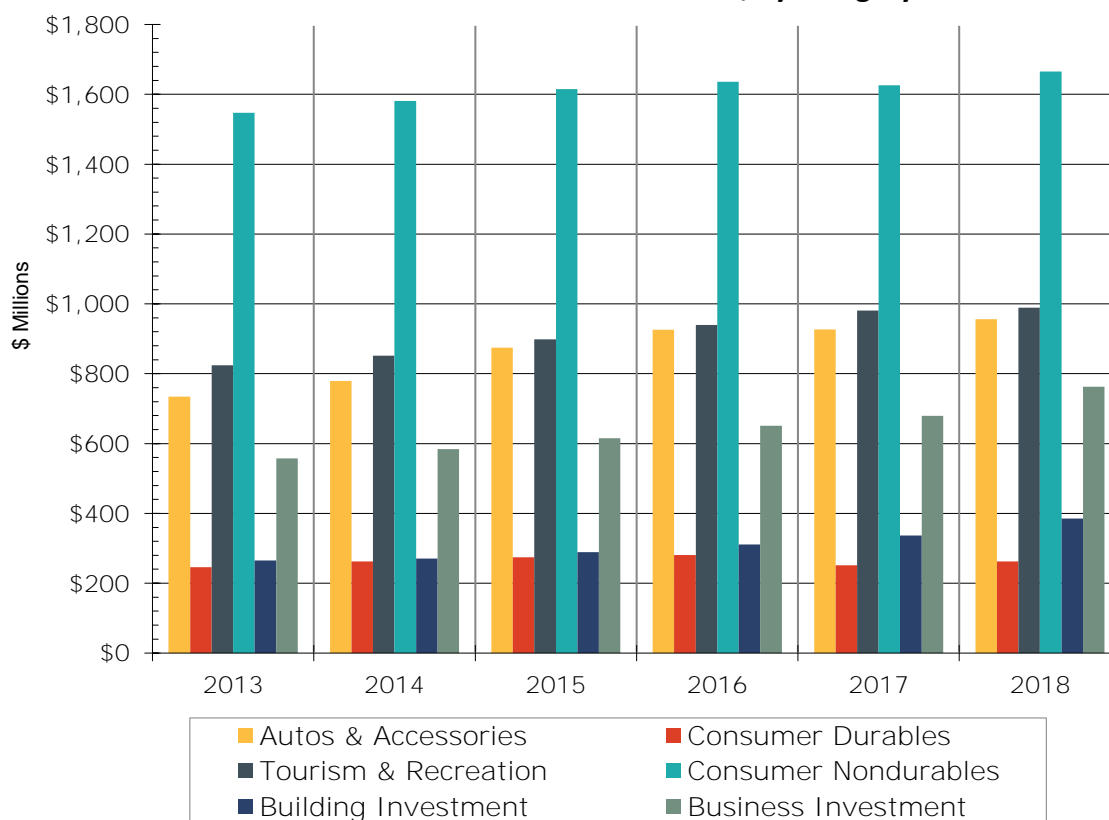
Trend: For the Tallahassee MSA, four of the six categories exhibited an increase in taxable sales each year between 2013 and 2018. Building Investment were up on average 7.8% each year; Autos & Accessories, 5.5%; Business Investment, 6.5%; Tourism & Recreation, 3.7%; Consumer Nondurables, 1.5%; Consumer Durables, 1.5%. It is estimated that taxable sales comprise 40-45% of all retail sales.

Category	2013	2014	2015	2016	2017	2018
Autos & Accessories	\$734.7	\$778.9	\$874.3	\$925.5	\$926.6	\$955.9
Consumer Durables	\$246.1	\$262.1	\$274.3	\$280.5	\$251.5	\$262.0
Tourism & Recreation	\$824.1	\$852.0	\$898.7	\$939.7	\$981.2	\$989.2
Consumer Nondurables	\$1,546.9	\$1,581.0	\$1,615.1	\$1,636.1	\$1,626.3	\$1,665.3
Building Investment	\$265.1	\$271.0	\$288.7	\$310.9	\$337.0	\$385.0
Business Investment	\$557.6	\$584.2	\$615.1	\$651.3	\$679.7	\$762.3

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)

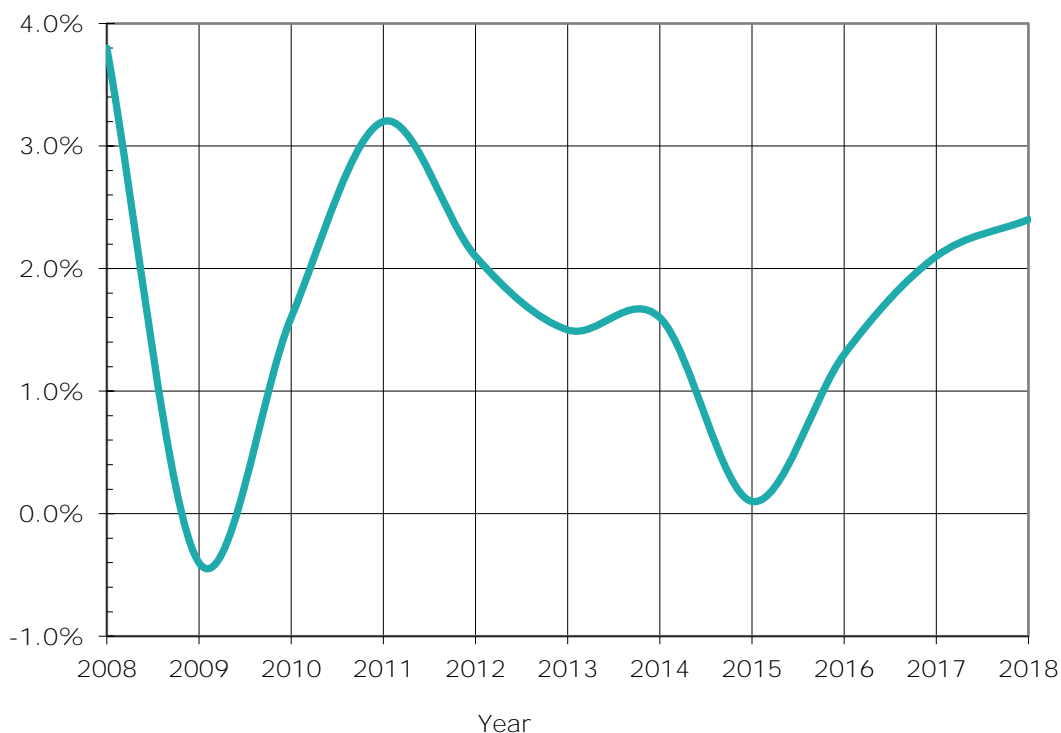
#### Annual Change in Consumer Price Index

Trend: The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 2.4% in 2018 following a 2.1% increase in 2017.

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%
2018	251.1	2.4%

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

Consumer Price Index - All Urban Consumers (CPI-U)  
2008-2018





## Economic Factors

### Bank Deposits:

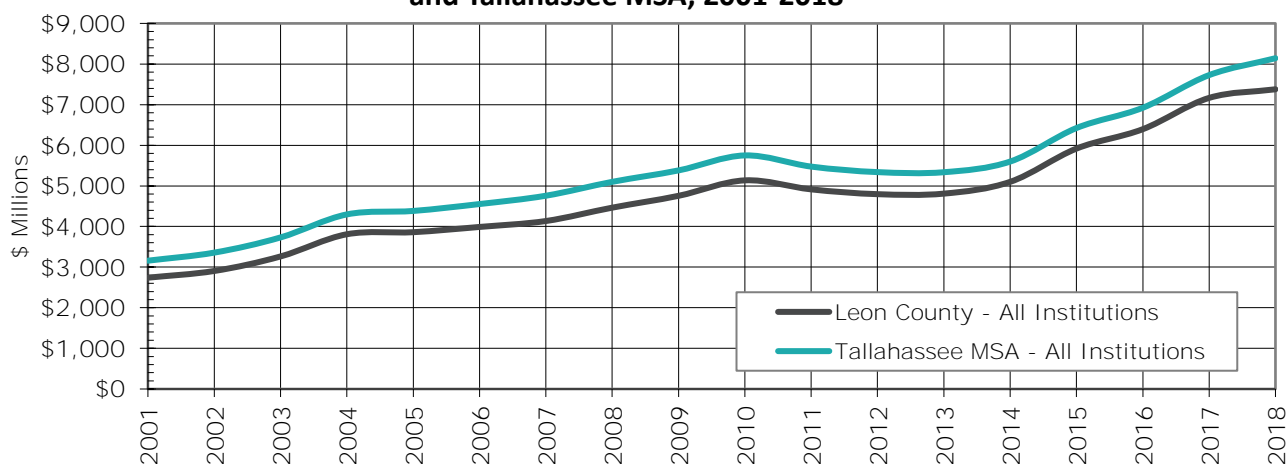
### FDIC Summary of Deposits

Trend: Over \$7.3 billion in deposits were held in Leon County in FDIC-insured institutions as of June 30, 2018. Total Leon County deposits increased 3% between 2017 and 2018. 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 2001-2018, 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	267	5,450	\$462,364
2015	18	78	\$5,918	18	87	\$6,424	254	5,387	\$502,909
2016	16	76	\$6,396	16	85	\$6,923	241	5,287	\$541,660
2017	16	75	\$7,166	16	84	\$7,727	228	5,136	\$563,792
2018	18	76	\$7,378	18	85	\$8,143	212	4,983	\$586,391

Source: FDIC, Summary of Deposits

**FDIC Summary of Deposits, Leon County  
and Tallahassee MSA, 2001-2018**



## **Economic Factors**

### **C2ER Annual Cost of Living Index**

Trend: In 2018, 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.

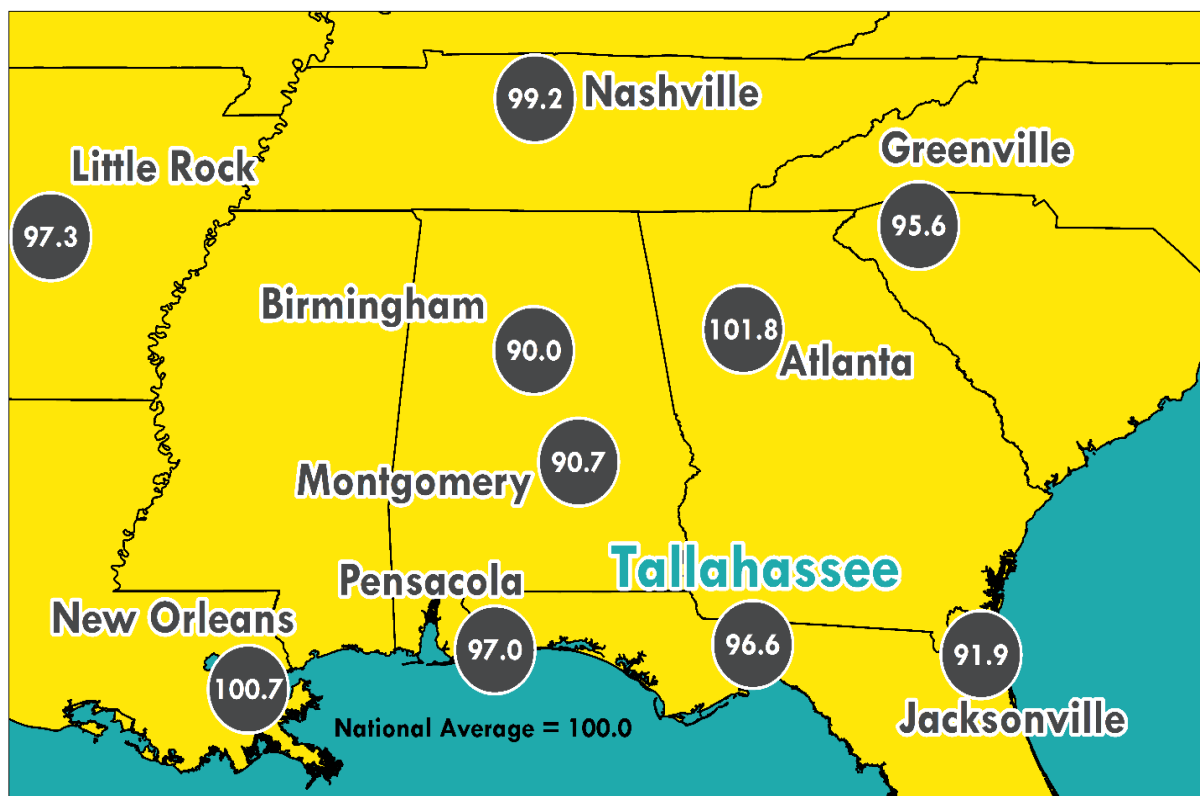
The Annual Cost of Living Index (COLI) is released by the Council for Community and Economic Research (C2ER) to measure regional differences in the cost of consumer goods and services (like grocery items, healthcare, and housing), excluding taxes and non-consumer expenditures, for professional and managerial 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 270 other participating urban areas across the United States.

Urban Area	All Items	Groceries	Housing	Utilities	Transportation	Healthcare	Misc. Goods & Services
Birmingham, AL	90.0	91.8	83.3	106.6	92.2	81.9	91.2
Montgomery, AL	90.7	99.3	81.3	103.8	94.2	84.2	91.9
Jacksonville, FL	91.9	98.2	86.1	97.4	87.7	83.0	95.1
Greenville, SC	95.6	101.4	77.5	93.2	99.8	109.2	106.4
<i>Tallahassee, FL</i>	<i>96.6</i>	<i>110.3</i>	<i>91.4</i>	<i>86.9</i>	<i>96.2</i>	<i>99.1</i>	<i>98.0</i>
Pensacola, FL	97.0	105.8	80.3	116.4	93.6	85.7	105.0
Little Rock, AR	97.3	94.9	88.6	95.5	99.1	87.4	106.8
Nashville, TN	99.2	95.3	93.1	96.6	95.0	84.0	109.4
New Orleans, LA	100.7	104.3	116.6	81.5	109.7	103.4	88.1
Atlanta, GA	101.8	99.6	106.2	87.0	100.1	109.1	102.4

Note: Gainesville, FL did not participate in 2018 COLI.

Source: Council for Community and Economic Research (C2ER)

2018 Cost of Living Index





## Economic Factors

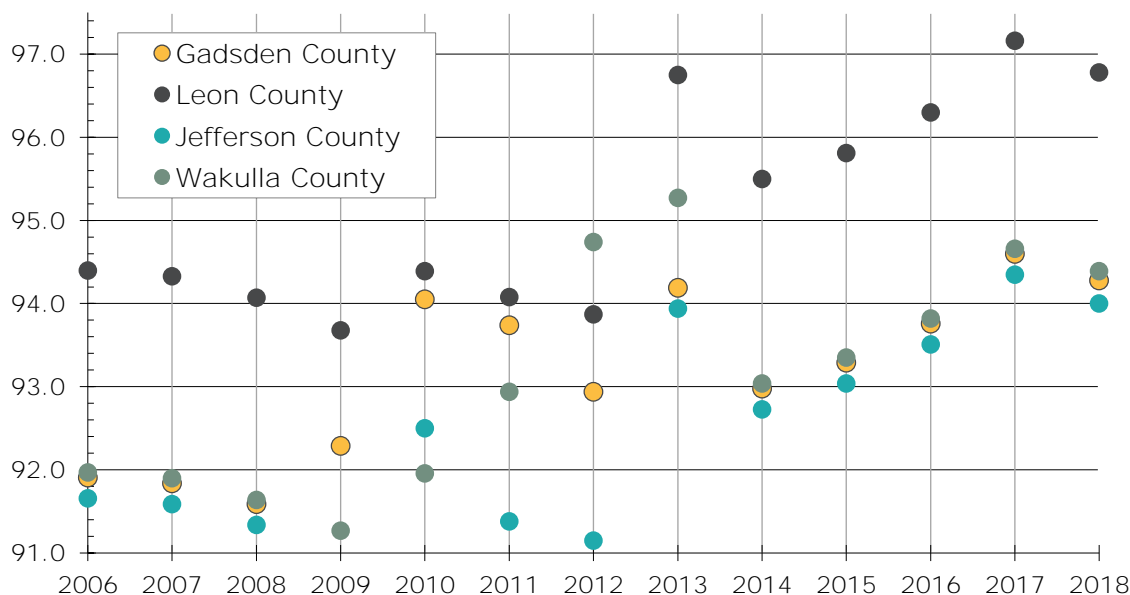
### Florida Price Level Index

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 2018 FPLI, lives in Hillsborough County with an index value of 100.38. In 2018, the 11 counties with index values greater than 100.38 together accounted for 49.82% 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
2018	96.78	94.28	94.00	94.39

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 (2006-2018)**





## Economic Factors

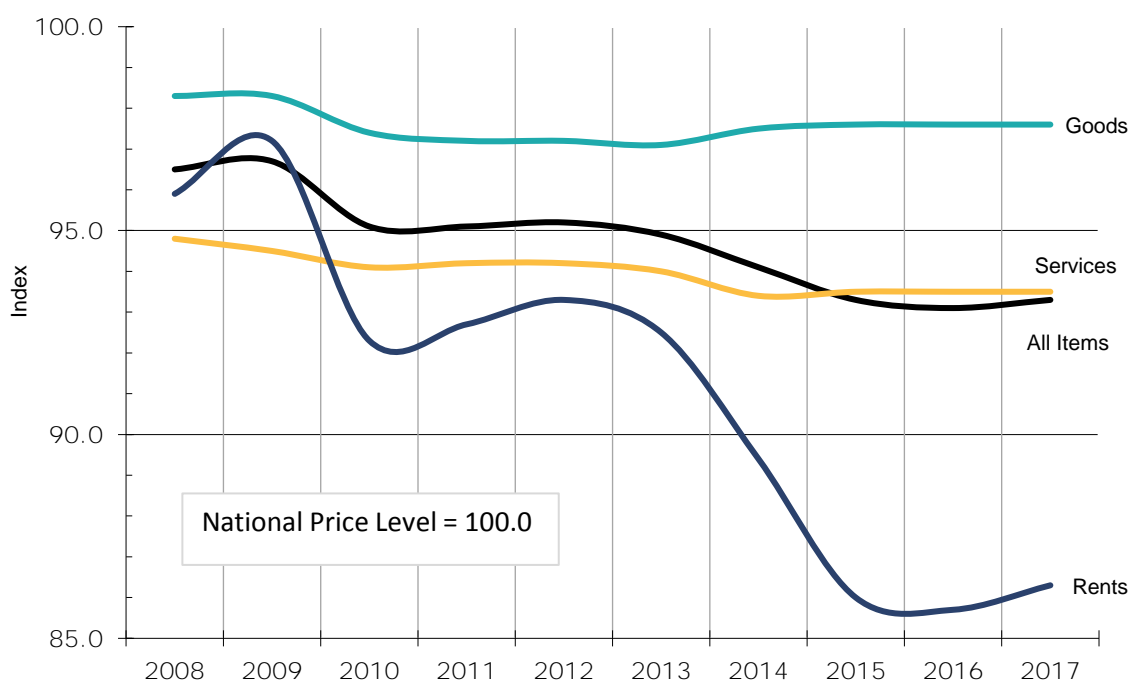
### Regional Price Parities

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	94.1	97.5	93.4	89.4
2015	93.3	97.6	93.5	86.0
2016	93.1	97.6	93.5	85.7
2017	93.3	97.6	93.5	86.3

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





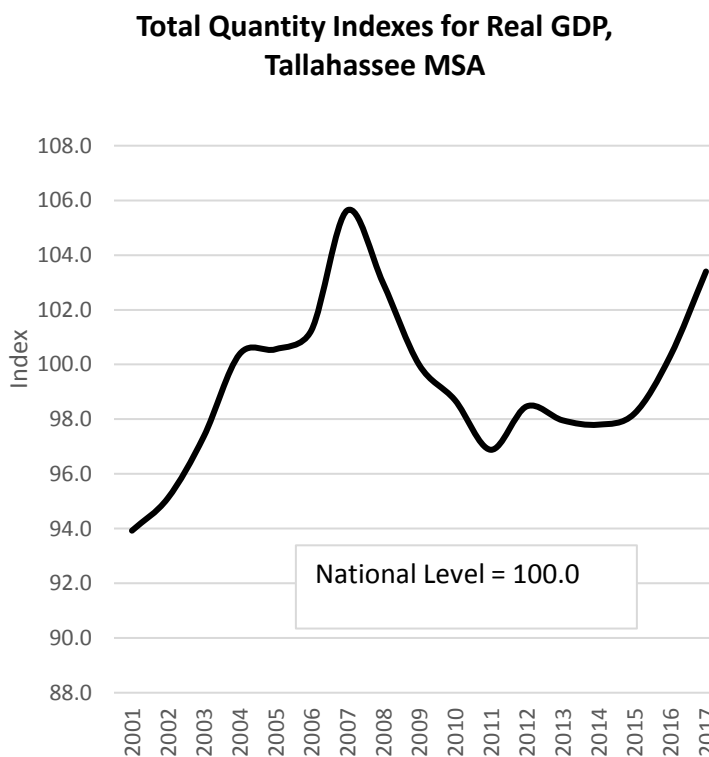


## Economic Factors

### Total Quantity Indexes for Real GDP

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	97.8
2015	98.2
2016	100.3
2017	103.4



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

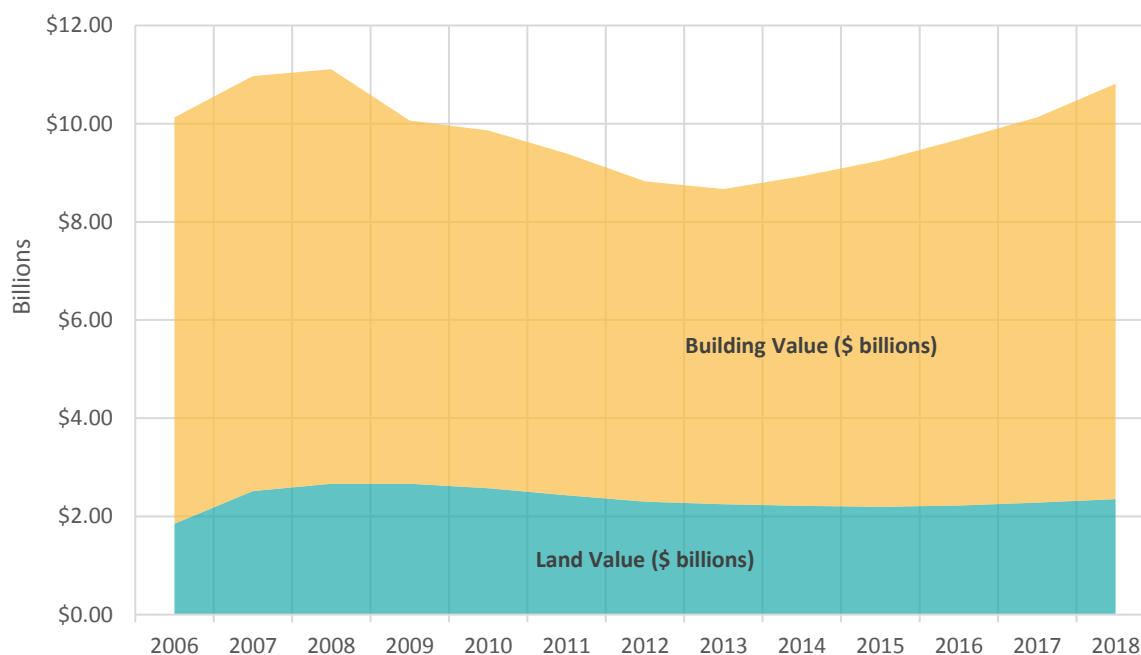
Trend: Residential property investment is a widespread method for local capital accumulation. Since 2013, acreage with homestead exemption has averaged 60,600 acres. Building value accounted for an average of 77% of total market value among homestead exempted properties since 2013. During 2014-2018, annual growth in total market value for homestead exempted properties averaged 4.5%.

Year	Parcel Count	Acreage*	Land Value (\$ billions)	Building Value (\$ billions)	Land Market Value per Acre	Building Market Value per SF
2006	54,967	60,486	\$1.85	\$8.27	\$30,613	\$84.45
2007	55,587	60,623	\$2.52	\$8.45	\$41,494	\$86.12
2008	56,206	61,105	\$2.67	\$8.44	\$43,631	\$84.64
2009	56,764	61,650	\$2.66	\$7.40	\$43,205	\$73.06
2010	56,788	61,603	\$2.58	\$7.29	\$41,823	\$71.67
2011	56,380	61,329	\$2.43	\$6.96	\$39,618	\$68.64
2012	56,373	61,240	\$2.30	\$6.53	\$37,553	\$64.34
2013	55,241	60,769	\$2.25	\$6.42	\$36,982	\$64.06
2014	54,786	60,756	\$2.22	\$6.71	\$36,461	\$67.16
2015	54,664	60,359	\$2.20	\$7.05	\$36,413	\$70.40
2016	54,866	60,547	\$2.22	\$7.46	\$36,683	\$73.92
2017	55,253	60,566	\$2.28	\$7.84	\$37,709	\$76.99
2018	55,740	60,768	\$2.35	\$8.46	\$38,738	\$82.10

\*Acreage based on <0.2% condominium homesteads.

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

Parcels with Homestead Exemption in Leon County: Total Market Value





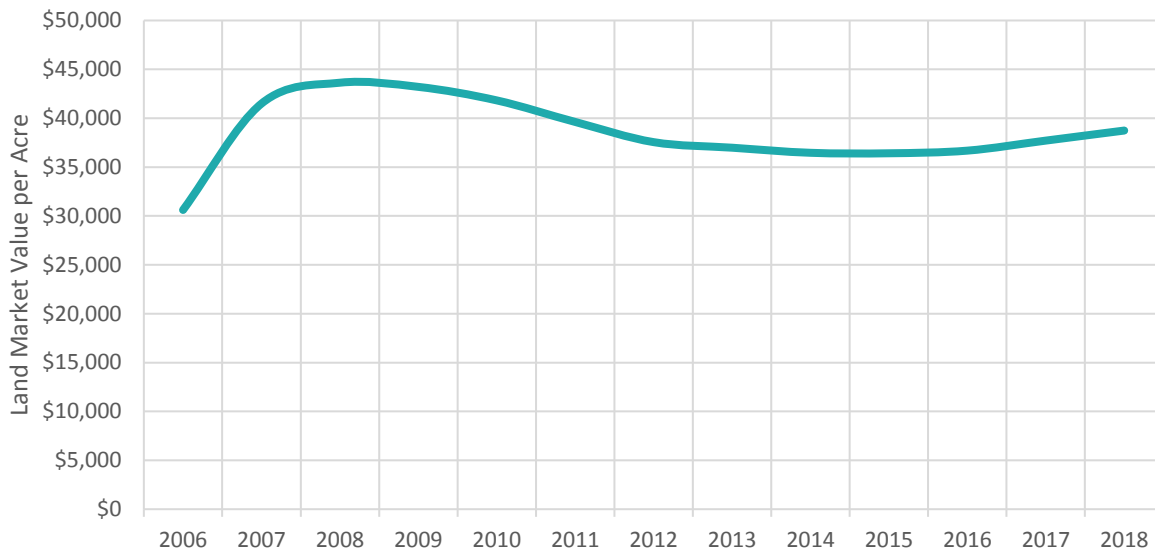
## Economic Factors

### Capital Accumulation

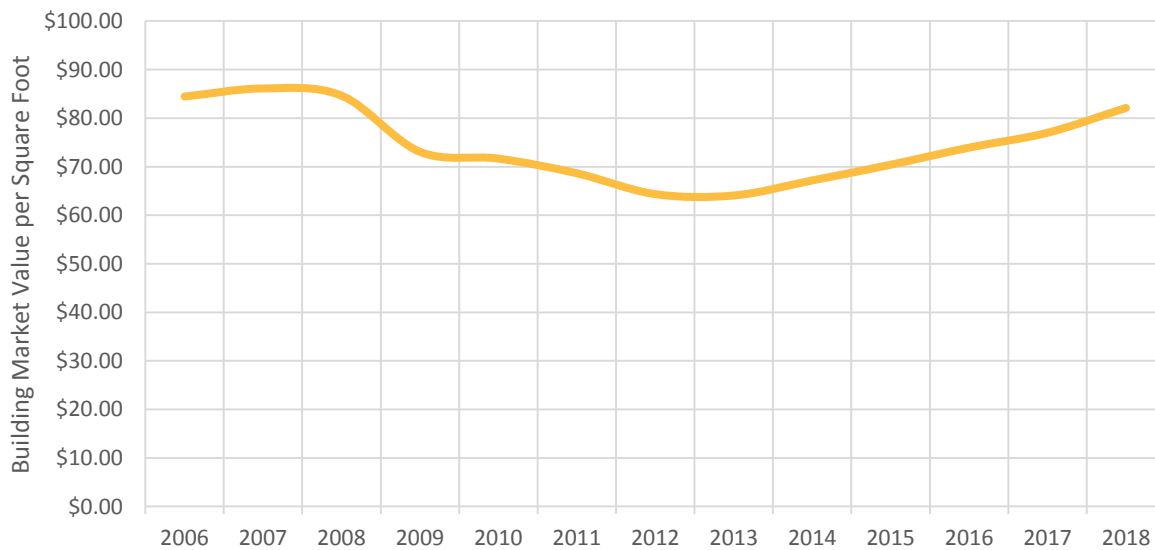
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Homestead Exemption Parcels in Leon County: Land Market Value per Acre



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





## Education

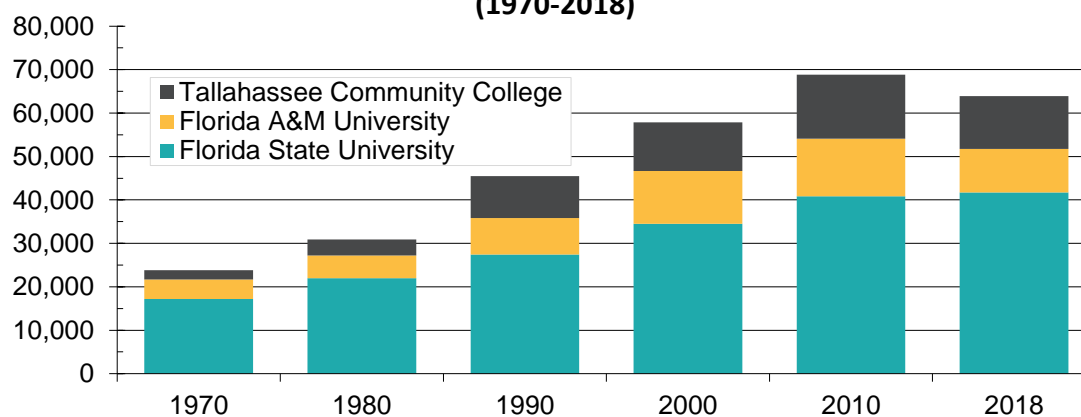
### Higher Education Institutions: Enrollment

Trend: Combined enrollment for Florida State University, Florida A&M University, and Tallahassee Community College has stabilized after declining in 2012-2014.

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
2018	41,717	10,021	12,174	63,912

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  
(1970-2018)**





## Education

### Higher Education Institutions:

#### Enrollment by Level and Full-Time Status

Trend: Between 1990 and 2017, the proportion of full-time students rose from 69% to 77% 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
2015	55,279	9,924	50,950	14,253
2016	54,699	10,090	50,598	14,191
2017	54,634	10,243	49,652	15,225

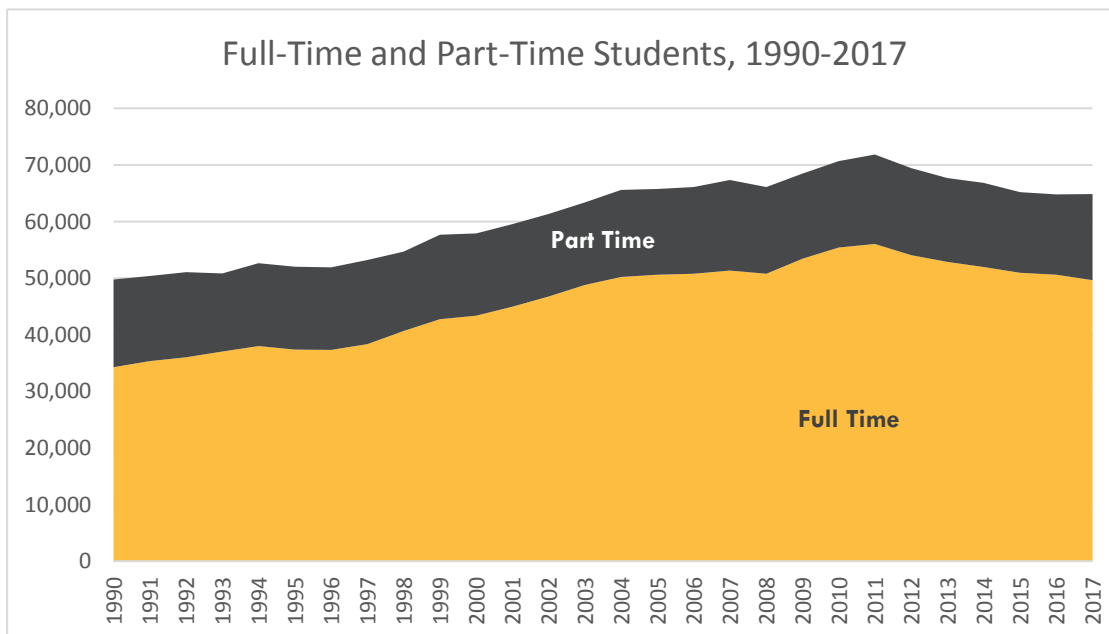
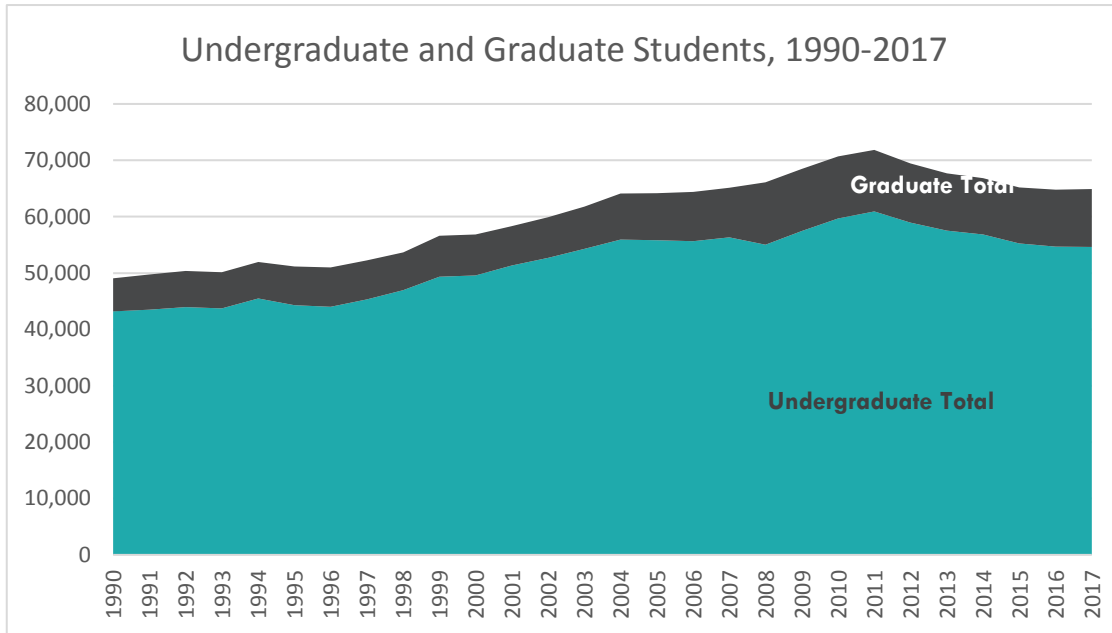
Note: Includes Aveda Institute-Tallahassee, Flagler College-Tallahassee, Florida A&M University, Florida State University, ITT Technical Institute-Tallahassee, Lively Technical Center, and Tallahassee Community College.

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

## Education

### Higher Education Institutions:

### Enrollment by Level and Full-Time Status



## Education

### Higher Education Institutions: Degrees Conferred

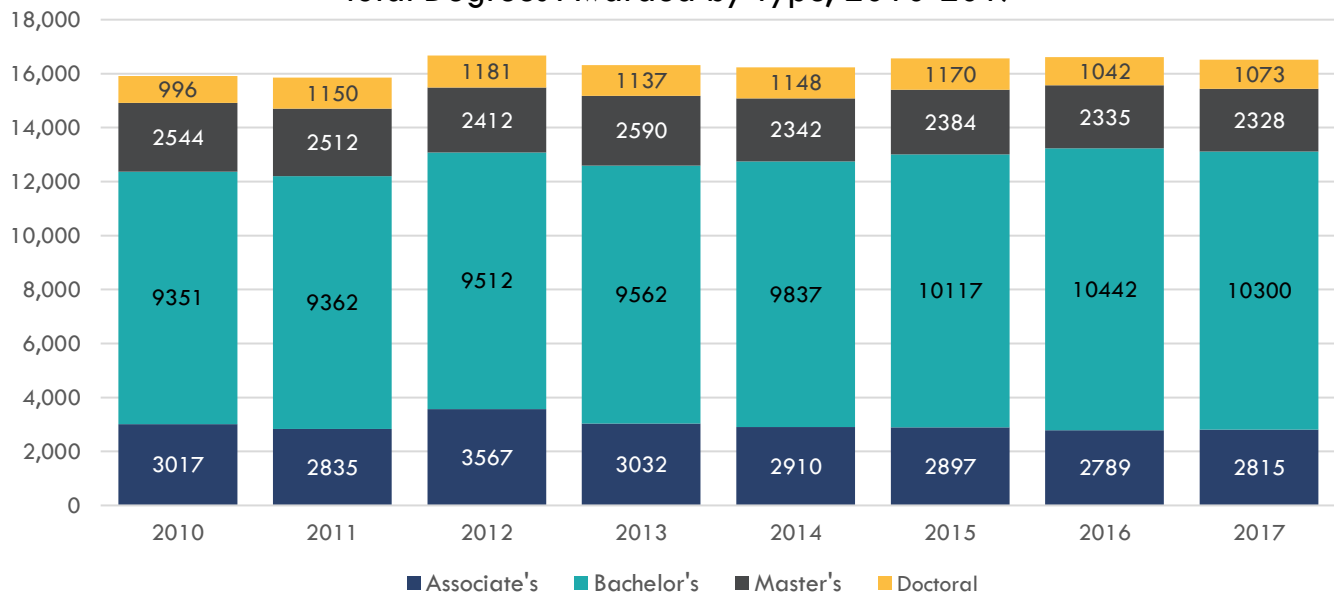
Trend: Between 2010 and 2017, on average some 16,300 postsecondary degrees were conferred annually by higher education institutions, including an average of more than 1,100 doctoral degrees per year.

School	Degree Type	2010	2011	2012	2013	2014	2015	2016	2017
Flagler College-Tallahassee	Bachelor's	183	180	186	136	172	189	140	134
Florida A&M University	Associate's	47	67	59	102	113	67	54	48
	Bachelor's	1,242	1,296	1,466	1,488	1,560	1,507	1,676	1,555
	Master's	341	294	270	274	277	231	271	252
	Doctoral*	313	332	331	401	335	353	326	327
Florida State University	Associate's	98	111	163	133	192	177	192	190
	Bachelor's	7,926	7,886	7,860	7,938	8,105	8,421	8,626	8,611
	Master's	2,203	2,218	2,142	2,316	2,065	2,153	2,064	2,076
	Doctoral*	683	818	850	736	813	817	716	746
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	2,577
Year Total		15,908	15,859	16,672	16,321	16,237	16,568	16,608	16,516

\* Includes research/scholarship and professional practice degrees.

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

**Total Degrees Awarded by Type, 2010-2017**





## Education

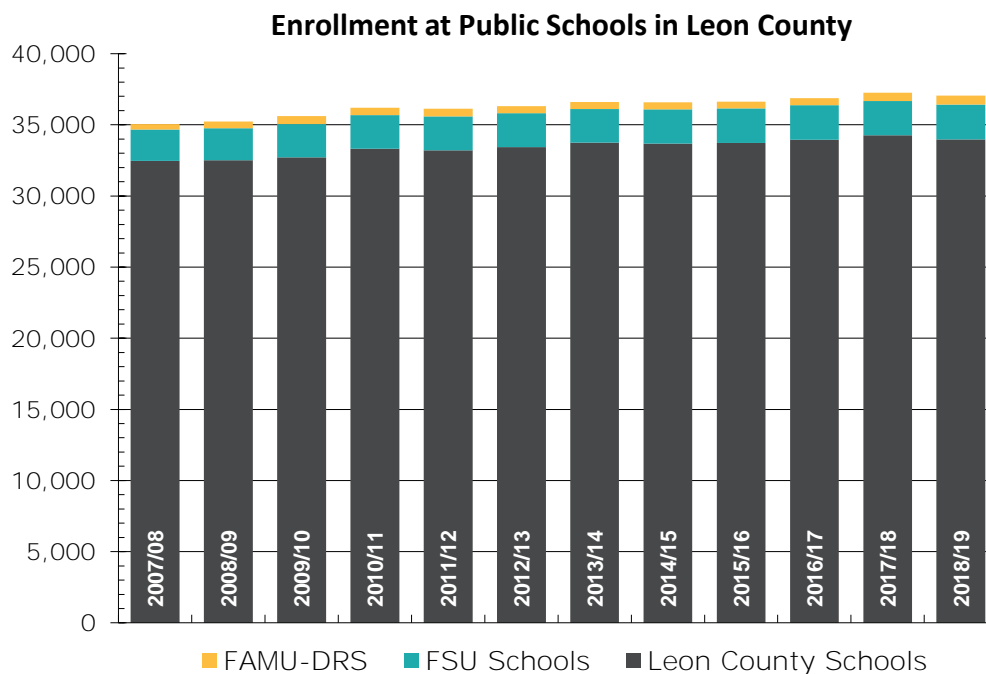
### Public Schools: Enrollment

Trend: Public school enrollment has averaged around 36,500 over the past ten years, growing at an average annual rate of 0.5%.

Year	FAMU-DRS	FSU Schools	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	2,405	34,268	37,259	1.0%
2018/19	630	2,443	33,978	37,051	-0.6%

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

Source: Florida Department of Education





## Education

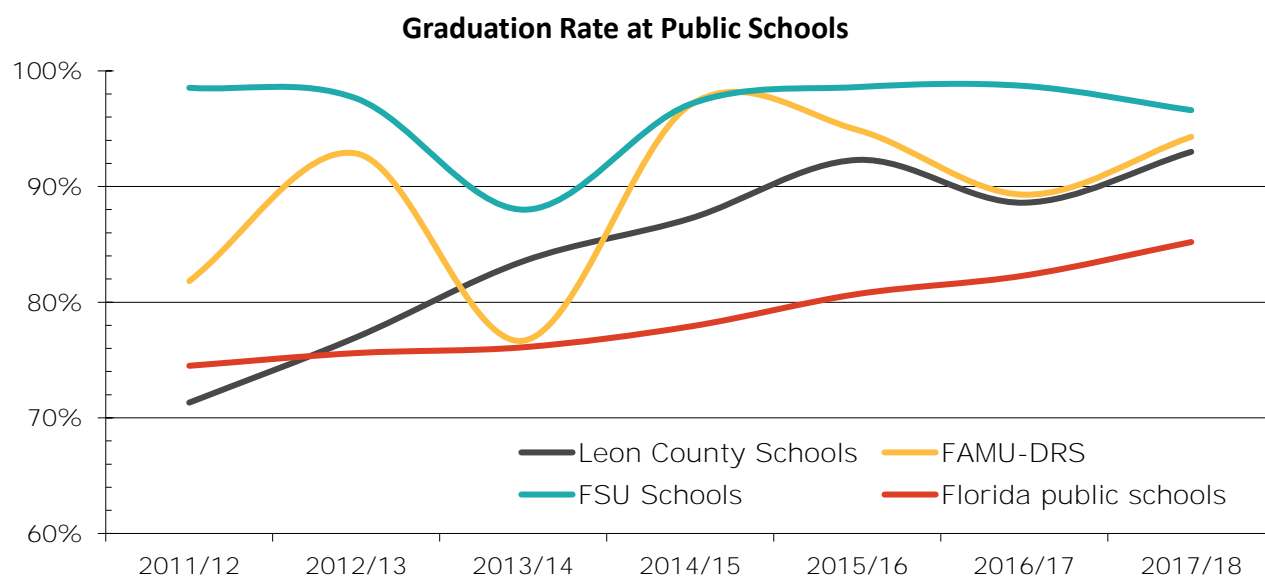
### Public Schools: Graduation Rate

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

Year	Leon County Schools		FAMU-DRS		FSU Schools		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%
2017/18	2,102	93.0%	33	94.3%	144	96.6%	178,637	85.2%

Note: Graduation rate determined as percent of cohort. FAMU-DRS and FSU Schools 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 2014 and 2019, more than half of all public schools in Leon County earned a grade of A or B.

School Name	2019 Grade	2018 Grade	2017 Grade	2016 Grade	2015 Grade	2014 Grade	2013 Grade	2012 Grade	2011 Grade	2010 Grade
Amos P. Godby High School	C	C	C	C	B	C	C	B	C	B
Apalachee Elementary School	C	C	C	C	C	B	C	D	C	C
Astoria Park Elementary School	C	D	C	D	D	C	C	B	A	A
Augusta Raa Middle School	C	B	B	B	B	A	C	B	A	A
Bond Elementary School	D	D	C	C	F	D	D	C	C	B
Buck Lake Elementary School	A	A	A	A	A	A	A	A	A	A
Canopy Oaks Elementary School	B	C	B	C	B	C	B	A	A	A
Chaires Elementary School	C	B	A	B	B	A	B	A	A	A
Deerlake Middle School	A	A	A	A	A	A	A	A	A	A
Desoto Trail Elementary School	A	A	A	A	A	A	A	A	A	A
Elizabeth Cobb Middle School	B	B	B	B	B	A	B	A	A	A
Fairview Middle School	B	C	C	B	A	B	B	B	B	A
FAMU-DRS*	I	C	C	B	C	C	C	D	C	C
FSU Schools*	A	A	A	A	A	A	A	A	A	A
Fort Braden Elementary School	C	C	C	C	C	B	C	C	B	C
Frank Hartsfield Elementary School	C	D	C	D	D	D	C	B	C	C
Gilchrist Elementary School	A	A	A	A	A	A	A	A	A	A
Governors Charter Academy	C	C	D	C	C	C	C			
Griffin Middle School	D	C	C	C	D	C	D	C	C	C
Hawks Rise Elementary School	A	A	A	A	A	A	A	A	A	A
J. Michael Conley Elementary School	C	C	B	C	B	C	B	A	A	B
James Rickards High School	B	C	C	D	C	C	C	C	B	A
John G. Riley Elementary School	D	C	D	C	D	D	C	C	B	C
Kate Sullivan Elementary School	B	C	B	C	B	B	B	A	B	B
Killearn Lakes Elementary School	A	A	A	A	A	A	A	A	A	A
Lawton Chiles High School	A	A	A	A	A	A	A	A	A	A
Leon High School	A	A	A	B	A	B	B	A	B	B
Lillian Ruediger Elementary School	C	C	C	C	D	C	C	B	C	C
Lincoln High School	B	B	B	C	A	A	B	A	B	A
Oak Ridge Elementary School	C	D	D	D	F	C	D	C	B	C
Pineview Elementary School	C	F	C	D	C	C	C	B	C	A
R. Frank Nims Middle School	C	C	C	D	D	C	D	D	C	F
Roberts Elementary School	A	A	A	A	A	A	A	A	B	A
Sabal Palm Elementary School	B	C	C	C	D	D	C	C	B	B
SAIL	B	C	B	B	A	A	A	A	A	B
School of Arts & Science Center	B	A	A							
Sealey Elementary School	B	C	C	B	B	C	B	A	B	B
Springwood Elementary School	C	D	C	C	C	B	C	C	B	C
Swift Creek Middle School	A	A	A	A	A	A	A	A	A	A



## Education

### Public Schools:

### School Grades

Trend: Between 2014 and 2019, more than half of all public schools in Leon County earned a grade of A or B.

School Name	2019 Grade	2018 Grade	2017 Grade	2016 Grade	2015 Grade	2014 Grade	2013 Grade	2012 Grade	2011 Grade	2010 Grade
Tallahassee School of Math & Science	A	B	B	C						
The School of Arts & Sciences	A	A	A	A	A	A	A	A	A	A
Walter T. Moore Jr. Elementary School	C	B	B	C	B	B	B	A	B	A
William J. Montford III Middle School	A	A	A	A	A	A	A	A	A	A
Woodville Elementary School	C	C	C	A	C	C	C	B	A	B

District Name	2019 Grade	2018 Grade	2017 Grade	2016 Grade	2015 Grade	2014 Grade	2013 Grade	2012 Grade	2011 Grade	2010 Grade
Leon County Schools	B	B	B	B	A	B	C	B	A	A

\*FAMU-DRS and FSU Schools 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 2010-2017, an average of over 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

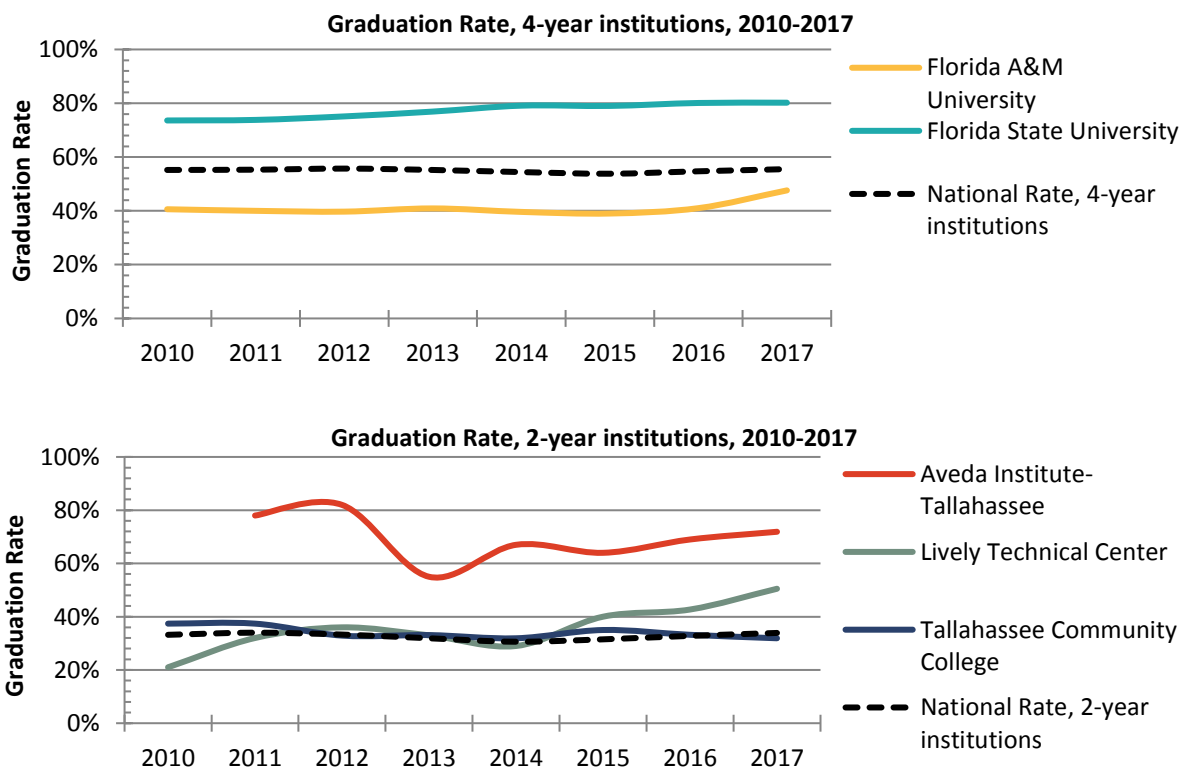
School	2010	2011	2012	2013	2014	2015	2016	2017
Aveda Institute-Tallahassee	-	35	69	93	46	67	100	82
Florida A&M University	855	655	641	759	827	913	1,108	945
Florida State University	4,559	4,469	4,651	4,697	3,951	4,704	4,769	4,927
Lively Technical Center	151	253	368	288	233	250	256	267
Tallahassee Community College	771	882	827	838	801	733	838	801
Year Total	6,336	6,294	6,556	6,675	5,858	6,667	7,071	7,022

#### Graduation Rate\*

School	2010	2011	2012	2013	2014	2015	2016	2017
Aveda Institute-Tallahassee		78%	82%	55%	67%	64%	69%	72%
Florida A&M University	41%	40%	40%	41%	40%	39%	41%	48%
Florida State University	74%	74%	75%	77%	79%	79%	80%	80%
Lively Technical Center	21%	32%	36%	33%	29%	40%	43%	51%
Tallahassee Community College	37%	37%	33%	33%	32%	35%	33%	32%
National Rate, 4-year institutions	55%	55%	56%	55%	54%	54%	55%	56%
National Rate, 2-year institutions	33%	34%	33%	32%	31%	32%	33%	34%

\* 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\*

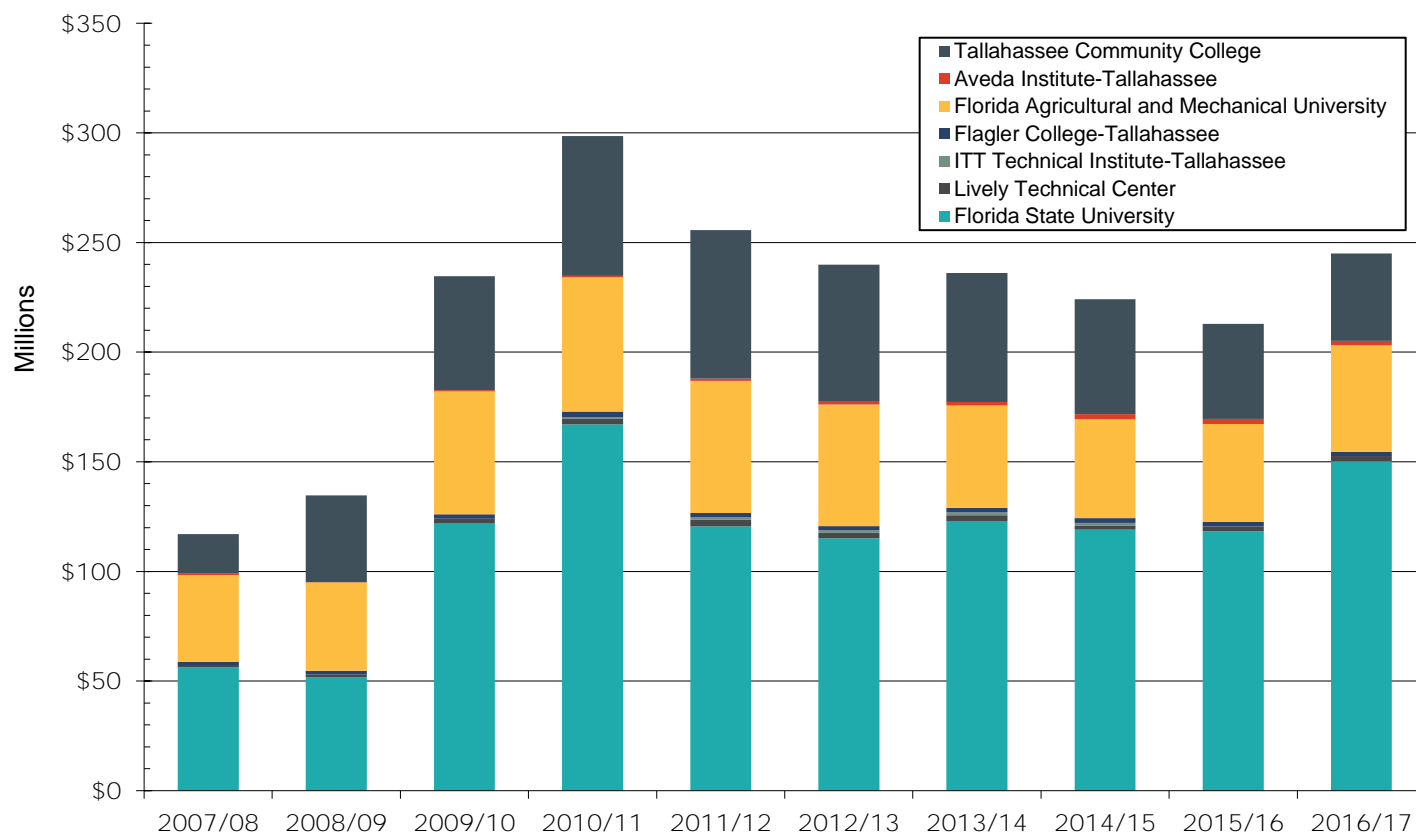
Trend: During 2012/13 to 2016/17, financial aid received by undergraduate students from all sources averaged \$231.6 million per year. FSU accounted for approximately 54%; TCC, 22%; FAMU, 21%; and other institutions, <3%.

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
2016/17	\$1,998,147	\$1,921,383	\$48,639,363	\$150,310,663		\$2,302,467	\$39,819,172

\*Total amount of federal, state, local, institutional, or other sources of grant aid dollars awarded to 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.

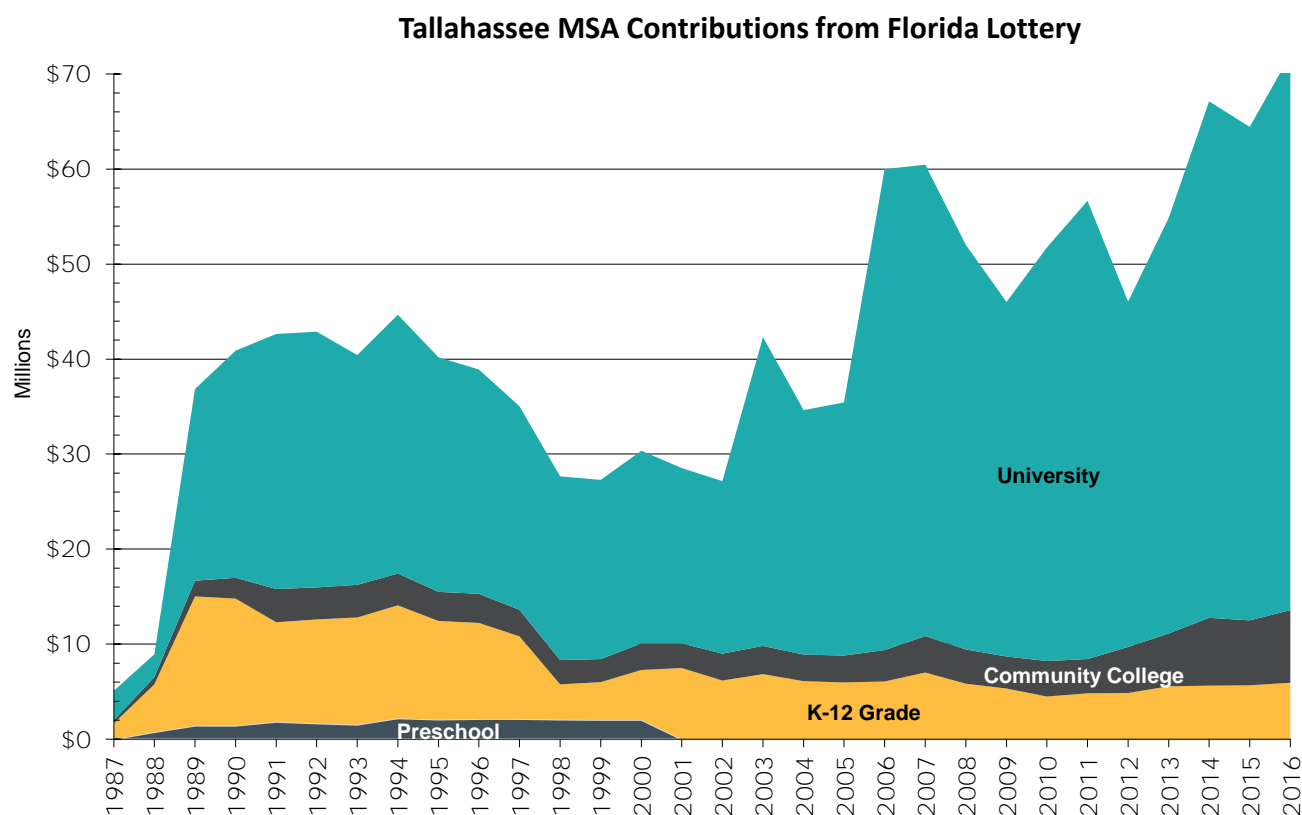
Fall Year	Contributions to County				Contributions by School Level			
	Gadsden	Jefferson	Leon	Wakulla	Preschool	K-12 Grade	Community College	University
1987	\$309,186	\$87,536	\$4,574,423	\$114,178	\$0	\$1,682,411	\$314,406	\$3,088,506
1988	\$1,233,498	\$358,387	\$6,894,949	\$440,144	\$739,555	\$5,016,869	\$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 1.2% per year on average between 2005 and 2018.

Year	Residential Electric Service Points	Commercial Service Points (Non-Demand)
2004	87,152	11,135
2005	89,468	11,430
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
2018	102,395	12,066

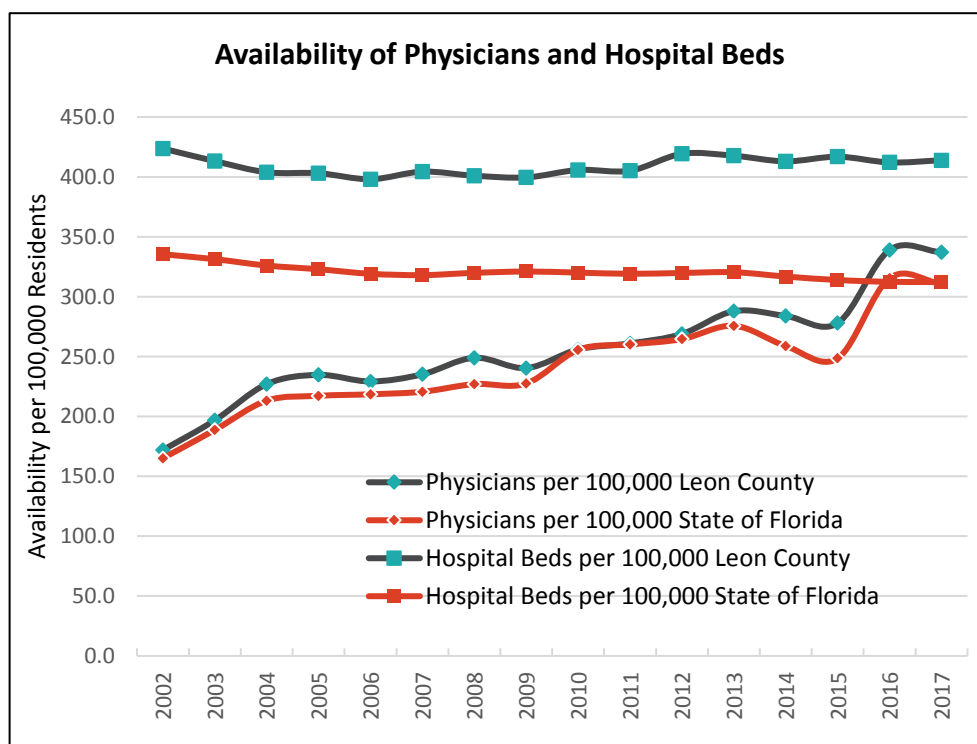
Source: City of Tallahassee, Electric Utilities



Trend: During 2002-2017, availability of hospital beds in Leon County was on average 28% higher than Florida's, and availability of physicians was almost 6% 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
2002	171.9	165.1	423.7	335.4
2003	196.8	188.7	413.2	331.3
2004	227.0	213.2	403.9	326.0
2005	234.7	217.2	403.1	322.9
2006	229.2	218.5	398.1	319.1
2007	235.2	220.6	404.4	318.0
2008	249.0	227.0	401.0	319.9
2009	240.4	227.5	399.6	321.0
2010	256.0	255.6	405.8	320.1
2011	261.0	260.1	405.2	319.1
2012	268.9	264.6	419.3	319.8
2013	287.9	275.7	417.7	320.4
2014	283.9	258.8	413.0	316.8
2015	278.0	248.6	416.9	313.9
2016	339.0	315.5	412.1	312.4
2017	337.1	310.6	413.9	312.3

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



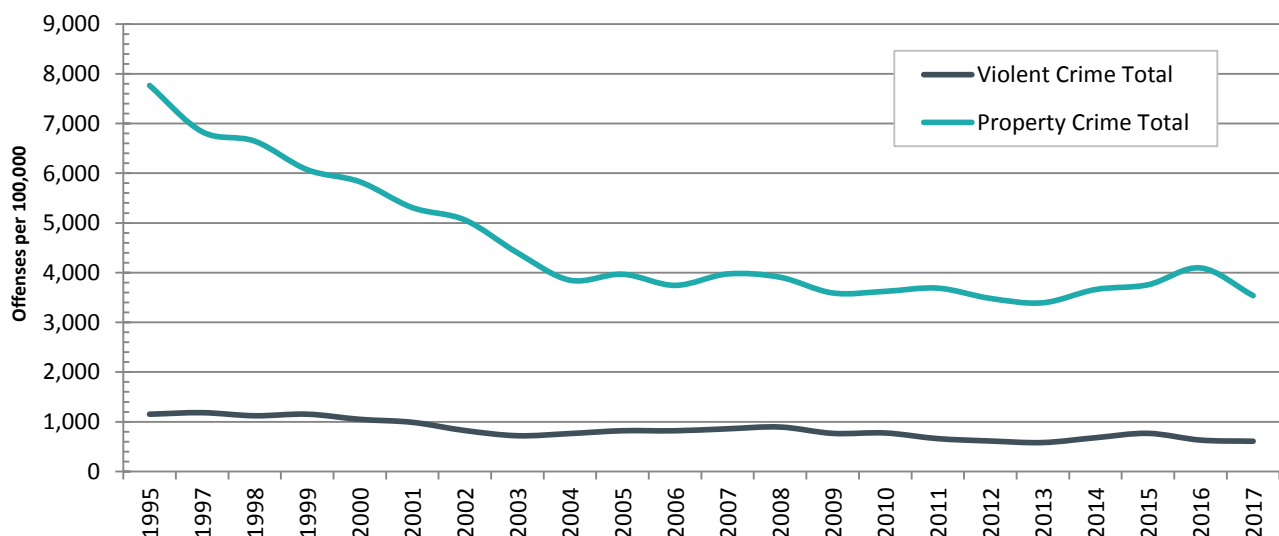
Trend: On a per capita basis, the overall frequency of property and violent crimes in the Tallahassee MSA in the 2010s has been lower than during the 1990s.

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
2017	6.5	75.0	107.7	419.1	608.4	662.3	2,620.8	254.9	3,538.0

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.

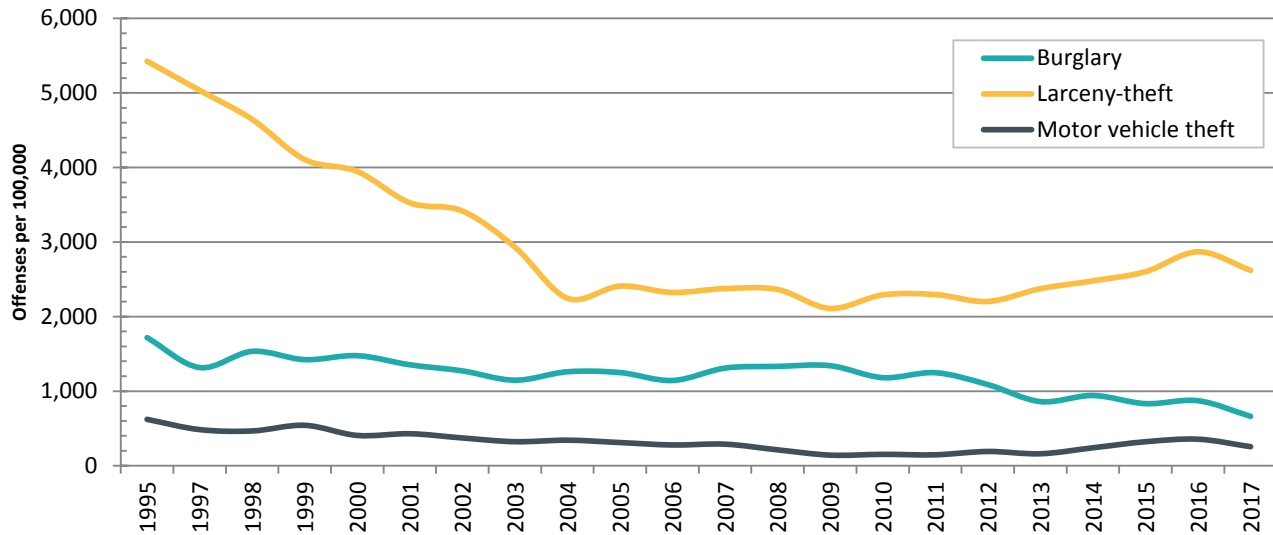
Source: FBI UCR

**Index of Property and Violent Crimes in Tallahassee MSA**

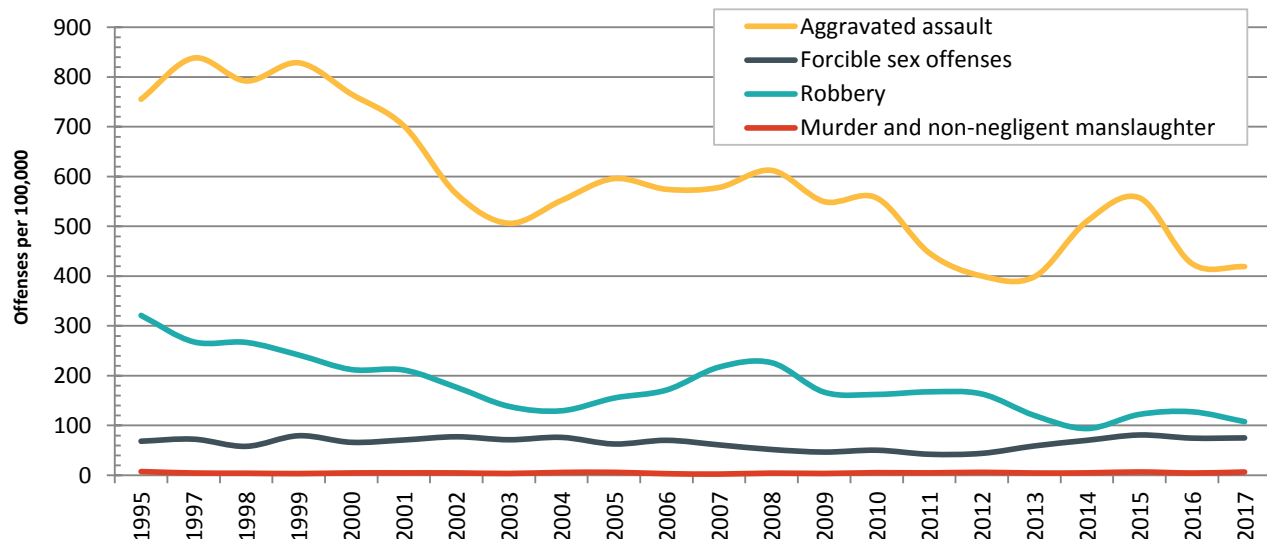


Trend: On a per capita basis, the overall frequency of property and violent crimes in the Tallahassee MSA in the 2010s has been lower than during the 1990s.

**Index of Property Crime Offenses in Tallahassee MSA**



**Index of Violent Crime Offenses in Tallahassee MSA**



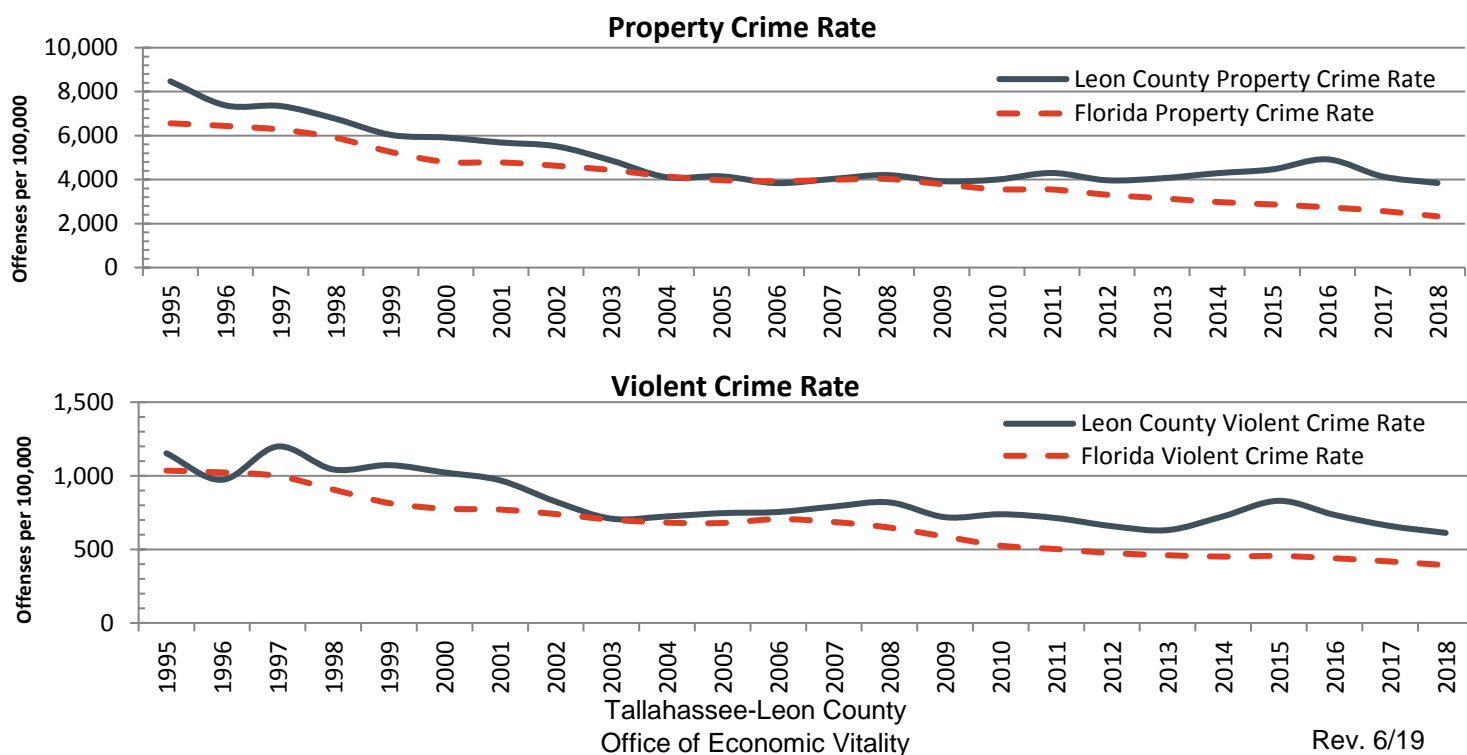
**Community and Environment**
**Public Safety:**
**Leon County Crime Rate**

Trend: On a per capita basis, the overall frequency of property and violent crimes in Leon County in the 2010s 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	1,035.0
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	4,149.1	724.1	681.5
2005	4,149.6	3,974.9	746.2	679.1
2006	3,842.2	3,926.2	753.8	705.8
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	3,313.5	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	455.3
2016	4,921.2	2,742.2	734.2	439.2
2017	4,143.5	2,571.8	658.9	417.7
2018	3,843.9	2,328.4	612.0	393.0

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

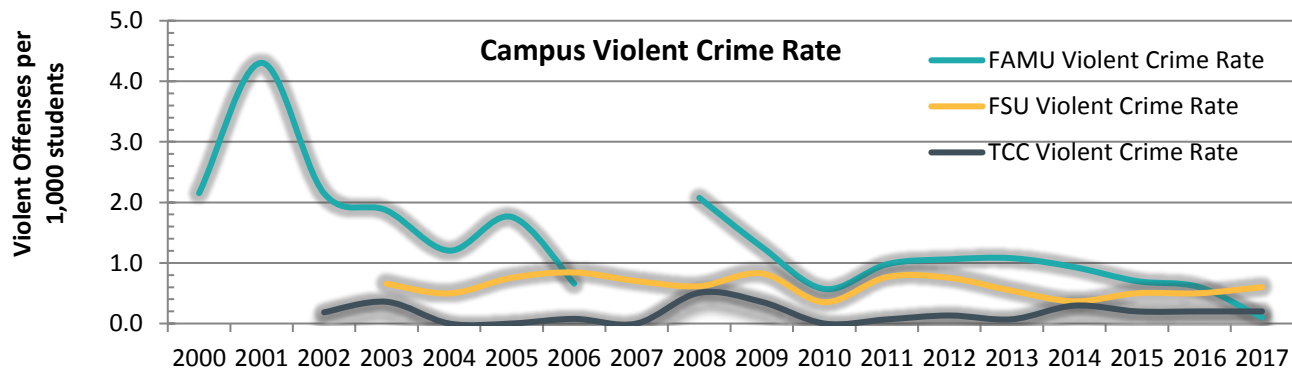
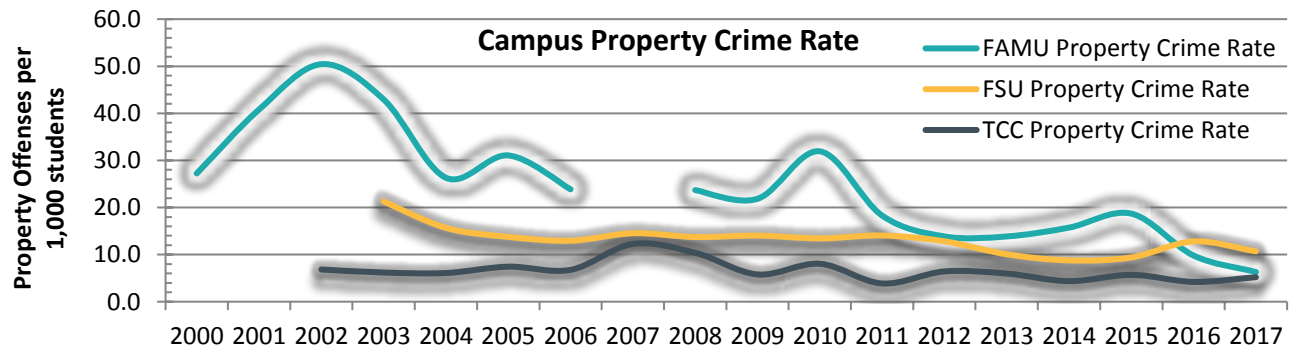


Trend: On a per student basis, the frequency of both violent and property crimes on the campuses of FAMU, FSU, and TCC have been lower in the 2010s than they were in the 2000s.

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
2017	6.3	10.7	5.2	0.1	0.6	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**

#### **2018 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	4.09500
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	0.03380
Inside City Limits Total		19.29120
Outside City Limits Total		15.19120
Downtown Improvement Area		20.29120

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*

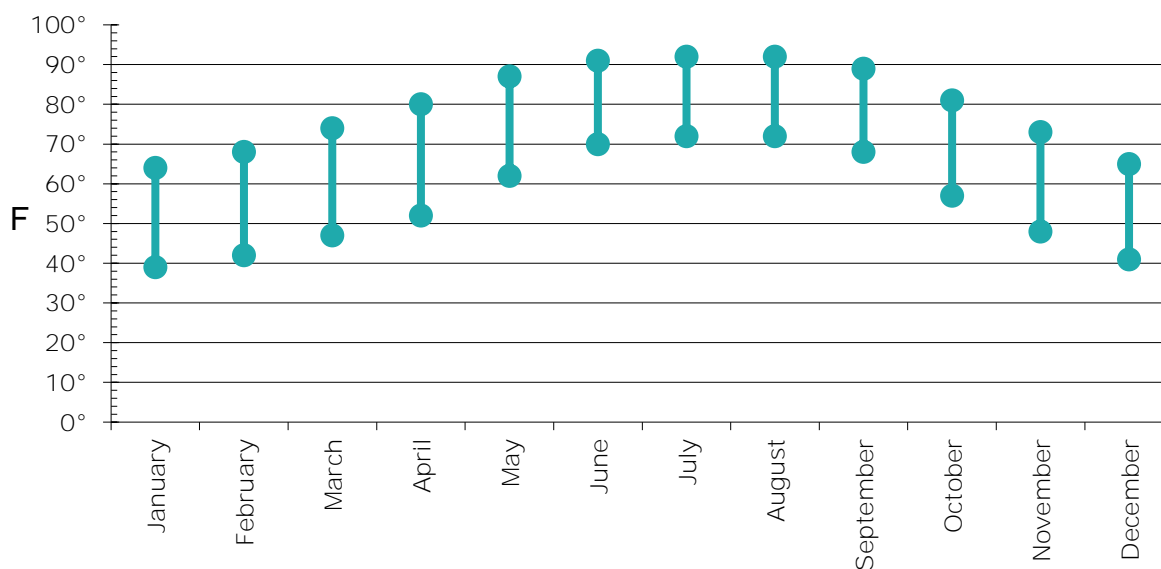
Trend: Tallahassee has a mild, moist climate characteristic of the Gulf States, experiencing a subtropical summer similar to the rest of Florida. In contrast to the Florida peninsula, Northwest Florida of which Tallahassee is a part, experiences four seasons. Prevailing winds average 6.2 miles per hour 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
<i>Annual</i>	<i>79.5</i>	<i>55.8</i>	<i>91</i>	<i>30</i>	<i>115</i>	<i>59.2</i>

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**







## Community and Environment

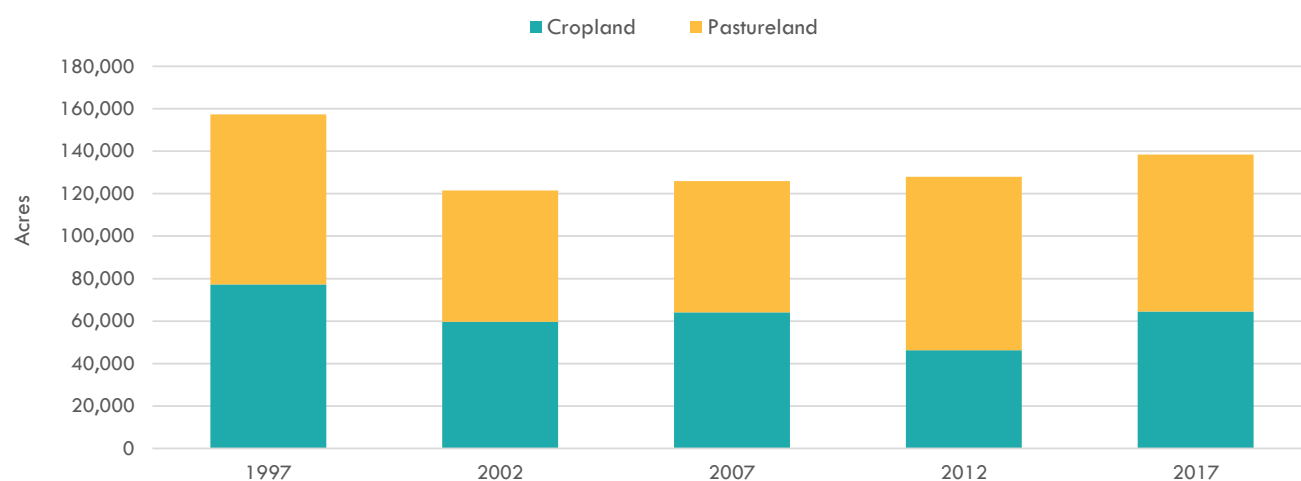
### Agriculture in Tallahassee MSA

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 2017, annual sales of crops and animals and animal products exceeded \$134 million.

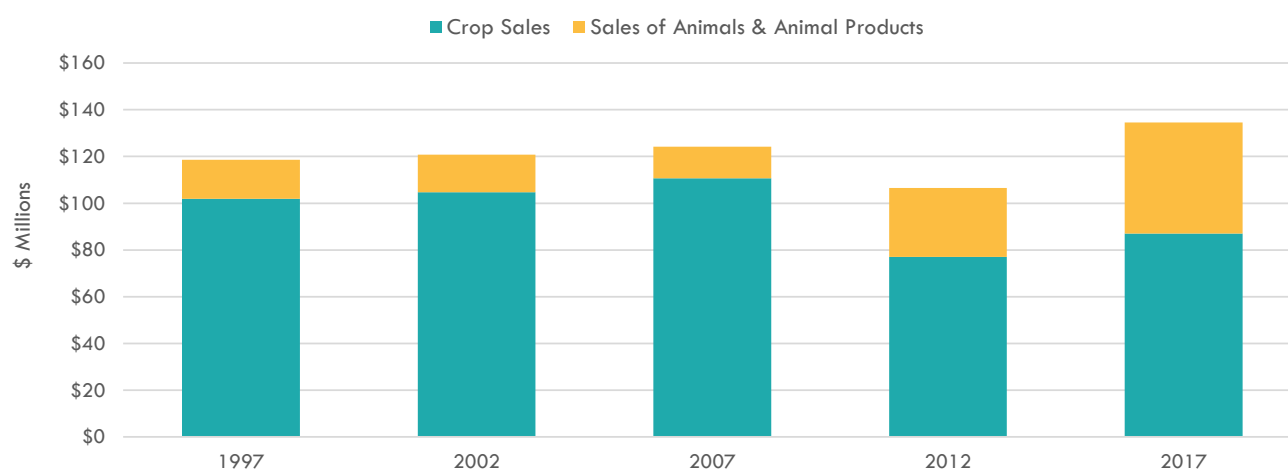
Year	Farmland Acreage in Tallahassee MSA		Agricultural Sales (\$1,000s)	
	Cropland	Pastureland	Crop Sales	Sales of Animals & Animal Products
1997	77,305	80,065	\$101,932	\$16,642
2002	59,617	61,881	\$104,659	\$16,115
2007	64,109	61,786	\$110,671	\$13,531
2012	46,237	81,696	\$77,070	\$29,494
2017	64,542	73,869	\$87,008	\$47,514

Source: USDA, Census of Agriculture

### Farmland Acreage in Tallahassee MSA



### Agricultural Sales in Tallahassee MSA

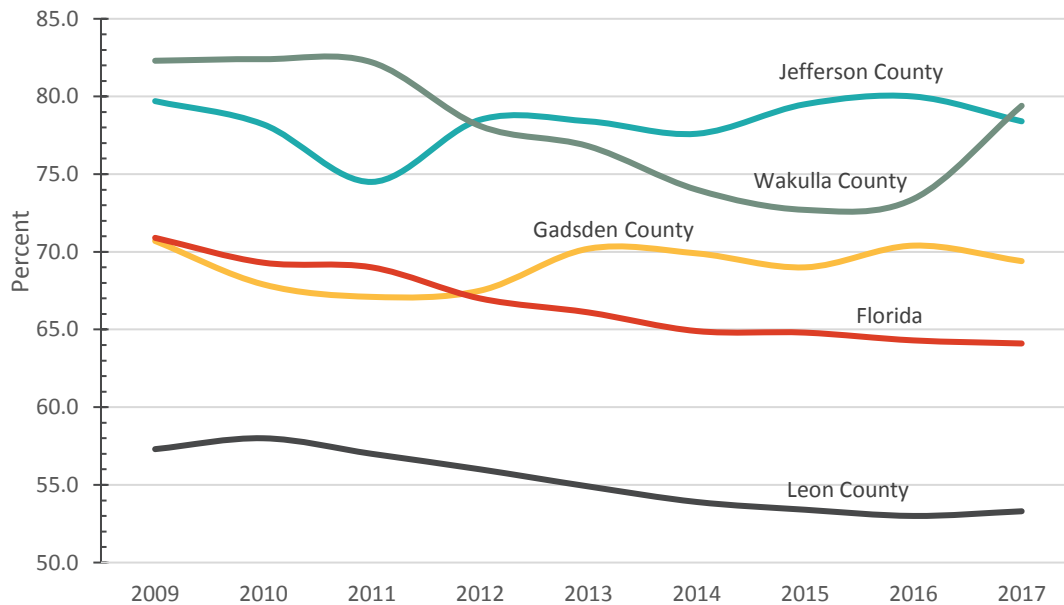


Trend: Homeownership rates in the Tallahassee MSA are highest in Jefferson and Wakulla counties. Due in part to its student population, Leon County's homeownership rate is the lowest in the Tallahassee MSA and lower than the State rate.

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
2016	53.0	80.0	70.4	73.4	64.3
2017	53.3	78.4	69.4	79.4	64.1

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

**Homeownership Rate in Tallahassee MSA**



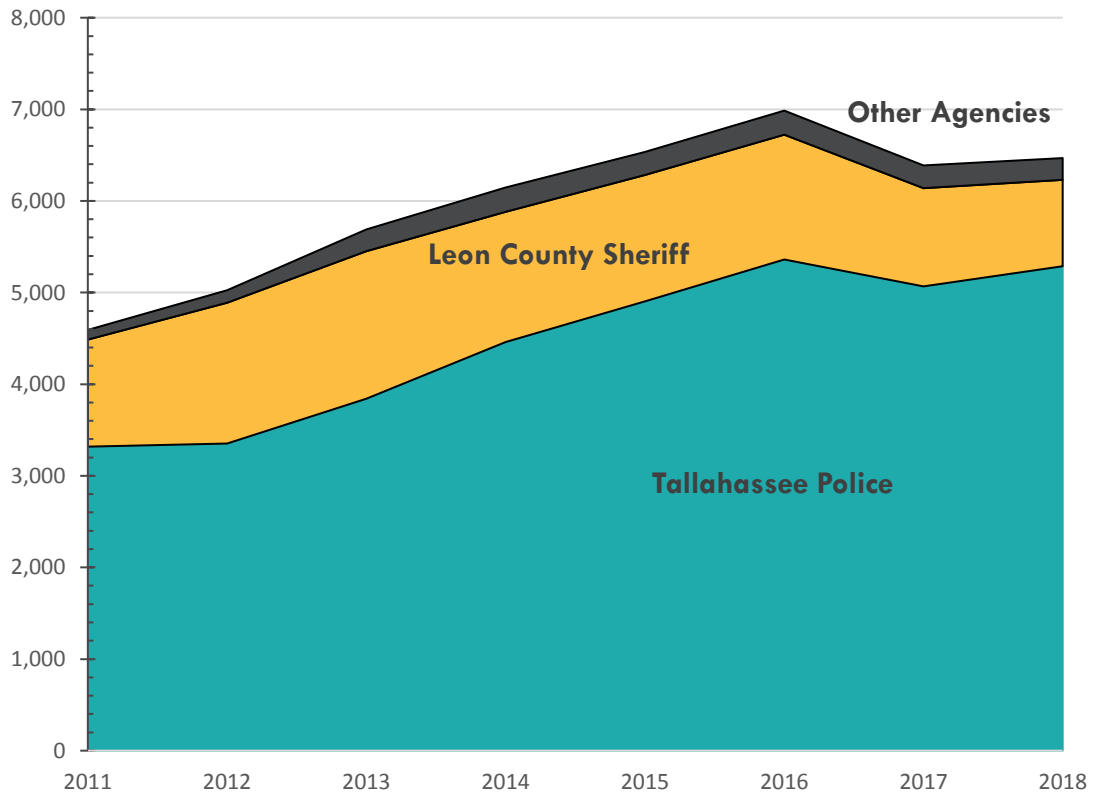
Trend: Between 2011 and 2018, there were on average 5,979 motor vehicle crashes in Leon County each year (or about 16 per day), with an annual average of 19 traffic fatalities.

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
2018	5,289	942	238	6,469	11

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



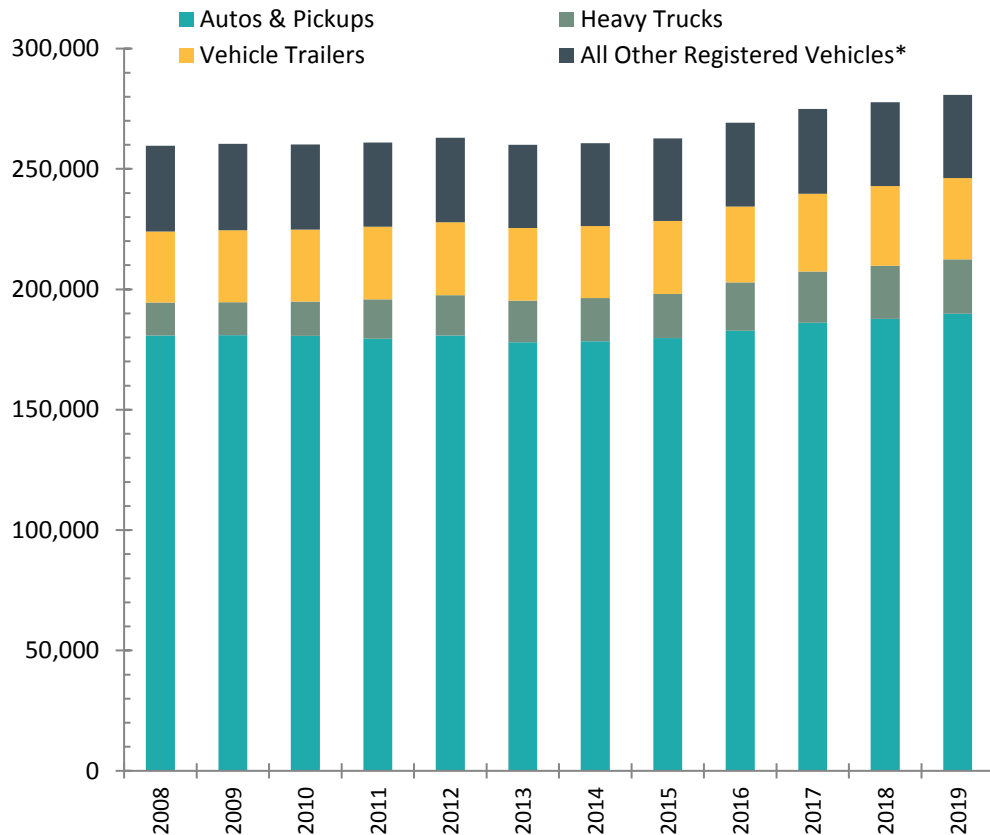
Trend: Total registered vehicles increased 7.9% from 2010 to 2019, by an average of 0.8% per year. Autos and pickups account for 68% of total registrations.

Year	Autos & Pickups	Heavy Trucks	Vehicle Trailers	All Other Registered Vehicles*	Total Registered Vehicles
2008	180,789	13,738	29,462	35,706	259,695
2009	180,948	13,688	29,908	35,873	260,417
2010	180,729	14,244	29,805	35,389	260,167
2011	179,549	16,233	30,284	34,961	261,027
2012	180,800	16,759	30,273	35,185	263,017
2013	178,047	17,299	30,110	34,555	260,011
2014	178,397	18,002	29,875	34,459	260,733
2015	179,723	18,362	30,374	34,191	262,650
2016	182,863	20,019	31,476	34,784	269,142
2017	186,122	21,228	32,410	35,184	274,944
2018	187,718	22,012	33,141	34,851	277,722
2019	189,913	22,603	33,723	34,475	280,714

\* Includes motorcycles, buses and tools, vessels, travel trailers, mobile homes.

Source: Florida Department of Highway Safety and Motor Vehicles

**Total Registered Vehicles in Leon County**





## Residential and Commercial Development

### Residential Development:

#### Residential Building Permits Issued

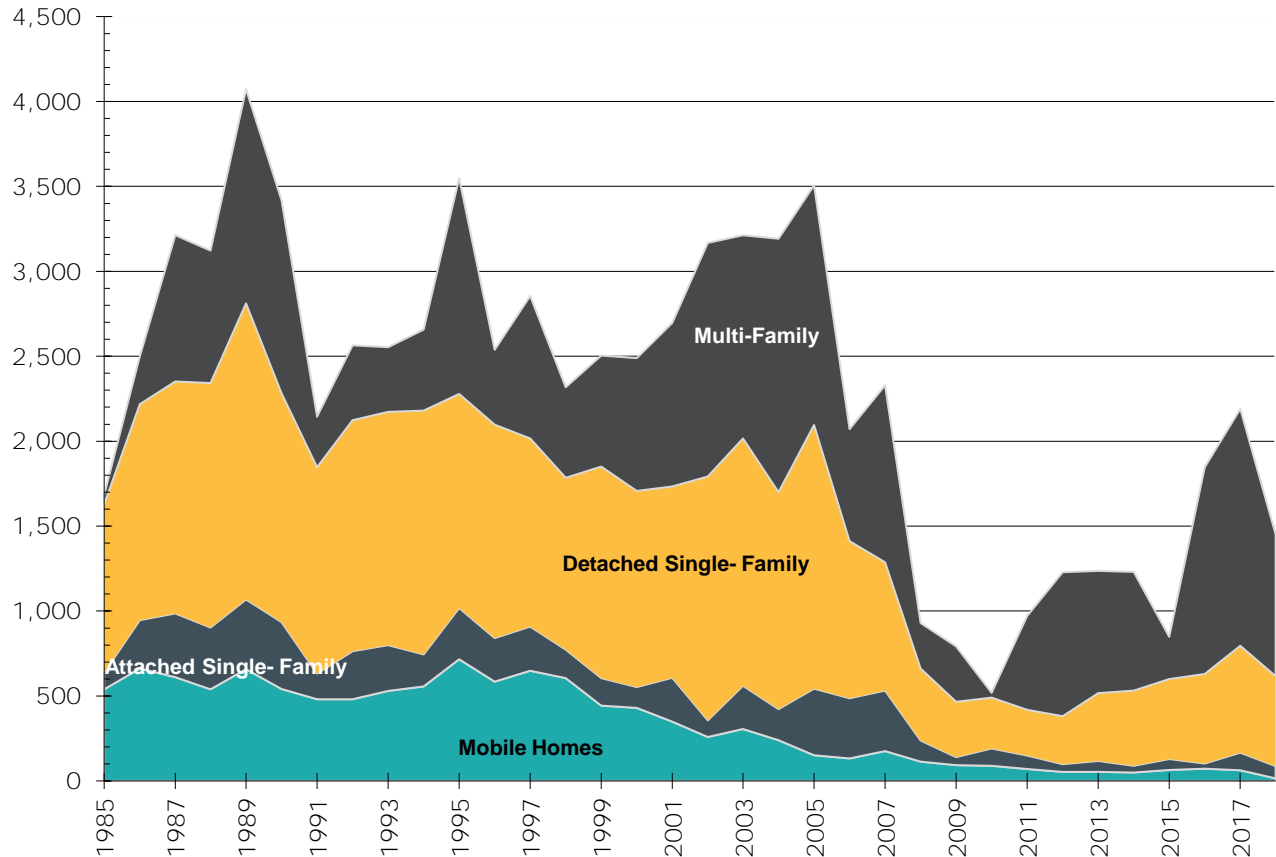
Trend: The overall level of residential building permits for new construction issued in Leon County has continued to steadily increase over the past few years. There were 734 permits issued for new single-family (detached and attached) homes in 2017, the highest level since 2007, but still well below 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	158.0%
2018	530	72	835	1,437	15	1,452	-21.3%

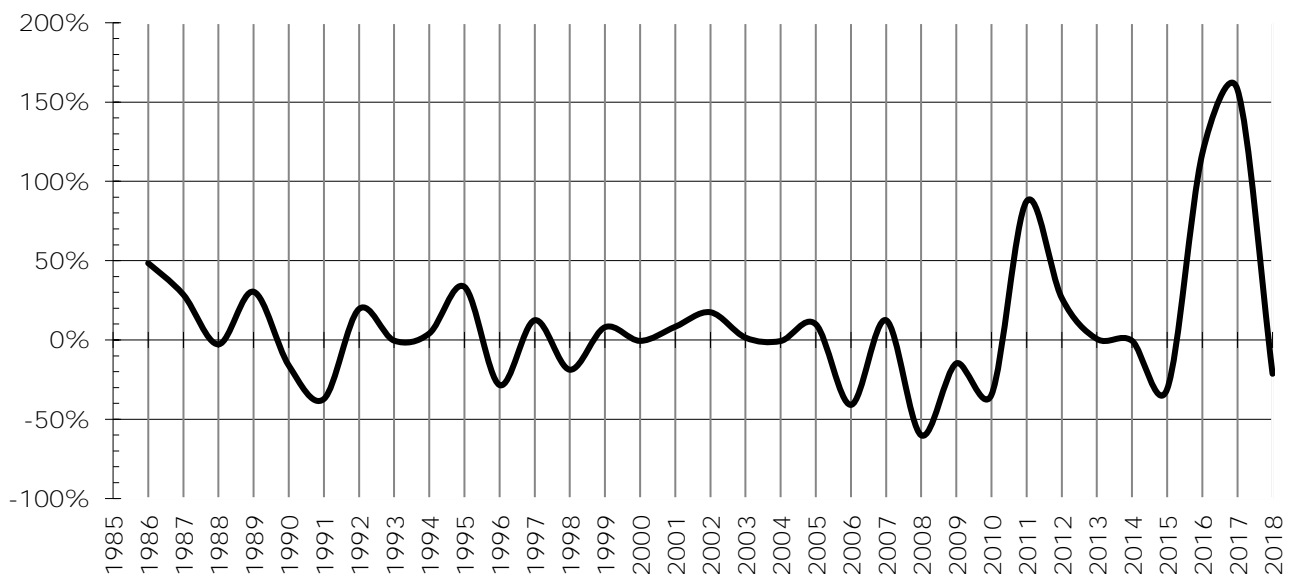
\*Mobile home figures do not include permits issued within mobile home parks

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

**Total Housing Units Permitted**



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



## Residential and Commercial Development

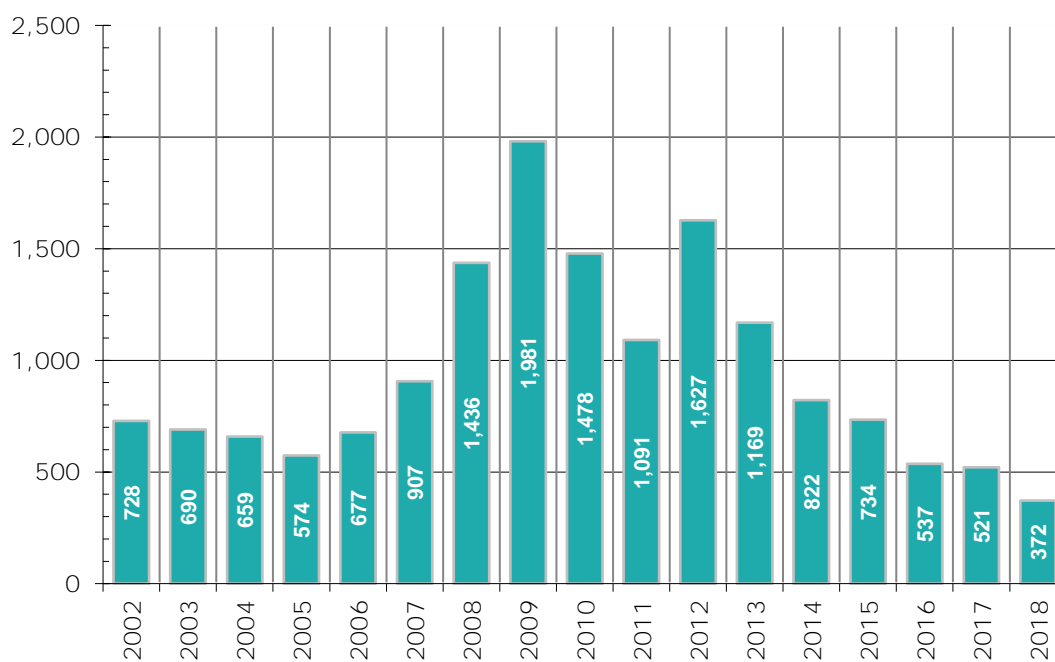
### Mortgage Foreclosure Cases

Mortgage foreclosure cases decreased by 29% in 2018 when compared to 2017, the sixth consecutive year of declining rates of mortgage foreclosure cases in Leon County and less than one-fifth of the 2009 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	1,436	58.3%
2009	1,981	38.0%
2010	1,478	-25.4%
2011	1,091	-26.2%
2012	1,627	49.1%
2013	1,169	-28.2%
2014	822	-29.7%
2015	734	-10.7%
2016	537	-26.8%
2017	521	-3.0%
2018	372	-28.6%

Source: Leon County Clerk of Courts

### Leon County Mortgage Foreclosure Cases



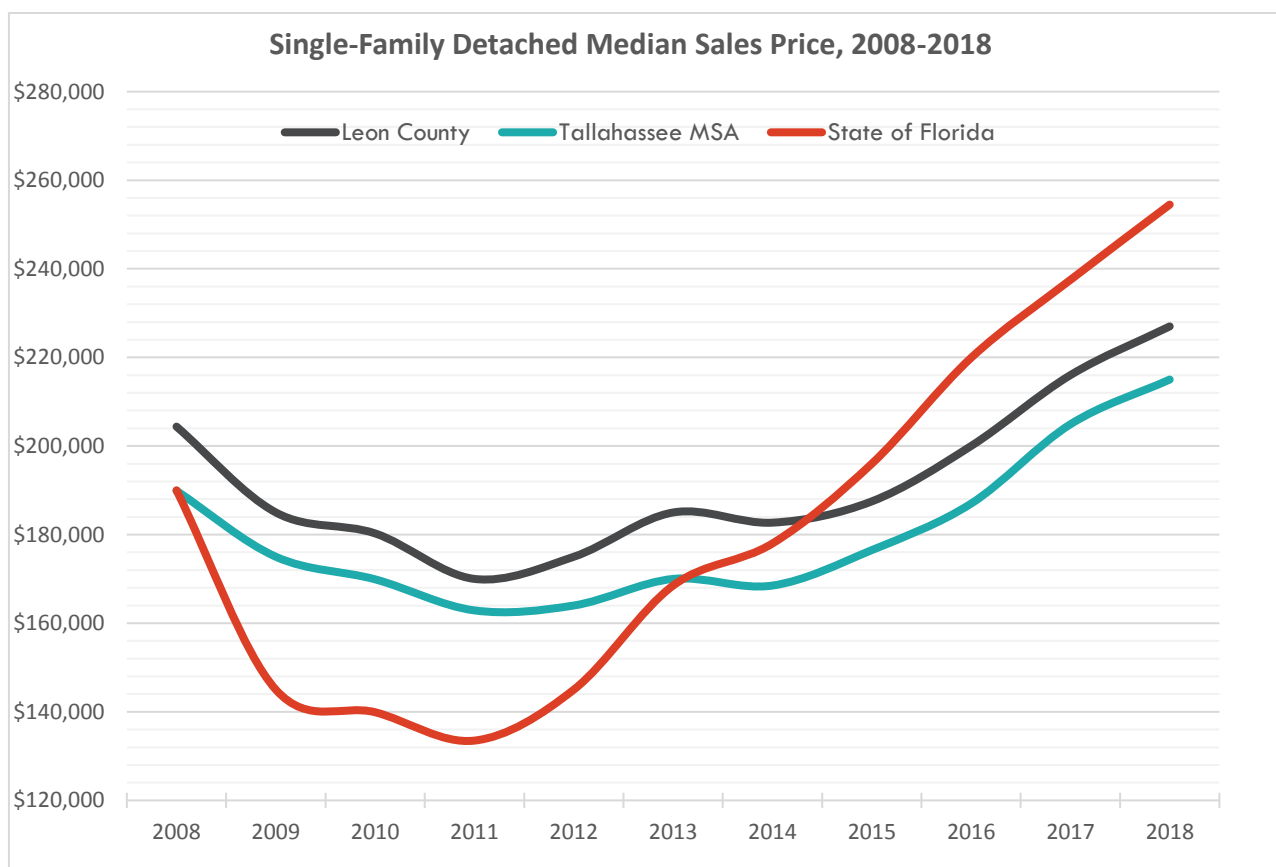
## Residential and Commercial Development

### Single-Family Detached Home Sales and Median Price

Trend: The median sales price for single family homes was up 5.1% in Leon County and 4.9% for the Tallahassee MSA in 2018 from 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	3,193	\$216,000	4,058	\$204,900	217,868	\$237,500
2018	3,156	\$227,000	4,037	\$215,000	227,246	\$254,500

Source: Tallahassee Board of Realtors MLS



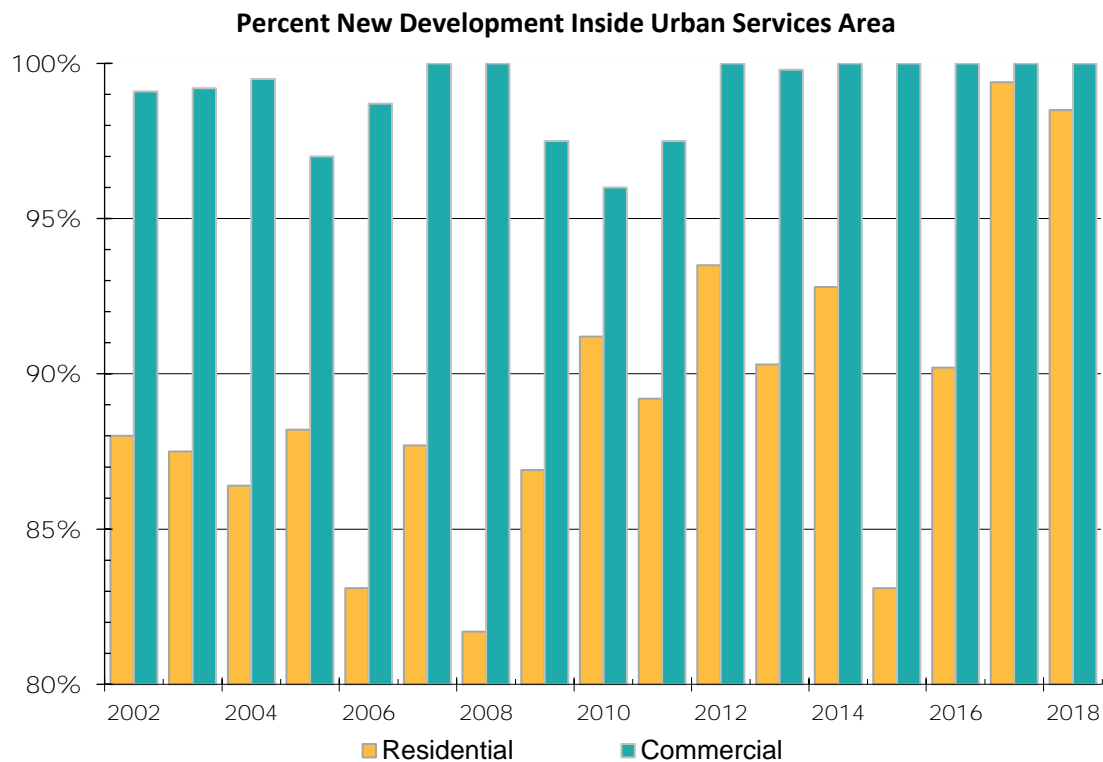


Trend: The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA). The location and size of the USA is based upon the area necessary to accommodate 90% of new residential dwelling units within the County by the Plan Horizon.

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%
2017	99.4%	100.0%
2018	98.5%	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



## Economic Factors

### Residential and Commercial Development:

#### Food Service, Apartments, and Lodging Facilities

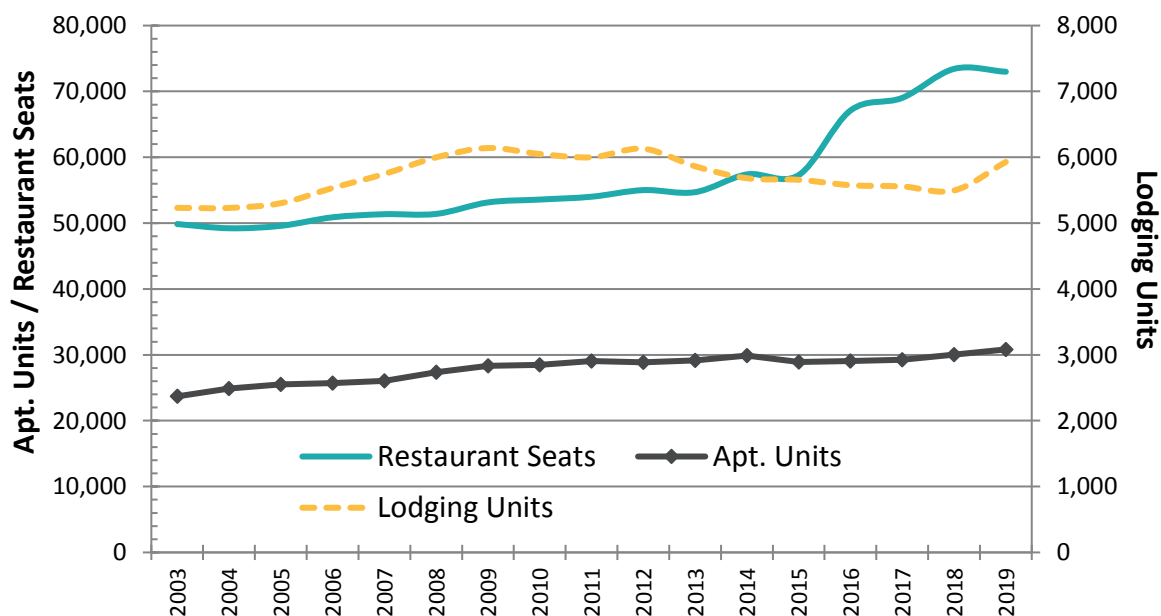
Trend: In the five years between 2014 and 2019, the total number of restaurant seats available in Leon County increased by 27%, apartment units increased 3%, and hotel and motel rooms and units available increased by around 4%.

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
2019	678	72,988	430	30,823	64	5,929

\*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**

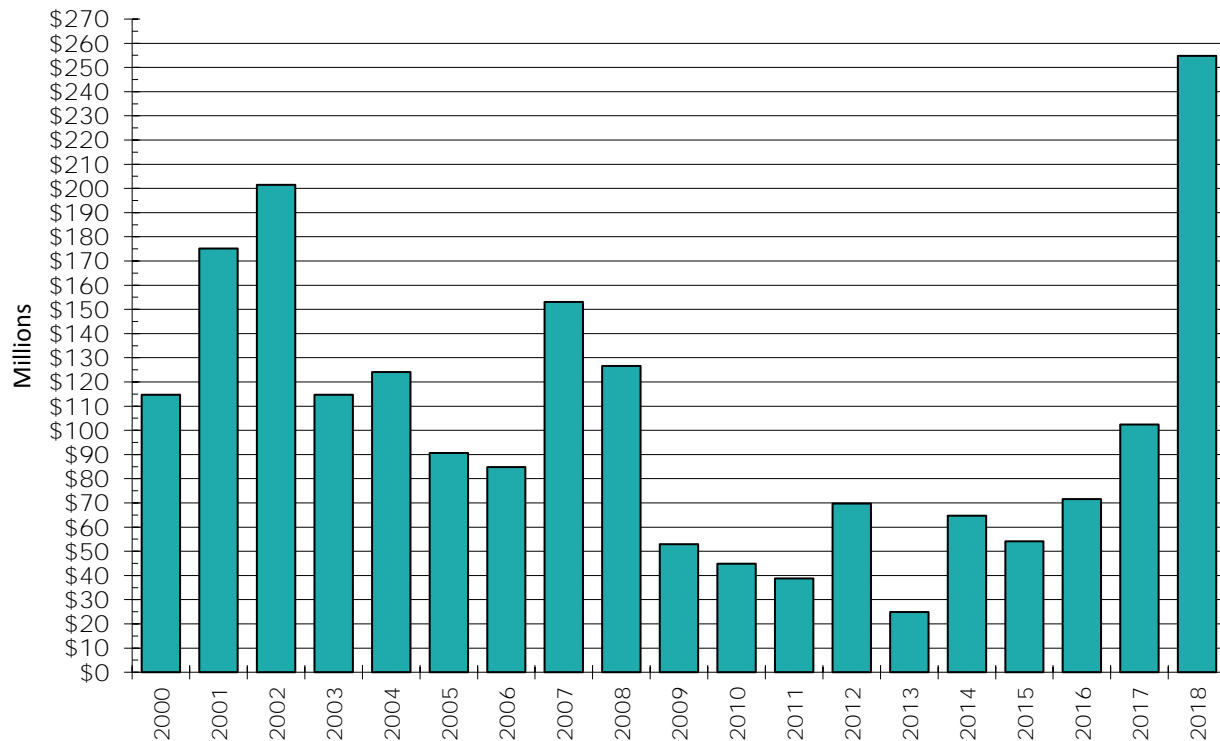


Trend: The value of commercial permits issued for new construction in 2018 totaled nearly \$254.8 million, with the Washington Square project accounting for 37% of total annual commercial permit value.

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2018 Dollars (\$Millions)
2000	119	\$78.7	\$114.7
2001	140	\$123.5	\$175.2
2002	129	\$144.3	\$201.5
2003	104	\$84.1	\$114.7
2004	106	\$93.4	\$124.1
2005	98	\$70.5	\$90.6
2006	109	\$68.0	\$84.7
2007	83	\$126.4	\$153.1
2008	88	\$108.5	\$126.6
2009	48	\$45.2	\$52.9
2010	30	\$39.0	\$44.9
2011	26	\$34.7	\$38.8
2012	54	\$63.7	\$69.7
2013	25	\$23.1	\$24.9
2014	39	\$60.9	\$64.6
2015	40	\$51.1	\$54.1
2016	55	\$68.5	\$71.6
2017	88	\$100.0	\$102.4
2018	67	\$254.8	\$254.8

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

**Value of Commercial Permits Issued in Leon County in 2018 dollars**





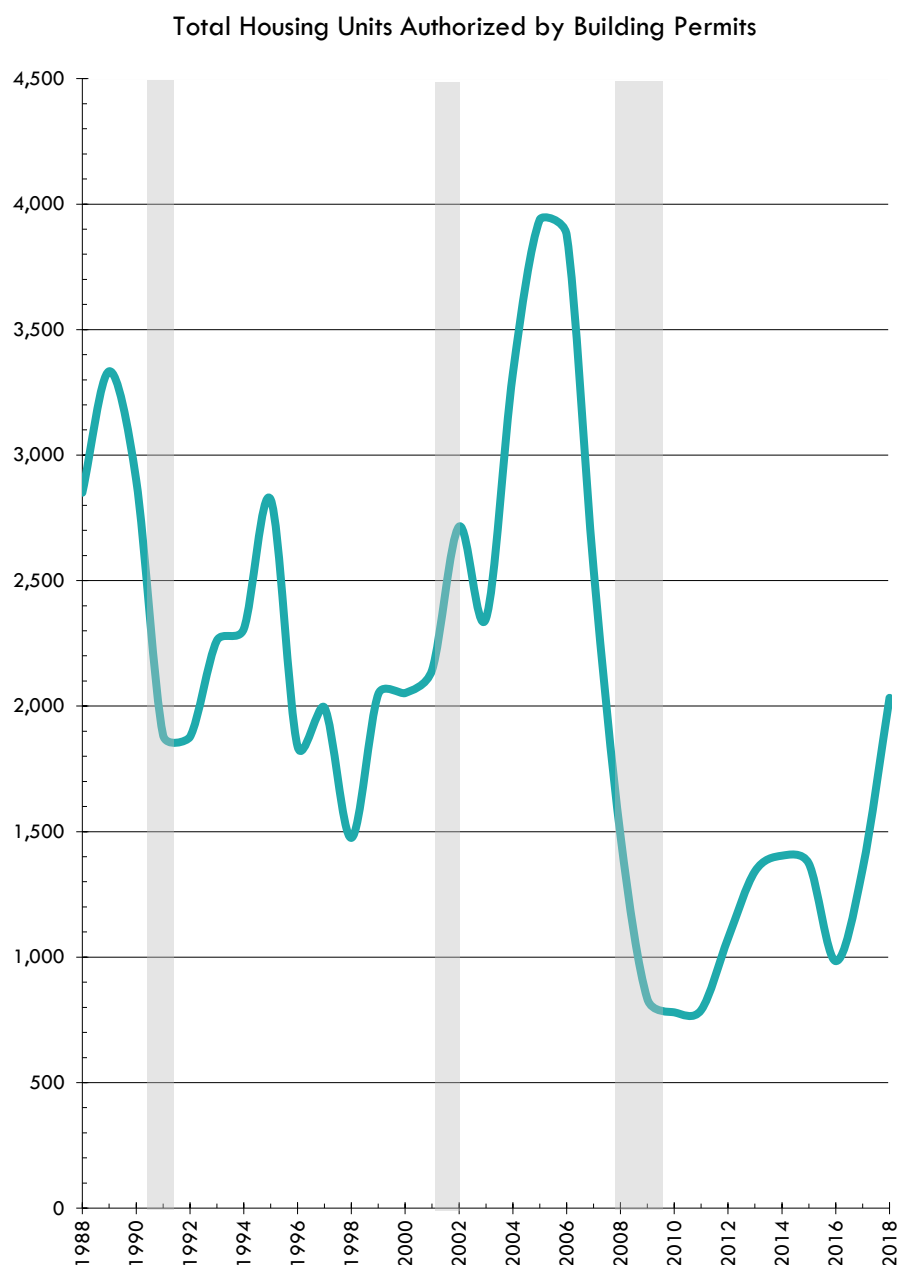
## Residential and Commercial Development

### 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 1,237, or 49% of the average during the 2000s and 58% of the annual average of the 1990s.

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	1,373
2016	984
2017	1,351
2018	2,033



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

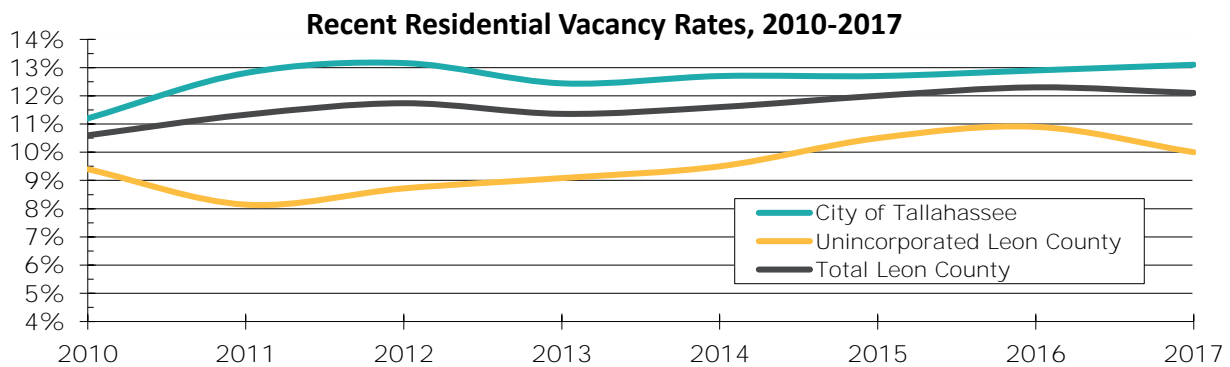
Source: U.S. Bureau of the Census (retrieved by FRED, Federal Reserve Bank of St. Louis).

**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**

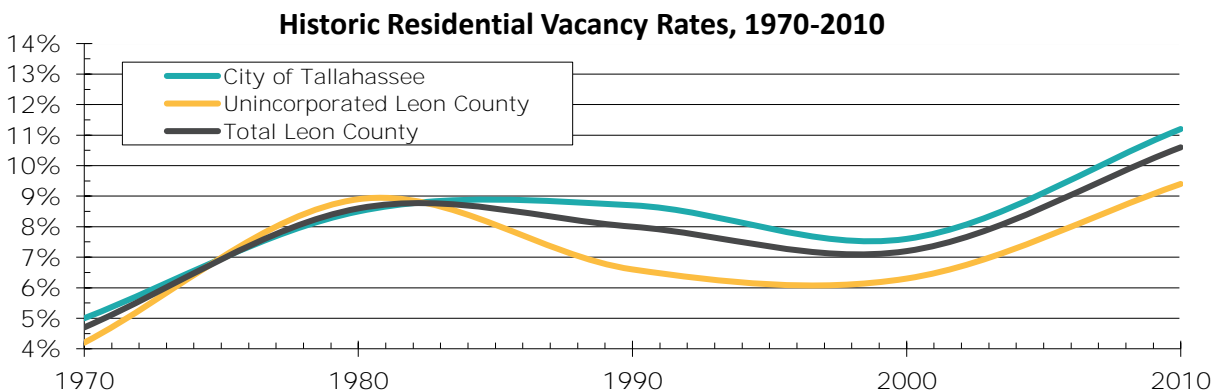
Year	City of Tallahassee	Unincorporated Leon County	Total Leon County
2010	11.2%	9.4%	10.6%
2011	12.8%	8.1%	11.3%
2012	13.2%	8.7%	11.7%
2013	12.4%	9.1%	11.4%
2014	12.7%	9.5%	11.6%
2015	12.7%	10.5%	12.0%
2016	12.9%	10.9%	12.3%
2017	13.1%	10.0%	12.1%



Source: U.S. Department of Commerce, Bureau of the Census, 2010 Decennial Census, 5-Year American Community Survey, 2011 to 2017.

**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 Office, Industrial, and Retail Market Average Lease Rate & Vacancy Rate

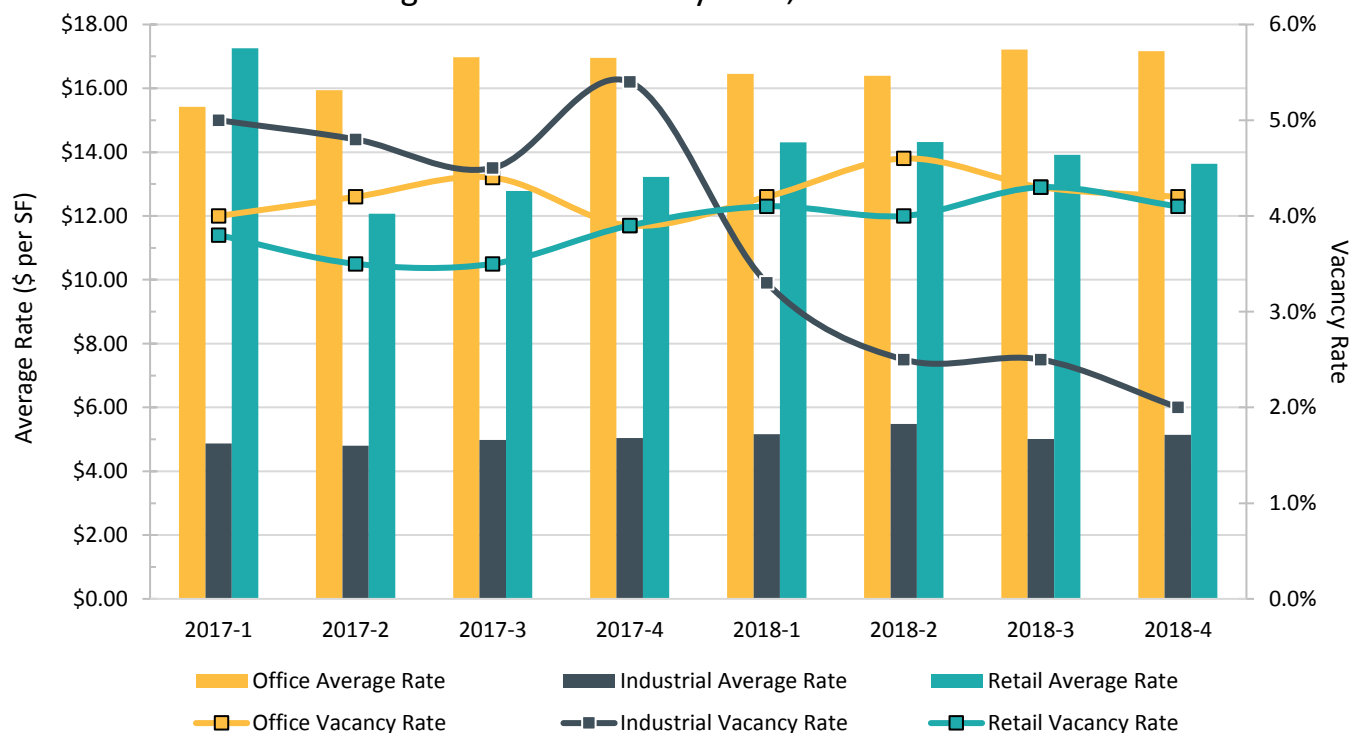
Trend: Since 2017, lease rates for Office uses have averaged \$16.56 per SF, with an average quarterly vacancy rate of 4.2%. Industrial uses lease and vacancy rates averaged \$5.06 and 3.8%, respectively; Retail uses, \$13.94 and 3.9%.

Quarter	Office Average Rate	Office Vacancy Rate	Industrial Average Rate	Industrial Vacancy Rate	Retail Average Rate	Retail Vacancy Rate
2017-1	\$15.42	4.0%	\$4.87	5.0%	\$17.25	3.8%
2017-2	\$15.94	4.2%	\$4.80	4.8%	\$12.07	3.5%
2017-3	\$16.97	4.4%	\$4.98	4.5%	\$12.78	3.5%
2017-4	\$16.95	3.9%	\$5.04	5.4%	\$13.22	3.9%
2018-1	\$16.45	4.2%	\$5.16	3.3%	\$14.31	4.1%
2018-2	\$16.39	4.6%	\$5.48	2.5%	\$14.32	4.0%
2018-3	\$17.21	4.3%	\$5.01	2.5%	\$13.92	4.3%
2018-4	\$17.16	4.2%	\$5.14	2.0%	\$13.63	4.1%

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\*

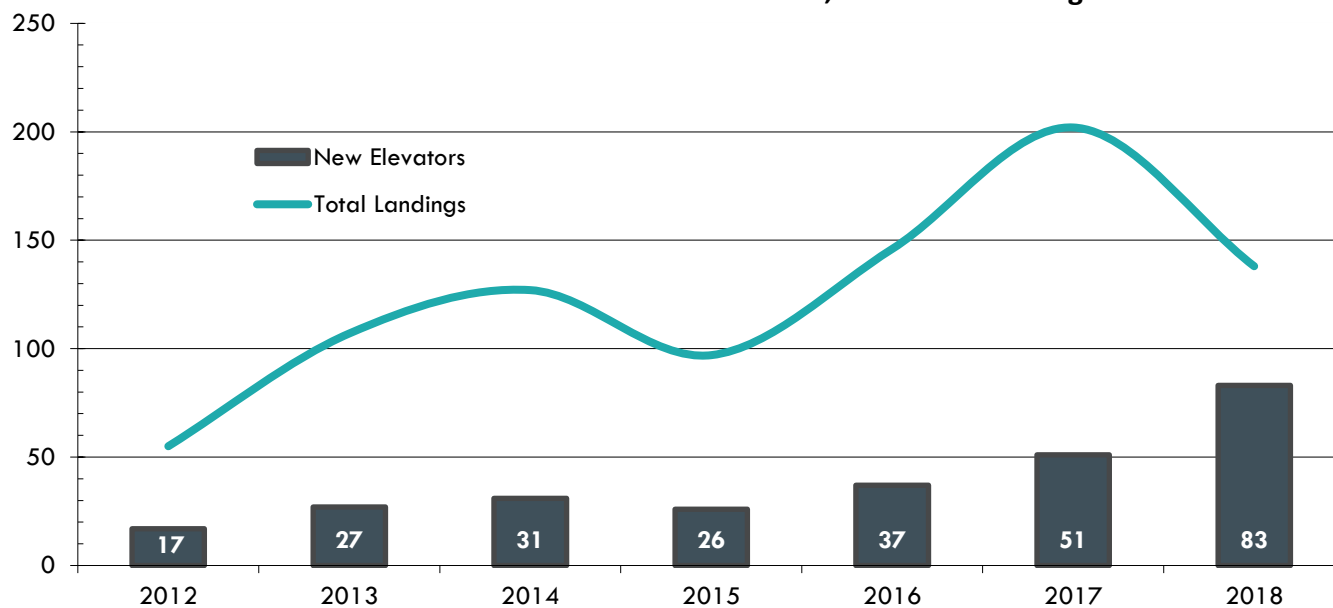
Trend: Measuring how many new elevators have been installed each year helps in the overall assessment of development and redevelopment. It gives a basic approximation for intensity of commercial and institutional development, and also is an indicator of dense residential development.

Item	2012	2013	2014	2015	2016	2017	2018
New Elevators	17	27	31	26	37	51	83
Total Landings	55	107	127	97	146	202	138
<i>Total Landings by Building Type:</i>							
Apartments	2						
Association		2			3		
Church			6				
Commercial	27	10	15	15	36	70	16
Condominium			16	5	6		
Federal Agency	2						
Food Service				3			2
Hospital							5
Hotel				8			
Local Government	2			3			
Medical	10			16	12	67	
Public Lodging					27	55	86
School	2	10		2	4	4	
State Agency							
Student Housing	10	56	12	26			
Student Housing with Retail		25	25	10			
University		4	53	9	58	6	29

\*Includes Initial Installations and Relocations

Source: Florida Department of Business and Professional Regulation

#### New Elevators Installed or Relocated, with Total Landings



**Innovation:**

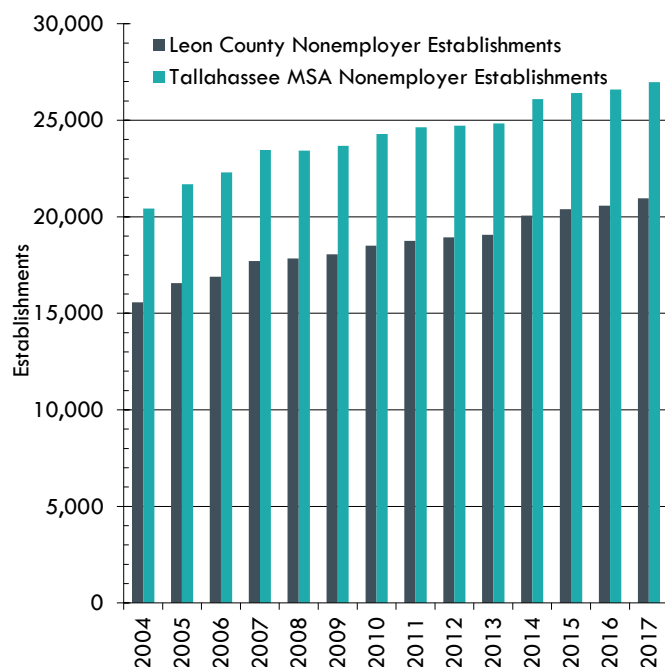
**Nonemployer Statistics**

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.

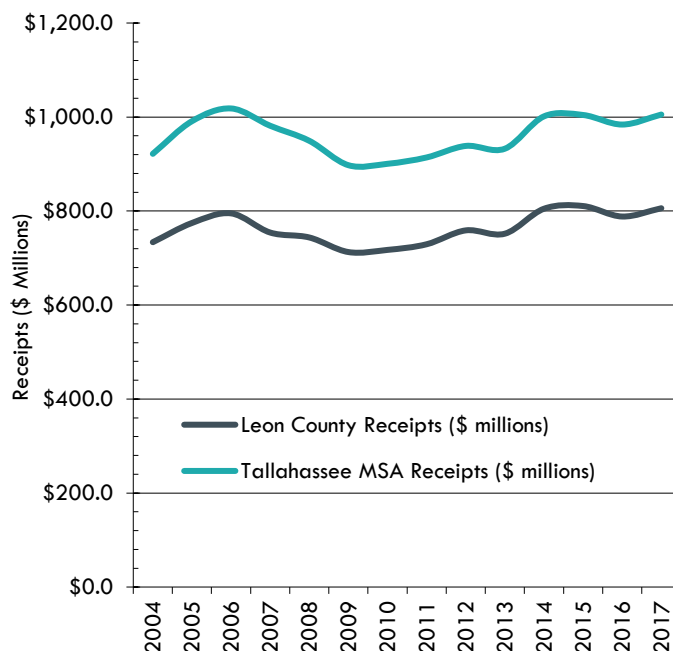
Year	Leon County Nonemployer Establishments	Leon County Receipts (\$ millions)	Tallahassee MSA Nonemployer Establishments	Tallahassee MSA Receipts (\$ millions)
2004	15,575	\$733.7	20,430	\$921.7
2005	16,568	\$774.5	21,683	\$991.1
2006	16,898	\$795.0	22,291	\$1,018.2
2007	17,700	\$754.2	23,452	\$981.4
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
2016	20,580	\$788.3	26,597	\$984.0
2017	20,954	\$805.9	26,981	\$1,005.3

Source: U.S. Census Bureau, Nonemployer Statistics

**Nonemployer Establishments, 2004-2017**



**Nonemployer Receipts, 2004-2017**







## Economic Factors

### Innovation:

#### SBIR/STTR Grants

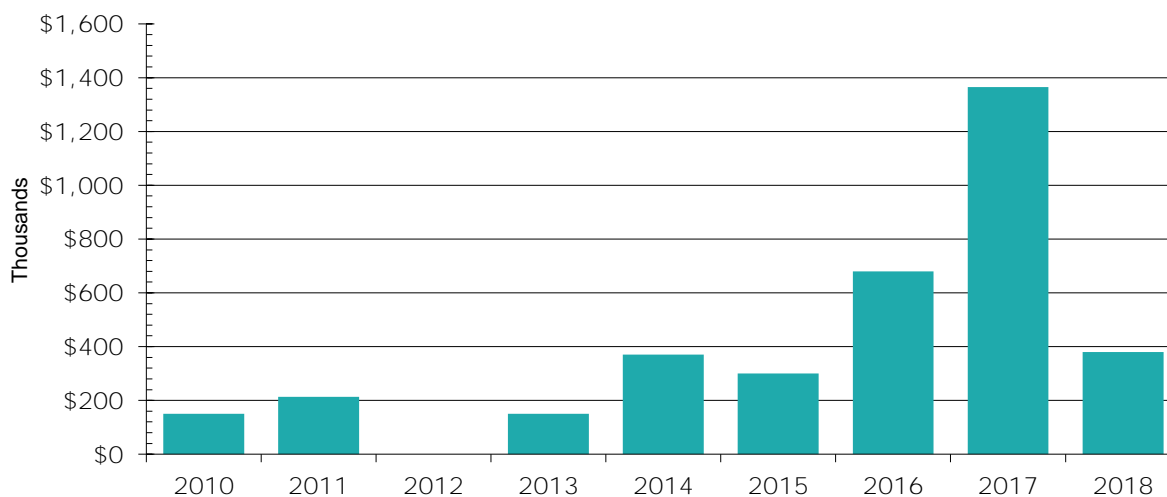
Trend: Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) are federal programs encouraging domestic small businesses to engage in research and development with potential for commercialization. Through competitive awards, SBIR and STTR help small businesses explore their technological potential and give incentive to profit from commercialization. Since 2010, Leon County firms have been awarded over \$3.6 million, with 52% coming from the Department of Energy and almost 40% 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
2018	\$380,000
2010-18	\$3,608,905

Awarding Agency	Percent Awards, 2010-2018
Department of Energy	52.4%
National Science Foundation	39.5%
Department of Health and Human Services	5.9%
Department of Defense	2.2%
Total	100.0%

Source: Small Business Innovation Research

SBIR/STTR Grant Awards, 2010-2018



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

## Economic Factors

### Innovation:

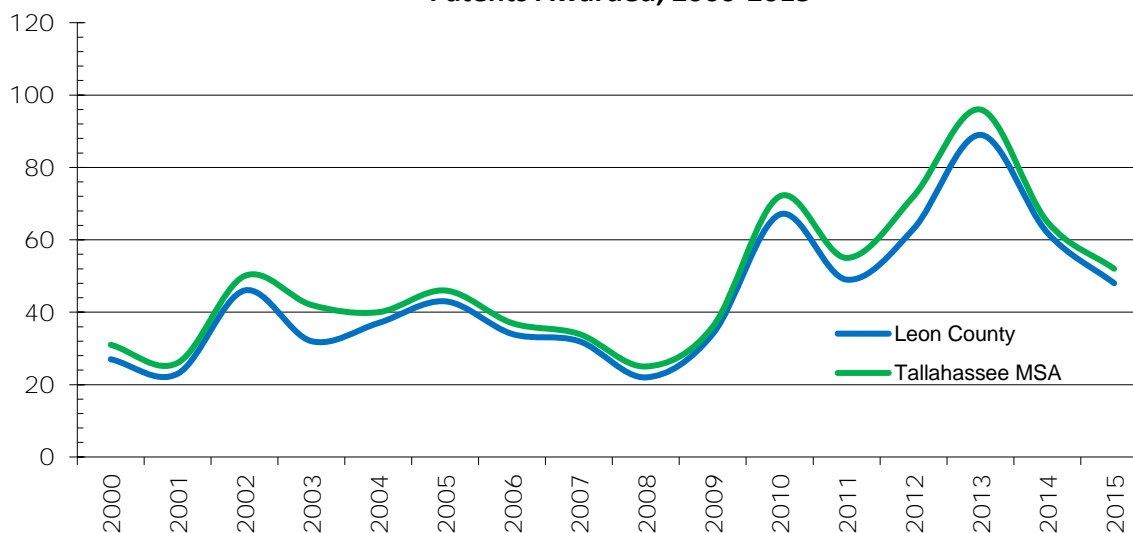
### Patents Awarded Locally

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



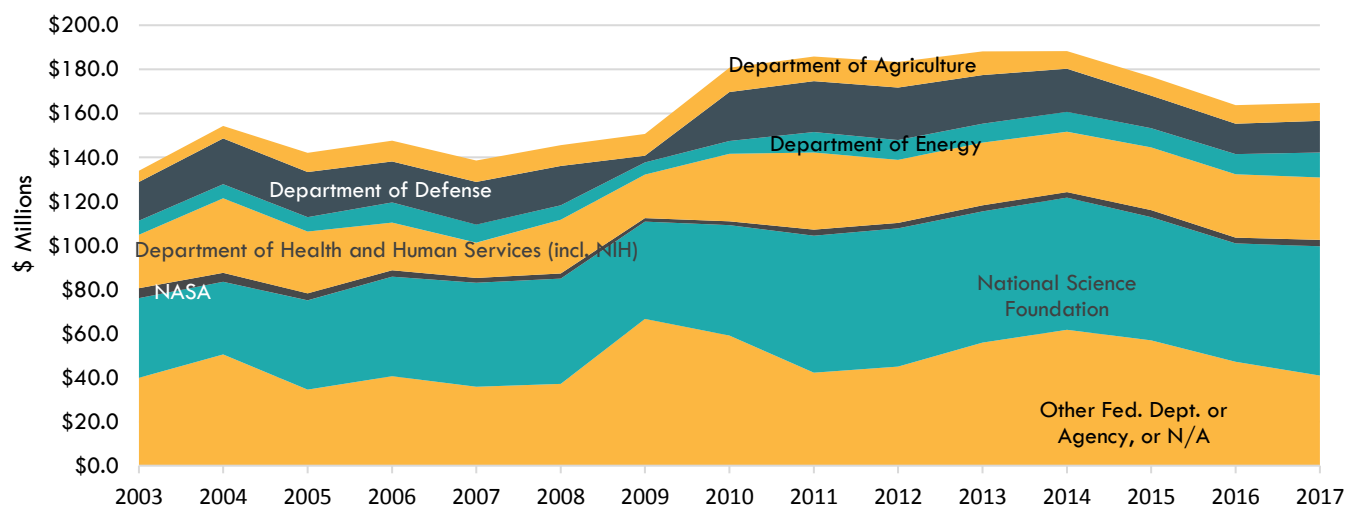
## Federally Financed R&D and Total R&D Expenditures at FSU & FAMU (\$ Millions)

Trend: Between 2003 and 2017, federally financed R&D expenditures at FSU and FAMU in all fields averaged around \$162.9 million per year. R&D expenditures for the National Science Foundation at FSU and FAMU accounted for an average of 31% of the total; Health and Human Services, 16%. During 2003-2017, federally financed R&D accounted for 60% of total R&D expenditures at FSU and FAMU. Total R&D expenditures increased by an average of 2.6% 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
2017	\$8.05	\$14.41	\$11.27	\$28.45	\$2.79	\$58.81	\$40.89	\$164.66	\$320.48

Source: National Science Foundation, Higher Education Research and Development Survey (HERD)

### 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)**

