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DATA DIGEST 2020

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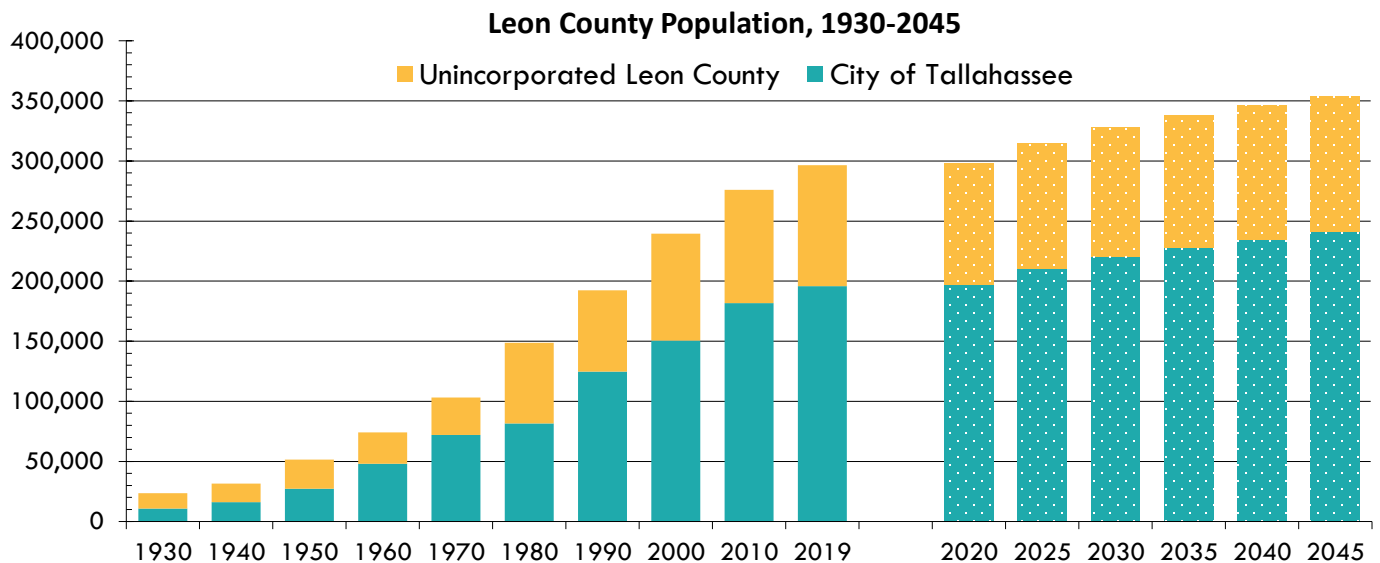
Demographics

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
2019	195,713	100,786	296,499
2020	197,100	101,200	298,300
2025	210,300	104,600	314,900
2030	220,200	107,300	327,500
2035	228,400	109,400	337,800
2040	235,000	111,200	346,200
2045	240,900	112,800	353,700

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 2019 will continue throughout the projected time horizon).



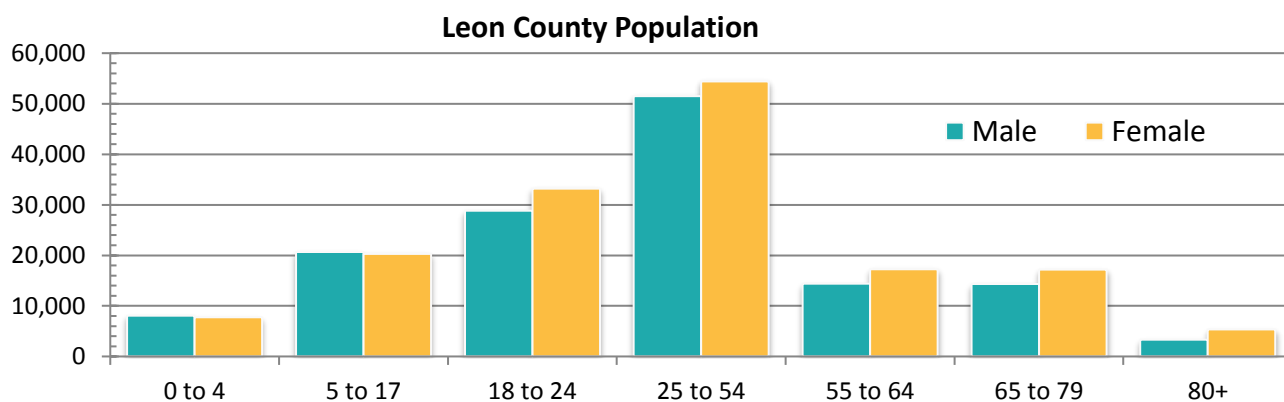


Demographics

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 fifth smallest percentage aged 65 and older at 13.6% (after Orange, Liberty, Union, and Osceola counties) in the State of Florida.

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	15,803	5.3%	7,744	2.6%	8,059	2.7%
5 to 17	40,927	13.8%	20,286	6.8%	20,641	7.0%
18 to 24	62,028	20.9%	33,227	11.2%	28,801	9.7%
25 to 54	105,869	35.7%	54,396	18.3%	51,473	17.4%
55 to 64	31,662	10.7%	17,249	5.8%	14,413	4.9%
65 to 79	31,525	10.6%	17,187	5.8%	14,338	4.8%
80+	8,685	2.9%	5,343	1.8%	3,342	1.1%
Total	296,499	100.0%	155,432	52.4%	141,067	47.6%



Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 187", June 2020

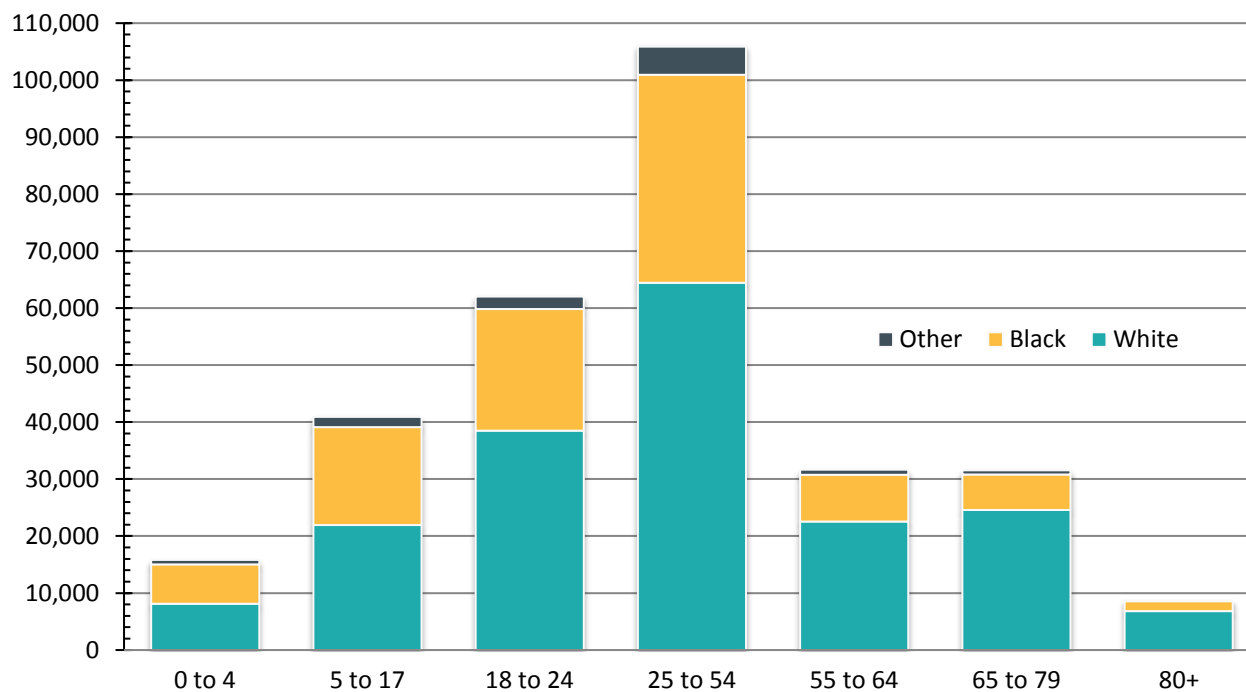
Trend: By race and ethnicity, Leon County's population includes 63.1% White, 33.1% Black, and 3.9% Other Races. Also, 6.5% of Leon County residents are of Hispanic origin.

Age Group	All Races	White	Black	Other	Hispanic Origin*
0 to 4	15,803	8,117	6,926	760	1,128
5 to 17	40,927	21,952	17,140	1,835	3,166
18 to 24	62,028	38,503	21,363	2,162	5,783
25 to 54	105,869	64,444	36,489	4,936	6,629
55 to 64	31,662	22,530	8,205	927	1,287
65 to 79	31,525	24,570	6,257	698	986
80+	8,685	6,850	1,700	135	246
Total	296,499	186,966	98,080	11,453	19,225

*"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 187, June 2020"

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, 53.3% 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 (2010-2019)	21,012	23,115	2,407,257
Net Natural Increase	11,205	12,405	286,383
Births	27,325	36,495	1,970,187
Deaths	16,120	24,090	1,683,804
Net Migration	9,807	10,710	2,120,874
Percent due to Natural Increase	53.3%	53.7%	11.9%
Percent due to Net Migration	46.7%	46.3%	88.1%

Source: University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2019



Demographics

Population:

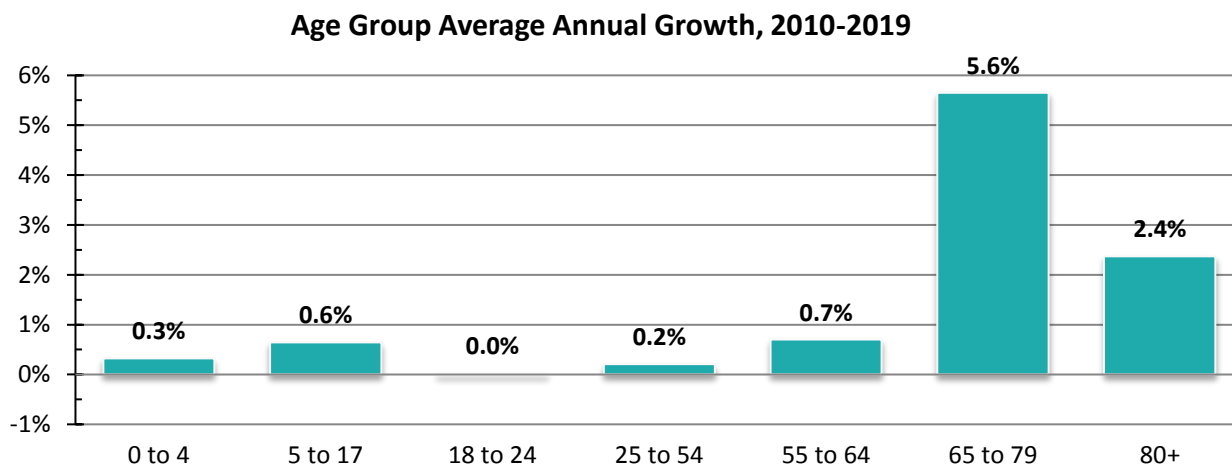
Growth by Age Group

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 2010-2019.

Age Group	2010 Population	2019 Population Estimate	Growth in Population 2010-2019	Percent Growth 2010-2019	Avg. Ann. Growth 2010-2019
0 to 4	15,350	15,803	453	2.9%	0.3%
5 to 17	38,623	40,927	2,304	5.8%	0.6%
18 to 24	61,897	62,028	131	0.2%	0.0%
25 to 54	103,907	105,869	1,962	1.9%	0.2%
55 to 64	29,730	31,662	1,932	6.3%	0.7%
65 to 79	18,962	31,525	12,563	50.8%	5.6%
80+	7,018	8,685	1,667	21.3%	2.4%
Total	275,487	284,443	8,956	3.2%	0.4%

Age Dependency Ratio* 40.9 48.6

*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 187", June 2020



Demographics

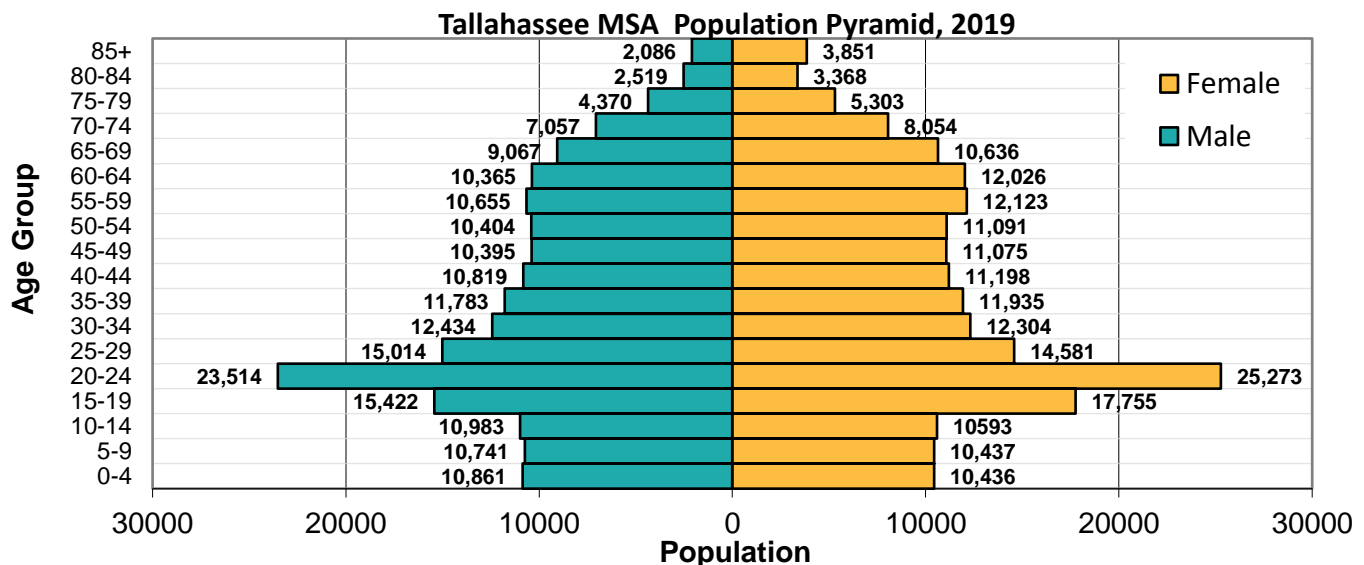
Population:

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 (24 and younger), 37%; and those 65 and older, 14%.

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	21,297	5.5%	10,436	2.7%	10,861	2.8%
5 to 9	21,178	5.4%	10,437	2.7%	10,741	2.8%
10 to 14	21,576	5.5%	10,593	2.7%	10,983	2.8%
15 to 19	33,177	8.5%	17,755	4.5%	15,422	3.9%
20 to 24	48,787	12.5%	25,273	6.5%	23,514	6.0%
25 to 29	29,595	7.6%	14,581	3.7%	15,014	3.8%
30 to 34	24,738	6.3%	12,304	3.2%	12,434	3.2%
35 to 39	23,718	6.1%	11,935	3.1%	11,783	3.0%
40 to 44	22,017	5.6%	11,198	2.9%	10,819	2.8%
45 to 49	21,470	5.5%	11,075	2.8%	10,395	2.7%
50 to 54	21,495	5.5%	11,091	2.8%	10,404	2.7%
55 to 59	22,778	5.8%	12,123	3.1%	10,655	2.7%
60 to 64	22,391	5.7%	12,026	3.1%	10,365	2.7%
65 to 69	19,703	5.0%	10,636	2.7%	9,067	2.3%
70 to 74	15,111	3.9%	8,054	2.1%	7,057	1.8%
75 to 79	9,673	2.5%	5,303	1.4%	4,370	1.1%
80 to 84	5,887	1.5%	3,368	0.9%	2,519	0.6%
85+	5,937	1.5%	3,851	1.0%	2,086	0.5%
Total	390,528	100.0%	202,039	51.7%	188,489	48.3%

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 187", June 2020





Demographics

Population:

Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was 390,528 in 2019, up 6.3% from 2010. The Tallahassee MSA's annual rate of growth in the 2010s has been about 0.7%, compared with 1.4% during the decade of the 2000s.

Metropolitan Area (County or Counties)	2019 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2010-2019	Annual Growth Rate 2010-2019
All Metropolitan Areas	20,518,189	18,119,272	15,357,198	13.2%	1.4%
Miami-Fort Lauderdale-West Palm Beach (Broward, Miami-Dade, Palm Beach)	6,179,631	5,564,657	5,007,988	11.1%	1.2%
Tampa-St. Petersburg-Clearwater (Hernando, Hillsborough, Pasco, Pinellas)	3,138,395	2,783,243	2,396,013	12.8%	1.3%
Orlando-Kissimmee-Sanford (Lake, Orange, Osceola, Seminole)	2,585,614	2,134,411	1,644,563	21.1%	2.2%
Jacksonville (Baker, Clay, Duval, Nassau, St. Johns)	1,553,649	1,345,596	1,122,750	15.5%	1.6%
North Port-Sarasota-Bradenton (Manatee, Sarasota)	813,689	702,281	589,963	15.9%	1.6%
Cape Coral-Fort Myers (Lee)	735,148	618,754	440,888	18.8%	1.9%
Lakeland-Winter Haven (Polk)	690,606	602,095	483,924	14.7%	1.5%
Deltona-Daytona Beach-Ormond Beach (Volusia, Flagler)	649,398	590,289	493,175	10.0%	1.1%
Palm Bay-Melbourne-Titusville (Brevard)	594,469	543,376	476,230	9.4%	1.0%
Pensacola-Ferry Pass-Brent (Escambia, Santa Rosa)	500,188	448,991	412,153	11.4%	1.2%
Port St. Lucie (Martin, St. Lucie)	467,957	424,107	319,426	10.3%	1.1%
Tallahassee (Gadsden, Jefferson, Leon, Wakulla)	390,528	367,413	320,304	6.3%	0.7%
Naples-Immokalee-Marco Island (Collier)	376,706	321,520	251,377	17.2%	1.8%
Ocala (Marion)	360,421	331,303	258,916	8.8%	0.9%
Gainesville (Alachua, Gilchrist)	326,402	305,076	266,842	7.0%	0.8%
Crestview-Fort Walton Beach-Destin (Okaloosa, Walton)	271,585	235,865	211,099	15.1%	1.6%



Demographics

Population:

Metropolitan Area

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Metropolitan Area (County or Counties)	2019 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2010-2019	Annual Growth Rate 2010-2019
Punta Gorda (Charlotte)	181,770	159,978	141,627	13.6%	1.4%
Panama City (Bay)	167,283	168,852	148,217	-0.9%	-0.1%
Sebastian-Vero Beach (Indian River)	154,939	138,028	112,947	12.3%	1.3%
Homosassa Springs (Citrus)	147,744	141,236	118,085	4.6%	0.5%
The Villages (Sumter)	128,633	93,420	53,345	37.7%	3.6%
Sebring (Highlands)	103,434	98,786	87,366	4.7%	0.5%

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, 2019



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, 2019		Census April 1, 2010		Census April 1, 2000	
	Households	Average Household Size	Households	Average Household Size	Households	Average Household Size
Leon County	120,900	2.32	110,945	2.35	96,521	2.34
Florida	8,427,696	2.46	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 185", December 2019;
U.S. Department of Commerce, Bureau of the Census, Census 2010

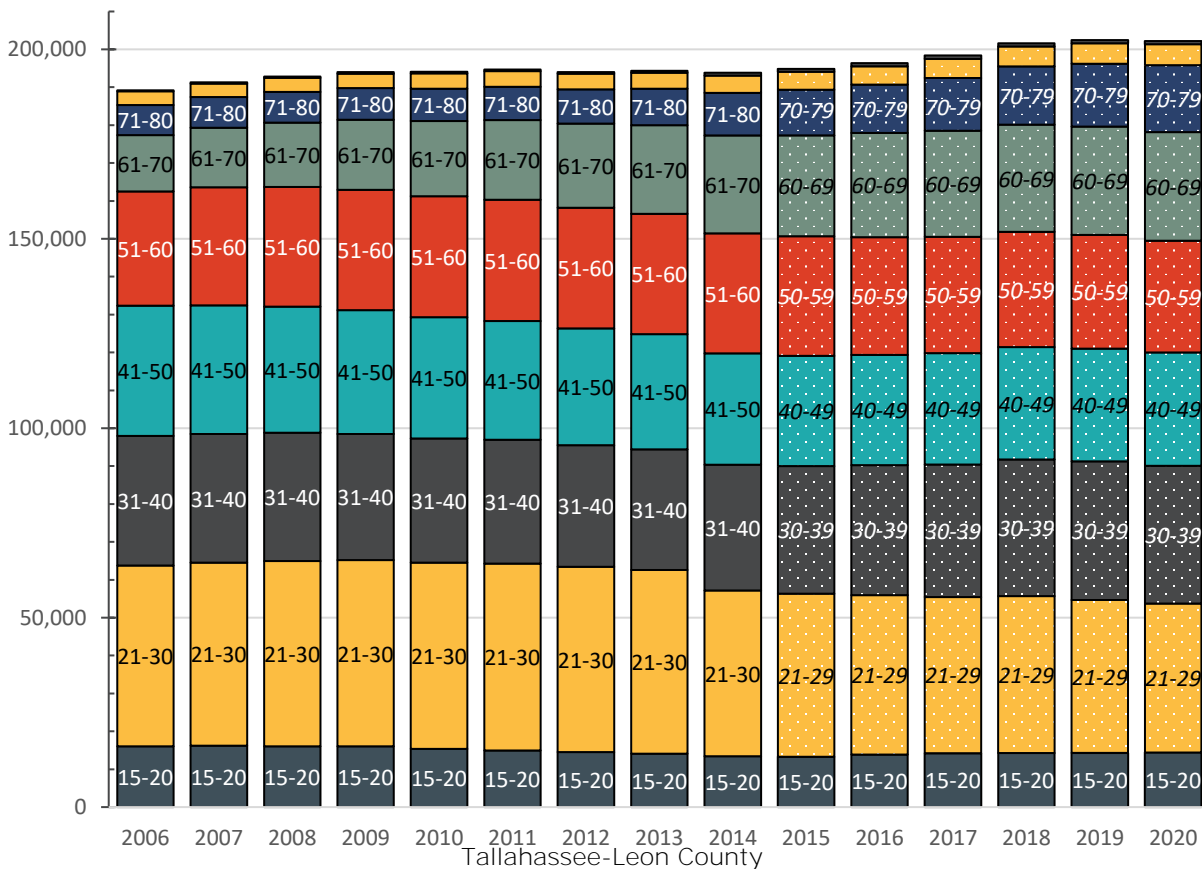
Trend: Between 2010 and 2020, the proportion of drivers licensed in Leon County age 60 or older increased from 17% to 26%, while the proportion age 30 or younger decreased from 33% to 27%.

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
2020	14,408	<i>39,317</i>	<i>36,356</i>	<i>29,924</i>	<i>29,491</i>	<i>28,664</i>	<i>17,671</i>	<i>5,539</i>	<i>840</i>	106,441	95,769

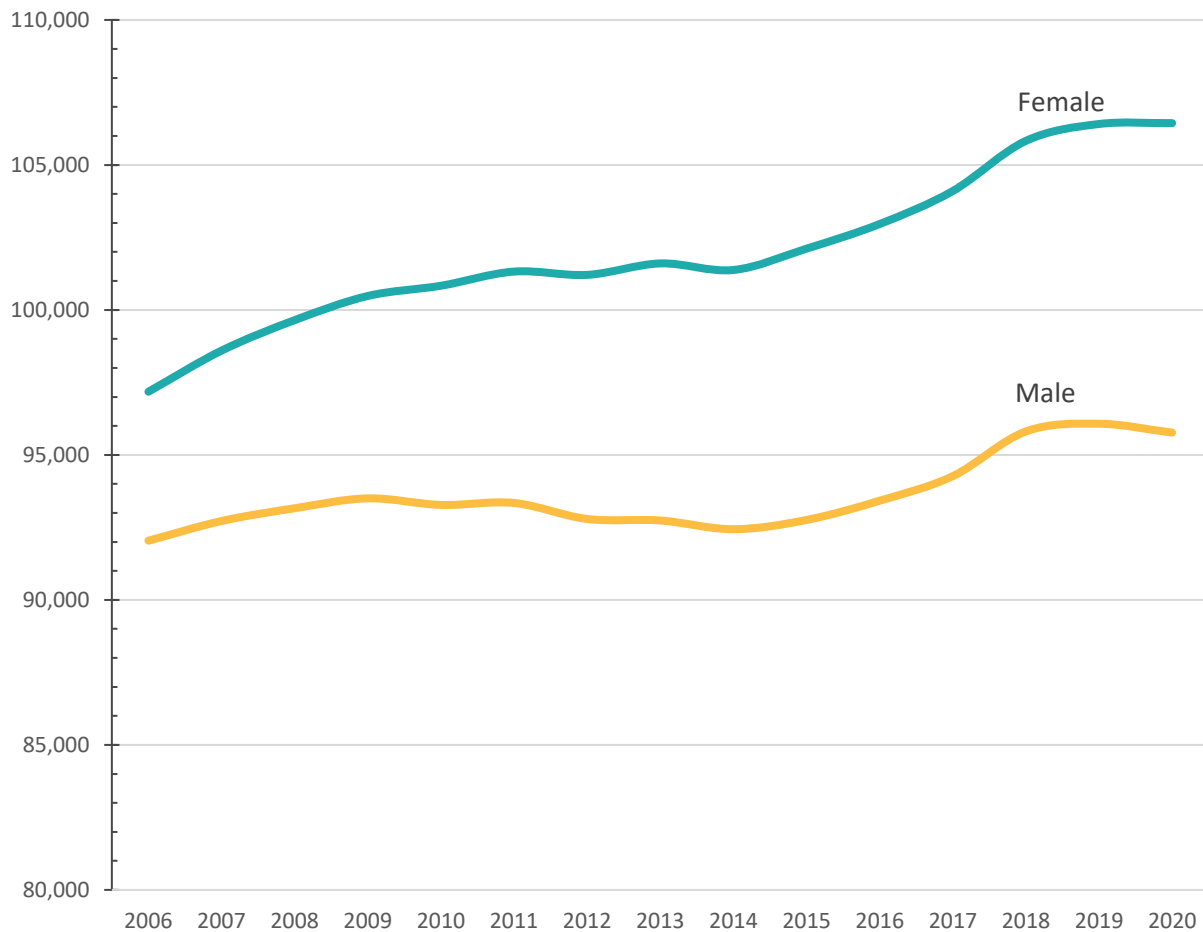
Source: Florida Department of Highway Safety and Motor Vehicles.

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 2018)

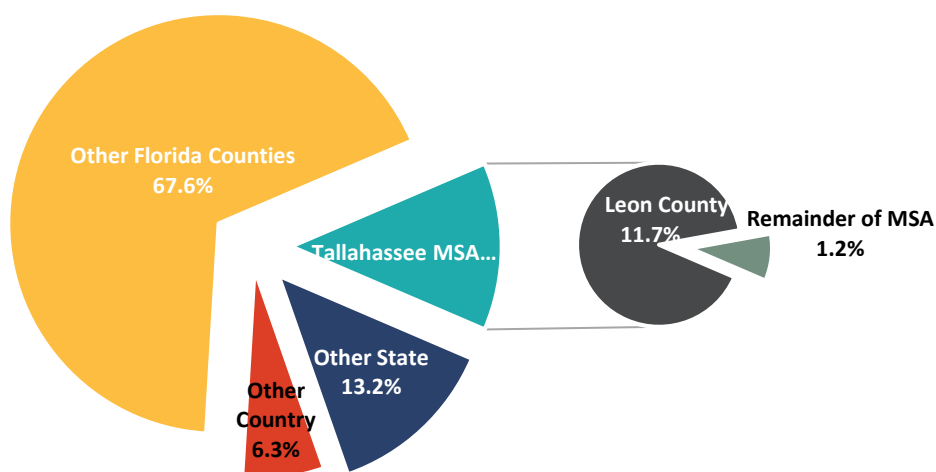
Trend: Over 80% of FSU and FAMU students are Florida residents, with the Tallahassee metro area accounting for about 13%. Broward, Miami-Dade, Palm Beach, Hillsborough, and Orange counties together account for 33% of students.

Place of Origin	Students	Percent of Total
Florida	42,177	80.6%
Tallahassee MSA	6,785	13.0%
Leon County	6,109	11.7%
Remainder of Tallahassee MSA	676	1.2%
Outside Tallahassee MSA	35,392	67.6%
Broward	4,714	9.0%
Miami-Dade	4,052	7.7%
Palm Beach	3,422	6.5%
Hillsborough	2,792	5.3%
Orange	2,578	4.9%
Remainder of Florida Counties	17,834	34.1%
Other State	6,905	13.2%
Georgia	1,444	2.8%
New York	424	0.8%
New Jersey	376	0.7%
North Carolina	373	0.7%
Texas	363	0.7%
Remainder of Other States	3,925	7.5%
Other Country	3,273	6.3%
China	534	1.0%
Panama	354	0.7%
South Korea	173	0.3%
Venezuela	171	0.3%
India	161	0.3%
Remainder of Other Countries	1,880	3.6%

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 2018

Origins of FSU and FAMU Students, Fall 2018



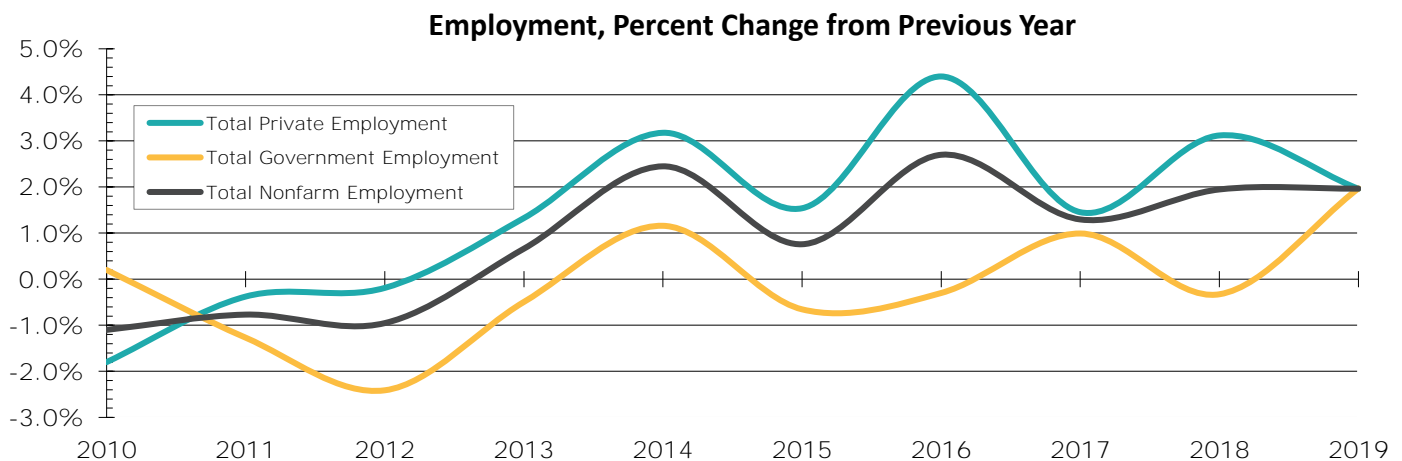
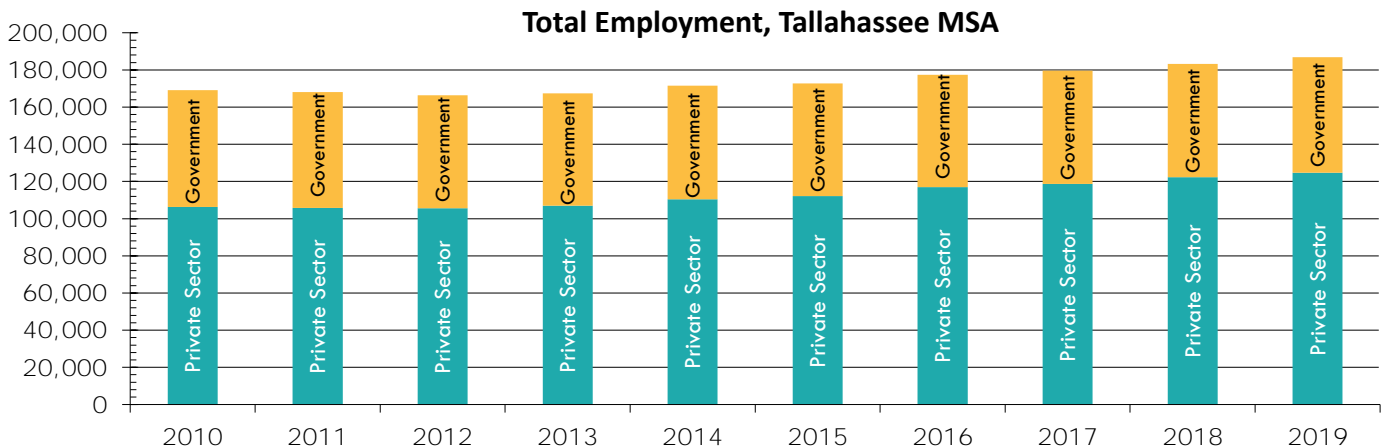


Workforce and Income Employment

Trend: Total non-farm employment growth for the Tallahassee MSA for 2019 was 2%, a net increase of 3,600 jobs. Total private employment was up 2% (gain of 2,400 jobs) in 2019 and government employment was up 2% over the year (1,200 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	1.5%	61,100	1.0%	179,700	1.3%
2018	122,300	3.1%	60,900	-0.3%	183,200	1.9%
2019	124,700	2.0%	62,100	2.0%	186,800	2.0%

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 2019 stood at 3.1% (3.2% for the Tallahassee MSA and 3.1% 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%
2019	3.1%	3.2%	3.1%	3.7%

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

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



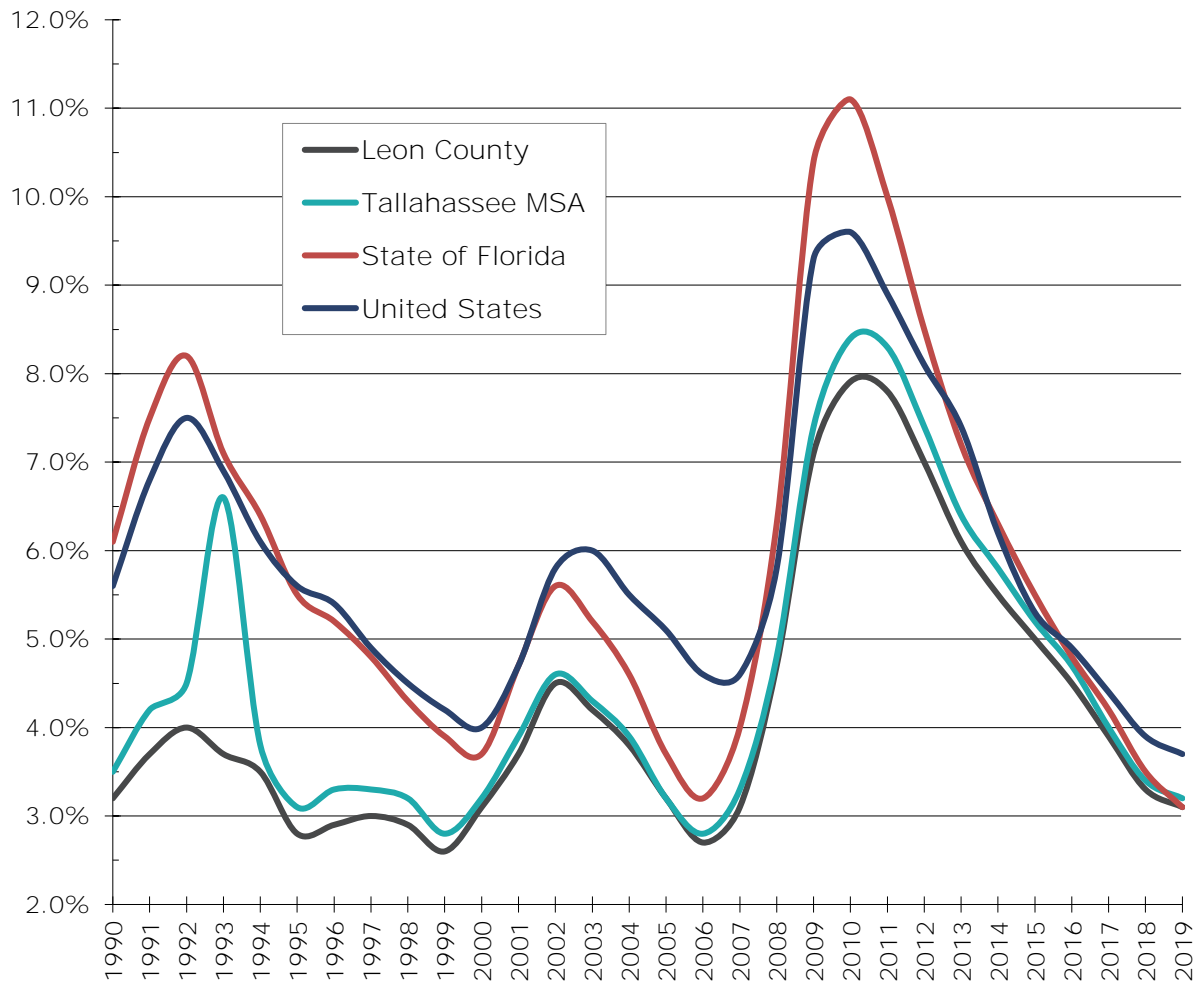
Workforce and Income

Unemployment Rate

Annual Average

Trend: The annual average local unemployment rate has continued to fall since 2010. Leon County's annual average unemployment rate for 2019 stood at 3.1% (3.2% for the Tallahassee MSA and 3.1% for the State of Florida).

Average Annual Unemployment Rate





Workforce and Income

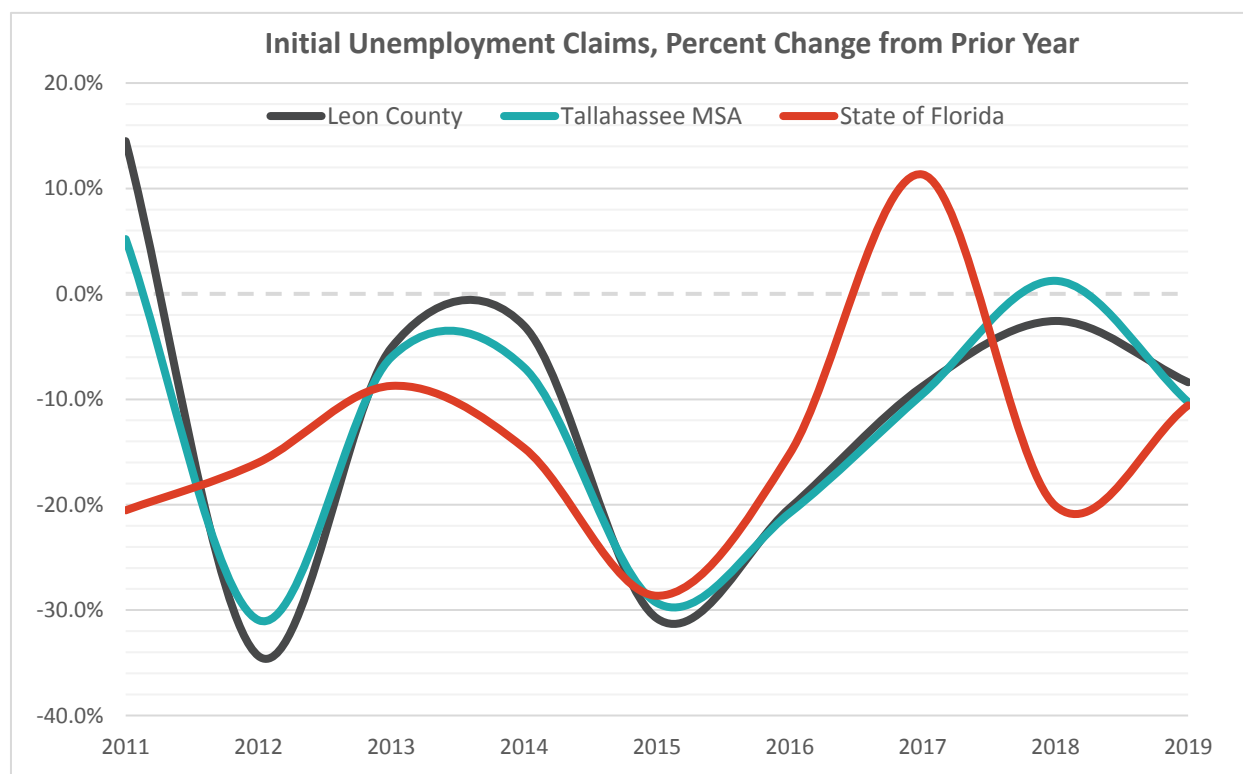
Initial Claims for Unemployment Compensation

Trend: Initial claims for unemployment compensation in Leon County declined for the eighth straight year in 2019.

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%	7,559	-29.3%	424,955	-28.6%
2016	4,520	-20.3%	5,988	-20.8%	360,497	-15.2%
2017	4,123	-8.8%	5,419	-9.5%	401,324	11.3%
2018	4,017	-2.6%	5,486	1.2%	320,652	-20.1%
2019	3,680	-8.4%	4,923	-10.3%	286,735	-10.6%

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

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





Workforce and Income

Average Annual Employment/Wages

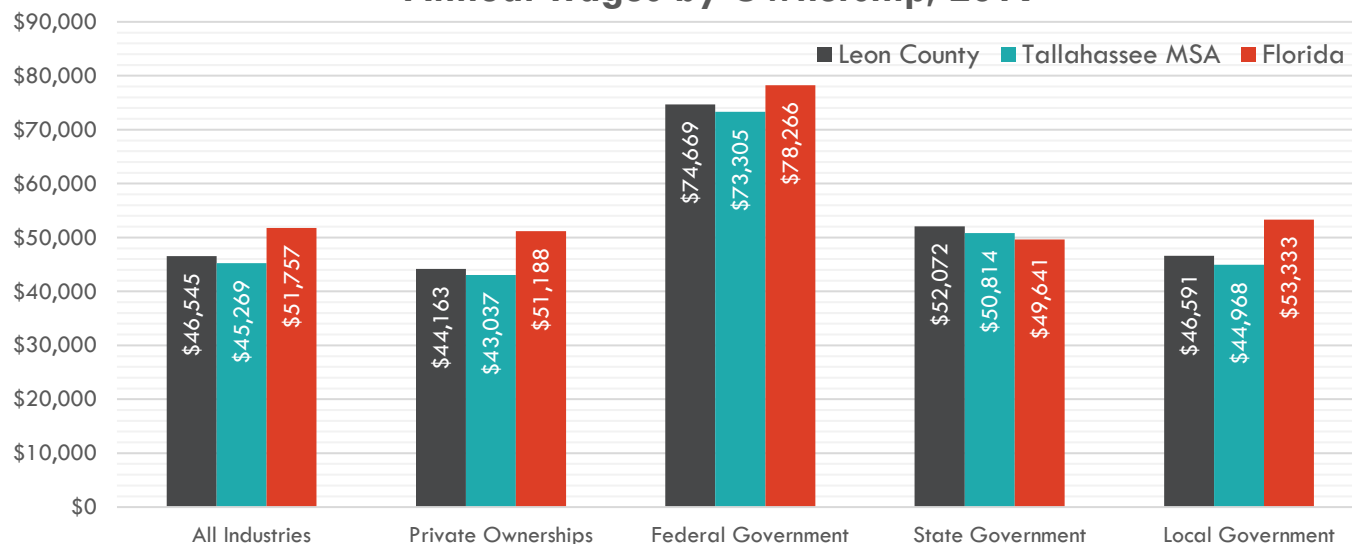
Annual Average Employment and Wages by Ownership

Trend: The average annual wage in Leon County in 2019 was \$45,269, 14% below the state average wage of \$51,757. The annual average state government wage was 4.8% higher in Leon County compared to the state average while the local government wage in Leon County was 12.7% lower than the state's average.

Ownership Type	Annual Establishments	Annual Average Employment	Annual Average Weekly Wage	Annual Wages Per Employee
Leon County				
All Industries	8,997	153,047	\$895	\$46,545
Private Ownerships	8,744	104,236	\$849	\$44,163
Federal Government	46	1,881	\$1,436	\$74,669
State Government	183	35,248	\$1,001	\$52,072
Local Government	24	11,683	\$896	\$46,591
Tallahassee MSA				
All Industries	10,704	176,294	\$871	\$45,269
Private Ownerships	10,341	120,853	\$828	\$43,037
Federal Government	73	2,086	\$1,410	\$73,305
State Government	236	38,891	\$977	\$50,814
Local Government	54	14,465	\$865	\$44,968
Florida				
All Industries	719,278	8,878,468	\$995	\$51,757
Private Ownerships	713,222	7,804,662	\$984	\$51,188
Federal Government	2,033	142,900	\$1,505	\$78,266
State Government	2,436	221,939	\$955	\$49,641
Local Government	1,588	708,967	\$1,026	\$53,333

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

Annual Wages by Ownership, 2019





Workforce and Income

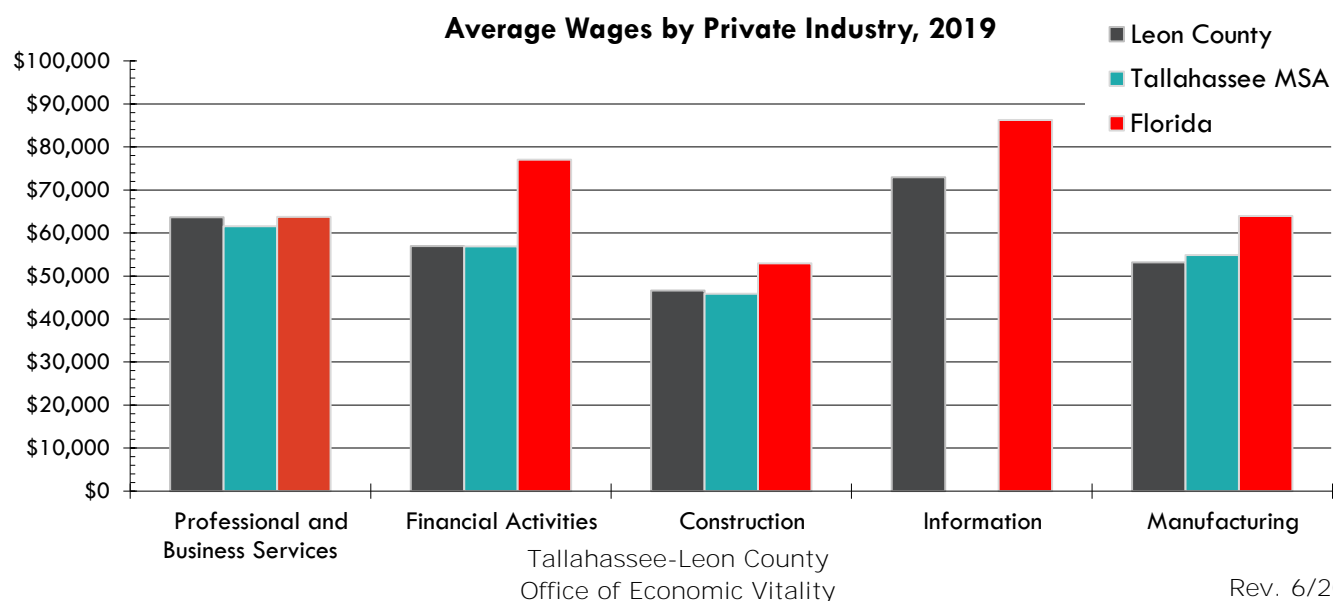
Average Annual Employment/Wages

Average Annual Employment & Wages, Select Private Industries

Trend: The average private sector annual wage in Leon County in 2019 was \$44,163, 15.9% below the state average private wage of \$51,188. By industry type, Leon County's private average annual wage ranged from 35% lower than the state average for the Financial Activities industry sector to <1% lower than the state average for the Professional and Business Services industry sector.

Industry Type	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
Professional and Business Services	2,392	18,617	\$63,653
Financial Activities	941	6,863	\$56,973
Construction	799	6,700	\$46,654
Information	180	2,741	\$72,985
Manufacturing	121	1,903	\$53,196
Tallahassee MSA			
Professional and Business Services	2,609	20,249	\$61,577
Financial Activities	1033	7,332	\$56,849
Construction	1101	8,506	\$45,885
Information	193	2,852	NA
Manufacturing	166	3,313	\$54,859
Florida			
Professional and Business Services	170,717	1,390,391	\$63,751
Financial Activities	76,722	585,842	\$77,014
Construction	74,862	563,761	\$52,933
Information	11,766	138,780	\$86,275
Manufacturing	20,827	383,601	\$63,928

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



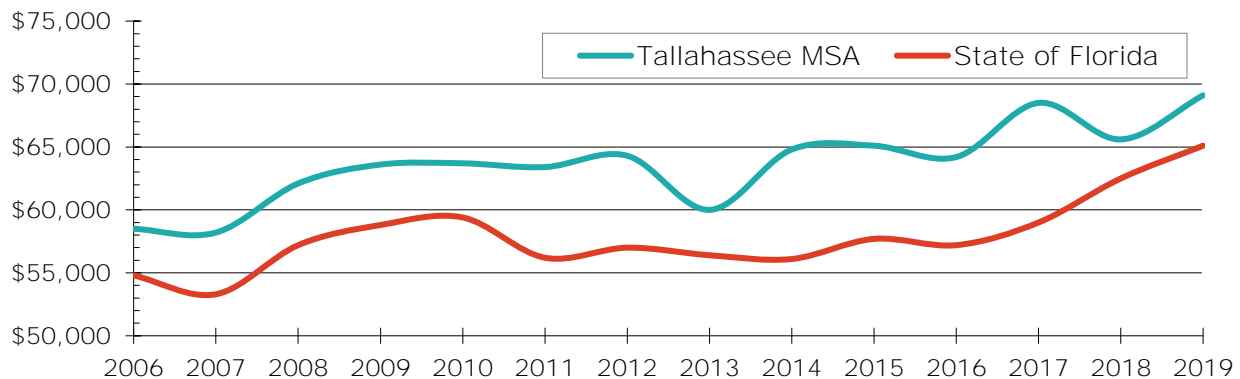
Trend: Median family income for the Tallahassee metro area was \$65,600 in 2018, according to the Federal Financial Institutions Examination Council. The median family income in 2018 in Leon County was \$76,320 according to the Census Bureau's 2014-2018 5-Year American Community Survey.

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
2019	\$69,100	\$65,100	6.0% 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



Median Family Income 2018, by jurisdiction

	2018
Leon County	\$76,322
Tallahassee MSA*	\$70,467
City of Tallahassee	\$67,853
Florida	\$64,312

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

Source: U.S. Census Bureau, 2014-2018 5-Year American Community Survey



Demographics

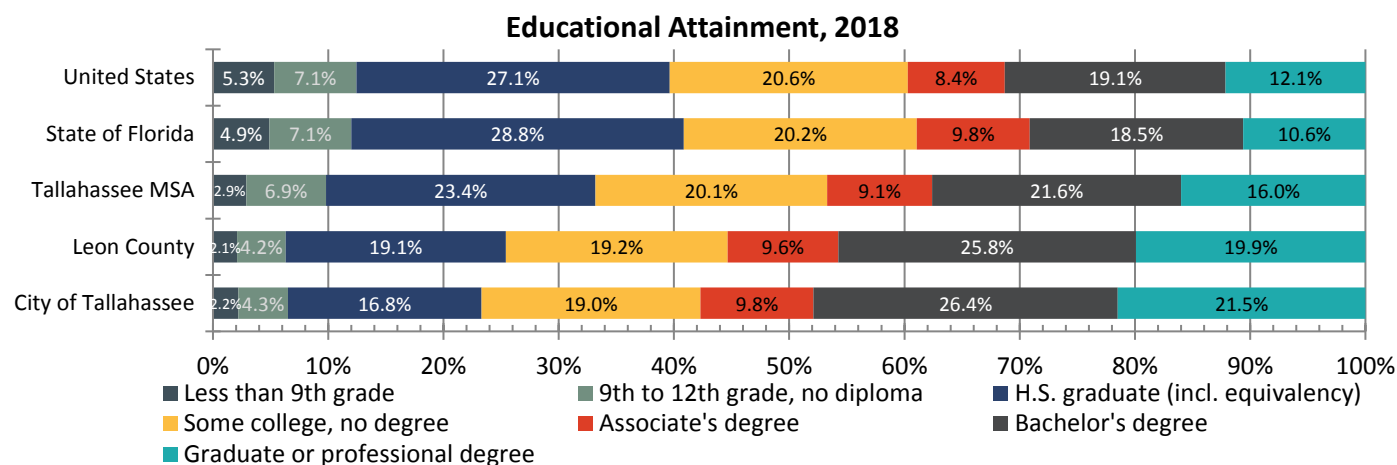
Population:

Educational Attainment

Trend: The level of educational attainment has steadily increased in Leon County. As of 2018, 45.7% of Leon County residents 25 years and over had obtained a Bachelor's degree or higher, up from 41.7% in 2000. In comparison, 28.3% of State of Florida residents and 31.2% 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 2018*	City of Tallahassee	Leon County	Tallahassee MSA	State of Florida	United States
Less than 9th grade	2.2%	2.1%	2.9%	4.9%	5.3%
9th to 12th grade, no diploma	4.3%	4.2%	6.9%	7.1%	7.1%
H.S. graduate (incl. equivalency)	16.8%	19.1%	23.4%	28.8%	27.1%
Some college, no degree	19.0%	19.2%	20.1%	20.2%	20.6%
Associate's degree	9.8%	9.6%	9.1%	9.8%	8.4%
Bachelor's degree	26.4%	25.8%	21.6%	18.5%	19.1%
Graduate or professional degree	21.5%	19.9%	16.0%	10.6%	12.1%

* Population 25 years and older.



Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2014-2018

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, 2014-2019

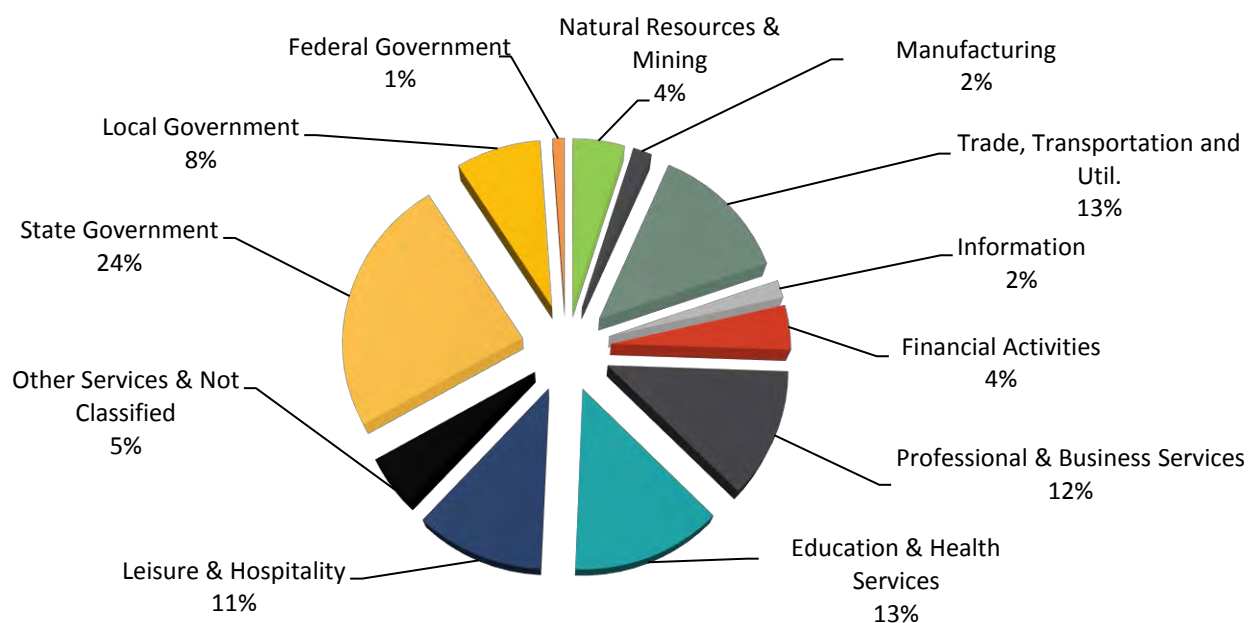
Trend: Private sector job growth in 2019 was led by gains in Professional & Business Services (1,000 jobs), Education & Health Services (600), Leisure & Hospitality (600), and Mining, Logging, and Construction (600).

Industry Type	2014	2015	2016	2017	2018	2019	Avg. Ann. Rate Change 2014-2019
Mining, Logging & Construction	6,300	6,700	7,500	7,700	8,400	9,000	7.1%
Manufacturing	2,900	3,100	3,100	3,200	3,200	3,300	2.6%
Trade, Transportation and Util.	23,700	24,200	24,400	24,300	24,800	24,600	0.7%
Information	3,900	3,500	3,200	3,400	3,100	3,100	-4.6%
Financial Activities	7,100	7,000	7,500	7,800	7,900	7,800	1.9%
Professional & Business Services	19,000	19,000	20,300	20,300	21,400	22,400	3.3%
Education & Health Services	20,600	21,100	21,800	23,200	24,000	24,600	3.5%
Leisure & Hospitality	17,900	18,700	19,600	19,800	20,400	21,000	3.2%
Other Services & Not Classified	9,000	8,900	9,400	8,900	9,600	9,100	0.2%
State Government	43,900	43,500	43,200	44,000	44,800	45,300	0.6%
Local Government	15,200	15,200	15,300	15,000	14,700	14,800	-0.5%
Federal Government	1,900	1,900	2,000	2,100	2,100	2,100	2.0%
Total	171,400	172,800	177,300	179,700	184,400	187,100	1.8%

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 (2019)





Workforce and Income

Projected Employment by Occupation:

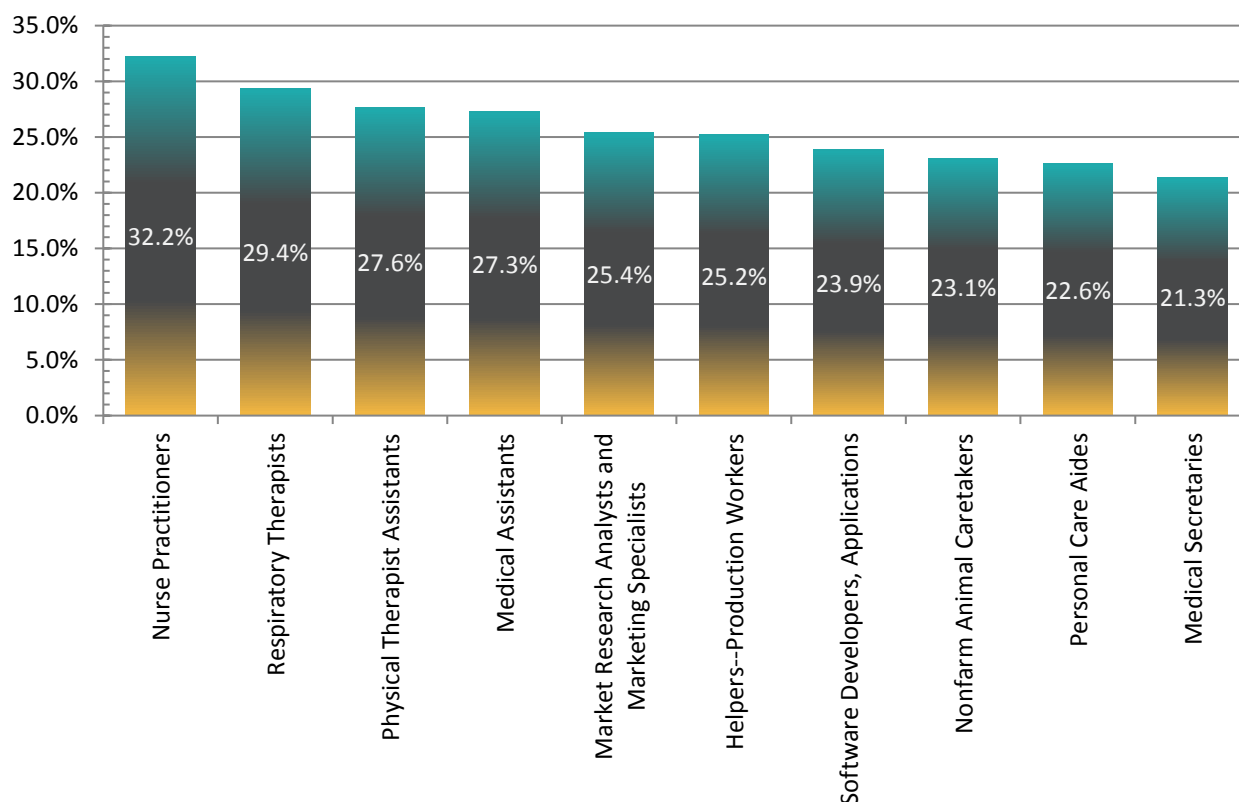
Fastest Growing Occupations in Capital Region (2019-2027)

Trend: The top occupation by projected annual percentage growth in the Capital Region (Gadsden, Leon, and Wakulla counties) is Nurse Practitioners and Respiratory Therapists.

Industry	2019 Emp.	2027 Emp.	Total Emp. Change	Percent Growth
Nurse Practitioners	180	238	58	32.2%
Respiratory Therapists	143	185	42	29.4%
Physical Therapist Assistants	181	231	50	27.6%
Medical Assistants	608	774	166	27.3%
Market Research Analysts and Marketing Specialists	621	779	158	25.4%
Helpers--Production Workers	135	169	34	25.2%
Software Developers, Applications	859	1064	205	23.9%
Nonfarm Animal Caretakers	208	256	48	23.1%
Personal Care Aides	562	689	127	22.6%
Medical Secretaries	417	506	89	21.3%

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

Fastest Growing Occupations, Percent Growth 2019-2027





Workforce and Income

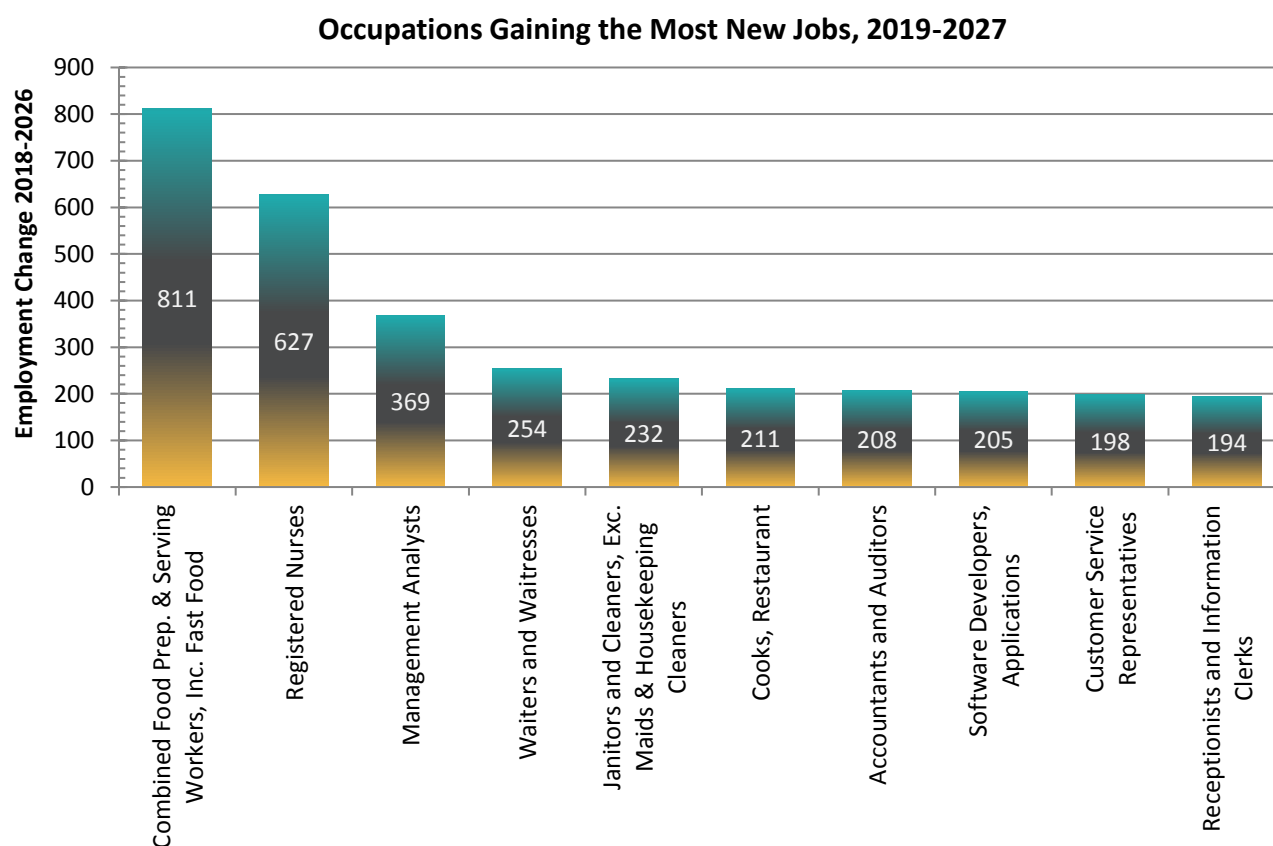
Projected Employment by Occupation:

Occupations Gaining the Most New Jobs (2019-2027)

Trend: By total employment change, Food Prep. & Serving Workers, and Registered Nurses are the occupations projected to add the most jobs in the Capital Region (Gadsden, Leon, and Wakulla counties) by 2027.

Industry	2019 Emp.	2027 Emp.	Total Emp. Change	Percent Growth
Combined Food Prep. & Serving Workers, Inc. Fast Food	5,480	6,291	811	14.8%
Registered Nurses	3,775	4,402	627	16.6%
Management Analysts	6,374	6,743	369	5.8%
Waiters and Waitresses	3,581	3,835	254	7.1%
Janitors and Cleaners, Exc. Maids & Housekeeping Cleaners	3,028	3,260	232	7.7%
Cooks, Restaurant	1,851	2,062	211	11.4%
Accountants and Auditors	3,101	3,309	208	6.7%
Software Developers, Applications	859	1,064	205	23.9%
Customer Service Representatives	3,575	3,773	198	5.5%
Receptionists and Information Clerks	1,581	1,775	194	12.3%

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





Workforce and Income

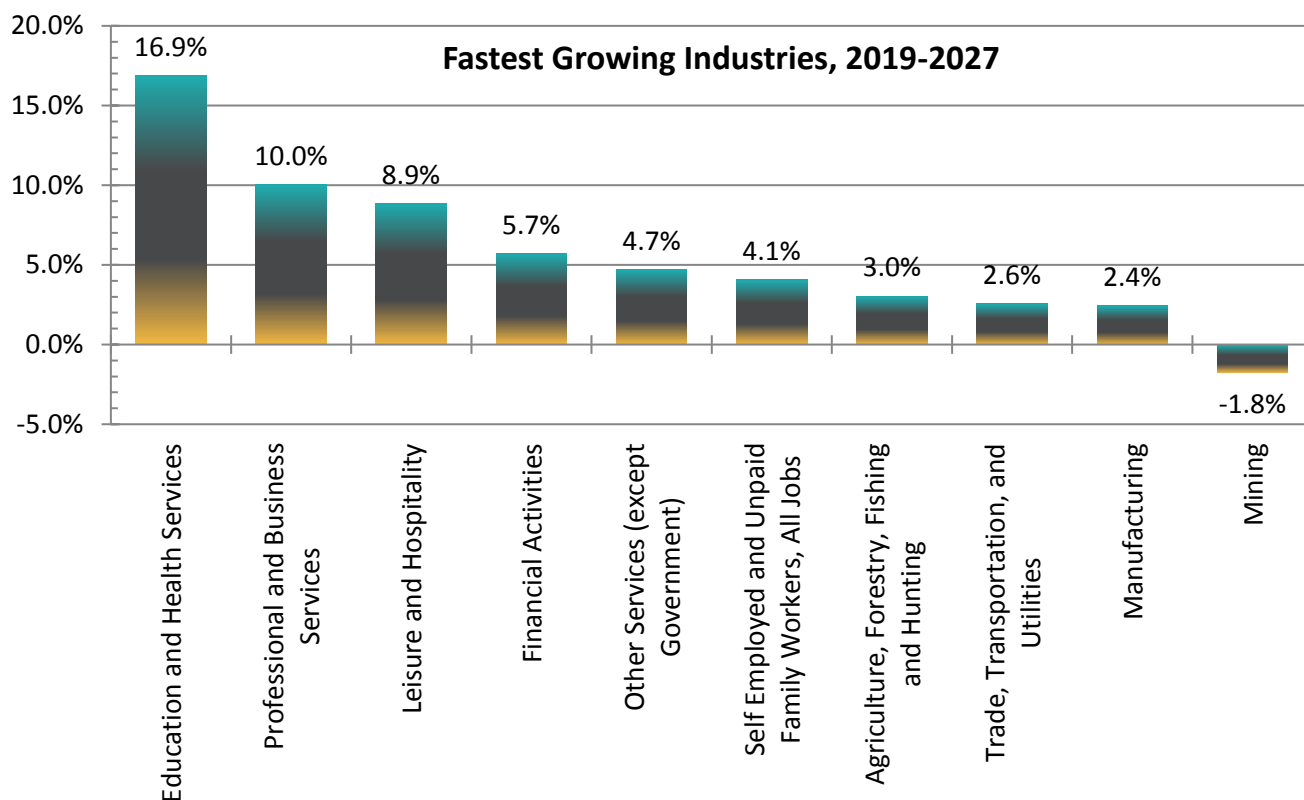
Projected Employment by Industry:

Fastest Growing Industries in Capital Region

Trend: In the Capital Region (Gadsden, Leon, and Wakulla counties), Education and Health Services, Professional and Business Services, and Leisure and Hospitality are projected to create the most jobs while Education and Health Services is expected to experience the largest annual percentage growth in employment by major industry between 2019 and 2027.

Industry	2019 Emp.	2027 Emp.	Total Emp. Change	Percent Growth
Education and Health Services	24,131	28,202	4,071	16.9%
Professional and Business Services	22,675	24,949	2,274	10.0%
Leisure and Hospitality	20,186	21,973	1,787	8.9%
Financial Activities	8,250	8,720	470	5.7%
Other Services (except Government)	7,816	8,185	369	4.7%
Self Employed and Unpaid Family Workers, All Jobs	13,557	14,107	550	4.1%
Agriculture, Forestry, Fishing and Hunting	2,275	2,344	69	3.0%
Trade, Transportation, and Utilities	24,422	25,048	626	2.6%
Manufacturing	3,312	3,393	81	2.4%
Government	61,069	62,241	1,172	1.9%
Construction	8,349	8,497	148	1.8%
Information	2,850	2,845	-5	-1.8%
Mining	170	167	-3	-1.8%
Total All Industries	199,062	210,671	11,609	5.8%

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



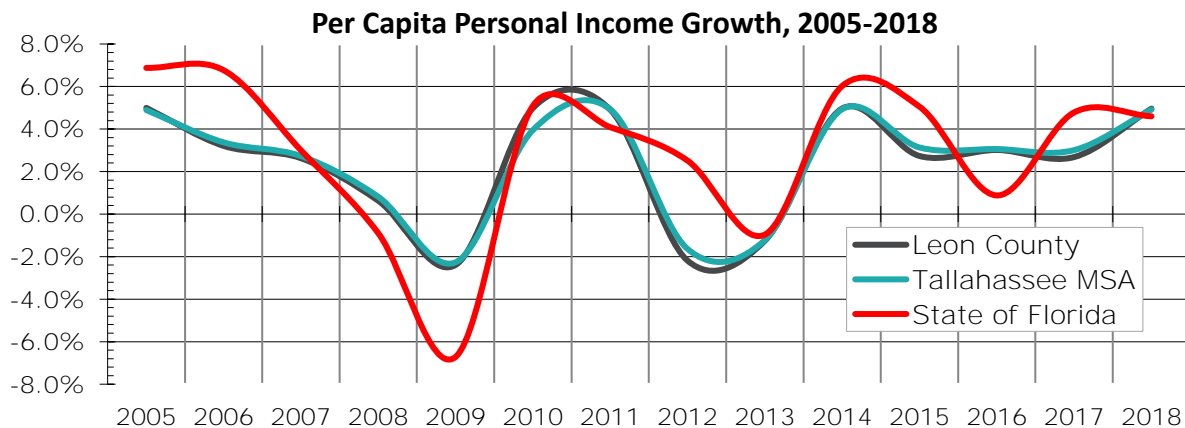
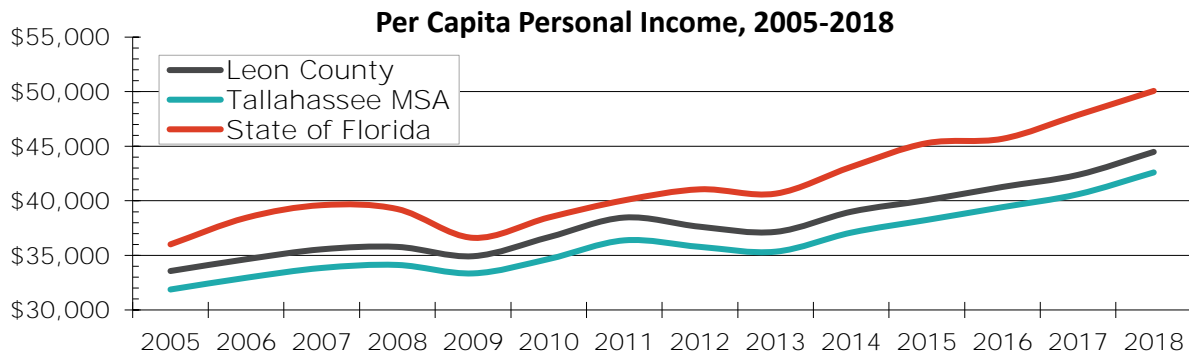
Workforce and Income

Per Capita Personal Income

Trend: Per capita personal income increased 5% in Leon County in 2018 and was 89% 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	\$33,568	5.0%	\$31,874	4.9%	\$36,011	6.9%
2006	\$34,645	3.2%	\$32,949	3.4%	\$38,448	6.8%
2007	\$35,556	2.6%	\$33,848	2.7%	\$39,602	3.0%
2008	\$35,780	0.6%	\$34,124	0.8%	\$39,247	-0.9%
2009	\$34,925	-2.4%	\$33,350	-2.3%	\$36,611	-6.7%
2010	\$36,667	5.0%	\$34,668	4.0%	\$38,474	5.1%
2011	\$38,468	4.9%	\$36,377	4.9%	\$40,047	4.1%
2012	\$37,626	-2.2%	\$35,781	-1.6%	\$41,055	2.5%
2013	\$37,154	-1.3%	\$35,343	-1.2%	\$40,659	-1.0%
2014	\$38,999	5.0%	\$37,087	4.9%	\$43,109	6.0%
2015	\$40,065	2.7%	\$38,249	3.1%	\$45,287	5.1%
2016	\$41,273	3.0%	\$39,419	3.1%	\$45,684	0.9%
2017	\$42,380	2.7%	\$40,605	3.0%	\$47,869	4.8%
2018	\$44,482	5.0%	\$42,601	4.9%	\$50,070	4.6%

Source: U.S. Department of Commerce, Bureau of Economic Analysis, CAINC1 and SAINC1 Personal Income Summary





Workforce and Income

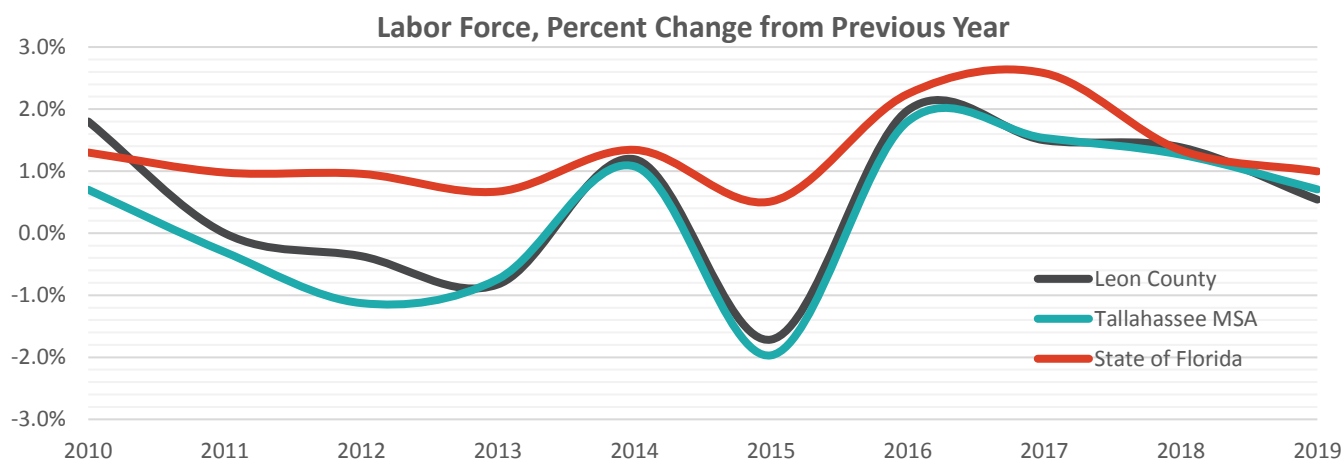
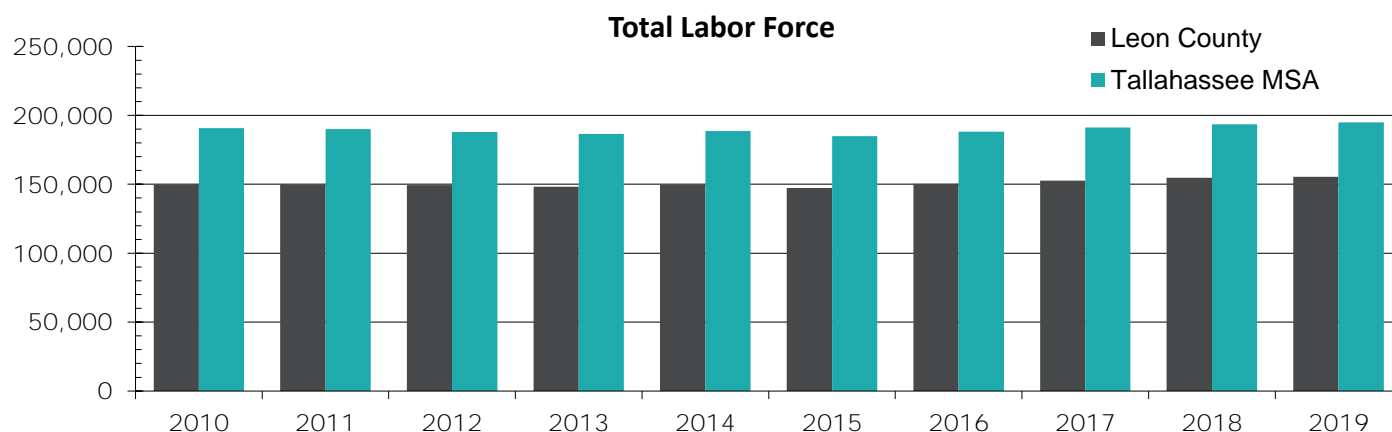
Labor Force

Trend: The Tallahassee MSA's labor force on average grew 0.7% per year during in 2014 to 2019.

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%
2019	155,493	0.5%	194,870	0.7%	10,337,000	1.0%

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

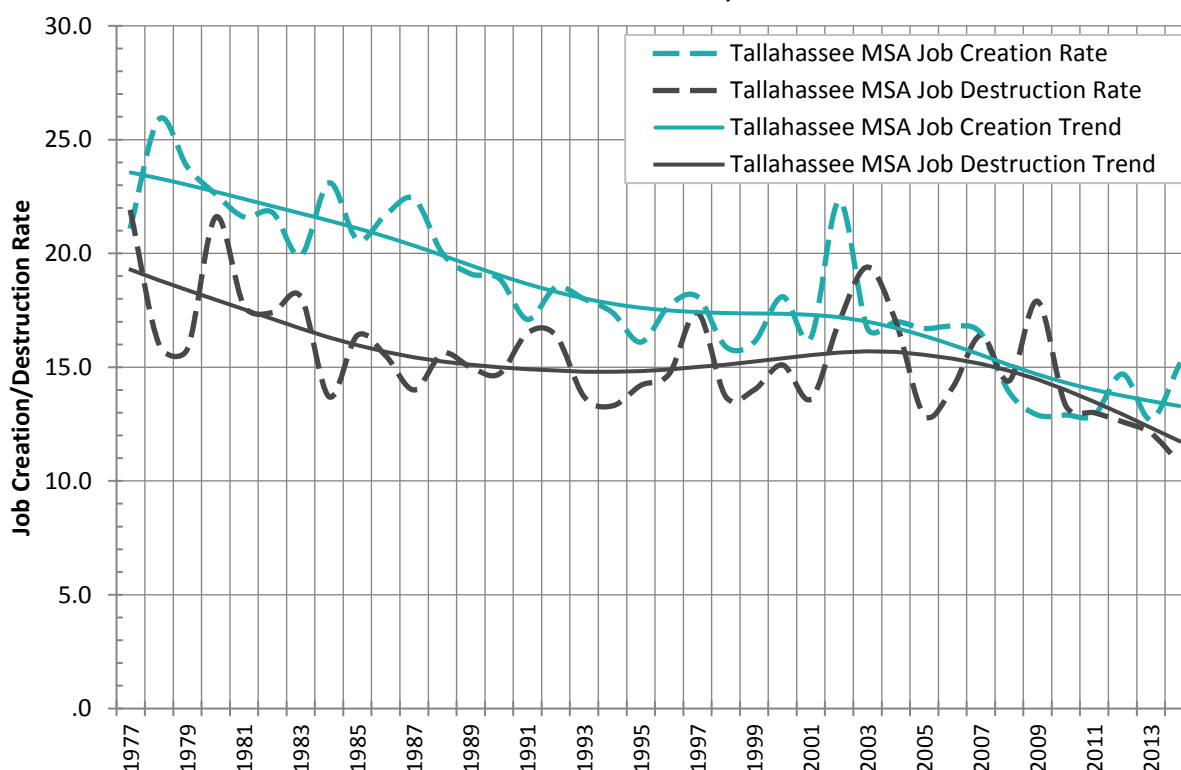
Tallahassee MSA, 1977-2014

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 2019 estimated average hourly wage for all occupations in the Tallahassee MSA was \$22.36, with an average wage of \$28.15 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2019	(2019 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Total All Occupations	174,700	\$22.36	\$17.37	\$10.77	\$28.15
Fast Food and Counter Workers	6,710	\$10.43	\$9.60	\$9.09	\$11.09
Retail Salespersons	5,520	\$13.95	\$11.70	\$9.59	\$16.13
Management Analysts	5,310	\$27.44	\$23.54	\$19.22	\$31.55
Cashiers	4,220	\$10.50	\$10.12	\$9.08	\$11.21
Office Clerks, General	3,620	\$14.96	\$14.04	\$10.30	\$17.28
Secretaries and Admin. Assts., Exc. Legal, Med., Exec.	3,470	\$17.98	\$17.18	\$12.17	\$20.89
Waiters and Waitresses	3,420	\$11.39	\$9.55	\$9.05	\$12.56
Registered Nurses	3,200	\$30.29	\$29.72	\$23.82	\$33.53
Customer Service Representatives	3,070	\$15.42	\$14.54	\$10.66	\$17.80
Teaching Assistants, Postsecondary	2,830	NR	NR	NR	NR
Janitors & Cleaners, Exc. Maids & Housekeeping Cleaners	2,660	\$12.53	\$11.53	\$10.40	\$13.60
First-Line Supervisors of Office & Admin. Support Workers	2,390	\$23.38	\$20.30	\$12.58	\$28.79
Accountants and Auditors	2,260	\$26.00	\$22.20	\$15.66	\$31.17
Lawyers	2,160	\$56.18	\$39.08	\$28.71	\$69.92
Project Mgmt. Specialists & Bus. Op. Specialists, All Other	1,970	\$30.47	\$27.67	\$17.37	\$37.02
Stockers and Order Fillers	1,890	\$12.39	\$11.54	\$10.09	\$13.55
Compliance Officers	1,780	\$19.13	\$17.19	\$13.76	\$21.81
Cooks, Restaurant	1,680	\$12.90	\$12.76	\$10.02	\$14.34
Maintenance and Repair Workers, General	1,680	\$16.36	\$15.52	\$11.82	\$18.64
Receptionists and Information Clerks	1,670	\$12.32	\$11.84	\$9.74	\$13.61
Laborers and Freight, Stock, and Material Movers, Hand	1,610	\$12.86	\$11.78	\$10.38	\$14.10
Construction Laborers	1,600	\$13.21	\$12.77	\$10.06	\$14.78
Nursing Assistants	1,530	\$12.16	\$11.70	\$10.11	\$13.19
Bookkeeping, Accounting, and Auditing Clerks	1,480	\$18.58	\$17.33	\$12.13	\$21.80
Correctional Officers and Jailers	1,460	\$18.12	\$17.34	\$14.93	\$19.71
First-Line Supervisors of Retail Sales Workers	1,430	\$21.03	\$19.70	\$14.49	\$24.30
First-Line Supervisors of Food Prep. and Serving Workers	1,390	\$16.68	\$16.38	\$11.74	\$19.14
Landscaping and Groundskeeping Workers	1,380	\$12.69	\$11.59	\$9.89	\$14.09
Elementary School Teachers, Except Special Education	1,370	\$46,796	\$46,422	\$34,537	\$52,926
Computer User Support Specialists	1,300	\$22.49	\$20.82	\$13.80	\$26.83
Computer Systems Analysts	1,290	\$28.95	\$26.33	\$20.47	\$33.19



Workforce and Income

Occupational Employment and Wages

Occupations with Employment of 1,000+

Trend: The 2019 estimated average hourly wage for all occupations in the Tallahassee MSA was \$22.36, with an average wage of \$28.15 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2019	(2019 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Teaching Assistants, Except Postsecondary	1,250	\$26,402	\$26,012	\$21,964	\$28,620
Light Truck Drivers	1,230	\$17.19	\$15.96	\$11.92	\$19.82
Food Preparation Workers	1,190	\$11.29	\$10.68	\$9.34	\$12.27
Home Health and Personal Care Aides	1,180	\$12.29	\$10.81	\$9.79	\$13.53
Sales Rep. of Services, Exc. Advt., Ins., Fin., Travel	1,150	\$28.46	\$22.96	\$13.67	\$35.85
Licensed Practical and Licensed Vocational Nurses	1,140	\$20.16	\$19.72	\$16.49	\$22.00
Heavy and Tractor-Trailer Truck Drivers	1,070	\$18.11	\$17.72	\$13.38	\$20.48
Software Dev. and Software Qual. Assurance Analysts	1,060	\$41.66	\$39.34	\$26.37	\$49.31
Maids and Housekeeping Cleaners	1,050	\$10.23	\$9.65	\$8.99	\$10.86
Recreation Workers	1,050	\$13.43	\$10.78	\$9.35	\$15.47
Exec. Secretaries and Exec. Admin. Assistants	1,040	\$22.22	\$20.37	\$13.33	\$26.66

* 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

Major Employers

<u>SIZE</u>	<u>EMPLOYER</u>	<u>INDUSTRY</u>
<u>5,000+</u>	Florida State University	Education
	State of Florida	Government
	Tallahassee Memorial Healthcare, Inc.	Healthcare
<u>2,000 - 4,999</u>	City of Tallahassee	Government
	Florida A&M University	Education
	Leon County Schools	Education
<u>1,000 to 1,999</u>	Capital Regional Medical Center	Healthcare
	Leon County	Government
	Tallahassee Community College	Education
	Trulieve	Agriculture
<u>300 to 999</u>	Apalachee Center, Inc.	Healthcare
	Capital City Bank Group	Finance & Insurance
	Capital Health Plan	Healthcare
	Citizens Property Insurance Corporation	Business Services
	Coastal Forest Resources Company	Manufacturing
	Georgia Pacific	Manufacturing
	Goodwill Industries - Big Bend	Social Services
	Mainline Information Systems	Technology
	Sodexo	Food Services
	St. Marks Powder	Manufacturing
	The Florida Bar	Associations & Organizations
	VA Outpatient Clinic	Healthcare
<u>200-299</u>	Cone Distributing	Transportation
	Danfoss Turbocor	Manufacturing
	Envision Credit Union	Finance & Insurance
	General Dynamics Land Systems	Manufacturing
	McKenzie Tank Lines	Transportation
	Preferred Managing Agency	Finance & Insurance
	Radiology Associates	Healthcare
	Residential Elevators	Manufacturing
	Seven Hills Health & Rehabilitation Center	Healthcare
	Tallahassee Orthopedic Clinic	Healthcare
	Tallahassee Primary Care Associates	Healthcare
	Tri-Eagle Sales	Transportation
	Westminster Oaks	Healthcare

<u>100-199</u>	ALSCO	Business Services
	Automated Health Systems	Technology
	Bank of America	Finance & Insurance
	Big Bend Hospice	Healthcare
	Brandt Information Systems	Technology
	Bright Red (The Zimmerman Agency)	Business Services
	Capital Area Community Action Agency	Associations & Organizations
	Centre Point Health and Rehab	Healthcare
	CenturyLink	Telecommunications
	Coca Cola UNITED	Transportation
	Comcast Cable	Telecommunications
	Consulate Health Care	Healthcare
	CSG Systems	Technology
	Culpepper Construction	Construction
	DISC Village	
	FBMC Benefits Management	Business Services
	FedEx Ground	Transportation
	First Commerce Credit Union	Finance & Insurance
	Gadsden Tomato Company	Agriculture
	GT Technologies	Manufacturing
	HealthSouth Rehabilitation Hospital (Encompass)	Healthcare
	Home Instead Senior Care	Healthcare
	Iconic Group	
	Jimmie Crowder Excavating	Construction
	Kaye Scholer LLP	Business Services
	Maclay School	Education
	Marquis Software	Technology
	MCCi	Business Services
	Miracle Hill Nursing and Rehabilitation Center	Healthcare
	Municipal Code Corporation	Business Services
	North Florida Medical Centers	Healthcare
	North Florida Women's Care	Healthcare
	PatLive - Tresta	Technology
	Peavy & Son Construction	Construction
	Pensacola Care, Inc (Tallahassee Developmental Center)	Healthcare
	Select Specialty Hospital	Healthcare
	Syn-Tech Systems	Manufacturing
	Talquin Electric	Utilities
	Tapestry Senior Living	Healthcare
	TeligentEMS	Manufacturing
	T-Formation	Manufacturing
	Thomas Howell Ferguson, P.A. CPAs	Business Services

Data for this list was collected in conjunction with information from Office of Economic Vitality, feedback received from employer surveys, direct employer communication and Chamber database.

If your company information needs updating, please contact Dana Noles at dnoles@talchamber.com.



Economic Factors

Non-profit Organizations:

Annual Income over \$10 Million

Trend: Tallahassee has nearly 50 non-profit organizations whose gross receipts each annually exceed \$10 million, together employing over 12,000.

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)	481	–	12	\$1,009.9
Tallahassee Memorial Healthcare Inc	1979	501(c)(3)	5,866	575	16	\$909.4
Florida Insurance Guaranty Assn Inc	1973	501(c)(6)	28	9	9	\$449.1
Florida Healthy Kids Corp	1992	501(c)(3)	35	13	13	\$347.8
Florida State University Research Fdn	1995	501(c)(3)	0	0	9	\$110.8
Florida State University Fdn Inc	1963	501(c)(3)	128	517	46	\$108.8
Florida Agricultural & Mechanical	1967	501(c)(3)	0	25	29	\$100.0
Big Bend Community Based Care Inc	2002	501(c)(3)	94	0	16	\$98.2
Florida Workers Compensation Insurance Guaranty Assn	1998	501(c)(3)	16	11	11	\$90.5
Florida Tourism Industry Marketing Corps Inc	1996	501(c)(6)	167	35	28	\$90.3
Community Fdn of North Florida Inc	1997	501(c)(3)	4	15	15	\$88.2
Seminole Boosters Inc	1975	501(c)(3)	67	56	60	\$68.8
Florida Coalition Against Domestic Violence Inc	1986	501(c)(3)	83	0	9	\$52.8
School Board of Leon County Florida Voluntary Employee Benefits Trust	1982	501(c)(9)	0	5	5	\$43.4
Twin Oaks Juvenile Development Inc	1999	501(c)(3)	561	185	6	\$42.5
Florida Network of Youth and Family Services Inc	1994	501(c)(3)	14	15	15	\$39.7
Healthy Start Momcare Network Inc	2015	501(c)(3)	13	7	7	\$33.7
The Ounce of Prevention Fund of Florida Inc	1989	501(c)(3)	36	10	10	\$33.4
First Commerce Credit Union	1972	501(c)(14)	195	12	7	\$33.4
Florida Education Assn	1976	501(c)(5)	84	154	15	\$33.1
Florida Assn of Rehabilitation Facilities	2007	501(c)(3)	22	20	18	\$32.0
Envision Credit Union	1970	501(c)(14)	255	12	7	\$31.7
Apalachee Center Inc	1967	501(c)(3)	625	–	13	\$31.1
Goodwill Industries Big Bend Inc	1970	501(c)(3)	1,569	0	21	\$28.2
Florida Assn of Court Clerks	1978	501(c)(6)	126	20	15	\$25.7
Barbara Bush Fdn for Family Literacy Inc	2007	501(c)(3)	22	2,883	12	\$24.5
Early Learning Coalition of the Big Bend Region Inc	2003	501(c)(3)	47	1,075	22	\$24.1
CareerSource Florida Inc	2001	501(c)(3)	35	–	27	\$21.3
Big Bend Hospice Inc	1983	501(c)(3)	276	335	21	\$20.1



Economic Factors

Non-profit Organizations:

Annual Income over \$10 Million

Trend: Tallahassee has nearly 50 non-profit organizations whose gross receipts each annually exceed \$10 million, together employing over 12,000.

Name	Year Tax Exempt Status Granted	Internal Revenue Code Tax Exempt Status	Employees	Volunteers	Voting Board Members	Gross Receipts (\$ millions)
Institute for Intergovernmental Research Inc	1996	501(c)(3)	153	1	7	\$20.0
Tallahassee Memorial Healthcare Fdn	1977	501(c)(3)	0	463	36	\$18.8
Volunteer Florida Foundation Inc	2010	501(c)(3)	0	–	10	\$17.1
Florida State University Credit Union	1970	501(c)(14)	103	12	9	\$17.1
Florida Alcohol & Drug Abuse Assn	1984	501(c)(3)	18	24	7	\$16.0
Fish & Wildlife Fdn of Florida Inc	1995	501(c)(3)	7	0	21	\$15.6
Florida State University International Programs Assn	1994	501(c)(3)	0	0	13	\$15.6
America's Second Harvest of the Big Bend Inc	1989	501(c)(3)	36	1,937	13	\$15.5
Alfred B. Maclay Jr. Day School	1967	501(c)(3)	315	100	18	\$15.3
Florida State University Athletics Assn Inc	2018	501(c)(3)	0	0	3	\$14.9
Florida Chamber of Commerce Inc	1942	501(c)(6)	45	57	58	\$14.8
North Florida Medical Centers Inc	1979	501(c)(3)	186	–	11	\$14.1
Foundation for Excellence in Education Inc	2007	501(c)(3)	68	11	10	\$14.0
Florida Surplus Lines Service Office	1998	501(c)(6)	30	9	9	\$12.7
Tallahassee Community College Fdn Inc	1981	501(c)(3)	0	32	25	\$12.6
FSU Financial Assistance Inc	1985	501(c)(3)	0	4	10	\$12.0
Florida Sheriffs Assn Inc	1984	501(c)(3)	30	10	17	\$11.9
Florida Police Benevolent Assn Inc	1975	501(c)(5)	73	62	179	\$11.5
Florida Assn of Healthy Start Coalitions Inc	1996	501(c)(3)	8	31	31	\$11.5
Children's Forum Inc	1990	501(c)(3)	87	9	9	\$11.4

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. Tax year is for 2018 or 2017.

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

Workforce and Income

Professional Engineers in Tallahassee MSA

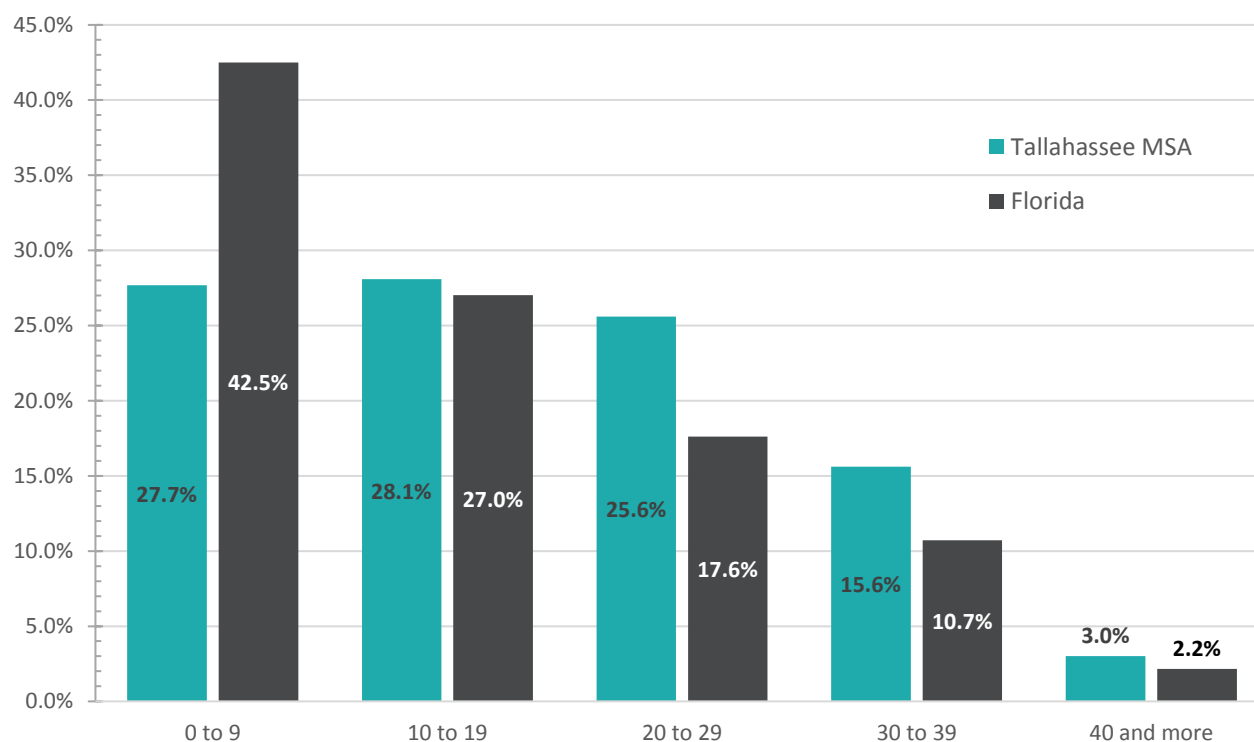
Trend: Professional Engineers (PEs) have an essential role in a community's economic development and redevelopment. Their education, experience, and professional obligations for protecting public health and safety place them in the vanguard of innovation for public infrastructure and private-sector development. 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



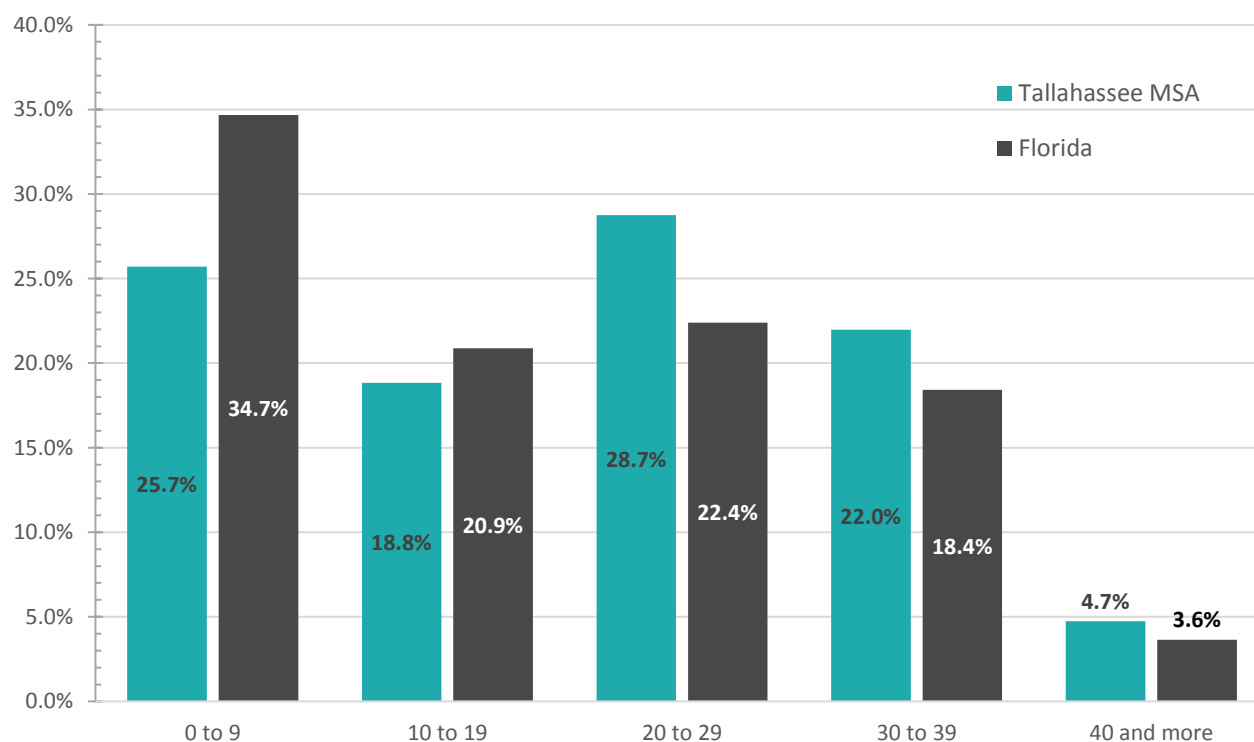
Trend: Certified Public Accountants (CPAs) analyze and plan how money is used by businesses, nonprofit organizations, governments, and individuals. CPAs perform vital functions in economic development by preparing financial statements, evaluating investments, performing cost analyses, and detecting fraud. 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 2018, the Tallahassee Metropolitan Area's (MSA) Real Gross Domestic Product (GDP) was \$16.3 billion, up 2.8% from 2017, trailing Florida's Real GDP growth rate of 3.2% (and 3% for the US), placing the Tallahassee MSA among the top 40% of metro areas nationwide (144th) and 16th among Florida's 22 metro areas.

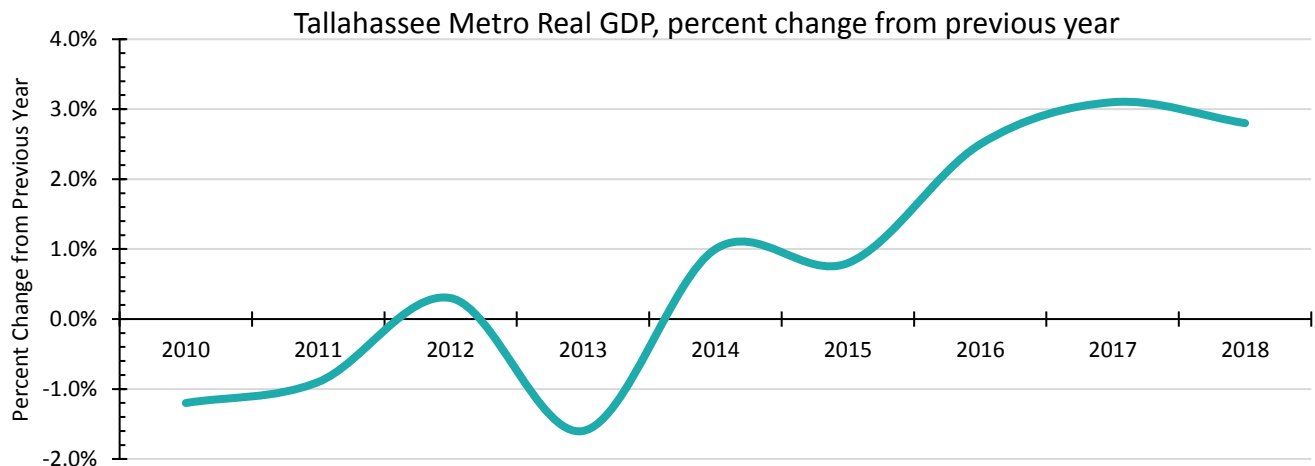
Real GDP (\$ billions, in chained 2012 dollars)

Metro Area	2010	2011	2012	2013	2014	2015	2016	2017	2018
Madison, WI	36.0	37.3	38.6	39.6	41.9	43.6	45.0	45.5	46.5
Greenville, SC	31.9	33.3	33.7	35.2	36.3	37.7	38.7	39.8	41.1
Little Rock, AR	31.5	32.1	32.3	32.9	33.1	33.7	34.2	33.9	34.6
Trenton, NJ	26.6	26.7	28.3	28.0	27.7	27.8	28.2	27.8	28.5
Lansing, MI	20.9	20.6	20.3	20.1	20.5	21.2	21.7	21.8	22.2
Lincoln, NE	14.7	14.9	15.2	15.5	15.7	16.2	16.4	17.0	17.2
Pensacola, FL	16.1	16.2	16.2	16.3	16.3	16.8	17.1	17.4	18.0
Tallahassee, FL	15.0	14.9	15.0	14.7	14.9	15.0	15.4	15.8	16.3
Montgomery, AL	15.4	15.7	15.7	15.7	15.5	15.8	16.1	15.9	16.2
Gainesville, FL	12.1	11.9	12.0	12.0	12.3	12.8	13.2	13.6	13.9
Athens, GA	7.6	7.5	7.7	7.9	8.0	8.2	8.4	8.7	9.0

Percent Change from Previous Year

Metro Area	2010	2011	2012	2013	2014	2015	2016	2017	2018
Madison, WI	3.6%	3.6%	3.5%	2.5%	5.9%	4.0%	3.4%	1.0%	2.3%
Greenville, SC	2.7%	4.4%	1.0%	4.7%	3.1%	3.8%	2.6%	2.9%	3.3%
Little Rock, AR	0.5%	2.0%	0.4%	2.1%	0.4%	2.0%	1.4%	-1.0%	2.1%
Trenton, NJ	1.0%	0.5%	6.0%	-1.2%	-1.2%	0.5%	1.3%	-1.2%	2.3%
Lansing, MI	5.7%	-1.3%	-1.6%	-0.9%	2.0%	3.0%	2.4%	0.6%	2.0%
Lincoln, NE	3.3%	1.8%	2.0%	1.6%	1.6%	2.8%	1.2%	4.1%	1.3%
Pensacola, FL	0.4%	0.8%	0.1%	0.4%	0.3%	2.9%	1.9%	1.9%	3.1%
Tallahassee, FL	-1.2%	-0.9%	0.3%	-1.6%	1.0%	0.8%	2.5%	3.1%	2.8%
Montgomery, AL	2.9%	1.5%	0.4%	-0.4%	-1.1%	2.4%	1.3%	-0.6%	1.7%
Gainesville, FL	-0.9%	-1.8%	0.3%	0.3%	2.4%	4.1%	3.2%	3.2%	2.4%
Athens, GA	0.7%	-0.9%	2.4%	2.0%	1.4%	3.2%	2.3%	3.4%	2.6%

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





Economic Factors

Productivity

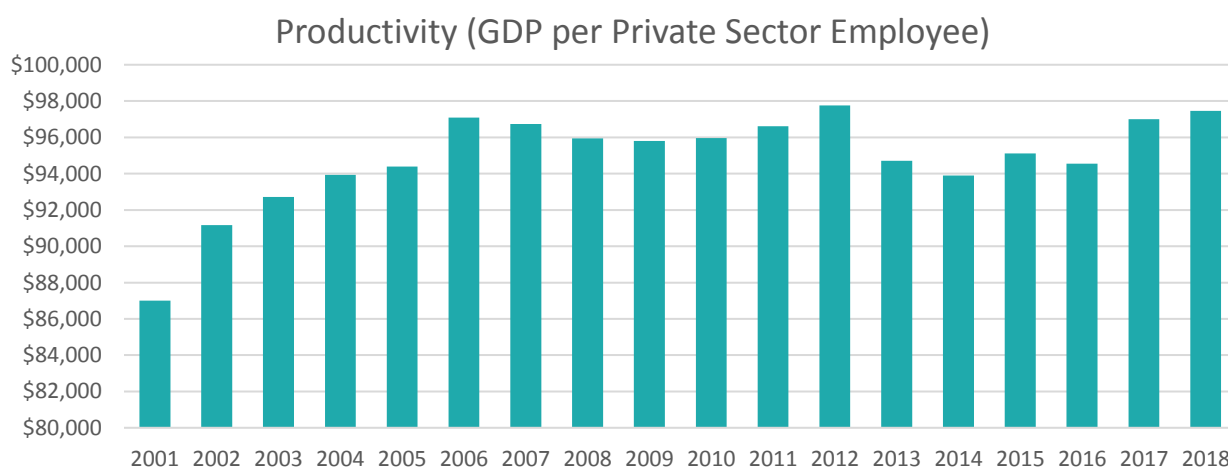
GDP per Private Sector Employee, Tallahassee MSA

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 2012) dollars. Annual changes in productivity for the Tallahassee metro area have fluctuated between a low of -3.2% between 2013 and 2014 to a high of 4.7% from 2001 to 2002.

Year	Private Industries GDP (\$ millions)	Avg. Monthly Private Employment	Productivity (GDP per Private Sector Employee)	Productivity Change from Prior Year
2001	\$8,832	101,500	\$87,011	
2002	\$9,144	100,300	\$91,164	4.7%
2003	\$9,383	101,200	\$92,716	1.7%
2004	\$9,760	103,900	\$93,940	1.3%
2005	\$10,288	109,000	\$94,384	0.5%
2006	\$10,942	112,700	\$97,089	2.8%
2007	\$11,009	113,800	\$96,736	-0.4%
2008	\$10,821	112,800	\$95,934	-0.8%
2009	\$10,366	108,200	\$95,804	-0.1%
2010	\$10,190	106,200	\$95,953	0.2%
2011	\$10,221	105,800	\$96,605	0.7%
2012	\$10,323	105,600	\$97,756	1.2%
2013	\$10,134	107,000	\$94,714	-3.2%
2014	\$10,366	110,400	\$93,891	-0.9%
2015	\$10,662	112,100	\$95,112	1.3%
2016	\$11,081	117,200	\$94,547	-0.6%
2017	\$11,533	118,900	\$96,995	2.6%
2018	\$11,968	122,800	\$97,463	0.5%

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 2012 dollars.





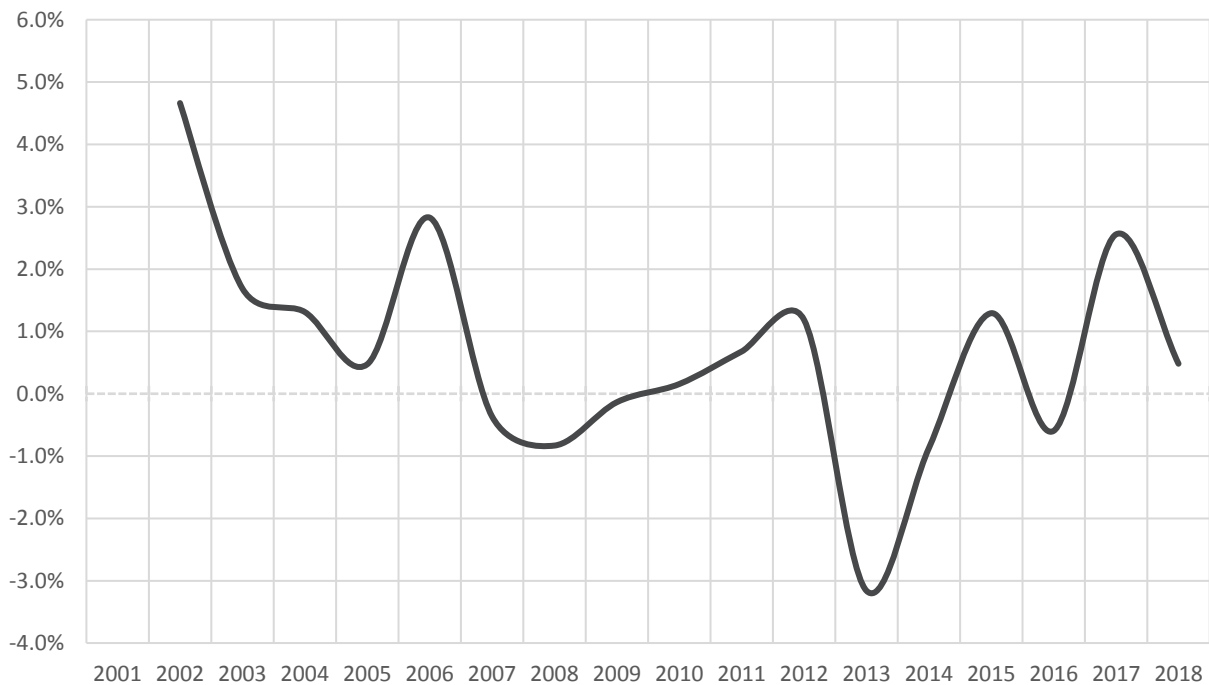
Economic Factors

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 2012) dollars. Annual changes in productivity for the Tallahassee metro area have fluctuated between a low of -3.2% between 2013 and 2014 to a high of 4.7% from 2001 to 2002.

Productivity Change from Prior Year





Economic Factors

Exports from Tallahassee MSA

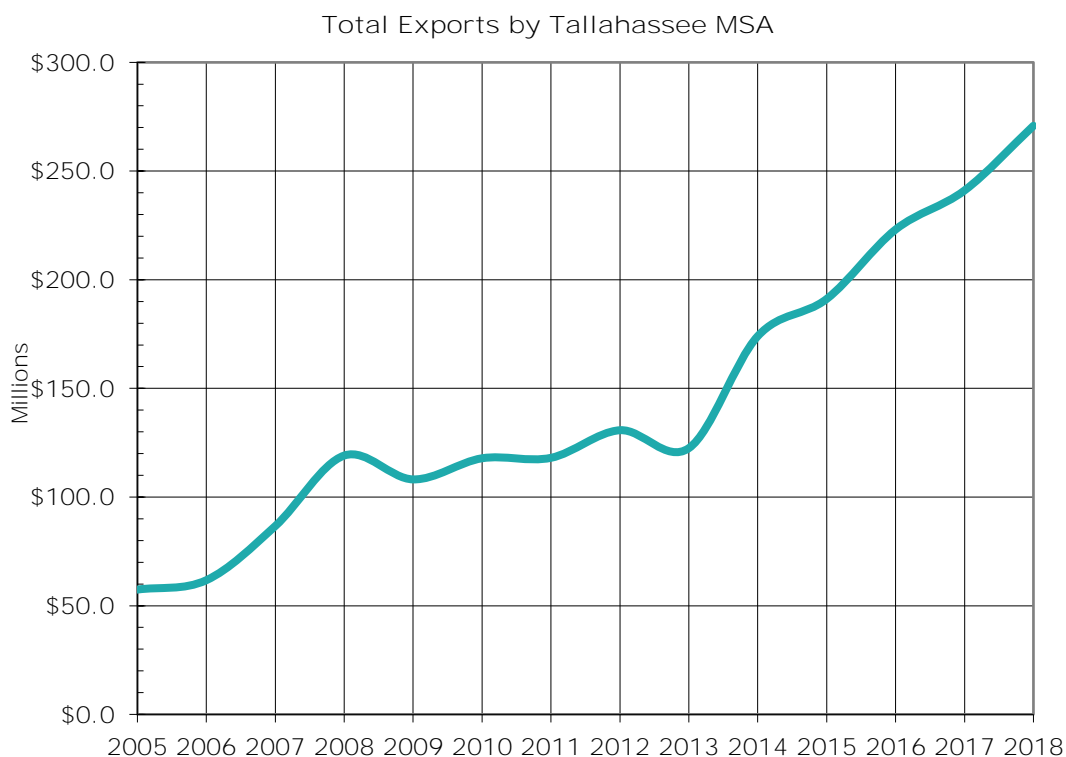
Total Merchandise Exports

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

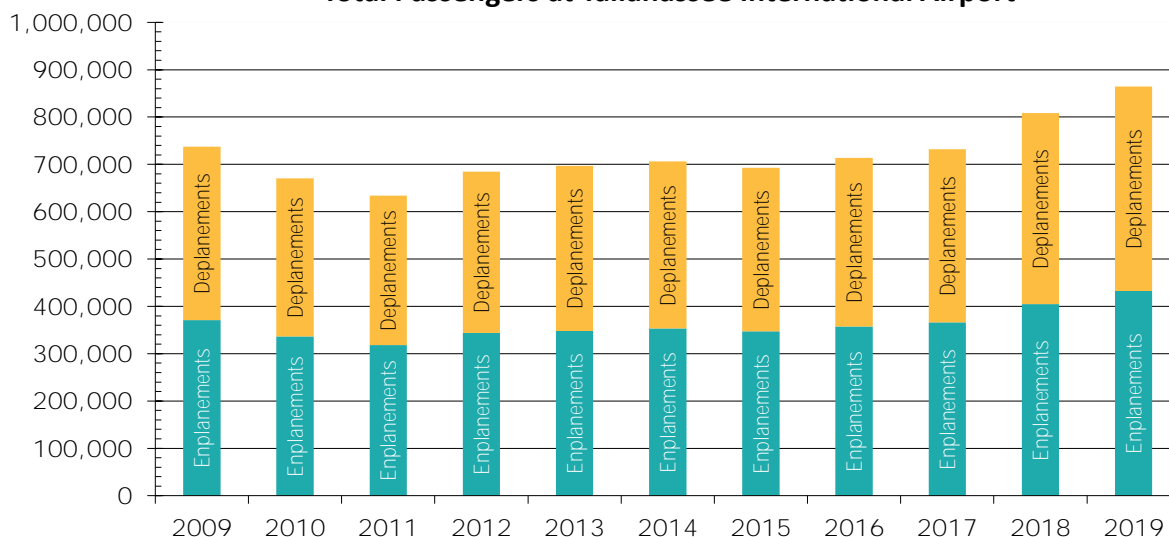
Total Passengers at TLH

Trend: Passenger traffic at Tallahassee International Airport increased 6.7% in 2019 from 2018 and was 18.3% higher than the 2014-2018 annual average of 730,842.

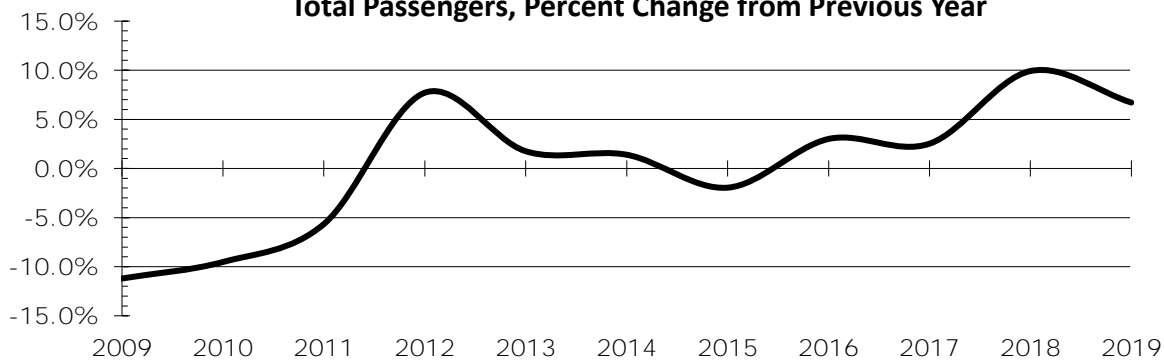
Year	Enplanements	Deplanements	Total Passengers	Percent Change from Previous Year
2009	371,106	366,579	737,685	-11.2%
2010	336,598	334,099	670,697	-9.5%
2011	318,172	315,619	633,791	-5.7%
2012	344,078	340,533	684,611	7.7%
2013	348,185	348,539	696,724	1.8%
2014	353,253	353,275	706,528	1.4%
2015	346,992	345,857	692,849	-2.0%
2016	357,579	356,407	713,986	3.0%
2017	366,408	365,827	732,235	2.5%
2018	404,807	403,806	808,613	9.9%
2019	432,563	432,167	864,730	6.7%

Source: Tallahassee International Airport

Total Passengers at Tallahassee International Airport



Total Passengers, Percent Change from Previous Year





Economic Factors

Leon County Tourism

Visitors, Visitor Spending and Economic Impact

Trend: In FY 2019, Leon County had 2,438,959 visitors, up 3% from FY 2018. Direct expenditures of visitors amounted to \$659.1 million in FY 2019, an increase of 14.4% from FY 2018.

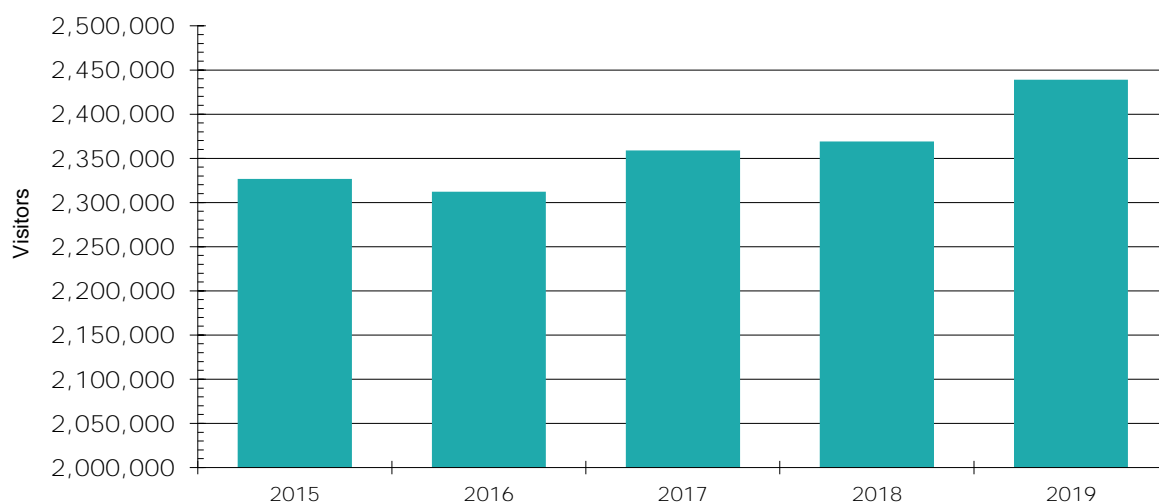
Fiscal Year*	Visitors	Direct Expenditures (\$ millions)	Total Economic Impact (\$ millions)
2015	2,326,769	\$531.6	\$763.1
2016	2,312,120	\$532.5	\$771.3
2017	2,358,833	\$566.9	\$895.8
2018	2,368,988	\$576.2	\$910.2
2019	2,438,959	\$659.1	\$1,041.7

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

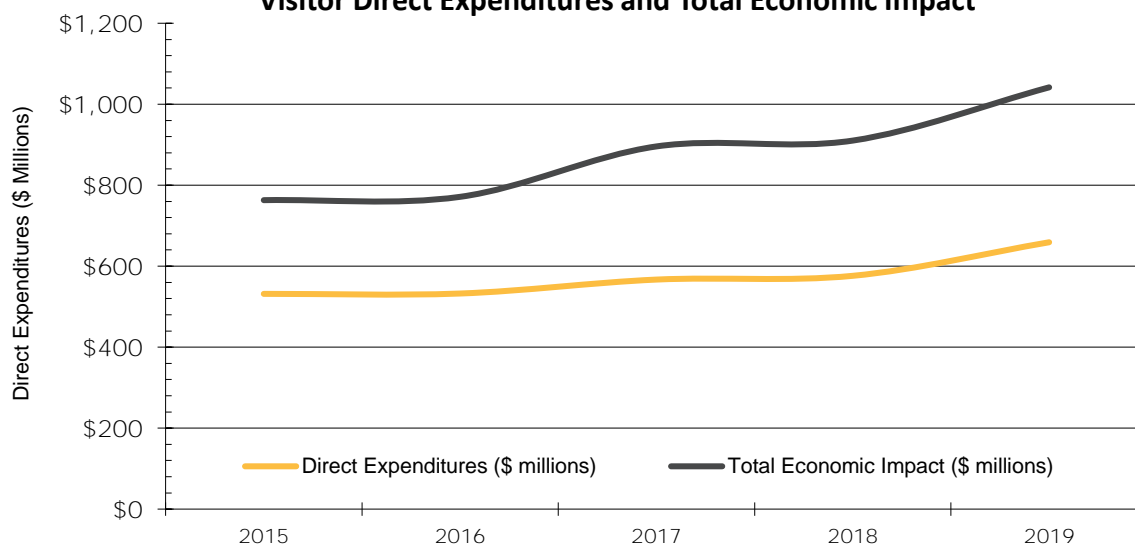
* Fiscal Year is October 1 to September 30.

Source: Visit Tallahassee and Downs & St. Germain Research

Annual Visitors



Visitor Direct Expenditures and Total Economic Impact





Economic Factors

Leon County Tourism

Visitors, Visitor Spending and Economic Impact

Trend: In FY 2019, Leon County had 2,438,959 visitors, up 3% from FY 2018. Direct expenditures of visitors amounted to \$659.1 million in FY 2019, an increase of 14.4% from FY 2018.

Person-Visits to Leon County, 1997-2014

(For Reference Only, Not Compatible with Visitors Data)

Year	Person-Visits	Annual Visitor Spending (\$ millions)
1997	1,851,000	\$429
1998	1,940,000	\$613
1999	2,133,000	\$701
2000	2,433,000	\$988
2001	2,203,000	\$853
2002	2,352,000	\$874
2003	2,571,000	\$774
2004	2,784,000	\$805
2005	2,751,000	\$772
2006	2,545,000	\$749
2007	2,402,000	\$641
2008	2,270,000	\$587
2009	—	—
2010	2,266,000	\$518
2011	2,564,000	\$577
2012	2,430,000	\$624
2013	2,778,000	\$914
2014	2,200,000	\$573

Note: 1997-2014 Person-Visits data not compatible with Visitors data for 2015 and forward.

Source: Leon County Tourism Development Council; Bonn Marketing Research Group, Inc.



Economic Factors

Taxable Sales:

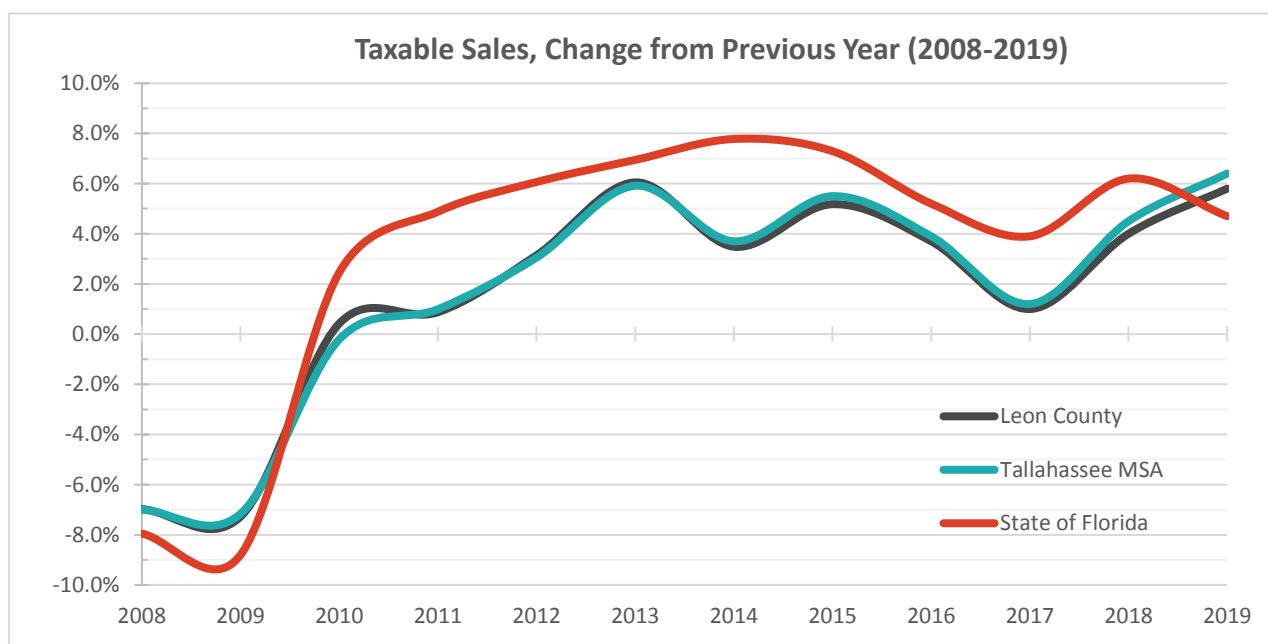
Annual Taxable Sales, Change from Previous Year

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 6.4% in the Tallahassee MSA in 2019. Taxable sales for the State of Florida were up 4.7% in 2019 compared with 2018.

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%
2019	\$4,633.0	5.8%	\$5,341.9	6.4%	\$473,778.0	4.7%

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

Source: Florida Department of Revenue





Economic Factors

Taxable Sales:

Annual Taxable Sales,

Tallahassee MSA by Category

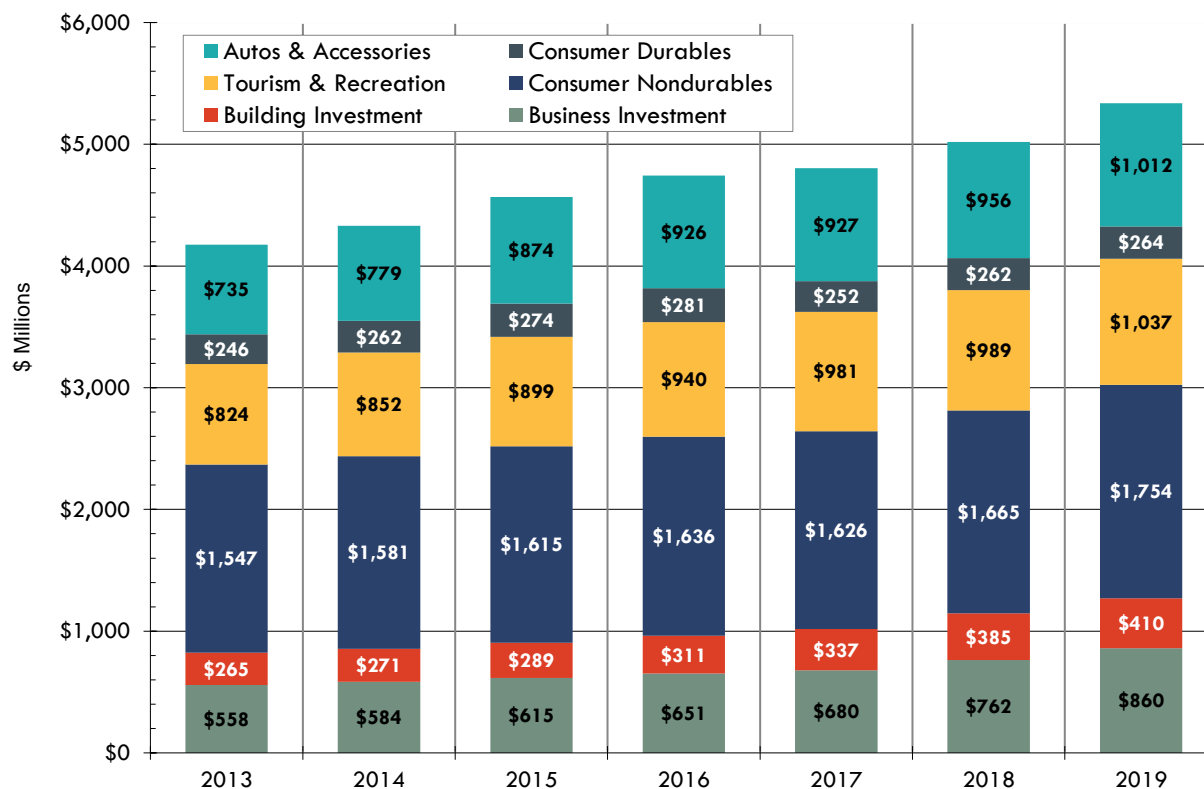
Trend: For the Tallahassee MSA, four of the six categories exhibited an increase in taxable sales each year between 2013 and 2019. Building Investment increased on average 7.6% each year; Business Investment, 7.5%; Autos & Accessories, 5.5%; Tourism & Recreation, 3.9%; Consumer Nondurables, 2.1%; Consumer Durables, 1.3%. Taxable sales make up an estimated 40-45% of all retail sales.

Category	2013	2014	2015	2016	2017	2018	2019
Autos & Accessories	\$734.7	\$778.9	\$874.3	\$925.5	\$926.6	\$955.9	\$1,012.3
Consumer Durables	\$246.1	\$262.1	\$274.3	\$280.5	\$251.5	\$262.0	\$264.1
Tourism & Recreation	\$824.1	\$852.0	\$898.7	\$939.7	\$981.2	\$989.2	\$1,036.7
Consumer Nondurables	\$1,546.9	\$1,581.0	\$1,615.1	\$1,636.1	\$1,626.3	\$1,665.3	\$1,753.5
Building Investment	\$265.1	\$271.0	\$288.7	\$310.9	\$337.0	\$385.0	\$409.6
Business Investment	\$557.6	\$584.2	\$615.1	\$651.3	\$679.7	\$762.3	\$859.8
TOTAL	\$4,174.5	\$4,329.2	\$4,566.2	\$4,744.0	\$4,802.3	\$5,019.7	\$5,336.1

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

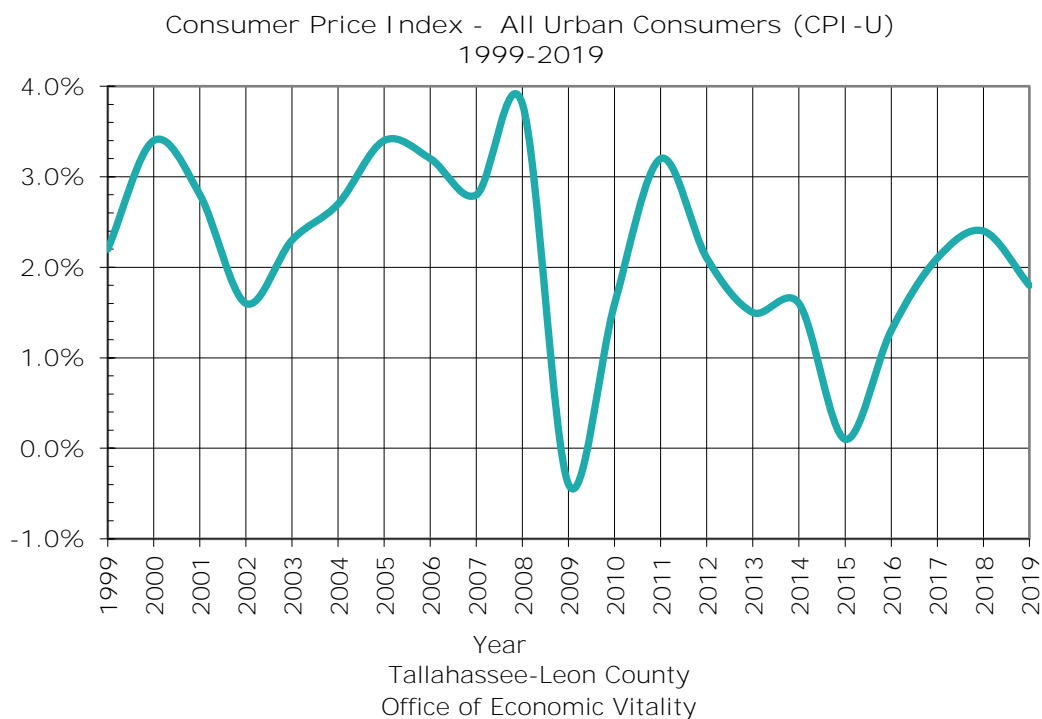
Consumer Price Index (CPI-U)

Annual Change in Consumer Price Index

Trend: The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 1.8% in 2019 following a 2.4% increase in 2018.

Year	U.S. City Average	% Change from Previous
1999	166.6	2.2%
2000	172.2	3.4%
2001	177.1	2.8%
2002	179.9	1.6%
2003	184.0	2.3%
2004	188.9	2.7%
2005	195.3	3.4%
2006	201.6	3.2%
2007	207.3	2.8%
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%
2019	255.7	1.8%

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





Economic Factors

Bank Deposits:

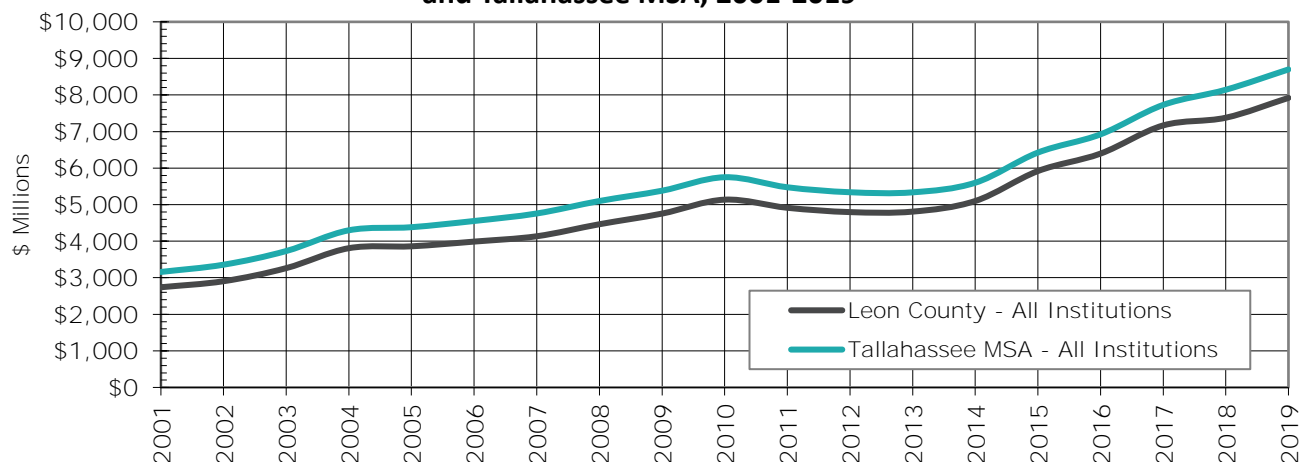
FDIC Summary of Deposits

Trend: Over \$7.3 billion in deposits were held in Leon County in FDIC-insured institutions as of June 30, 2019. Total Leon County deposits increased 7.3% 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 2001-2019, 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
2019	18	74	\$7,920	18	83	\$8,698	204	4,818	\$603,547

Source: FDIC, Summary of Deposits

FDIC Summary of Deposits, Leon County and Tallahassee MSA, 2001-2019



Economic Factors

C2ER Annual Cost of Living Index

Trend: In 2019, the Tallahassee urban area captured an overall composite index of 97.1%, or 2.9% below the average cost of living for all participating urban areas.

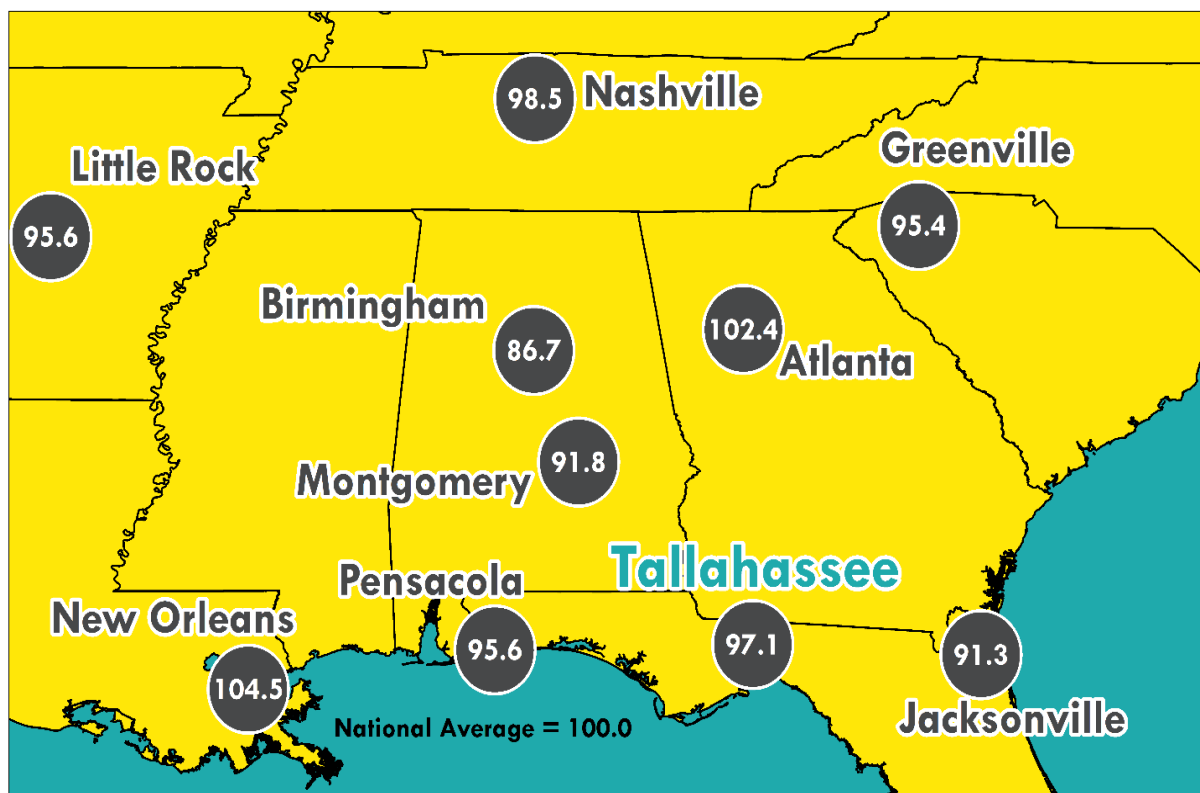
The Annual Cost of Living Index (COLI) is released by the Council for Community and Economic Research (C2ER) to measure regional differences in the cost of consumer goods and services (like grocery items, healthcare, and housing), excluding taxes and non-consumer expenditures, for professional and managerial 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	86.7	87.0	75.2	106.5	89.7	84.7	89.6
Jacksonville, FL	91.3	98.1	87.0	97.8	85.8	83.6	92.6
Montgomery, AL	91.8	100.2	82.7	106.4	91.2	82.5	93.0
Greenville, SC	95.4	103.9	79.8	93.4	96.3	102.2	103.7
Pensacola, FL	95.6	101.3	85.9	116.9	96.5	97.4	94.8
Little Rock, AR	95.6	94.8	87.1	97.5	94.6	89.6	103.1
<i>Tallahassee, FL</i>	<i>97.1</i>	<i>107.1</i>	<i>92.2</i>	<i>86.6</i>	<i>96.0</i>	<i>99.5</i>	<i>99.8</i>
Nashville, TN	98.5	99.3	97.4	97.1	97.7	92.3	100.3
Atlanta, GA	102.4	103.1	102.4	85.2	103.4	107.0	105.9
New Orleans, LA	104.5	102.4	124.1	81.6	101.1	115.1	96.0

Note: Gainesville, FL does not participate in COLI.

Source: Council for Community and Economic Research (C2ER)

2019 Cost of Living Index





Economic Factors

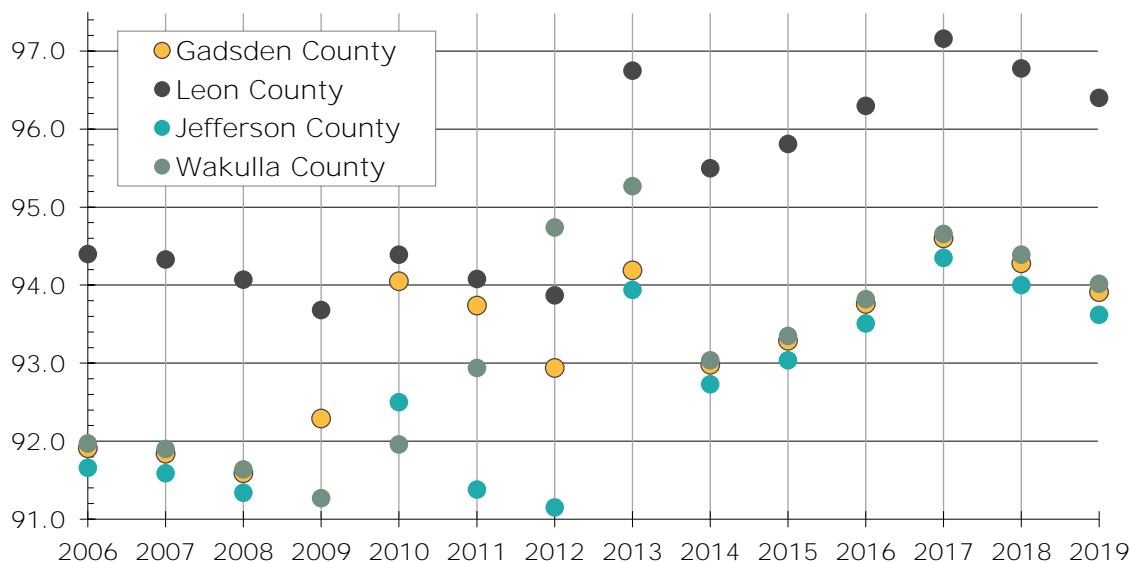
Florida Price Level Index

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 2019 FPLI, lives in Hillsborough County with an index value of 100.64. In 2019, the 20 counties with index values between 98.00 and 101.99 together accounted for 55.5% 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
2019	96.40	93.91	93.62	94.02

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 (2006-2019)





Economic Factors

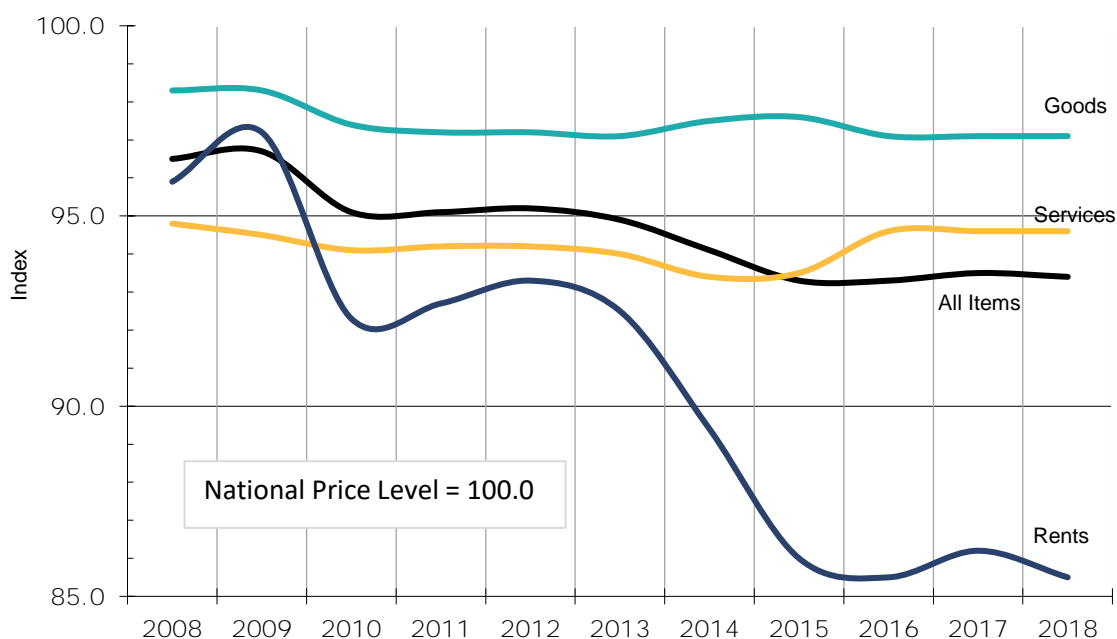
Regional Price Parities

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	93.3	97.1	94.6	85.5
2017	93.5	97.1	94.6	86.2
2018	93.4	97.1	94.6	85.5

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



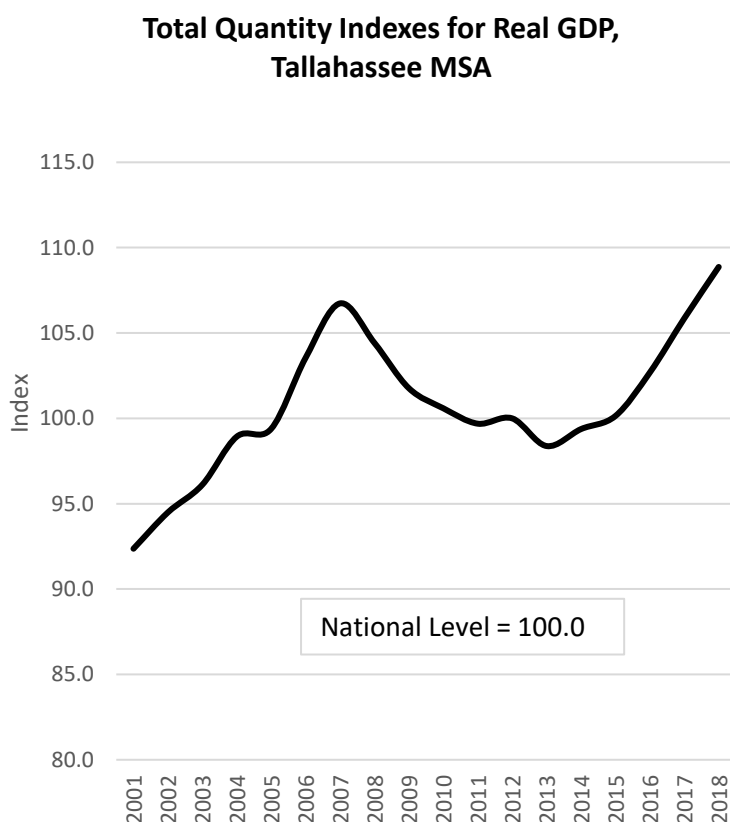


Economic Factors

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 indexes 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	92.4
2002	94.5
2003	96.1
2004	98.9
2005	99.4
2006	103.5
2007	106.7
2008	104.4
2009	101.8
2010	100.6
2011	99.7
2012	100.0
2013	98.4
2014	99.4
2015	100.1
2016	102.7
2017	105.9
2018	108.9



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

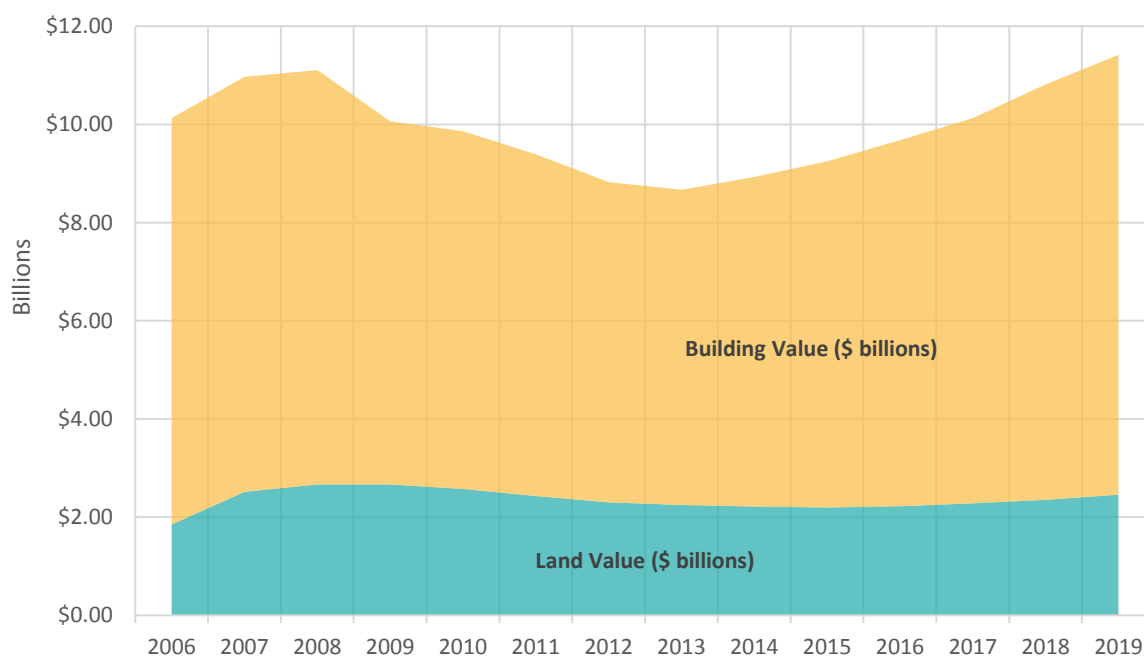
Trend: Residential property investment is a widespread method for local capital accumulation. Since 2013, acreage with homestead exemption has averaged 60,665 acres. Building value accounted for an average of 77% of total market value among homestead exempted properties since 2013. During 2015-2019, annual growth in total market value for homestead exempted properties averaged 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
2019	56,340	60,888	\$2.46	\$8.96	\$40,405	\$85.91

*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





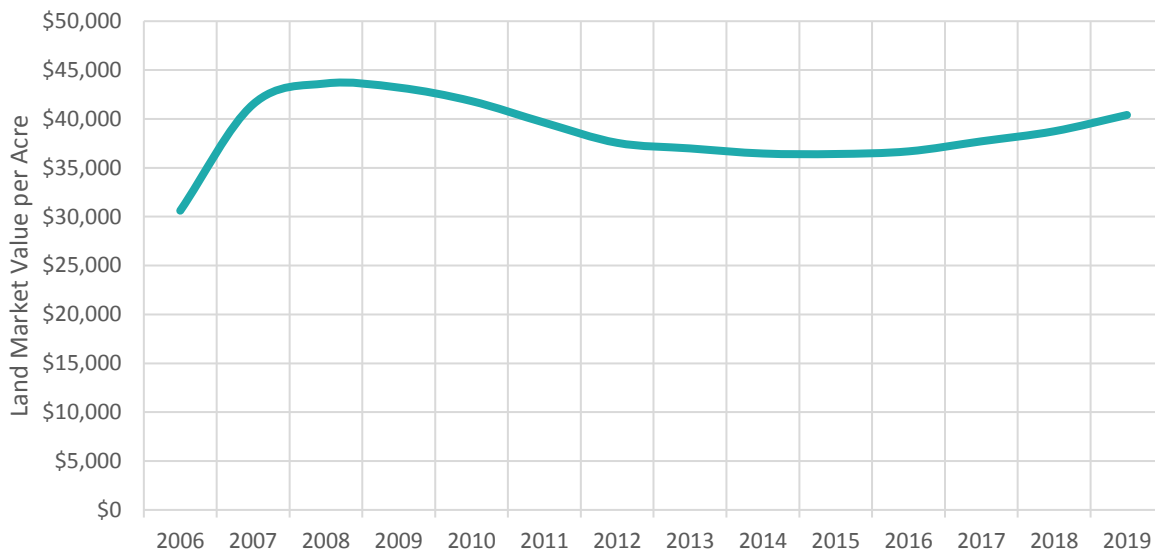
Economic Factors

Capital Accumulation

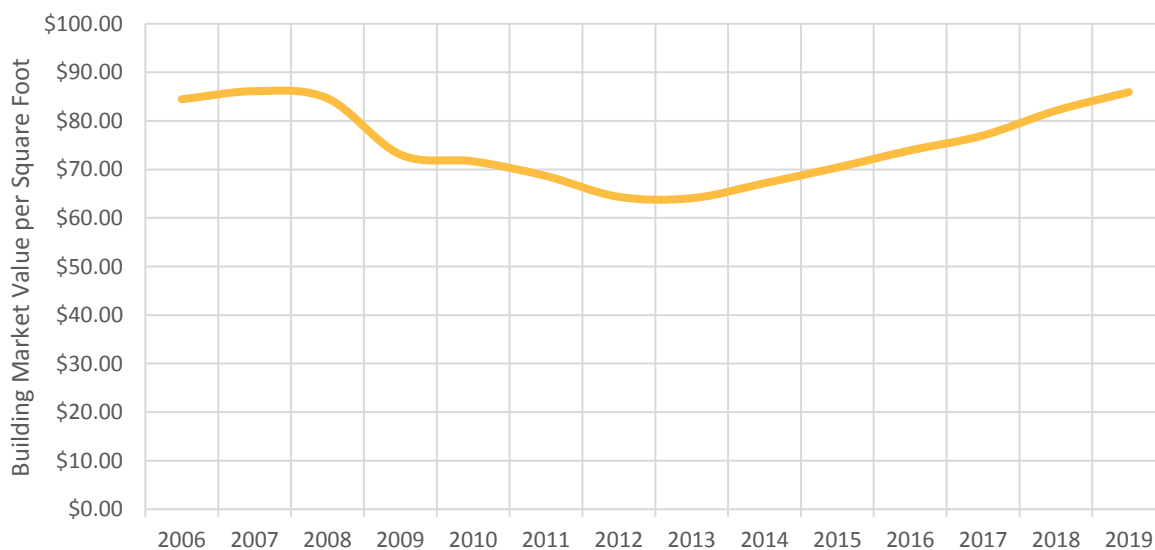
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Homestead Exemption Parcels in Leon County: Land Market Value per Acre



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





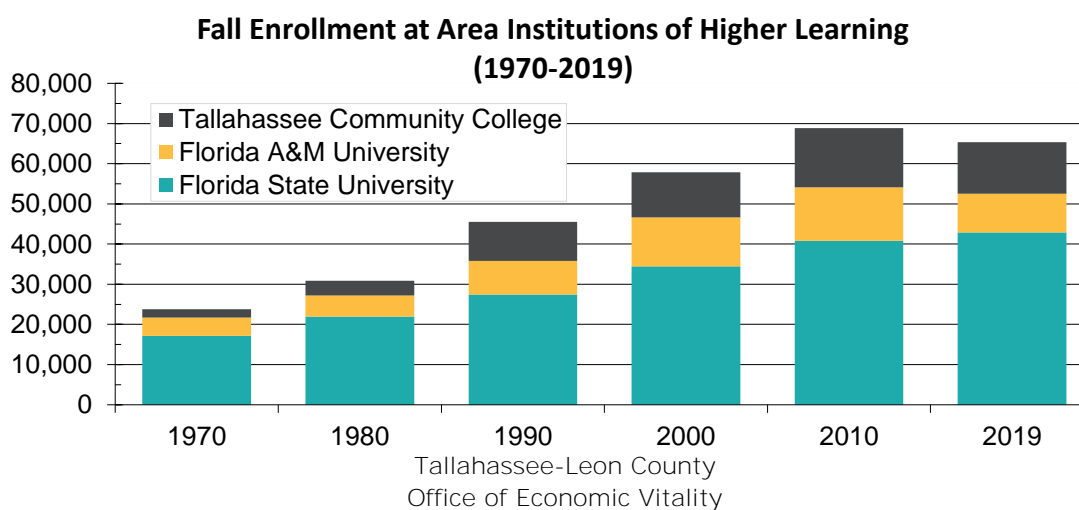
Education

Higher Education Institutions: Enrollment

Trend: Combined enrollment for Florida State University, Florida A&M University, and Tallahassee Community College has stabilized around 65,000 in the past several years.

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	13,655	65,136
2017	41,900	9,909	12,915	64,724
2018	41,717	10,031	12,851	64,599
2019	42,876	9,626	12,881	65,383

Source: Office of Institutional Research, Budget & Analysis Dept, Florida State University; Office of Institutional Research, Florida A&M University; Institutional Research Office, Tallahassee Community College





Education

Higher Education Institutions:

Enrollment by Level and Full-Time Status

Trend: Between 1990 and 2018, the proportion of full-time students rose from 69% to 78% of the total. The proportion of graduate students rose from 12% to 16% of the total during those same years.

Year	Undergraduate Total	Graduate Total	Full Time	Part Time
1990	43,192	5,882	34,270	15,478
1991	43,476	6,297	35,320	15,041
1992	43,947	6,413	36,012	15,041
1993	43,717	6,410	37,062	13,770
1994	45,470	6,465	38,016	14,614
1995	44,309	6,876	37,390	14,617
1996	44,013	6,993	37,330	14,569
1997	45,296	6,949	38,330	14,903
1998	46,991	6,649	40,686	14,013
1999	49,352	7,275	42,742	14,914
2000	49,554	7,287	43,364	14,559
2001	51,319	7,007	44,950	14,583
2002	52,669	7,260	46,753	14,592
2003	54,288	7,500	48,817	14,574
2004	55,909	8,204	50,229	15,355
2005	55,799	8,348	50,595	15,169
2006	55,669	8,727	50,773	15,305
2007	56,329	8,786	51,366	15,995
2008	54,999	11,074	50,751	15,322
2009	57,456	11,012	53,437	15,031
2010	59,707	10,993	55,400	15,300
2011	60,932	10,910	56,032	15,810
2012	58,917	10,528	54,040	15,405
2013	57,496	10,194	52,891	14,799
2014	56,828	10,024	51,937	14,915
2015	55,279	9,924	50,950	14,253
2016	54,699	10,090	50,598	14,191
2017	54,634	10,243	50,811	14,066
2018	54,155	10,417	50,660	13,912

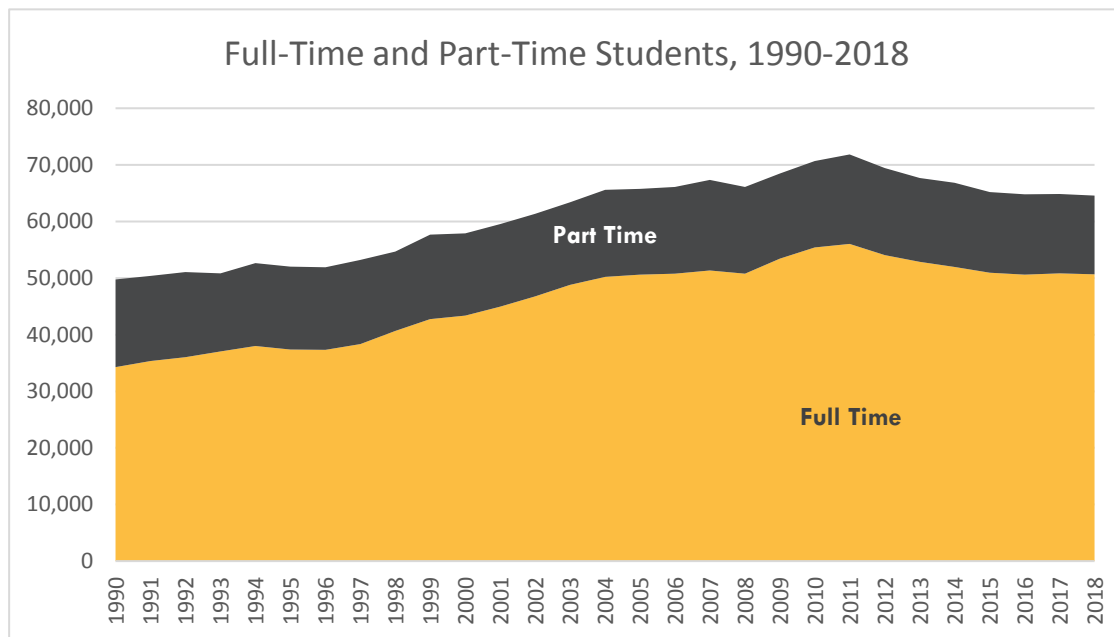
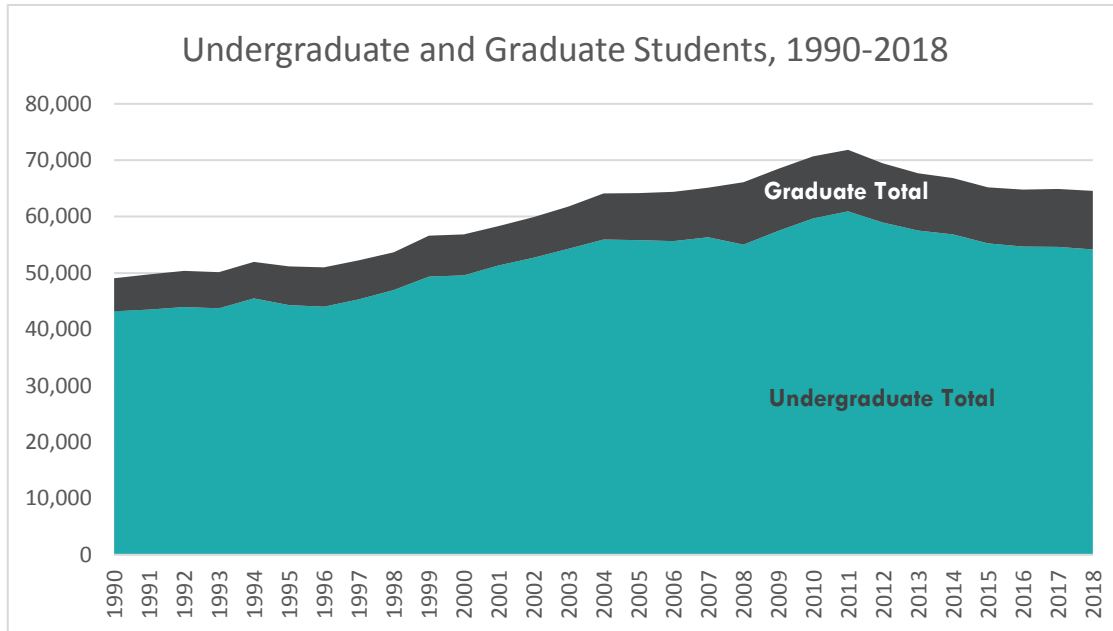
Note: Includes Aveda Institute-Tallahassee, Flagler College-Tallahassee, Florida A&M University, Florida State University, ITT Technical Institute-Tallahassee, Lively Technical Center, and Tallahassee Community College.

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



**Higher Education Institutions:
Degrees Conferred**

Trend: Between 2010 and 2018, on average nearly 17,500 postsecondary degrees were conferred annually by higher education institutions (16,400 baccalaureate level and higher, 1,100 below baccalaureate level), including an average of more than 1,100 doctoral degrees per year.

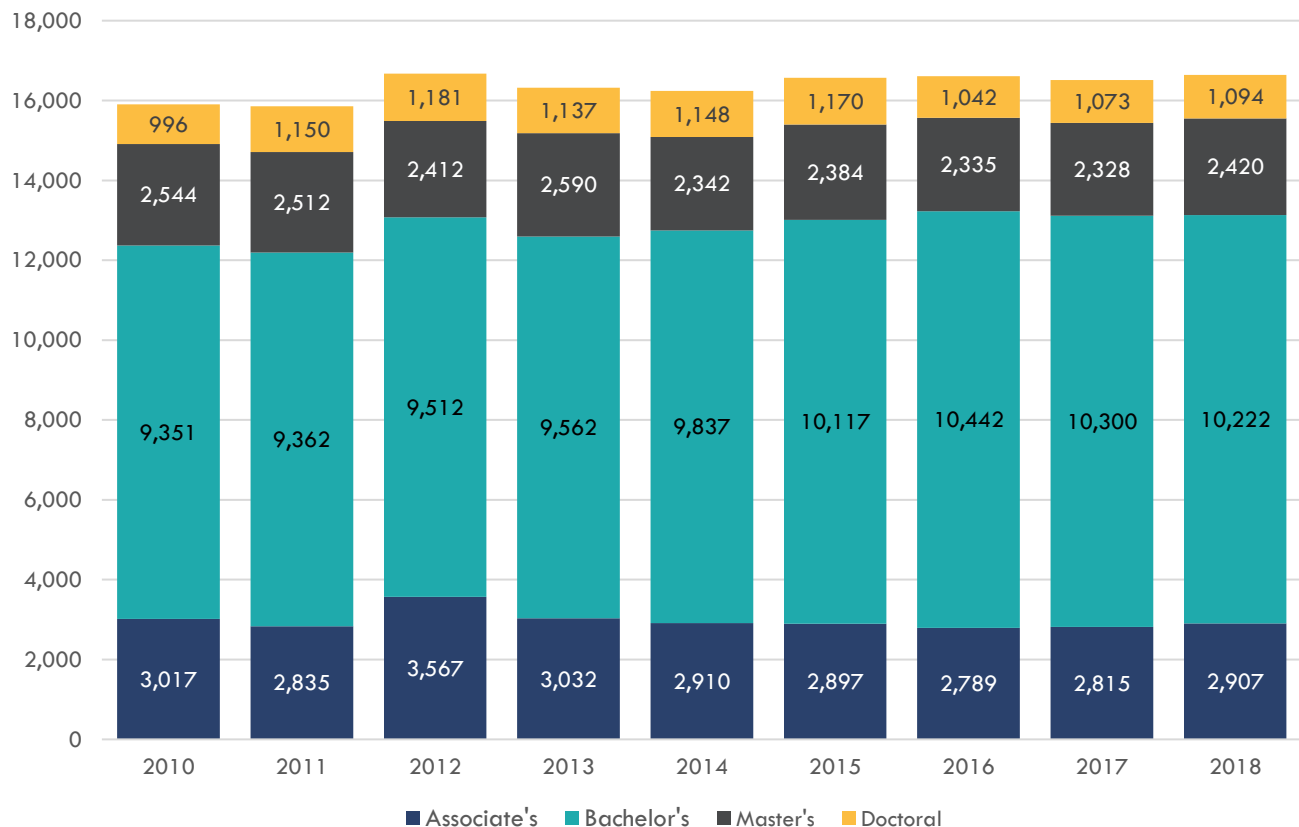
Baccalaureate Level and Above

School	Degree Type	2010	2011	2012	2013	2014	2015	2016	2017	2018
Flagler College-Tallahassee	Bachelor's	183	180	186	136	172	189	140	134	173
Florida A&M University	Associate's	47	67	59	102	113	67	54	48	40
	Bachelor's	1,242	1,296	1,466	1,488	1,560	1,507	1,676	1,555	1,258
	Master's	341	294	270	274	277	231	271	252	303
	Doctoral*	313	332	331	401	335	353	326	327	340
Florida State University	Associate's	98	111	163	133	192	177	192	190	183
	Bachelor's	7,926	7,886	7,860	7,938	8,105	8,421	8,626	8,611	8,791
	Master's	2,203	2,218	2,142	2,316	2,065	2,153	2,064	2,076	2,117
	Doctoral*	683	818	850	736	813	817	716	746	754
Tallahassee Community College	Associate's	2,872	2,657	3,278	2,687	2,523	2,523	2,543	2,577	2,684
Year Total		15,908	15,859	16,672	16,321	16,237	16,568	16,608	16,516	16,643

* Includes research/scholarship and professional practice degrees.

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

Total Degrees Awarded by Type, Baccalaureate Level and Above, 2010-2018



**Higher Education Institutions:
Degrees Conferred**

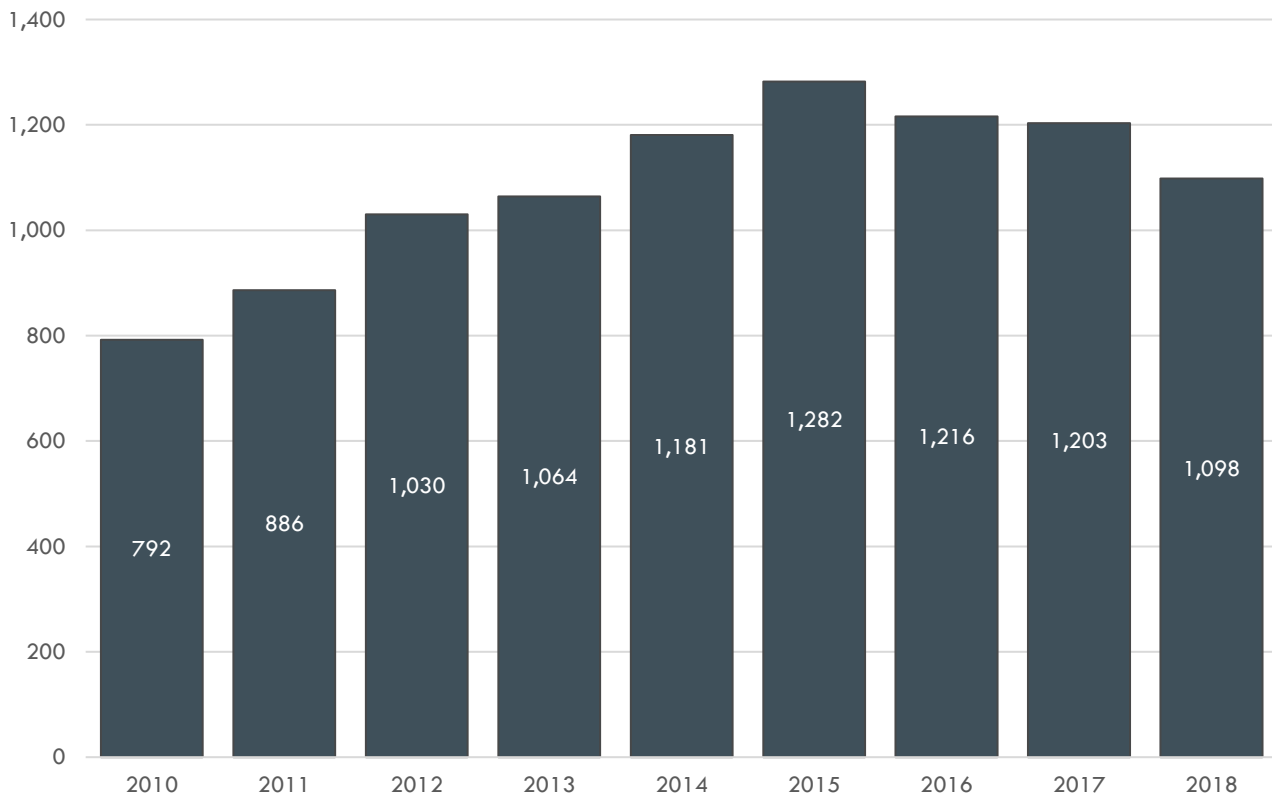
Trend: Between 2010 and 2018, on average nearly 17,500 postsecondary degrees were conferred annually by higher education institutions (16,400 baccalaureate level and higher, 1,100 below baccalaureate level), including an average of more than 1,100 doctoral degrees per year.

Below Baccalaureate Level

School	2010	2011	2012	2013	2014	2015	2016	2017	2018
Aveda Institute-Tallahassee	58	85	139	245	375	350	330	350	343
Lively Technical Center	324	379	408	340	294	313	318	277	247
Tallahassee Community College	410	422	483	479	512	619	568	576	508
Year Total	792	886	1,030	1,064	1,181	1,282	1,216	1,203	1,098

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

Total Degrees Awarded, Below Baccalaureate Level, 2010-2018





Education

Public Schools: Enrollment

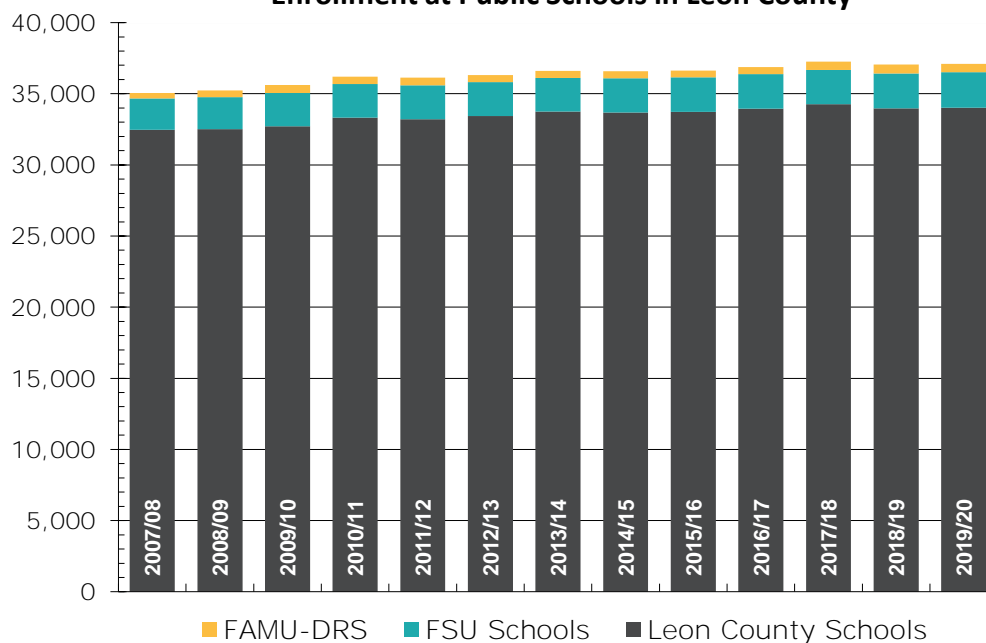
Trend: Public school enrollment has averaged around 36,700 over the past ten years, growing at an average annual rate of 0.4%.

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%
2019/20	600	2,497	34,012	37,109	0.2%

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

Enrollment at Public Schools in Leon County



Education

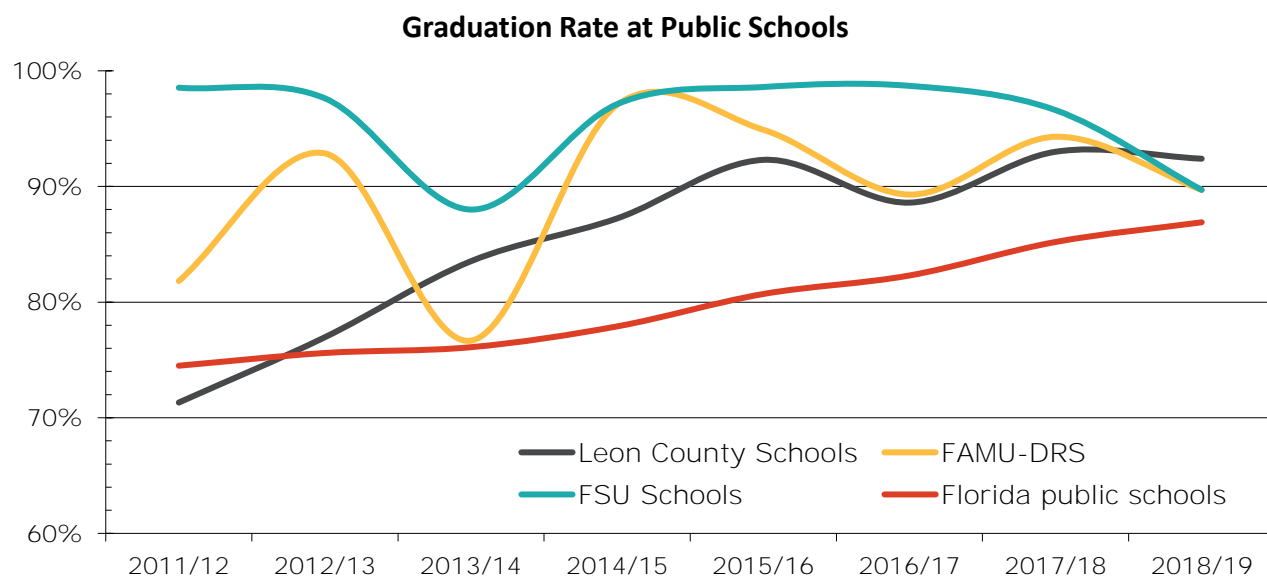
Public Schools: Graduation Rate

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%	180,411	85.2%
2018/19	2,139	92.4%	35	89.7%	142	89.7%	184,509	86.9%

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. The Florida Department of Education did not calculate K-12 school grades for the 2019-2020 school year due to effects of COVID-19 quarantine on reporting.

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. The Florida Department of Education did not calculate K-12 school grades for the 2019-2020 school year due to effects of COVID-19 quarantine on reporting.

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 2010-2018, an average of over 6,600 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

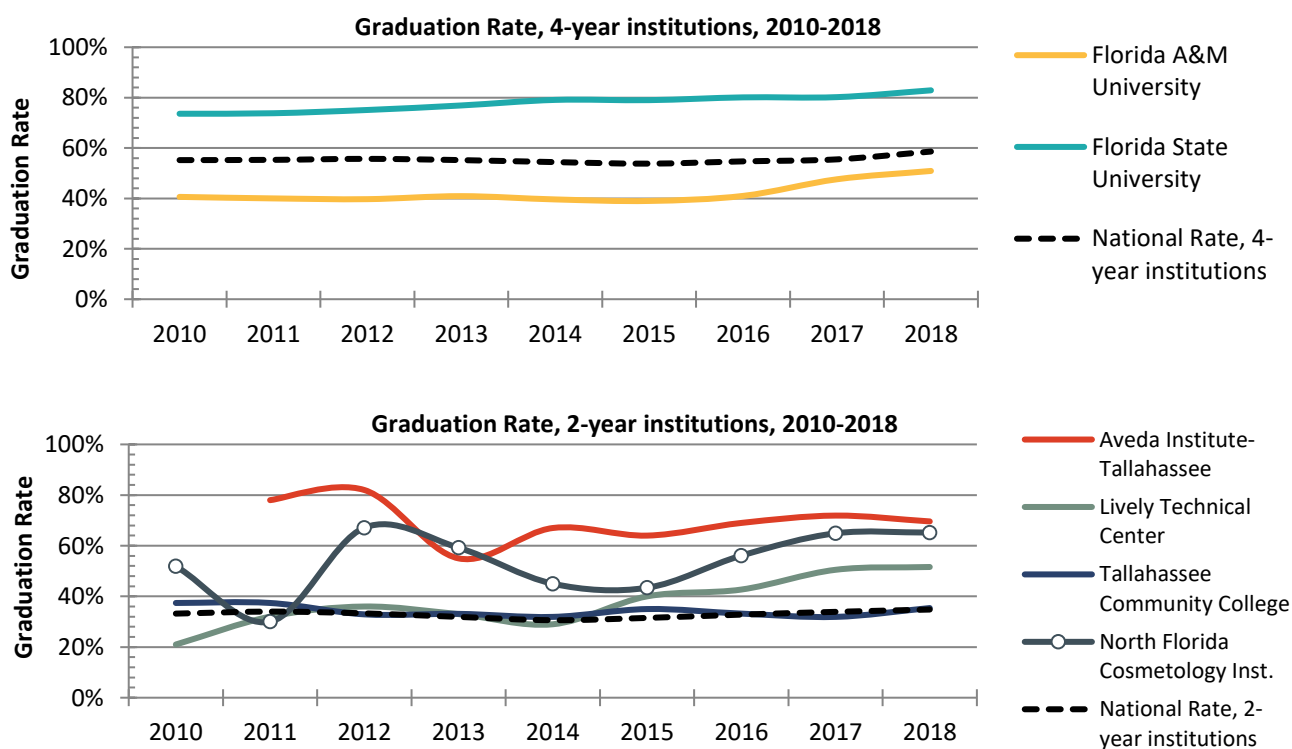
School	2010	2011	2012	2013	2014	2015	2016	2017	2018
Aveda Institute-Tallahassee	-	35	69	93	46	67	100	82	94
Florida A&M University	855	655	641	759	827	913	1,108	945	762
Florida State University	4,559	4,469	4,651	4,697	3,951	4,704	4,769	4,927	4,763
Lively Technical Center	151	253	368	288	233	250	256	267	275
North Florida Cosmetology Inst.	28	18	55	61	49	49	60	63	58
Tallahassee Community College	771	882	827	838	801	733	838	801	733
Year Total	6,364	6,312	6,611	6,736	5,907	6,716	7,131	7,085	6,685

Graduation Rate*

School	2010	2011	2012	2013	2014	2015	2016	2017	2018
Aveda Institute-Tallahassee		78%	82%	55%	67%	64%	69%	72%	70%
Florida A&M University	41%	40%	40%	41%	40%	39%	41%	48%	51%
Florida State University	74%	74%	75%	77%	79%	79%	80%	80%	83%
Lively Technical Center	21%	32%	36%	33%	29%	40%	43%	51%	52%
North Florida Cosmetology Inst.	52%	30%	67%	59%	45%	43%	56%	65%	65%
Tallahassee Community College	37%	37%	33%	33%	32%	35%	33%	32%	35%
National Rate, 4-year institutions	55%	55%	56%	55%	54%	54%	55%	56%	59%
National Rate, 2-year institutions	33%	34%	33%	32%	31%	32%	33%	34%	35%

* 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*

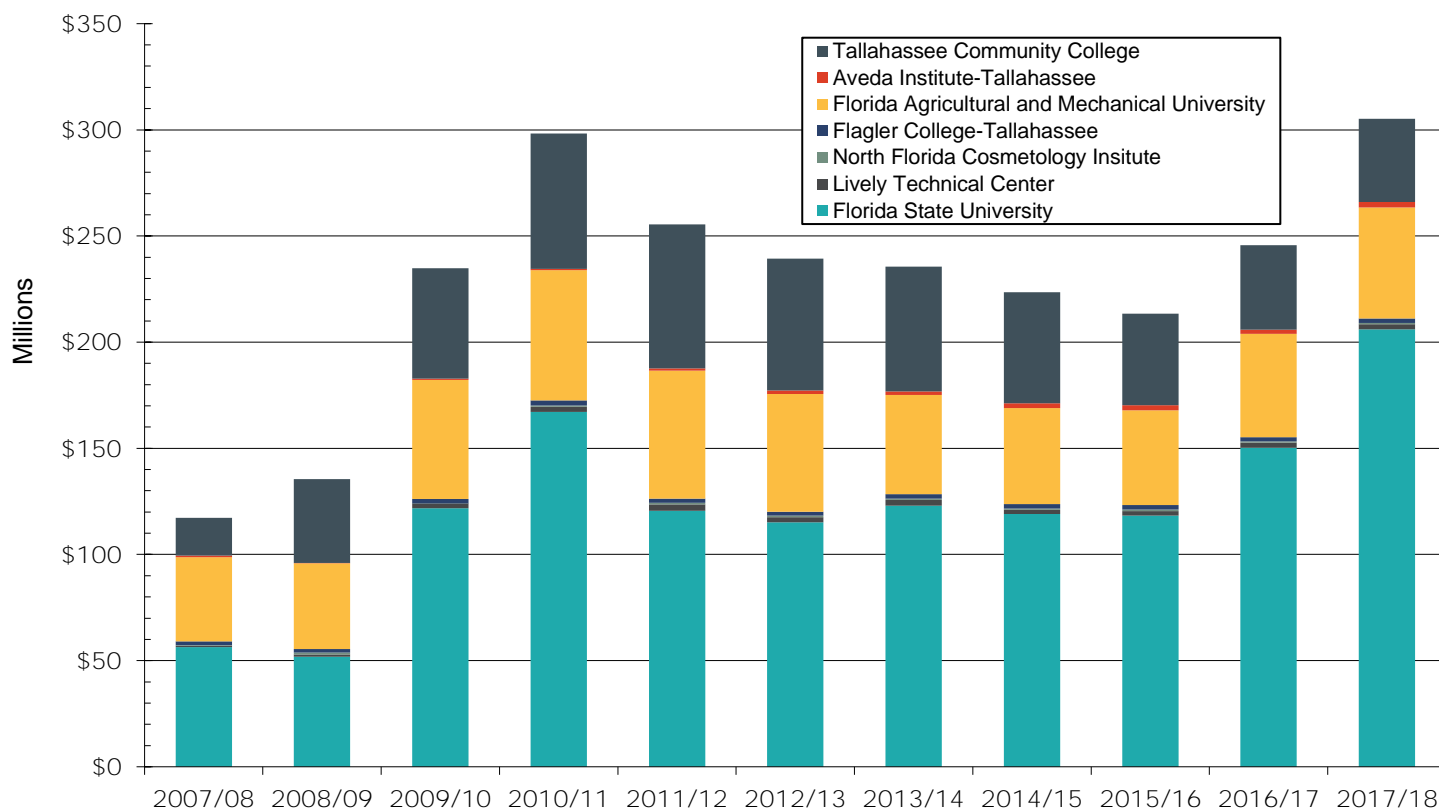
Trend: During 2013/14 to 2017/18, financial aid received by undergraduate students from all sources averaged \$244.7 million per year. FSU accounted for approximately 59%; FAMU, 19%; TCC, 19%; and other institutions, ~3%.

Year	Aveda Institute-Tallahassee	Flagler College-Tallahassee	Florida Agricultural and Mechanical University	Florida State University	Lively Technical Center	North Florida Cosmetology Insitute	Tallahassee Community College
2007/08	\$786,576	\$1,923,824	\$39,563,479	\$56,345,939	\$564,206	\$304,552	\$17,761,543
2008/09	\$234,404	\$1,722,429	\$40,255,788	\$51,822,807	\$1,142,554	\$835,683	\$39,544,213
2009/10	\$512,912	\$2,083,545	\$56,106,756	\$121,786,193	\$2,177,128	\$123,970	\$51,977,206
2010/11	\$583,863	\$2,445,680	\$61,302,528	\$167,123,605	\$2,361,961	\$684,974	\$63,807,067
2011/12	\$945,208	\$1,927,117	\$60,314,634	\$120,579,251	\$3,025,807	\$806,626	\$67,806,333
2012/13	\$1,626,372	\$1,825,064	\$55,546,343	\$115,087,913	\$2,498,158	\$685,354	\$62,066,585
2013/14	\$1,657,550	\$2,058,865	\$46,713,045	\$122,996,264	\$2,623,416	\$731,439	\$58,782,304
2014/15	\$2,365,607	\$2,168,252	\$45,145,262	\$119,003,105	\$2,001,611	\$562,096	\$52,336,809
2015/16	\$2,379,553	\$2,096,701	\$44,630,406	\$118,354,885	\$2,124,311	\$651,591	\$43,240,308
2016/17	\$1,998,147	\$1,921,383	\$48,639,363	\$150,310,663	\$2,302,467	\$688,002	\$39,819,172
2017/18	\$2,566,872	\$2,201,949	\$52,294,948	\$205,985,895	\$2,399,137	\$585,778	\$39,119,719

*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.

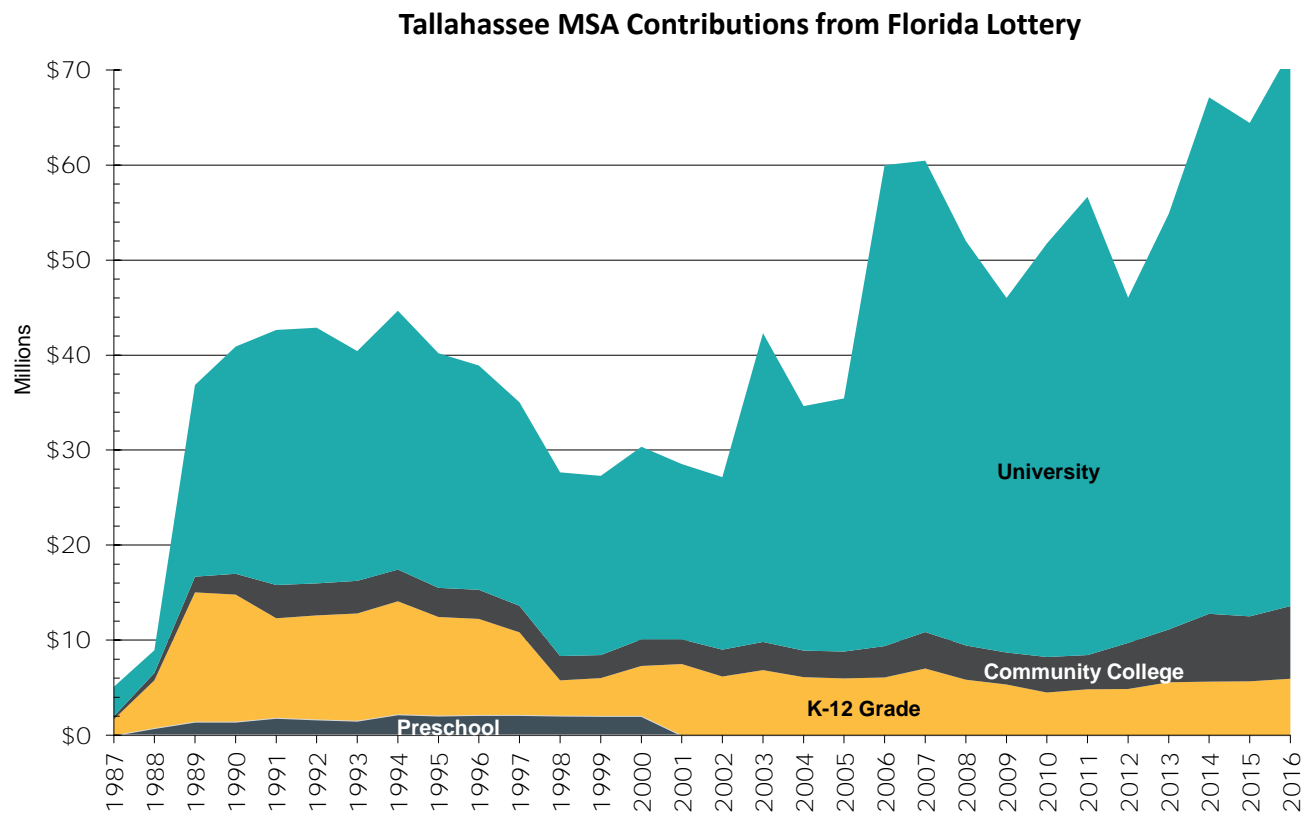
Fall Year	Contributions to County				Contributions by School Level			
	Gadsden	Jefferson	Leon	Wakulla	Preschool	K-12 Grade	Community College	University
1987	\$309,186	\$87,536	\$4,574,423	\$114,178	\$0	\$1,682,411	\$314,406	\$3,088,506
1988	\$1,233,498	\$358,387	\$6,894,949	\$440,144	\$739,555	\$5,016,869	\$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 2015 and 2019.

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
2019	104,104	12,197

Source: City of Tallahassee, Electric Utilities



Community and Environment

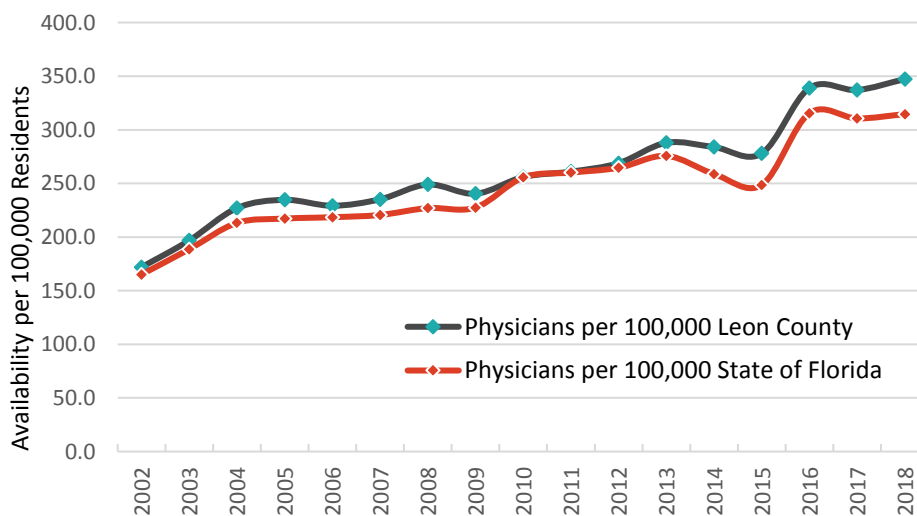
Health Resource Availability

Trend: During 2013-2018, availability of hospital beds in Leon County was on average 33% higher than Florida's, and availability of physicians was almost 9% 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
2018	347.3	314.6	416.2	308.2

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

Availability of Physicians

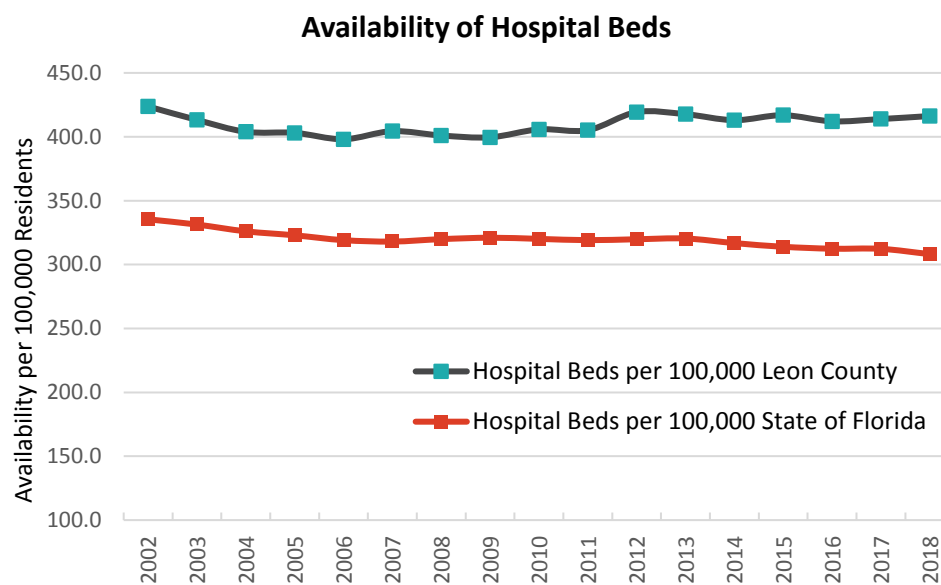




Community and Environment

Health Resource Availability

Trend: During 2013-2018, availability of hospital beds in Leon County was on average 33% higher than Florida's, and availability of physicians was almost 9% higher in Leon County than statewide.



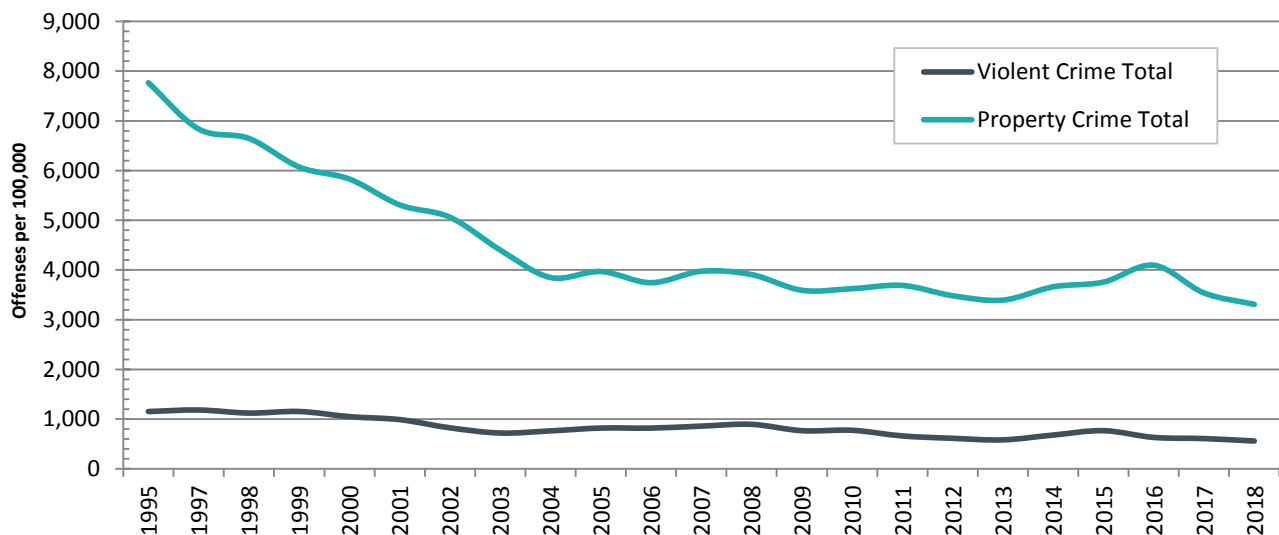
Trend: On a per capita basis, the overall frequency of property and violent crimes in the Tallahassee MSA in the 2010s has been lower than during the 1990s.

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
2018	7.0	73.1	99.6	379.1	558.9	593.7	2,443.3	270.6	3,307.6

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.

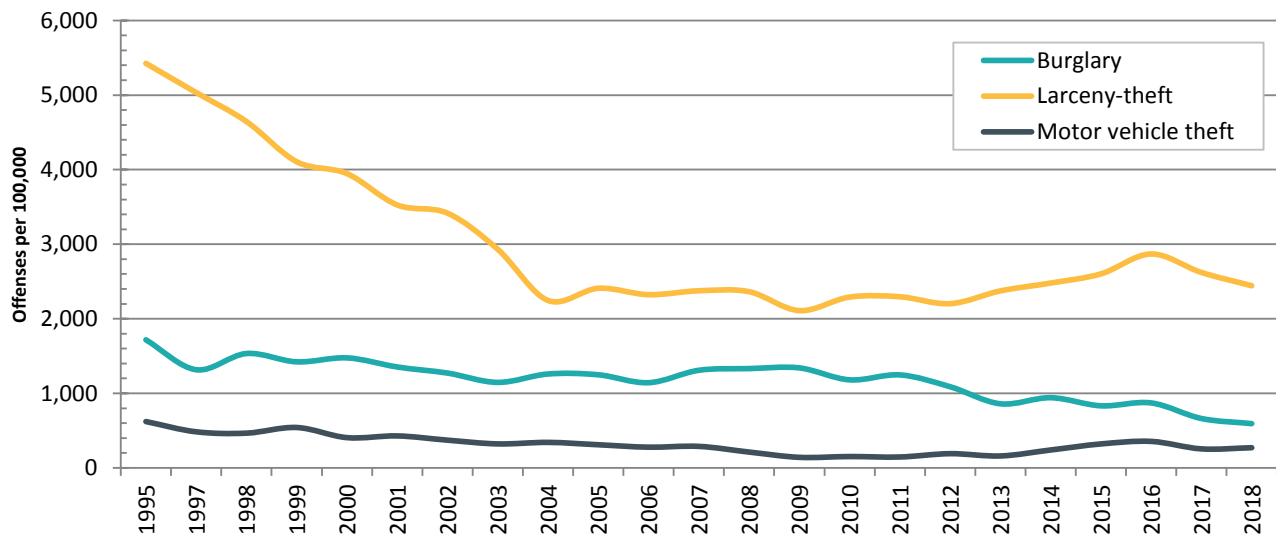
Source: FBI UCR

Index of Property and Violent Crimes in Tallahassee MSA

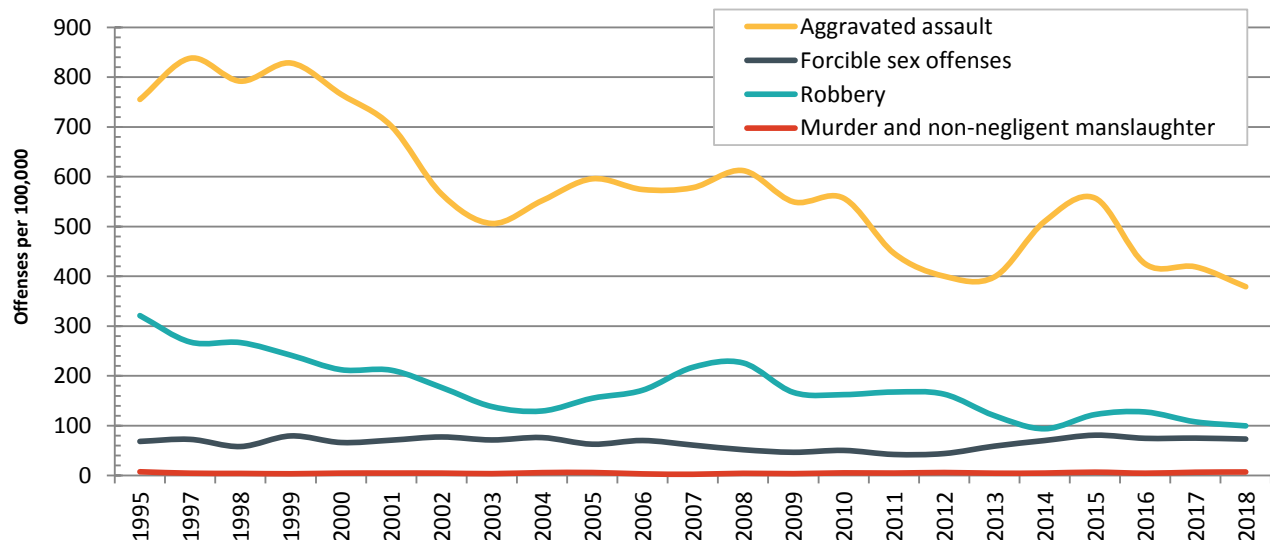


Trend: On a per capita basis, the overall frequency of property and violent crimes in the Tallahassee MSA in the 2010s has been lower than during the 1990s.

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
2019	3,272.5	2,168.7	573.0	382.4

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

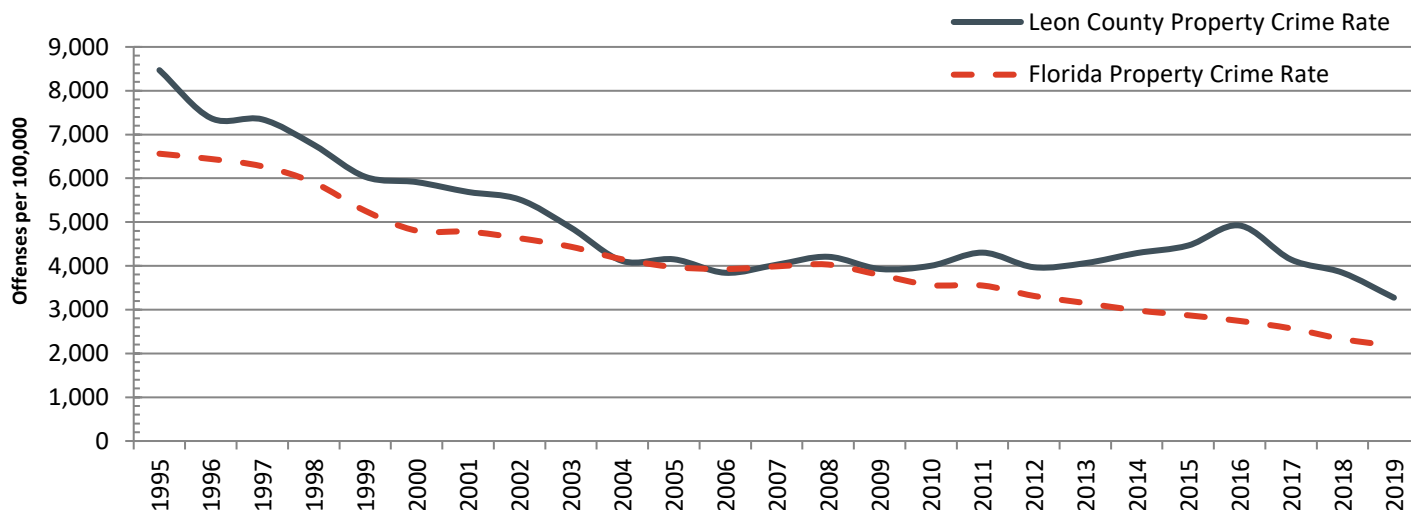
Source: Florida Department of Law Enforcement



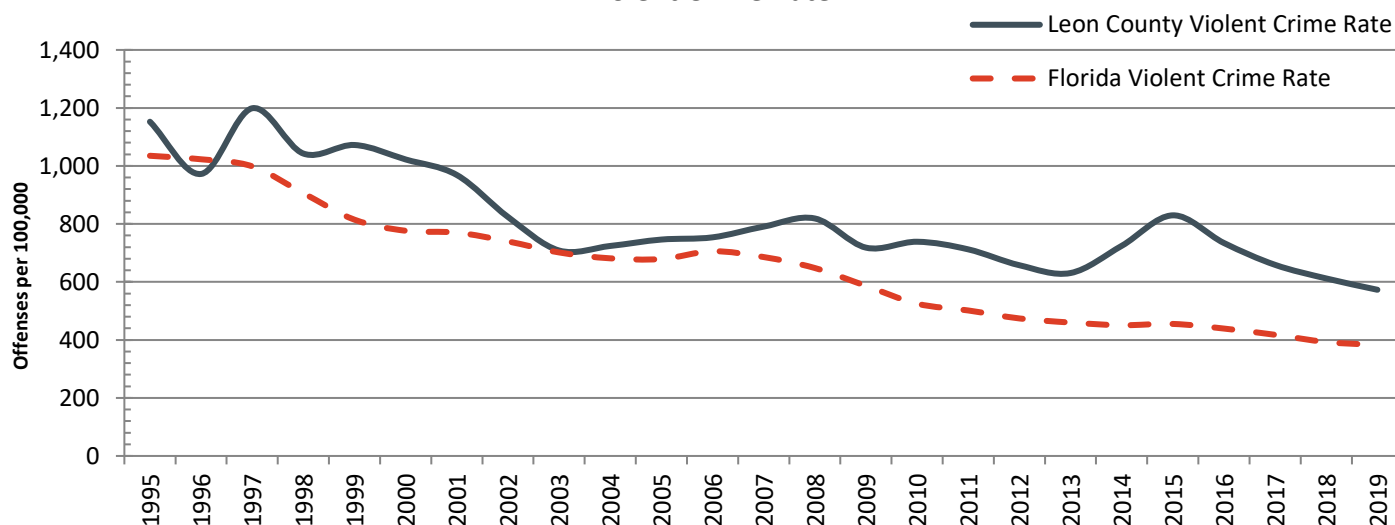
Community and Environment
Public Safety:
Leon County Crime Rate

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.

Property Crime Rate



Violent Crime Rate

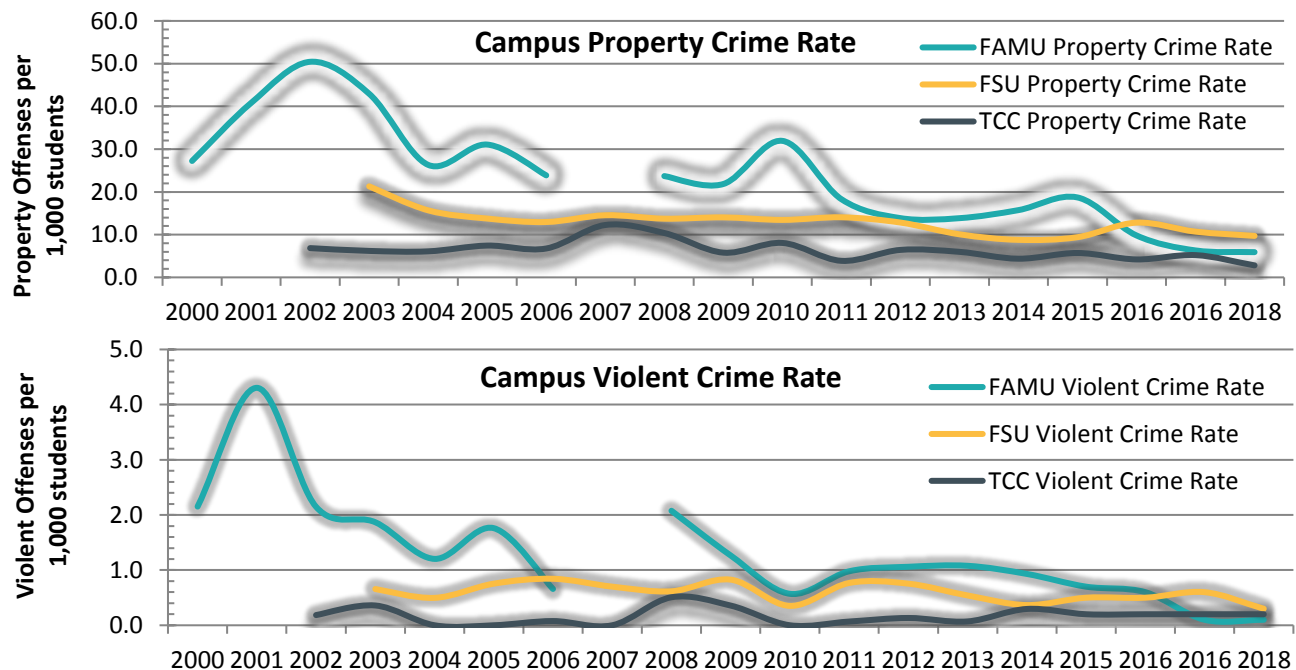


Trend: On a per student basis, the frequency of both violent and property crimes on the campuses of FAMU, FSU, and TCC have been lower in the 2010s than they were in the 2000s.

Year	FAMU Property Crime Rate	FSU Property Crime Rate	TCC Property Crime Rate	FAMU Violent Crime Rate	FSU Violent Crime Rate	TCC Violent Crime Rate
2000	27.2			2.2		
2001	40.8			4.3		
2002	50.4		6.8	2.1		0.2
2003	43.0	21.3	6.2	1.9	0.7	0.4
2004	26.3	15.7	6.1	1.2	0.5	0.0
2005	31.1	13.8	7.4	1.8	0.8	0.0
2006	23.9	13.0	6.8	0.7	0.8	0.1
2007		14.5	12.3		0.7	0.0
2008	23.7	13.7	10.4	2.1	0.6	0.5
2009	21.8	14.0	5.8	1.3	0.8	0.4
2010	31.9	13.4	8.1	0.6	0.4	0.0
2011	18.3	14.1	3.9	1.0	0.8	0.1
2012	13.9	12.8	6.4	1.1	0.8	0.1
2013	13.9	10.1	6.0	1.1	0.5	0.1
2014	15.7	8.8	4.4	0.9	0.4	0.3
2015	18.7	9.4	5.7	0.7	0.5	0.2
2016	9.8	12.8	4.2	0.6	0.5	0.2
2016	6.3	10.7	5.2	0.1	0.6	0.2
2018	5.9	9.7	2.8	0.1	0.3	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
2019 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	3.91900
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	0.03270
Inside City Limits Total		19.11410
Outside City Limits Total		15.01410
Downtown Improvement Area		20.11410

Source: Leon County Property Appraiser



Community and Environment

Tallahassee's History of Annexations

1927-2019

The City of Tallahassee has had a long history of annexation activity as a means of achieving growth. During its first 150 years, Tallahassee expanded from one-quarter of a mile in size to 28.18 square miles by 1980. Since 1980, the City has witnessed a tremendous increase in annexation activity with 75 additional square miles having been added during this time, swelling the size of Tallahassee to 103.53 square miles as of December 31, 2019. Many of the annexations in the early 1980s were accomplished through a double-referendum process that required the approval of voters living in the area proposed for annexation as well 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	16.32	98.18
2000 - 2004	98.18	3.82	102.00
2005 - 2009	102.00	1.06	103.06
2010	103.06	0.00	103.06
2011	103.06	0.19	103.25
2012	103.25	0.00	103.25
2013	103.25	0.00	103.25
2014	103.25	0.04	103.29
2015	103.29	0.00	103.29
2016	103.29	0.08	103.37
2017	103.37	0.08	103.45
2018	103.45	0.00	103.45
2019	103.45	0.08	103.53

Source: City of Tallahassee, *Underground Utilities & Public Infrastructure*; Tallahassee-Leon County Planning Department

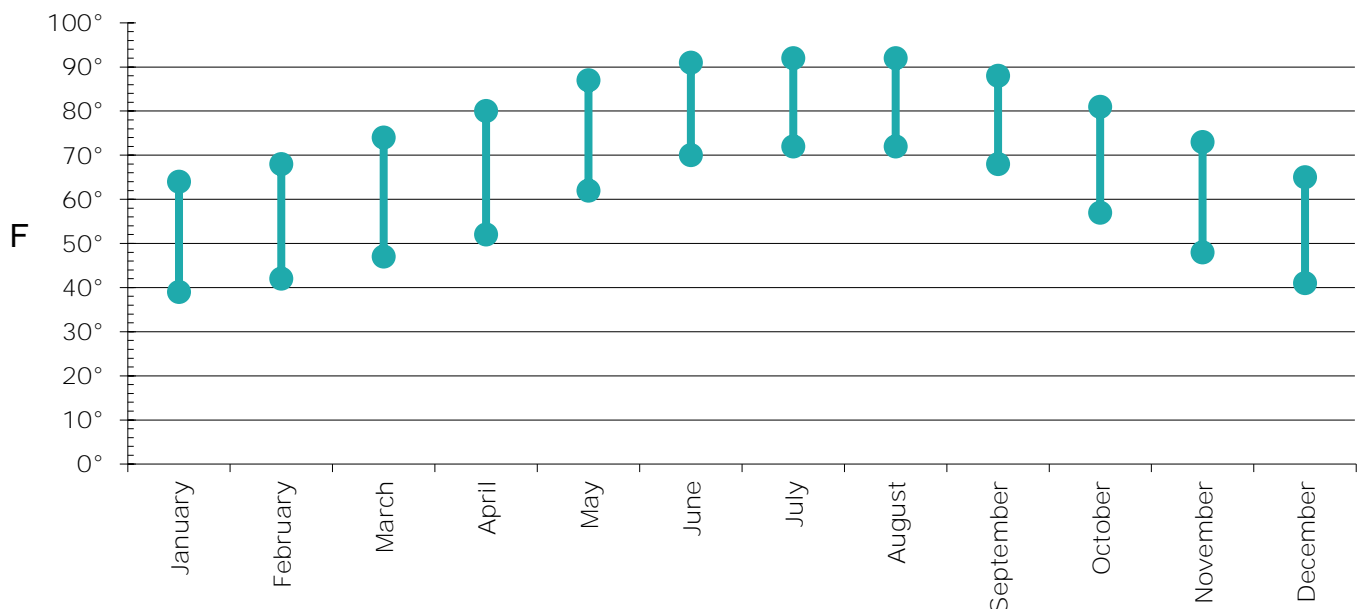
Trend: Tallahassee has a mild, moist climate characteristic of the Gulf States, experiencing a subtropical summer similar to the rest of Florida. In contrast to the Florida peninsula, Northwest Florida of which Tallahassee is a part, experiences four seasons. Prevailing winds average 5.5 miles per hour and are from a southerly direction in the spring and summer, then shift toward a more northerly direction later in the year. Tallahassee has clear skies on average 102 days per year; partly cloudy skies, 129 days; and cloudy skies, 134 days.

Month	Avg. High Temperature (°F) (1981-2010)	Avg. Low Temperature (°F) (1981-2010)	Avg. Days Above 90°F (1940-2018)	Avg. Days Below 32°F (1940-2018)	Avg. Number of Days With Rain (1940-2018)	Avg. Rainfall (Inches) (1981-2010)
January	64	39	0	10	9	4.3
February	68	42	0	6	8	4.9
March	74	47	*	2	8	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	15	7.4
September	88	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>79.6</i>	<i>55.8</i>	<i>91</i>	<i>29</i>	<i>114</i>	<i>59.2</i>

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

Source: National Climatic Data Center, Comparative Climatic Data

Tallahassee Average Daily Low and High Temperatures

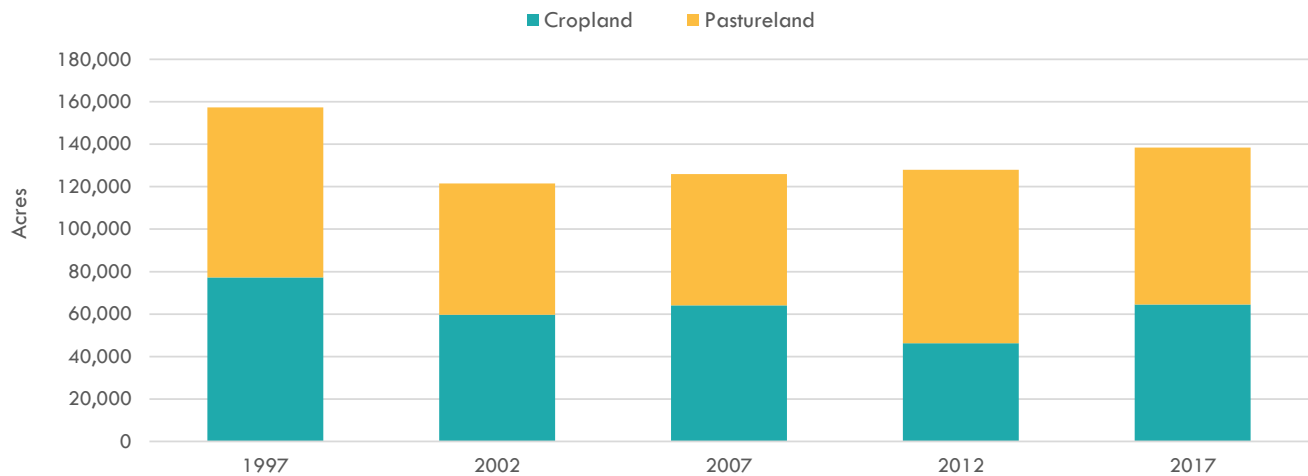


Trend: Gadsden and Jefferson counties account for most commercial agricultural activity in the Tallahassee MSA, with cotton, peanuts, and cattle as principal commodities. As of 2017, annual sales of crops and animals and animal products exceeded \$134 million.

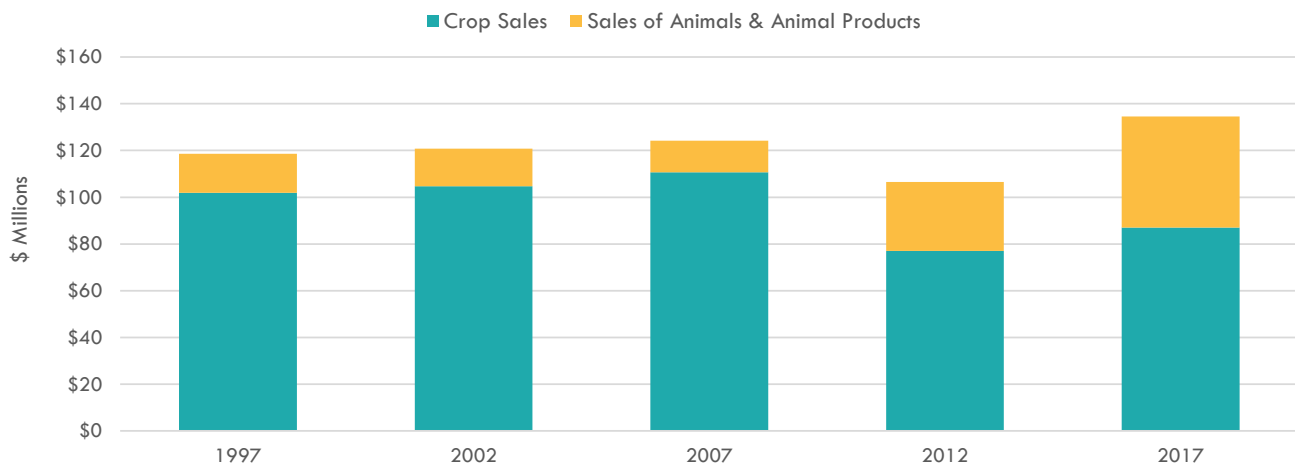
Year	Farmland Acreage in Tallahassee MSA		Agricultural Sales (\$1,000s)	
	Cropland	Pastureland	Crop Sales	Sales of Animals & Animal Products
1997	77,305	80,065	\$101,932	\$16,642
2002	59,617	61,881	\$104,659	\$16,115
2007	64,109	61,786	\$110,671	\$13,531
2012	46,237	81,696	\$77,070	\$29,494
2017	64,542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

Source: USDA, Census of Agriculture

Farmland Acreage in Tallahassee MSA



Agricultural Sales in Tallahassee MSA

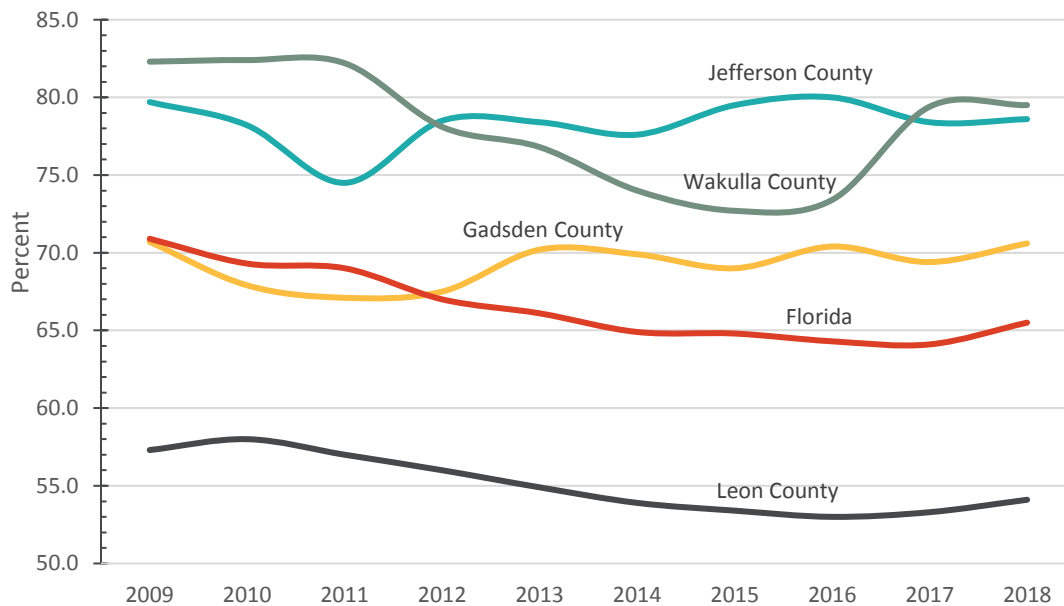


Trend: Homeownership rates in the Tallahassee MSA are highest in Jefferson and Wakulla counties. Due in part to its student population, Leon County's homeownership rate is the lowest in the Tallahassee MSA and lower than the State rate.

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
2018	54.1	78.6	70.6	79.5	65.5

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

Homeownership Rate in Tallahassee MSA



Community and Environment

Motor Vehicle Crashes in Leon County

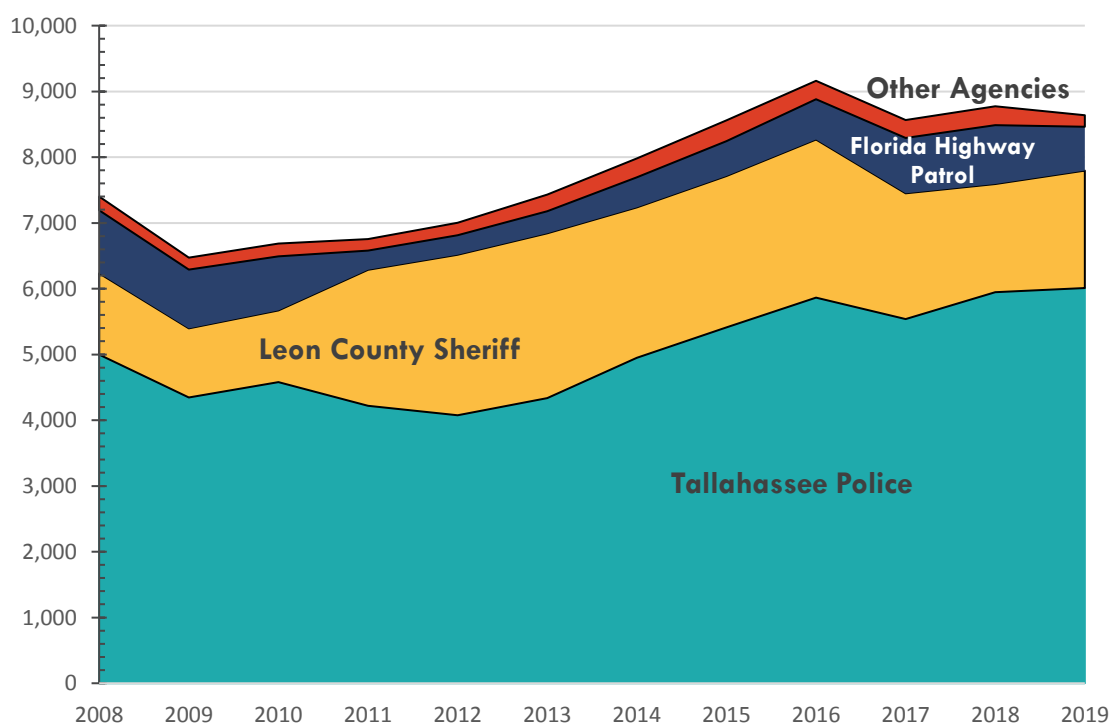
Trend: Between 2015 and 2019, there were on average about 8,600 motor vehicle crashes in Leon County each year (or about 24 per day), with an annual average of 33 traffic fatalities.

Year	Tallahassee Police	Leon County Sheriff	Florida Highway Patrol	Other Agencies	Total Crashes	Total Traffic Fatalities
2008	4,999	1,237	954	212	7,402	31
2009	4,345	1,050	895	182	6,472	28
2010	4,578	1,092	820	195	6,685	32
2011	4,218	2,071	289	178	6,756	34
2012	4,075	2,439	297	192	7,003	42
2013	4,335	2,508	336	250	7,429	17
2014	4,950	2,285	459	286	7,980	33
2015	5,411	2,300	531	319	8,561	29
2016	5,866	2,402	611	282	9,161	40
2017	5,536	1,916	840	271	8,563	34
2018	5,945	1,646	894	288	8,773	30
2019	6,009	1,785	669	175	8,638	33

Note: Includes only codeable (long form) crashes, some of which may be excluded from the Florida Department of Highway Safety and Motor Vehicles Crash Dashboard data. Other Agencies includes FSU Police, FAMU Police, and TCC Police.

Source: Signal Four Analytics, University of Florida GeoPlan Center

Motor Vehicle Crashes in Leon County



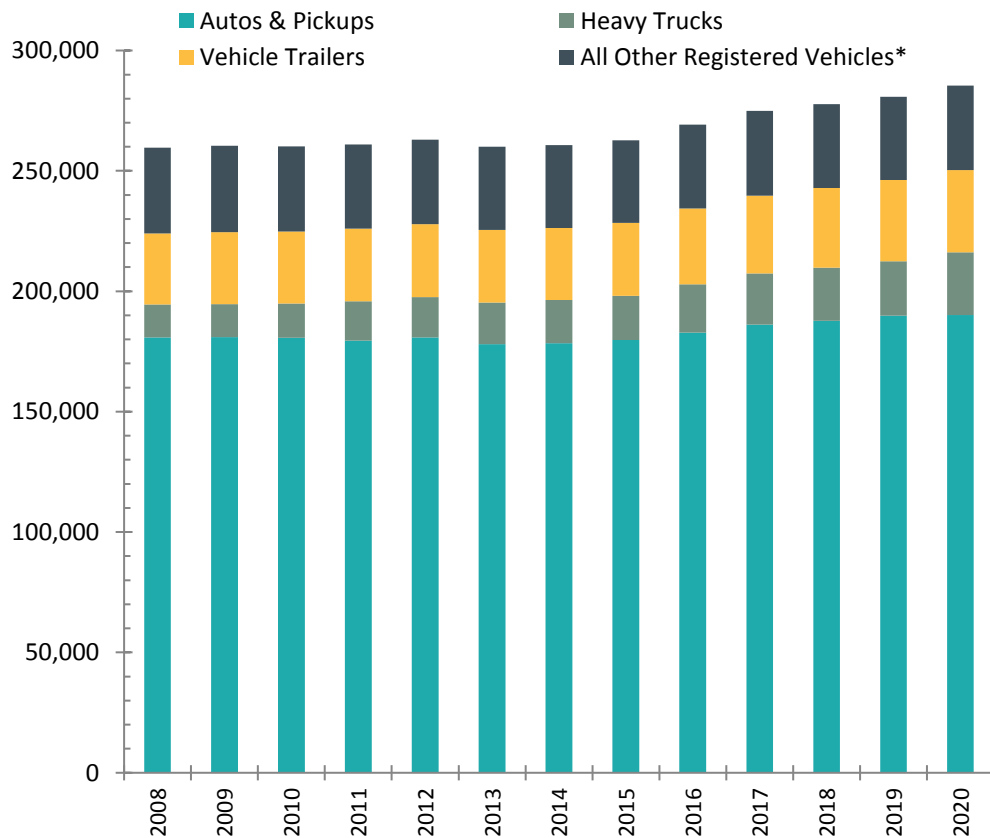
Trend: Total registered vehicles increased 9.7% from 2010 to 2020, by an average of 0.8% per year. Autos and pickups account for 67% of total registrations.

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
2020	190,073	26,148	34,124	35,088	285,433

* 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

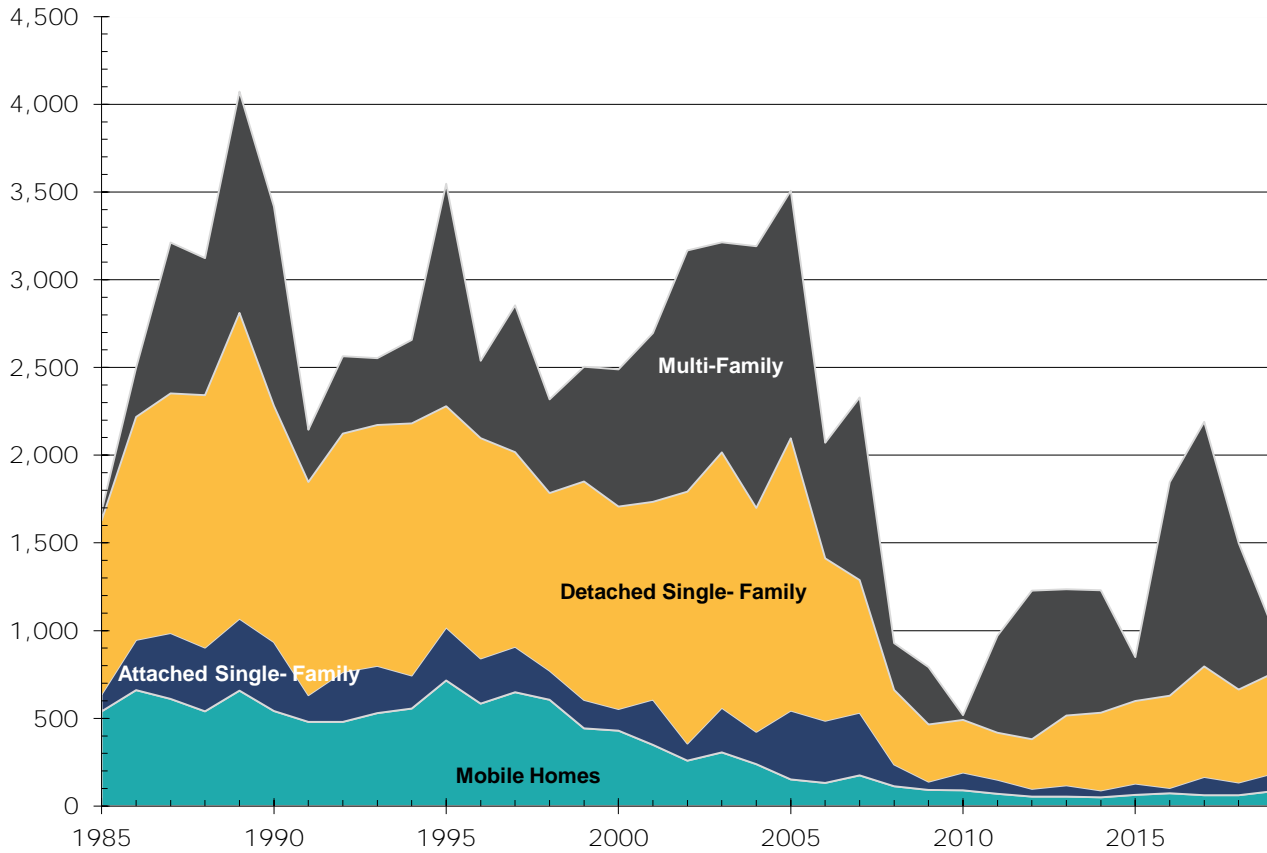
Trend: There were 571 permits issued for new single-family (detached and attached) homes in 2019, giving an average of around 510 units built per year in the 2010s, compared with the annual average of 1,260 new single-family construction permits issued per year in the 2000s, 1,500 per year in the 1990s, and 1,650 per year in the 1980s. Multi-family new construction permits in 2019 included Arbor Trace at Canopy and Arbor Landing at Lake Jackson.

Year	Detached Single-Family	Attached Single-Family	Multi-Family	Constructed Units Permitted	Mobile Homes*	Total Housing Units Permitted	Total Units Permitted, Yearly % Change
1985	992	97	54	1,143	540	1,683	
1986	1,271	286	280	1,837	661	2,498	48.4%
1987	1,366	375	860	2,601	611	3,212	28.6%
1988	1,439	363	781	2,583	540	3,123	-2.8%
1989	1,743	410	1,261	3,414	658	4,072	30.4%
1990	1,346	393	1,136	2,875	542	3,417	-16.1%
1991	1,215	152	298	1,665	480	2,145	-37.2%
1992	1,359	284	441	2,084	480	2,564	19.5%
1993	1,373	269	381	2,023	530	2,553	-0.4%
1994	1,437	188	476	2,101	556	2,657	4.1%
1995	1,261	302	1,268	2,831	716	3,547	33.5%
1996	1,256	257	441	1,954	584	2,538	-28.4%
1997	1,109	259	837	2,205	649	2,854	12.5%
1998	1,012	166	534	1,712	606	2,318	-18.8%
1999	1,245	162	654	2,061	443	2,504	8.0%
2000	1,154	123	782	2,059	430	2,489	-0.6%
2001	1,127	258	962	2,347	349	2,696	8.3%
2002	1,436	97	1,375	2,908	259	3,167	17.5%
2003	1,456	254	1,197	2,907	306	3,213	1.5%
2004	1,276	184	1,492	2,952	239	3,191	-0.7%
2005	1,552	392	1,411	3,355	152	3,507	9.9%
2006	926	354	659	1,939	132	2,071	-40.9%
2007	756	357	1,041	2,154	175	2,329	12.5%
2008	425	124	267	816	113	929	-60.1%
2009	326	47	327	700	92	792	-14.7%
2010	300	101	27	428	90	518	-34.6%
2011	268	80	553	901	70	971	87.5%
2012	283	44	847	1,174	54	1,228	26.5%
2013	398	64	720	1,182	54	1,236	0.7%
2014	443	39	698	1,180	50	1,230	-0.5%
2015	471	64	250	785	64	849	-31.0%
2016	526	30	1,217	1,773	73	1,846	117.4%
2017	630	104	1,394	2,128	62	2,190	18.6%
2018	530	72	835	1,437	62	1,499	-31.6%
2019	571	101	253	925	85	1,010	-32.6%

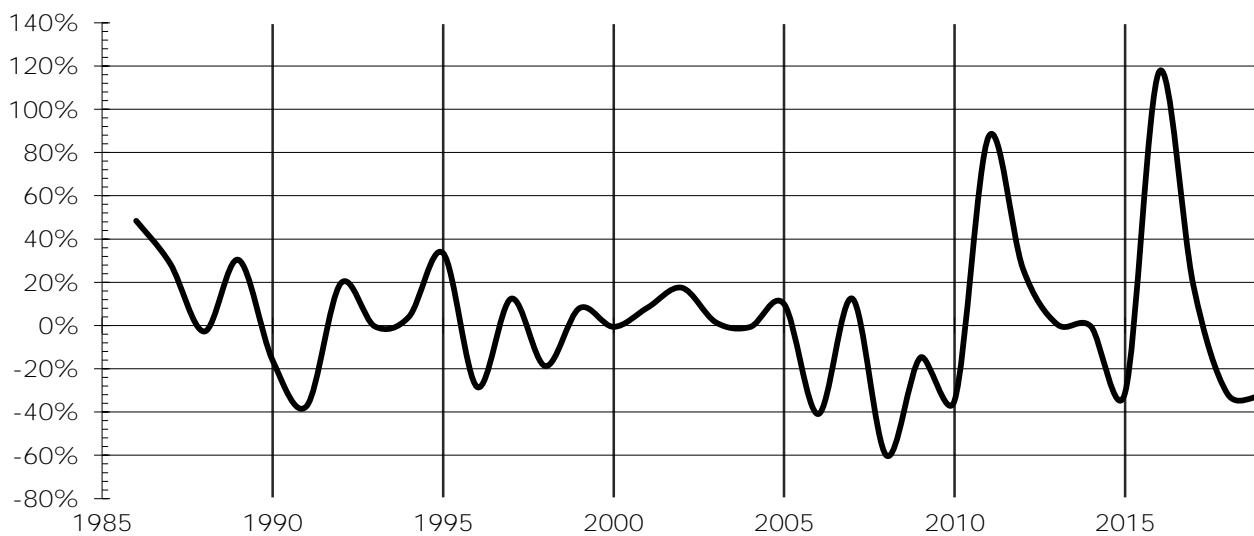
*Mobile home figures do not include permits issued within mobile home parks

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

Total Housing Units Permitted



Total Housing Units Permitted, Percent Change from Previous Year



Residential and Commercial Development

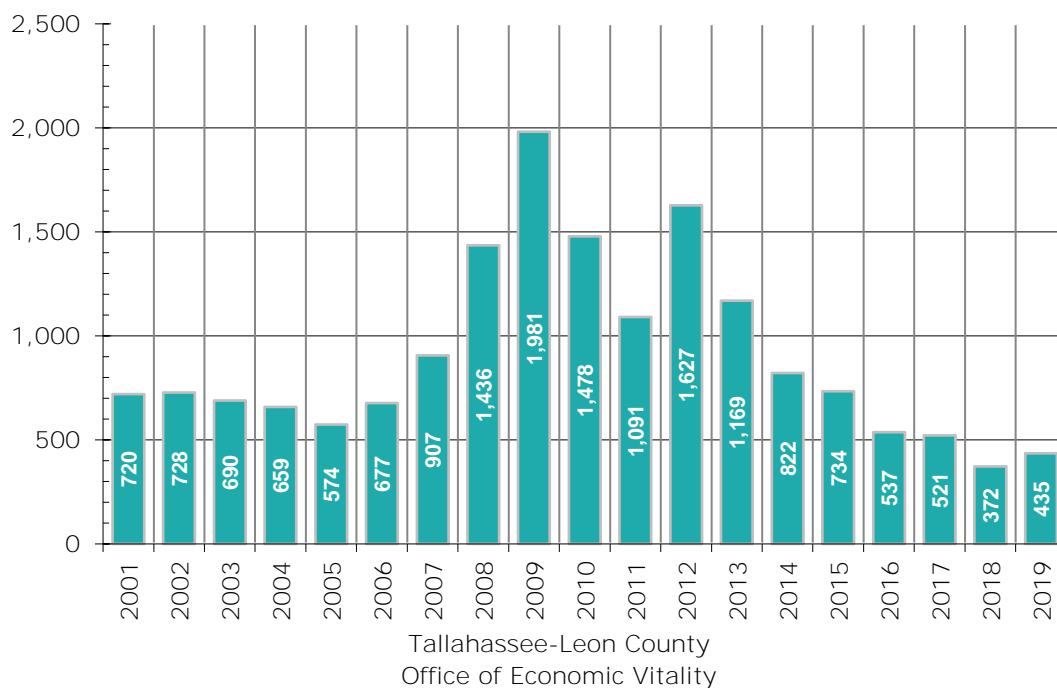
Mortgage Foreclosure Cases

Mortgage foreclosure cases increased by 17% in 2019 when compared to 2018, after six consecutive years of declining annual totals of mortgage foreclosure cases in Leon County.

Year	Foreclosure Cases	Change Over Previous Year
2001	720	
2002	728	1%
2003	690	-5%
2004	659	-4%
2005	574	-13%
2006	677	18%
2007	907	34%
2008	1,436	58%
2009	1,981	38%
2010	1,478	-25%
2011	1,091	-26%
2012	1,627	49%
2013	1,169	-28%
2014	822	-30%
2015	734	-11%
2016	537	-27%
2017	521	-3%
2018	372	-29%
2019	435	17%

Source: Leon County Clerk of Courts

Leon County Mortgage Foreclosure Cases





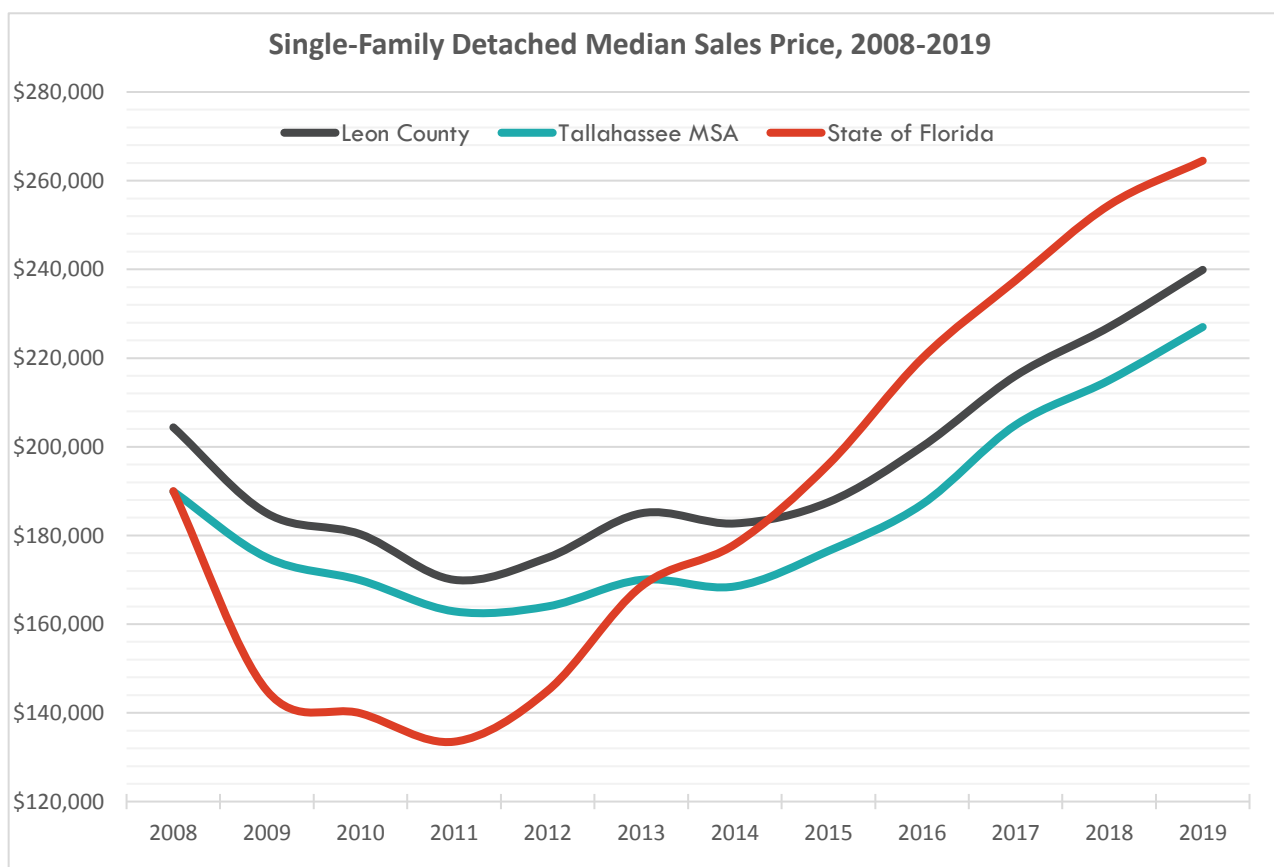
Residential and Commercial Development

Single-Family Detached Home Sales and Median Price

Trend: The median sales price for single family homes was up 5.7% in Leon County and 5.6% for the Tallahassee MSA in 2019 from 2018.

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
2019	3,340	\$239,900	4,274	\$227,000	293,325	\$264,500

Source: Tallahassee Board of Realtors MLS

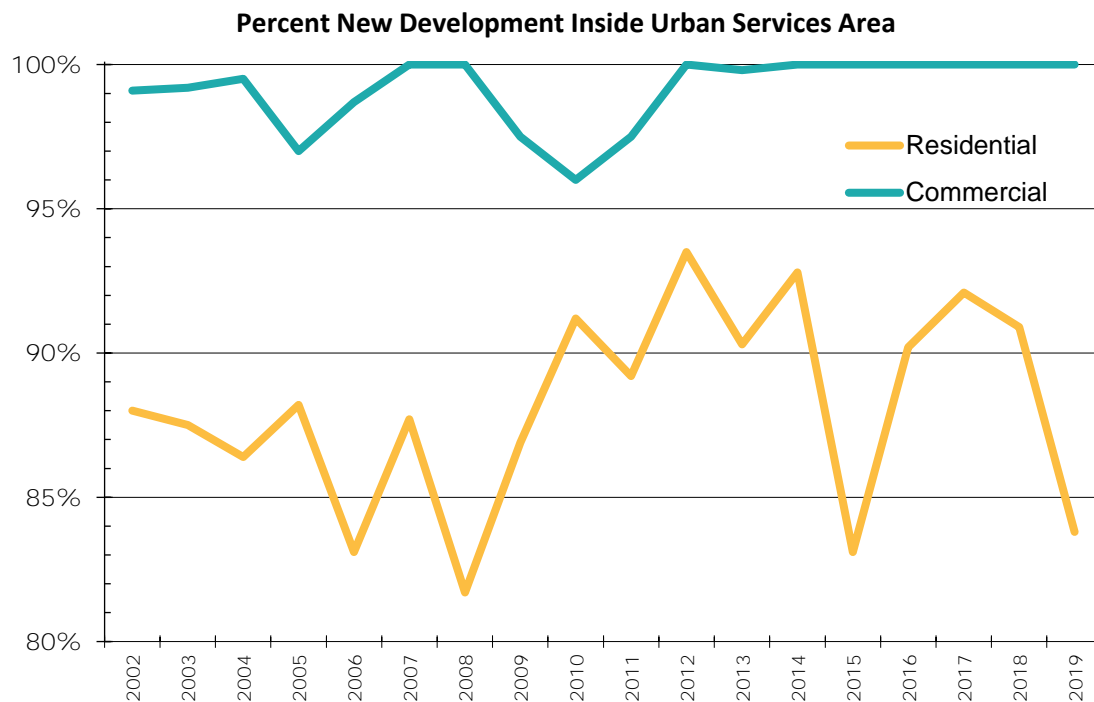


Trend: The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA). The location and size of the USA is based upon the area necessary to accommodate 90% of new residential dwelling units within the County by the Plan Horizon.

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	92.1%	100.0%
2018	90.9%	100.0%
2019	83.8%	100.0%

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

Sources: City of Tallahassee Growth Management Department, Leon County Department of Development Support & Environmental Management



Economic Factors

Residential and Commercial Development:

Food Service, Apartments, and Lodging Facilities

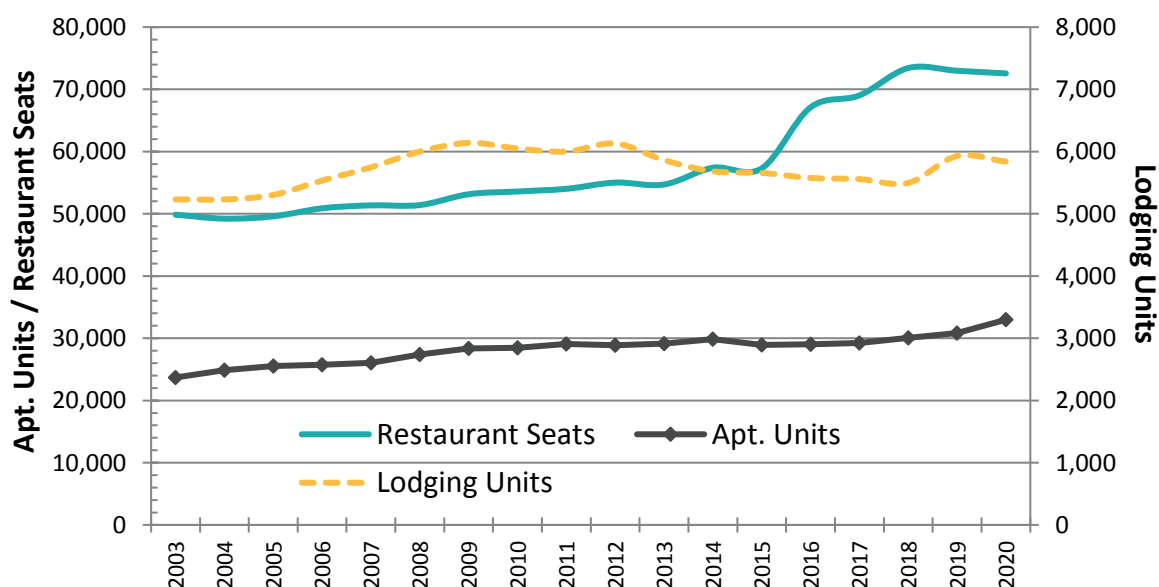
Trend: In the five years between 2015 and 2020, the total number of restaurant seats available in Leon County increased by 27%, apartment units increased 14%, and hotel and motel rooms and units available increased by around 3%.

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
2020	675	72,559	441	32,976	63	5,839

*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

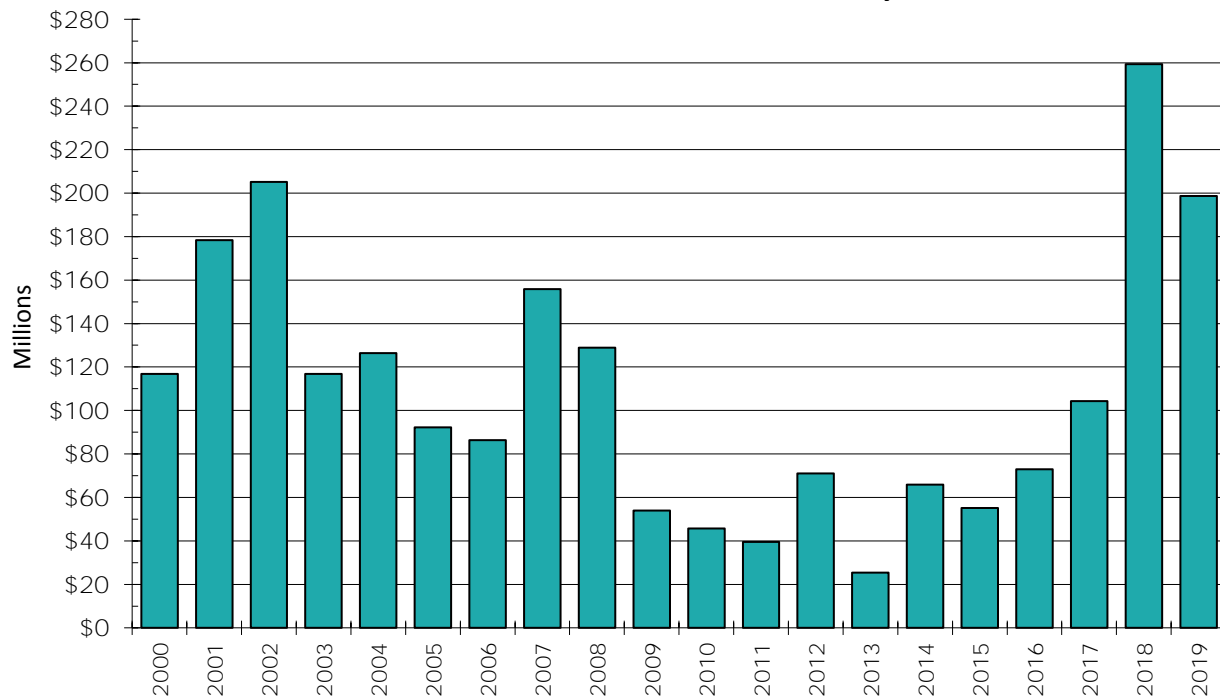


Trend: The value of commercial permits issued for new construction in 2019 totaled \$198.7 million. Adjusted for inflation, total commercial permit value in the past five years was \$690 million, while total inflation-adjusted commercial permit value in the prior ten years totaled \$938 million.

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2019 Dollars (\$Millions)
2000	119	\$78.7	\$116.8
2001	140	\$123.5	\$178.4
2002	129	\$144.3	\$205.2
2003	104	\$84.1	\$116.8
2004	106	\$93.4	\$126.4
2005	98	\$70.5	\$92.3
2006	109	\$68.0	\$86.3
2007	83	\$126.4	\$155.9
2008	88	\$108.5	\$128.9
2009	48	\$45.2	\$53.9
2010	30	\$39.0	\$45.7
2011	26	\$34.7	\$39.5
2012	54	\$63.7	\$71.0
2013	25	\$23.1	\$25.4
2014	39	\$60.9	\$65.8
2015	40	\$51.1	\$55.1
2016	55	\$68.5	\$72.9
2017	88	\$100.0	\$104.3
2018	67	\$254.8	\$259.4
2019	55	\$198.7	\$198.7

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 2019 dollars





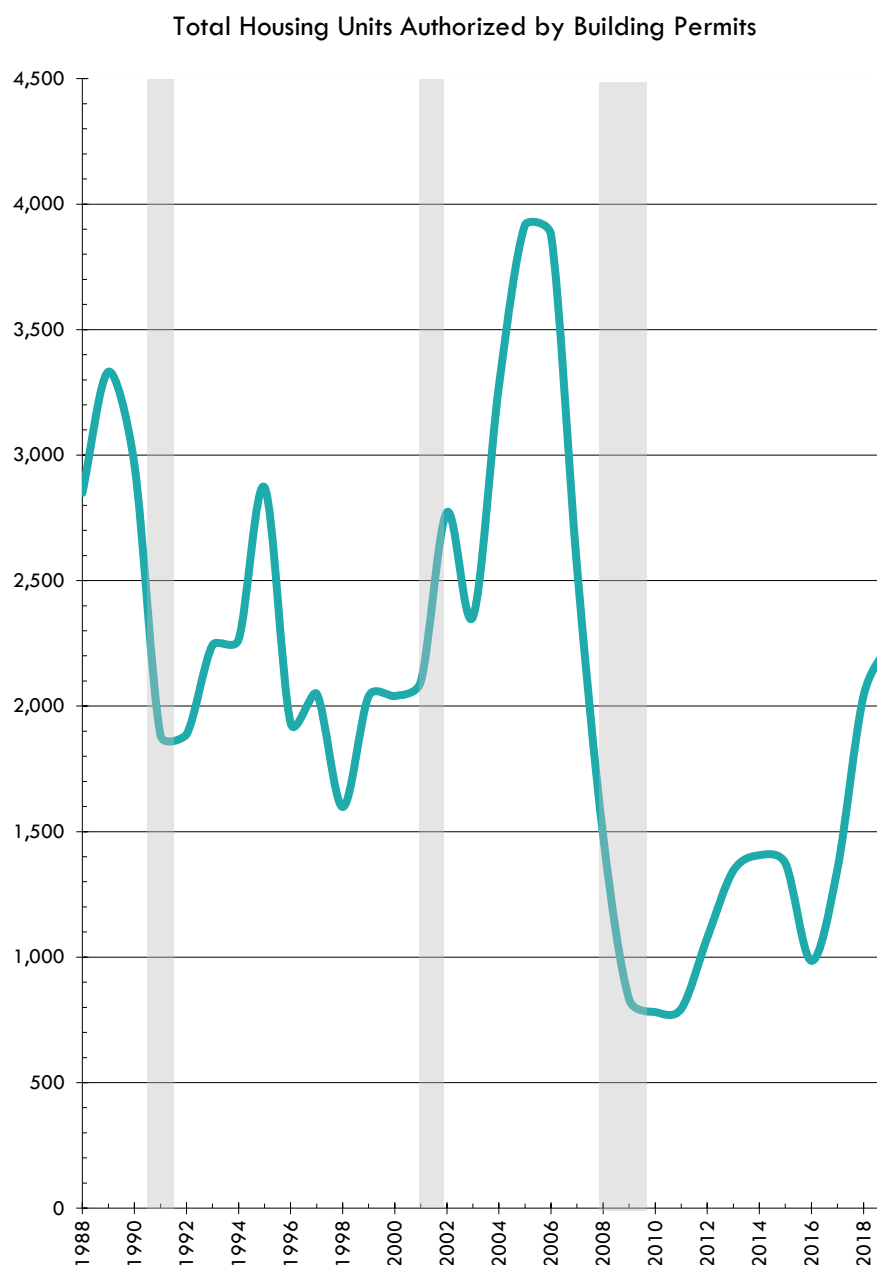
Residential and Commercial Development

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 2,173 housing units authorized by permits each year. The annual average increased in the 2000s to 2,520 per year, including the 3,917 units authorized in the peak year of 2005. The annual average in the 2010s was 1,340, or 53% of the average during the 2000s and 49% of the annual average of the 1990s.

Year	Units Authorized by Building Permits
1988	2,849
1989	3,332
1990	2,962
1991	1,885
1992	1,887
1993	2,243
1994	2,265
1995	2,871
1996	1,932
1997	2,049
1998	1,598
1999	2,040
2000	2,040
2001	2,098
2002	2,772
2003	2,355
2004	3,276
2005	3,917
2006	3,877
2007	2,552
2008	1,485
2009	832
2010	781
2011	794
2012	1,077
2013	1,344
2014	1,406
2015	1,374
2016	985
2017	1,351
2018	2,040
2019	2,248



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

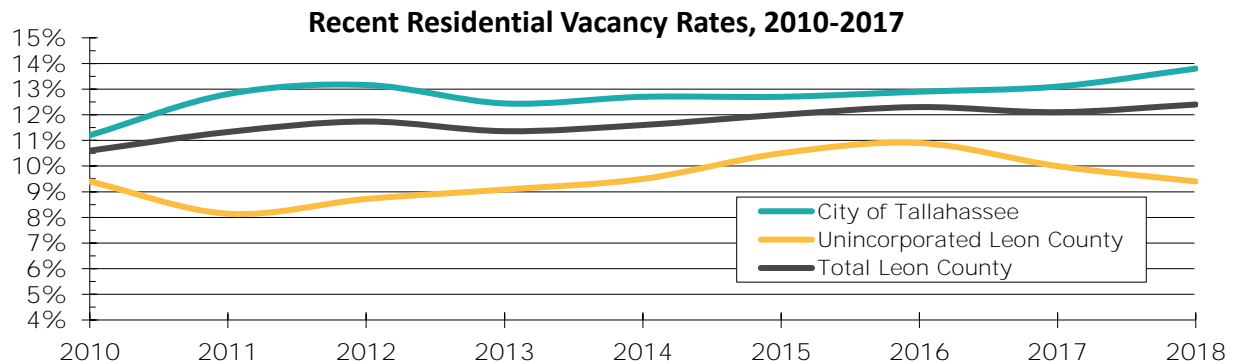
Source: U.S. Bureau of the Census (retrieved by FRED, Federal Reserve Bank of St. Louis).

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

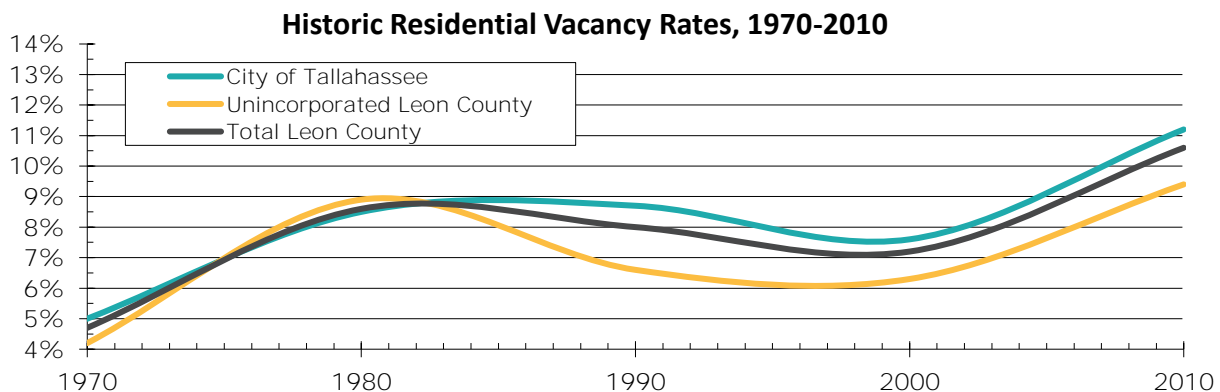
Year	City of Tallahassee	Unincorporated Leon County	Total Leon County
2010	11.2%	9.4%	10.6%
2011	12.8%	8.1%	11.3%
2012	13.2%	8.7%	11.7%
2013	12.4%	9.1%	11.4%
2014	12.7%	9.5%	11.6%
2015	12.7%	10.5%	12.0%
2016	12.9%	10.9%	12.3%
2017	13.1%	10.0%	12.1%
2018	13.8%	9.4%	12.4%



Source: U.S. Department of Commerce, Bureau of the Census, 2010 Decennial Census, 5-Year American Community Survey, 2011 to 2018.

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

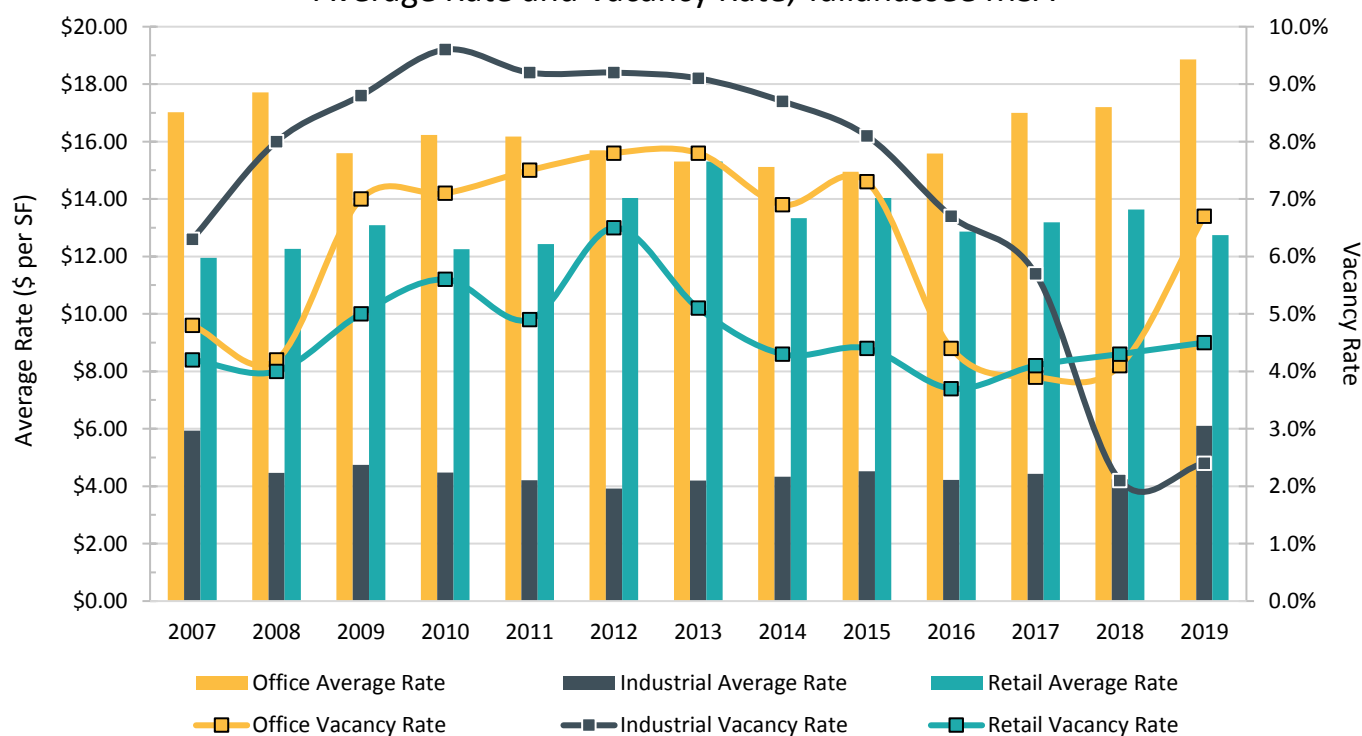
Trend: Since 2007, lease rates for Office uses have averaged \$16.34 per SF, with an average annual vacancy rate of 6.1%. Industrial uses lease and vacancy rates averaged \$4.60 and 7.2%, respectively; Retail uses, \$13.16 and 4.7%.

Year	Office Average Rate	Office Vacancy Rate	Industrial Average Rate	Industrial Vacancy Rate	Retail Average Rate	Retail Vacancy Rate
2007	\$17.02	4.8%	\$5.94	6.3%	\$11.95	4.2%
2008	\$17.71	4.2%	\$4.47	8.0%	\$12.26	4.0%
2009	\$15.59	7.0%	\$4.74	8.8%	\$13.09	5.0%
2010	\$16.23	7.1%	\$4.48	9.6%	\$12.25	5.6%
2011	\$16.18	7.5%	\$4.21	9.2%	\$12.43	4.9%
2012	\$15.69	7.8%	\$3.92	9.2%	\$14.04	6.5%
2013	\$15.30	7.8%	\$4.20	9.1%	\$15.31	5.1%
2014	\$15.12	6.9%	\$4.33	8.7%	\$13.33	4.3%
2015	\$14.95	7.3%	\$4.52	8.1%	\$14.04	4.4%
2016	\$15.58	4.4%	\$4.22	6.7%	\$12.87	3.7%
2017	\$17.00	3.9%	\$4.43	5.7%	\$13.19	4.1%
2018	\$17.20	4.1%	\$4.24	2.1%	\$13.63	4.3%
2019	\$18.86	6.7%	\$6.10	2.4%	\$12.74	4.5%

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*

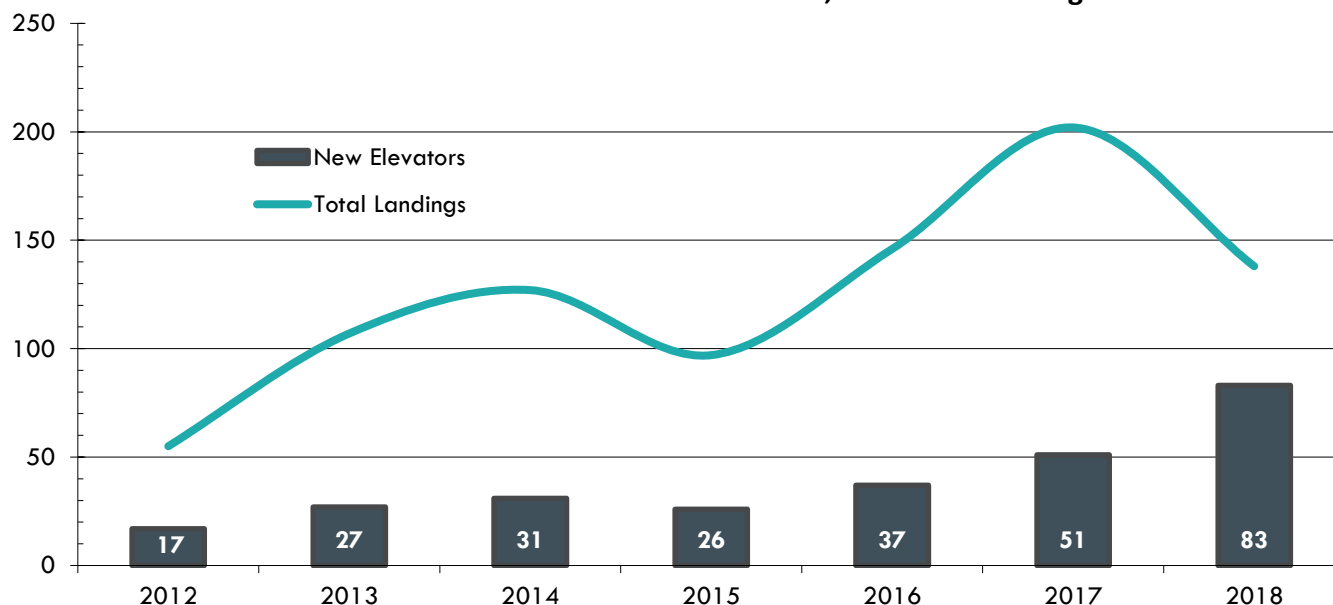
Trend: Measuring how many new elevators have been installed each year helps in the overall assessment of development and redevelopment. It gives a basic approximation for intensity of commercial and institutional development, and also is an indicator of dense residential development.

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:

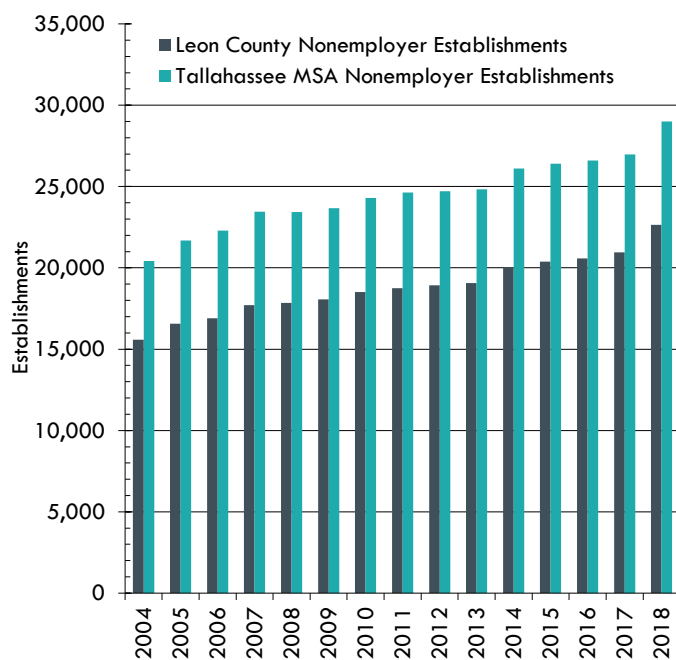
Nonemployer Statistics

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.

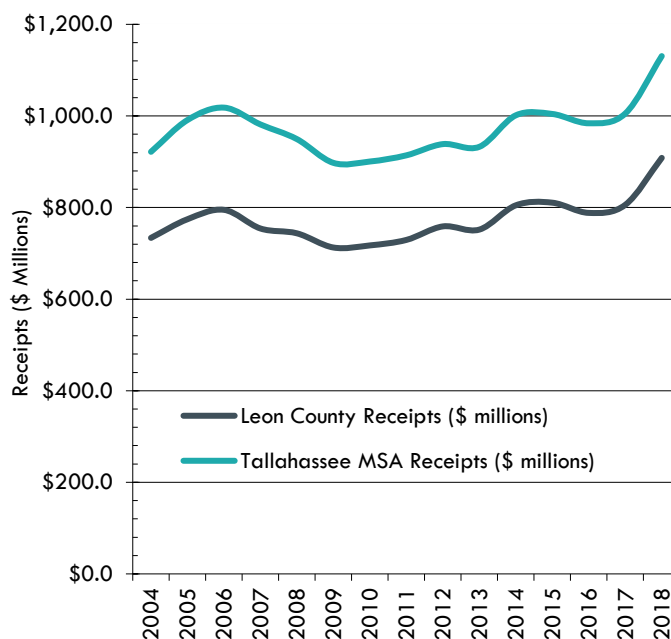
Year	Leon County Nonemployer Establishments	Leon County Receipts (\$ millions)	Tallahassee MSA Nonemployer Establishments	Tallahassee MSA Receipts (\$ millions)
2004	15,575	\$733.7	20,430	\$921.7
2005	16,568	\$774.5	21,683	\$991.1
2006	16,898	\$795.0	22,291	\$1,018.2
2007	17,700	\$754.2	23,452	\$981.4
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
2018	22,644	\$908.4	29,009	\$1,130.7

Source: U.S. Census Bureau, Nonemployer Statistics

Nonemployer Establishments, 2004-2018



Nonemployer Receipts, 2004-2018





Economic Factors

Innovation:

SBIR/STTR Grants

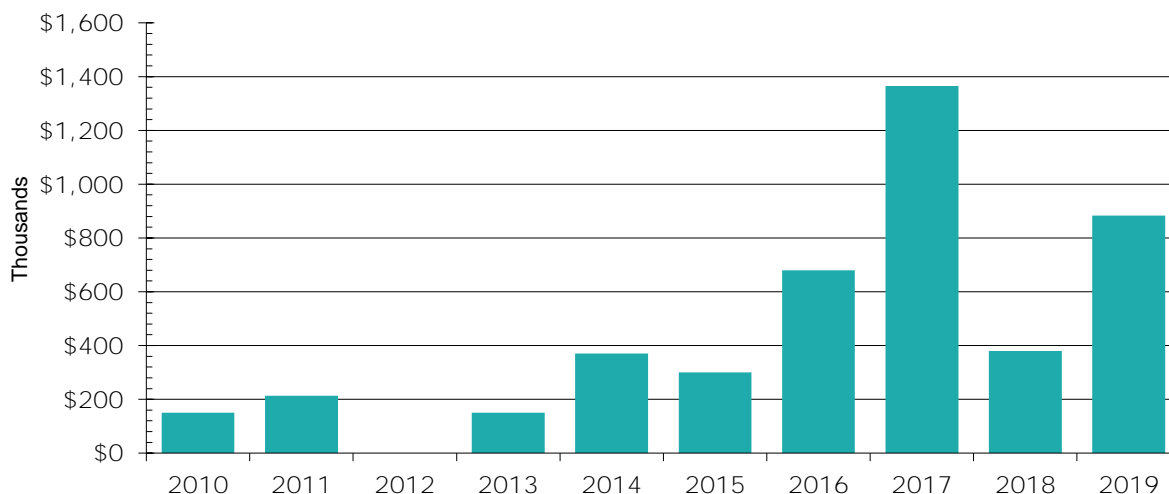
Trend: Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) are federal programs encouraging domestic small businesses to engage in research and development with potential for commercialization. Through competitive awards, SBIR and STTR help small businesses explore their technological potential and give incentive to profit from commercialization. Since 2010, Leon County firms have been awarded nearly \$4.5 million, with 48% coming from the National Science Foundation and 42% from the Department of Energy.

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
2019	\$883,247
2010-19	\$4,492,152

Awarding Agency	Percent Awards, 2010-2019
National Science Foundation	48.3%
Department of Energy	42.1%
Department of Defense	4.9%
Department of Health and Human Services	4.7%
Total	100.0%

Source: Small Business Innovation Research

SBIR/STTR Grant Awards, 2010-2019



Prior SBIR/STTR Awards	
Decade	Total Award Amount
1980s	\$294,685
1990s	\$1,038,105
2000s	\$5,106,704
2010s	\$4,492,152

Economic Factors

Innovation:

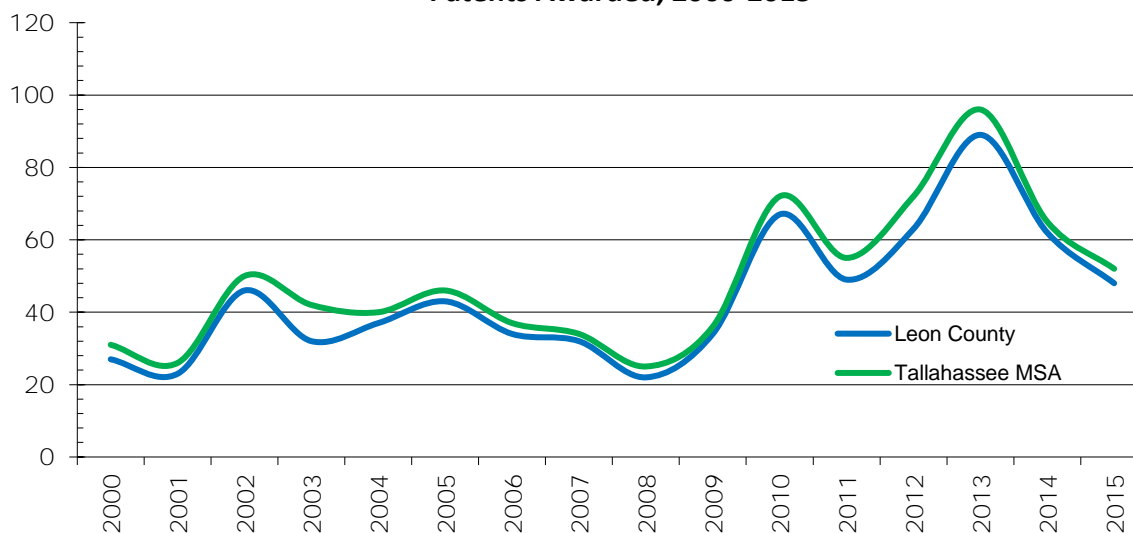
Patents Awarded Locally

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



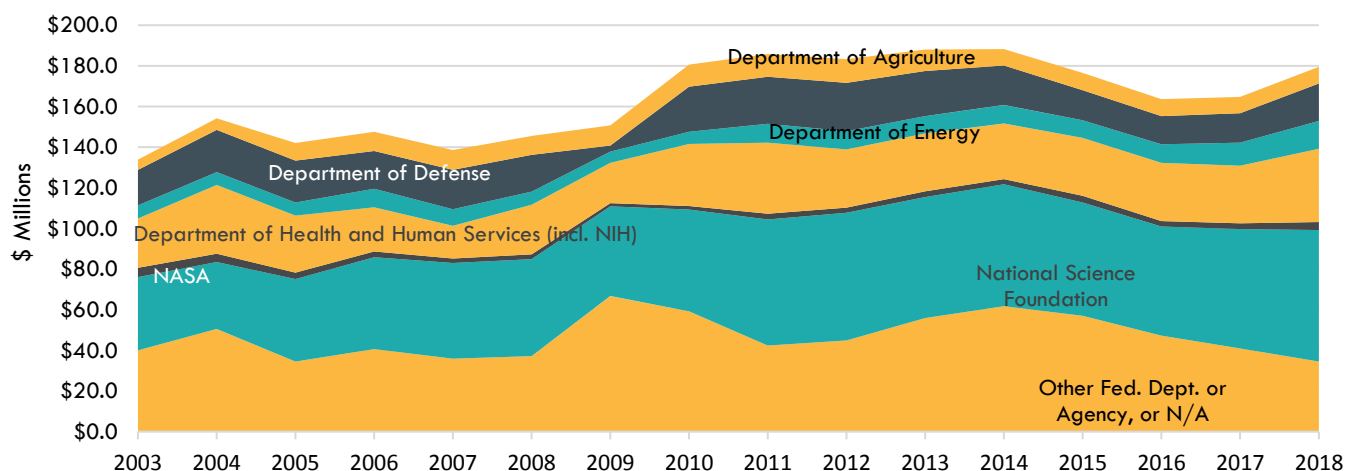
Federally Financed R&D and Total R&D Expenditures at FSU & FAMU (\$ Millions)

Trend: Between 2014 and 2018, federally financed R&D expenditures at FSU and FAMU in all fields averaged around \$174.6 million per year. R&D expenditures for the National Science Foundation at FSU and FAMU accounted for an average of 34% of the total; Health and Human Services, 17%. During 2014-2018, federally financed R&D accounted for 55% of total R&D expenditures at FSU and FAMU. Total R&D expenditures increased by an average of 3.1% 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
2018	\$8.24	\$18.48	\$13.61	\$36.08	\$3.96	\$64.74	\$34.49	\$179.61	\$337.34

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)

