



315 S. Calhoun St., Suite 110
Tallahassee, FL 32301

850-219-1080
oevforbusiness.org

DATA DIGEST 2021

CONTENTS

Demographics

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

Workforce and Income

Employment.....	13
Unemployment Rate (Annual Average).....	14
Initial Claims for Unemployment Compensation.....	16
Average Annual Employment & Wages by Ownership.....	17
Average Annual Employment & Wages of Private Industries.....	18
Median Family Income.....	19
Educational Attainment.....	20
Employment by Industry (Non-Agricultural).....	21
State Government Employees in Tallahassee MSA.....	23
Fastest Growing Occupations.....	24
Occupations Gaining the Most New Jobs.....	25
Fastest Growing Industries.....	26
Per Capita Personal Income.....	27
FSU & FAMU Recent Graduates Employed in Leon County.....	28
Labor Force.....	29
Job Creation and Destruction in Tallahassee MSA.....	30
Occupational Employment and Wages.....	32
Major Employers.....	34
Non-profit Organizations.....	36
Professional Engineers in Tallahassee MSA.....	38
Certified Public Accountants in Tallahassee MSA.....	39

Economic Factors

Gross Domestic Product by Metro. Area.....	40
Productivity (GDP per Employee).....	41
Exports from Tallahassee MSA.....	43
Tallahassee International Airport Total Passengers.....	44
Total Air Freight at TLH.....	45

Leon County Tourism	46
Tourist Development Tax Receipts, Tallahassee MSA	48
Annual Taxable Sales, Change from Previous Year	49
Annual Taxable Sales, by Category	50
Consumer Price Index (CPI-U)	51
FDIC Summary of Deposits	52
Cost of Living Index	53
Florida Price Level Index	54
Regional Price Parities for Tallahassee MSA	55
Total Quantity Indexes for Real GDP	56
Homestead Exemption in Leon County	57

Education

Higher Education Institutions: Enrollment	59
Higher Education Institutions: Enrollment by Level and Full-Time Status	61
Higher Education: Degrees Conferred	63
Public School Enrollment	65
Public School Graduation Rate	66
Leon County Public School Grades	67
Higher Education: Graduation Rate	69
Financial Aid Received by Undergraduate Students	70
Tallahassee MSA Contributions from Florida Lottery	71

Community and Environment

Electric Service Points	73
Health Resource Availability	74
Crime Index for Tallahassee MSA	76
Public Safety: Leon County Crime Rate	78
Public Safety: Campus Crime Rate	80
Property Tax Rate	81
Climatic Data	82
Agriculture in Tallahassee MSA	83
Homeownership Rate in Tallahassee MSA	85
Motor Vehicle Crashes in Leon County	86
Vehicle Registrations in Leon County	87

Residential and Commercial Development

Residential Development	88
Mortgage Foreclosure Cases	90
Single Family Home Sales and Median Price	91
Urban Service Area Development	92
Food Service and Lodging Facilities	93
Commercial Development	94
Housing Units Authorized in Tallahassee MSA	95
Residential Vacancy Rates	96
Office, Industrial, and Retail Market Statistics for Tallahassee Metro Area	97
Student & Multifamily Housing Market Statistics for Tallahassee Metro Area	98
New Elevators in Leon County	99

Innovation/Entrepreneurism

Nonemployer Statistics for Tallahassee MSA	100
SBIR/STTR Grants	101
Patents Awarded in Leon County	102
Total R&D Expenditures at FAMU & FSU	103

Demographics

Population:

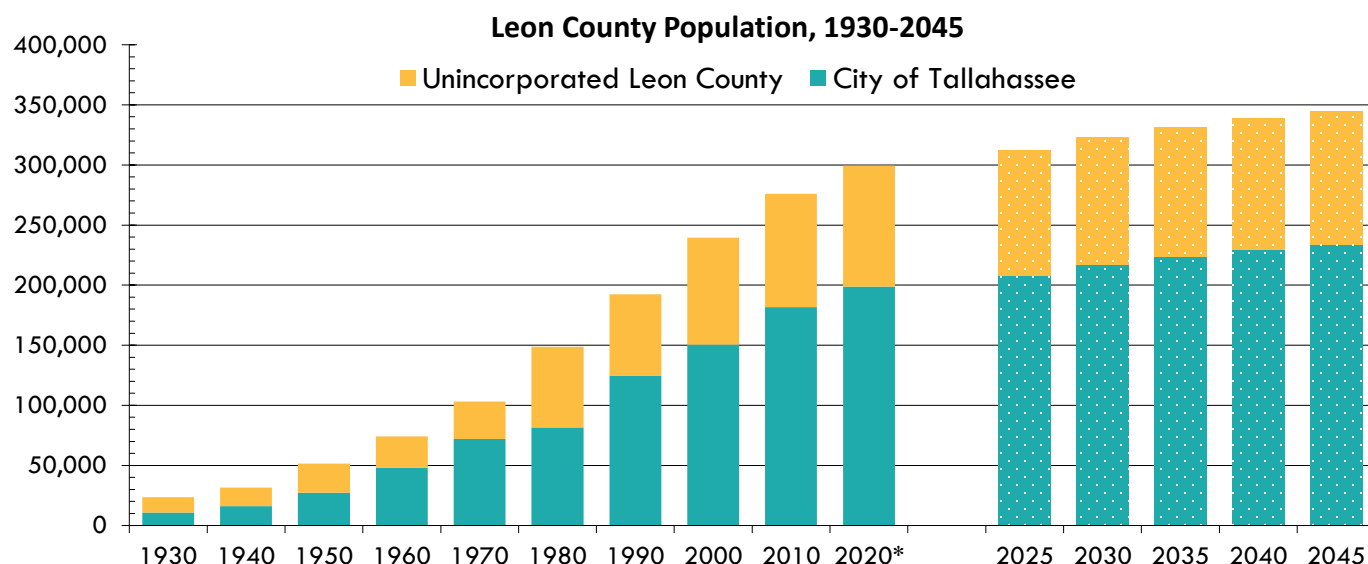
Estimates and Projections

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
2020*	198,627	100,857	299,484
2025	208,300	104,000	312,300
2030	216,900	106,100	323,000
2035	223,600	107,800	331,400
2040	229,300	109,200	338,500
2045	234,200	110,400	344,600

*Estimate

Sources: University of Florida, Bureau of Economic and Business Research (2025-2045 Leon County projections); Tallahassee-Leon County Office of Economic Vitality (City of Tallahassee and Unincorporated Leon County 2025-2045) projections assuming continued annexations and share of population growth captured by the City between 2000 and 2020 will continue throughout the projected time horizon).



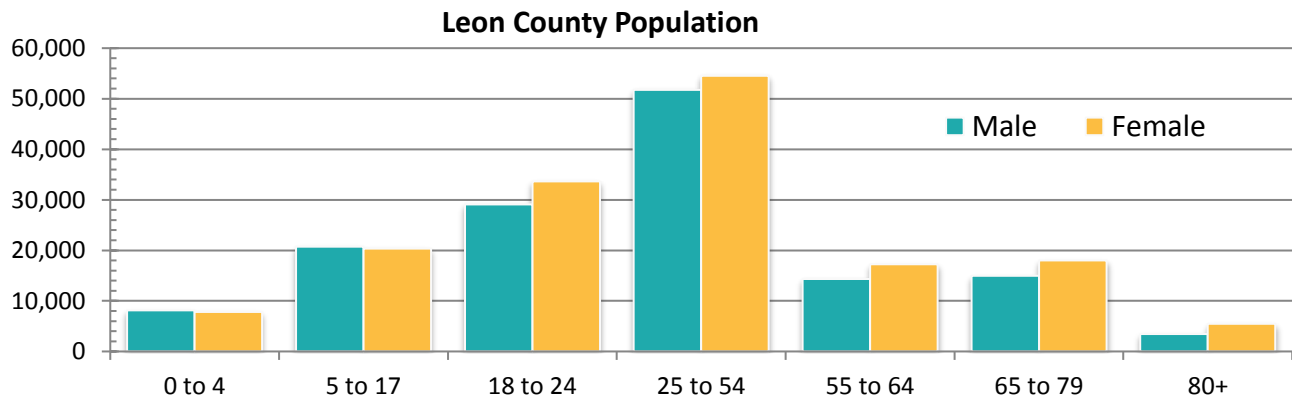


Demographics

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 14% (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	15,983	5.3%	7,832	2.6%	8,151	2.7%
5 to 17	41,099	13.7%	20,372	6.8%	20,727	6.9%
18 to 24	62,686	20.9%	33,626	11.2%	29,060	9.7%
25 to 54	106,298	35.5%	54,547	18.2%	51,751	17.3%
55 to 64	31,569	10.5%	17,227	5.8%	14,342	4.8%
65 to 79	32,917	11.0%	17,979	6.0%	14,938	5.0%
80+	8,932	3.0%	5,463	1.8%	3,469	1.2%
Total	299,484	100.0%	157,046	52.4%	142,438	47.6%



Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 190", June 2021

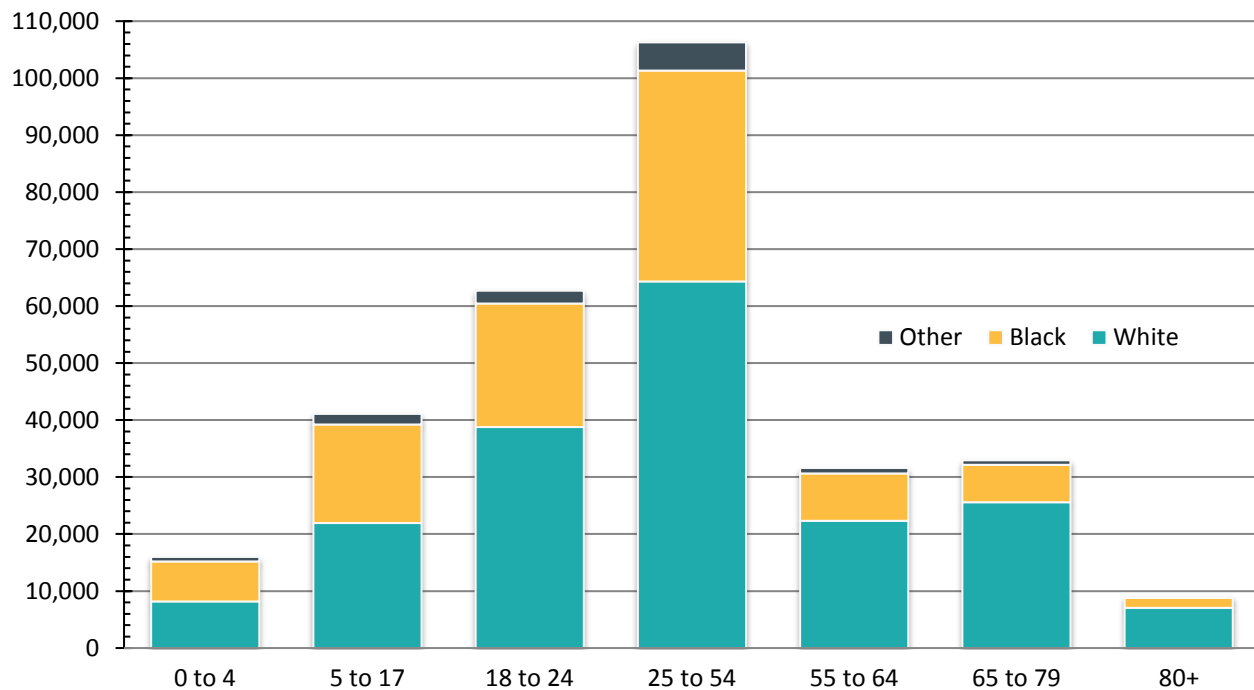
Trend: By race and ethnicity, Leon County's population includes 62.9% White, 33.3% Black, and 3.9% Other Races. Also, 6.6% of Leon County residents are of Hispanic origin.

Age Group	All Races	White	Black	Other	Hispanic Origin*
0 to 4	15,983	8,197	7,012	774	1,151
5 to 17	41,099	21,912	17,319	1,868	3,230
18 to 24	62,686	38,802	21,660	2,224	5,905
25 to 54	106,298	64,352	37,002	4,944	6,738
55 to 64	31,569	22,327	8,302	940	1,349
65 to 79	32,917	25,607	6,576	734	1,050
80+	8,932	7,031	1,756	145	260
Total	299,484	188,228	99,627	11,629	19,683

*"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 190, June 2021"

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, 50.5% 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 (2010-2020)	23,997	26,672	2,794,736
Net Natural Increase	12,128	13,305	299,418
Births	30,294	40,389	2,190,197
Deaths	18,166	27,084	1,890,779
Net Migration	11,869	13,367	2,495,318
Percent due to Natural Increase	50.5%	49.9%	10.7%
Percent due to Net Migration	49.5%	50.1%	89.3%

Source: University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2020



Demographics

Population:

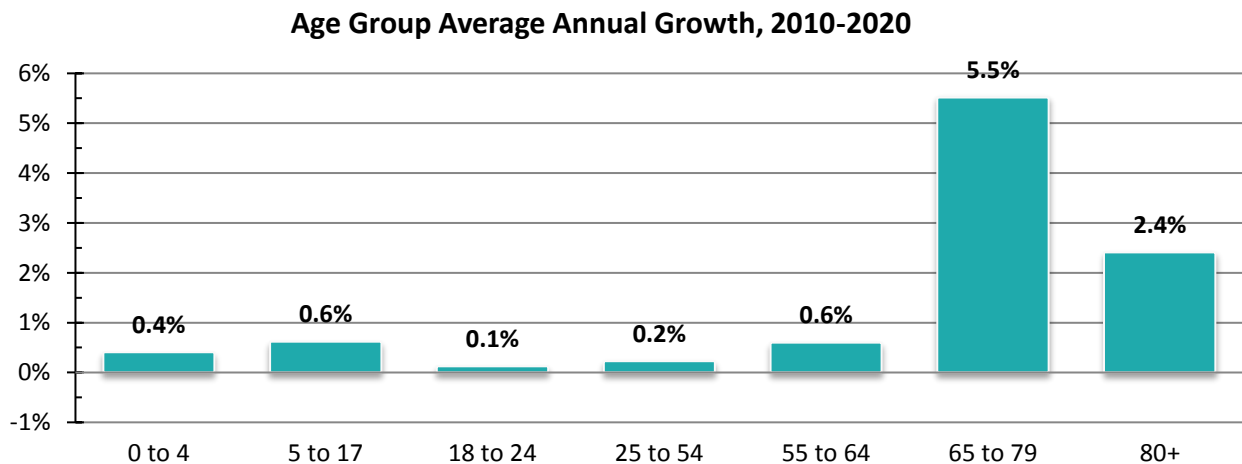
Growth by Age Group

Trend: Although the 65-79 age group represents 11% of Leon County's total population, it is the fastest growing age group, growing at an annual rate of 5.5% per year during 2010-2020.

Age Group	2010 Population	2020 Population Estimate	Growth in Population 2010-2020	Percent Growth 2010-2020	Avg. Ann. Growth 2010-2020
0 to 4	15,350	15,983	633	4.0%	0.4%
5 to 17	38,623	41,099	2,476	6.2%	0.6%
18 to 24	61,897	62,686	789	1.3%	0.1%
25 to 54	103,907	106,298	2,391	2.3%	0.2%
55 to 64	29,730	31,569	1,839	6.0%	0.6%
65 to 79	18,962	32,917	13,955	55.2%	5.5%
80+	7,018	8,932	1,914	24.1%	2.4%
Total	275,487	299,484	23,997	8.4%	0.8%

Age Dependency Ratio* **40.9** **49.3**

*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 190", June 2021



Demographics

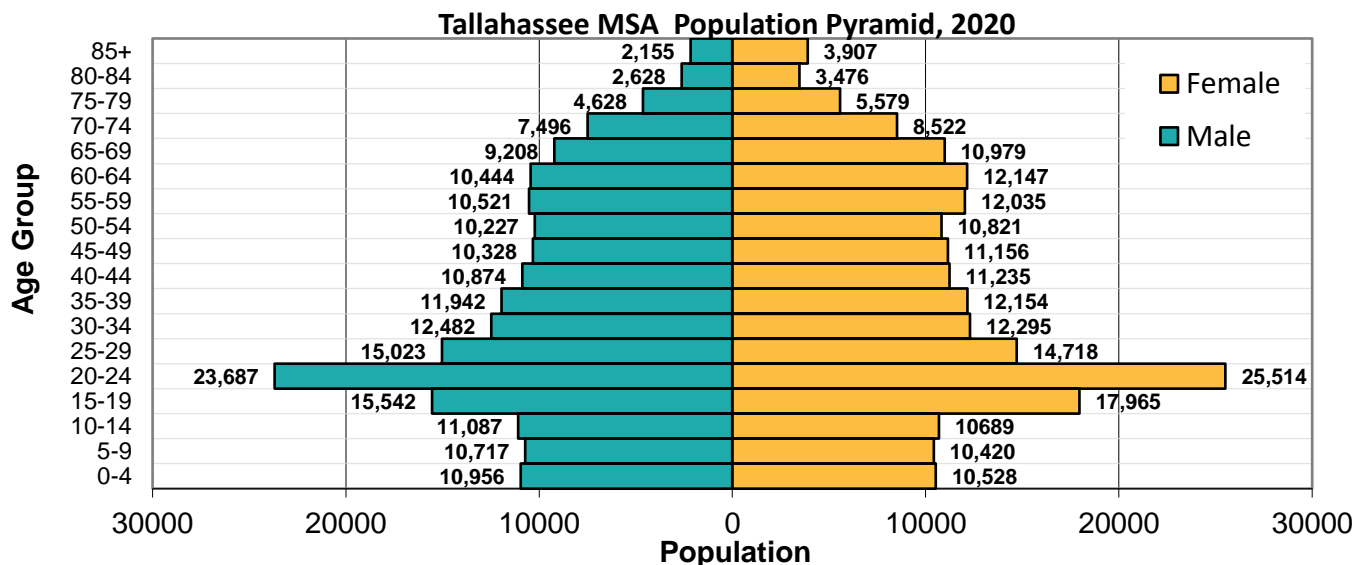
Population:

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 48% of the population; minors and college-age (24 and younger), 37%; and those 65 and older, 15%.

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	21,484	5.5%	10,528	2.7%	10,956	2.8%
5 to 9	21,137	5.4%	10,420	2.6%	10,717	2.7%
10 to 14	21,776	5.5%	10,689	2.7%	11,087	2.8%
15 to 19	33,507	8.5%	17,965	4.6%	15,542	3.9%
20 to 24	49,201	12.5%	25,514	6.5%	23,687	6.0%
25 to 29	29,741	7.5%	14,718	3.7%	15,023	3.8%
30 to 34	24,777	6.3%	12,295	3.1%	12,482	3.2%
35 to 39	24,096	6.1%	12,154	3.1%	11,942	3.0%
40 to 44	22,109	5.6%	11,235	2.9%	10,874	2.8%
45 to 49	21,484	5.5%	11,156	2.8%	10,328	2.6%
50 to 54	21,048	5.3%	10,821	2.7%	10,227	2.6%
55 to 59	22,556	5.7%	12,035	3.1%	10,521	2.7%
60 to 64	22,591	5.7%	12,147	3.1%	10,444	2.7%
65 to 69	20,187	5.1%	10,979	2.8%	9,208	2.3%
70 to 74	16,018	4.1%	8,522	2.2%	7,496	1.9%
75 to 79	10,207	2.6%	5,579	1.4%	4,628	1.2%
80 to 84	6,104	1.5%	3,476	0.9%	2,628	0.7%
85+	6,062	1.5%	3,907	1.0%	2,155	0.5%
Total	394,085	100.0%	204,140	51.8%	189,945	48.2%

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 190", June 2021





Demographics

Population: Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was estimated at 394,085 in 2020, up 7.3% 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)	2020 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2010-2020	Annual Growth Rate 2010-2020
All Metropolitan Areas	20,900,221	18,119,272	15,357,198	15.3%	0.1%
Miami-Fort Lauderdale-West Palm Beach (Broward, Miami-Dade, Palm Beach)	6,231,500	5,564,657	5,007,988	12.0%	1.1%
Tampa-St. Petersburg-Clearwater (Hernando, Hillsborough, Pasco, Pinellas)	3,197,637	2,783,243	2,396,013	14.9%	1.4%
Orlando-Kissimmee-Sanford (Lake, Orange, Osceola, Seminole)	2,645,784	2,134,411	1,644,563	24.0%	2.2%
Jacksonville (Baker, Clay, Duval, Nassau, St. Johns)	1,581,345	1,345,596	1,122,750	17.5%	1.6%
North Port-Sarasota-Bradenton (Manatee, Sarasota)	837,319	702,281	589,963	19.2%	1.8%
Cape Coral-Fort Myers (Lee)	750,493	618,754	440,888	21.3%	1.9%
Lakeland-Winter Haven (Polk)	715,090	602,095	483,924	18.8%	1.7%
Deltona-Daytona Beach-Ormond Beach (Volusia, Flagler)	649,398	590,289	493,175	10.0%	1.0%
Palm Bay-Melbourne-Titusville (Brevard)	606,671	543,376	476,230	11.6%	1.1%
Pensacola-Ferry Pass-Brent (Escambia, Santa Rosa)	500,188	448,991	412,153	11.4%	1.1%
Port St. Lucie (Martin, St. Lucie)	483,566	424,107	319,426	14.0%	1.3%
Tallahassee (Gadsden, Jefferson, Leon, Wakulla)	394,085	367,413	320,304	7.3%	0.7%
Naples-Immokalee-Marco Island (Collier)	387,450	321,520	251,377	20.5%	1.9%
Ocala (Marion)	368,135	331,303	258,916	11.1%	1.1%
Gainesville (Alachua, Gilchrist)	331,556	305,076	266,842	8.7%	0.8%



Demographics

Population:

Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was estimated at 394,085 in 2020, up 7.3% 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)	2020 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2010-2020	Annual Growth Rate 2010-2020
Crestview-Fort Walton Beach-Destin (Okaloosa, Walton)	278,675	235,865	211,099	18.2%	1.7%
Punta Gorda (Charlotte)	187,904	159,978	141,627	17.5%	1.6%
Panama City (Bay)	174,410	168,852	148,217	3.3%	0.3%
Sebastian-Vero Beach (Indian River)	158,834	138,028	112,947	15.1%	1.4%
Homosassa Springs (Citrus)	149,383	141,236	118,085	5.8%	0.6%
The Villages (Sumter)	141,422	93,420	53,345	51.4%	4.2%
Sebring (Highlands)	104,834	98,786	87,366	6.1%	0.6%

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, 2020

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, 2020		Census April 1, 2010		Census April 1, 2000	
	Households	Average Household Size	Households	Average Household Size	Households	Average Household Size
Leon County	122,132	2.32	110,945	2.35	96,521	2.34
Florida	8,589,056	2.46	7,420,802	2.48	6,338,075	2.46

Households by Type

	Families	Living Alone	Other Non-Families
Leon County	54%	31%	15%
City of Tallahassee	46%	35%	19%
Unincorporated Area	72%	24%	5%
Florida	65%	29%	6%

Sources: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 188", December 2020;
U.S. Department of Commerce, Bureau of the Census, 2019 5-Year American Community Survey, Table S2501

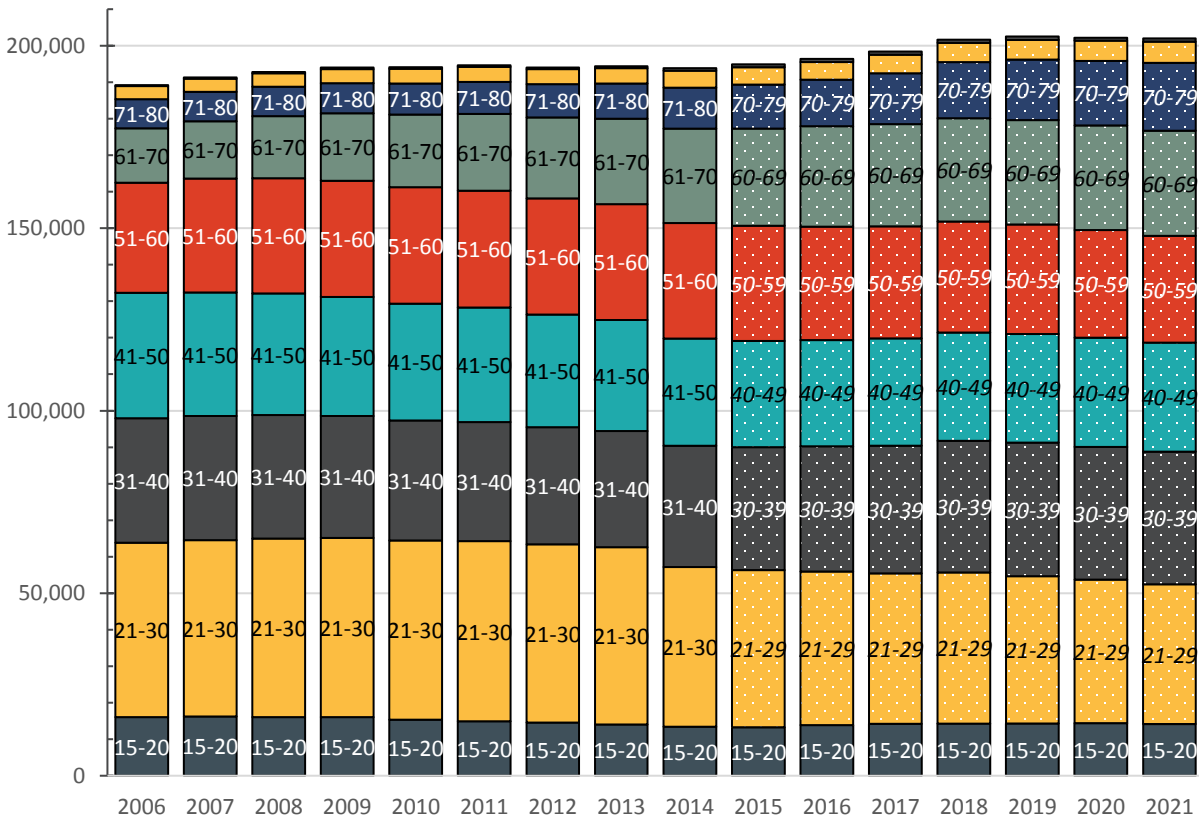
Trend: Between 2011 and 2021, the proportion of drivers licensed in Leon County age 60 or older increased from 18% to 27%, while the proportion age 30 or younger decreased from 33% to 26%.

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
2021	14,172	<i>38,279</i>	<i>36,334</i>	<i>29,869</i>	<i>29,260</i>	<i>28,800</i>	<i>18,588</i>	<i>5,782</i>	<i>877</i>	106,686	95,275

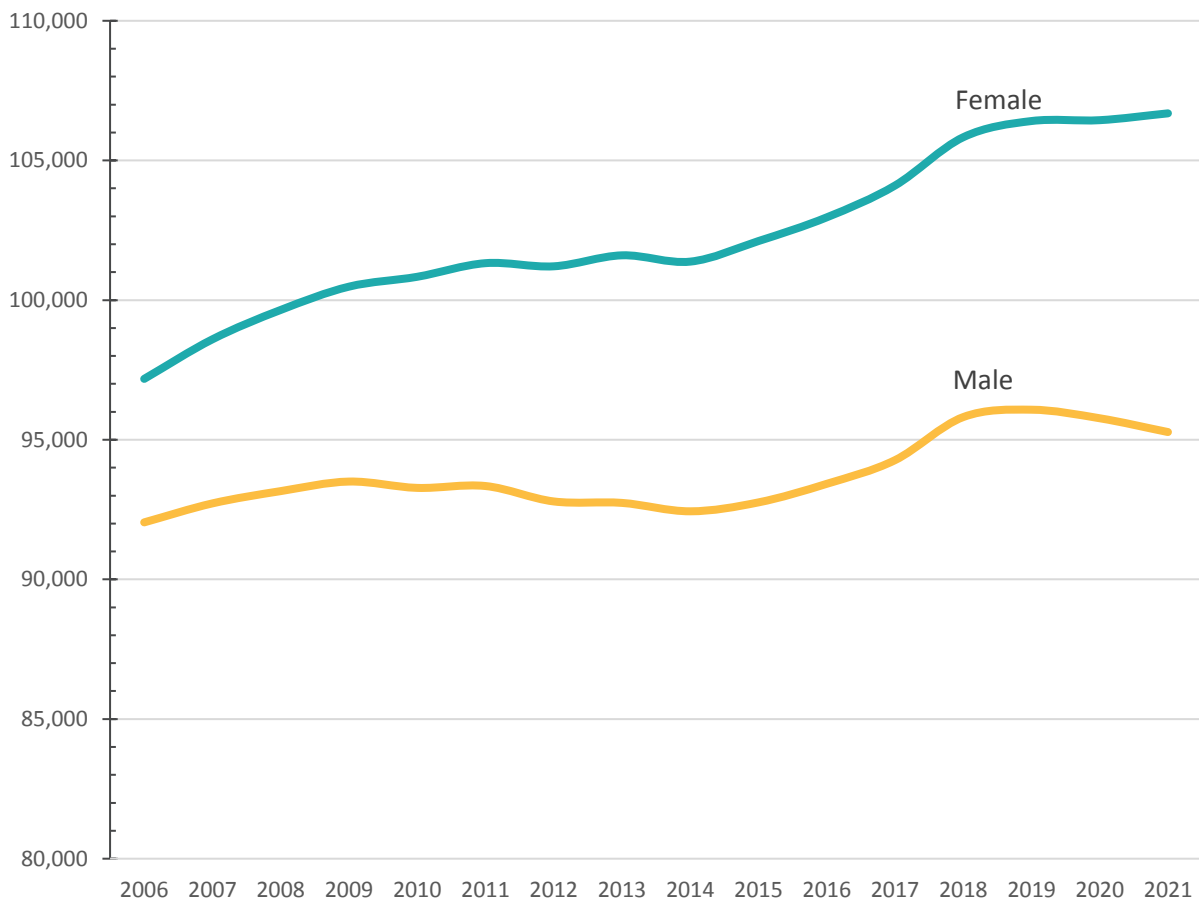
Source: Florida Department of Highway Safety and Motor Vehicles.

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 2020)

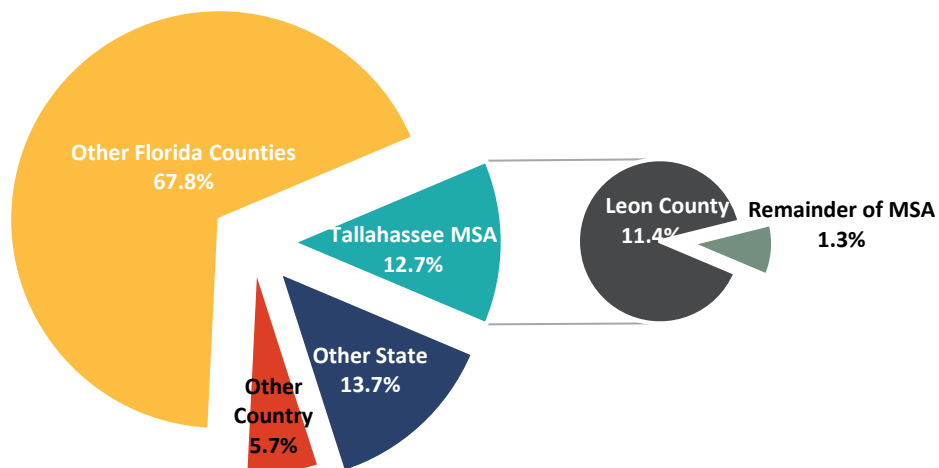
Trend: Over 80% of FSU and FAMU students are Florida residents, with the Tallahassee metro area accounting for about 13%. Broward, Miami-Dade, Palm Beach, Hillsborough, and Orange counties together account for 33% of students. About 14% of students are from another state, and nearly 6% from another country.

Place of Origin	Students	Percent of Total
Florida	42,177	80.5%
Tallahassee MSA	6,833	12.7%
Leon County	6,146	11.4%
Remainder of Tallahassee MSA	687	1.3%
Outside Tallahassee MSA	36,443	67.8%
Broward	4,656	8.7%
Miami-Dade	4,120	7.7%
Palm Beach	3,348	6.2%
Hillsborough	3,108	5.8%
Orange	2,755	5.1%
Remainder of Florida Counties	18,456	34.3%
Other State	7,373	13.7%
Georgia	1,630	3.0%
New York	431	0.8%
North Carolina	430	0.8%
Texas	392	0.7%
New Jersey	378	0.7%
Remainder of Other States	4,112	7.7%
Other Country	3,076	6.3%
China	509	0.9%
Panama	306	0.6%
India	176	0.3%
South Korea	136	0.3%
Venezuela	116	0.2%
Remainder of Other Countries	1,833	4.0%

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 2020

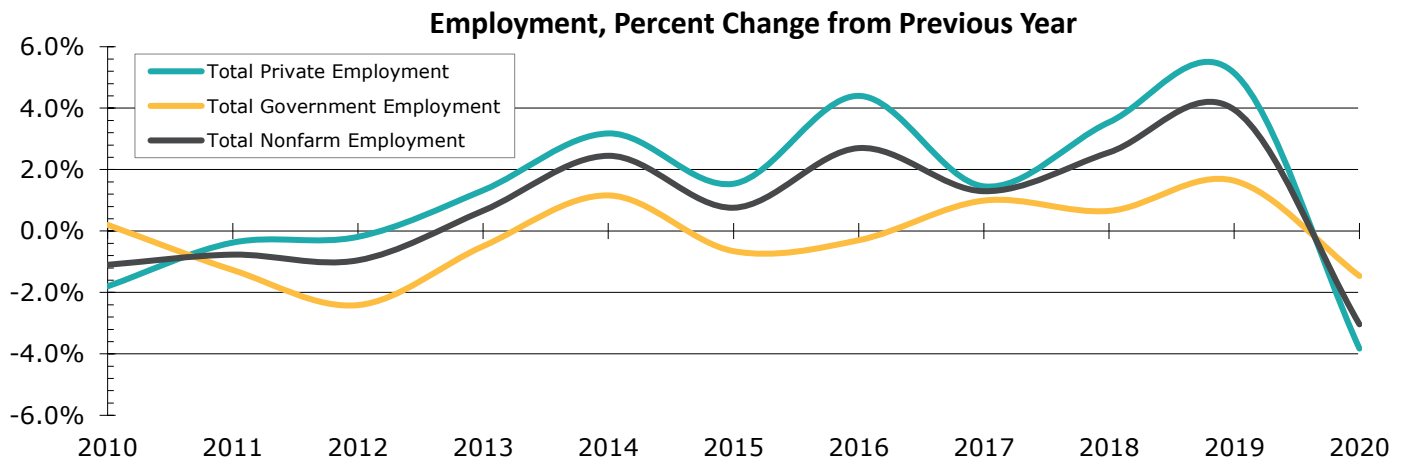
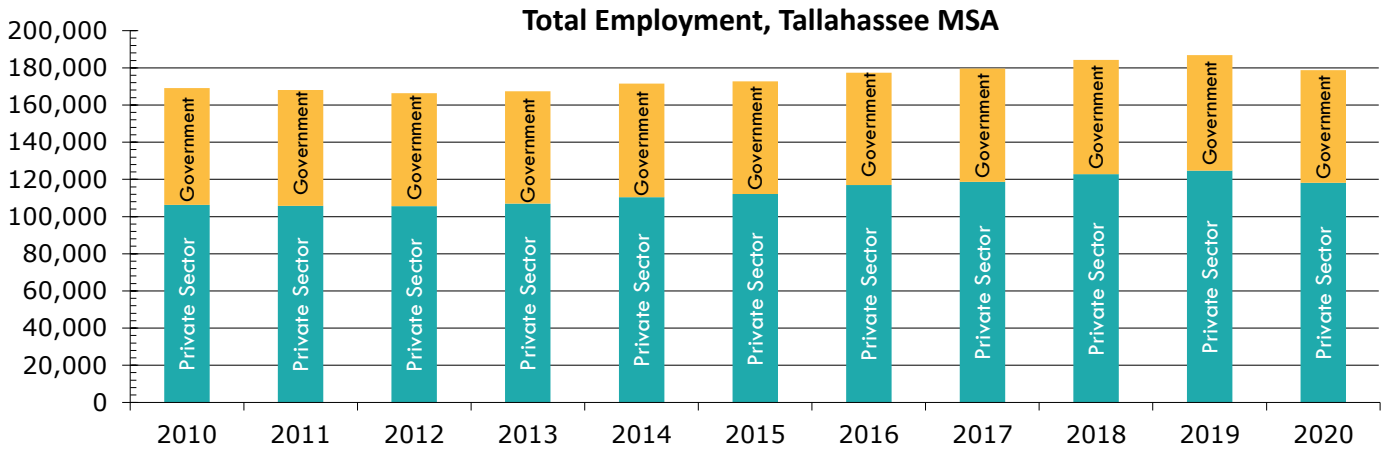
Origins of FSU and FAMU Students, Fall 2020



Trend: Total non-farm employment growth for the Tallahassee MSA for 2020 was -3%, a net decrease of 8,100 jobs. Total private employment was down 3.8% (loss of 6,600 jobs) in 2020 and government employment was down 1.5% over the year (loss of 1,500 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	122,800	3.5%	61,500	0.7%	184,300	2.6%
2019	124,700	5.1%	62,100	1.6%	186,800	4.0%
2020	118,100	-3.8%	60,600	-1.5%	178,700	-3.0%

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





Workforce and Income

Unemployment Rate

Annual Average

Trend: The average unemployment rate for the Tallahassee metro area generally fell from 2011 to 2019. In 2020, the average unemployment rate for the Tallahassee metro area was 6.0%, up from an average of 3.1% in 2019. For the State of Florida, the average unemployment rate in 2020 was 7.7%, up from 3.1% in 2019.

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%
2020	6.1%	6.0%	7.7%	8.1%

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

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



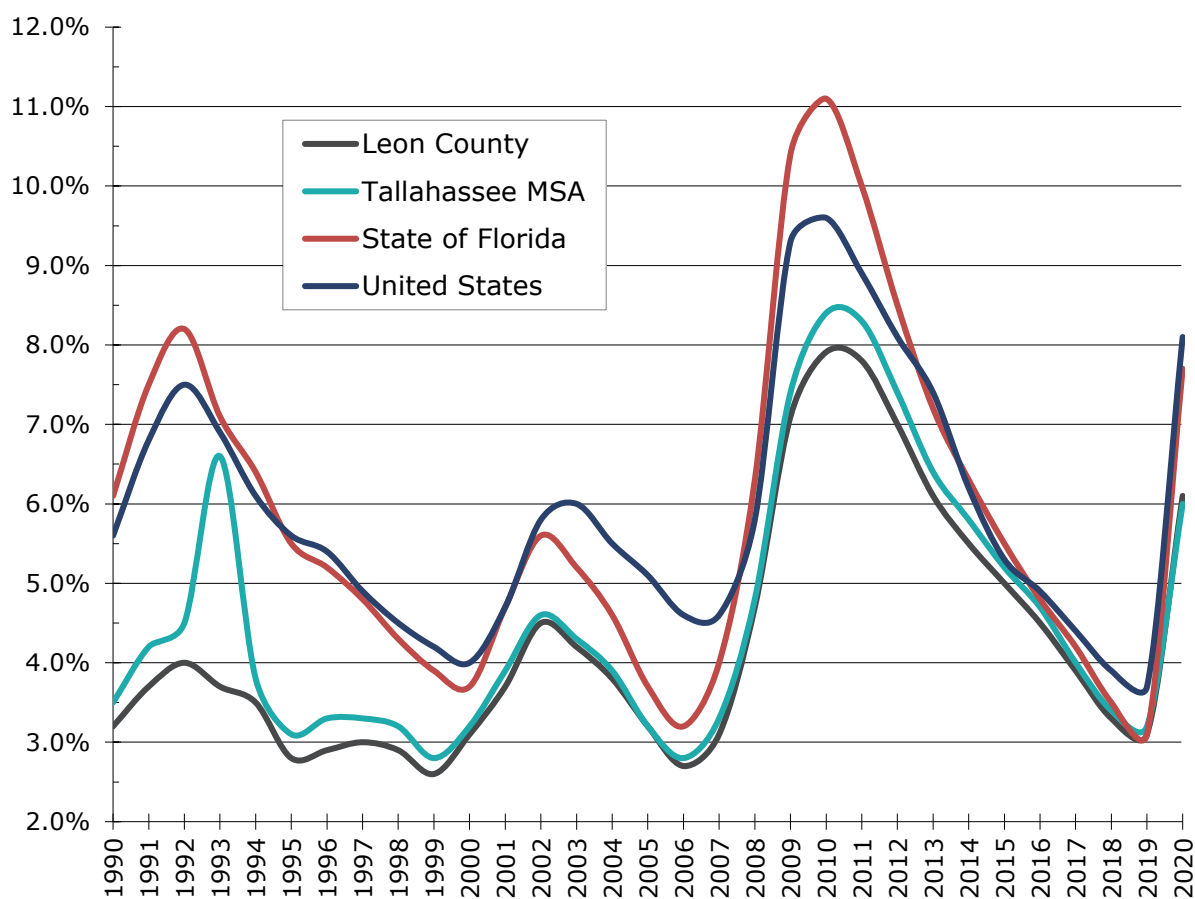
Workforce and Income

Unemployment Rate

Annual Average

Trend: The average unemployment rate for the Tallahassee metro area generally fell from 2011 to 2019. In 2020, the average unemployment rate for the Tallahassee metro area was 6.0%, up from an average of 3.1% in 2019. For the State of Florida, the average unemployment rate in 2020 was 7.7%, up from 3.1% in 2019.

Average Annual Unemployment Rate

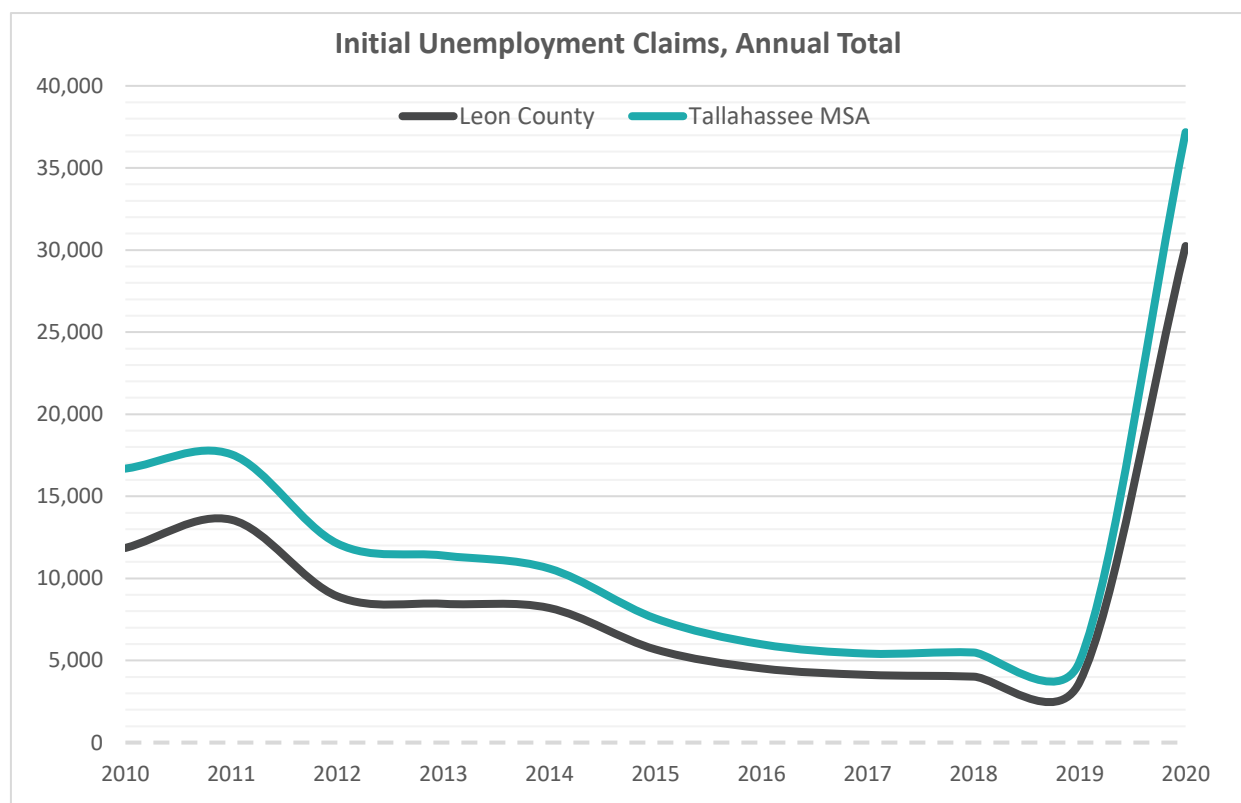


Trend: Initial claims for unemployment compensation in the Tallahassee MSA declined from 2011 to 2019 but reached an all-time high of 37,182 in 2020, with 65% occurring between April and July.

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
2010	11,853	—	16,688	—	1,144,823	—
2011	13,570	14%	17,555	5%	909,713	-21%
2012	8,908	-34%	12,121	-31%	764,167	-16%
2013	8,452	-5%	11,392	-6%	697,457	-9%
2014	8,196	-3%	10,597	-7%	595,498	-15%
2015	5,673	-31%	7,559	-29%	424,955	-29%
2016	4,520	-20%	5,988	-21%	360,497	-15%
2017	4,123	-9%	5,419	-10%	401,324	11%
2018	4,017	-3%	5,486	1%	320,652	-20%
2019	3,680	-11%	4,923	-9%	286,735	-29%
2020	30,248	653%	37,182	578%	3,064,565	856%

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

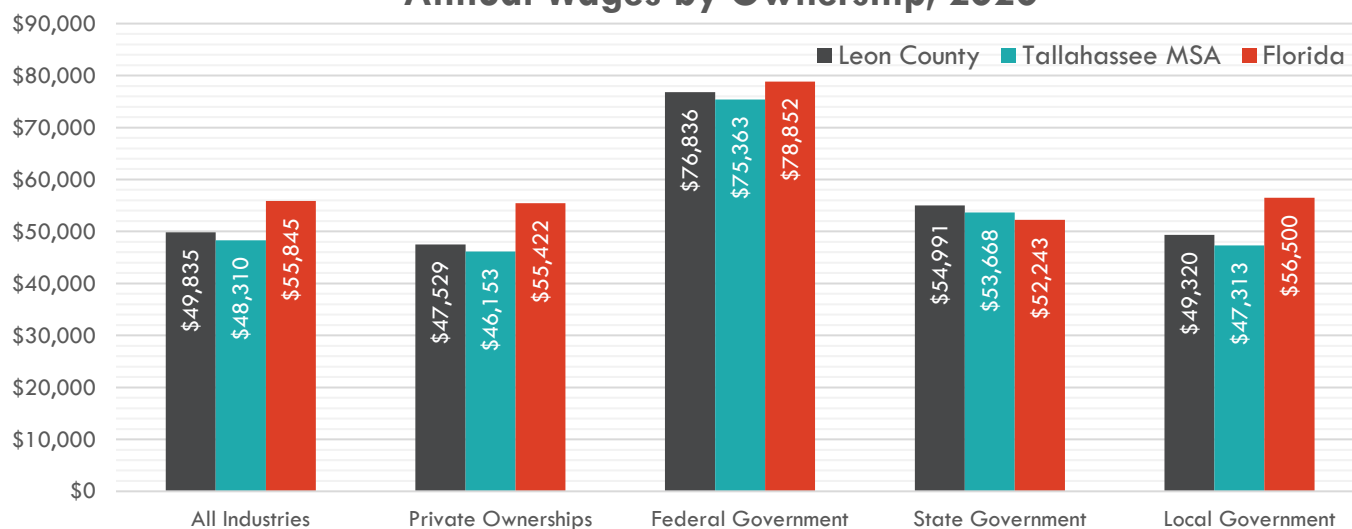
Annual Average Employment and Wages by Ownership

Trend: The average annual wage in Leon County in 2020 was \$49,835, 11% below the state average wage of \$55,845. The annual average state government wage was 5.3% 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	9,301	145,879	\$958	\$49,835
Private Ownerships	9,053	97,855	\$914	\$47,529
Federal Government	43	1,914	\$1,478	\$76,836
State Government	181	34,879	\$1,058	\$54,991
Local Government	24	11,231	\$948	\$49,320
Tallahassee MSA				
All Industries	11,068	170,023	\$929	\$48,310
Private Ownerships	10,715	115,583	\$888	\$46,153
Federal Government	70	2,128	\$1,449	\$75,363
State Government	229	38,387	\$1,032	\$53,668
Local Government	54	13,926	\$910	\$47,313
Florida				
All Industries	763,477	8,452,413	\$1,074	\$55,845
Private Ownerships	757,583	7,394,056	\$1,066	\$55,422
Federal Government	2,022	149,776	\$1,516	\$78,852
State Government	2,278	215,721	\$1,005	\$52,243
Local Government	1,594	692,859	\$1,087	\$56,500

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

Annual Wages by Ownership, 2020





Workforce and Income

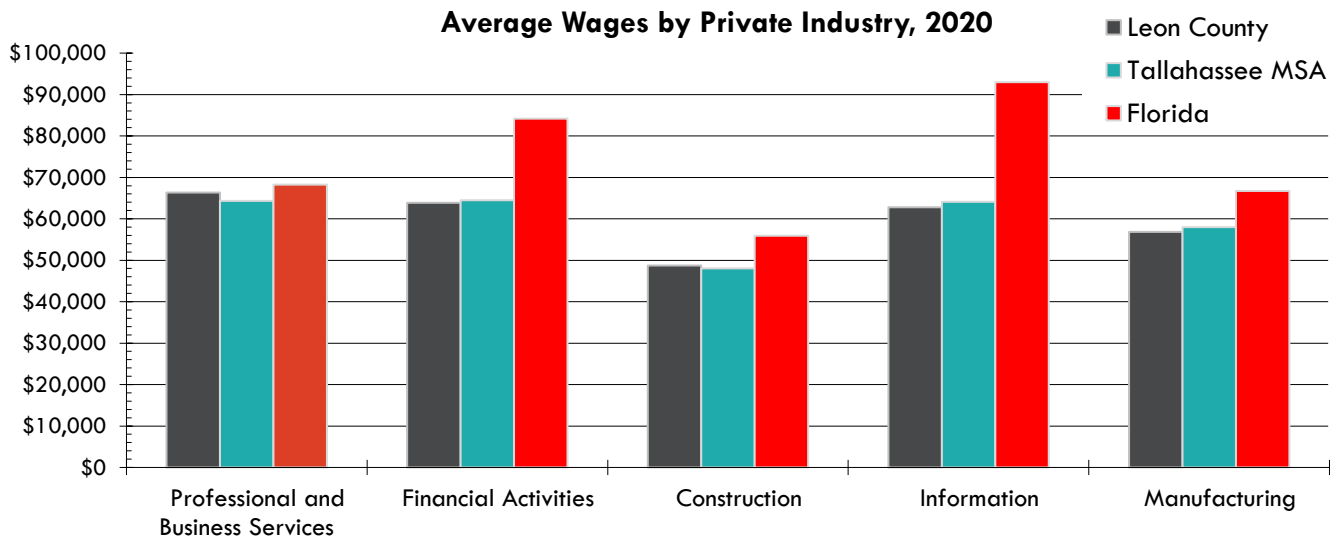
Average Annual Employment/Wages

Average Annual Employment & Wages, Select Private Industries

Trend: The average private sector annual wage in Leon County in 2020 was \$47,529, 14.2% below the state average private wage of \$55,422. By industry type, Leon County's private average annual wage ranged from 32% lower than the state average for the Information industry sector to 3% 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	2,530	19,111	\$66,354
Financial Activities	950	6,729	\$63,884
Construction	824	6,227	\$48,730
Information	188	2,979	\$62,755
Manufacturing	126	1,873	\$56,841
Tallahassee MSA			
Professional and Business Services	2,759	20,452	\$64,364
Financial Activities	1,043	7,075	\$64,468
Construction	1,133	7,974	\$48,026
Information	202	2,858	\$64,131
Manufacturing	170	3,353	\$58,002
Florida			
Professional and Business Services	187,431	1,362,914	\$68,258
Financial Activities	83,985	590,165	\$84,145
Construction	77,569	566,563	\$55,896
Information	13,475	131,443	\$92,955
Manufacturing	21,812	376,148	\$66,740

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



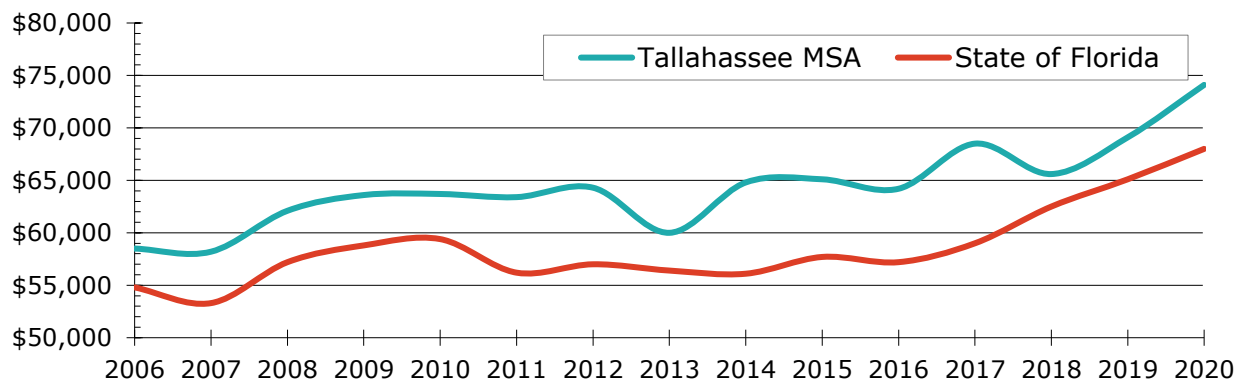
Trend: Median family income for the Tallahassee metro area was \$74,100 in 2020, according to the Federal Financial Institutions Examination Council. The median family income in Leon County was \$77,430 according to the Census Bureau's 2015-2019 5-Year American Community Survey.

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
2020	\$74,100	\$68,000	8.6% 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 2019, by jurisdiction

	2019
Leon County	\$77,430
Tallahassee MSA*	\$71,634
City of Tallahassee	\$69,221
Florida	\$67,414

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

Source: U.S. Census Bureau, 2015-2019 5-Year American Community Survey



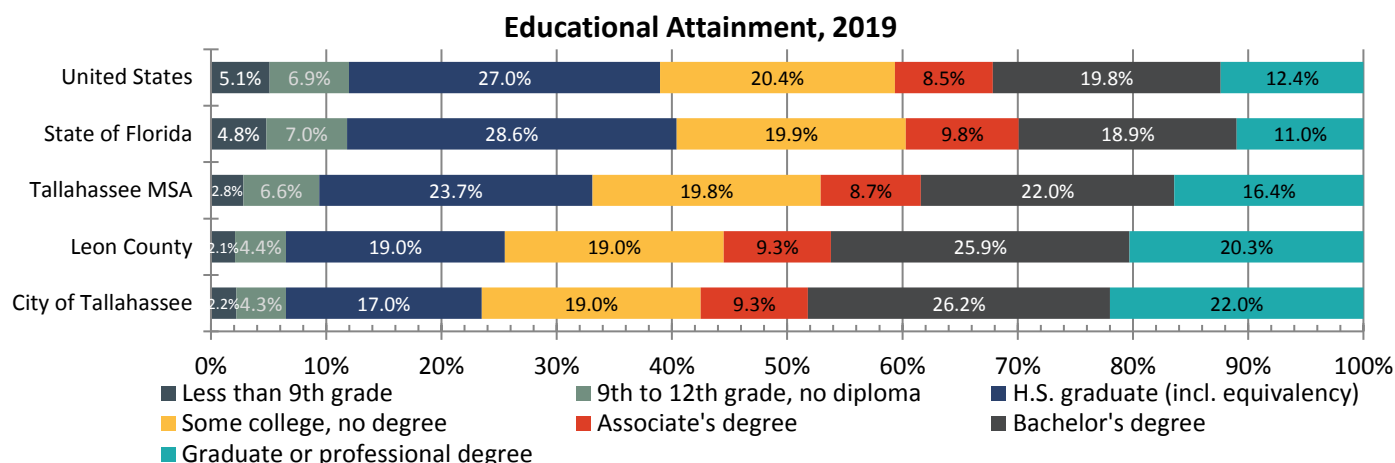
Workforce and Income

Population: Educational Attainment

Trend: The level of educational attainment has steadily increased in Leon County. As of 2019, 46.2% of Leon County residents 25 years and over had obtained a Bachelor's degree or higher, up from 41.7% in 2000. In comparison, 29.9% of State of Florida residents and 32.2% of US residents 25 years and over had obtained a Bachelor's degree or higher. Some 48.2% of Tallahassee residents had a bachelor's degree or higher.

Educational Attainment Level as of 2019*	City of Tallahassee	Leon County	Tallahassee MSA	State of Florida	United States
Less than 9th grade	2.2%	2.1%	2.8%	4.8%	5.1%
9th to 12th grade, no diploma	4.3%	4.4%	6.6%	7.0%	6.9%
H.S. graduate (incl. equivalency)	17.0%	19.0%	23.7%	28.6%	27.0%
Some college, no degree	19.0%	19.0%	19.8%	19.9%	20.4%
Associate's degree	9.3%	9.3%	8.7%	9.8%	8.5%
Bachelor's degree	26.2%	25.9%	22.0%	18.9%	19.8%
Graduate or professional degree	22.0%	20.3%	16.4%	11.0%	12.4%

* Population 25 years and older.



Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2015-2019, Table S1501

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, 2014-2020

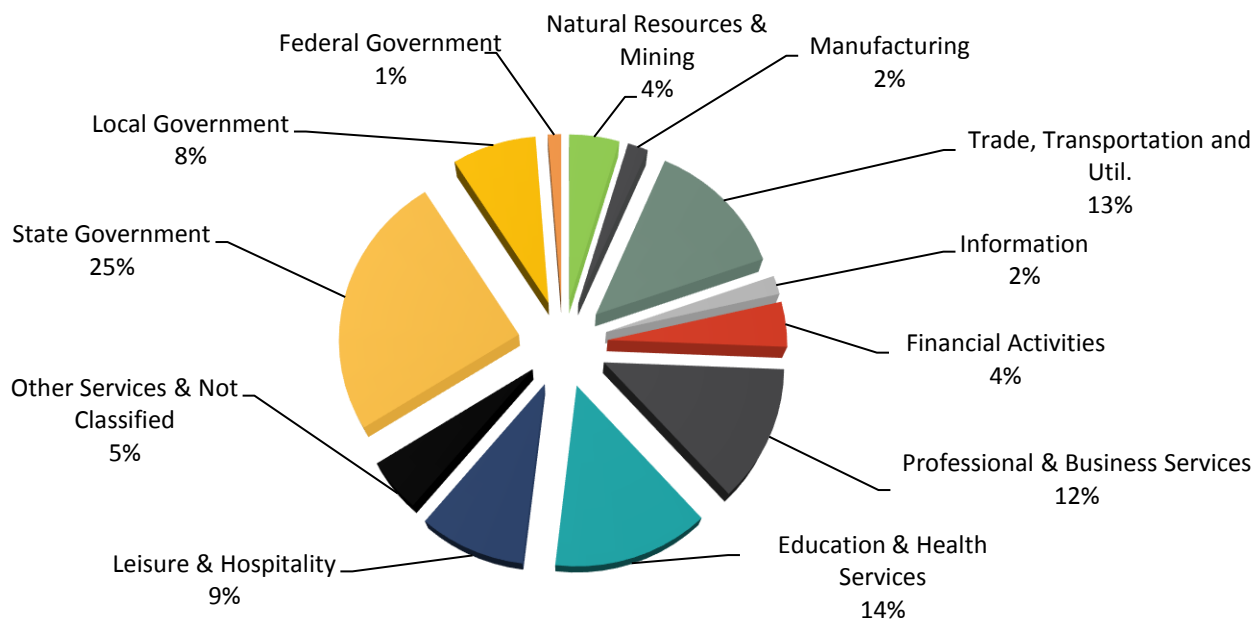
Trend: Non-agricultural jobs declined by 8,400 in 2020 compared to 2019, with modest gains only in Manufacturing (100 jobs), Professional & Business Services (100), and Federal Government (100). Job losses in 2020 eroded the 5-year average annual growth rate, decreasing from 1.8% per year during 2014-2019 to only 0.7% per year during 2015-2020.

Industry Type	2015	2016	2017	2018	2019	2020	Avg. Ann. Rate Change 2015-2020
Mining, Logging & Construction	6,700	7,500	7,700	8,400	9,000	8,300	4.3%
Manufacturing	3,100	3,100	3,200	3,200	3,300	3,400	1.8%
Trade, Transportation and Util.	24,200	24,400	24,300	24,800	24,600	23,500	-0.6%
Information	3,500	3,200	3,400	3,100	3,100	3,100	-2.4%
Financial Activities	7,000	7,500	7,800	7,900	7,800	7,500	1.4%
Professional & Business Services	19,000	20,300	20,300	21,400	22,400	22,500	3.4%
Education & Health Services	21,100	21,800	23,200	24,000	24,600	24,400	2.9%
Leisure & Hospitality	18,700	19,600	19,800	20,400	21,000	16,600	-2.4%
Other Services & Not Classified	8,900	9,400	8,900	9,600	9,100	8,800	-0.2%
State Government	43,500	43,200	44,000	44,800	45,300	44,400	0.4%
Local Government	15,200	15,300	15,000	14,700	14,800	14,000	-1.6%
Federal Government	1,900	2,000	2,100	2,100	2,100	2,200	2.9%
Total	172,800	177,300	179,700	184,400	187,100	178,700	0.7%

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 (2020)





Workforce and Income

Employment

State Government Employees in Tallahassee MSA

Trend: Since 1990, State government employment in the Tallahassee metro area has only fluctuated between 38,000 and 46,000. Employment growth has come mostly from the private sector, so the proportion of State jobs to total employment for the Tallahassee metro area has steadily declined over the past 30 years. The proportion of State government employment to total employment for the Tallahassee MSA declined from 29.7% in the 1990s, to 26.9% in the 2000s, and to 25.3% in the 2010s.

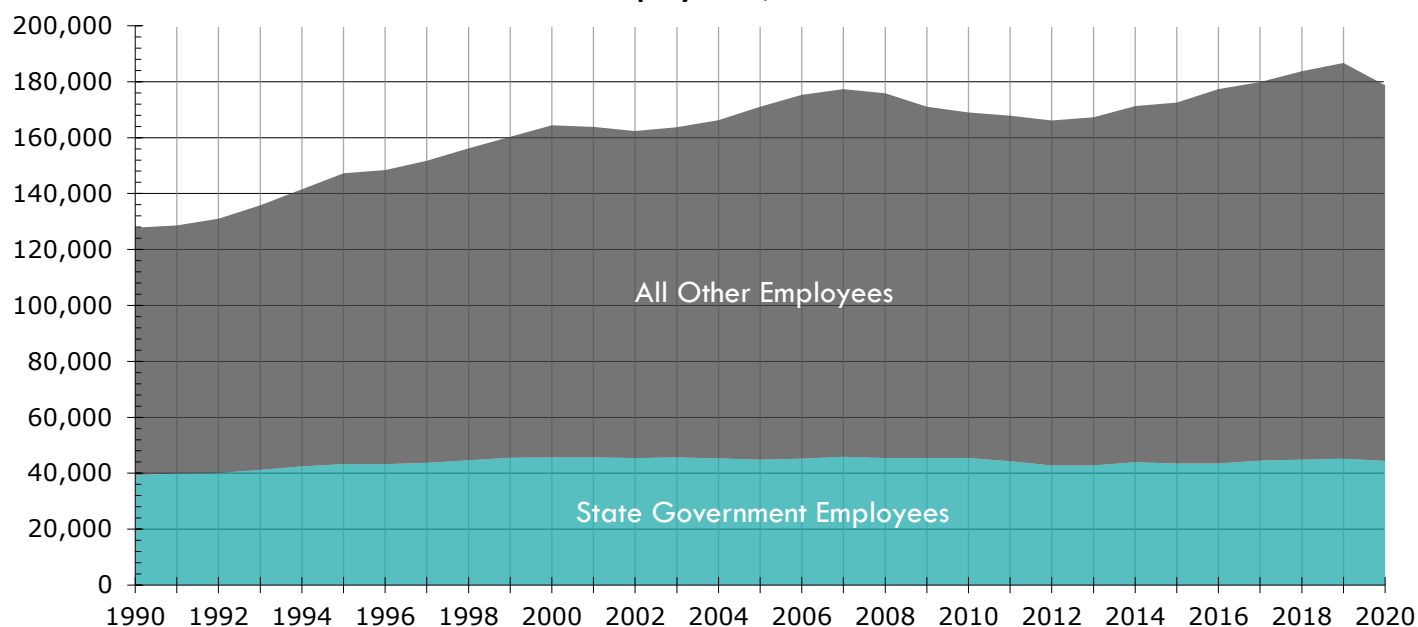
Year	State Government Employees		All Other Employees		State Government Employees as Percent of Total	
	Annual Average	Change from Previous Year	Annual Average	Change from Previous Year	Annual Average	Change from Previous Year (pts.)
1990	39,300		88,500		30.8%	
1991	39,900	1.5%	88,700	0.2%	31.0%	0.3
1992	40,100	0.5%	90,900	2.5%	30.6%	-0.4
1993	41,200	2.7%	94,600	4.1%	30.3%	-0.3
1994	42,500	3.2%	99,000	4.7%	30.0%	-0.3
1995	43,300	1.9%	104,000	5.1%	29.4%	-0.6
1996	43,300	0.0%	105,100	1.1%	29.2%	-0.2
1997	43,700	0.9%	108,000	2.8%	28.8%	-0.4
1998	44,600	2.1%	111,600	3.3%	28.6%	-0.3
1999	45,500	2.0%	114,800	2.9%	28.4%	-0.2
2000	45,600	0.2%	118,800	3.5%	27.7%	-0.6
2001	45,600	0.0%	118,200	-0.5%	27.8%	0.1
2002	45,400	-0.4%	117,000	-1.0%	28.0%	0.1
2003	45,600	0.4%	118,100	0.9%	27.9%	-0.1
2004	45,300	-0.7%	121,000	2.5%	27.2%	-0.6
2005	44,800	-1.1%	126,300	4.4%	26.2%	-1.1
2006	45,200	0.9%	130,100	3.0%	25.8%	-0.4
2007	45,900	1.5%	131,500	1.1%	25.9%	0.1
2008	45,400	-1.1%	130,500	-0.8%	25.8%	-0.1
2009	45,400	0.0%	125,600	-3.8%	26.5%	0.7
2010	45,400	0.0%	123,600	-1.6%	26.9%	0.3
2011	44,300	-2.4%	123,500	-0.1%	26.4%	-0.5
2012	42,800	-3.4%	123,300	-0.2%	25.8%	-0.6
2013	42,800	0.0%	124,500	1.0%	25.6%	-0.2
2014	43,900	2.6%	127,400	2.3%	25.6%	0.0
2015	43,500	-0.9%	129,000	1.3%	25.2%	-0.4
2016	43,500	0.0%	133,800	3.7%	24.5%	-0.7
2017	44,500	2.3%	135,400	1.2%	24.7%	0.2
2018	44,800	0.7%	138,900	2.6%	24.4%	-0.3
2019	45,200	1.6%	141,500	4.5%	24.2%	-0.2
2020	44,400	-0.9%	134,300	-3.3%	24.8%	0.6

Source: US Bureau of Labor Statistics, Federal Bank of St Louis

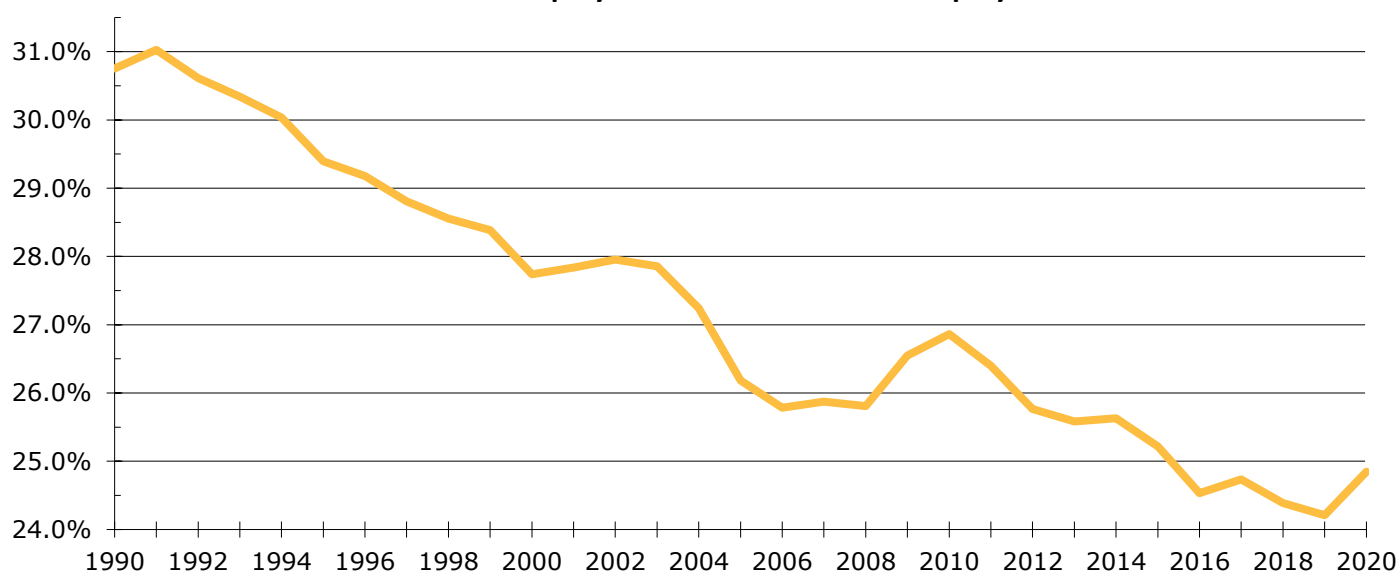
State Government Employees in Tallahassee MSA

Trend: Since 1990, State government employment in the Tallahassee metro area has only fluctuated between 38,000 and 46,000. Employment growth has come mostly from the private sector, so the proportion of State jobs to total employment for the Tallahassee metro area has steadily declined over the past 30 years. The proportion of State government employment to total employment for the Tallahassee MSA declined from 29.7% in the 1990s, to 26.9% in the 2000s, and to 25.3% in the 2010s.

Total Employment, Tallahassee MSA



State Government Employees as Percent of Total Employees in Tallahassee MSA





Workforce and Income

Projected Employment by Occupation:

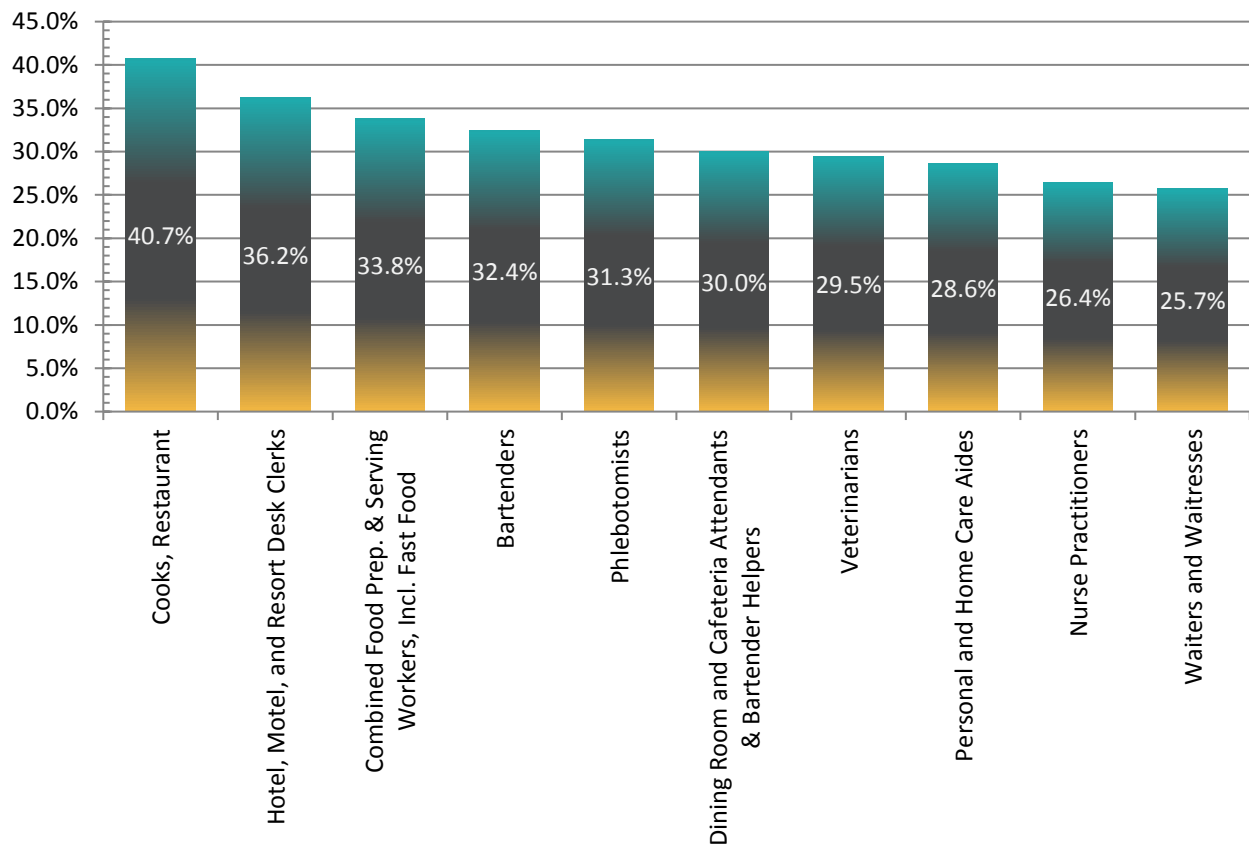
Fastest Growing Occupations in Capital Region (2020-2028)

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	2020 Emp.	2028 Emp.	Total Emp. Change	Percent Growth
Cooks, Restaurant	1341	1887	546	40.7%
Hotel, Motel, and Resort Desk Clerks	196	267	71	36.2%
Combined Food Prep. & Serving Workers, Incl. Fast Food	5765	7712	1947	33.8%
Bartenders	478	633	155	32.4%
Phlebotomists	252	331	79	31.3%
Dining Room and Cafeteria Attendants & Bartender Helper	436	567	131	30.0%
Veterinarians	173	224	51	29.5%
Personal and Home Care Aides	486	625	139	28.6%
Nurse Practitioners	318	402	84	26.4%
Waiters and Waitresses	2643	3323	680	25.7%

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

Fastest Growing Occupations, Percent Growth 2020-2028





Workforce and Income

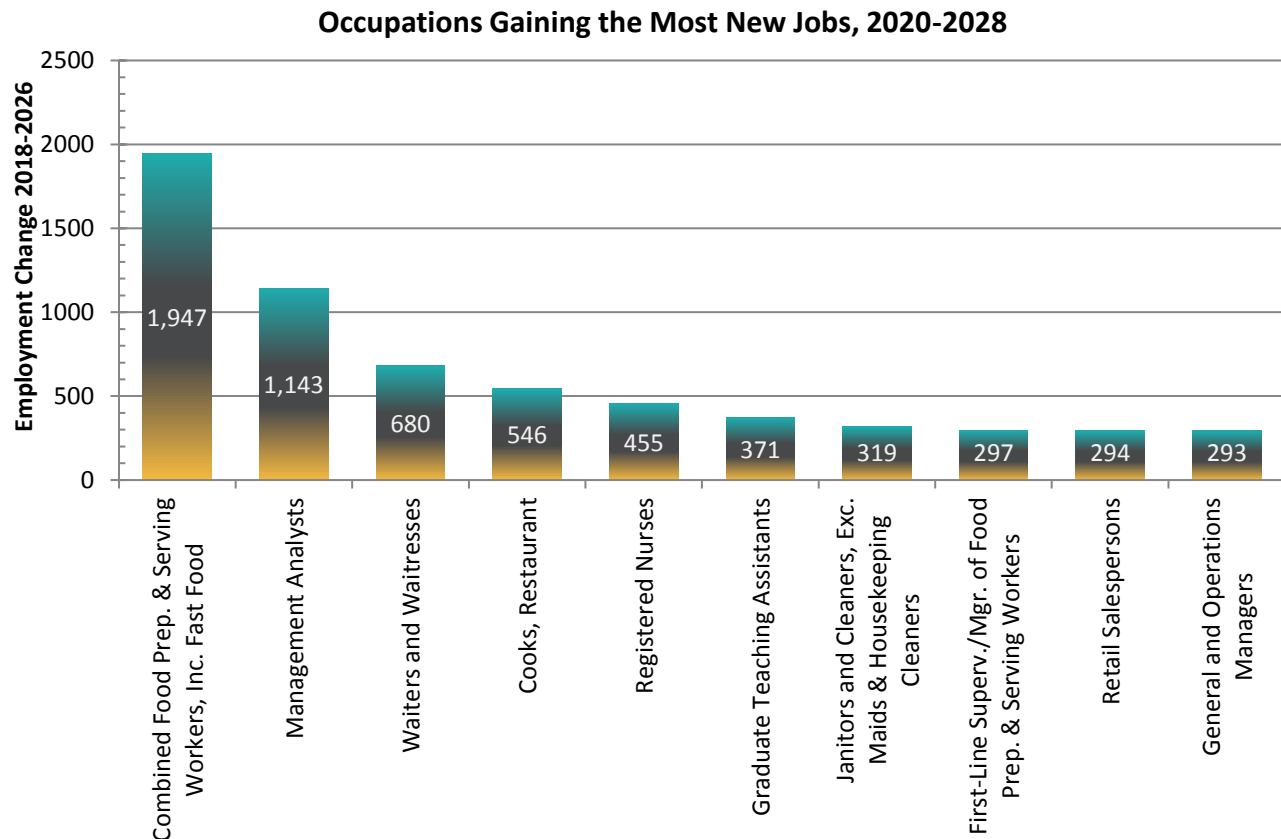
Projected Employment by Occupation:

Occupations Gaining the Most New Jobs (2020-2028)

Trend: By total employment change, Food Prep. & Serving Workers, and Management Analysts are the occupations projected to add the most jobs in the Capital Region (Gadsden, Leon, and Wakulla counties) by 2028.

Industry	2020 Emp.	2028 Emp.	Total Emp. Change	Percent Growth
Combined Food Prep. & Serving Workers, Inc. Fast Food	5,765	7,712	1,947	33.8%
Management Analysts	6,534	7,677	1,143	17.5%
Waiters and Waitresses	2,643	3,323	680	25.7%
Cooks, Restaurant	1,341	1,887	546	40.7%
Registered Nurses	3,498	3,953	455	13.0%
Graduate Teaching Assistants	3,789	4,160	371	9.8%
Janitors and Cleaners, Exc. Maids & Housekeeping Cleaners	2,743	3,062	319	11.6%
First-Line Superv./Mgr. of Food Prep. & Serving Workers	1,171	1,468	297	25.4%
Retail Salespersons	5,379	5,673	294	5.5%
General and Operations Managers	3,515	3,808	293	8.3%

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





Workforce and Income

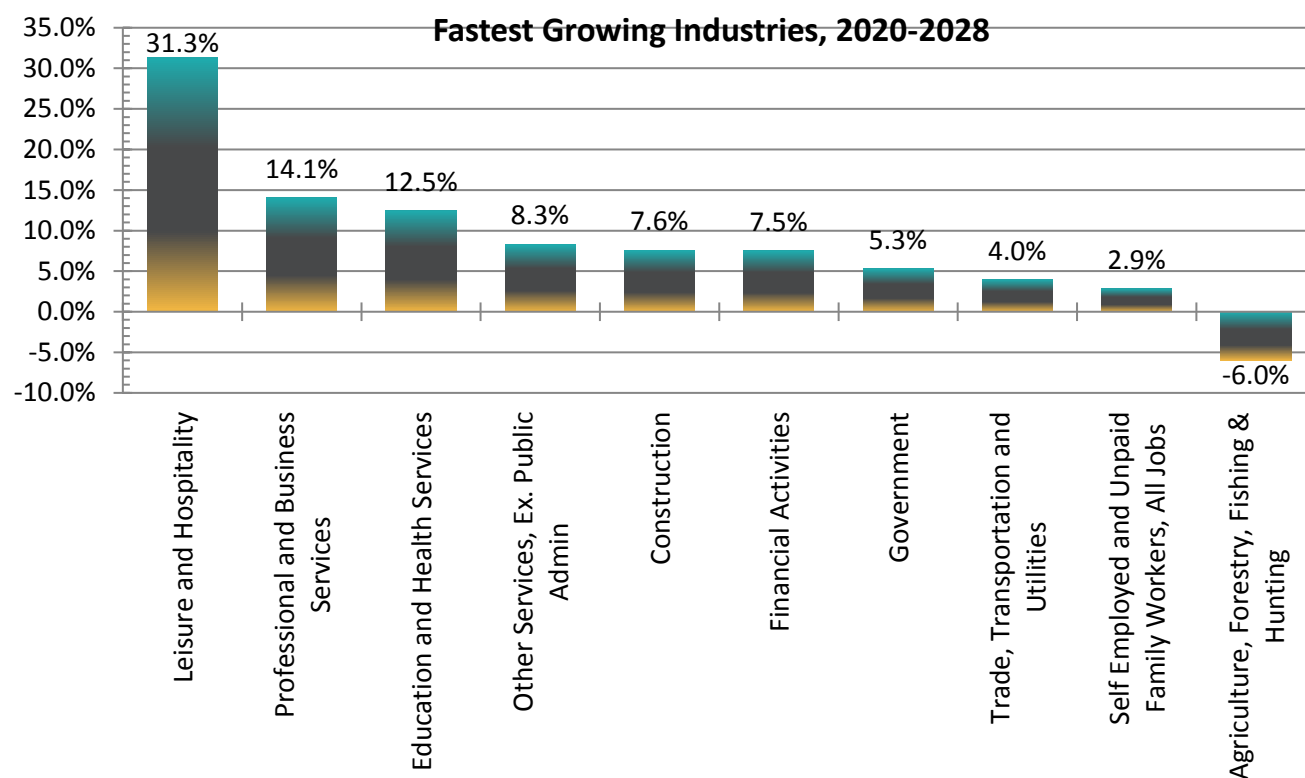
Projected Employment by Industry:

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 2020 and 2028.

Industry	2020 Emp.	2028 Emp.	Total Emp. Change	Percent Growth
Leisure and Hospitality	17,465	22,934	5,469	31.3%
Professional and Business Services	21,758	24,821	3,063	14.1%
Education and Health Services	48,572	54,631	6,059	12.5%
Other Services, Ex. Public Admin	7,368	7,981	613	8.3%
Construction	8,560	9,211	651	7.6%
Financial Activities	7,524	8,091	567	7.5%
Government	55,981	58,972	2,991	5.3%
Trade, Transportation and Utilities	23,672	24,618	946	4.0%
Self Employed and Unpaid Family Workers, All Jobs	12,861	13,233	372	2.9%
Manufacturing	3,280	3,360	80	2.4%
Mining	159	161	2	1.3%
Information	3,000	2,959	-41	-1.4%
Agriculture, Forestry, Fishing & Hunting	2347	2206	-141	-6.0%
Total All Industries	199,062	210,671	11,609	5.8%

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



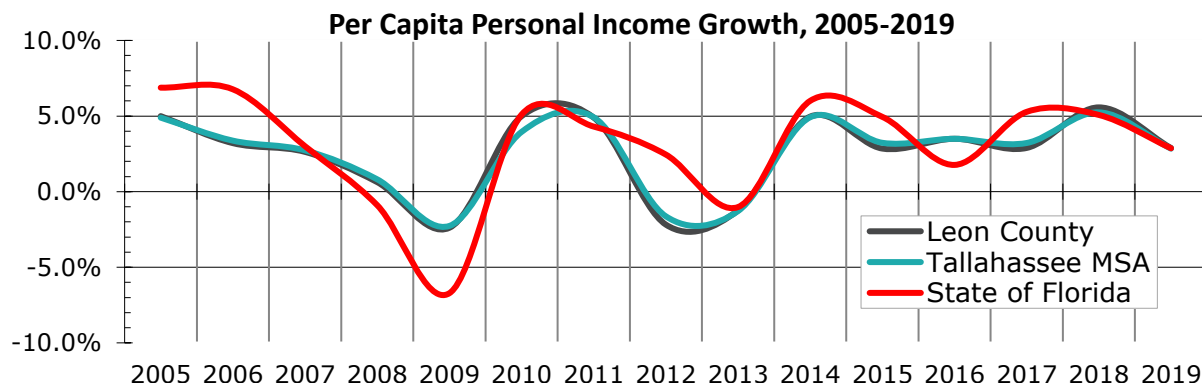
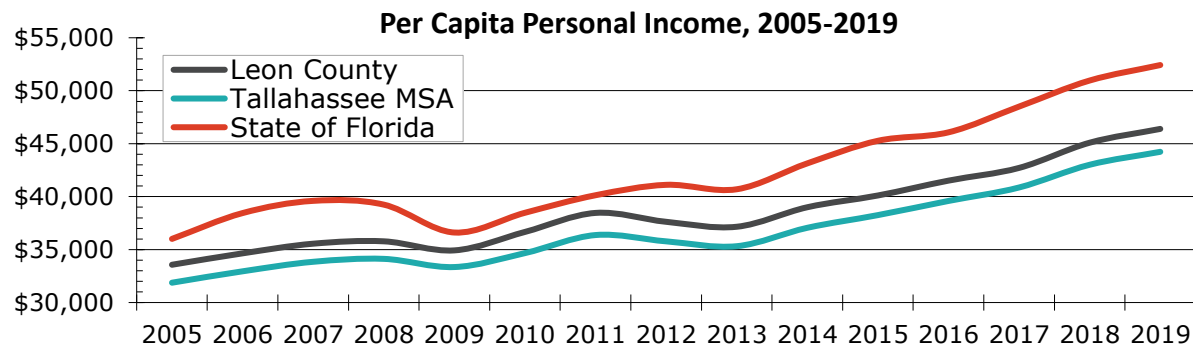
Workforce and Income

Per Capita Personal Income

Trend: Per capita personal income increased 2.9% in Leon County in 2019 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%	\$34,667	3.9%	\$38,475	5.1%
2011	\$38,463	4.9%	\$36,372	4.9%	\$40,131	4.3%
2012	\$37,624	-2.2%	\$35,779	-1.6%	\$41,115	2.5%
2013	\$37,155	-1.2%	\$35,320	-1.3%	\$40,696	-1.0%
2014	\$38,999	5.0%	\$37,058	4.9%	\$43,140	6.0%
2015	\$40,110	2.8%	\$38,255	3.2%	\$45,273	4.9%
2016	\$41,513	3.5%	\$39,592	3.5%	\$46,073	1.8%
2017	\$42,713	2.9%	\$40,866	3.2%	\$48,504	5.3%
2018	\$45,093	5.6%	\$43,009	5.2%	\$50,964	5.1%
2019	\$46,394	2.9%	\$44,232	2.8%	\$52,426	2.9%

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





Workforce and Income

Graduate Retention

Recent Graduates Employed in Leon County by the next Fall

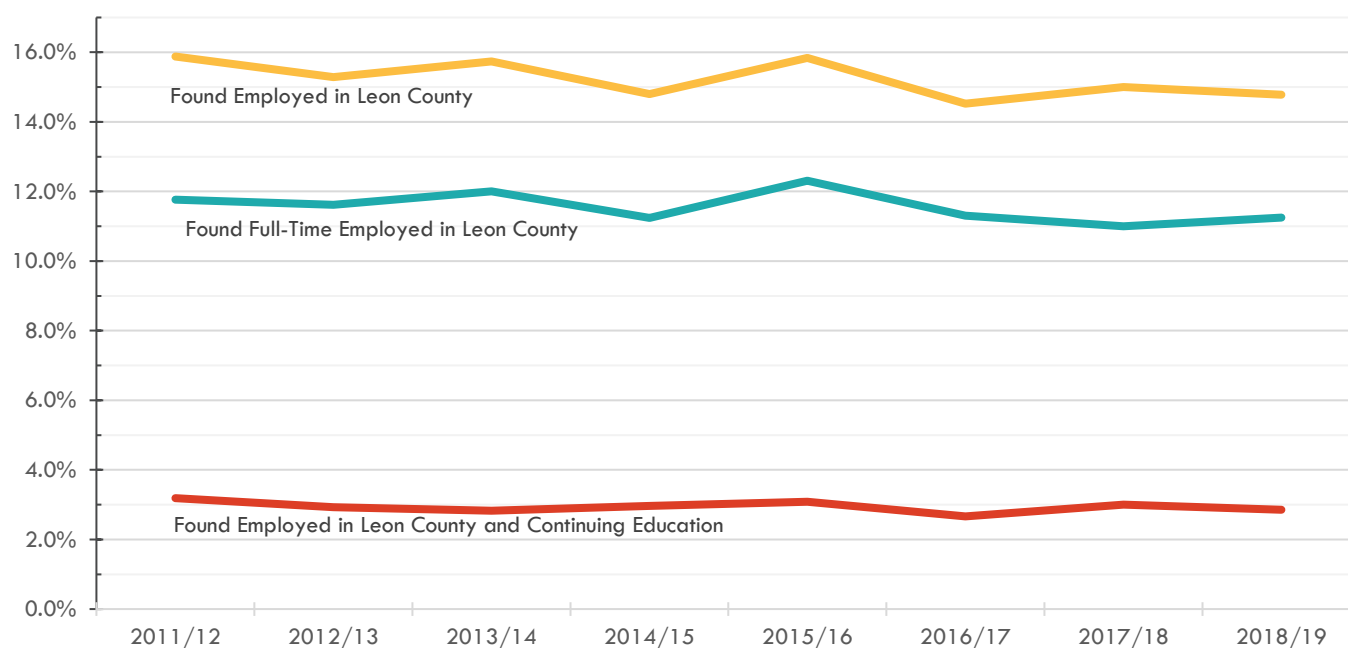
Trend: "Graduate Retention" is not easy to define. Higher education enrollment is driven by State, national, and international recruitment rather than by local labor market needs. The number of graduates and the skills they graduate with may not necessarily match the needs of Tallahassee's labor market. Each academic year, 12,000-13,000 graduates complete degrees at FSU and FAMU. Graduate retention is consistently around 15%, with 11-12% full-time employed in Leon County by the next Fall after graduation. The 12% of graduates found full-time employed in Leon County the following year is about the same as the proportion of incoming university students from Leon County. This 12% retention equilibrium for Leon County generates continuous renewal of the local workforce and is consistent with the tempo of growth in the local labor force and employment.

Academic Year	FSU/FAMU Combined Total Completers	Found Employed in Leon County		Found Full-Time Employed in Leon County		Found Employed in Leon County and Continuing Education		Found Employed in Leon County, Not Continuing Education	
		#	%	#	%	#	%	#	%
2011/12	12,394	1,968	15.9%	1,458	11.8%	395	3.2%	1,573	12.7%
2012/13	12,666	1,936	15.3%	1,471	11.6%	371	2.9%	1,565	12.4%
2013/14	12,777	2,011	15.7%	1,534	12.0%	361	2.8%	1,650	12.9%
2014/15	13,088	1,937	14.8%	1,471	11.2%	388	3.0%	1,549	11.8%
2015/16	13,347	2,114	15.8%	1,643	12.3%	411	3.1%	1,703	12.8%
2016/17	13,254	1,925	14.5%	1,498	11.3%	353	2.7%	1,572	11.9%
2017/18	13,260	1,931	15.0%	1,470	11.0%	332	3.0%	1,599	12.0%
2018/19	13,156	1,945	14.8%	1,480	11.2%	375	2.9%	1,570	11.9%

Note: Cohort tracking limited to graduates employed within Florida; does not include self-employed, very small employers, or federal employees.

Source: Florida Dept. of Education, Florida Education Training and Placement Information Program (FETPIP)

FSU & FAMU Recent Completers Employed in Leon County by the next Fall

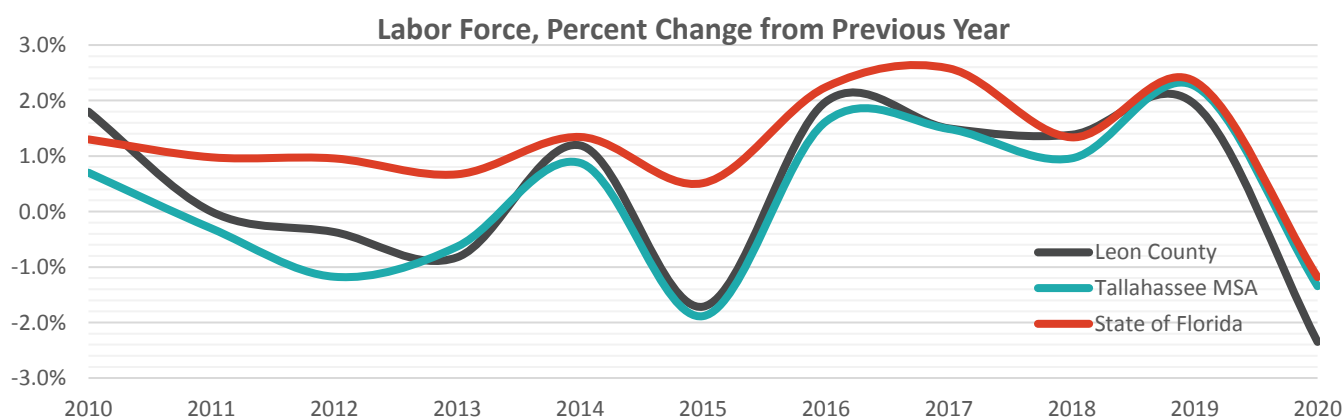
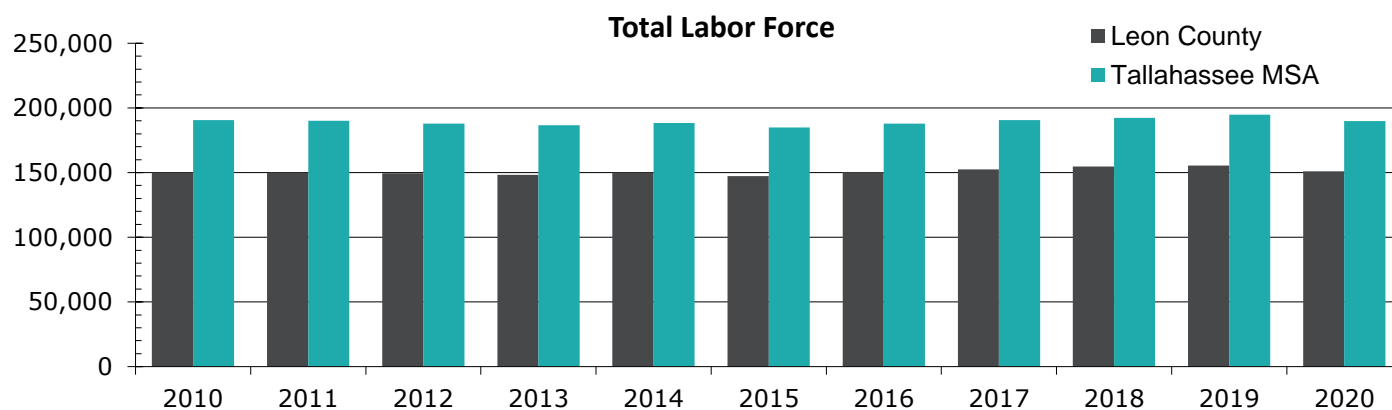


Trend: The Tallahassee MSA's labor force grew 2.7% between 2015 to 2020, with an average annual growth rate of around 0.6% per year.

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%	187,869	-1.2%	9,391,000	1.0%
2013	148,180	-0.8%	186,681	-0.6%	9,454,000	0.7%
2014	149,946	1.2%	188,316	0.9%	9,581,000	1.3%
2015	147,375	-1.7%	184,766	-1.9%	9,630,000	0.5%
2016	150,292	2.0%	187,763	1.6%	9,846,000	2.2%
2017	152,544	1.5%	190,557	1.5%	10,100,000	2.6%
2018	154,655	1.4%	192,384	1.0%	10,235,000	1.3%
2019	155,493	1.9%	194,870	2.3%	10,337,000	2.3%
2020	151,021	-2.3%	189,795	-1.3%	10,114,000	-1.2%

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
Tallahassee MSA

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 net employment change equals the job creation minus job destruction. 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	Tallahassee MSA Job Destruction	Tallahassee MSA Job Creation Trend	Tallahassee MSA Job Destruction Trend	Net Empl. Change
1998	6,794	6,304	7,954	7,170	490
1999	7,358	7,006	7,952	7,118	352
2000	8,842	8,278	7,939	7,057	564
2001	8,823	7,198	7,896	6,979	1,625
2002	7,899	6,371	7,815	6,884	1,528
2003	7,467	6,947	7,698	6,778	520
2004	8,178	6,800	7,545	6,660	1,378
2005	8,418	6,073	7,357	6,531	2,345
2006	7,515	6,404	7,137	6,394	1,111
2007	6,937	6,722	6,904	6,247	215
2008	6,466	7,043	6,676	6,088	-577
2009	5,328	6,085	6,475	5,920	-757
2010	5,969	5,282	6,318	5,756	687
2011	5,691	5,000	6,212	5,609	691
2012	5,965	5,266	6,160	5,488	699
2013	5,859	4,942	6,161	5,398	917
2014	6,160	5,165	6,211	5,338	995
2015	5,955	5,043	6,302	5,306	912
2016	6,770	5,371	6,427	5,296	1,399
2017	6,271	5,582	6,575	5,301	689
2018	7,255	5,476	6,740	5,312	1,779
2019	7,445	5,597	6,910	5,326	1,848

Note: Data for firms in private ownership; subject to annual revision.

Source: Quarterly Workforce Indicators, U.S. Census Bureau

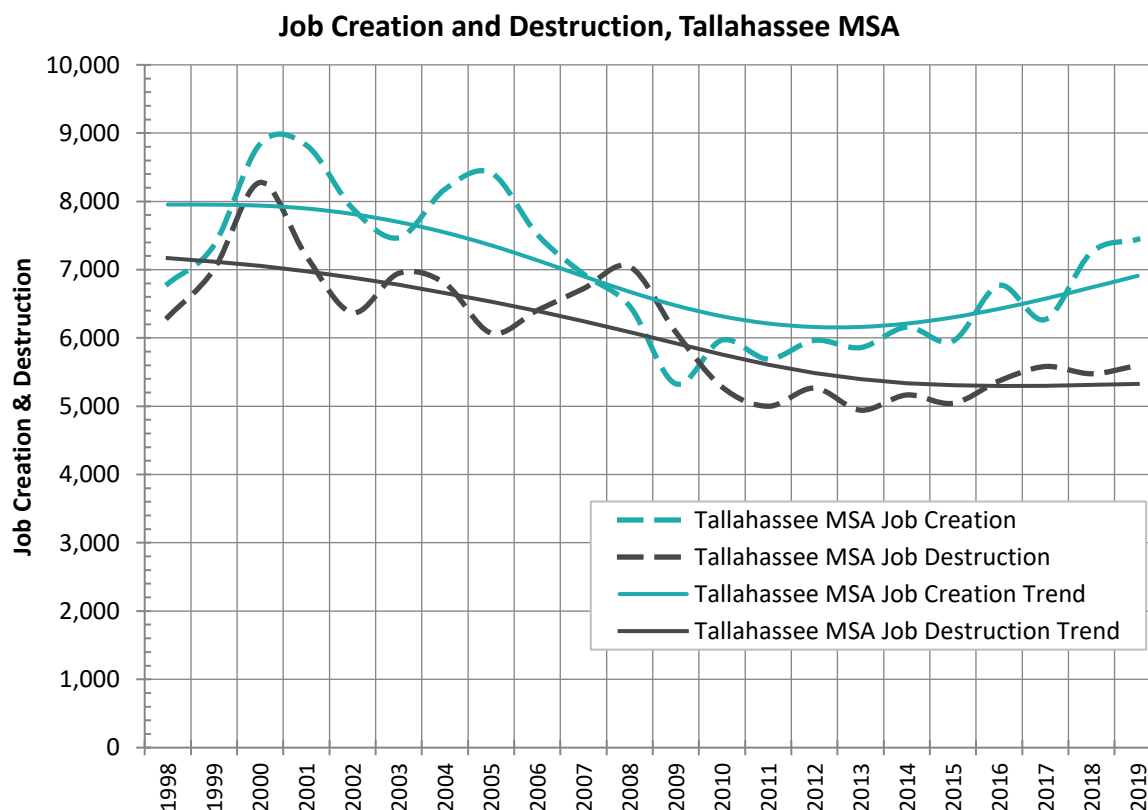


Labor Force and Income

Job Creation and Destruction

Tallahassee MSA

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 net employment change equals the job creation minus job destruction. Trend lines use Hodrick-Prescott (HP) filter as a data-smoothing technique to remove short-term fluctuations and display long-term trends.





Workforce and Income

Occupational Employment and Wages

Occupations with Employment of 1,000+

Trend: The 2020 estimated average hourly wage for all occupations in the Tallahassee MSA was \$23.31, with an average wage of \$29.17 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2020	(2020 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Total All Occupations	169,680	\$23.21	\$18.20	\$11.30	\$29.17
Office and Administrative Support Occupations	22,080	\$17.95	\$15.98	\$11.71	\$21.08
Business and Financial Operations Occupations	18,280	\$27.92	\$23.05	\$16.25	\$33.75
Food Preparation and Serving Related Occupations	15,720	\$12.00	\$10.55	\$9.24	\$13.38
Sales and Related Occupations	14,440	\$17.84	\$12.78	\$10.16	\$21.68
Educational Instruction and Library Occupations	13,510	\$24.73	\$22.00	\$13.48	\$30.35
Healthcare Practitioners and Technical Occupations	10,830	\$36.61	\$28.08	\$15.81	\$47.01
Management Occupations	10,450	\$46.02	\$39.35	\$24.34	\$56.85
Transportation and Material Moving Occupations	8,930	\$15.95	\$14.34	\$10.91	\$18.47
Computer and Mathematical Occupations	7,140	\$31.23	\$26.93	\$17.26	\$38.21
Installation, Maintenance, and Repair Occupations	6,320	\$20.95	\$19.46	\$13.38	\$24.74
Construction and Extraction Occupations	6,060	\$19.67	\$17.81	\$12.81	\$23.10
Management Analysts	5,650	\$27.74	\$23.63	\$19.31	\$31.95
Building and Grounds Cleaning and Maintenance Occupations	5,140	\$13.22	\$11.86	\$9.97	\$14.84
Healthcare Support Occupations	5,010	\$14.50	\$13.30	\$10.63	\$16.44
Protective Service Occupations	4,950	\$21.60	\$18.25	\$13.37	\$25.71
Retail Salespersons	4,770	\$14.01	\$11.79	\$9.79	\$16.12
Fast Food and Counter Workers	4,650	\$10.45	\$9.74	\$9.20	\$11.07
Community and Social Service Occupations	4,100	\$18.63	\$17.23	\$11.98	\$21.95
Cashiers	3,960	\$11.07	\$10.80	\$9.48	\$11.86
Office Clerks, General	3,950	\$14.97	\$13.54	\$10.44	\$17.24
Legal Occupations	3,530	\$40.99	\$31.73	\$18.38	\$52.30
Personal Care and Service Occupations	3,510	\$13.54	\$11.43	\$9.98	\$15.31
Registered Nurses	3,390	\$31.76	\$30.49	\$24.13	\$35.58
General and Operations Managers	3,200	\$45.50	\$37.23	\$23.00	\$56.76
Production Occupations	3,180	\$17.64	\$15.91	\$11.38	\$20.77
Secretaries and Admin. Assts., Except Legal, Med., and Exec.	3,140	\$17.26	\$16.36	\$12.81	\$19.49
Customer Service Representatives	2,970	\$16.06	\$15.18	\$11.31	\$18.43
Teaching Assistants, Postsecondary	2,890	NR	NR	NR	NR
Waiters and Waitresses	2,810	\$12.10	\$9.92	\$9.26	\$13.51
Janitors & Cleaners, Exc. Maids & Housekeeping Cleaners	2,540	\$12.77	\$11.71	\$10.04	\$14.13
Project Mgmt. Specialists & Bus. Ops. Specialists, All Other	2,510	\$34.40	\$29.80	\$18.21	\$42.50
Lawyers	2,150	\$48.98	\$38.14	\$25.22	\$60.86
Arts, Design, Entertainment, Sports, and Media Occupations	2,110	\$26.42	\$21.14	\$13.01	\$33.13
Architecture and Engineering Occupations	2,060	\$33.25	\$30.32	\$19.30	\$40.22



Workforce and Income

Occupational Employment and Wages

Occupations with Employment of 1,000+

Trend: The 2020 estimated average hourly wage for all occupations in the Tallahassee MSA was \$23.31, with an average wage of \$29.17 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2020	(2020 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Life, Physical, and Social Science Occupations	2,040	\$25.77	\$23.33	\$16.74	\$30.29
Accountants and Auditors	2,030	\$27.28	\$21.60	\$15.90	\$32.97
Compliance Officers	1,770	\$22.84	\$16.03	\$13.34	\$27.59
First-Line Supervisor of Office and Admin. Support Workers	1,760	\$29.62	\$25.79	\$17.75	\$35.56
Stockers and Order Fillers	1,760	\$13.15	\$12.51	\$10.83	\$14.31
Laborers and Freight, Stock, and Material Movers, Hand	1,700	\$13.52	\$12.94	\$10.86	\$14.86
Bookkeeping, Accounting, and Auditing Clerks	1,560	\$19.45	\$17.78	\$12.73	\$22.81
Maintenance and Repair Workers, General	1,540	\$17.35	\$16.07	\$12.26	\$19.89
Nursing Assistants	1,490	\$12.60	\$11.87	\$10.24	\$13.79
Computer Systems Analysts	1,400	\$29.14	\$26.72	\$20.85	\$33.28
Cooks, Restaurant	1,400	\$13.55	\$13.51	\$10.20	\$15.23
Food Preparation Workers	1,340	\$11.94	\$11.49	\$9.77	\$13.02
Receptionists and Information Clerks	1,330	\$13.07	\$12.82	\$10.10	\$14.56
First-Line Supervisors of Retail Sales Workers	1,310	\$22.61	\$21.18	\$15.31	\$26.26
First-Line Supervisors of Food Prep. and Serving Workers	1,300	\$16.89	\$16.34	\$12.39	\$19.15
Elementary School Teachers, Except Special Education	1,250	<i>\$46,902</i>	<i>\$46,755</i>	<i>\$34,749</i>	<i>\$52,978</i>
Teaching Assistants, Except Postsecondary	1,240	<i>\$27,048</i>	<i>\$26,642</i>	<i>\$22,517</i>	<i>\$29,313</i>
Light Truck Drivers	1,230	\$17.87	\$16.28	\$12.66	\$20.48
Cooks, Fast Food	1,220	\$10.65	\$9.94	\$9.05	\$11.44
Computer User Support Specialists	1,210	\$21.76	\$20.76	\$13.36	\$25.96
Software Dev. & Quality Assurance Analysts and Testers	1,210	\$47.90	\$39.30	\$25.56	\$59.08
Landscaping and Groundskeeping Workers	1,200	\$13.54	\$12.49	\$10.36	\$15.12
Correctional Officers and Jailers	1,160	\$19.16	\$16.99	\$15.29	\$21.10
Construction Laborers	1,120	\$14.26	\$13.91	\$10.98	\$15.90
Sales Rep. of Services, Exc. Advert., Ins., Fin. Svcs. & Travel	1,120	\$30.28	\$24.97	\$15.81	\$37.51
Home Health and Personal Care Aides	1,070	\$12.79	\$11.31	\$10.26	\$14.06
Automotive Service Technicians and Mechanics	1,030	\$21.76	\$20.82	\$13.24	\$26.02

* 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 13,000.

Name	Year Tax Exempt Status Granted	Internal Revenue Code Tax Exempt Status	Employees	Volunteers	Voting Board Members	Gross Receipts (\$ millions)
Capital Health Plan Inc	1982	501(c)(4)	492	–	12	\$1,096.6
Tallahassee Memorial Healthcare Inc	1979	501(c)(3)	6,175	875	16	\$786.7
Florida Healthy Kids Corp	1992	501(c)(3)	42	15	13	\$378.9
Florida Insurance Guaranty Assn Inc	1973	501(c)(6)	23	9	9	\$317.5
Florida Workers Compensation Insurance	1998	501(c)(3)	14	10	10	\$212.6
Florida State University Fdn Inc	1963	501(c)(3)	124	531	47	\$155.5
Big Bend Community Based Care Inc	2002	501(c)(3)	94	0	16	\$98.2
Florida Tourism Industry Marketing Corps	1996	501(c)(6)	156	29	29	\$91.0
Community Fdn of North Florida Inc	1997	501(c)(3)	4	15	15	\$88.2
Florida Agricultural & Mechanical Univ Fdn	1967	501(c)(3)	0	32	29	\$83.9
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	\$45.9
Florida Network of Youth and Family Services Inc	1994	501(c)(3)	14	15	15	\$39.7
Envision Credit Union	1970	501(c)(14)	278	12	7	\$38.7
First Commerce Credit Union	1972	501(c)(14)	217	12	7	\$36.6
Florida Education Assn	1976	501(c)(5)	132	164	15	\$36.4
Healthy Start Momcare Network Inc	2015	501(c)(3)	14	6	6	\$35.5
Florida Assn of Rehabilitation Facilities Inc	2007	501(c)(3)	20	20	18	\$33.0
The Ounce of Prevention Fund of Florida Inc	1989	501(c)(3)	41	10	10	\$32.8
Apalachee Center Inc	1967	501(c)(3)	654	–	14	\$31.7
Florida State University Research Fdn Inc	1995	501(c)(3)	0	0	9	\$31.1
Goodwill Industries Big Bend Inc	1970	501(c)(3)	1,569	0	21	\$28.2
Barbara Bush Fdn for Family Literacy Inc	2007	501(c)(3)	23	2,723	12	\$26.2
Florida Assn of Court Clerks	1978	501(c)(6)	126	20	15	\$25.7
Institute for Intergovernmental Research	1996	501(c)(3)	155	1	7	\$24.9
Early Learning Coalition of the Big Bend Region Inc	2003	501(c)(3)	45	120	21	\$24.4
Twin Oaks Juvenile Development Inc	1999	501(c)(3)	569	185	6	\$21.4
America's Second Harvest of the Big Bend	1989	501(c)(3)	33	2,529	15	\$20.9
Big Bend Hospice Inc	1983	501(c)(3)	340	277	20	\$20.8
Tallahassee Memorial Healthcare Fdn Inc	1977	501(c)(3)	0	245	35	\$19.5
Florida State University International Programs	1994	501(c)(3)	0	0	14	\$17.5



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 13,000.

Name	Year Tax Exempt Status Granted	Internal Revenue Code Tax Exempt Status	Employees	Volunteers	Voting Board Members	Gross Receipts (\$ millions)
CareerSource Florida Inc	2001	501(c)(3)	28	32	25	\$17.4
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)	19	20	8	\$16.6
Children's Forum Inc	1990	501(c)(3)	87	8	8	\$15.7
North Florida Medical Centers Inc	1979	501(c)(3)	199	–	11	\$15.3
Alfred B. Maclay Jr. Day School	1967	501(c)(3)	315	100	18	\$15.3
Big Bend Cares Inc	1987	501(c)(3)	51	244	17	\$14.4
Fish & Wildlife Fdn of Florida Inc	1995	501(c)(3)	7	0	21	\$13.8
Foundation for Excellence in Education Inc	2007	501(c)(3)	62	12	10	\$13.8
Florida Sheriffs Assn Inc	1984	501(c)(3)	34	22	22	\$13.6
FSU Financial Assistance Inc	1985	501(c)(3)	0	4	10	\$13.1
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
Florida Assn of Healthy Start Coalitions Inc	1996	501(c)(3)	9	30	30	\$12.3
Florida Police Benevolent Assn Inc	1975	501(c)(5)	75	62	175	\$11.9
Tall Timbers Research Inc	1958	501(c)(3)	109	0	20	\$11.3
DISC Village Inc	1972	501(c)(3)	240	64	5	\$10.5
Miracle Hill Nursing & Rehabilitation Center	1968	501(c)(3)	294	20	8	\$10.4

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

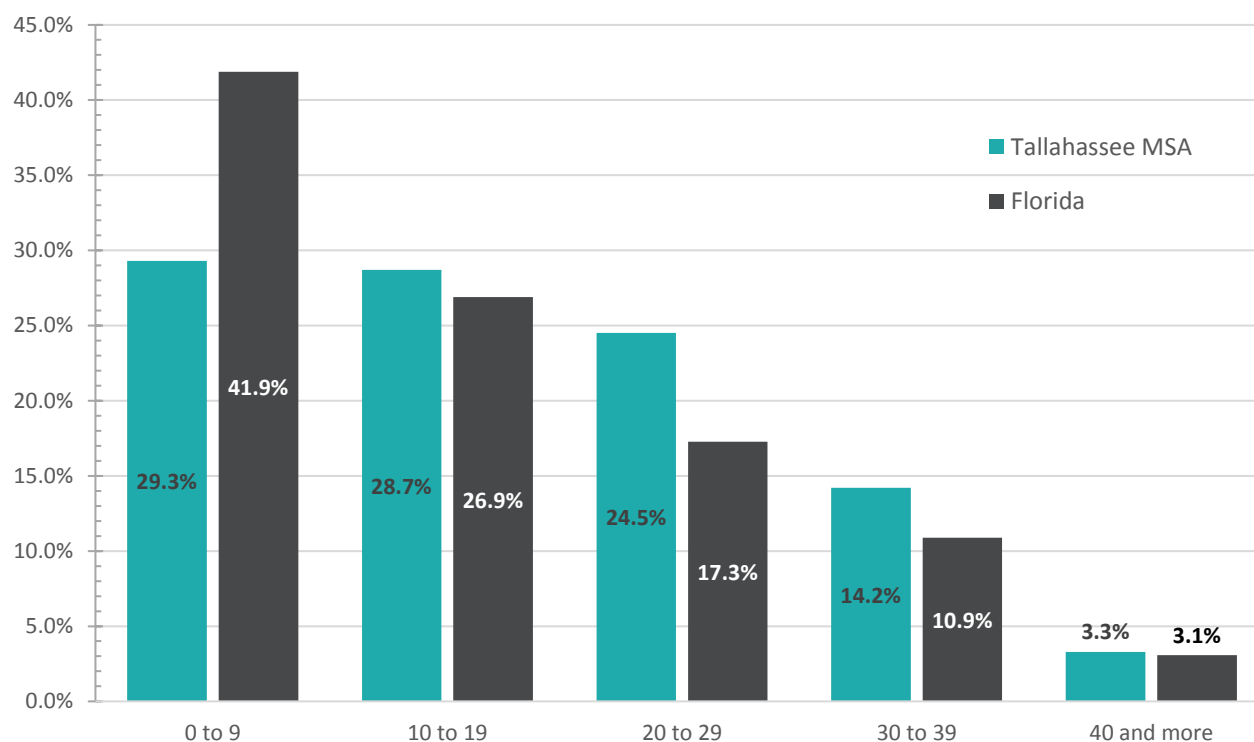
Trend: Professional Engineers (PEs) have an essential role in a community's economic development and redevelopment. Their education, experience, and professional obligations for protecting public health and safety place them in the vanguard of innovation for public infrastructure and private-sector development. Of the nearly 700 active PEs in the Tallahassee MSA, 42% have 20 years of experience or more, compared to only 31% among all Florida PEs.

Years Experience	Tallahassee MSA		Florida	
	Number	Percent	Number	Percent
0 to 9	196	29.3%	13,848	41.9%
10 to 19	192	28.7%	8,891	26.9%
20 to 29	164	24.5%	5,709	17.3%
30 to 39	95	14.2%	3,602	10.9%
40 and more	22	3.3%	1,016	3.1%
Total	669	100.0%	33,066	100.0%

Note: Percentages may not sum to 100.0% due to rounding. Professional Engineers current and active as of August 2020.

Source: Florida Department of Business and Professional Regulation

Professional Engineers in Tallahassee MSA and Florida, Years Licensed



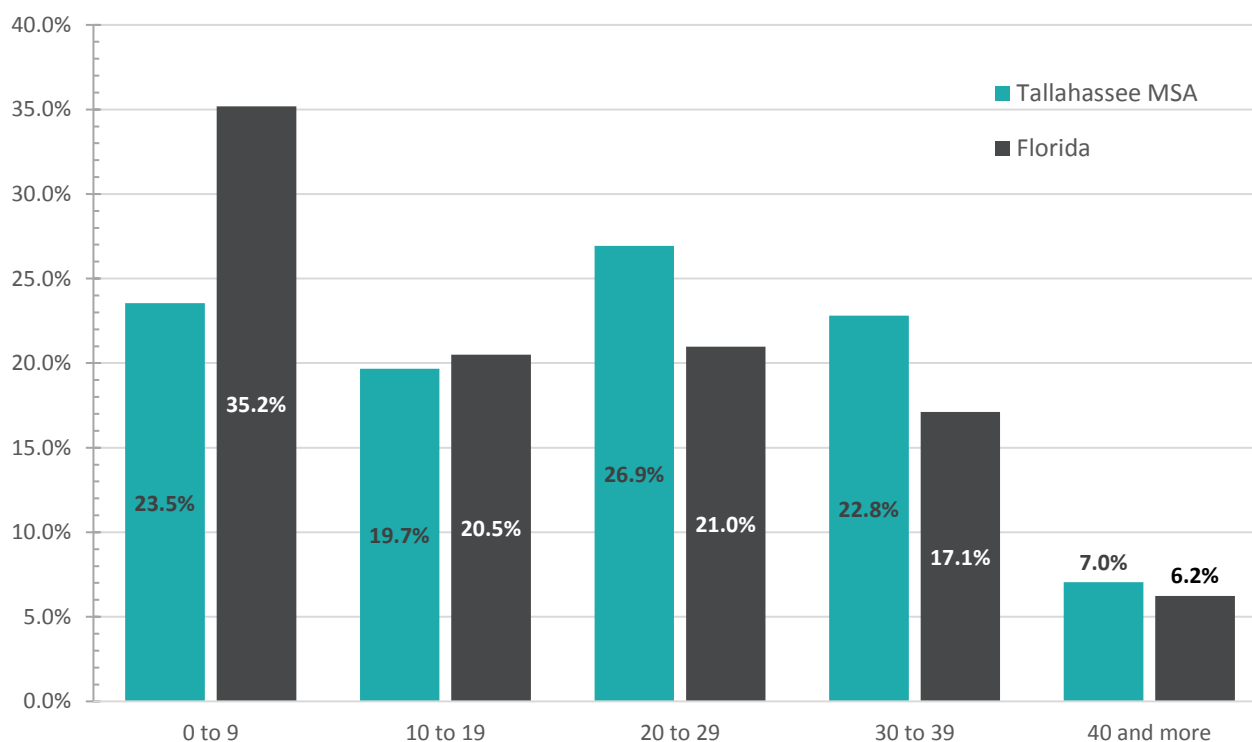
Trend: Certified Public Accountants (CPAs) analyze and plan how money is used by businesses, nonprofit organizations, governments, and individuals. CPAs perform vital functions in economic development by preparing financial statements, evaluating investments, performing cost analyses, and detecting fraud. Of the over 800 active CPAs in the Tallahassee MSA, 57% have 20 years of experience or more, compared to about 44% statewide.

Years Experience	Tallahassee MSA		Florida	
	Number	Percent	Number	Percent
0 to 9	194	23.5%	9,965	35.2%
10 to 19	162	19.7%	5,805	20.5%
20 to 29	222	26.9%	5,940	21.0%
30 to 39	188	22.8%	4,849	17.1%
40 and more	58	7.0%	1,764	6.2%
Total	824	100.0%	28,323	100.0%

Note: Percentages may not sum to 100.0% due to rounding. Certified Public Accountants current and active in Florida as of August 2021.

Source: Florida Department of Business and Professional Regulation

Certified Public Accountants in Tallahassee MSA and Florida, Years Licensed



Economic Factors

Real Gross Domestic Product by Metro Area

(\$ billions and percent change from previous year)

Trend: In 2019, the Tallahassee Metropolitan Area's (MSA) Real Gross Domestic Product (GDP) was \$16.6 billion, up 2.3% from 2018, trailing Florida's Real GDP growth rate of 2.8% but exceeding the overall 2.2% growth rate for the US, and placing the Tallahassee MSA 20th among Florida's 22 metro areas.

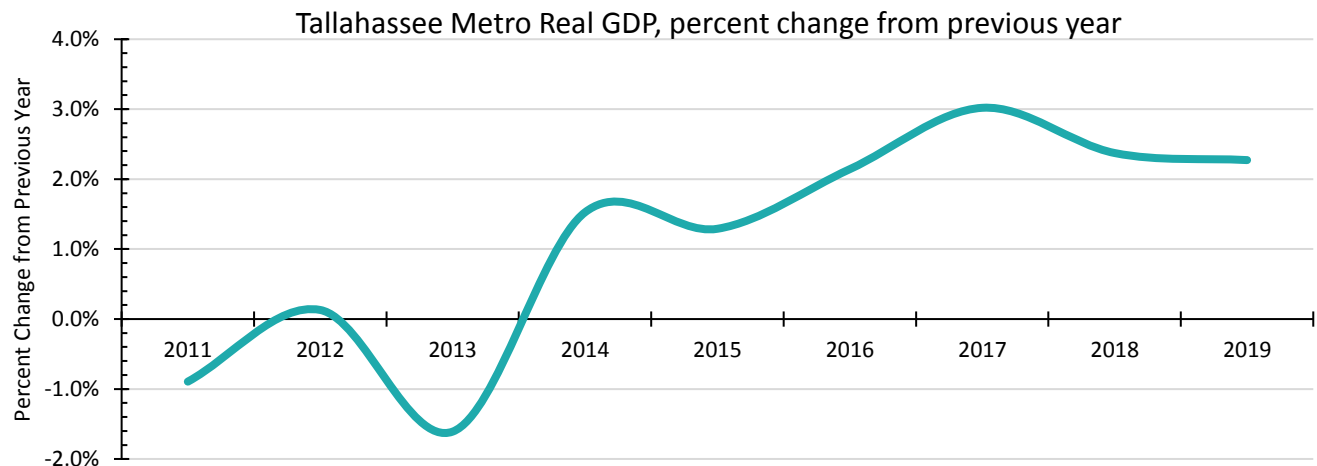
Real GDP (\$ billions, in chained 2012 dollars)

Metro Area	2011	2012	2013	2014	2015	2016	2017	2018	2019
Madison, WI	36.7	37.5	38.1	39.4	41.1	42.4	43.2	45.1	46.3
Greenville, SC	33.5	33.7	34.9	36.1	37.6	38.6	39.8	41.4	42.4
Little Rock, AR	31.7	31.7	31.9	32.0	32.5	32.6	32.7	33.2	33.5
Trenton, NJ	26.8	28.4	28.5	28.1	28.7	29.7	29.7	30.1	31.5
Lansing, MI	21.0	20.6	20.6	21.0	21.9	22.8	23.2	23.6	23.8
Lincoln, NE	16.2	16.3	16.4	16.5	17.1	17.4	17.7	18.2	19.1
Pensacola, FL	15.0	15.1	15.1	15.7	16.2	16.4	17.4	17.6	17.9
Tallahassee, FL	14.9	14.9	14.7	14.9	15.1	15.4	15.9	16.3	16.6
Montgomery, AL	15.6	15.6	15.6	15.4	15.7	16.0	15.9	16.0	16.2
Gainesville, FL	12.0	12.0	12.0	12.4	12.7	13.1	13.4	13.8	14.2
Athens, GA	7.5	7.7	7.9	8.1	8.3	8.5	8.9	9.3	9.2

Percent Change from Previous Year

Metro Area	2011	2012	2013	2014	2015	2016	2017	2018	2019
Madison, WI	3.1%	2.2%	1.4%	3.5%	4.2%	3.4%	1.9%	4.4%	2.6%
Greenville, SC	4.6%	0.8%	3.5%	3.4%	4.2%	2.8%	3.0%	4.0%	2.5%
Little Rock, AR	1.7%	0.0%	0.8%	0.4%	1.4%	0.3%	0.4%	1.5%	0.9%
Trenton, NJ	0.3%	5.9%	0.5%	-1.2%	2.0%	3.5%	-0.1%	1.5%	4.5%
Lansing, MI	-1.5%	-1.8%	0.2%	1.9%	4.3%	3.8%	1.8%	1.9%	1.0%
Lincoln, NE	0.7%	0.1%	0.9%	0.4%	4.0%	1.5%	1.6%	3.0%	4.7%
Pensacola, FL	0.7%	0.8%	0.3%	4.0%	2.8%	1.7%	5.7%	1.2%	1.9%
Tallahassee, FL	-0.9%	0.1%	-1.6%	1.5%	1.3%	2.1%	3.0%	2.4%	2.3%
Montgomery, AL	1.3%	0.2%	0.1%	-1.3%	2.0%	1.9%	-0.5%	0.6%	0.9%
Gainesville, FL	-1.7%	0.2%	0.5%	3.0%	2.7%	2.7%	2.3%	3.5%	2.6%
Athens, GA	-0.4%	3.6%	1.9%	2.4%	3.4%	1.6%	5.5%	4.1%	-1.7%

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





Economic Factors

Productivity

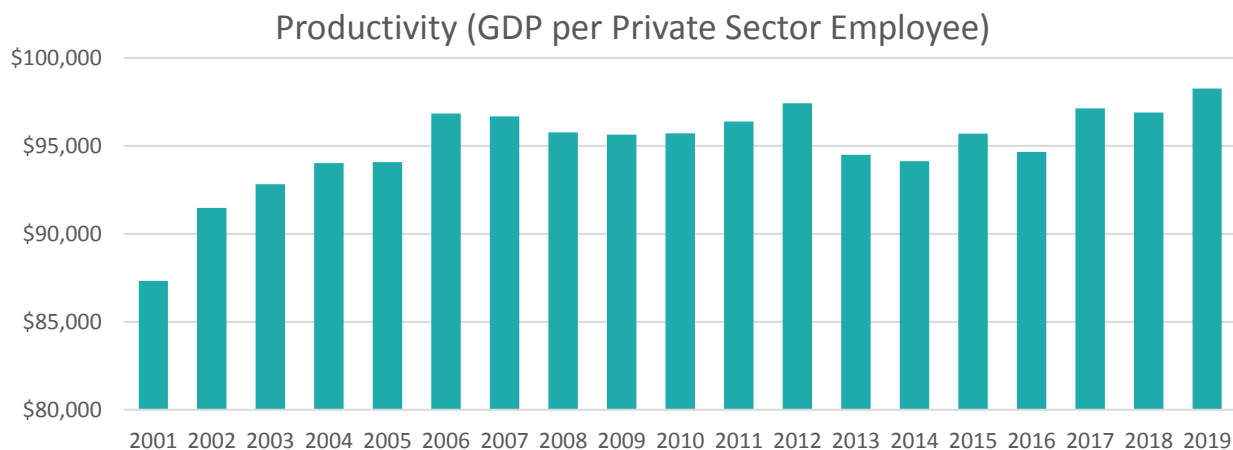
GDP per Private Sector Employee, Tallahassee MSA

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% between 2013 and 2014 to a high of 4.6% 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	\$8,864	101,500	\$87,331	
2002	\$9,175	100,300	\$91,471	4.6%
2003	\$9,394	101,200	\$92,829	1.5%
2004	\$9,769	103,900	\$94,025	1.3%
2005	\$10,254	109,000	\$94,071	0.0%
2006	\$10,914	112,700	\$96,841	2.9%
2007	\$11,002	113,800	\$96,681	-0.2%
2008	\$10,804	112,800	\$95,780	-0.9%
2009	\$10,349	108,200	\$95,644	-0.1%
2010	\$10,166	106,200	\$95,721	0.1%
2011	\$10,197	105,800	\$96,383	0.7%
2012	\$10,289	105,600	\$97,434	1.1%
2013	\$10,112	107,000	\$94,508	-3.0%
2014	\$10,393	110,400	\$94,140	-0.4%
2015	\$10,728	112,100	\$95,698	1.6%
2016	\$11,094	117,200	\$94,657	-1.1%
2017	\$11,520	118,600	\$97,130	2.6%
2018	\$11,851	122,300	\$96,898	-0.2%
2019	\$12,254	124,700	\$98,271	1.4%

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.





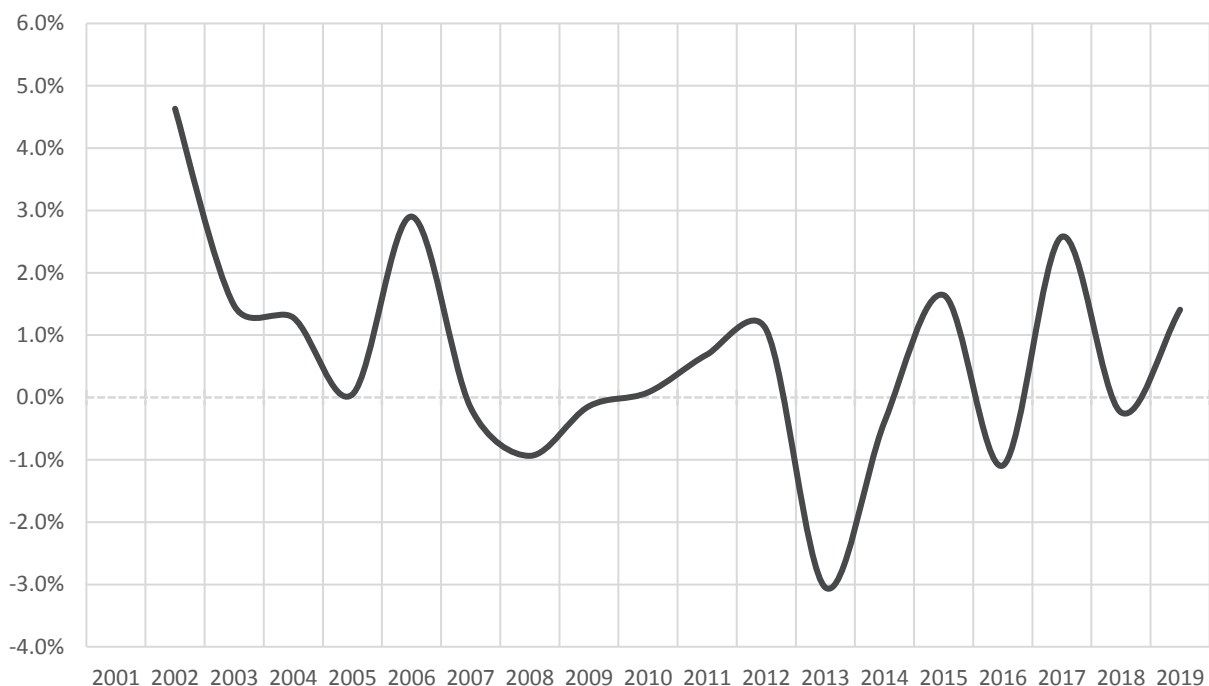
Economic Factors

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% between 2013 and 2014 to a high of 4.6% from 2001 to 2002.

Productivity Change from Prior Year





Economic Factors

Exports from Tallahassee MSA

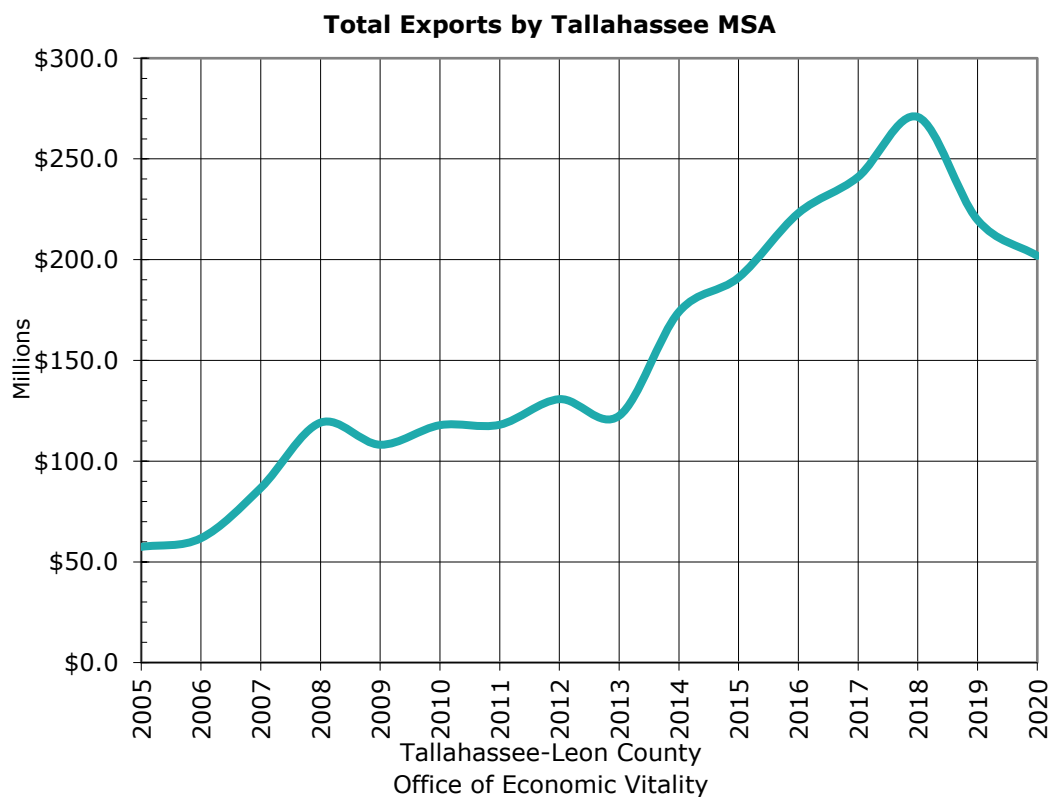
Total Merchandise Exports

Trend: Between 2010 and 2020, total merchandise exports from Tallahassee MSA grew by more than 70%, with an average annual growth rate around 7%. Tallahassee accounts for approximately 0.4% of Florida's total exports.

Year	Total Exports	% Change from Previous Year
2005	\$57,423,563	
2006	\$61,748,645	7.5%
2007	\$86,658,732	40.3%
2008	\$119,097,860	37.4%
2009	\$108,127,019	-9.2%
2010	\$117,844,974	9.0%
2011	\$118,059,725	0.2%
2012	\$130,752,507	10.8%
2013	\$122,502,739	-6.3%
2014	\$174,044,413	42.1%
2015	\$191,154,966	9.8%
2016	\$223,095,711	16.7%
2017	\$241,077,190	8.1%
2018	\$270,831,143	12.3%
2019	\$219,695,001	-18.9%
2020	\$201,905,854	-8.1%

Note: Current dollars, not adjusted for inflation.

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



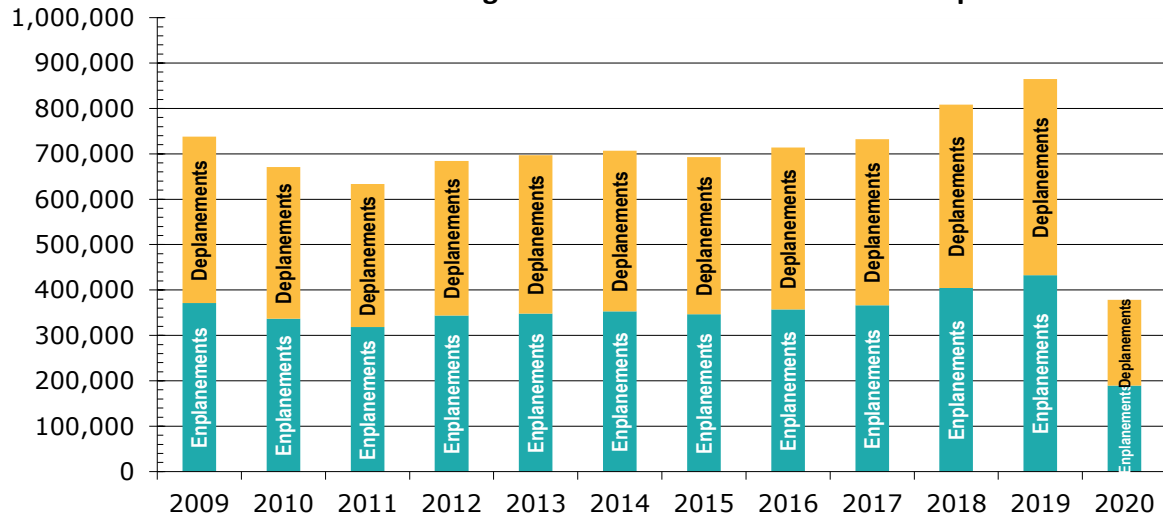
Economic Factors
Airport Traffic Statistics
Total Passengers at TLH

Trend: Passenger traffic at Tallahassee International Airport in 2020 fell by 56% compared to 2019. Traffic in 2019 was 18% higher than the 2014-2018 annual average.

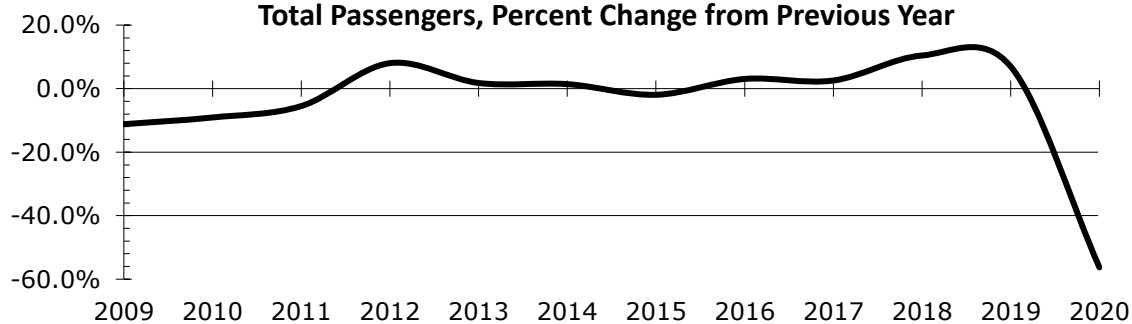
Year	Enplanements	Deplanements	Total Passengers	Percent Change from Previous Year
2009	371,106	366,579	737,685	-11.2%
2010	336,598	334,099	670,697	-9.1%
2011	318,172	315,619	633,791	-5.5%
2012	344,078	340,533	684,611	8.0%
2013	348,185	348,539	696,724	1.8%
2014	353,253	353,275	706,528	1.4%
2015	346,992	345,857	692,849	-1.9%
2016	357,579	356,407	713,986	3.1%
2017	366,408	365,827	732,235	2.6%
2018	404,807	403,806	808,613	10.4%
2019	432,845	431,960	864,805	6.9%
2020	189,454	188,683	378,137	-56.3%

Source: Tallahassee International Airport

Total Passengers at Tallahassee International Airport



Total Passengers, Percent Change from Previous Year



Economic Factors

Air Freight

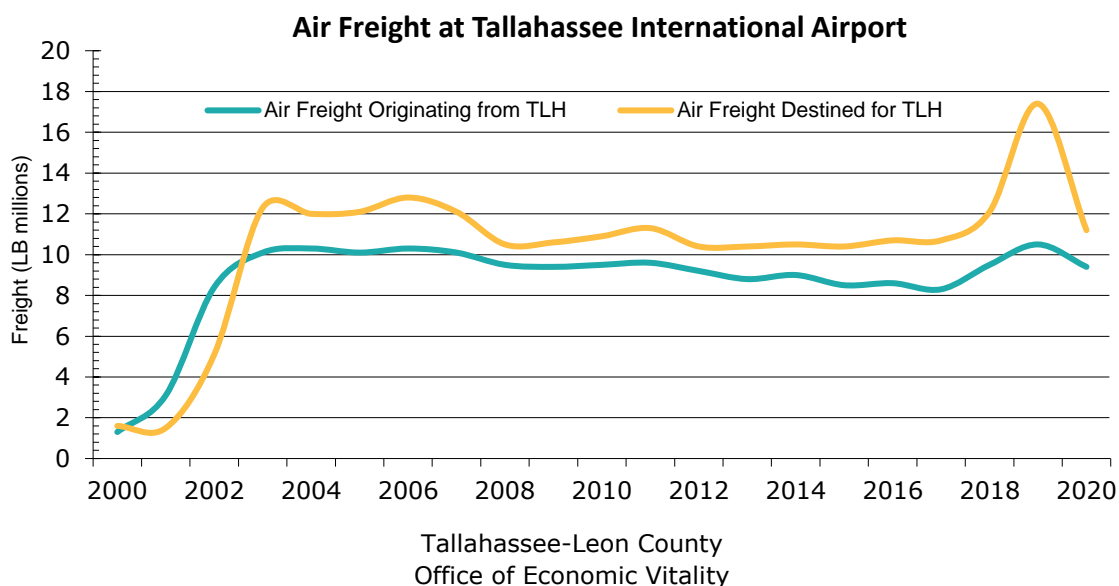
Total Air Freight at TLH

In 2020, 9.4M pounds of air freight originated from Tallahassee International Airport, with 93% destined for Memphis, TN. That year, 11.2M pounds of inbound air freight arrived at TLH, with 92% originating from Memphis, TN.

Year	Air Freight Originating from TLH	Air Freight Destined for TLH	Air Freight Handled	Percent Change from Previous Year
2000	1.3	1.6	2.9	—
2001	3.1	1.5	4.6	59%
2002	8.4	5.1	13.5	193%
2003	10.1	12.3	22.4	66%
2004	10.3	12	22.3	<-1%
2005	10.1	12.1	22.2	<-1%
2006	10.3	12.8	23.1	4%
2007	10.1	12.1	22.2	-4%
2008	9.5	10.5	20.0	-10%
2009	9.4	10.6	20.0	~0%
2010	9.5	10.9	20.4	2%
2011	9.6	11.3	20.9	2%
2012	9.2	10.4	19.6	-6%
2013	8.8	10.4	19.2	-2%
2014	9.0	10.5	19.5	2%
2015	8.5	10.4	18.9	-3%
2016	8.6	10.7	19.3	2%
2017	8.3	10.7	19.0	-2%
2018	9.5	12.1	21.6	14%
2019	10.5	17.4	27.9	29%
2020	9.4	11.2	20.6	-26%

Note: Air Freight in millions of pounds.

Source: US Department of Transportation, Bureau of Transportation Statistics



Trend: In FY 2020, Leon County had 1,683,041 visitors, down 31% from FY 2019. Direct expenditures of visitors amounted to \$484.9 million in FY 2020, a decrease of 26% from FY 2019, although expenditures per visitor were up 6.6% from FY 2019.

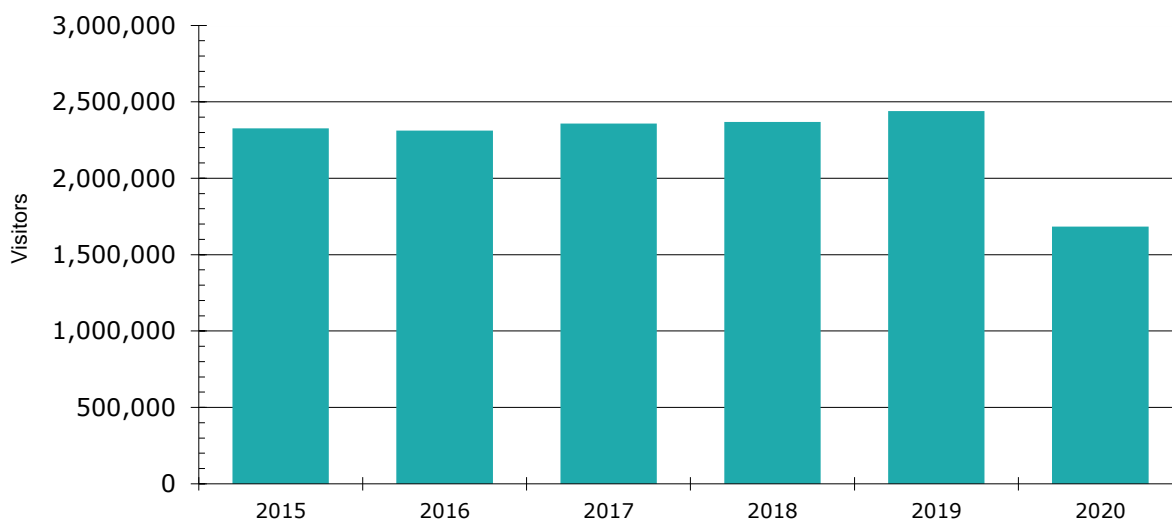
Fiscal Year*	Visitors	Direct Expenditures (\$ millions)	Total Economic Impact (\$ millions)
2015	2,326,769	\$531.6	\$763.1
2016	2,312,120	\$532.5	\$771.3
2017	2,358,833	\$566.9	\$895.8
2018	2,368,988	\$576.2	\$910.2
2019	2,438,959	\$659.1	\$1,041.7
2020	1,683,041	\$484.9	\$766.2

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

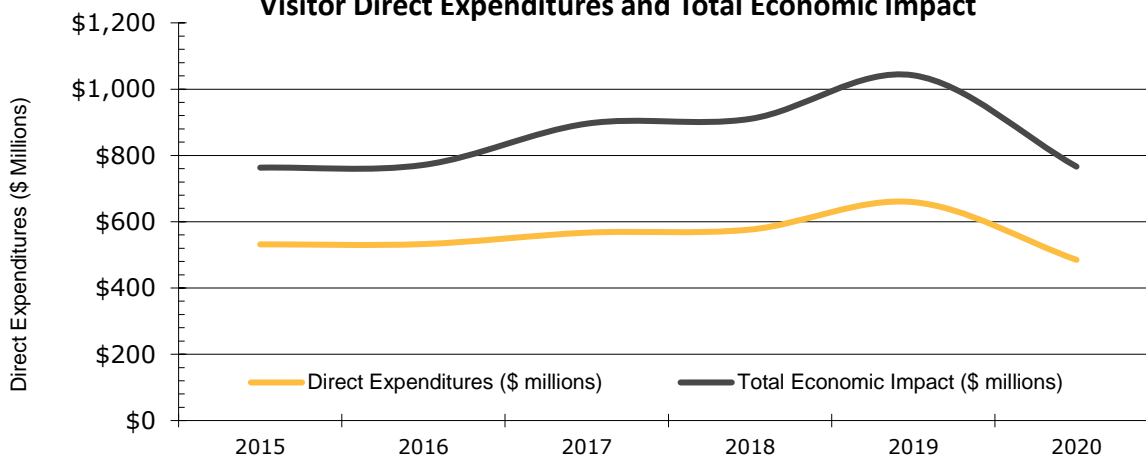
* Fiscal Year is October 1 to September 30.

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 2020, Leon County had 1,683,041 visitors, down 31% from FY 2019. Direct expenditures of visitors amounted to \$484.9 million in FY 2020, a decrease of 26% from FY 2019, although expenditures per visitor were up 6.6% from FY 2019.

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

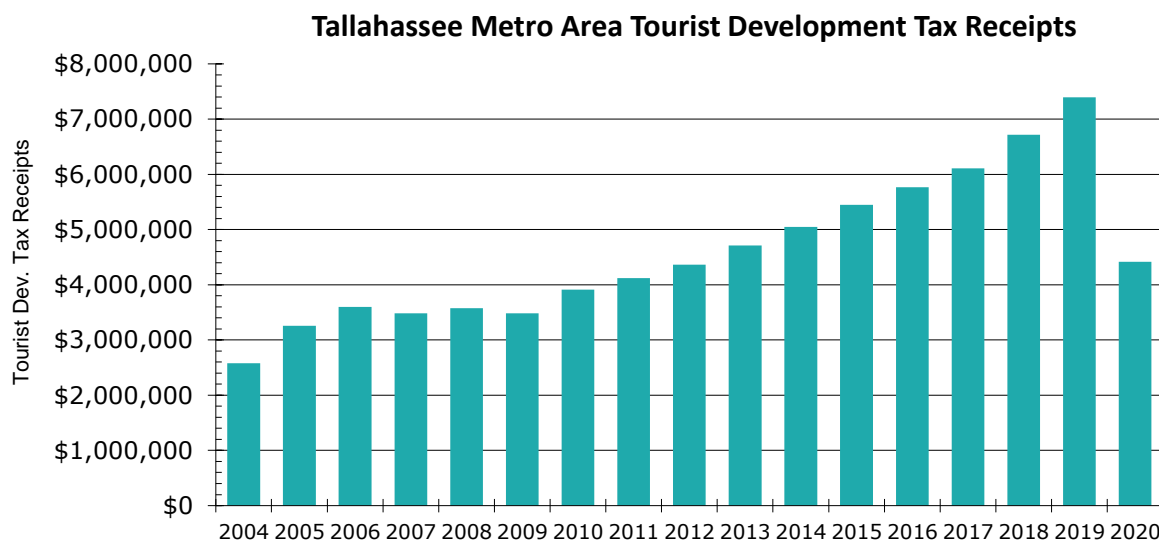
Tourism

Tourist Development Tax Receipts

The tourist development tax is a local option tax based on the total payment received for the rental or lease of living quarters and accommodations rented for six months or less. This includes hotels, apartment-hotels, motels, resort motels, rooming houses, tourist or trailer camps, cooperatively-owned apartments, multiple-unit structures, mobile homes, trailers, single-family dwellings, beach houses, cottages and condominiums.

Year	MSA Tourist Development Tax Receipts	Change from Prior Year	Percent Change from Prior Year
2004	\$2,578,331		
2005	\$3,259,787	\$681,455	26.4%
2006	\$3,597,718	\$337,931	10.4%
2007	\$3,481,604	-\$116,113	-3.2%
2008	\$3,572,862	\$91,257	2.6%
2009	\$3,480,221	-\$92,640	-2.6%
2010	\$3,910,069	\$429,847	12.4%
2011	\$4,120,371	\$210,303	5.4%
2012	\$4,361,077	\$240,705	5.8%
2013	\$4,709,404	\$348,327	8.0%
2014	\$5,045,033	\$335,629	7.1%
2015	\$5,450,052	\$405,020	8.0%
2016	\$5,764,106	\$314,053	5.8%
2017	\$6,110,324	\$346,218	6.0%
2018	\$6,719,017	\$608,693	10.0%
2019	\$7,392,072	\$673,055	10.0%
2020	\$4,417,804	-\$2,974,268	-40.2%

Source: Florida Department of Revenue





Economic Factors

Taxable Sales:

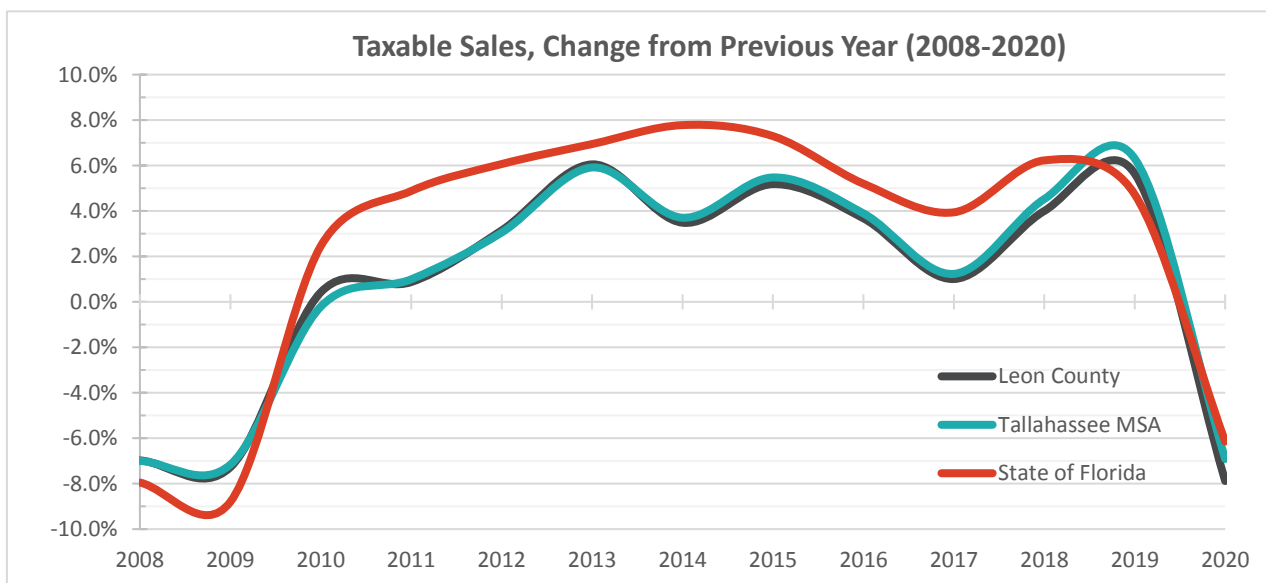
Annual Taxable Sales, Change from Previous Year

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 decreased 6.9% in the Tallahassee MSA in 2020. Taxable sales for the State of Florida were down 6.1% in 2020 compared with 2019.

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	\$4,627.5	5.6%	\$5,336.1	6.3%	\$473,808.9	4.7%
2020	\$4,262.7	-7.9%	\$4,967.2	-6.9%	\$444,703.9	-6.1%

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

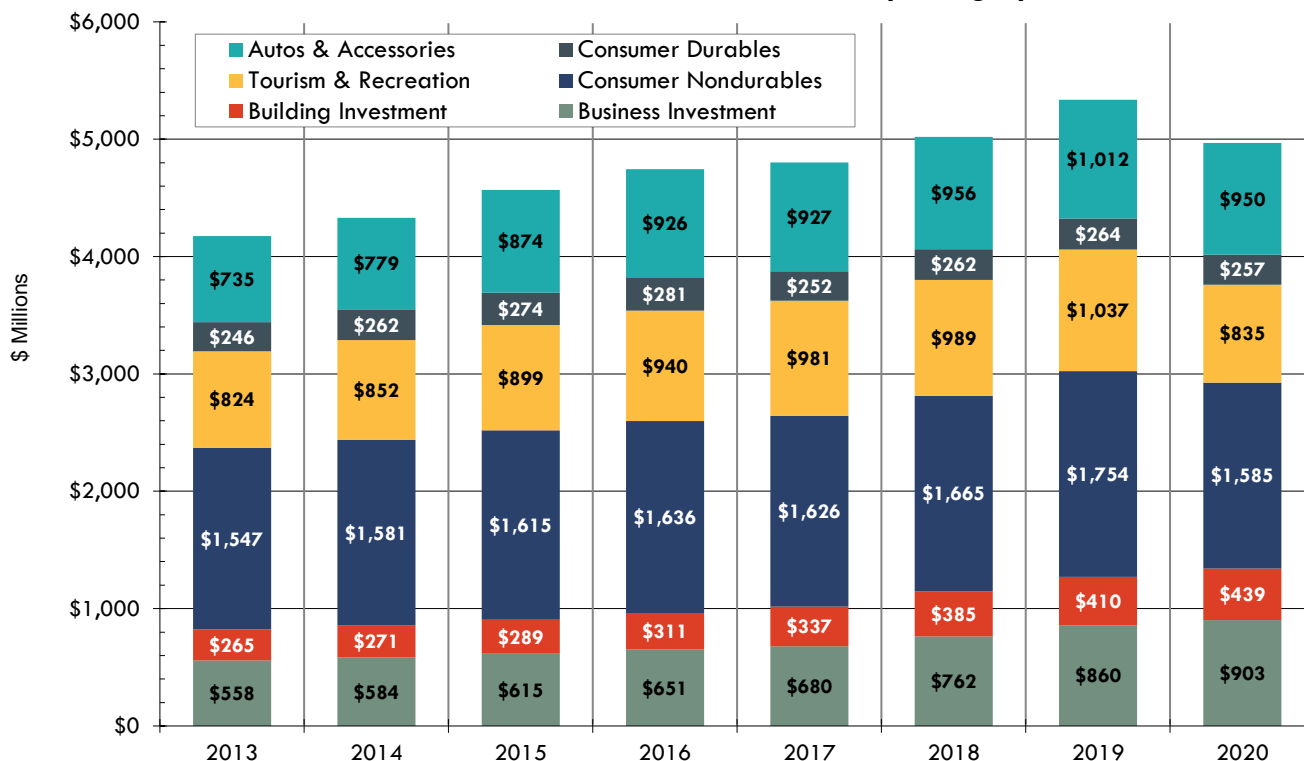
Trend: For the Tallahassee MSA, two of the six categories exhibited an increase in taxable sales each year between 2013 and 2020: Business Investment and Building Investment. Building Investment increased on average 7.2% each year; Business Investment, 7.8%; Autos & Accessories, 3.9%; Tourism & Recreation, 0.6%; Consumer Nondurables, 3.6%; Consumer Durables, 0.8%. Taxable sales make up an estimated 40-45% of all retail sales.

Category	2013	2014	2015	2016	2017	2018	2019	2020
Autos & Accessories	\$734.7	\$778.9	\$874.3	\$925.5	\$926.6	\$955.9	\$1,012.3	\$949.5
Consumer Durables	\$246.1	\$262.1	\$274.3	\$280.5	\$251.5	\$262.0	\$264.1	\$256.6
Tourism & Recreation	\$824.1	\$852.0	\$898.7	\$939.7	\$981.2	\$989.2	\$1,036.7	\$834.7
Consumer Nondurables	\$1,546.9	\$1,581.0	\$1,615.1	\$1,636.1	\$1,626.3	\$1,665.3	\$1,753.5	\$1,585.1
Building Investment	\$265.1	\$271.0	\$288.7	\$310.9	\$337.0	\$385.0	\$409.6	\$438.7
Business Investment	\$557.6	\$584.2	\$615.1	\$651.3	\$679.7	\$762.3	\$859.8	\$902.5
TOTAL	\$4,174.5	\$4,329.2	\$4,566.2	\$4,744.0	\$4,802.3	\$5,019.7	\$5,336.1	\$4,967.1

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

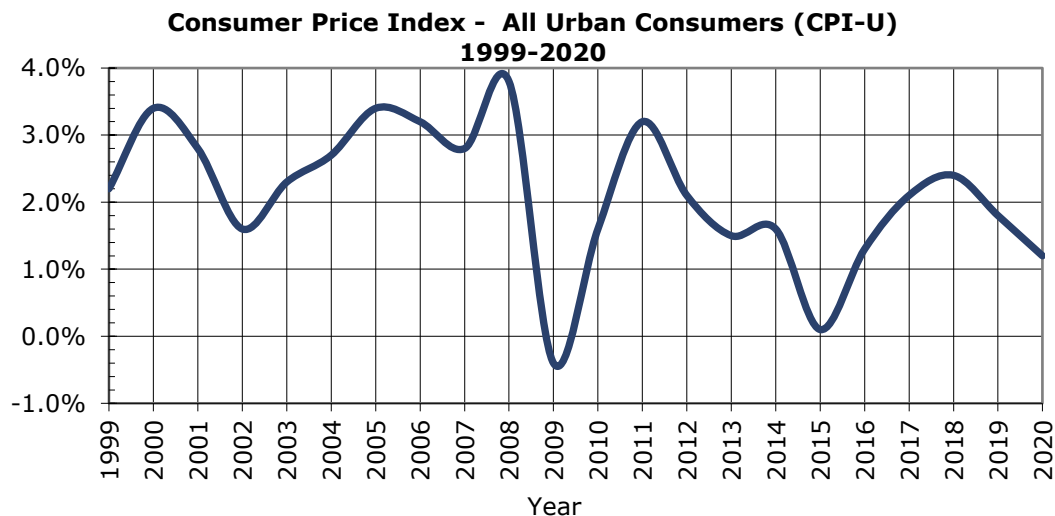
Consumer Price Index (CPI-U)

Annual Change in Consumer Price Index

Trend: The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 1.2% in 2020, the smallest annual increase since 2015.

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%
2020	258.8	1.2%

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





Economic Factors

Bank Deposits:

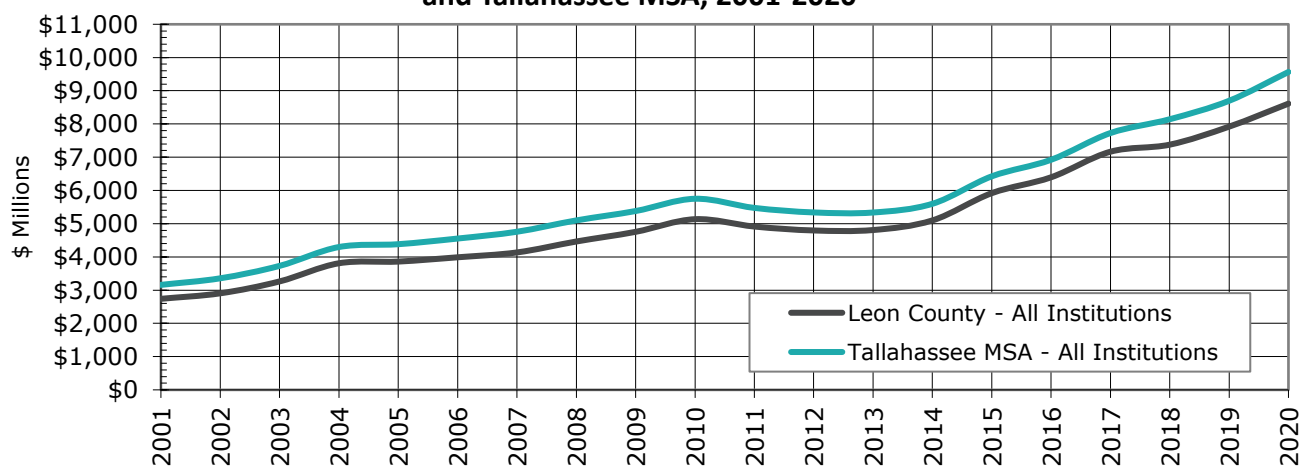
FDIC Summary of Deposits

Trend: Over \$8.6 billion in deposits were held in Leon County in FDIC-insured institutions as of June 30, 2020. Total Leon County deposits increased 8.4% between 2019 and 2020. 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 2001-2020, Tallahassee metro area bank deposits accounted for about 1.4% 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
2020	17	72	\$8,612	17	81	\$9,565	196	4,775	\$708,385

Source: FDIC, Summary of Deposits

**FDIC Summary of Deposits, Leon County
and Tallahassee MSA, 2001-2020**



Economic Factors

C2ER Annual Cost of Living Index

Trend: In 2020, the Tallahassee urban area captured an overall composite index of 97.0%, or 3% below the average cost of living for all participating urban areas.

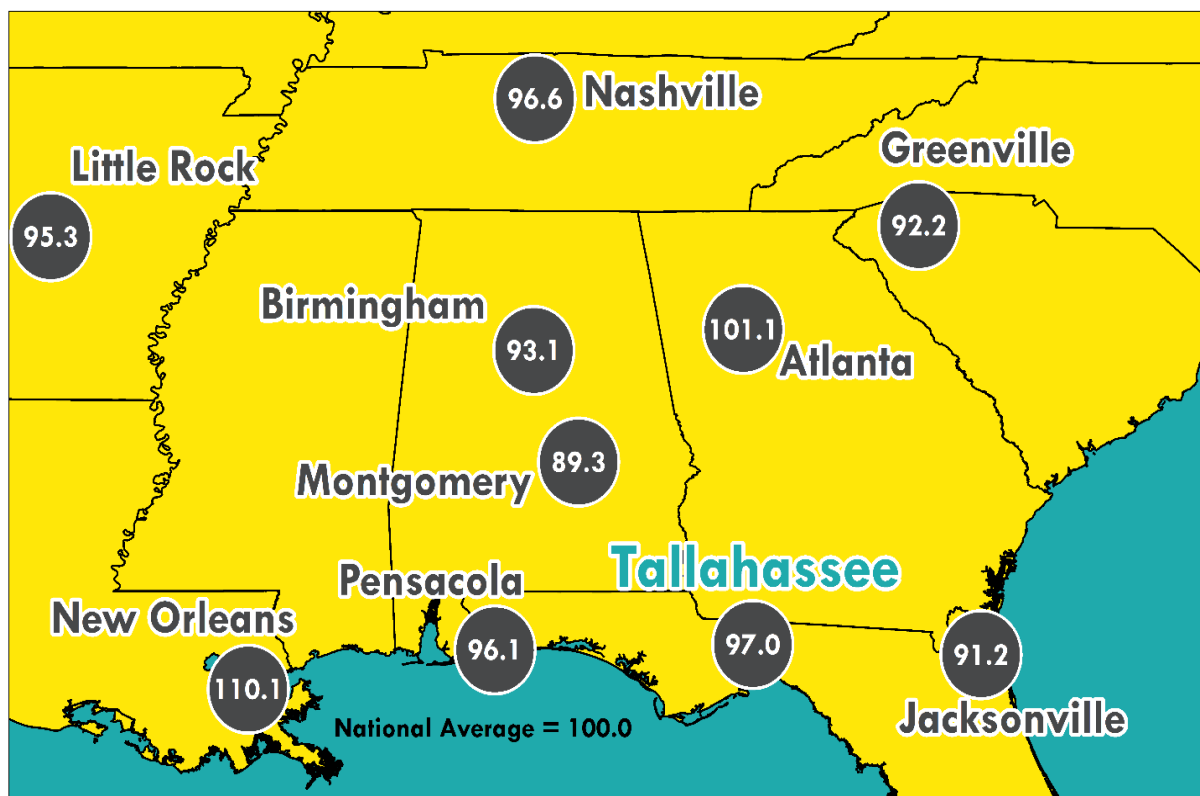
The Annual Cost of Living Index (COLI) is released by the Council for Community and Economic Research (C2ER) to measure regional differences in the cost of consumer goods and services (like grocery items, healthcare, and housing), excluding taxes and non-consumer expenditures, for professional and managerial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

Urban Area	All Items	Groceries	Housing	Utilities	Transportation	Healthcare	Misc. Goods & Services
Jacksonville, FL	89.3	96.6	79.3	100.0	91.3	82.9	91.7
Pensacola, FL	91.2	99.9	84.3	98.4	86.4	84.7	93.3
Greenville, SC	92.2	101.9	75.5	95.4	96.0	95.9	99.2
Birmingham, AL	93.1	94.2	78.8	101.5	95.0	91.7	101.4
Little Rock, AR	95.3	91.9	87.4	95.2	91.8	91.2	104.5
Montgomery, AL	96.1	96.8	89.3	120.6	96.6	92.8	95.0
Nashville, TN	96.6	100.2	92.3	92.7	94.6	95.3	100.2
<i>Tallahassee, FL</i>	97.0	109.3	92.3	87.1	109.9	104.4	96.3
Atlanta, GA	101.2	105.0	102.8	84.7	102.0	102.0	102.3
New Orleans, LA	110.1	100.1	136.4	75.5	97.8	116.2	104.8

Note: Gainesville, FL does not participate in COLI.

Source: Council for Community and Economic Research (C2ER)

2020 Cost of Living Index

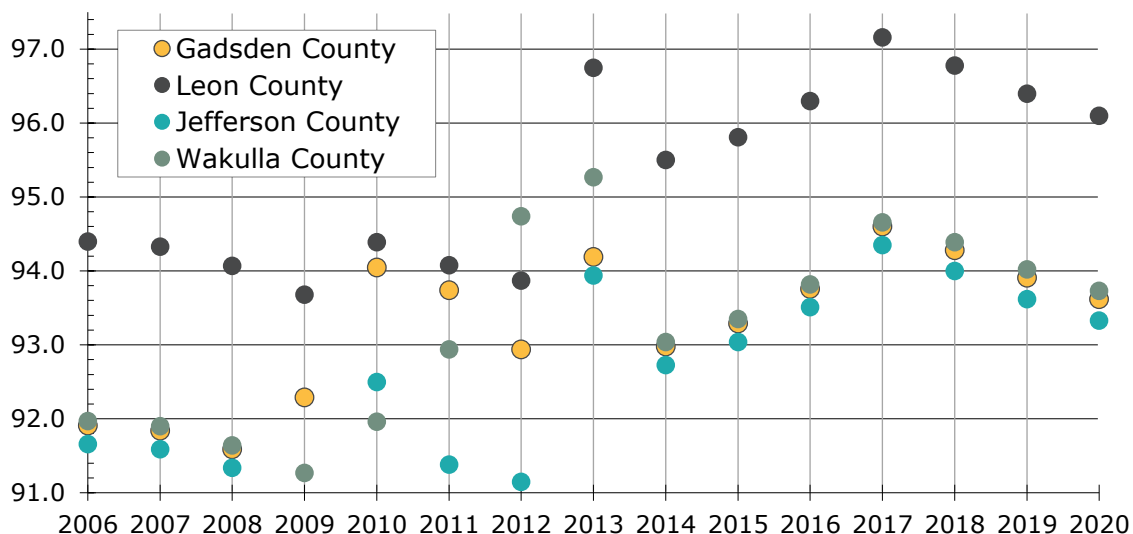


Trend: The Florida Price Level Index (FPLI) was established by the Legislature as the basis for the District Cost Differential (DCD) in the Florida Education Finance Program. It represents the costs of hiring comparable personnel across school districts. Extensive data on wages is used to estimate the relative cost of hiring comparable workers among Florida's 67 counties in a given year. The median Floridian, ranked by 2020 county FPLI, lives in Hillsborough County, with an index value of 100.73. That is, less than half of Floridians live in counties with index values greater than 100.73, less than half live in counties with index values less than 100.73, and the rest live in Hillsborough County. 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
2020	96.10	93.62	93.33	93.73

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 (2006-2020)

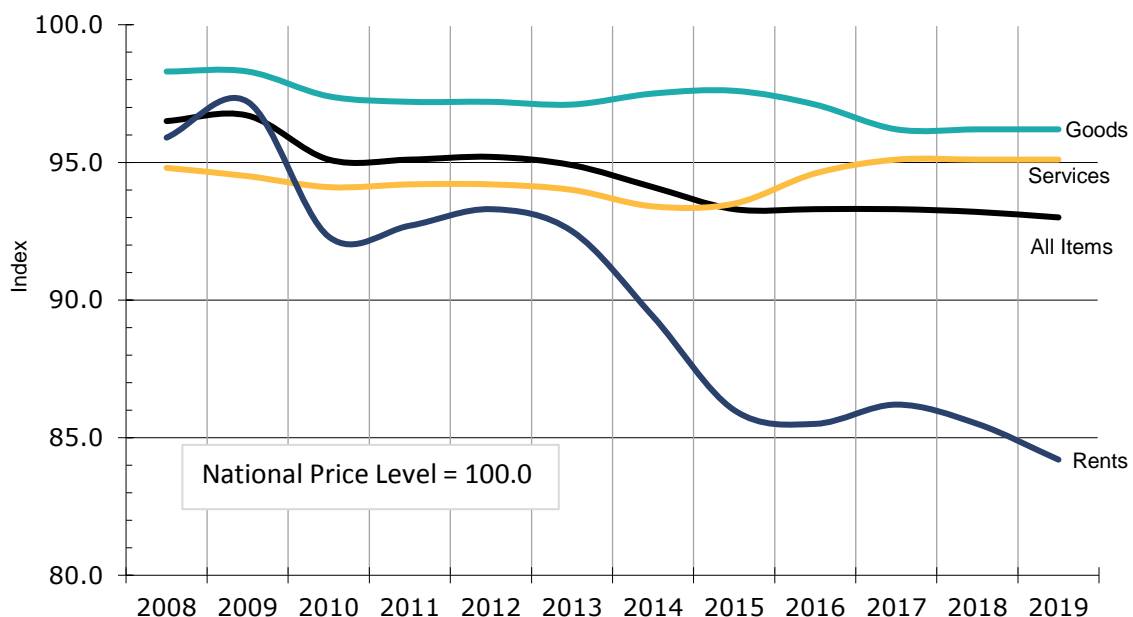


Trend: Regional Price Parities (RPPs) are regional price levels expressed as a percentage of the overall national price level for a given year. The price levels are determined by the average prices paid by consumers for the mix of goods and services consumed in each region. Taking the ratio of RPPs shows 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	93.3	96.2	95.1	86.2
2018	93.2	96.2	95.1	85.5
2019	93.0	96.2	95.1	84.2

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

Regional Price Parities for Tallahassee MSA



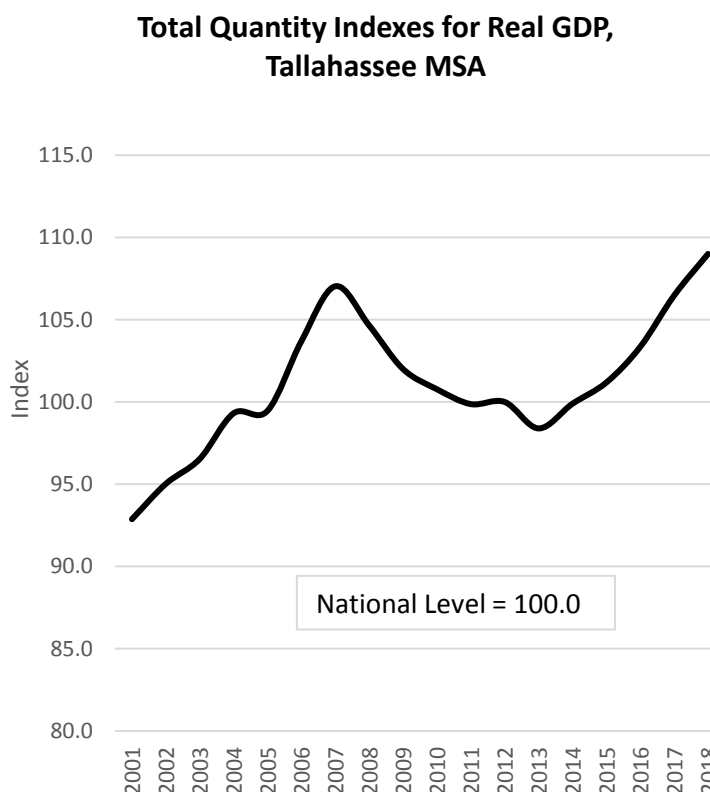


Economic Factors

Total Quantity Indexes for Real GDP

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

Year	Indexes for Real GDP
2001	92.9
2002	95.0
2003	96.5
2004	99.3
2005	99.5
2006	103.7
2007	107.0
2008	104.7
2009	102.0
2010	100.8
2011	99.9
2012	100.0
2013	98.4
2014	99.9
2015	101.2
2016	103.4
2017	106.5
2018	109.0
2019	111.5



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

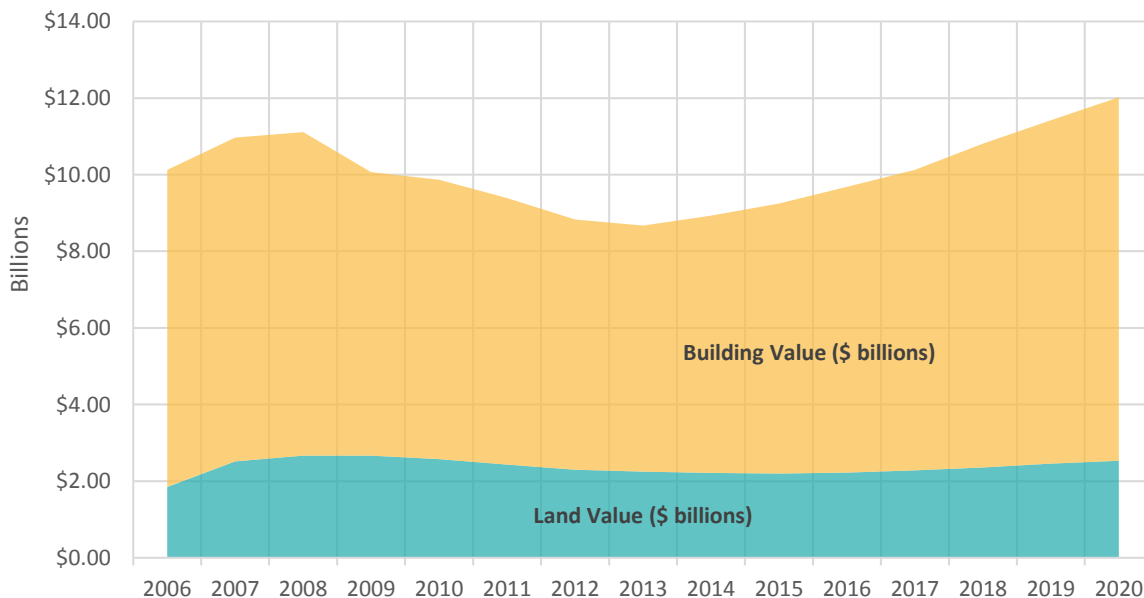
Trend: Residential property investment is a widespread method for local capital accumulation. Since 2016, acreage with homestead exemption has averaged 60,775 acres. Building value accounted for an average of 78% of total market value among homestead exempted properties since 2016. During 2016-2020, average annual growth in total market value for homestead exempted properties was around 5.4%.

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
2020	57,000	61,120	\$2.53	\$9.49	\$41,436	\$89.93

*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





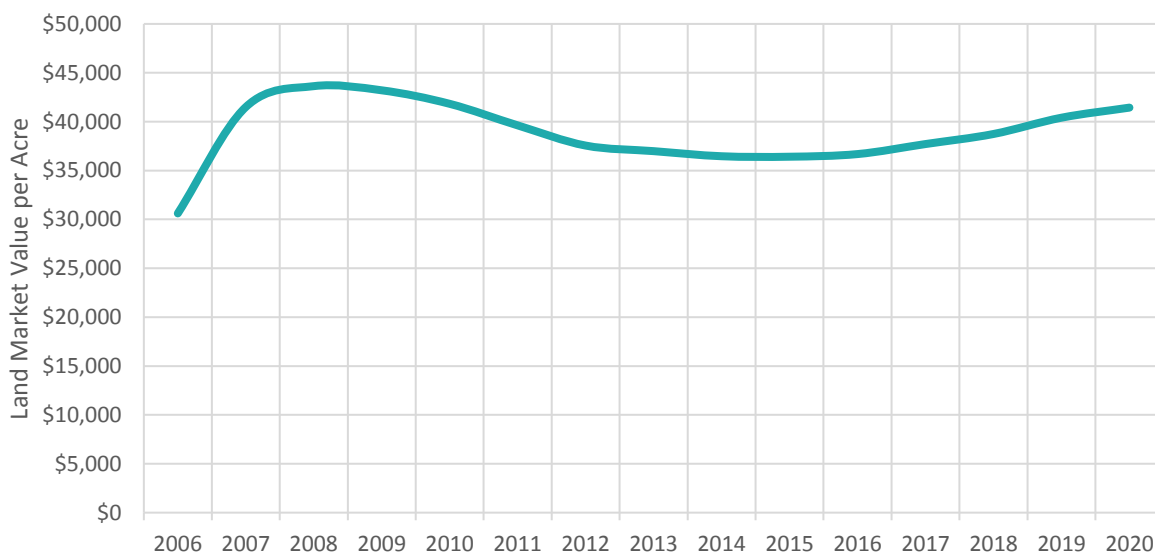
Economic Factors

Capital Accumulation

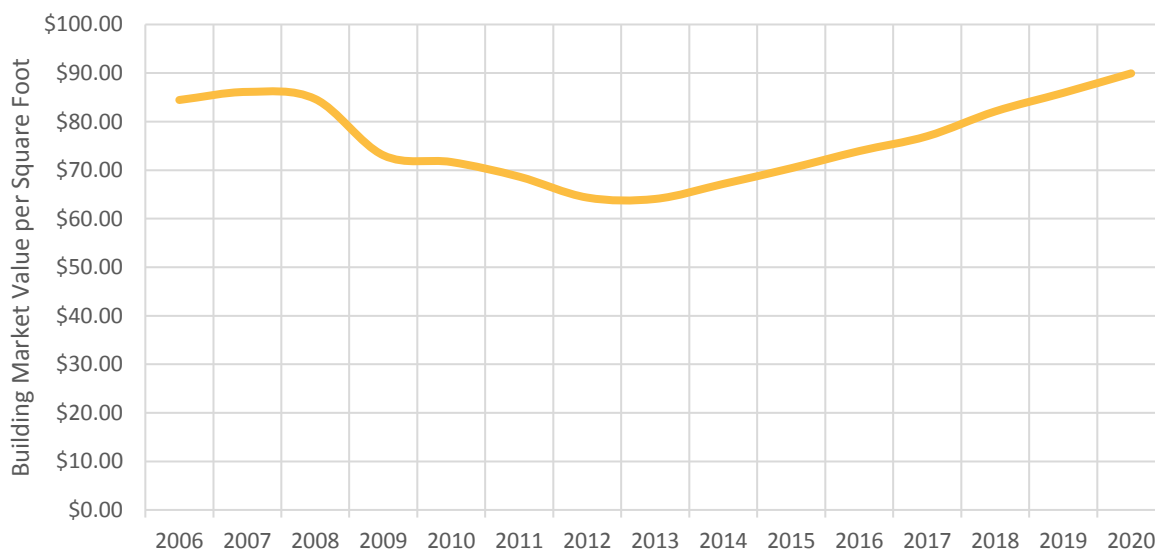
Homestead Exemption in Leon County

Trend: Residential property investment is a widespread method for local capital accumulation. Since 2016, acreage with homestead exemption has averaged 60,775 acres. Building value accounted for an average of 78% of total market value among homestead exempted properties since 2016. During 2016-2020, average annual growth in total market value for homestead exempted properties was around 5.4%.

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

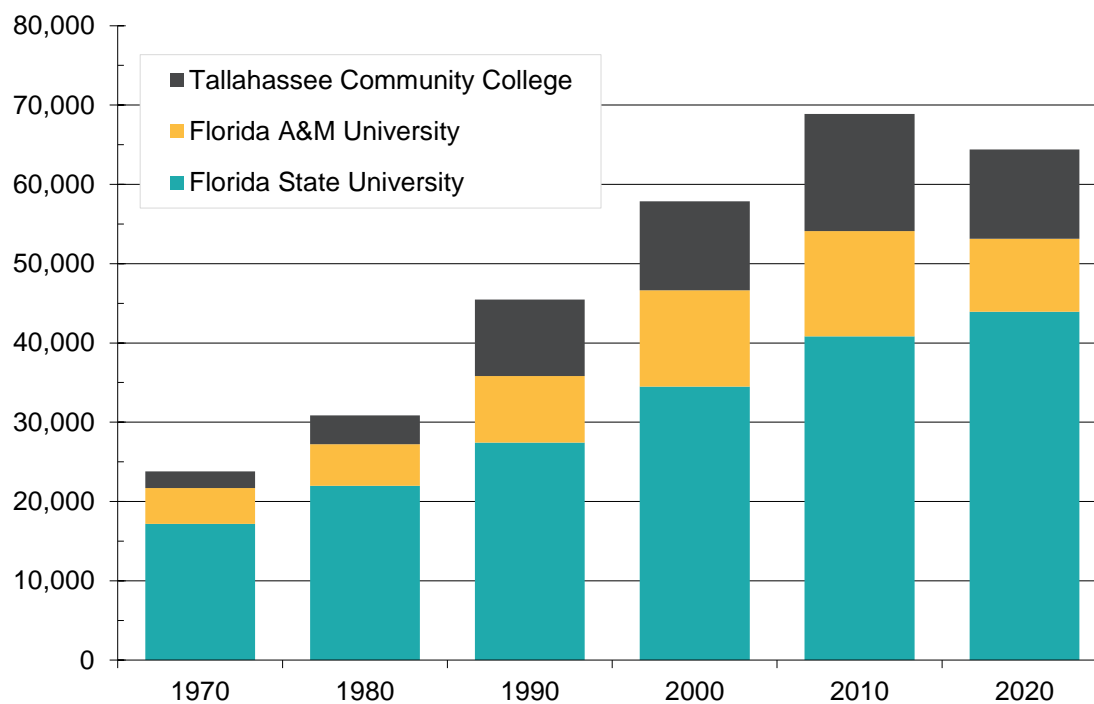
Trend: Combined enrollment for Florida State University, Florida A&M University, and Tallahassee Community College has stabilized at 64,000-65,000 since 2013.

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
2020	43,953	9,184	11,250	64,387

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

Trend: Combined enrollment for Florida State University, Florida A&M University, and Tallahassee Community College has stabilized at 64,000-65,000 since 2013.

**Fall Enrollment at Area Institutions of Higher Learning
(1970-2020)**

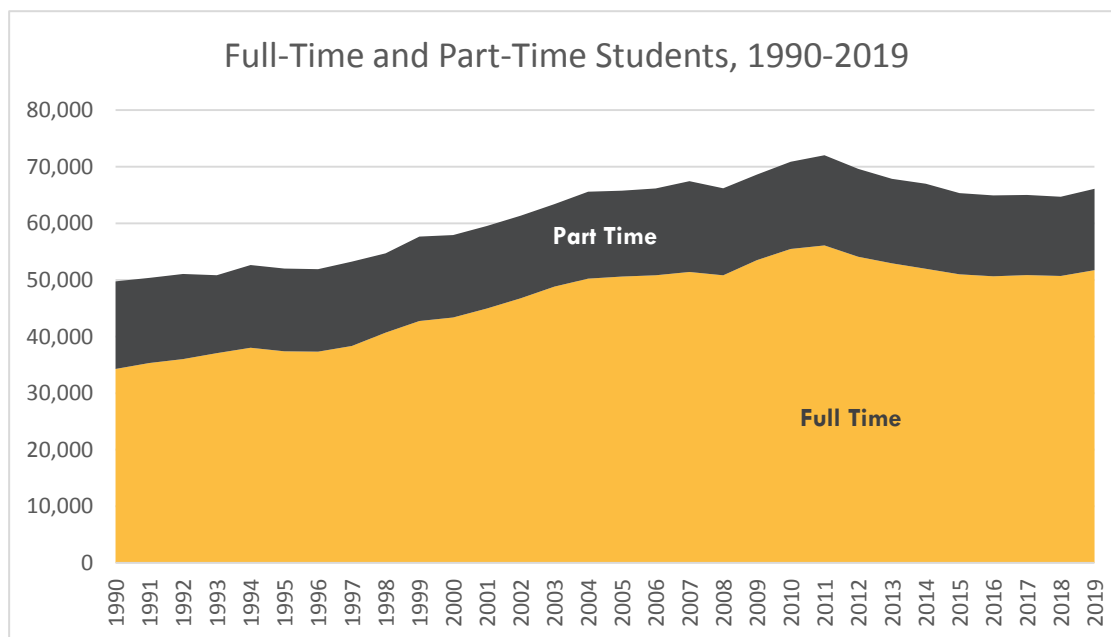
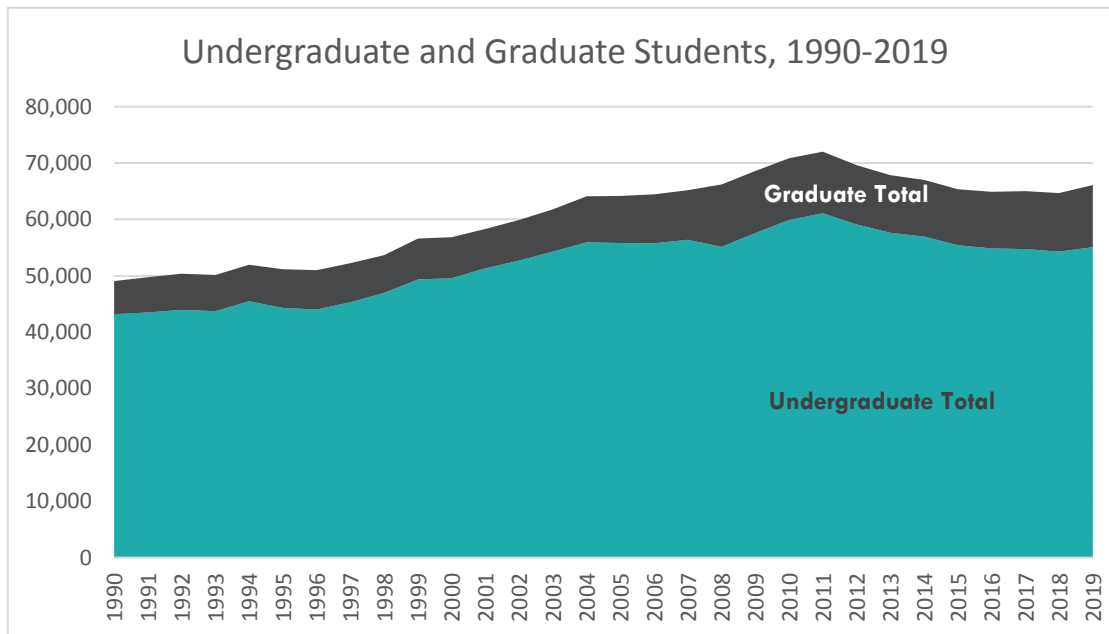


Trend: Between 1990 and 2019, the proportion of full-time students rose from 69% to 78% of the total. The proportion of graduate students rose from 12% to 17% of the total during those same years.

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	55,750	8,727	50,820	15,339
2007	56,413	8,786	51,405	16,040
2008	55,112	11,074	50,814	15,372
2009	57,602	11,012	53,497	15,117
2010	59,883	10,993	55,469	15,407
2011	61,113	10,910	56,093	15,930
2012	59,089	10,528	54,092	15,525
2013	57,663	10,194	52,930	14,927
2014	56,967	10,024	51,969	15,022
2015	55,410	9,924	50,989	14,345
2016	54,840	10,090	50,640	14,290
2017	54,765	10,243	50,855	14,153
2018	54,276	10,417	50,699	13,994
2019	55,108	10,988	51,725	14,371

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

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



**Higher Education Institutions:
Degrees Conferred**

Trend: Between 2010 and 2019, on average nearly 17,500 postsecondary degrees were conferred annually by higher education institutions (17,500 baccalaureate level and higher, 1,200 below baccalaureate level), including an average of more than 1,100 doctoral degrees per year.

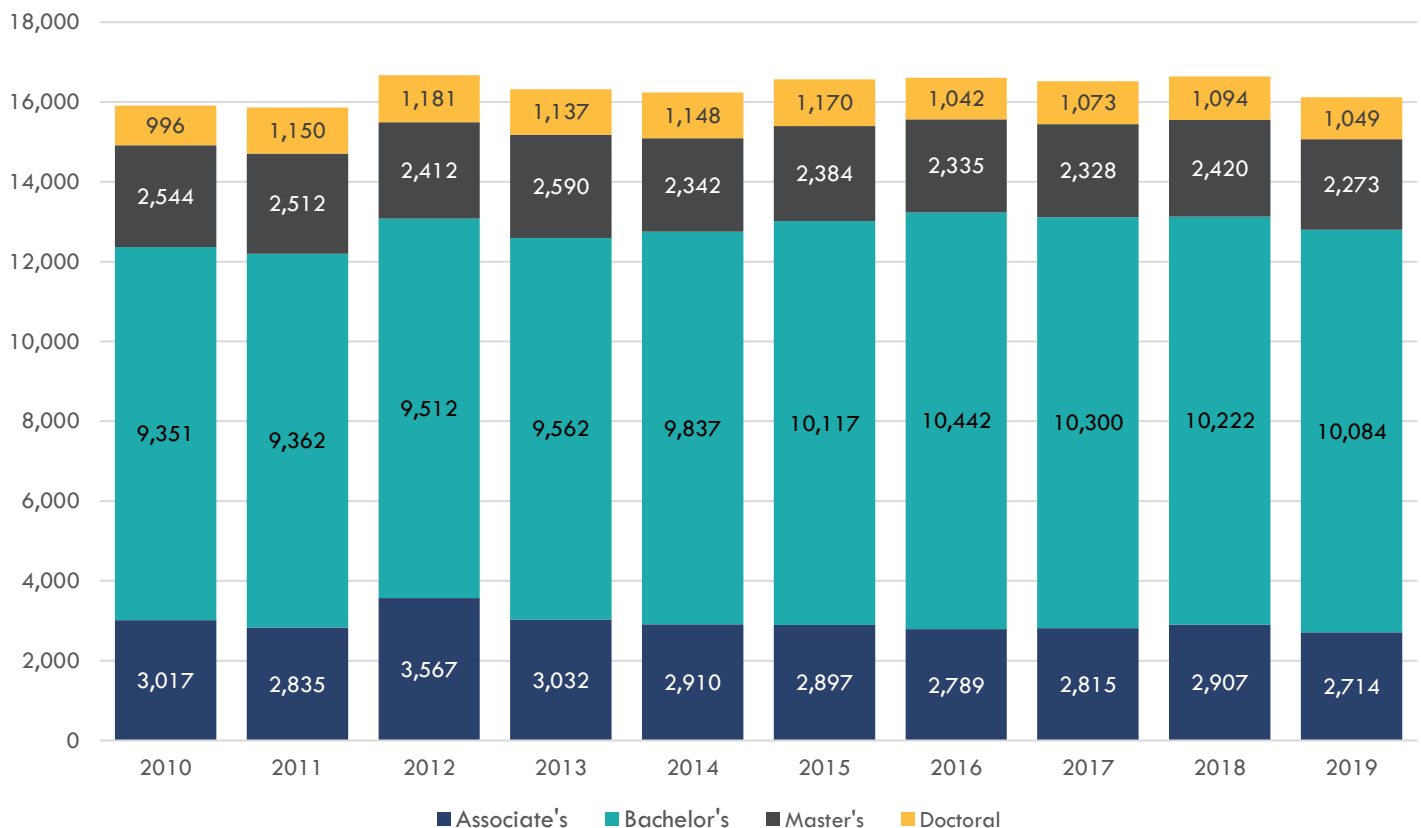
Baccalaureate Level and Above

School	Degree Type	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Flagler College-Tallahassee	Bachelor's	183	180	186	136	172	189	140	134	173	NA
	Associate's	47	67	59	102	113	67	54	48	40	43
Florida A&M University	Bachelor's	1,242	1,296	1,466	1,488	1,560	1,507	1,676	1,555	1,258	1,444
	Master's	341	294	270	274	277	231	271	252	303	311
	Doctoral*	313	332	331	401	335	353	326	327	340	319
Florida State University	Associate's	98	111	163	133	192	177	192	190	183	187
	Bachelor's	7,926	7,886	7,860	7,938	8,105	8,421	8,626	8,611	8,791	8,640
	Master's	2,203	2,218	2,142	2,316	2,065	2,153	2,064	2,076	2,117	1,962
Tallahassee Community College	Doctoral*	683	818	850	736	813	817	716	746	754	730
	Associate's	2,872	2,657	3,278	2,687	2,523	2,523	2,543	2,577	2,684	2,484
Year Total		15,908	15,859	16,672	16,321	16,237	16,568	16,608	16,516	16,643	16,120

* 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, 2010-2019



**Higher Education Institutions:
Degrees Conferred**

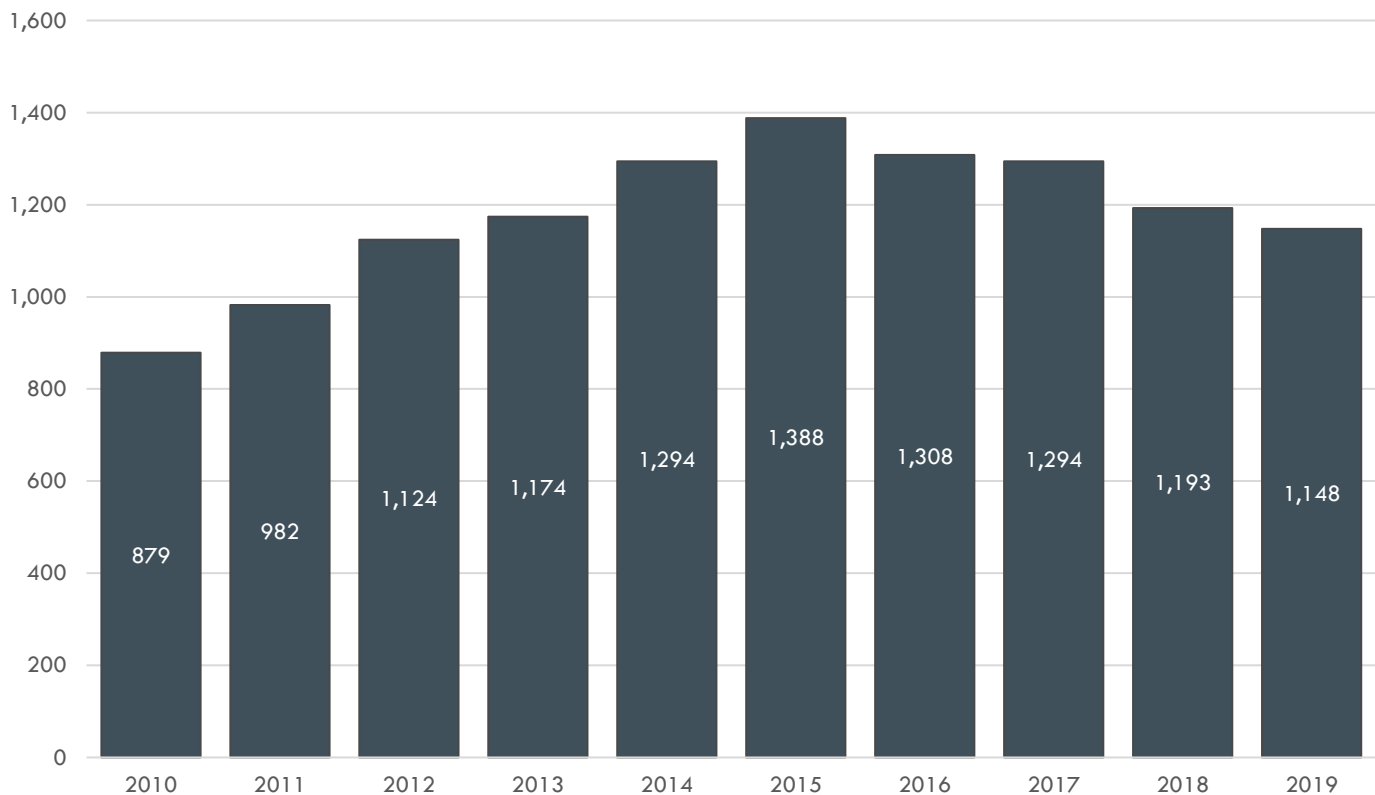
Trend: Between 2010 and 2019, on average nearly 17,500 postsecondary degrees were conferred annually by higher education institutions (17,500 baccalaureate level and higher, 1,200 below baccalaureate level), including an average of more than 1,100 doctoral degrees per year.

Below Baccalaureate Level

School	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Aveda Institute-Tallahassee	58	85	139	245	375	350	330	350	343	343
Lively Technical Center	324	379	408	340	294	313	318	277	247	229
North Florida Cosmetology Institute	87	96	94	110	113	106	92	91	95	89
Tallahassee Community College	410	422	483	479	512	619	568	576	508	487
Year Total	879	982	1,124	1,174	1,294	1,388	1,308	1,294	1,193	1,148

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

Total Degrees Awarded, Below Baccalaureate Level, 2010-2019





Education

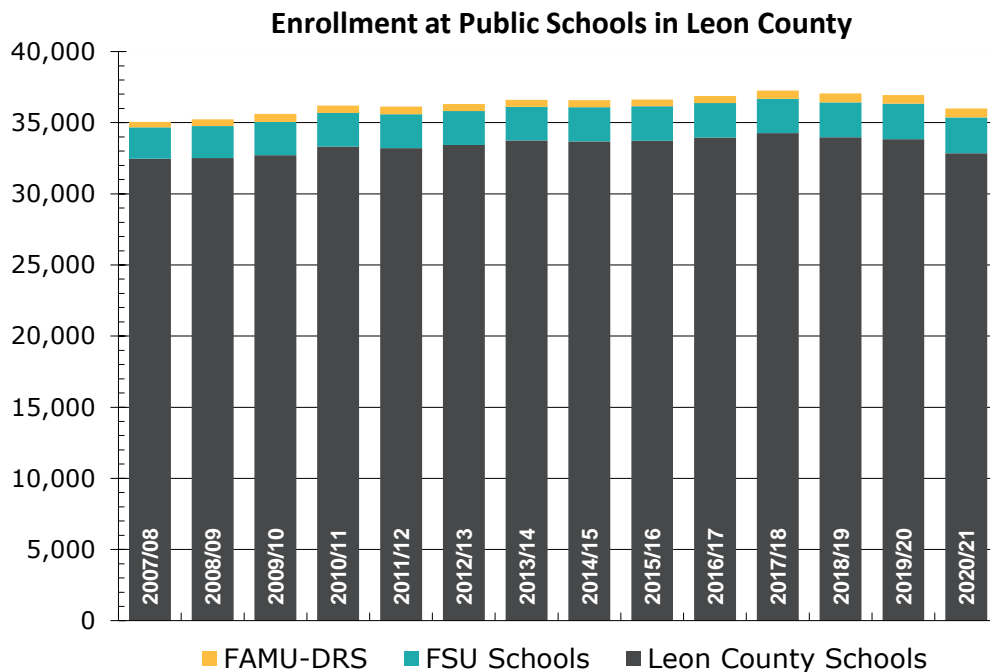
Public Schools: Enrollment

Trend: Public school enrollment has averaged around 36,600 over the past ten years, and had about the same enrollment in 2020/21 as in 2011/12.

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	2,494	33,847	36,941	-0.3%
2020/21	627	2,529	32,845	36,001	-2.6%

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

Source: Florida Department of Education



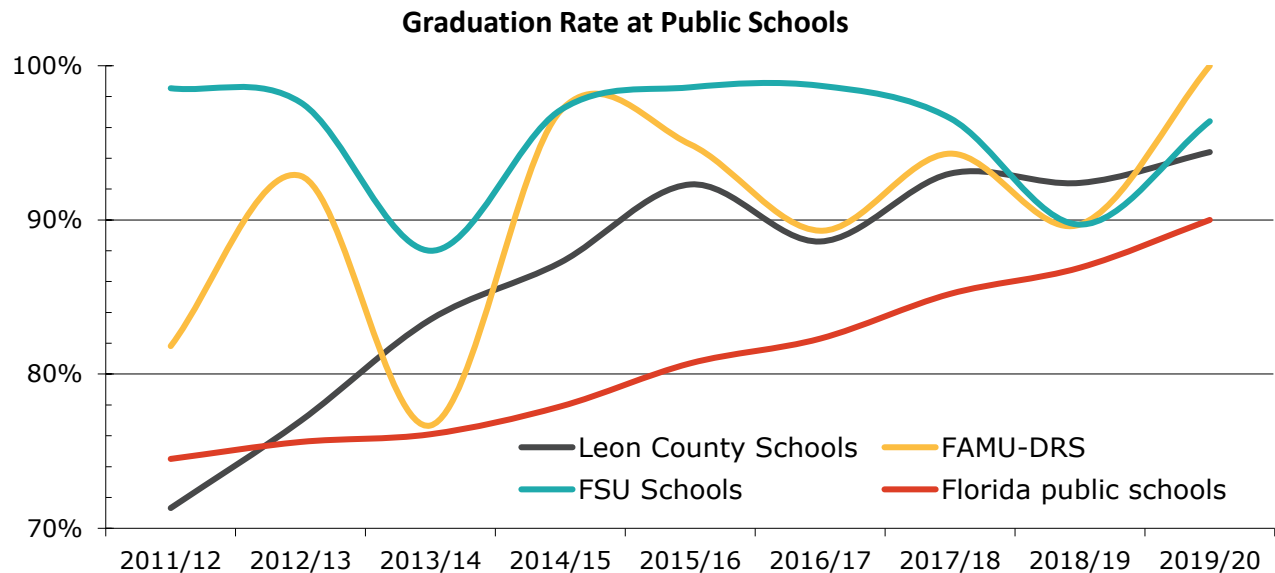
Education
Public Schools:
Graduation Rate

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

Year	Leon County Schools		FAMU-DRS		FSU Schools		Florida public schools	
	Graduates	Percent Graduates	Graduates	Percent Graduates	Graduates	Percent Graduates	Graduates	Percent Graduates
2011/12	1,703	71.3%	27	81.8%	135	98.5%	141,954	74.5%
2012/13	1,577	77.0%	39	92.9%	164	97.6%	149,430	75.6%
2013/14	1,690	83.5%	23	76.7%	132	88.0%	149,397	76.1%
2014/15	1,791	87.2%	33	97.1%	135	97.1%	155,714	77.9%
2015/16	1,862	92.3%	37	94.9%	136	98.6%	159,672	80.7%
2016/17	1,978	88.6%	25	89.3%	149	98.7%	168,042	82.3%
2017/18	2,102	93.0%	33	94.3%	144	96.6%	180,411	85.2%
2018/19	2,139	92.4%	35	89.7%	142	89.7%	184,509	86.9%
2019/20	2,161	94.4%	31	100.0%	163	96.4%	188,088	90.0%

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 2011-2019, an average of nearly 6,700 students each year 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

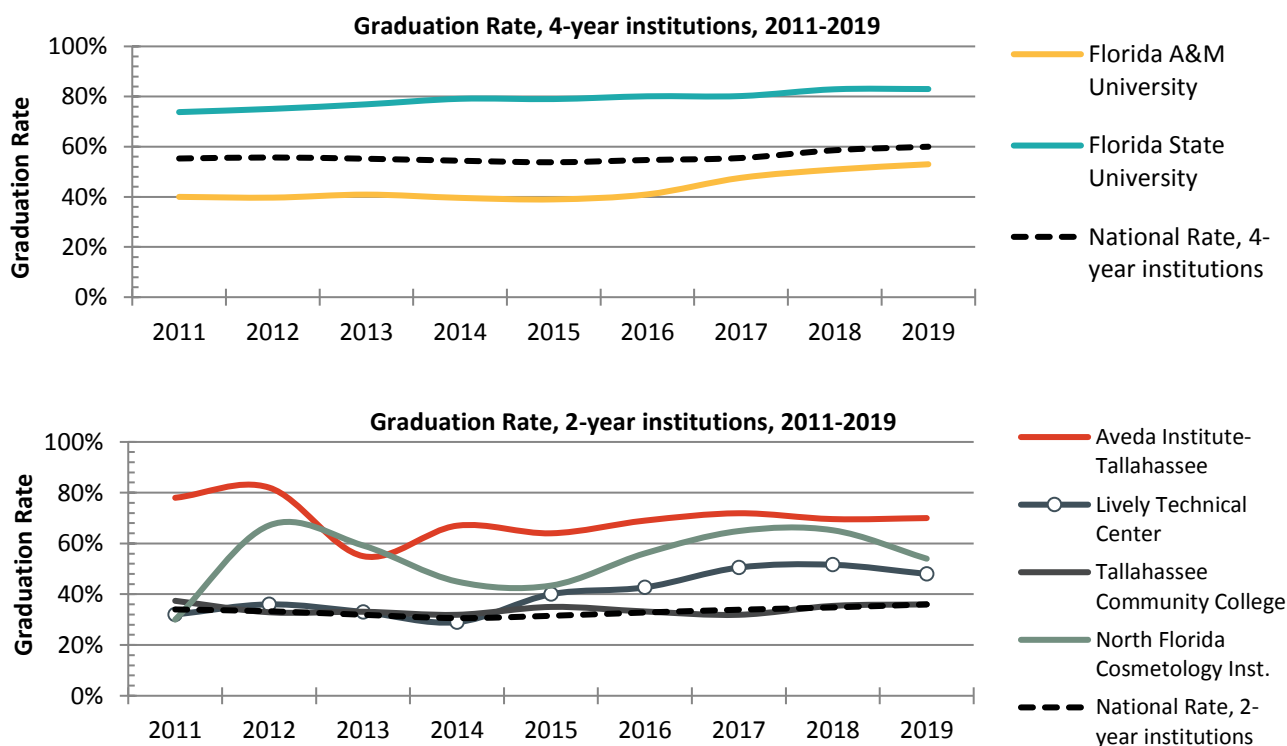
School	2011	2012	2013	2014	2015	2016	2017	2018	2019
Aveda Institute-Tallahassee	35	69	93	46	67	100	82	94	94
Florida A&M University	655	641	759	827	913	1,108	945	762	642
Florida State University	4,469	4,651	4,697	3,951	4,704	4,769	4,927	4,763	5061
Lively Technical Center	253	368	288	233	250	256	267	275	313
North Florida Cosmetology Inst.	18	55	61	49	49	60	63	58	57
Tallahassee Community College	882	827	838	801	733	838	801	733	766
Year Total	6,312	6,611	6,736	5,907	6,716	7,131	7,085	6,685	6,933

Graduation Rate*

School	2011	2012	2013	2014	2015	2016	2017	2018	2019
Aveda Institute-Tallahassee	78%	82%	55%	67%	64%	69%	72%	70%	70%
Florida A&M University	40%	40%	41%	40%	39%	41%	48%	51%	53%
Florida State University	74%	75%	77%	79%	79%	80%	80%	83%	83%
Lively Technical Center	32%	36%	33%	29%	40%	43%	51%	52%	48%
North Florida Cosmetology Inst.	30%	67%	59%	45%	43%	56%	65%	65%	54%
Tallahassee Community College	37%	33%	33%	32%	35%	33%	32%	35%	36%
National Rate, 4-year institutions	55%	56%	55%	54%	54%	55%	56%	59%	60%
National Rate, 2-year institutions	34%	33%	32%	31%	32%	33%	34%	35%	36%

* 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*

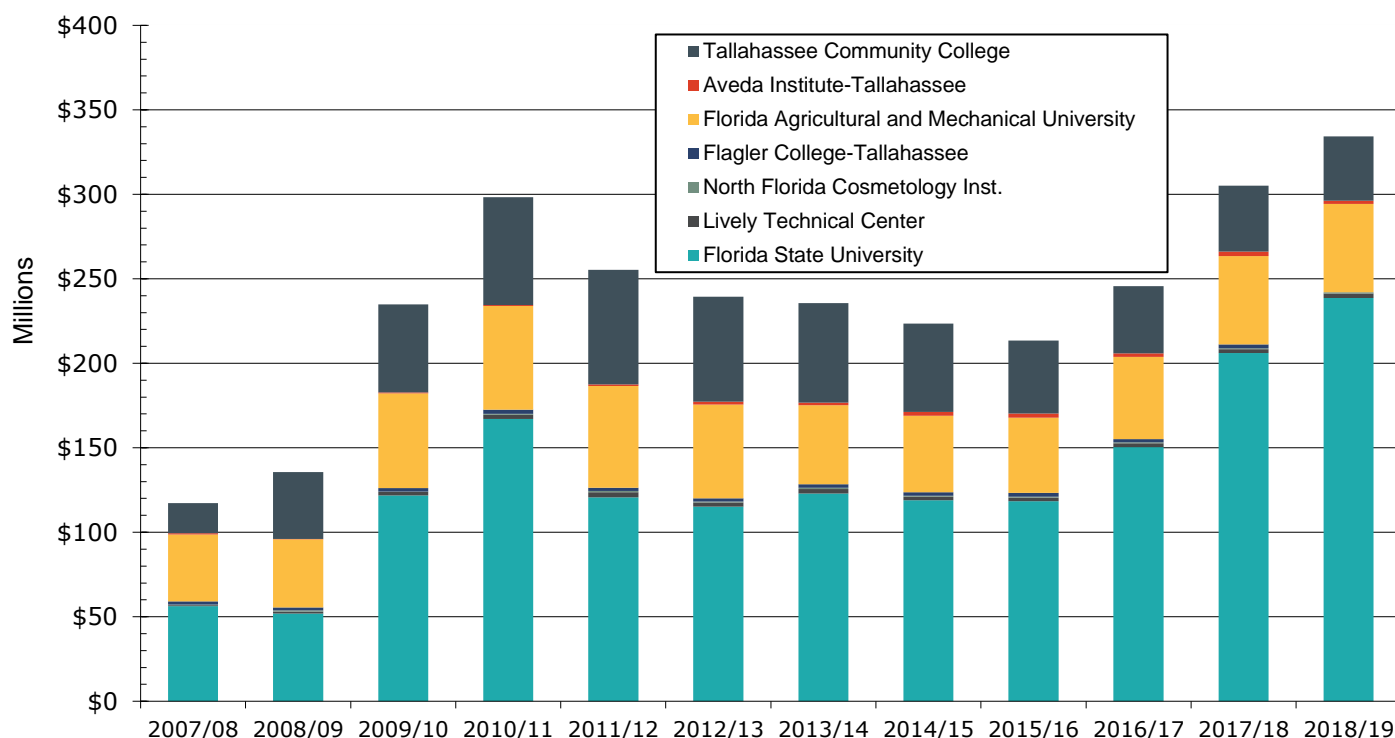
Trend: During 2014/15 to 2018/19, financial aid received by undergraduate students from all sources averaged \$264.4 million per year. FSU accounted for approximately 63%; FAMU, 18%; TCC, 16%; and other institutions, ~3%.

Year	Aveda Institute-Tallahassee	Flagler College-Tallahassee	Florida Agricultural and Mechanical University	Florida State University	Lively Technical Center	North Florida Cosmetology Inst.	Tallahassee Community College	Undergrad. Financial Aid
2007/08	\$786,576	\$1,923,824	\$39,563,479	\$56,345,939	\$564,206	\$304,552	\$17,761,543	\$117,250,119
2008/09	\$234,404	\$1,722,429	\$40,255,788	\$51,822,807	\$1,142,554	\$835,683	\$39,544,213	\$135,557,878
2009/10	\$512,912	\$2,083,545	\$56,106,756	\$121,786,193	\$2,177,128	\$123,970	\$51,977,206	\$234,767,710
2010/11	\$583,863	\$2,445,680	\$61,302,528	\$167,123,605	\$2,361,961	\$684,974	\$63,807,067	\$298,309,678
2011/12	\$945,208	\$1,927,117	\$60,314,634	\$120,579,251	\$3,025,807	\$806,626	\$67,806,333	\$255,404,976
2012/13	\$1,626,372	\$1,825,064	\$55,546,343	\$115,087,913	\$2,498,158	\$685,354	\$62,066,585	\$239,335,789
2013/14	\$1,657,550	\$2,058,865	\$46,713,045	\$122,996,264	\$2,623,416	\$731,439	\$58,782,304	\$235,562,883
2014/15	\$2,365,607	\$2,168,252	\$45,145,262	\$119,003,105	\$2,001,611	\$562,096	\$52,336,809	\$223,582,742
2015/16	\$2,379,553	\$2,096,701	\$44,630,406	\$118,354,885	\$2,124,311	\$651,591	\$43,240,308	\$213,477,755
2016/17	\$1,998,147	\$1,921,383	\$48,639,363	\$150,310,663	\$2,302,467	\$688,002	\$39,819,172	\$245,679,197
2017/18	\$2,566,872	\$2,201,949	\$52,294,948	\$205,985,895	\$2,399,137	\$585,778	\$39,119,719	\$305,154,298
2018/19	\$2,036,617	—	\$52,246,277	\$238,718,462	\$2,605,054	\$664,300	\$38,055,270	\$334,325,980

*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



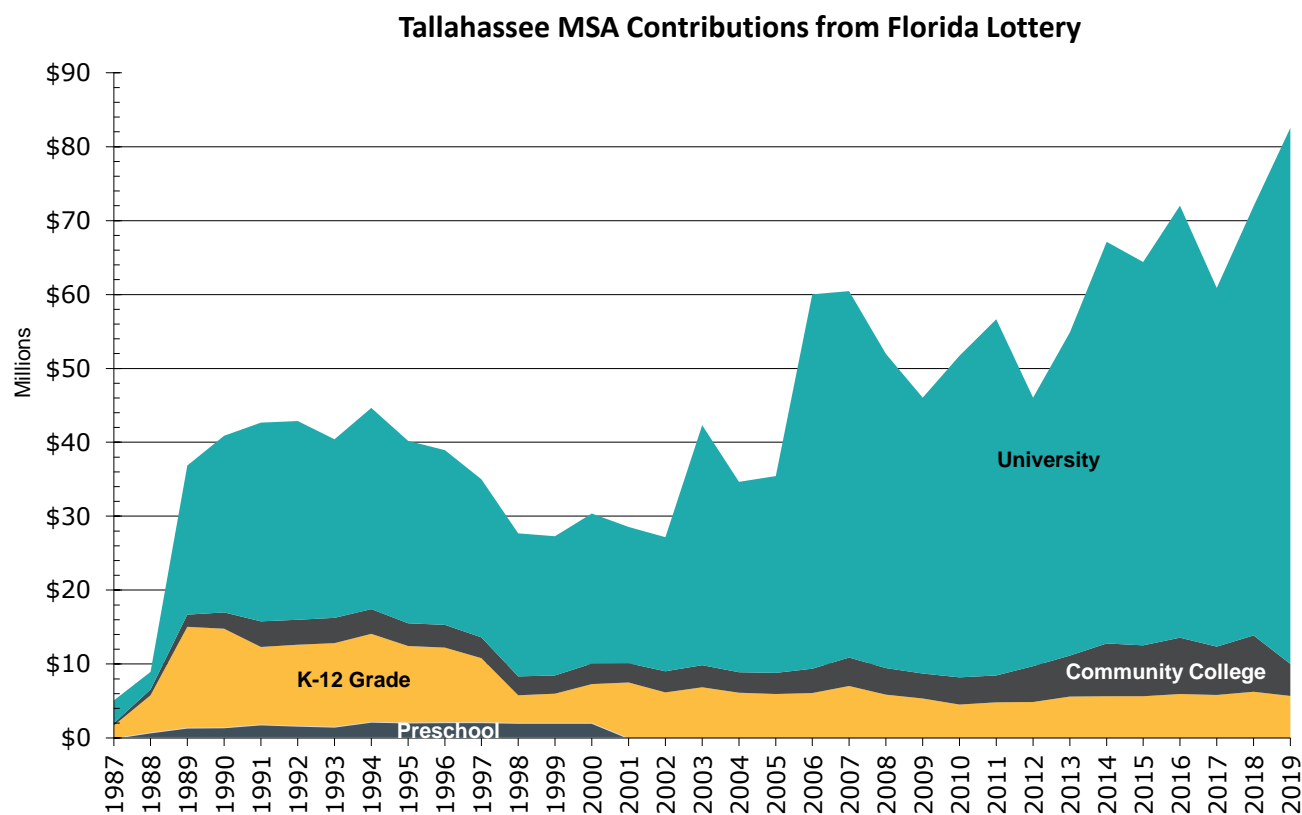
Trend: Since 1987, over \$1.26 billion has gone towards educational institutions in the Tallahassee MSA from the Florida Lottery, with universities accounting for almost 73% and K-12 Grades accounting for around 17%. Leon County accounted for almost 95% of contributions to the Tallahassee MSA. Funding 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
2017	\$610,771	\$84,120	\$59,795,143	\$386,796	\$0	\$5,826,860	\$6,512,031	\$48,537,939
2018	\$498,821	\$45,051	\$70,883,861	\$479,756	\$0	\$6,262,501	\$7,596,608	\$58,048,380
2019	\$574,572	\$100,879	\$81,217,927	\$642,112	\$0	\$5,679,874	\$4,320,585	\$72,535,031

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

Source: 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.





Community and Environment

Electric Service Points

Trend: Residential Electric Service Points have increased 1.4% per year on average between 2016 and 2020, while Non-Demand Commercial Service Points increased by an average of 0.9% per year during that time.

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
2020	105,829	12,382

Source: City of Tallahassee, Electric Utilities



Community and Environment

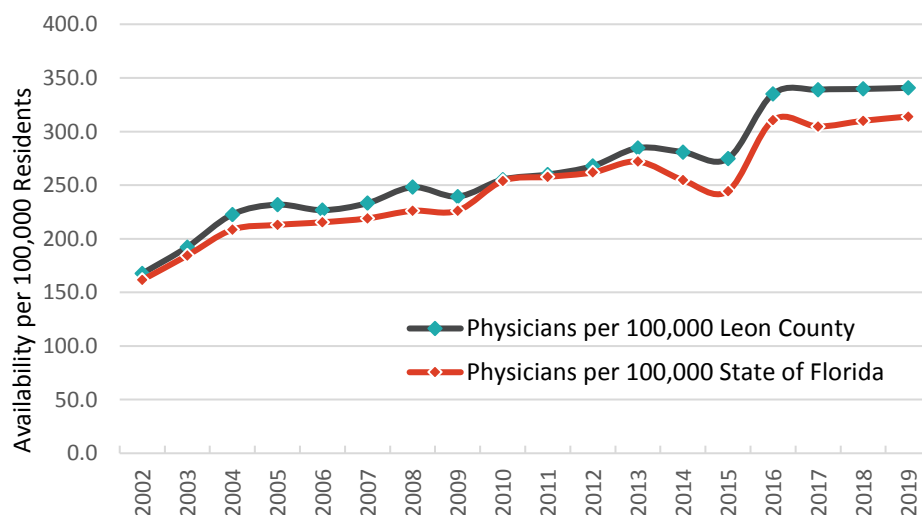
Health Resource Availability

Trend: During 2014-2019, 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	167.6	161.6	423.7	335.4
2003	192.3	184.4	413.2	331.3
2004	222.7	208.5	403.9	326.0
2005	231.8	212.9	403.1	322.9
2006	226.7	215.4	398.1	319.1
2007	233.2	219.0	404.4	318.0
2008	248.1	226.1	401.0	319.9
2009	239.4	226.2	399.6	321.0
2010	255.2	253.9	405.8	320.1
2011	259.9	257.7	405.2	319.1
2012	267.8	261.9	419.3	319.8
2013	284.6	272.0	417.7	320.4
2014	280.8	254.7	413.0	316.8
2015	274.9	244.5	416.9	313.9
2016	335.1	310.5	412.1	312.4
2017	339.0	304.7	413.9	312.3
2018	339.7	310.0	416.2	308.2
2019	340.7	314.0	407.1	311.2

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

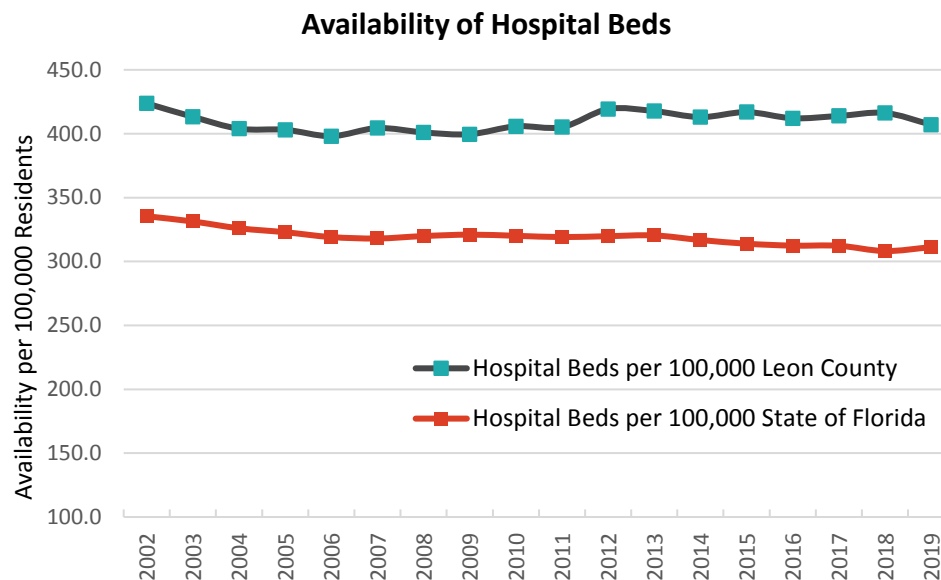




Community and Environment

Health Resource Availability

Trend: During 2014-2019, 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.



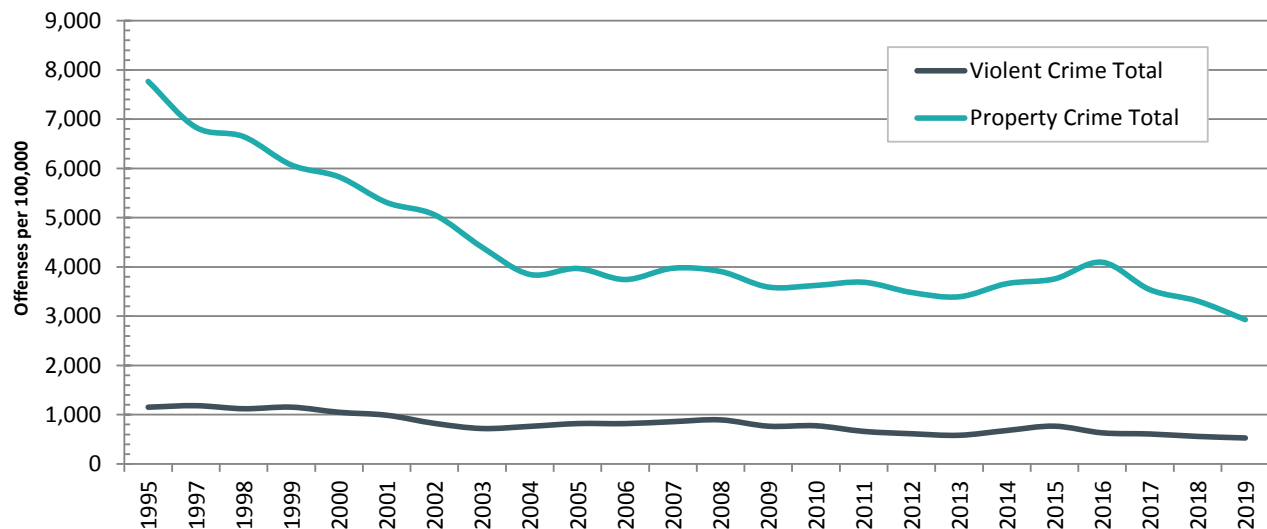
Trend: On a per capita basis, the overall frequency of property and violent crimes in the Tallahassee MSA in the 2010s has been lower than during the 1990s.

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
2019	6.5	71.0	81.2	368.9	527.5	560.3	2,124.4	245.8	2,930.5

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.

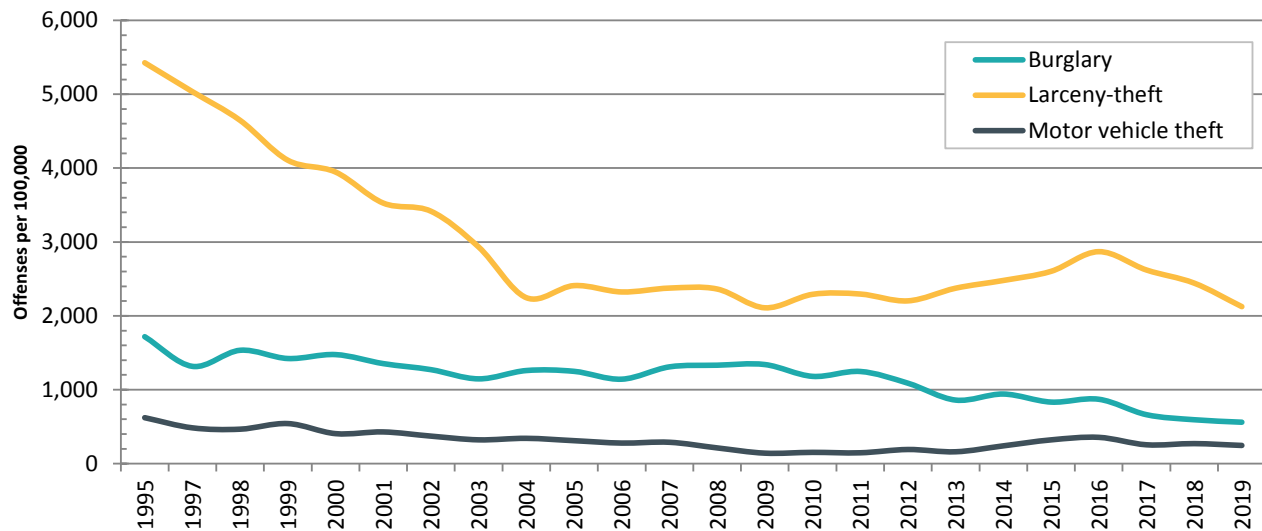
Source: FBI UCR

Index of Property and Violent Crimes in Tallahassee MSA

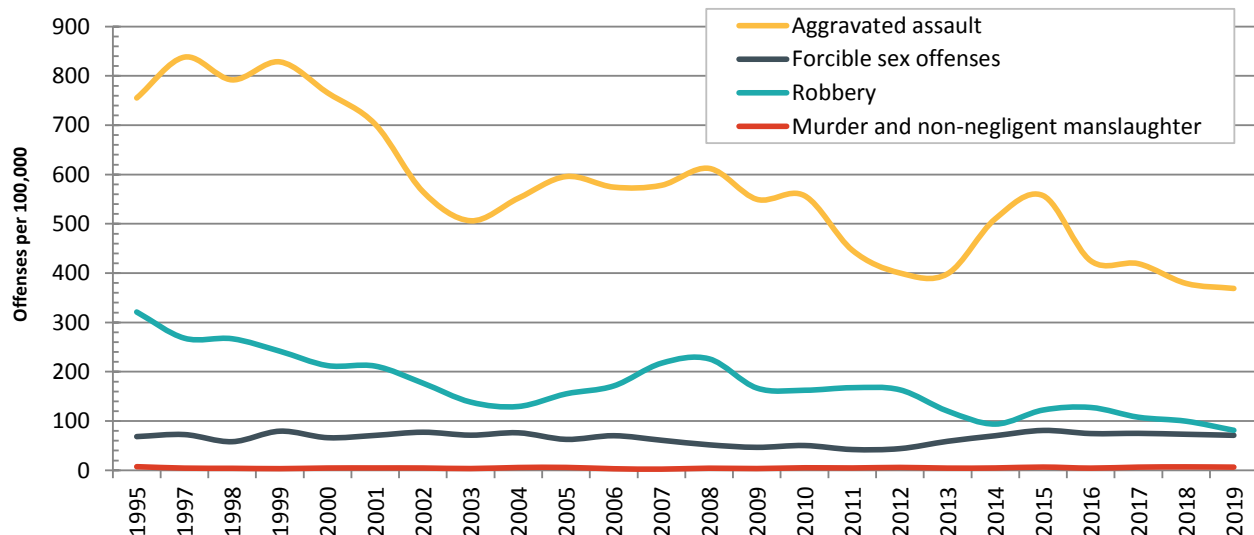


Trend: On a per capita basis, the overall frequency of property and violent crimes in the Tallahassee MSA in the 2010s has been lower than during the 1990s.

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 crime in Leon County in 2020 was lower than any year in the past three decades, and violent crime frequency, although up from 2019, was lower than any other year during 1991-2018.

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
2020	2,456.9	1,768.2	602.7	384.1

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



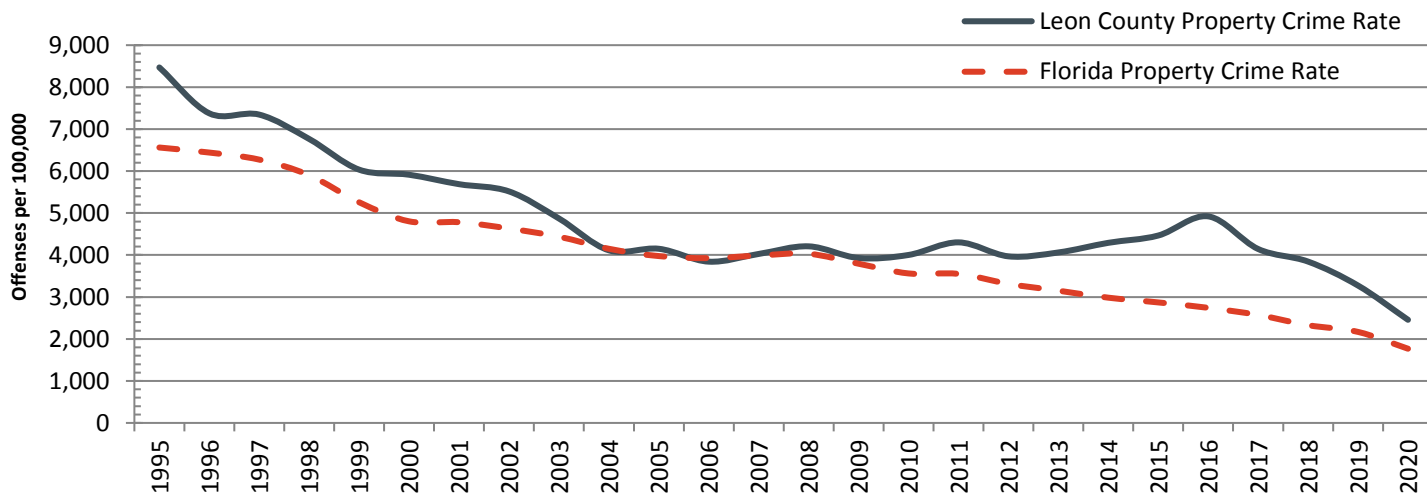
Community and Environment

Public Safety:

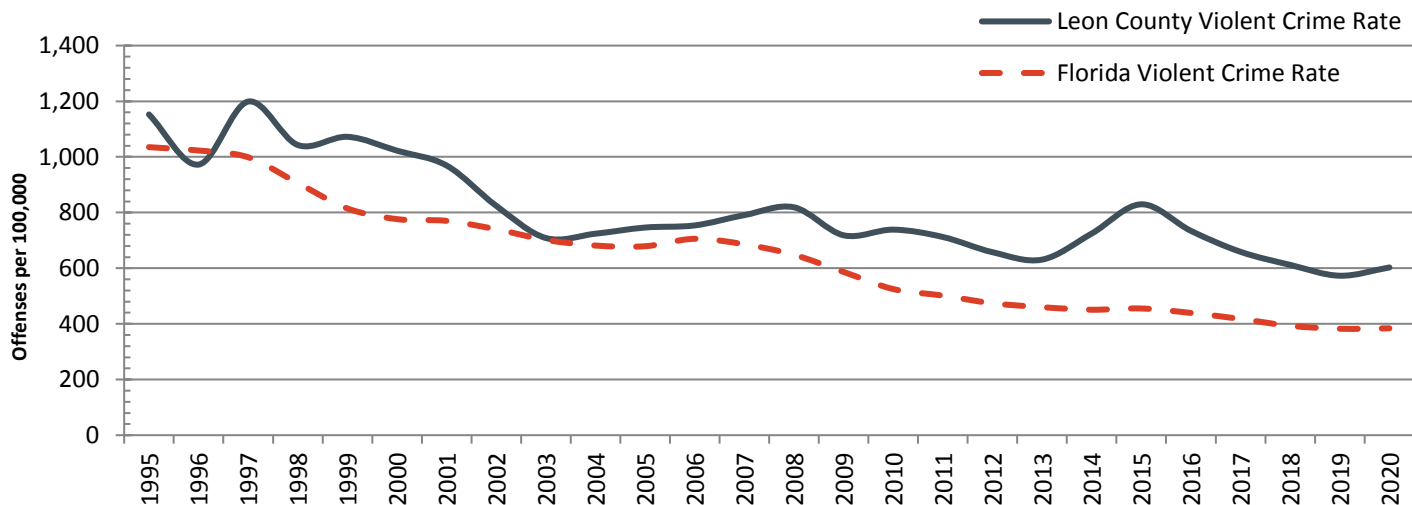
Leon County Crime Rate

Trend: On a per capita basis, the overall frequency of property crime in Leon County in 2020 was lower than any year in the past three decades, and violent crime frequency, although up from 2019, was lower than any other year during 1991-2018.

Property Crime Rate



Violent Crime Rate

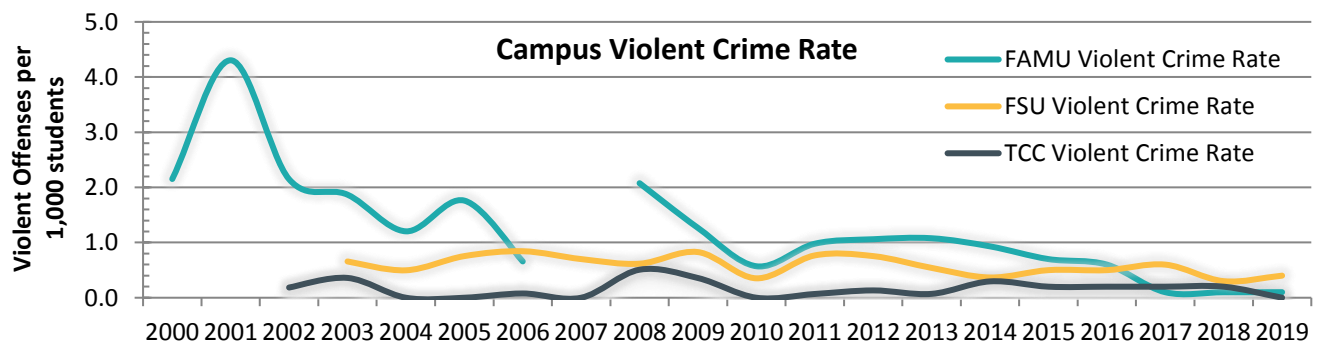
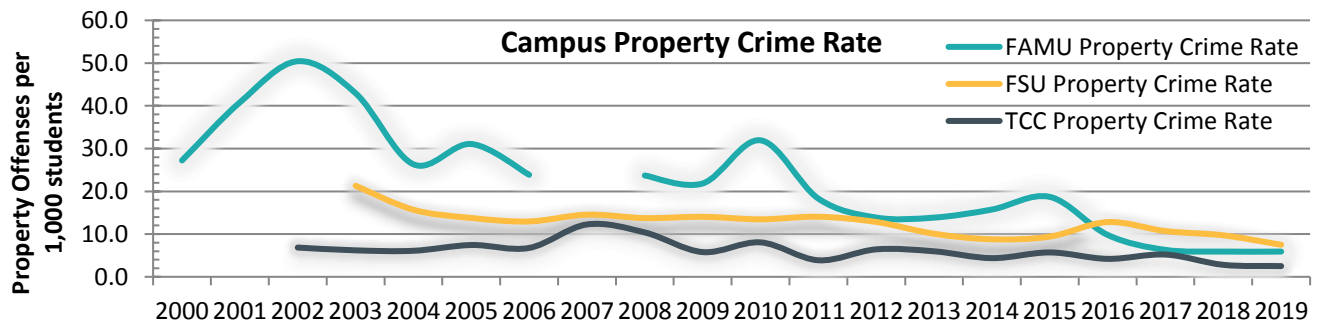


Trend: On a per student basis, the frequency of both violent and property crimes on the campuses of FAMU, FSU, and TCC have been lower in the 2010s than they were in the 2000s.

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
2017	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
2019	5.9	7.5	2.5	0.1	0.4	0.0

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

2020 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	3.71500
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	0.03110
Inside City Limits Total		18.90850
Outside City Limits Total		14.80850
Downtown Improvement Area		19.90850

Source: Leon County Property Appraiser

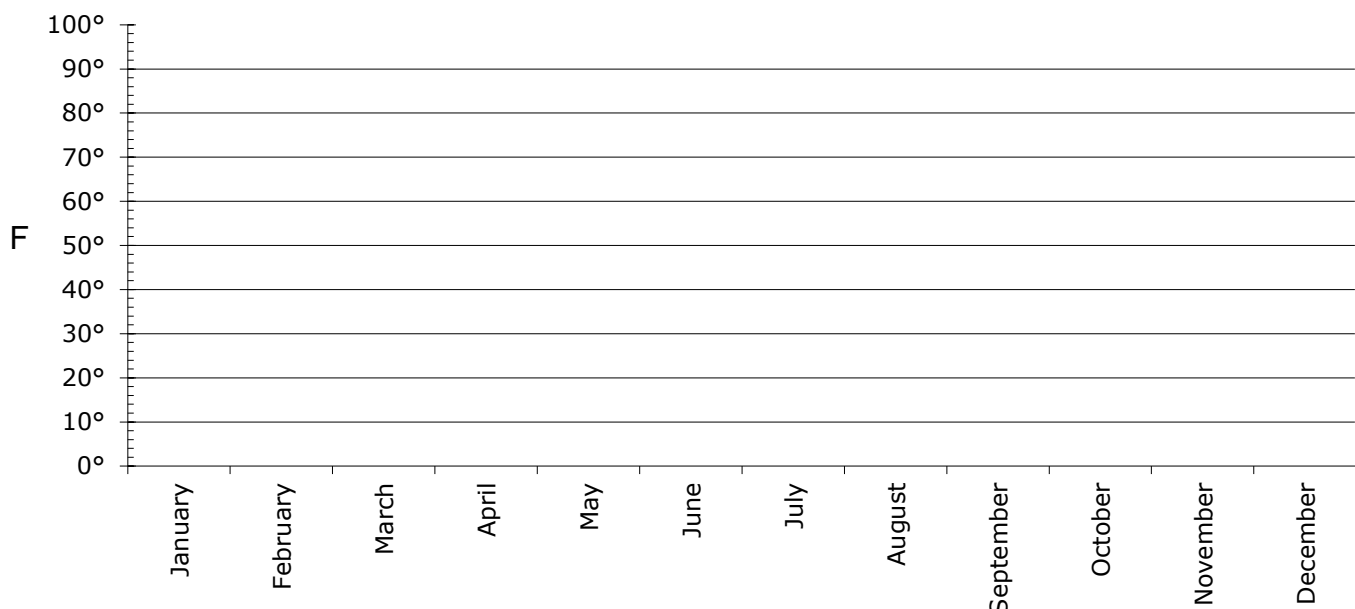
Trend: Tallahassee has a mild, moist climate characteristic of the Gulf States, experiencing a subtropical summer similar to the rest of Florida. In contrast to the Florida peninsula, Northwest Florida of which Tallahassee is a part, experiences four seasons. Prevailing winds average 5.5 miles per hour 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
Annual	79.6	55.8	92	29	114	59.2

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

Source: National Climatic Data Center, Comparative Climatic Data

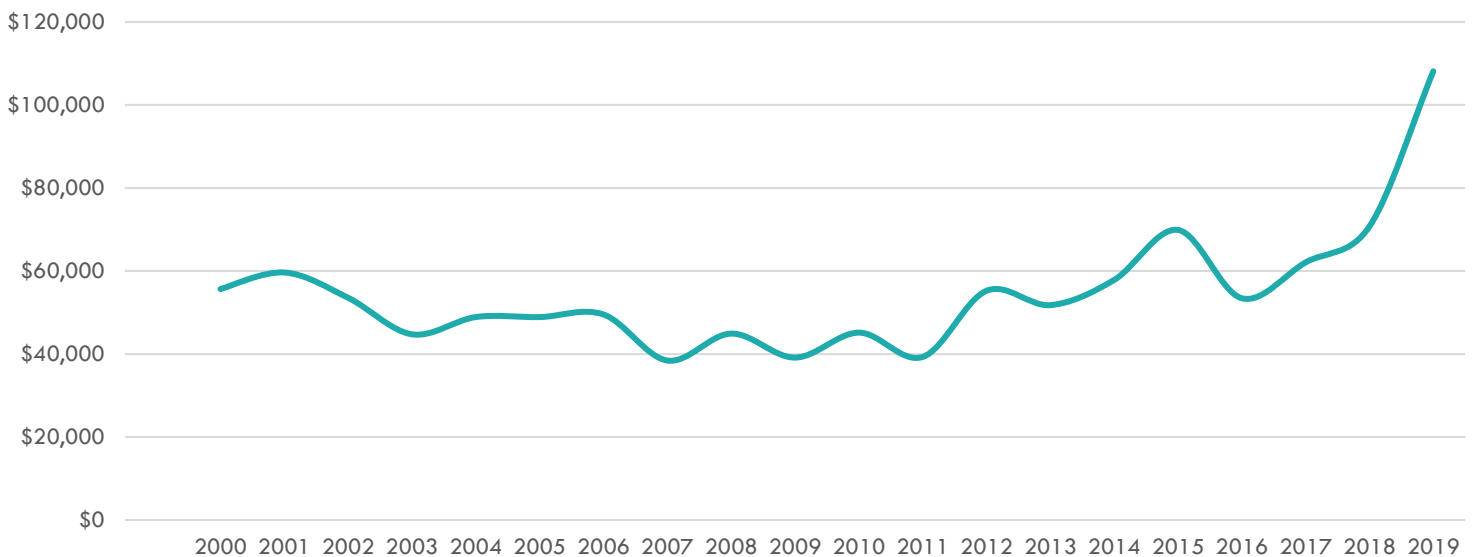
Tallahassee Average Daily Low and High Temperatures



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 2019, farm earnings totaled \$108.1 million

Year	Cash Receipts from Farm Marketings (\$1,000s)		Farm Earnings (\$1,000s)
	Crops	Livestock	
2000	\$20,508	\$108,462	\$55,660
2001	\$21,453	\$110,569	\$59,649
2002	\$18,009	\$113,606	\$53,547
2003	\$16,443	\$108,476	\$44,749
2004	\$19,790	\$104,000	\$48,912
2005	\$19,436	\$114,113	\$48,899
2006	\$16,817	\$101,723	\$49,531
2007	\$14,848	\$114,913	\$38,429
2008	\$17,129	\$107,591	\$44,925
2009	\$16,392	\$102,114	\$39,139
2010	\$22,149	\$101,867	\$45,160
2011	\$27,509	\$95,810	\$39,293
2012	\$33,498	\$97,253	\$55,246
2013	\$40,016	\$85,726	\$51,780
2014	\$55,354	\$82,983	\$57,853
2015	\$55,007	\$87,756	\$69,897
2016	\$44,021	\$87,753	\$53,437
2017	\$51,013	\$91,240	\$62,083
2018	\$49,029	\$89,295	\$70,760
2019	\$46,147	\$92,991	\$108,132

Farm Earnings (\$1,000s)

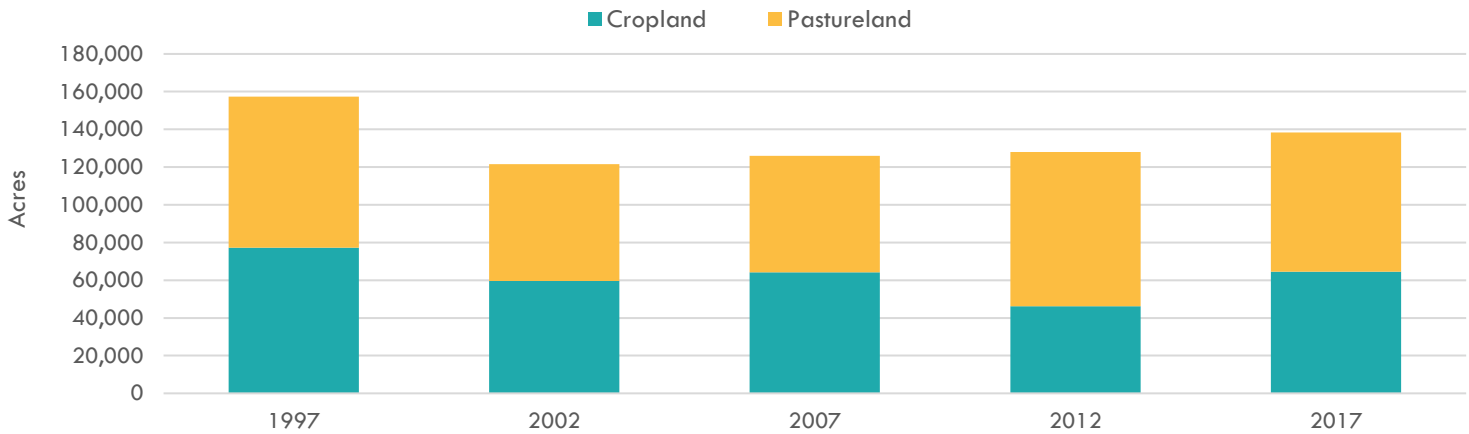


Trend: Gadsden and Jefferson counties account for most commercial agricultural activity in the Tallahassee MSA, with cotton, peanuts, and cattle as principal commodities. As of 2019, farm earnings totaled \$108.1 million

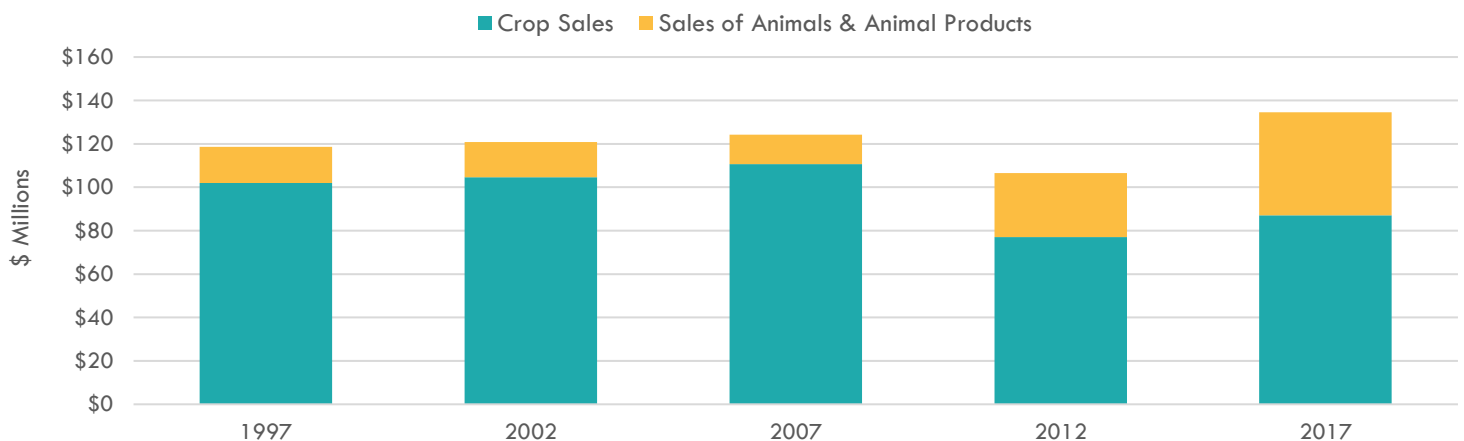
Year	Farmland Acreage in Tallahassee MSA		Agricultural Sales (\$1,000s)	
	Cropland	Pastureland	Crop Sales	Sales of Animals & Animal Products
1997	77,305	80,065	\$101,932	\$16,642
2002	59,617	61,881	\$104,659	\$16,115
2007	64,109	61,786	\$110,671	\$13,531
2012	46,237	81,696	\$77,070	\$29,494
2017	64,542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

Source: USDA, Census of Agriculture

Farmland Acreage in Tallahassee MSA



Agricultural Sales in Tallahassee MSA

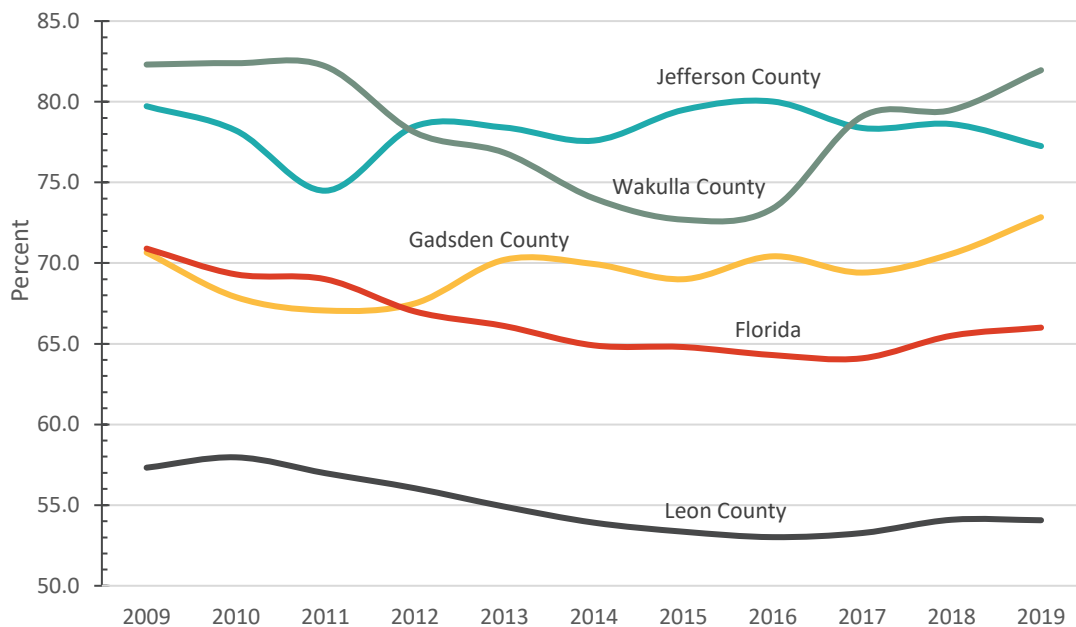


Trend: Homeownership rates in the Tallahassee MSA are highest in Jefferson and Wakulla counties. Due in part to its student population, Leon County's homeownership rate is the lowest in the Tallahassee MSA and lower than the State rate.

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	79.1	64.1
2018	54.1	78.6	70.6	79.5	65.5
2019	54.1	77.3	72.8	82.0	66.0

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

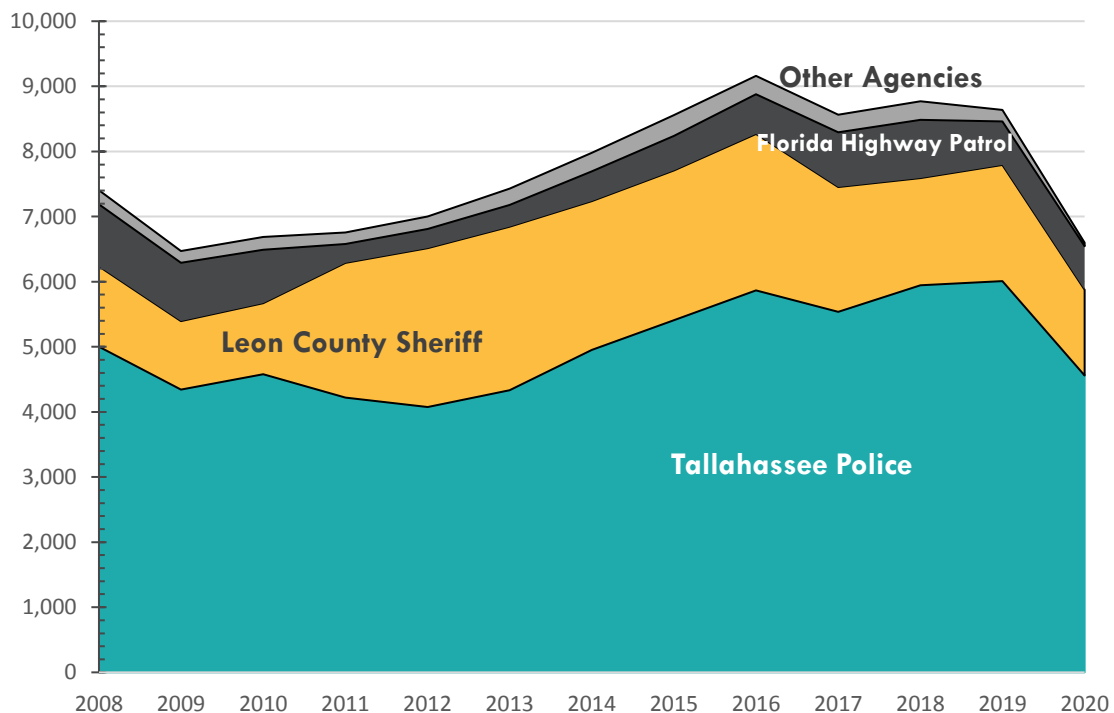
Trend: Between 2016 and 2020, there were on average about 8,300 motor vehicle crashes in Leon County each year (or about 23 per day), with an annual average of 33 traffic fatalities.

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
2020	4,561	1,314	668	57	6,600	28

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, TCC Police, and Capitol Police.

Source: Signal Four Analytics, University of Florida GeoPlan Center

Motor Vehicle Crashes in Leon County



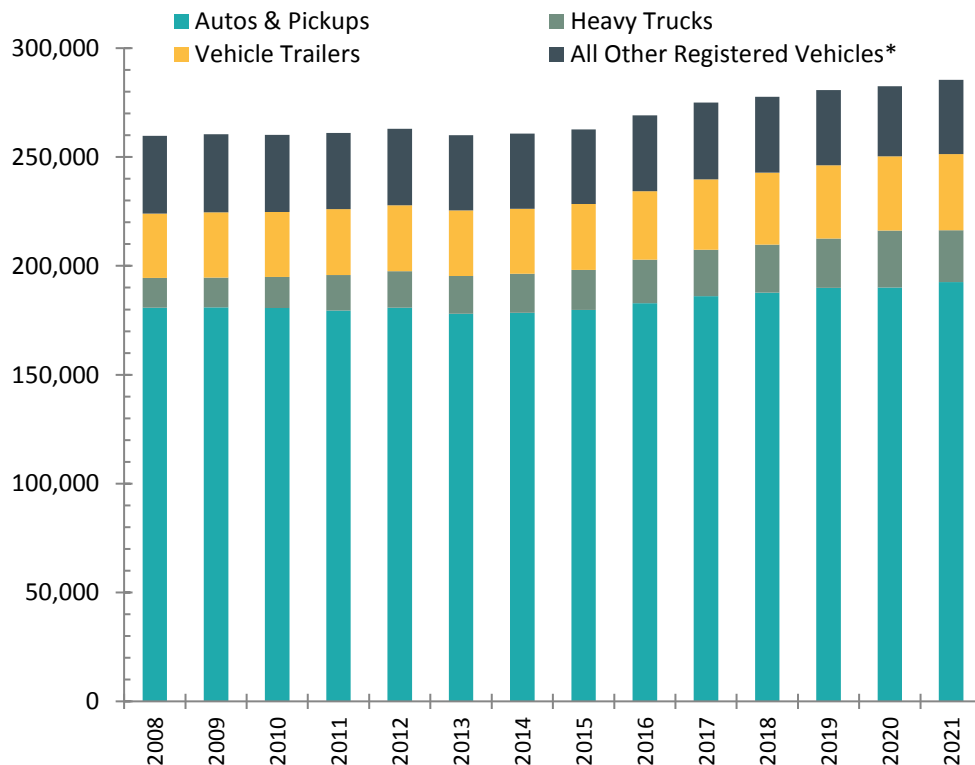
Trend: Total registered vehicles increased 9.3% from 2011 to 2021, by an annual average of 1.2% per year. Autos and pickups account for 68% of total registrations.

Year	Autos & Pickups	Heavy Trucks	Vehicle Trailers	All Other Registered Vehicles*	Total Registered Vehicles
2008	180,789	13,738	29,462	35,706	259,695
2009	180,948	13,688	29,908	35,873	260,417
2010	180,729	14,244	29,805	35,389	260,167
2011	179,549	16,233	30,284	34,961	261,027
2012	180,800	16,759	30,273	35,185	263,017
2013	178,047	17,299	30,110	34,555	260,011
2014	178,397	18,002	29,875	34,459	260,733
2015	179,723	18,362	30,374	34,191	262,650
2016	182,863	20,019	31,476	34,784	269,142
2017	186,122	21,228	32,410	35,184	274,944
2018	187,718	22,012	33,141	34,851	277,722
2019	189,913	22,603	33,723	34,475	280,714
2020	190,073	26,148	34,124	32,120	282,465
2021	192,586	23,858	34,879	34,110	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

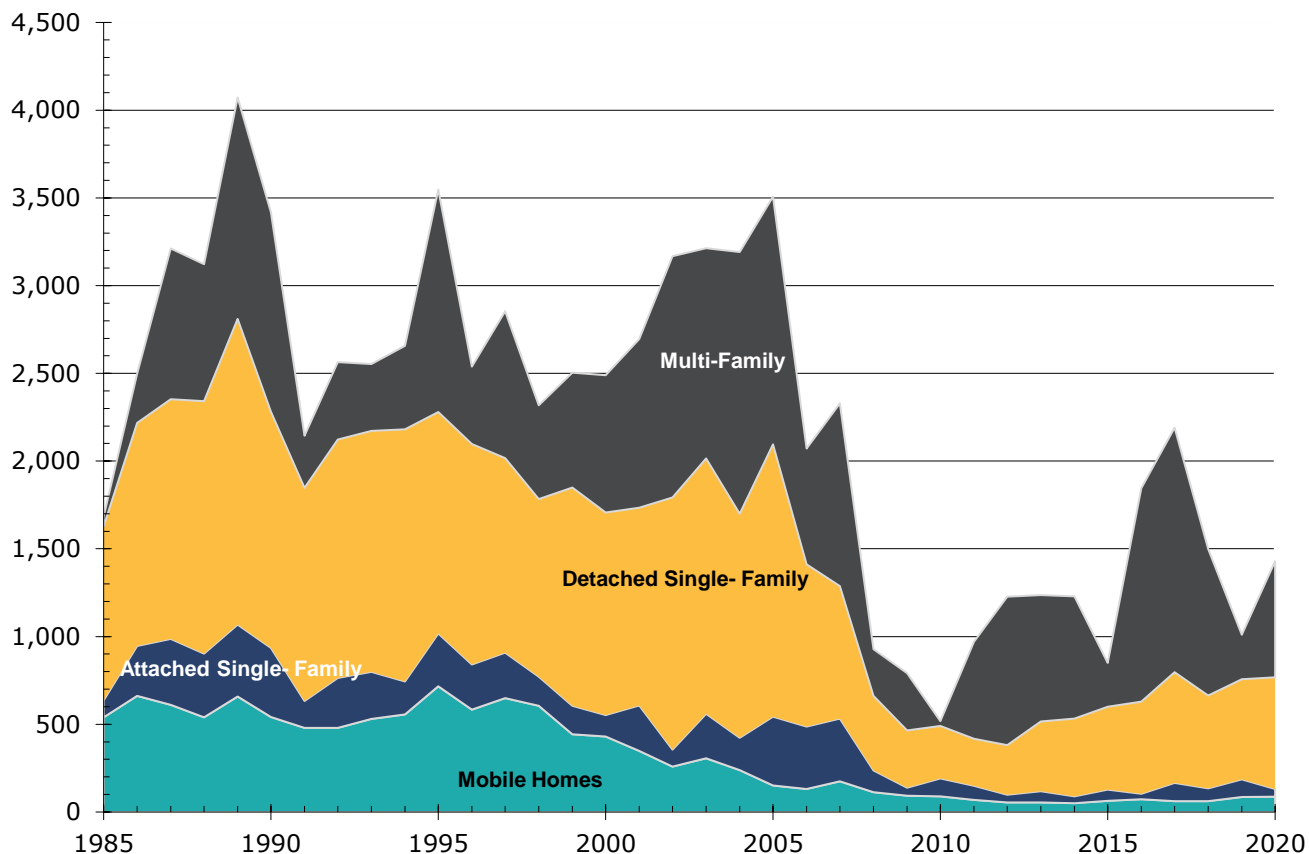
Trend: There were 681 permits issued for new single-family (detached and attached) homes in 2020, the most since 2017 and nearly 10% higher than the 2015-2019 annual average of 620. There were an average of around 510 units built per year in the 2010s, compared with the annual average of 1,260 new single-family 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 2020 included Grand Reserve Capital Circle and Lafayette Gardens.

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	-53.9%
2020	637	44	662	1,343	87	1,430	-4.6%

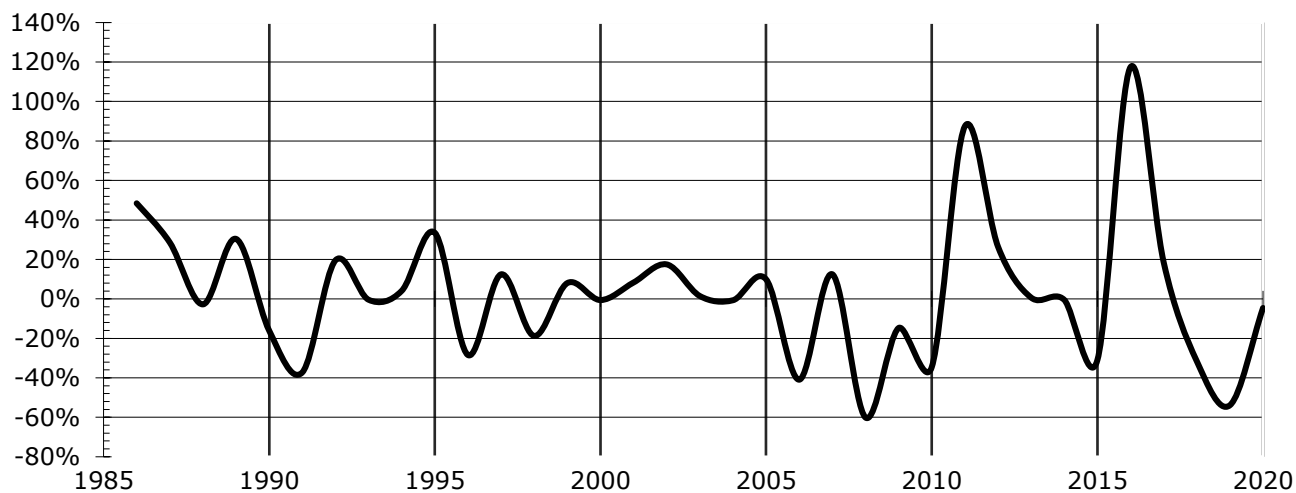
*Mobile home figures do not include permits issued within mobile home parks

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

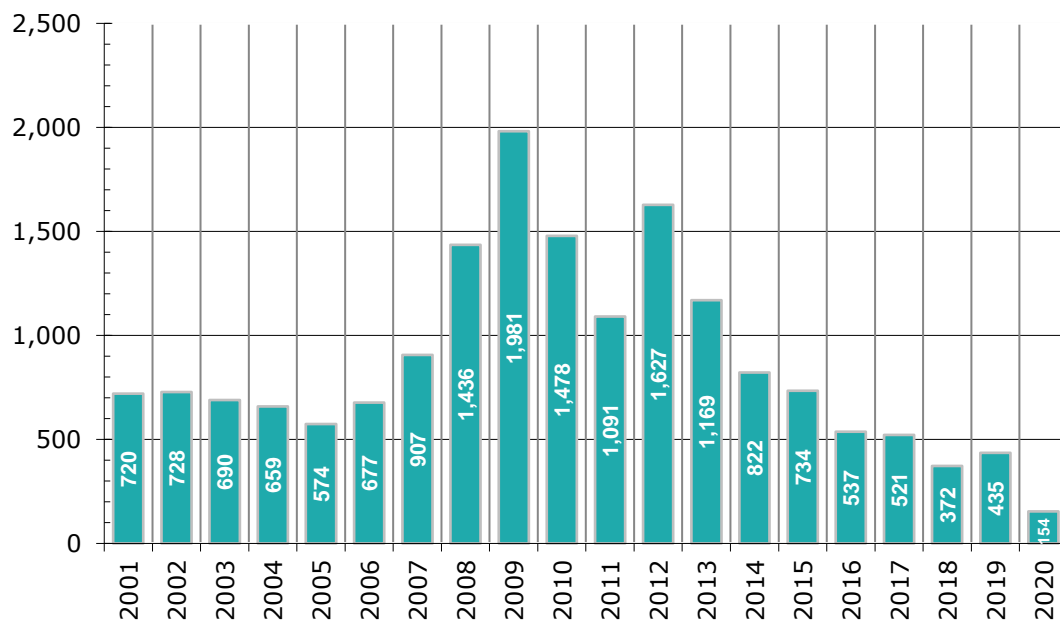
Mortgage Foreclosure Cases

Mortgage foreclosure cases decreased by 59% in 2020 when compared to 2019. The statewide suspension of mortgage foreclosures by executive order from April through September skewed the 2020 total.

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%
2020	154	-59%

Source: Leon County Clerk of Courts

Leon County Mortgage Foreclosure Cases





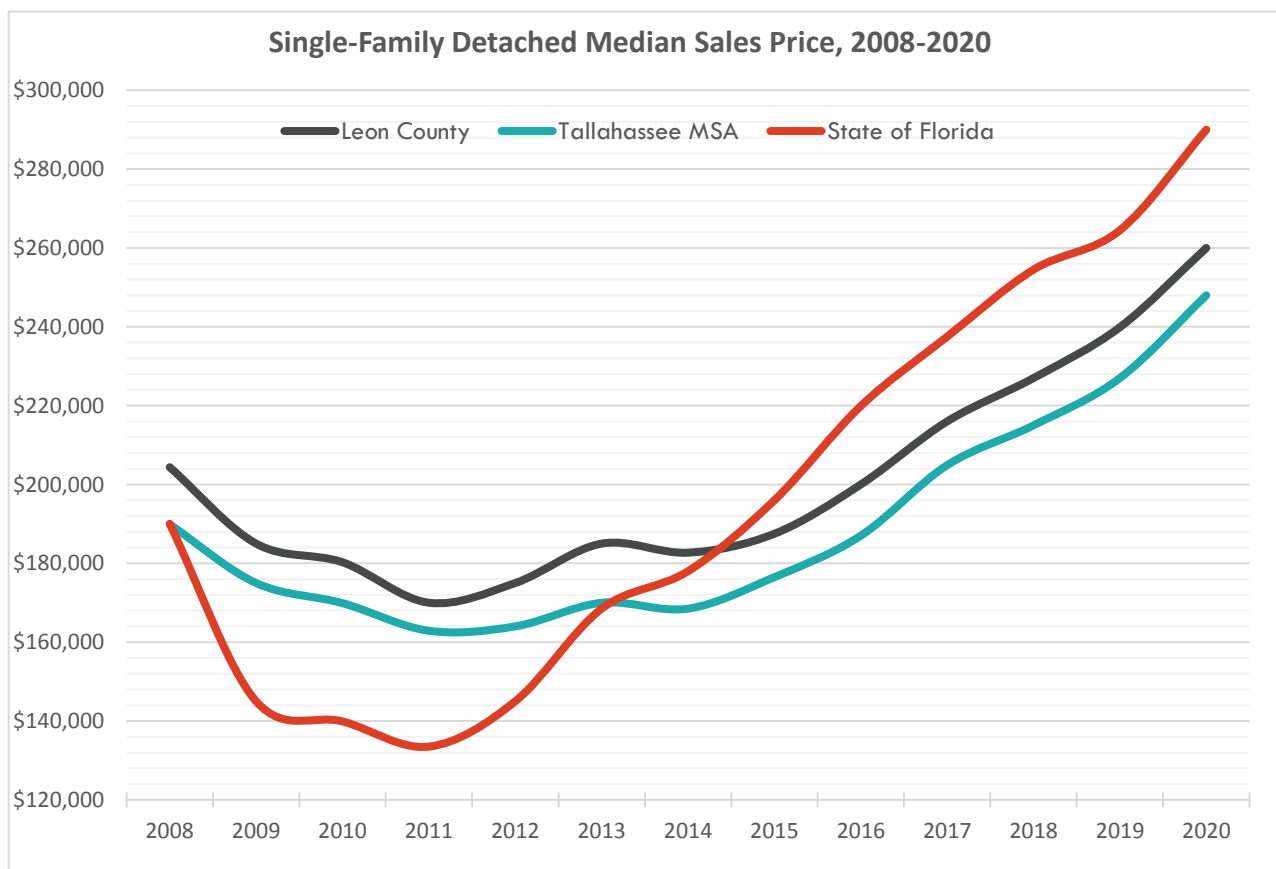
Residential and Commercial Development

Single-Family Detached Home Sales and Median Price

Trend: The median sales price for single family homes was up 8.4% in Leon County, 9.3% for the Tallahassee MSA, and 9.6% statewide in 2020 from 2019. The median sales price increased 46% between 2010 and 2020 for the Tallahassee MSA, while the statewide median sales price increased 107% during the same time.

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
2020	3,483	\$260,000	4,656	\$248,000	310,378	\$290,000

Source: Tallahassee Board of Realtors MLS

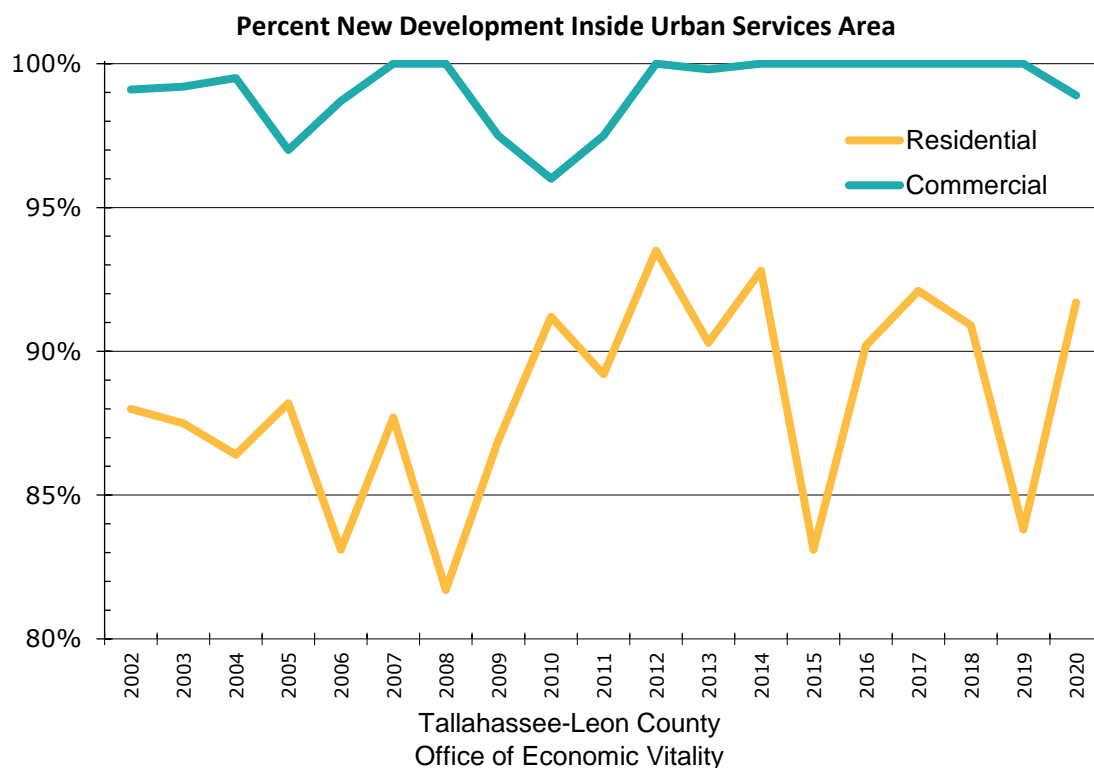


Trend: The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA). The location and size of the USA is based upon the area necessary to accommodate 90% of new residential dwelling units within the County by the Plan Horizon.

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%
2020	91.7%	98.9%

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



Residential and Commercial Development:

Food Service, Apartments, and Lodging Facilities

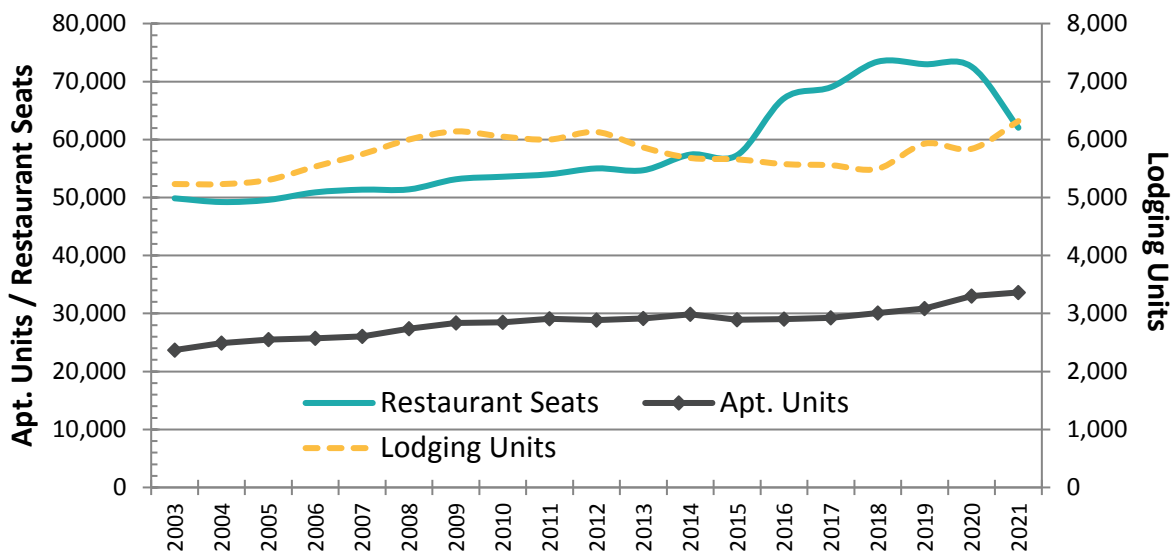
Trend: In the five years between 2015 and 2020, the total number of restaurant seats available in Leon County increased by 27%, apartment units increased 14%, and hotel and motel rooms and units available increased by around 3%. In 2021, total restaurant seats decreased 14.5% from 2020, while apartments increased 1.8% and hotel and motel units increased by 8.2% in 2020.

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
2021	664	62,028	449	33,625	66	6,318

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

Source: Florida Department of Business and Professional Regulation, Division of Hotels & Restaurants

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



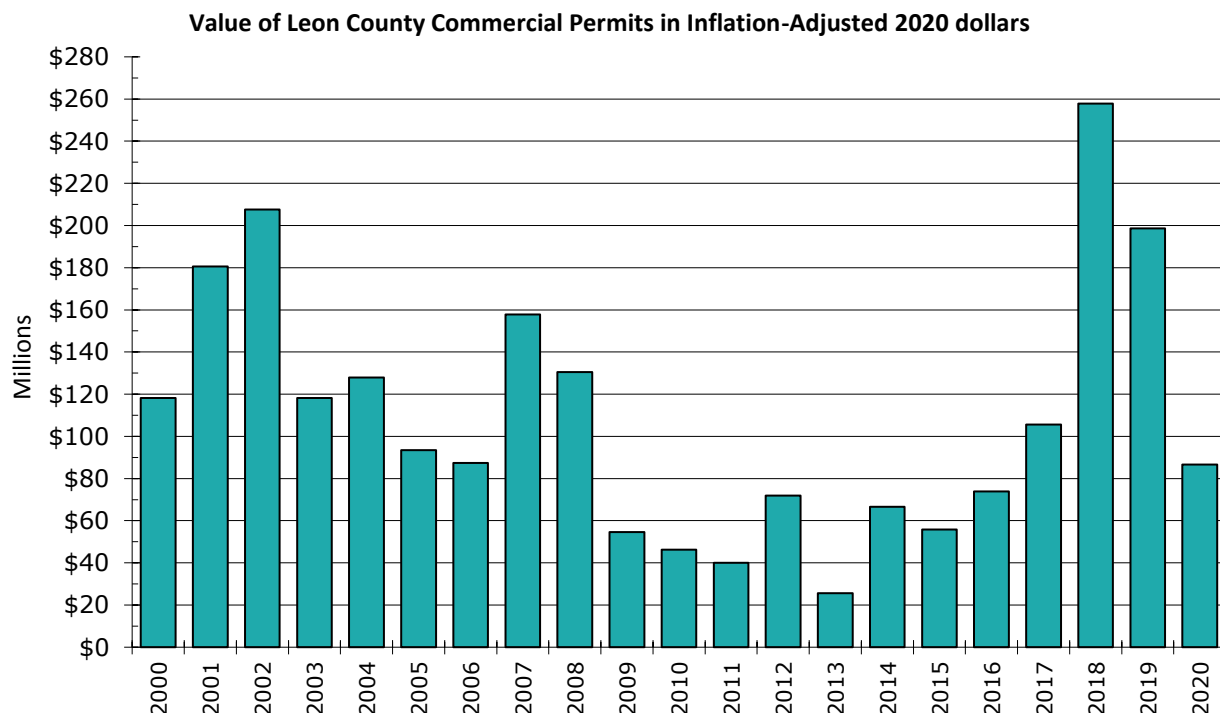
Residential and Commercial Development

Commercial Building Permits Issued - New Construction

Trend: The value of commercial permits issued for new construction in 2020 totaled \$86.7 million. Adjusted for inflation, total commercial permit value in the past five years was over \$722 million, while total inflation-adjusted commercial permit value in the prior ten years totaled \$982 million.

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2020 Dollars (\$Millions)
2000	119	\$78.7	\$118.2
2001	140	\$123.5	\$180.5
2002	129	\$144.3	\$207.6
2003	104	\$84.1	\$118.2
2004	106	\$93.4	\$127.9
2005	98	\$70.5	\$93.4
2006	109	\$68.0	\$87.3
2007	83	\$126.4	\$157.8
2008	88	\$108.5	\$130.5
2009	48	\$45.2	\$54.6
2010	30	\$39.0	\$46.3
2011	26	\$34.7	\$40.0
2012	54	\$63.7	\$71.8
2013	25	\$23.1	\$25.7
2014	39	\$60.9	\$66.6
2015	40	\$51.1	\$55.8
2016	55	\$68.5	\$73.8
2017	88	\$100.0	\$105.5
2018	67	\$254.8	\$257.8
2019	55	\$198.7	\$198.7
2020	58	\$86.7	\$86.7

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

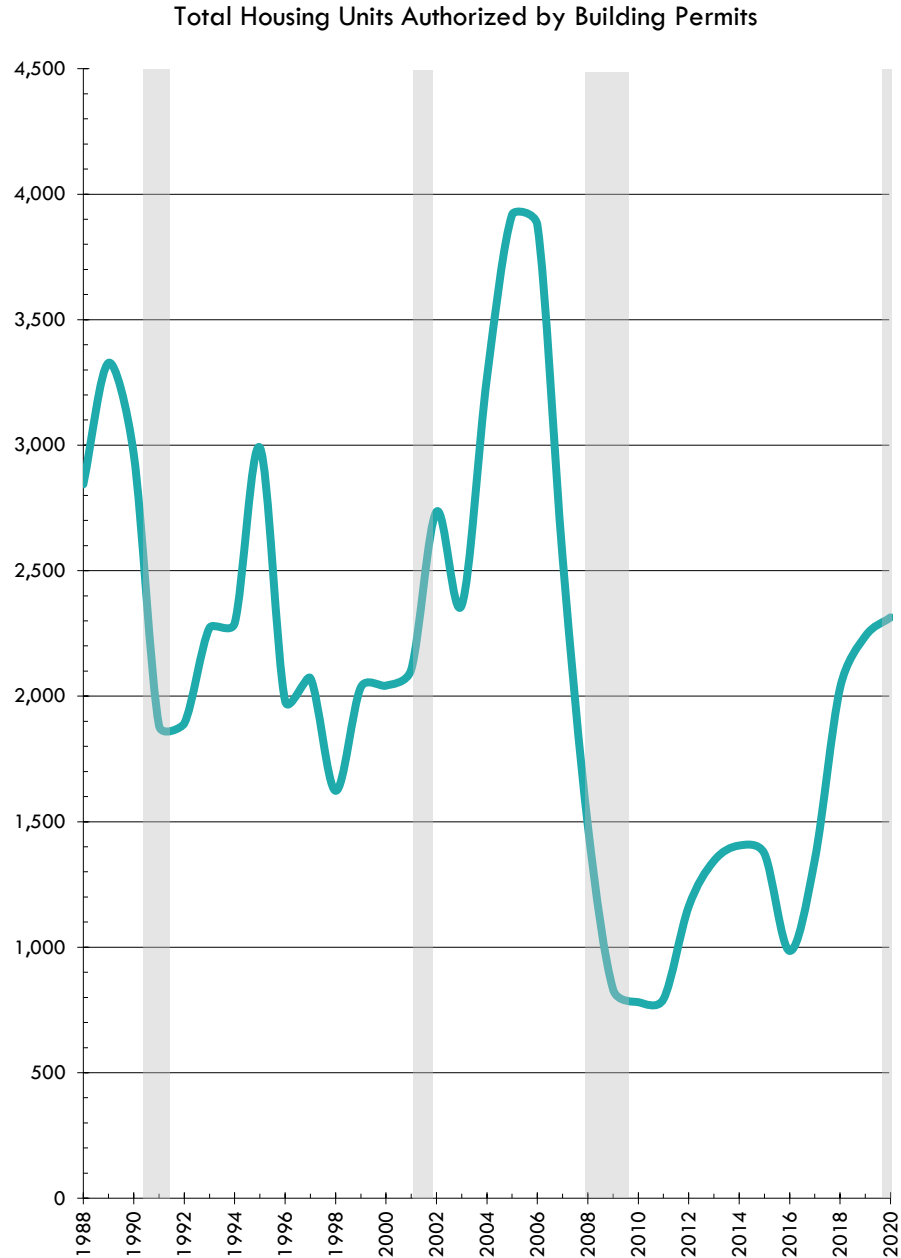


Residential Development:

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	2,844
1989	3,328
1990	2,963
1991	1,883
1992	1,891
1993	2,272
1994	2,291
1995	2,990
1996	1,981
1997	2,072
1998	1,623
1999	2,035
2000	2,042
2001	2,106
2002	2,735
2003	2,362
2004	3,268
2005	3,919
2006	3,877
2007	2,552
2008	1,485
2009	832
2010	781
2011	793
2012	1,162
2013	1,344
2014	1,405
2015	1,373
2016	985
2017	1,349
2018	2,033
2019	2,239
2020	2,314



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

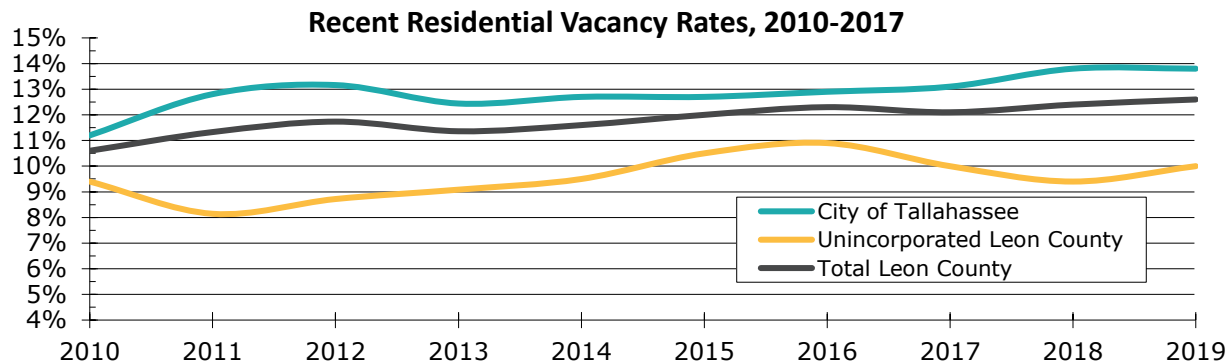
Source: U.S. Bureau of the Census (retrieved by FRED, Federal Reserve Bank of St. Louis).

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

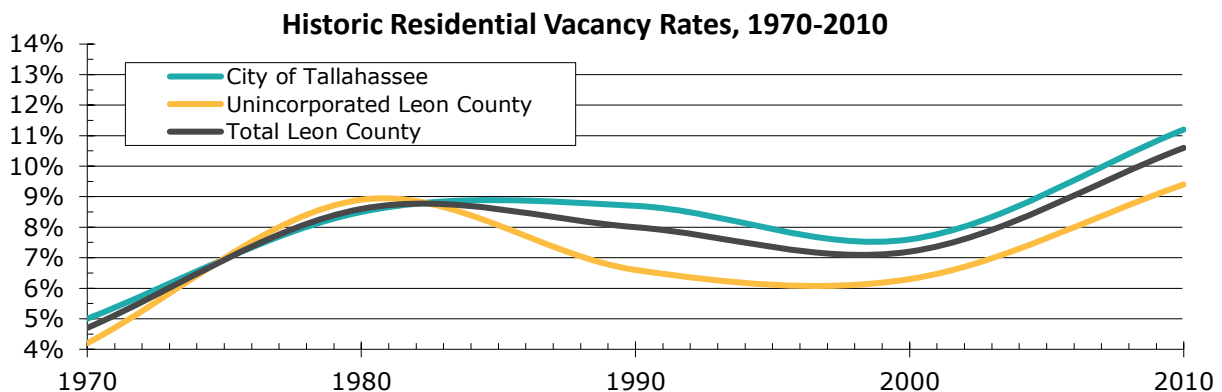
Year	City of Tallahassee	Unincorporated Leon County	Total Leon County
2010	11.2%	9.4%	10.6%
2011	12.8%	8.1%	11.3%
2012	13.2%	8.7%	11.7%
2013	12.4%	9.1%	11.4%
2014	12.7%	9.5%	11.6%
2015	12.7%	10.5%	12.0%
2016	12.9%	10.9%	12.3%
2017	13.1%	10.0%	12.1%
2018	13.8%	9.4%	12.4%
2019	13.8%	10.0%	12.6%



Source: U.S. Department of Commerce, Bureau of the Census, 2010 Decennial Census, 5-Year American Community Survey, 2011 to 2019, Table DP04.

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.

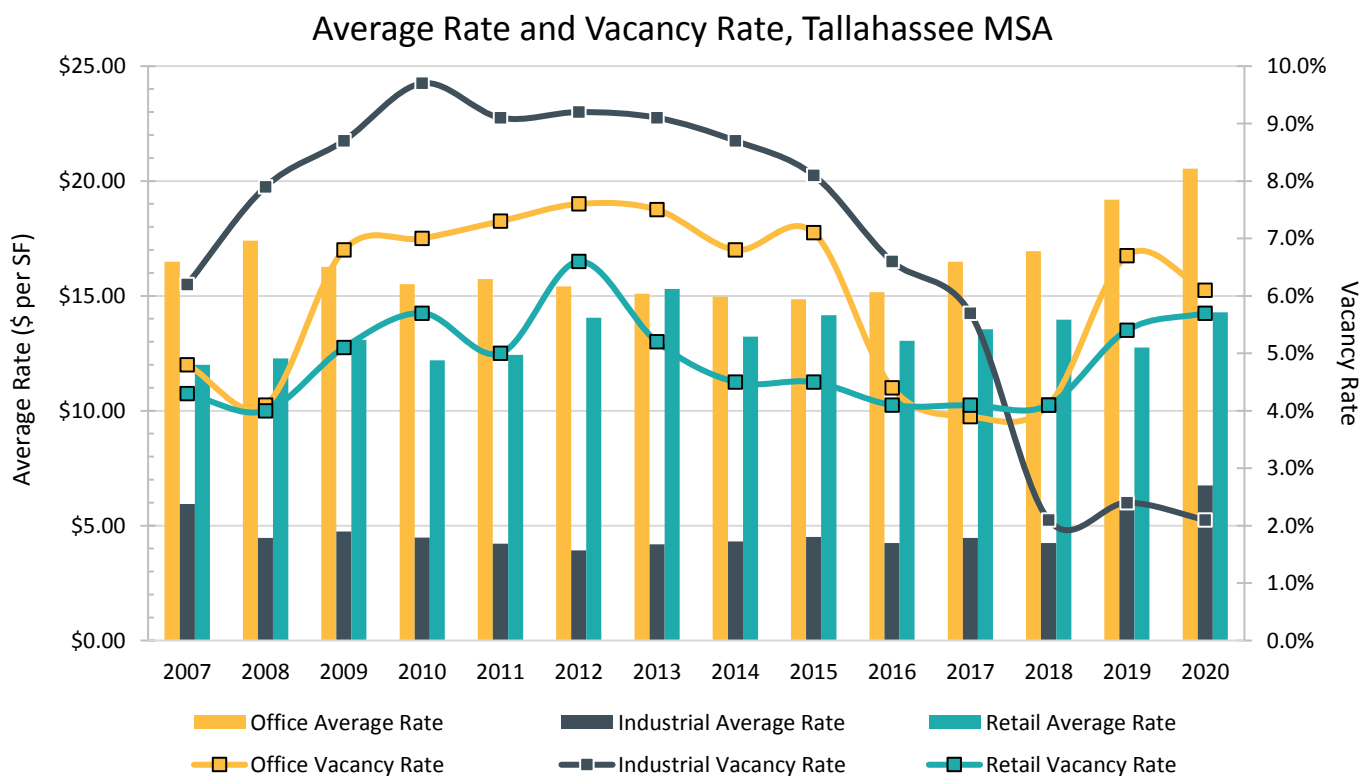
Residential and Commercial Development Office, Industrial, and Retail Market Average Lease Rate & Vacancy Rate

Trend: Since 2016, lease rates for Office uses have averaged \$17.66 per SF, with an average annual vacancy rate of 5%. Industrial uses lease and vacancy rates averaged \$5.16 and 3.8%, respectively; Retail uses, \$13.52 and 4.7%.

Year	Office Average Rate	Office Vacancy Rate	Industrial Average Rate	Industrial Vacancy Rate	Retail Average Rate	Retail Vacancy Rate
2007	\$16.48	4.8%	\$5.94	6.2%	\$12.00	4.3%
2008	\$17.41	4.1%	\$4.47	7.9%	\$12.28	4.0%
2009	\$16.26	6.8%	\$4.74	8.7%	\$13.09	5.1%
2010	\$15.51	7.0%	\$4.48	9.7%	\$12.19	5.7%
2011	\$15.74	7.3%	\$4.21	9.1%	\$12.43	5.0%
2012	\$15.41	7.6%	\$3.92	9.2%	\$14.05	6.6%
2013	\$15.09	7.5%	\$4.19	9.1%	\$15.30	5.2%
2014	\$14.97	6.8%	\$4.31	8.7%	\$13.23	4.5%
2015	\$14.85	7.1%	\$4.51	8.1%	\$14.16	4.5%
2016	\$15.16	4.4%	\$4.25	6.6%	\$13.05	4.1%
2017	\$16.49	3.9%	\$4.46	5.7%	\$13.55	4.1%
2018	\$16.94	4.1%	\$4.24	2.1%	\$13.97	4.1%
2019	\$19.19	6.7%	\$6.09	2.4%	\$12.75	5.4%
2020	\$20.54	6.1%	\$6.75	2.1%	\$14.29	5.7%

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



Residential and Commercial Development Student & Multifamily Housing Effective Rent & Vacancy Rate

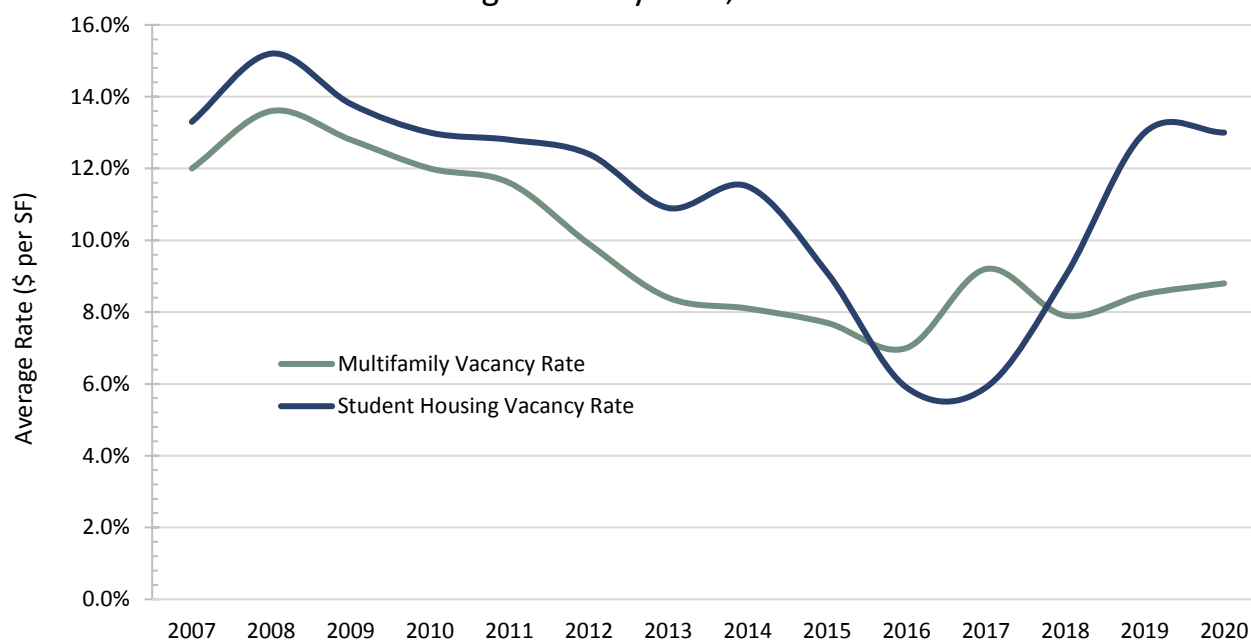
Trend: From 2016 to 2020, effective rents for Multifamily housing have increased by an average of 3.6% per year, with an average annual vacancy rate of 8.3%. Student housing effective rents increased by an average of 0.7% per year, with an annual average vacancy rate of 9.4%.

Year	Multifamily Effective Rent (\$ per SF)	Multifamily Vacancy Rate	Student Housing Effective Rent (\$ per Bed)	Student Housing Vacancy Rate
2007	\$0.81	12.0%	\$617	13.3%
2008	\$0.80	13.6%	\$608	15.2%
2009	\$0.78	12.8%	\$591	13.8%
2010	\$0.79	12.0%	\$596	13.0%
2011	\$0.80	11.6%	\$602	12.8%
2012	\$0.81	9.9%	\$607	12.4%
2013	\$0.81	8.4%	\$619	10.9%
2014	\$0.82	8.1%	\$614	11.5%
2015	\$0.83	7.7%	\$628	9.1%
2016	\$0.87	7.0%	\$641	5.9%
2017	\$0.89	9.2%	\$654	5.9%
2018	\$0.95	7.9%	\$644	9.0%
2019	\$0.98	8.5%	\$672	13.0%
2020	\$0.99	8.8%	\$650	13.0%

Note: Effective Rate for Multifamily Housing in \$ per SF. Effective Rate for Student Housing in \$ per Bed.

Source: CoStar Property

Average Vacancy Rate, Tallahassee MSA



Residential and Commercial Development

New Elevators in Leon County

New Elevators Installed, with Total Landings by Building Type*

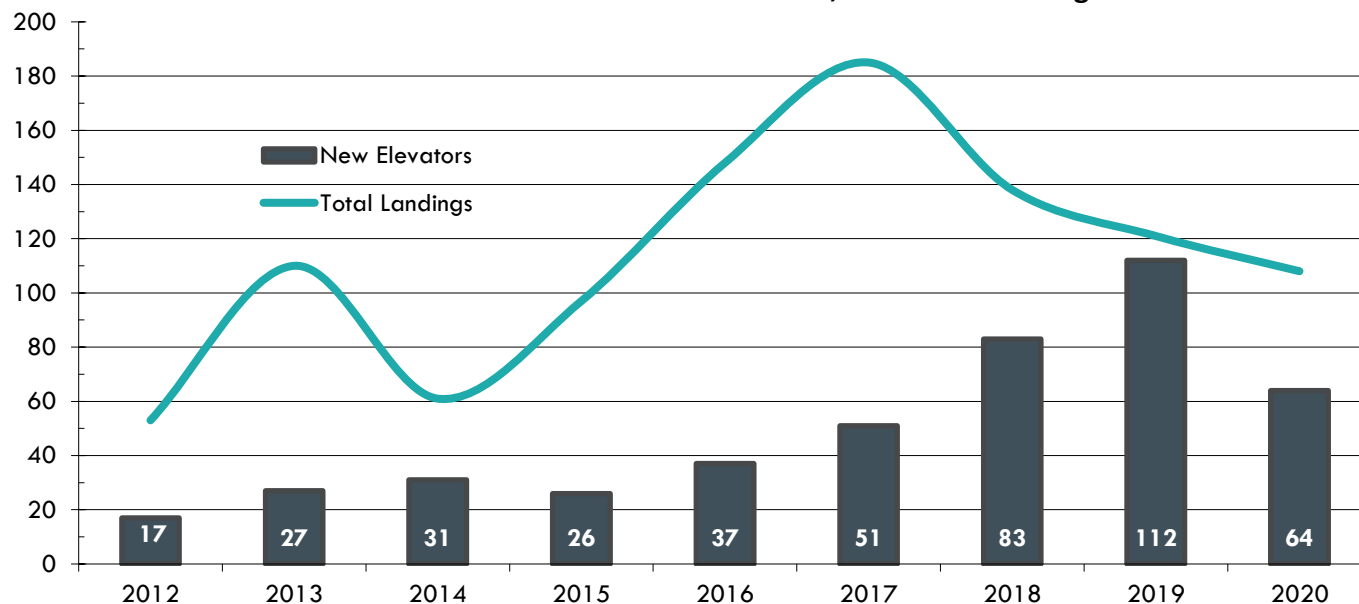
Trend: Measuring how many new elevators have been installed each year helps in the overall assessment of development and redevelopment. It gives a basic approximation for intensity of commercial and institutional development, and also is an indicator of dense residential development.

Item	2012	2013	2014	2015	2016	2017	2018	2019	2020
New Elevators	17	27	31	26	37	51	83	112	64
Total Landings	53	110	61	97	148	185	138	121	108
<i>Total Landings by Building Type:</i>									
Church			6						
Commercial	39	54	13	31	37	53	16	51	70
Condominium		19	4	5	6	14		6	
Food Service				3			2		
FSU, FAMU, TCC		28	38	9	59	6	29		32
Hospital/Medical	10				8	67	5	9	
Local Government	2			3	3				
Public Lodging		5		46	31	41	86	51	
School	2	4			4	4		4	2
State Agency									4

*Includes Initial Installations and Relocations

Source: Florida Department of Business and Professional Regulation

New Elevators Installed or Relocated, with Total Landings



Innovation:

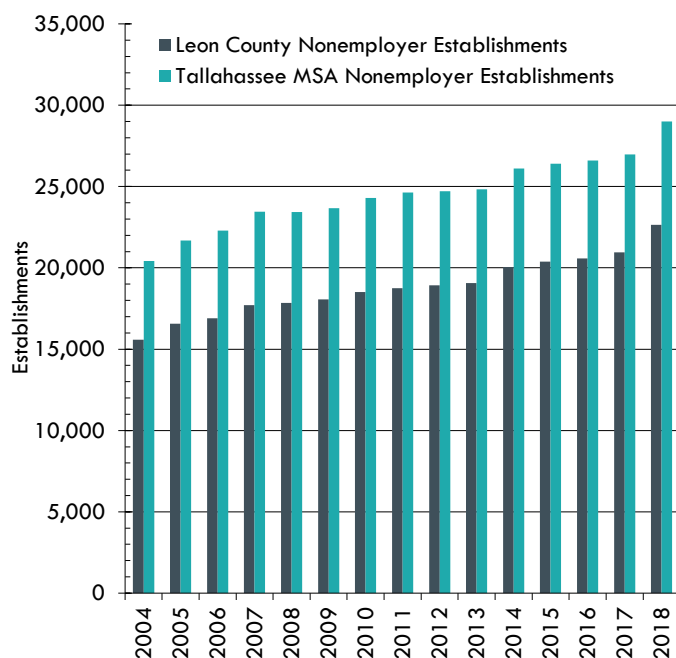
Nonemployer Statistics

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.

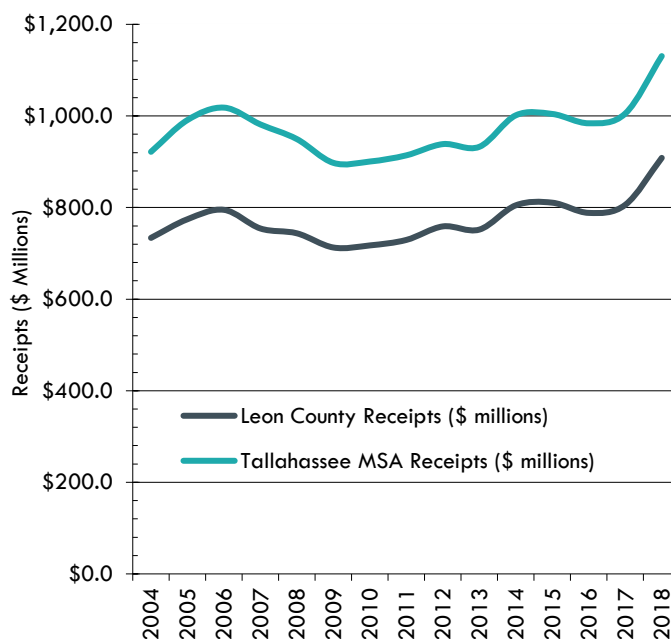
Year	Leon County Nonemployer Establishments	Leon County Receipts (\$ millions)	Tallahassee MSA Nonemployer Establishments	Tallahassee MSA Receipts (\$ millions)
2004	15,575	\$733.7	20,430	\$921.7
2005	16,568	\$774.5	21,683	\$991.1
2006	16,898	\$795.0	22,291	\$1,018.2
2007	17,700	\$754.2	23,452	\$981.4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

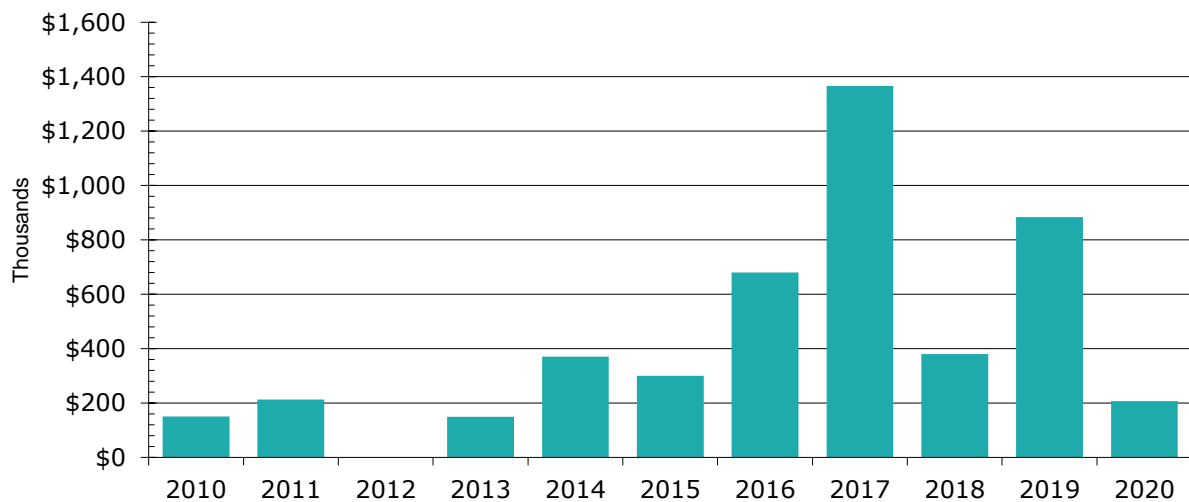
Trend: Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) are federal programs encouraging domestic small businesses to engage in research and development with potential for commercialization. Through competitive awards, SBIR and STTR help small businesses explore their technological potential and give incentive to profit from commercialization. Since 2010, Leon County firms have been awarded nearly \$4.7 million, with 46% coming from the National Science Foundation and 45% 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
2020	\$206,500

Awarding Agency	Percent Awards, 2010-2020
National Science Foundation	46.1%
Department of Energy	44.6%
Department of Defense	4.7%
Department of Health and Human Services	4.6%
Total	100.0%

Source: Small Business Innovation Research

SBIR/STTR Grant Awards, 2010-2020



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

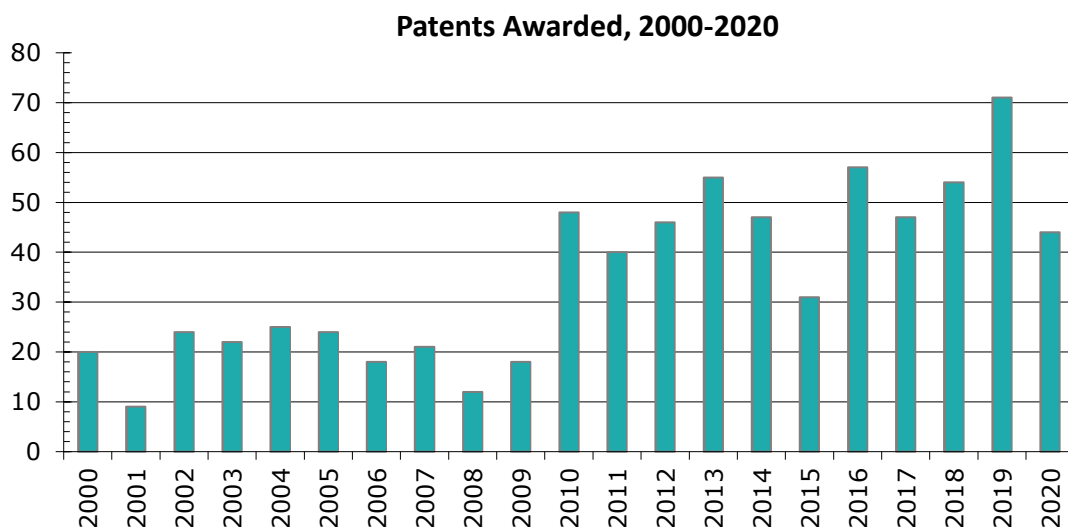
Innovation:

Patents Awarded in Leon County

Trend: The average annual number of patents awarded in Leon County during the 2000s was 19, while the annual average was 49 in the 2010s.

Year	Patents	Change from Prior Year
2000	20	
2001	9	-11
2002	24	15
2003	22	-2
2004	25	3
2005	24	-1
2006	18	-6
2007	21	3
2008	12	-9
2009	18	6
2010	48	30
2011	40	-8
2012	46	6
2013	55	9
2014	47	-8
2015	31	-16
2016	57	26
2017	47	-10
2018	54	7
2019	71	17
2020	44	-27

Source: PatentsView, supported by the U.S. Patent and Trademark Office



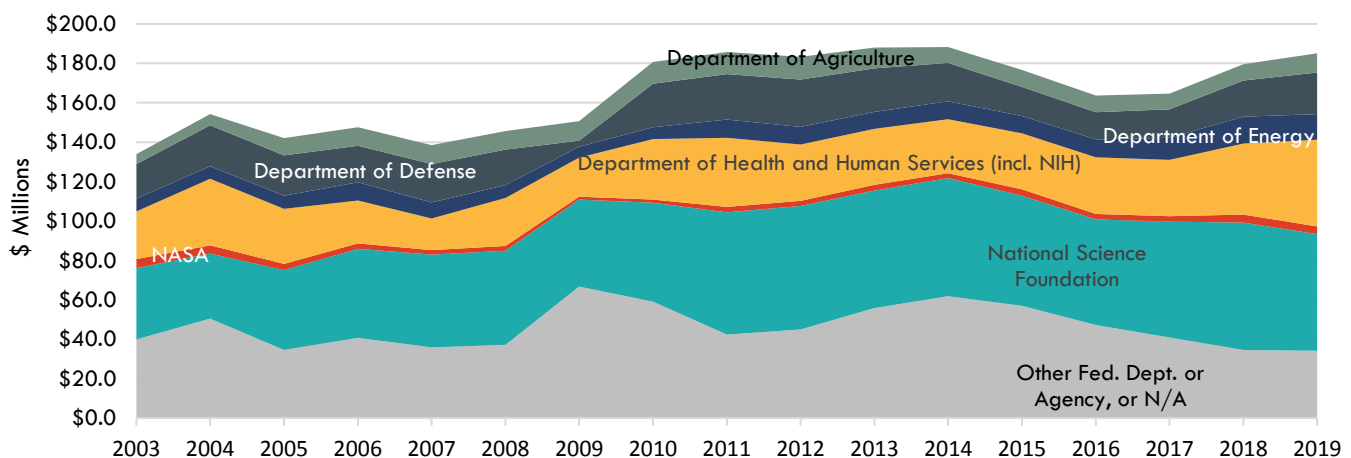
Federally Financed R&D and Total R&D Expenditures at FSU & FAMU (\$ Millions)

Trend: Between 2015 and 2019, federally financed R&D expenditures at FSU and FAMU in all fields averaged around \$173.9 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, 19%. During 2015-2019, federally financed R&D accounted for 53% of total R&D expenditures at FSU and FAMU. Total R&D expenditures increased by an average of 4.5% 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
2019	\$9.75	\$21.15	\$12.93	\$44.14	\$3.80	\$59.25	\$34.13	\$185.15	\$371.68

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)

