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DATA DIGEST

2026

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Demographics

Population:

Estimates and Projections

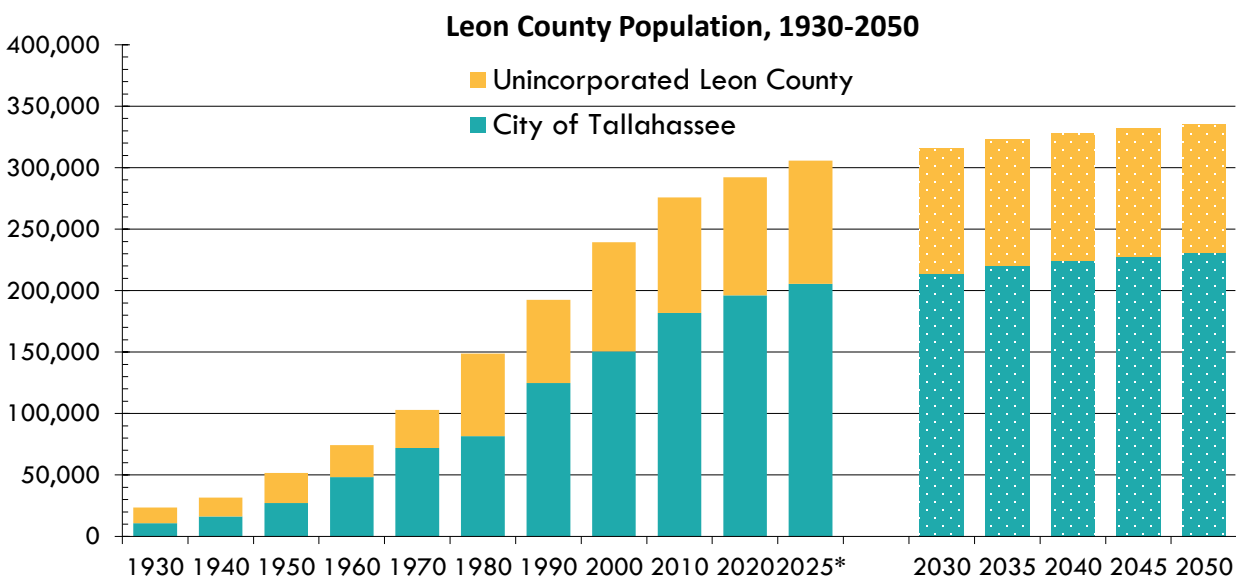
Trend: In both the 2000s and 2010s, the City of Tallahassee accounted for 86% of Leon County's total population increase. In the 1990s, the City accounted for only 55% of total population growth.

Year	Leon County		Total Leon County	4-county Tallahassee Metro Area**
	City of Tallahassee	Unincorporated Leon County		
1930	10,700	12,776	23,476	72,242
1940	16,240	15,406	31,646	80,591
1950	27,237	24,353	51,590	103,718
1960	48,174	26,051	74,225	131,014
1970	71,897	31,150	103,047	157,317
1980	81,548	67,107	148,655	211,810
1990	124,773	67,720	192,493	259,096
2000	150,624	88,828	239,452	320,293
2010	181,736	94,111	275,487	368,857
2020	196,169	96,029	292,198	384,379
2025*	205,623	100,243	305,866	404,606
2030	214,200	101,600	315,800	418,400
2035	220,200	102,500	322,700	428,400
2040	224,300	103,200	327,500	435,700
2045	227,900	103,800	331,700	441,900
2050	231,000	104,300	335,300	447,100

*Estimate

**Includes Gadsden, Jefferson, Leon, and Wakulla counties.

Sources: University of Florida, Bureau of Economic and Business Research (2025 estimates, 2030-2050 Leon County projections); Tallahassee-Leon County Office of Economic Vitality (City of Tallahassee and Unincorporated Leon County 2030-2050) projections assuming continued annexations and share of population growth captured by the City between 2000 and 2020 will continue throughout the projected time horizon).



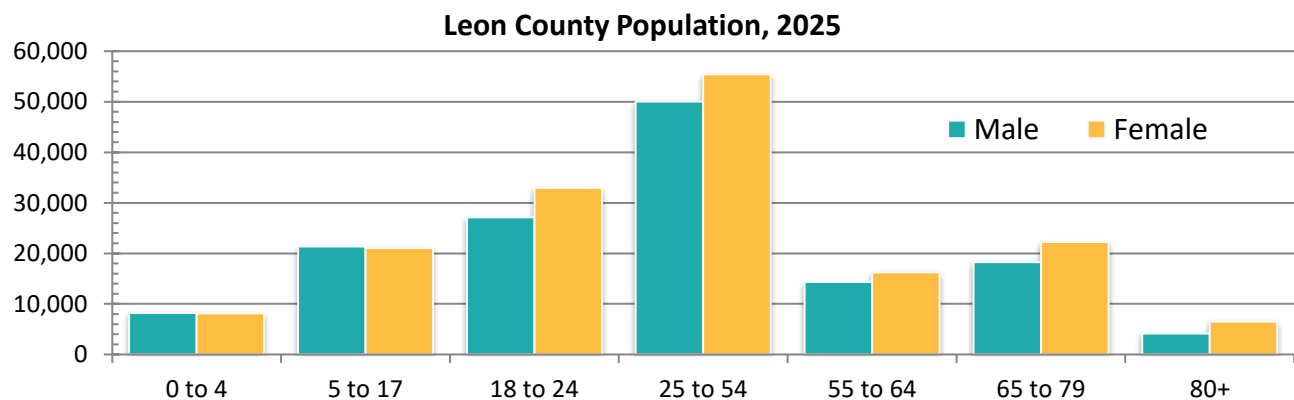


Demographics

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 20.7% (just behind Alachua County) and the sixth smallest percentage aged 65 and older at 15.1% (after Orange, Liberty, Osceola, Union, and Hillsborough counties) in the State of Florida.

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	16,311	5.3%	8,134	2.7%	8,177	2.7%
5 to 17	42,409	13.9%	21,043	6.9%	21,366	7.0%
18 to 24	60,054	19.6%	32,946	10.8%	27,108	8.9%
25 to 54	105,456	34.5%	55,405	18.1%	50,051	16.4%
55 to 64	30,549	10.0%	16,217	5.3%	14,332	4.7%
65 to 79	40,475	13.2%	22,234	7.3%	18,241	6.0%
80+	10,612	3.5%	6,491	2.1%	4,121	1.3%
Total	305,866	100.0 %	162,470	53.1 %	143,396	46.9 %



Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 205", July 2026



Demographics

Population: Race and Ethnicity

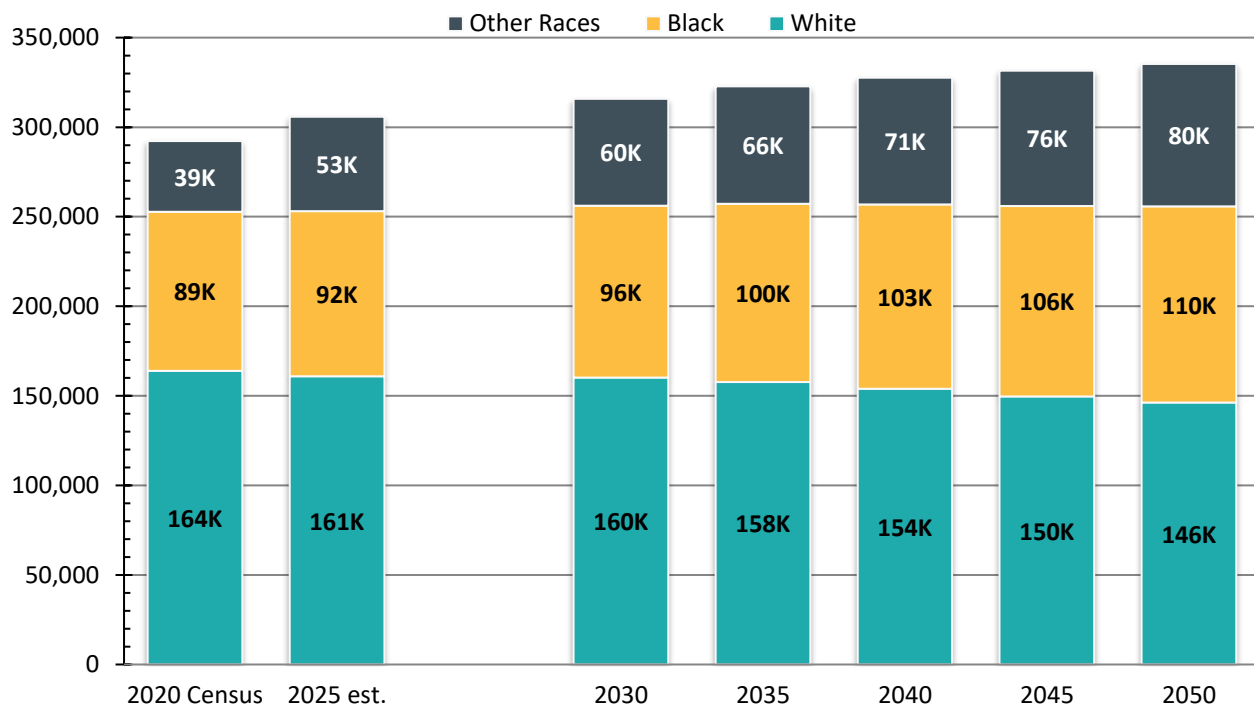
Trend: By race and ethnicity, Leon County's 2025 estimated population includes 53% White, 30% Black, and 17% Other Races. Also, 9% of Leon County residents are of Hispanic origin.

Year	All Races	White	Black	Other Races	Hispanic Origin*
2020 Census	292,198	163,927	88,862	39,409	22,914
2025 est.	305,866	160,861	92,308	52,697	27,921
2030	315,800	160,200	96,000	59,600	32,200
2035	322,700	157,700	99,500	65,500	36,000
2040	327,500	153,900	102,900	70,800	39,500
2045	331,700	149,700	106,300	75,600	42,700
2050	335,300	146,200	109,600	79,500	45,200

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

Source: Census 2020 Table P1; University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 205, July 2026"

Population Estimate and Projections by Race





Demographics

Population: Components of Change

Trend: The components of population change in Leon County during 2000-2010 changed considerably in comparison with 1990-2000. The percentage of Leon County's population growth associated with net migration dropped from 67.1% in 2000 to 56.1% in 2010. Between the 2010 Census and 2020 Census, an estimated 71.7% of Leon County's population growth was attributable to net natural increase (total births less total deaths). Since 2020, an estimated 86% of the population increase for Leon County was from net migration.

	Leon County	Tallahassee MSA	State of Florida
Total Population Change (2020-2025)	13,668	20,308	1,841,074
Net Natural Increase	1,906	707	-101,089
Births	13,920	18,664	1,096,073
Deaths	12,014	17,957	1,197,162
Net Migration	11,762	19,601	1,942,163
Percent due to Natural Increase	13.9%	3.5%	0.0%
Percent due to Net Migration	86.1%	96.5%	100.0%

Source: Source: University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2025



Demographics

Population:

Growth by Age Group

Trend: Although the 80+ and 65-79 age groups represent 17% of Leon County's total population, they are the fastest growing age groups, growing at annual rates of 4.1% and 3.3%, respectively, per year during 2020-2025.

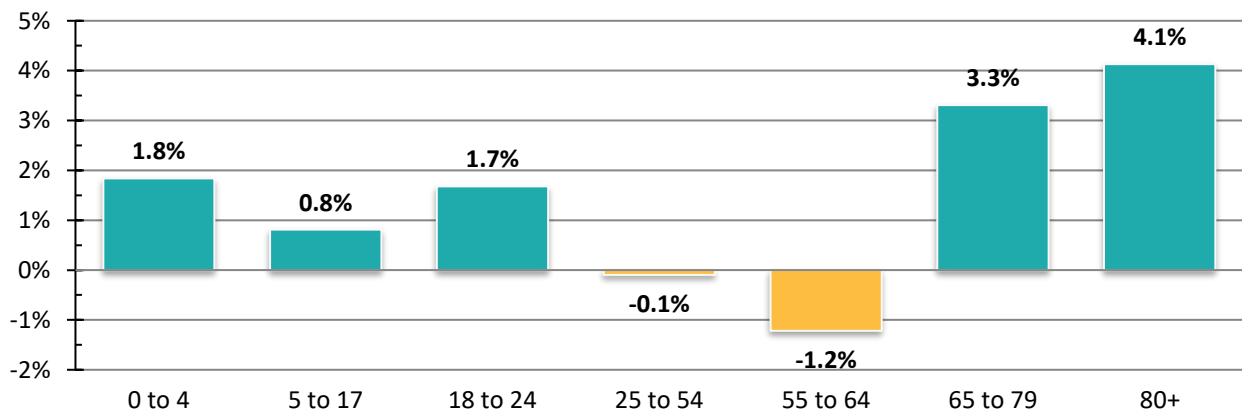
Age Group	Census 2020 Population	2025 Population Estimate	Growth in Population 2020-2025	Percent Growth 2020-2025	Avg. Ann. Growth 2020-2025
0 to 4	14,879	16,311	1,432	9.2%	1.8%
5 to 17	40,728	42,409	1,681	4.0%	0.8%
18 to 24	55,227	60,054	4,827	8.4%	1.7%
25 to 54	105,964	105,456	-508	-0.5%	-0.1%
55 to 64	32,468	30,549	-1,919	-6.1%	-1.2%
65 to 79	34,300	40,475	6,175	16.6%	3.3%
80+	8,632	10,612	1,980	20.7%	4.1%
Total	292,198	305,866	13,668	4.6%	0.9%

Age
Dependency
Ratio*

50.9	56.0
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*Ratio of population under age 18 and those age 65 and older, compared to population ages 18-64.

Age Group Average Annual Growth, 2020-2025



Source: Census 2020 Table DP1; University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 205", July 2026



Demographics

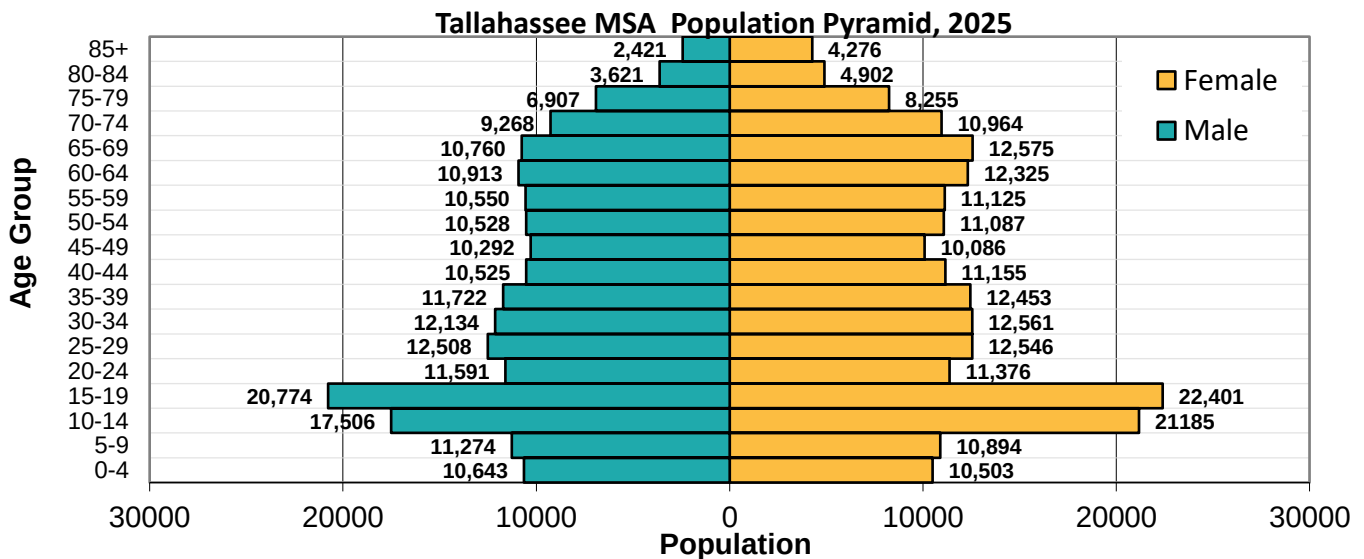
Population:

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 46% of the population; minors and college-age (24 and younger), 36%; and those 65 and older, 18%.

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	21,146	5.2%	10,503	2.6%	10,643	2.6%
5 to 9	20,378	5.0%	10,086	2.5%	10,292	2.5%
10 to 14	22,168	5.5%	10,894	2.7%	11,274	2.8%
15 to 19	38,691	9.6%	21,185	5.2%	17,506	4.3%
20 to 24	43,175	10.7%	22,401	5.5%	20,774	5.1%
25 to 29	22,967	5.7%	11,376	2.8%	11,591	2.9%
30 to 34	25,054	6.2%	12,546	3.1%	12,508	3.1%
35 to 39	24,695	6.1%	12,561	3.1%	12,134	3.0%
40 to 44	24,175	6.0%	12,453	3.1%	11,722	2.9%
45 to 49	21,680	5.4%	11,155	2.8%	10,525	2.6%
50 to 54	21,615	5.3%	11,087	2.7%	10,528	2.6%
55 to 59	21,675	5.4%	11,125	2.7%	10,550	2.6%
60 to 64	23,238	5.7%	12,325	3.0%	10,913	2.7%
65 to 69	23,335	5.8%	12,575	3.1%	10,760	2.7%
70 to 74	20,232	5.0%	10,964	2.7%	9,268	2.3%
75 to 79	15,162	3.7%	8,255	2.0%	6,907	1.7%
80 to 84	8,523	2.1%	4,902	1.2%	3,621	0.9%
85+	6,697	1.7%	4,276	1.1%	2,421	0.6%
Total	404,606	100.0 %	210,669	52.1 %	193,937	47.9 %

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 205", July 2026





Demographics

Population:

Metropolitan Area

Trend: The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was estimated at 404,606 in 2025, up 5.3% from 2020. The Tallahassee MSA's annual rate of growth in the 2020s has been around 1.0%, compared with 0.5% in the 2010s and 1.4% during the decade of the 2000s.

Metropolitan Area (County or Counties)	2025 Pop. Estimate	2020 Census Pop.	2010 Census Pop.	Percent Change 2010- 2020	Annual Growth Rate 2010- 2020	Percent Change 2020- 2025	Annual Growth Rate 2020- 2025
All Metropolitan Areas	22,688,948	20,879,688	18,144,168	15.1%	1.4%	8.7%	1.7%
Miami-Fort Lauderdale-West Palm Beach (Broward, Miami-Dade, Palm Beach)	6,364,623	6,138,333	5,564,657	10.3%	1.0%	3.7%	0.7%
Tampa-St. Petersburg-Clearwater (Hernando, Hillsborough, Pasco, Pinellas)	3,403,788	3,175,275	2,783,243	14.1%	1.3%	7.2%	1.4%
Orlando-Kissimmee-Sanford (Lake, Orange, Osceola, Seminole)	2,961,947	2,673,376	2,134,406	25.3%	2.3%	10.8%	2.1%
Jacksonville (Baker, Clay, Duval, Nassau, St. Johns)	1,802,177	1,605,848	1,345,596	19.3%	1.8%	12.2%	2.3%
North Port-Sarasota-Bradenton (Manatee, Sarasota)	954,485	833,716	702,281	18.7%	1.7%	14.5%	2.7%
Cape Coral-Fort Myers (Lee)	839,223	760,822	618,754	23.0%	2.1%	10.3%	2.0%
Lakeland-Winter Haven (Polk)	846,896	725,046	602,095	20.4%	1.9%	16.8%	3.2%
Deltona-Daytona Beach-Ormond Beach (Flagler, Volusia)	745,247	668,921	590,289	13.3%	1.3%	11.4%	2.2%
Palm Bay-Melbourne-Titusville (Brevard)	667,900	606,612	543,376	11.6%	1.1%	10.1%	1.9%
Port St. Lucie (Martin, St. Lucie)	550,599	487,657	424,107	15.0%	1.4%	12.9%	2.5%
Pensacola-Ferry Pass-Brent (Escambia, Santa Rosa)	549,173	509,905	448,991	13.6%	1.3%	7.7%	1.5%
Ocala (Marion)	433,675	375,908	331,303	13.5%	1.3%	15.4%	2.9%
Naples-Marco Island (Collier)	413,314	375,752	321,520	16.9%	1.6%	10.0%	1.9%
Tallahassee (Gadsden, Jefferson, Leon, Wakulla)	404,606	384,298	367,413	4.6%	0.5%	5.3%	1.0%
Gainesville (Alachua, Gilchrist, Levy)	364,471	339,247	305,076	11.2%	1.1%	7.4%	1.4%
Crestview-Fort Walton Beach-Destin (Okaloosa, Walton)	316,740	286,973	235,865	21.7%	2.0%	10.4%	2.0%



Demographics

Population:

Metropolitan Area

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Metropolitan Area (County or Counties)	2025 Pop. Estimate	2020 Census Pop.	2010 Census Pop.	Percent Change 2010- 2020	Annual Growth Rate 2010- 2020	Percent Change 2020- 2025	Annual Growth Rate 2020- 2025
Panama City-Panama City Beach (Bay, Washington)	223,430	200,534	193,748	3.5%	0.3%	11.4%	2.2%
Punta Gorda (Charlotte)	226,826	186,847	159,978	16.8%	1.6%	21.4%	4.0%
Sebastian-Vero Beach-West Vero Corridor (Indian River)	173,013	159,788	138,028	15.8%	1.5%	8.3%	1.6%
Homosassa Springs (Citrus)	166,500	153,843	141,236	8.9%	0.9%	8.2%	1.6%
Wildwood-The Villages (Sumter)	162,493	129,752	93,420	38.9%	3.3%	25.2%	4.6%
Sebring (Highlands)	107,976	101,235	98,786	2.5%	0.2%	6.7%	1.3%

Sources: Executive Office of the President, U.S. Office of Management and Budget MSA definitions (OMB Bulletin No. 23-01); U.S. Department of Commerce, Bureau of the Census; University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2025



Demographics

Population:

Household Characteristics

Trend: The average household size decreased slightly in Leon County, from 2.35 persons per household in 2010 to 2.29 persons per household in 2020. 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

	Leon County		Florida	
	Households	Average Household Size	Households	Average Household Size
2000 Census	96,521	2.34	6,338,075	2.46
2010 Census	110,945	2.35	7,420,802	2.48
2020 Census	121,085	2.29	8,529,067	2.47
2025 Estimate	127,266	2.28	9,292,338	2.46

Households by Type

	Families	Living Alone	Other Non-Families
Florida	65%	28%	7%
Tallahassee MSA	55%	33%	12%
Leon County	52%	34%	14%
City of Tallahassee	44%	38%	18%
Unincorporated Area	72%	23%	5%
Bradfordville CDP	83%	15%	1%
Woodville CDP	69%	28%	3%

Sources: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Volume 59, Bulletin 202", December 2025; U.S. Department of Commerce, Bureau of the Census, 2024 5-Year American Community Survey, Table S2501



Community and Environment

Drivers Licenses in Leon County

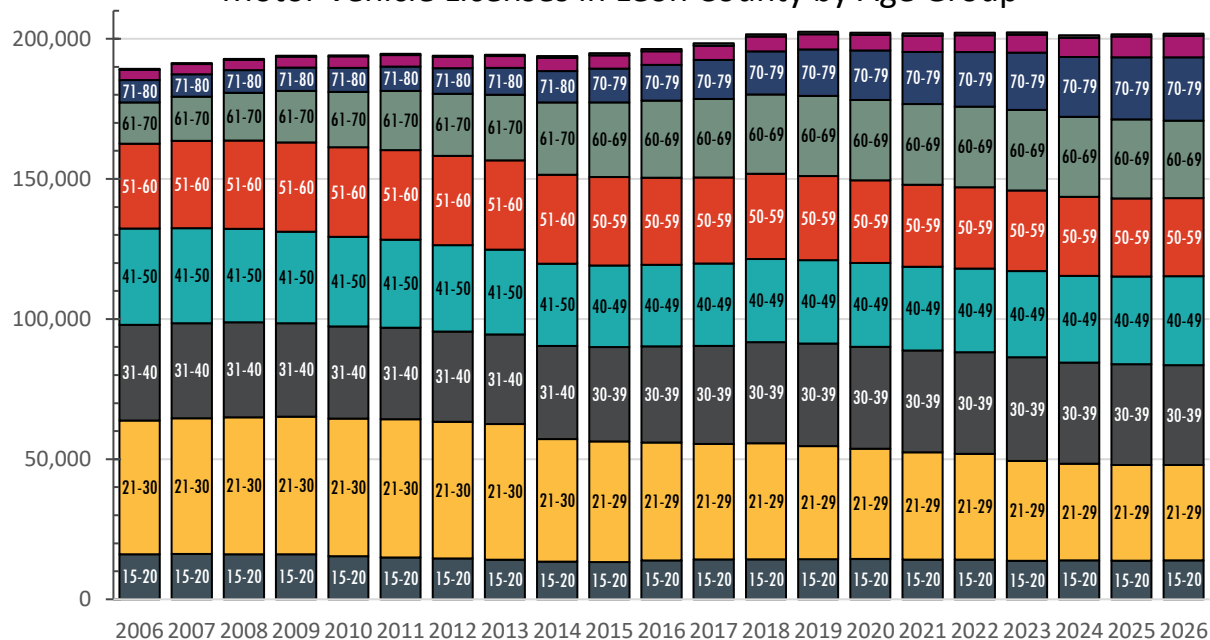
Trend: Between 2015 and 2025, the proportion of drivers licensed in Leon County age 60 or older increased from 23% to 29%, while the proportion age 30 or younger decreased from 29% to 24%. The proportion of female drivers increased every year from 2006 to 2025, and was 53.1% in 2026.

Year	15-20	21-29	30-39	40-49	50-59	60-69	70-79	80-89	90+	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	43,048	33,675	29,099	31,565	26,623	12,052	4,737	784	102,113	92,757
2016	13,869	42,075	34,314	29,096	31,071	27,521	12,750	4,833	854	102,962	93,421
2017	14,226	41,212	34,980	29,398	30,697	28,007	13,926	5,062	860	104,100	94,268
2018	14,271	41,419	36,065	29,664	30,417	28,293	15,377	5,268	867	105,830	95,811
2019	14,311	40,353	36,596	29,752	30,015	28,593	16,580	5,403	883	106,411	96,075
2020	14,408	39,317	36,356	29,924	29,491	28,664	17,671	5,539	840	106,441	95,769
2021	14,172	38,279	36,334	29,869	29,260	28,800	18,588	5,782	877	106,686	95,275
2022	14,169	37,728	36,266	29,847	29,009	28,769	19,486	6,009	933	107,291	94,925
2023	13,736	35,631	37,010	30,739	28,765	28,732	20,452	6,385	841	107,534	94,757
2024	13,846	34,503	36,128	30,950	28,227	28,490	21,351	6,895	833	107,039	94,184
2025	13,792	34,112	35,931	31,345	27,834	28,249	22,161	7,383	808	106,986	94,629
2026	13,923	34,047	35,560	31,798	27,775	27,676	22,620	7,663	822	107,145	94,709

Source: Florida Department of Highway Safety and Motor Vehicles.

Note: Italics above indicates age groups prior to 2015. Ages 21-29 group was Ages 21-30, Ages 30-39 group was Ages 31-40, Ages 40-49 group was Ages 41-50, etc.

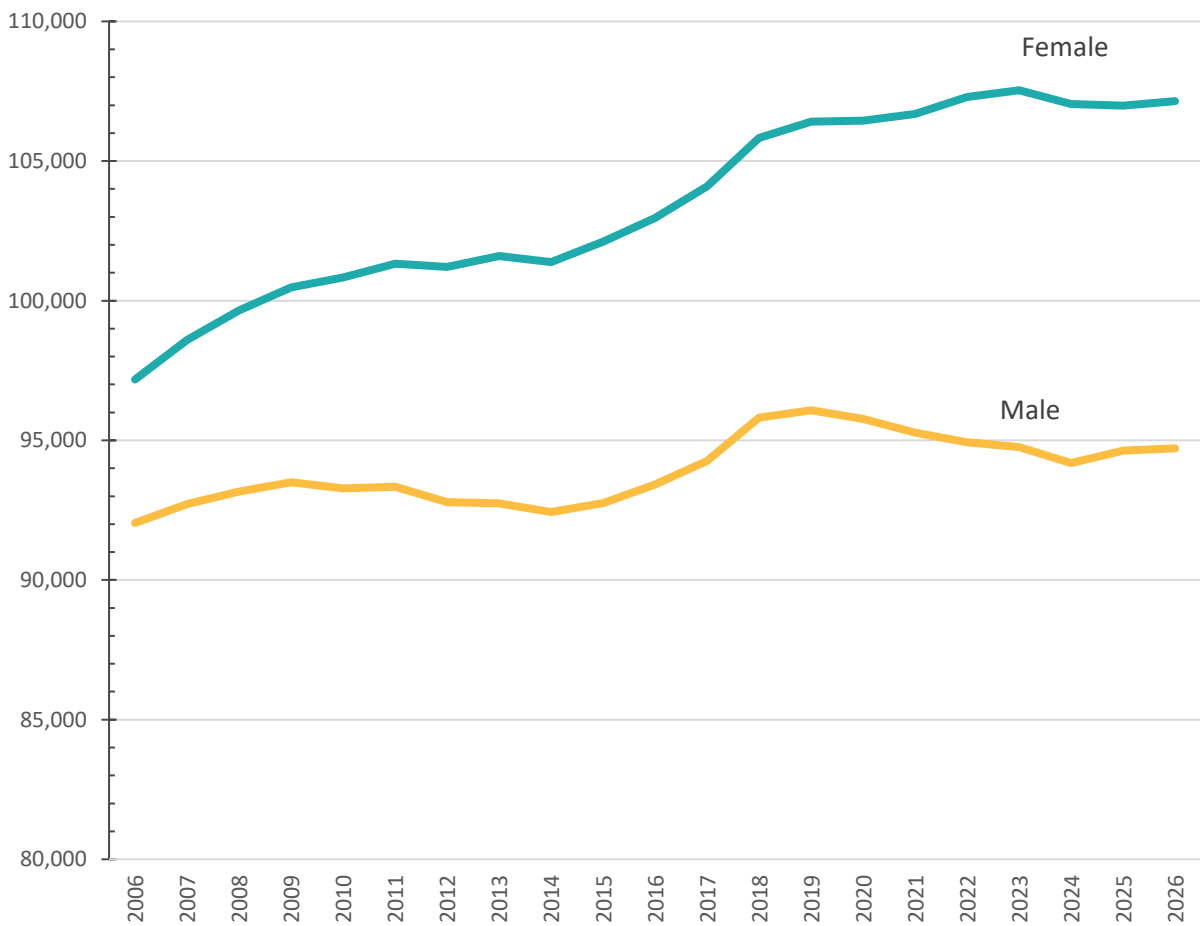
Motor Vehicle Licenses in Leon County by Age Group





Community and Environment
Drivers Licenses in Leon County

Motor Vehicle Licenses in Leon County by Sex





Demographics

Population:

Origins of FSU and FAMU Students (Fall 2025)

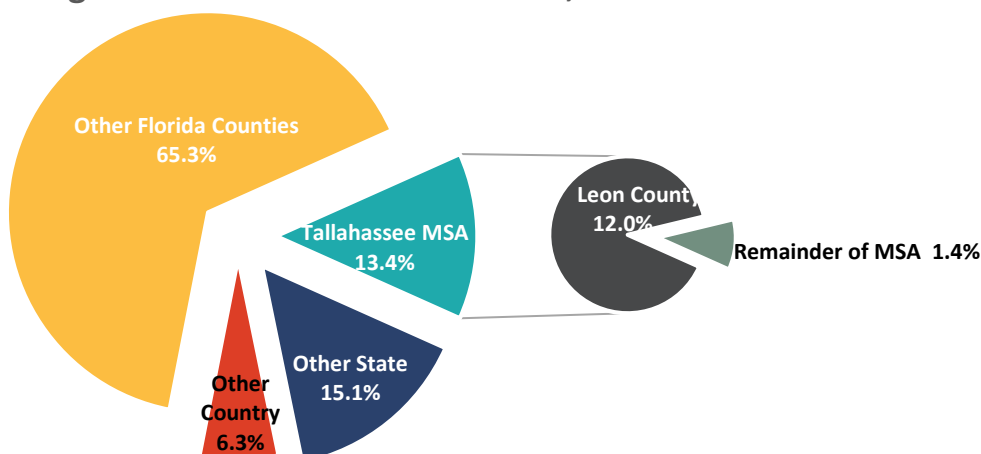
Trend: About 79% of FSU and FAMU students are Florida residents, with the Tallahassee metro area accounting for 13.4%. Broward, Miami-Dade, Hillsborough, Palm Beach, and Orange counties together account for 31% of students. About 15% of students are from another state, and 6% from another country.

Place of Origin	Students	Percent of Total
Florida	43,879	78.7%
Tallahassee MSA	7,462	13.4%
Leon County	6,667	12.0%
Remainder of Tallahassee MSA (Gadsden, Jefferson, Wakulla)	795	1.4%
Outside Tallahassee MSA	36,417	65.3%
Broward	4,087	7.3%
Miami-Dade	3,926	7.0%
Hillsborough	3,326	6.0%
Palm Beach	3,180	5.7%
Orange	2,803	5.0%
Remainder of Florida Counties	19,095	34.3%
Other State	8,416	15.1%
Georgia	1,677	3.0%
New Jersey	587	1.1%
New York	542	1.0%
Texas	517	0.9%
Illinois	456	0.8%
Remainder of Other States	4,637	8.3%
Other Country	3,493	6.3%
Panama	466	0.8%
China	332	0.6%
India	308	0.6%
South Korea	208	0.4%
Brazil	182	0.3%
Remainder of Other Countries	1,997	3.6%

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

Source: State University System of Florida, Board of Governors, Student Instruction File, Fall 2025

Origins of FSU and FAMU Students, Fall 2025





Workforce and Income

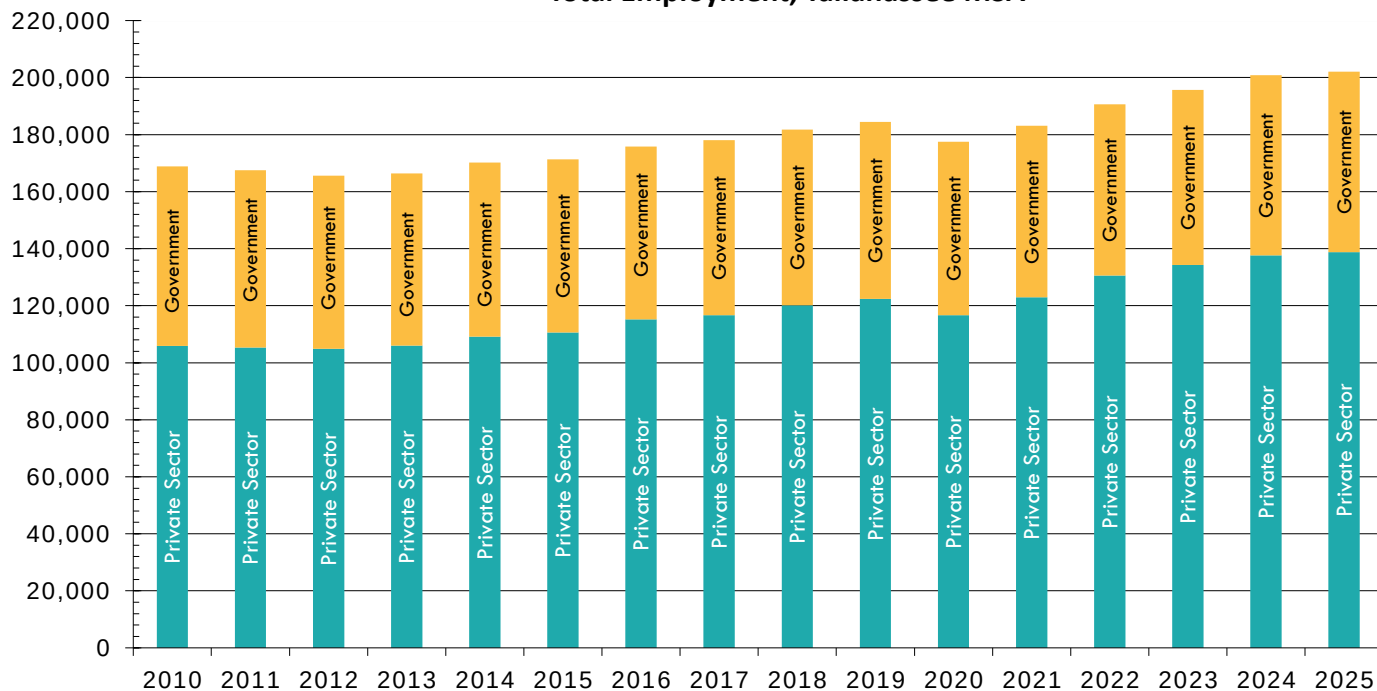
Employment

Trend: Total non-farm employment for the Tallahassee MSA (not seasonally adjusted) in 2025 was 202,000, up 0.5% from 2024 (net increase of around 1,100 jobs). Total private employment was up 0.8% (gain of nearly 1,100 jobs) in 2025 while government employment was up 0.3% over the year.

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	105,900	-1.8%	63,000	0.2%	169,000	-1.1%
2011	105,300	-0.6%	62,200	-1.3%	167,500	-0.9%
2012	104,900	-0.4%	60,700	-2.4%	165,500	-1.2%
2013	106,000	1.0%	60,400	-0.5%	166,400	0.5%
2014	109,100	2.9%	61,100	1.2%	170,200	2.3%
2015	110,600	1.4%	60,700	-0.7%	171,200	0.6%
2016	115,200	4.4%	60,600	-0.3%	175,800	2.7%
2017	116,700	1.3%	61,400	1.3%	178,100	1.3%
2018	120,200	3.0%	61,600	0.3%	181,700	2.0%
2019	122,400	1.8%	62,100	0.8%	184,500	1.5%
2020	116,700	-4.7%	60,800	-2.1%	177,500	-3.8%
2021	123,000	5.4%	60,100	-1.2%	183,100	3.2%
2022	130,600	6.2%	60,000	-0.2%	190,600	4.1%
2023	134,300	2.8%	61,400	2.3%	195,700	2.7%
2024	137,700	2.5%	63,100	2.8%	200,900	2.7%
2025	138,800	0.8%	63,300	0.3%	202,000	0.5%

Source: Florida Commerce, Labor Market Information, Current Employment Statistics

Total Employment, Tallahassee MSA

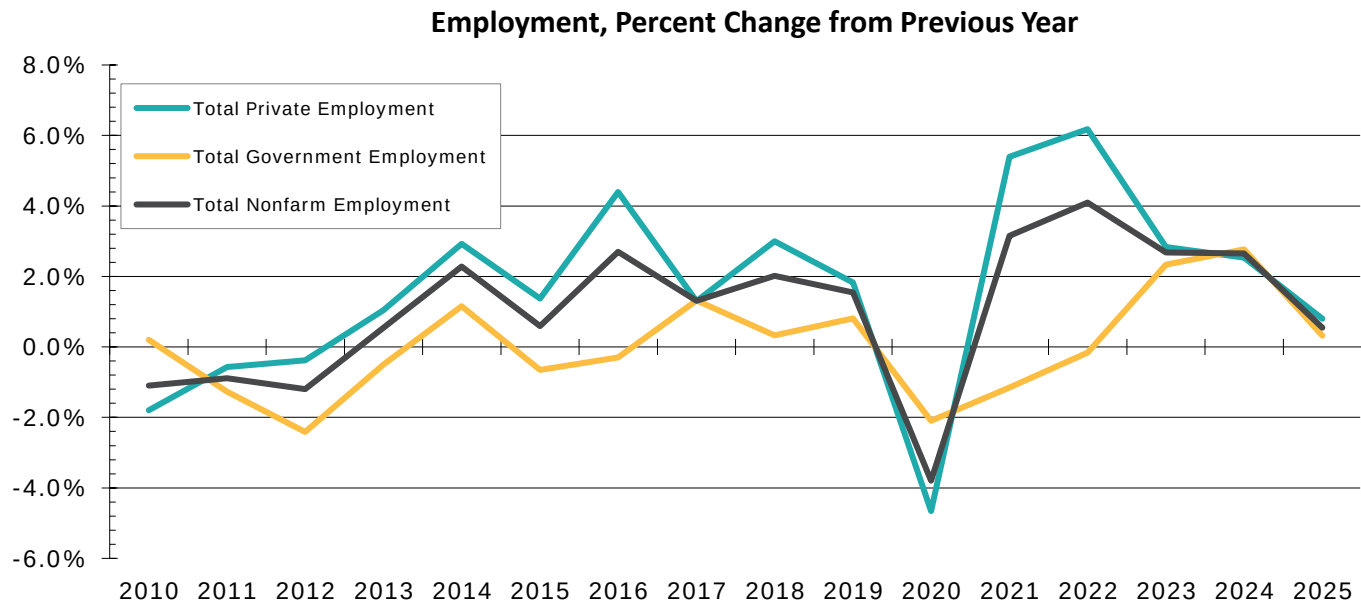




Workforce and Income

Employment

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Workforce and Income

Average Annual Unemployment Rate

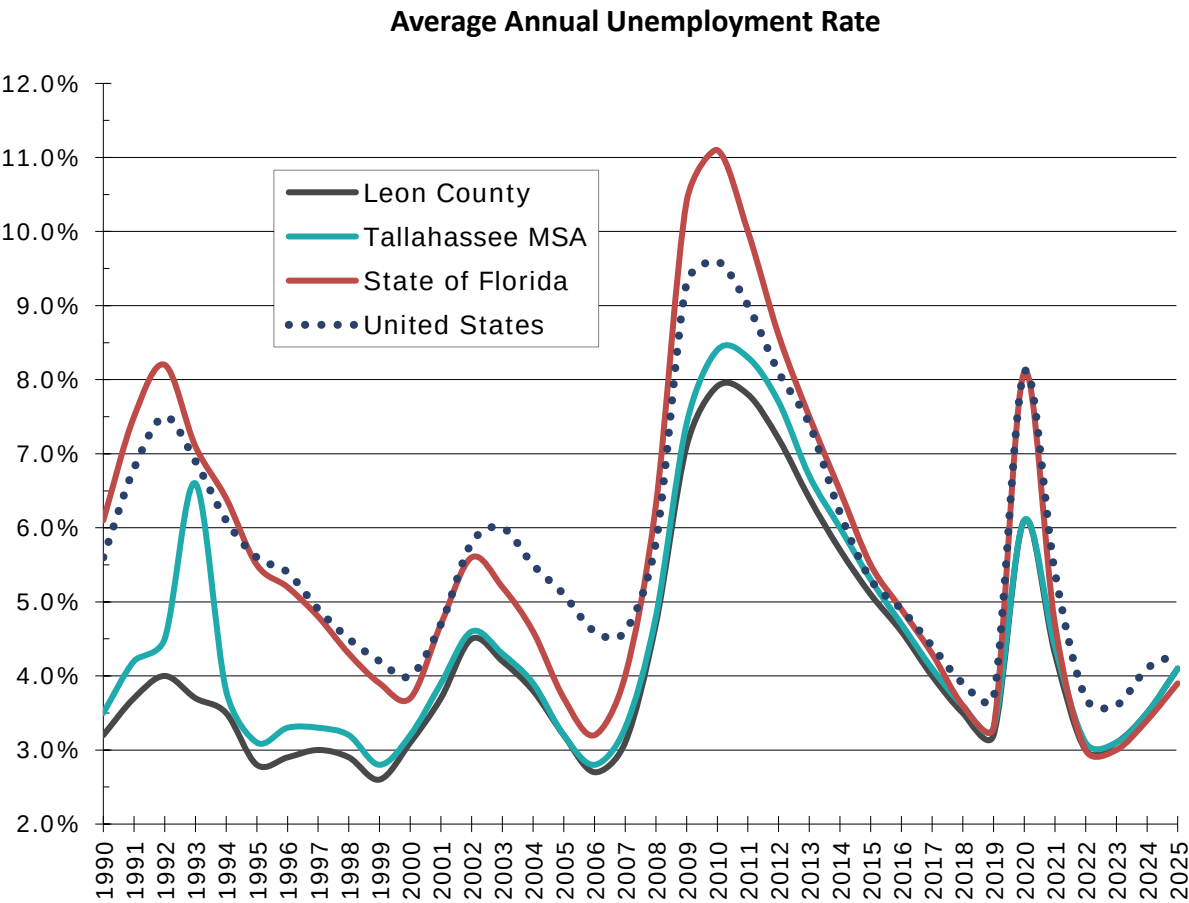
Trend: The average unemployment rate for the Tallahassee metro area generally fell from 2011 to 2019. In 2025, the average unemployment rate for the Tallahassee metro area was 4.1%, up from 3.5% in 2023 and 3.1% in 2022. The median annual average unemployment rate since 1990 is 4.0%. For the State of Florida, the average unemployment rate in 2025 was 3.9%, up from 3.4% in 2024 and 3.0% in 2023.

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%	9.0%
2012	7.2%	7.7%	8.6%	8.1%
2013	6.4%	6.7%	7.5%	7.4%
2014	5.7%	6.0%	6.5%	6.2%
2015	5.1%	5.3%	5.5%	5.3%
2016	4.6%	4.7%	4.9%	4.9%
2017	4.0%	4.1%	4.3%	4.4%
2018	3.5%	3.6%	3.6%	3.9%
2019	3.2%	3.3%	3.3%	3.7%
2020	6.1%	6.1%	8.1%	8.1%
2021	4.3%	4.4%	4.7%	5.4%
2022	3.0%	3.1%	3.0%	3.7%
2023	3.1%	3.1%	3.0%	3.6%
2024	3.5%	3.5%	3.4%	4.1%
2025	4.1%	4.1%	3.9%	4.3%

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



Workforce and Income
Average Annual Unemployment Rate



Source: Florida Commerce, Labor Market Information, Local Area Unemployment Statistics



Workforce and Income

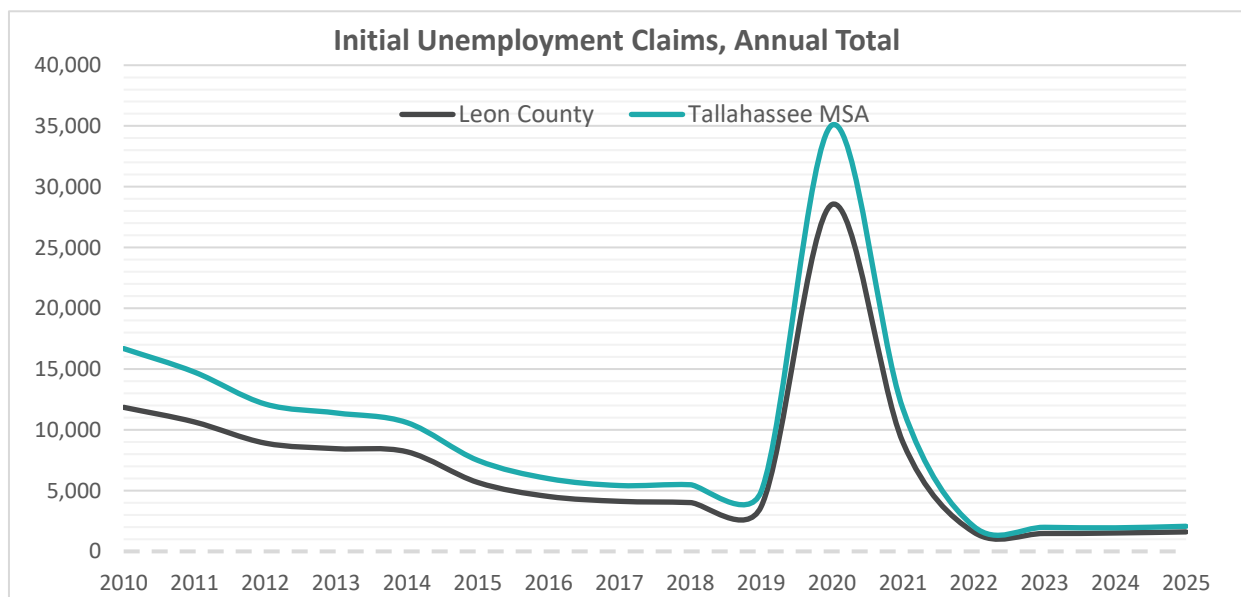
Initial Claims for Unemployment Compensation

Trend: Initial claims for unemployment compensation in the Tallahassee MSA declined from 2011 to 2019 but reached an all-time high of 35,073 in 2020, with 65% occurring between April and July. In 2021, initial claims subsided to 11,763 (59% occurring in January). There were 2,068 claims in 2022 (down 82% from 2021), 1,983 claims in 2023 (down 4% from 2022), 1,940 claims in 2024 (down 2% from 2023), and 2,067 claims in 2025 (up 6.5% from 2024).

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	10,648	14%	14,750	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%	7,490	-29%	424,955	-29%
2016	4,520	-20%	5,988	-20%	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	-8%	4,923	-10%	286,735	-11%
2020	28,545	676%	35,073	612%	2,772,379	867%
2021	9,000	-68%	11,763	-66%	552,170	-80%
2022	1,590	-82%	2,068	-82%	121,104	-78%
2023	1,476	-7%	1,983	-4%	133,345	10%
2024	1,517	3%	1,940	-2%	141,871	6%
2025	1,606	6%	2,067	7%	137,353	-3%

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

Source: Florida Dept. of Commerce, Workforce Statistics and Economic Research





Workforce and Income

Average Annual Employment/Wages

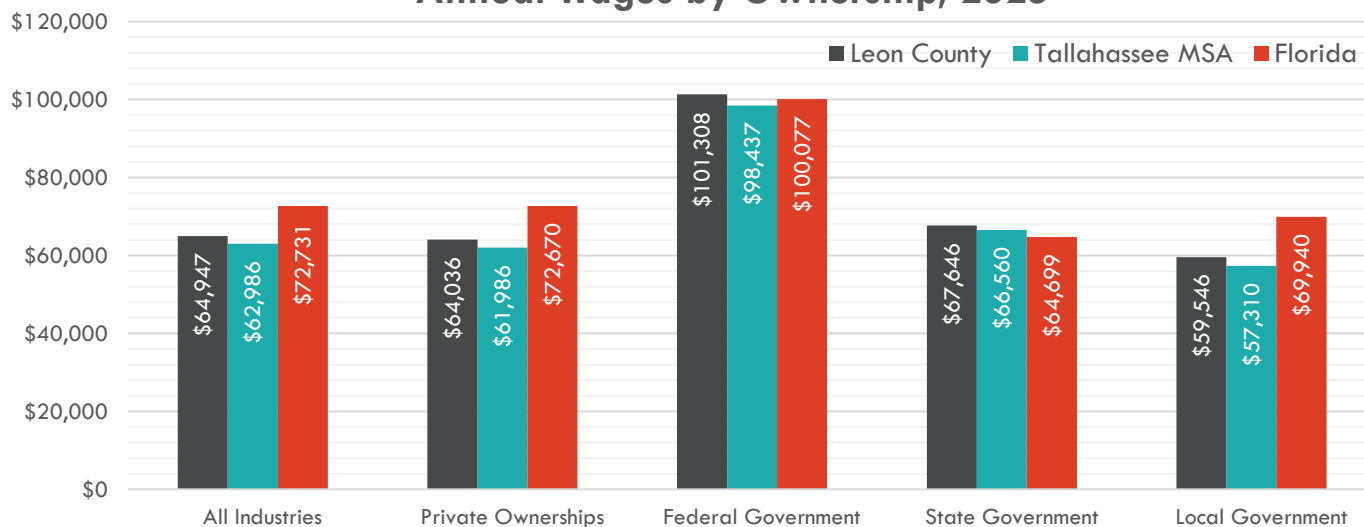
Annual Average Employment and Wages by Ownership

Trend: The average annual wage in Leon County in 2025 was \$64,947, 11% below the state average wage of \$72,731. The annual average state government wage was 5% higher in Leon County compared to the state average while the private sector wage in Leon County was 12% 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	10,868	165,332	\$1,249	\$64,947
Private Ownerships	10,631	115,540	\$1,231	\$64,036
Federal Government	42	1,927	\$1,948	\$101,308
State Government	174	36,251	\$1,301	\$67,646
Local Government	22	11,614	\$1,145	\$59,546
Tallahassee MSA				
All Industries	12,764	190,423	\$1,211	\$62,986
Private Ownerships	12,432	134,361	\$1,192	\$61,986
Federal Government	66	2,142	\$1,893	\$98,437
State Government	215	39,386	\$1,280	\$66,560
Local Government	51	14,535	\$1,102	\$57,310
Florida				
All Industries	867,766	9,921,226	\$1,399	\$72,731
Private Ownerships	861,914	8,821,117	\$1,398	\$72,670
Federal Government	1,990	158,669	\$1,925	\$100,077
State Government	2,205	222,878	\$1,244	\$64,699
Local Government	1,657	718,562	\$1,345	\$69,940

Source: Florida Commerce, Quarterly Census of Employment & Wages

Annual Wages by Ownership, 2025





Workforce and Income

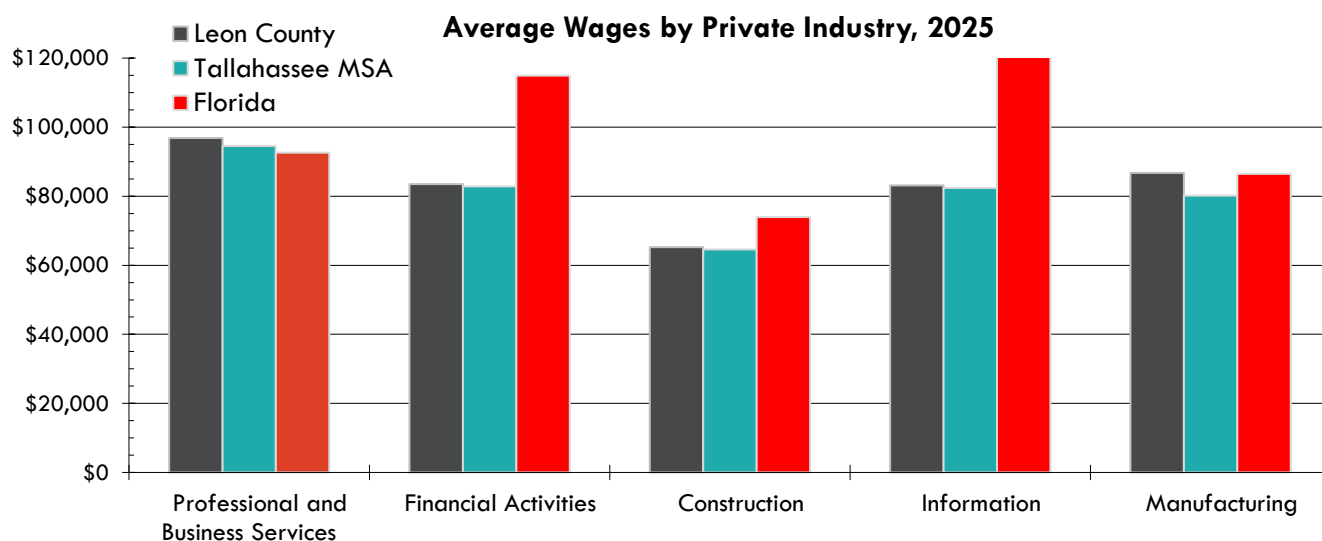
Average Annual Employment/Wages

Average Annual Employment & Wages, Select Private Industries

Trend: The average private sector annual wage in Leon County in 2025 was \$64,036, 12% below the state average private wage of \$72,670. By industry type, Leon County's private average annual wage ranged from 36% lower than the state average for the Information industry sector to 5% higher than the state average for Professional and Business Services.

Geography and Industry Type	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
<i>Leon County</i>	<i>10,631</i>	<i>115,540</i>	<i>\$64,036</i>
Professional and Business Services	3,235	23,668	\$96,862
Financial Activities	1,080	8,256	\$83,542
Construction	907	7,529	\$65,232
Information	256	2,483	\$83,097
Manufacturing	215	2,564	\$86,775
<i>Tallahassee MSA</i>	<i>12,432</i>	<i>134,361</i>	<i>\$61,986</i>
Professional and Business Services	3,515	25,485	\$94,489
Financial Activities	1,204	8,681	\$82,822
Construction	1,218	9,939	\$64,608
Information	278	2,603	\$82,359
Manufacturing	270	4,259	\$80,189
<i>Florida</i>	<i>861,914</i>	<i>8,821,117</i>	<i>\$72,670</i>
Professional and Business Services	223,115	1,624,964	\$92,605
Financial Activities	95,535	686,882	\$114,919
Construction	86,691	655,552	\$73,947
Information	19,063	152,885	\$130,350
Manufacturing	27,141	426,945	\$86,479

Source: Florida Commerce, Quarterly Census of Employment & Wages





Workforce and Income

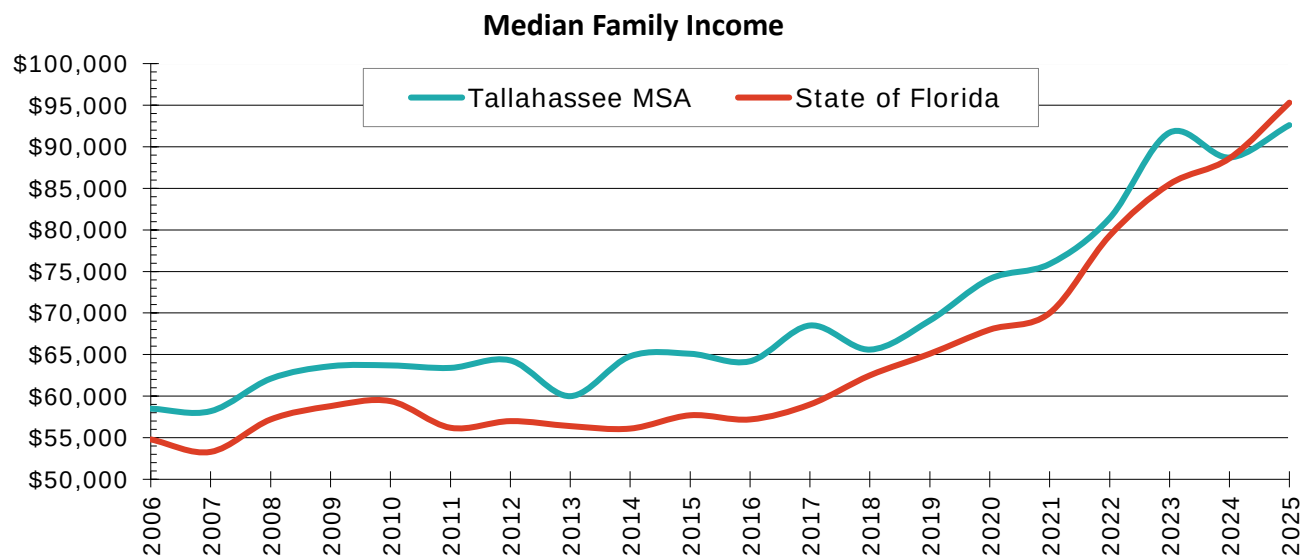
Median Family Income

Trend: Median family income for the Tallahassee metro area was \$92,600 in 2025, according to the Federal Financial Institutions Examination Council. The median family income in 2024 in Leon County was \$96,605 according to the Census Bureau's 2020-2024 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
2021	\$75,900	\$70,000	8.1% higher
2022	\$81,400	\$79,300	2.6% higher
2023	\$91,700	\$85,500	7.0% higher
2024	\$88,700	\$88,600	0.1% higher
2025	\$92,600	\$95,300	-2.9% lower

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.





Workforce and Income

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Median Family Income 2024, by jurisdiction

	Median Family Income	Estimated Number of Families
Florida	\$89,891	5,652,059
Tallahassee MSA*	\$90,486	87,405
Leon County	\$96,605	63,720
City of Tallahassee	\$87,462	37,227
Bradfordville CDP	\$142,776	5,567
Woodville CDP	\$54,877	970

*Note: Tallahassee MSA includes Leon, Gadsden, Jefferson and Wakulla Counties.
Source: U.S. Census Bureau, 2020-2024 5-Year American Community Survey, Table S1901



Workforce and Income

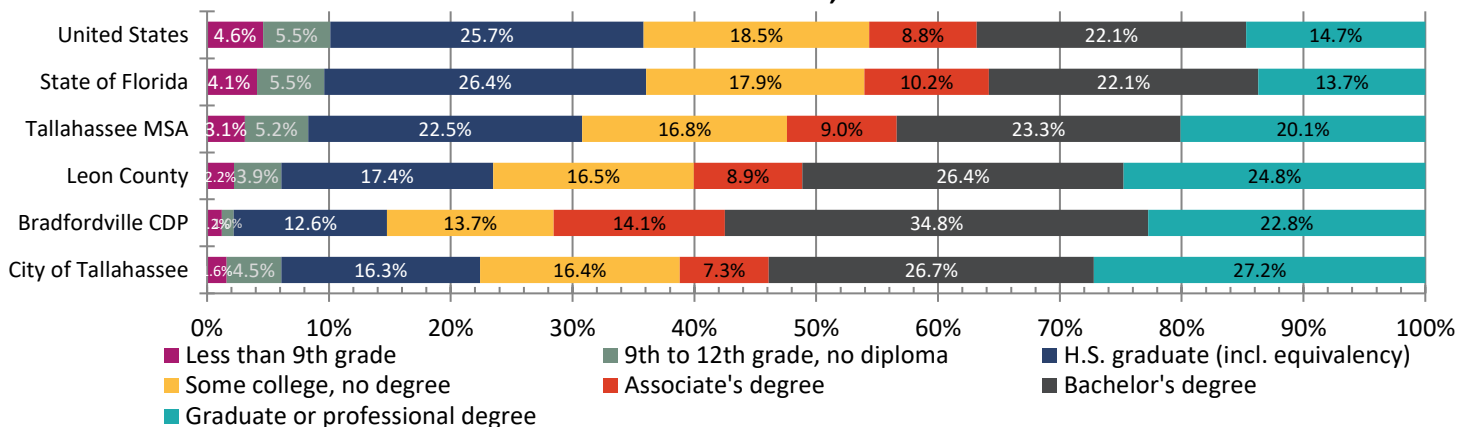
Population: Educational Attainment

Trend: The level of educational attainment has steadily increased in Leon County. As of 2024, 51.2% of Leon County residents 25 years and over had obtained a Bachelor's degree or higher, up from 41.7% in 2000. In comparison, 35.8% of State of Florida residents and 36.8% of US residents 25 years and over had obtained a Bachelor's degree or higher. Some 53.9% of Tallahassee city residents had a bachelor's degree or higher.

Educational Attainment Level as of 2024 *	City of Tallahassee	Bradfordville CDP	Leon County	Tallahassee MSA	State of Florida	United States
Less than 9th grade	1.6%	1.2%	2.2%	3.1%	4.1%	4.6%
9th to 12th grade, no diploma	4.5%	1.0%	3.9%	5.2%	5.5%	5.5%
H.S. graduate (incl. equivalency)	16.3%	12.6%	17.4%	22.5%	26.4%	25.7%
Some college, no degree	16.4%	13.7%	16.5%	16.8%	17.9%	18.5%
Associate's degree	7.3%	14.1%	8.9%	9.0%	10.2%	8.8%
Bachelor's degree	26.7%	34.8%	26.4%	23.3%	22.1%	22.1%
Graduate or professional degree	27.2%	22.8%	24.8%	20.1%	13.7%	14.7%

* Population 25 years and older.

Educational Attainment, 2024



Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2020-2024, Table S1501

Educational Attainment in Leon County, Population 25 years and over

	Percent		Percent	
	2000	2000	2024	2024
Less than 9th grade	4,218	3.1%	3,890	2.2%
9th to 12th grade, no diploma	10,749	7.8%	6,951	3.9%
H.S. graduate (incl. equivalency)	25,963	18.9%	31,272	17.4%
Some college, no degree	27,956	20.3%	29,767	16.5%
Associate's degree	11,255	8.2%	16,024	8.9%
Bachelor's degree	33,040	24.0%	47,559	26.4%
Graduate or professional degree	24,356	17.7%	44,632	24.8%
Total	137,537		180,095	

Source: U.S. Department of Commerce, Bureau of the Census, 2000, American Community Survey, 2020-2024



Workforce and Income

Employment by Industry:

Tallahassee MSA Non-Agricultural Employment by Industry, 2020-2025

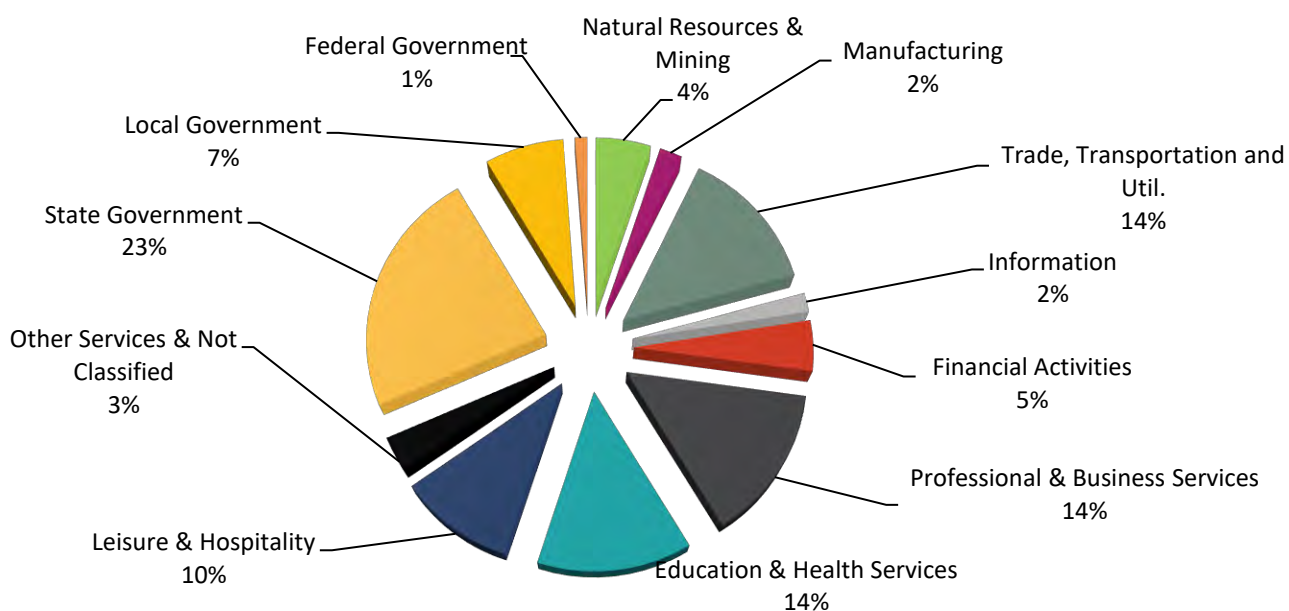
Trend: Non-agricultural jobs increased by about 1,900 in 2025 compared to 2024, with the largest gains in Professional and Business Services (1,100), Financial Activities (500), Education & Health Services (200), and Mining, Logging, and Construction (200). Job losses in 2025 included Information (-400), Other Services (-100), and Federal Government (-100).

Industry Type	2020	2021	2022	2023	2024	2025	Avg. Ann. Rate Change 2020-2025
Mining, Logging & Construction	8,400	8,300	8,900	9,600	10,200	10,400	4.3%
Manufacturing	3,400	3,800	4,000	4,100	4,200	4,300	4.7%
Trade, Transportation and Util.	23,600	24,700	25,400	26,000	27,100	27,200	2.8%
Information	3,200	3,600	4,000	3,800	3,500	3,100	-0.6%
Financial Activities	7,600	8,000	8,500	9,000	9,400	9,900	5.3%
Professional & Business Services	23,000	25,300	27,100	27,300	28,500	29,600	5.0%
Education & Health Services	24,300	24,600	25,600	26,900	27,100	27,300	2.3%
Leisure & Hospitality	16,800	18,800	20,400	20,700	20,500	20,500	4.0%
Other Services & Not Classified	6,500	6,100	6,500	6,400	6,500	6,400	-0.3%
State Government	44,400	44,100	43,600	44,600	46,200	46,200	0.8%
Local Government	14,200	13,900	14,200	14,500	14,700	14,900	1.0%
Federal Government	2,200	2,100	2,200	2,300	2,300	2,200	0.0%
Total	177,500	183,100	190,400	195,300	200,100	202,000	2.6%

Note: Estimates made to nearest hundred; columns may not add to totals due to rounding.

Source: U.S. Department of Labor, Bureau of Labor Statistics, Current Employment Statistics Program. Prepared by: Florida Commerce, Bureau of Labor Market Statistics

Non-Agricultural Employment by Industry, Tallahassee MSA (2025)





Workforce and Income

Employment

State Government Employees in Tallahassee MSA

Trend: The proportion of State government employment (e.g., State of Florida, FSU, FAMU, TSC) to total employment for the Tallahassee MSA has steadily declined over the past three decades: 29.7% in the 1990s, 26.9% in the 2000s, and 25.5% in the 2010s. Since 1990, annual average State employment has only fluctuated between 39,300 and 46,200, with a median value of 44,500. In 2025, the annual average was 46,200. 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 35 years.

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	40,200	0.8%	90,800	2.4%	30.7%	-0.3
1993	41,200	2.5%	94,600	4.2%	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%	123,200	-0.3%	26.4%	-0.4
2012	42,800	-3.4%	122,700	-0.4%	25.9%	-0.6
2013	42,800	0.0%	123,600	0.7%	25.7%	-0.1
2014	43,900	2.6%	126,300	2.2%	25.8%	0.1
2015	43,500	-0.9%	127,700	1.1%	25.4%	-0.4
2016	43,500	0.0%	132,300	3.6%	24.7%	-0.7
2017	44,500	2.3%	133,600	1.0%	25.0%	0.2
2018	44,800	0.7%	136,900	2.5%	24.7%	-0.3
2019	45,200	0.9%	139,300	1.8%	24.5%	-0.2
2020	44,400	-1.8%	133,100	-4.5%	25.0%	0.5
2021	44,100	-0.7%	139,000	4.4%	24.1%	-0.9
2022	43,600	-1.1%	146,800	5.6%	22.9%	-1.2
2023	44,600	2.3%	150,700	2.7%	22.8%	-0.1
2024	46,200	3.6%	153,900	2.1%	23.1%	0.3
2025	46,200	0.0%	155,800	1.2%	22.9%	-0.2

Source: US Bureau of Labor Statistics, Federal Bank of St Louis
Tallahassee-Leon County
Office of Economic Vitality

Rev. 4/26



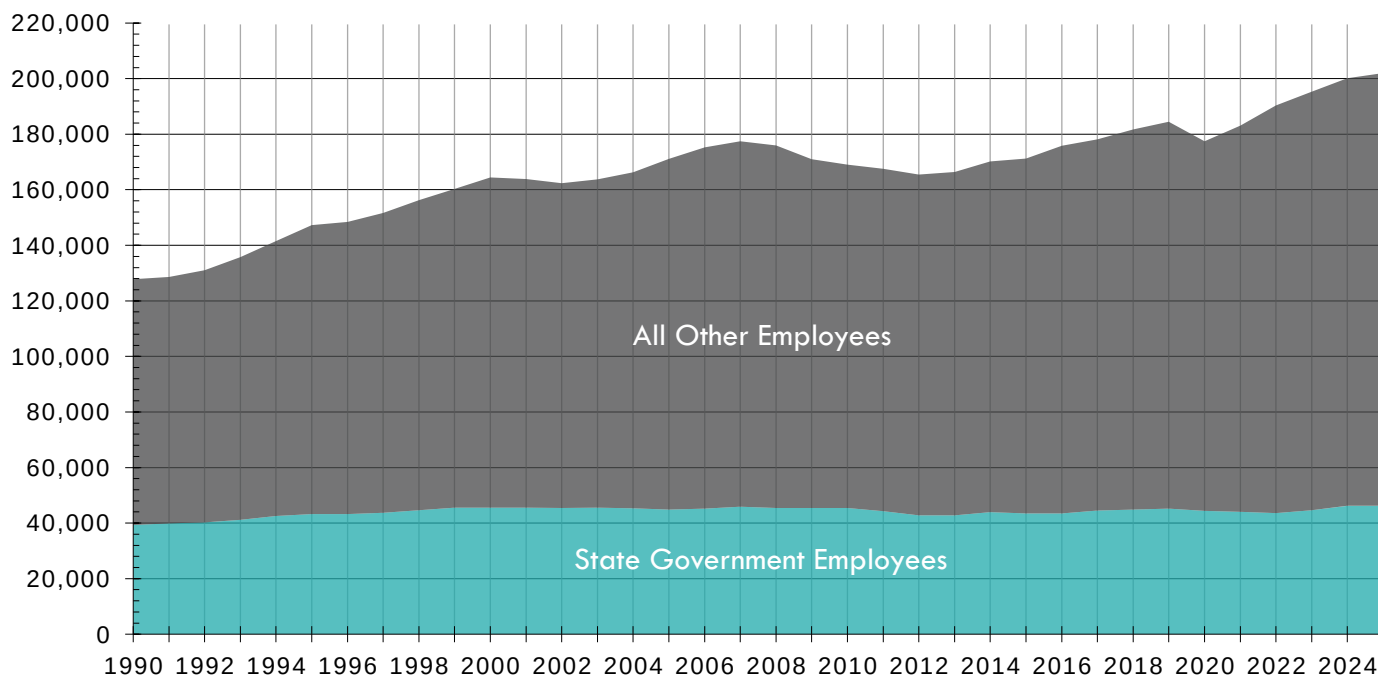
Workforce and Income

Employment

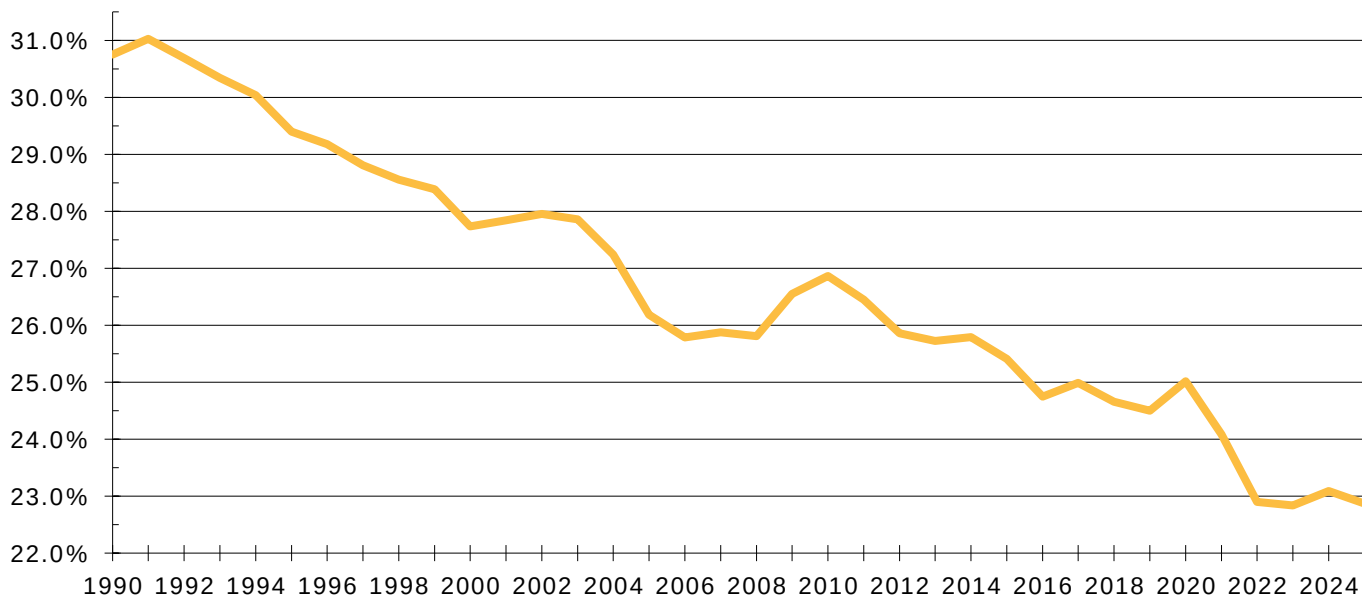
State Government Employees in Tallahassee MSA

Trend: The proportion of State government employment (e.g., State of Florida, FSU, FAMU, TSC) to total employment for the Tallahassee MSA has steadily declined over the past three decades: 29.7% in the 1990s, 26.9% in the 2000s, and 25.5% in the 2010s. Since 1990, annual average State employment has only fluctuated between 39,300 and 46,200, with a median value of 44,500. In 2025, the annual average was 46,200. 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 35 years.

Total Employment, Tallahassee MSA



State Government Employees as Percent of Total Employees in Tallahassee MSA





Workforce and Income

Projected Employment by Occupation:

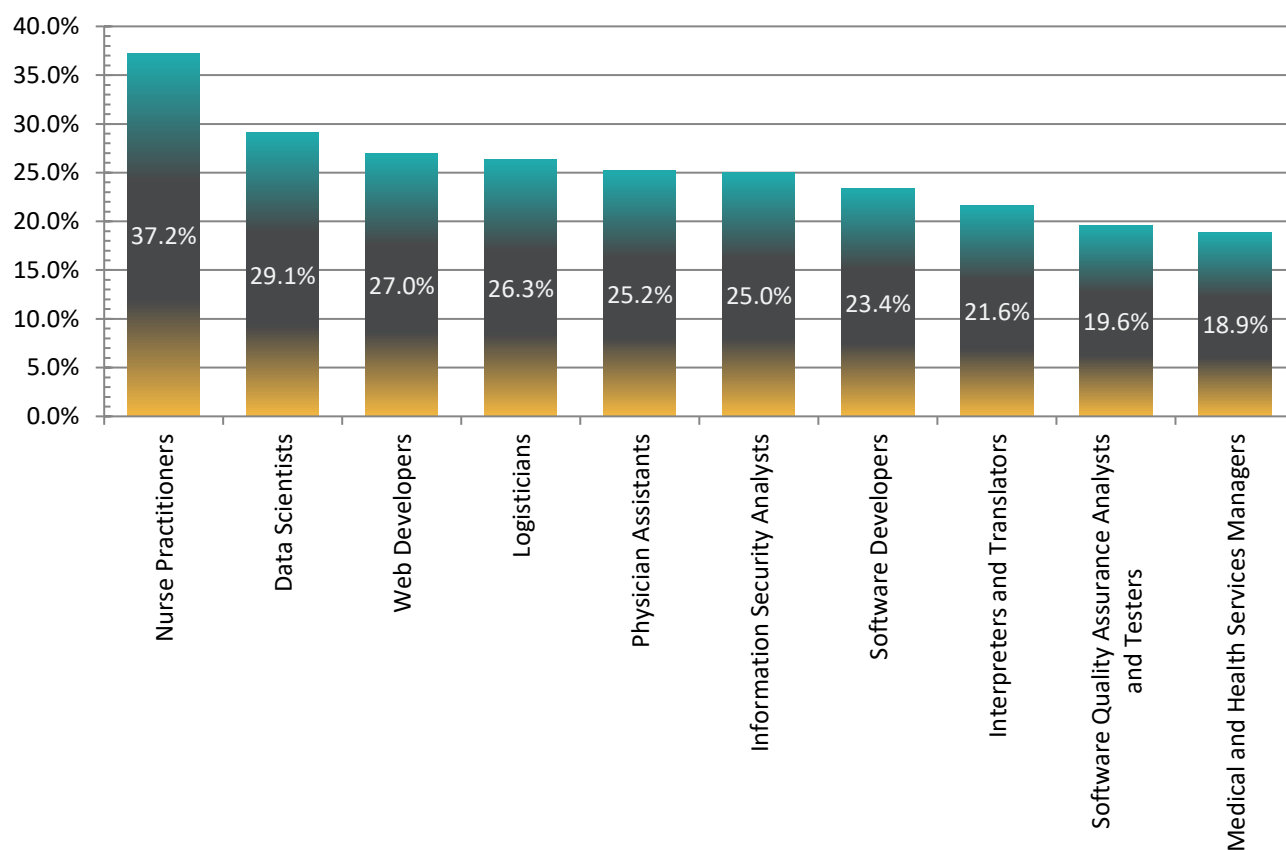
Fastest Growing Occupations in Capital Region (2025-2033)

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

Industry	2025 Employment	2033 Projected Employment	Total Employment Change	Percent Growth
Nurse Practitioners	487	668	181	37.2%
Data Scientists	230	297	67	29.1%
Web Developers	141	179	38	27.0%
Logisticians	133	168	35	26.3%
Physician Assistants	234	293	59	25.2%
Information Security Analysts	264	330	66	25.0%
Software Developers	1,754	2,165	411	23.4%
Interpreters and Translators	125	152	27	21.6%
Software Quality Assurance Analysts and Testers	199	238	39	19.6%
Medical and Health Services Managers	1,086	1,291	205	18.9%

Source: Florida Department of Commerce, Labor Market Information, Florida Employment Projections

Fastest Growing Occupations, Percent Growth 2025-2033





Workforce and Income

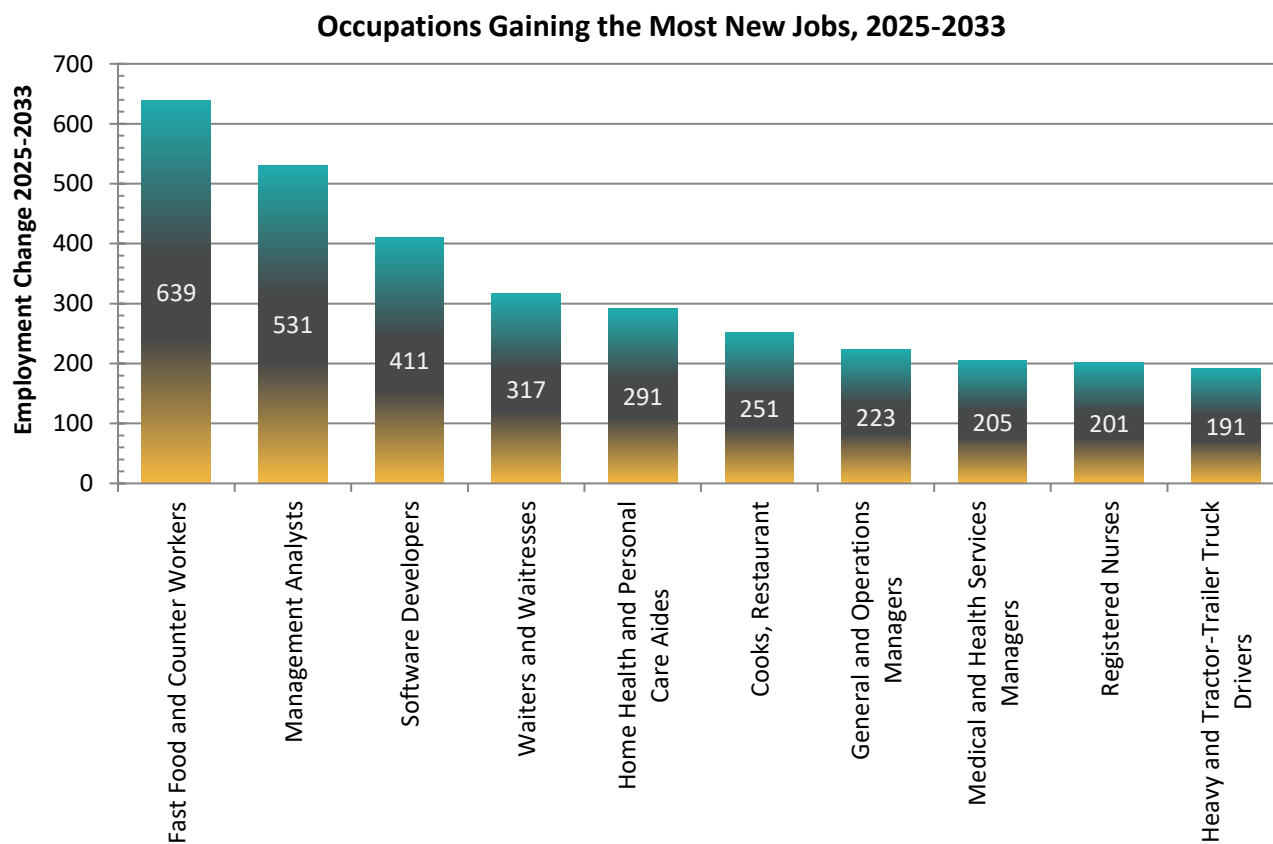
Projected Employment by Occupation:

Occupations Gaining the Most New Jobs (2025-2033)

Trend: By total employment change, Fast Food Workers and Management Analysts are the occupations projected to add the most jobs in the Capital Region (Jefferson, Gadsden, Leon, and Wakulla counties) by 2033.

Industry	2025 Employment	2033 Projected Employment	Total Employment Change	Percent Growth
Fast Food and Counter Workers	5,463	6,102	639	11.7%
Management Analysts	7,104	7,635	531	7.5%
Software Developers	1,754	2,165	411	23.4%
Waiters and Waitresses	2,663	2,980	317	11.9%
Home Health and Personal Care Aides	2,150	2,441	291	13.5%
Cooks, Restaurant	1,818	2,069	251	13.8%
General and Operations Managers	4,670	4,893	223	4.8%
Medical and Health Services Managers	1,086	1,291	205	18.9%
Registered Nurses	3,852	4,053	201	5.2%
Heavy and Tractor-Trailer Truck Drivers	1,405	1,596	191	13.6%

Source: Florida Department of Commerce, Labor Market Information, Florida Employment Projections





Workforce and Income

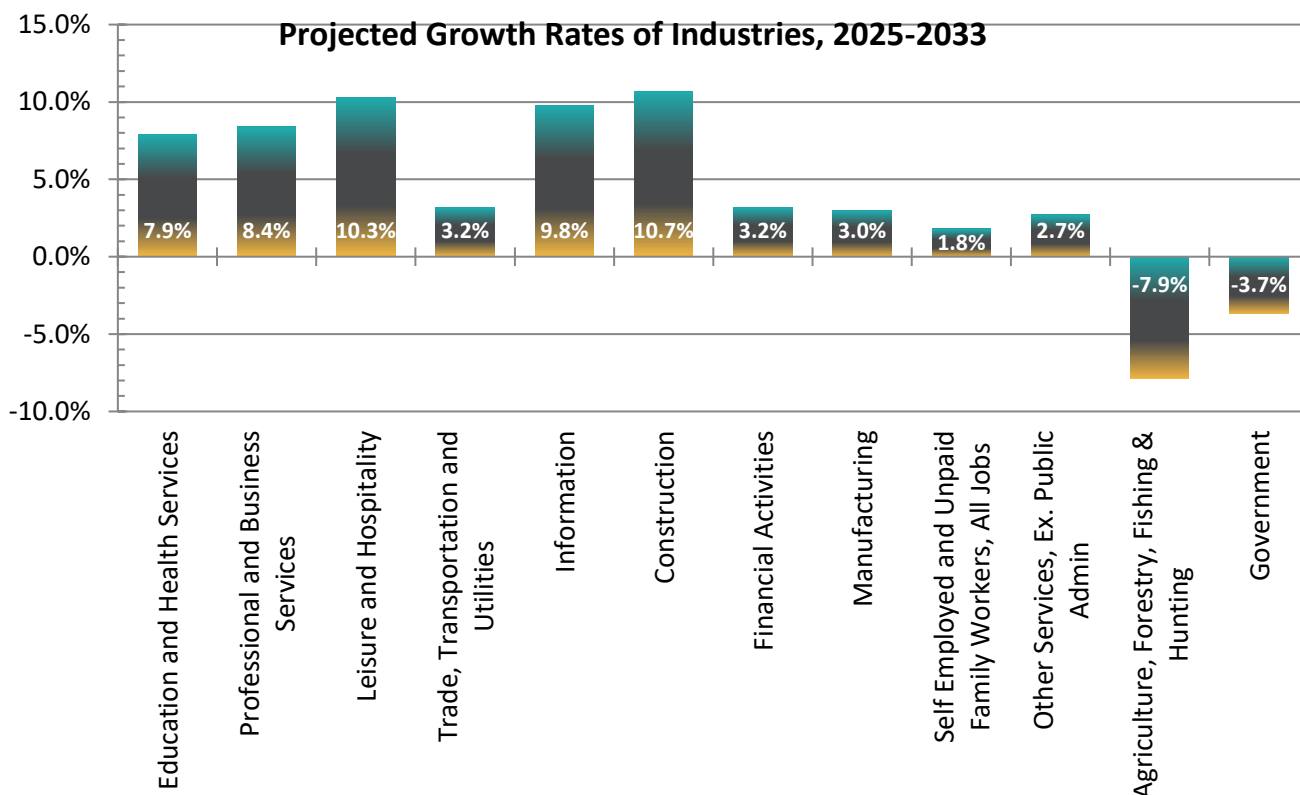
Projected Employment by Industry:

Industries Growing the Most Jobs in Capital Region

Trend: In the Capital Region (Gadsden, Jefferson, Leon, and Wakulla counties), Education and Health Services, Professional and Business Services, and Leisure and Hospitality are projected to create the most jobs between 2025 and 2033.

Industry	2025 Employment	2033 Projected Employment	Total Employment Change	Percent Growth
Education and Health Services	46,851	50,565	3,714	7.9%
Professional and Business Services	27,623	29,951	2,328	8.4%
Leisure and Hospitality	20,838	22,979	2,141	10.3%
Trade, Transportation and Utilities	26,682	27,549	867	3.2%
Information	4,212	4,623	411	9.8%
Construction	9,979	11,048	1,069	10.7%
Financial Activities	9,306	9,606	300	3.2%
Manufacturing	4,306	4,436	130	3.0%
Self Employed and Unpaid Family Workers, All Jobs	13,966	14,222	256	1.8%
Other Services, Ex. Public Admin	7,839	8,053	214	2.7%
Agriculture, Forestry, Fishing & Hunting	491	452	-39	-7.9%
Government	43,598	41,965	-1,633	-3.7%
Total All Industries	220,559	230,916	10,357	7.0 %

Source: Florida Department of Commerce, Labor Market Information, Florida Employment Projections





Workforce and Income

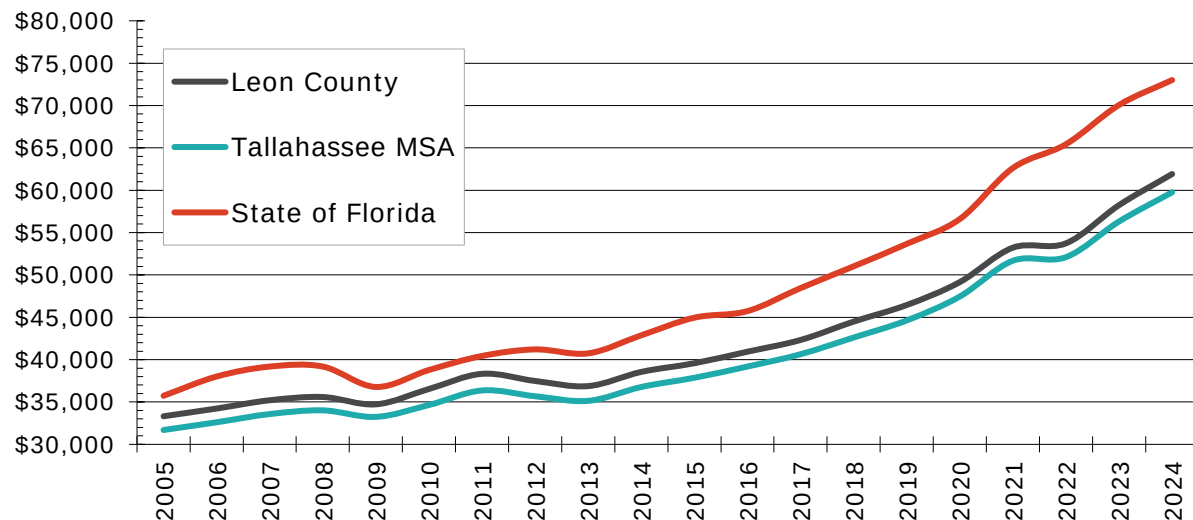
Per Capita Personal Income

Trend: Per capita personal income increased 6.3% in Leon County in 2024 and was 85% 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	\$33,320	5.0%	\$31,695	4.9%	\$35,736	6.9%
2006	\$34,230	2.7%	\$32,608	2.9%	\$38,009	6.4%
2007	\$35,206	2.9%	\$33,577	3.0%	\$39,184	3.1%
2008	\$35,589	1.1%	\$34,013	1.3%	\$39,185	0.0%
2009	\$34,725	-2.4%	\$33,246	-2.3%	\$36,777	-6.1%
2010	\$36,540	5.2%	\$34,649	4.2%	\$38,779	5.4%
2011	\$38,328	4.9%	\$36,364	5.0%	\$40,437	4.3%
2012	\$37,482	-2.2%	\$35,679	-1.9%	\$41,211	1.9%
2013	\$36,879	-1.6%	\$35,137	-1.5%	\$40,743	-1.1%
2014	\$38,553	4.5%	\$36,776	4.7%	\$42,877	5.2%
2015	\$39,577	2.7%	\$37,862	3.0%	\$44,957	4.9%
2016	\$40,939	3.4%	\$39,186	3.5%	\$45,730	1.7%
2017	\$42,321	3.4%	\$40,639	3.7%	\$48,447	5.9%
2018	\$44,491	5.1%	\$42,611	4.9%	\$51,015	5.3%
2019	\$46,447	4.4%	\$44,630	4.7%	\$53,666	5.2%
2020	\$49,154	5.8%	\$47,450	6.3%	\$56,597	5.5%
2021	\$53,219	8.3%	\$51,677	8.9%	\$62,617	10.6%
2022	\$53,733	1.0%	\$52,097	0.8%	\$65,429	4.5%
2023	\$58,237	8.4%	\$56,308	8.1%	\$70,057	7.1%
2024	\$61,912	6.3%	\$59,753	6.1%	\$73,006	4.2%

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

Per Capita Personal Income, 2005-2024

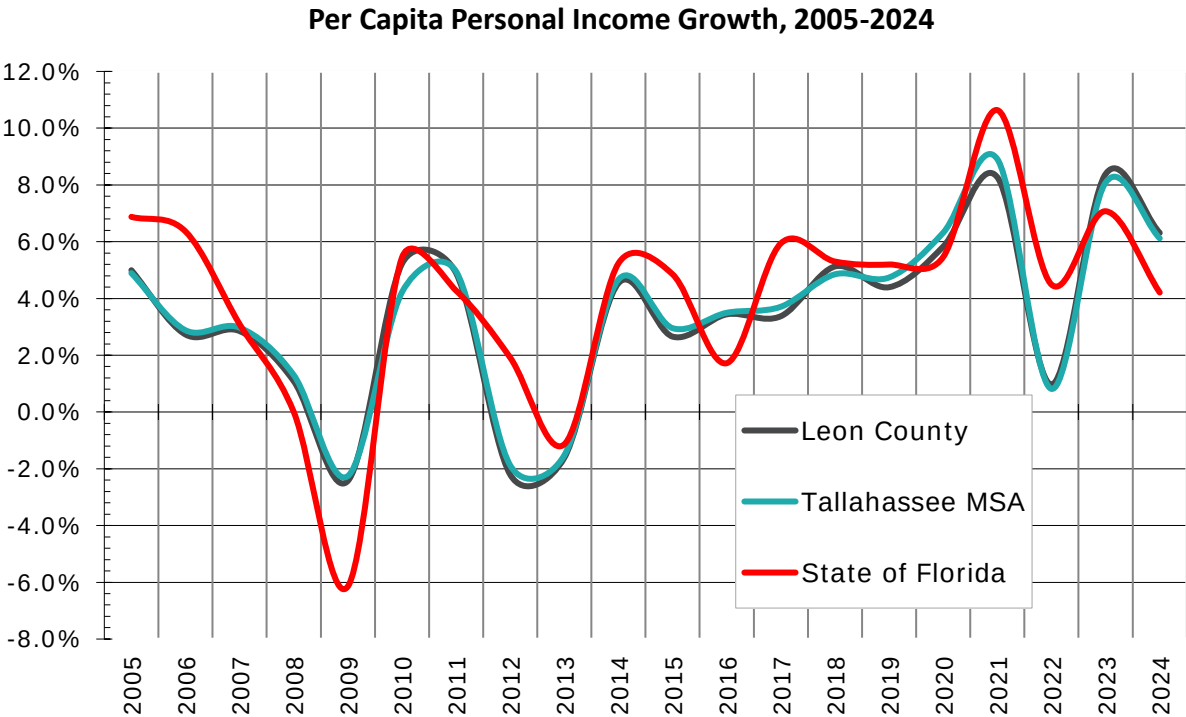




Workforce and Income

Per Capita Personal Income

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Workforce and Income

Graduate Retention

Recent Graduates Employed in Leon County by the next Fall

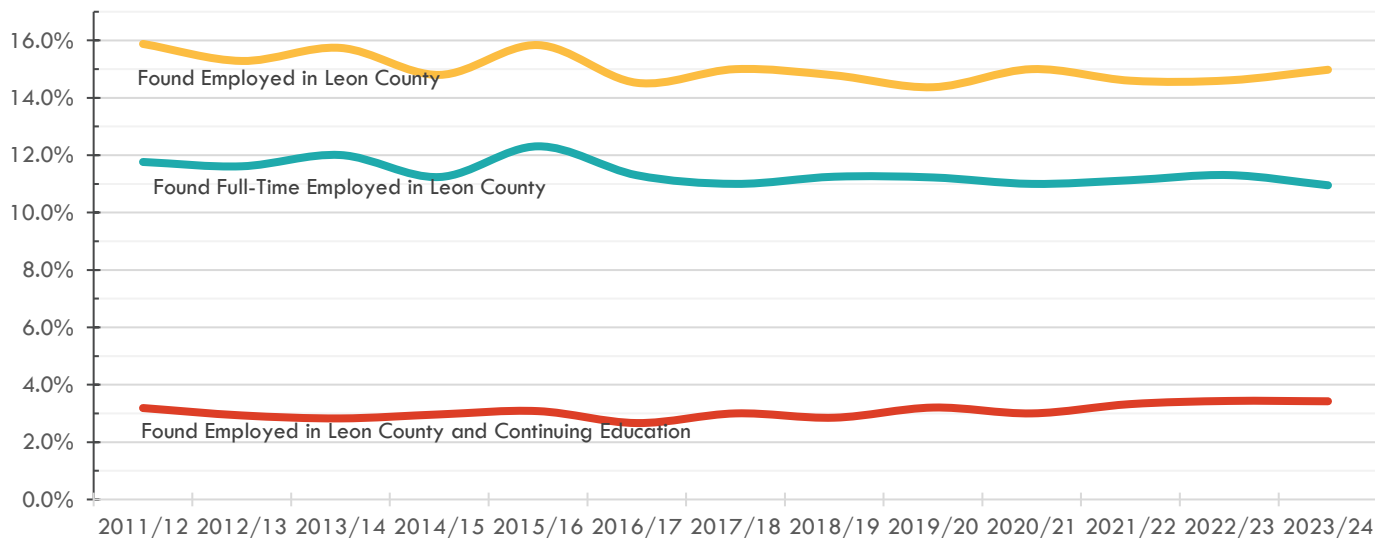
Trend: "Graduate Retention" is not easy to define. Higher education enrollment is driven by State, national, and international recruitment rather than by local labor market needs. The number of graduates and the skills they graduate with may not necessarily match the needs of Tallahassee's labor market. In the 2023/24 academic year, 15,048 graduates completed degrees at FSU and FAMU. Graduate retention was 15.0%, with 11.0% full-time employed in Leon County by Fall 2024. The 11.0% of graduates found full-time employed in Leon County the following year is similar to the proportion of incoming university students from Leon County (11.2%). This 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%
2019/20	13,828	1,987	14.4%	1,552	11.2%	443	3.2%	1,544	11.2%
2020/21	13,833	2,063	15.0%	1,542	11.0%	462	3.0%	1,601	12.0%
2021/22	14,530	2,121	14.6%	1,617	11.1%	483	3.3%	1,638	11.3%
2022/23	15,141	2,212	14.6%	1,712	11.3%	520	3.4%	1,692	11.2%
2023/24	15,048	2,254	15.0%	1,648	11.0%	515	3.4%	1,739	11.6%

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





Workforce and Income

Graduate Retention

Recent TSC & Lively 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. In the 2023/24 academic year, 3,092 graduates completed degrees at TSC and 1,137 at Lively. Graduate retention was 33.6% for TSC and 25.3% for Lively, with 21% of TSC recent graduates and 13% of Lively recent graduates full-time employed in Leon County by Fall 2024.

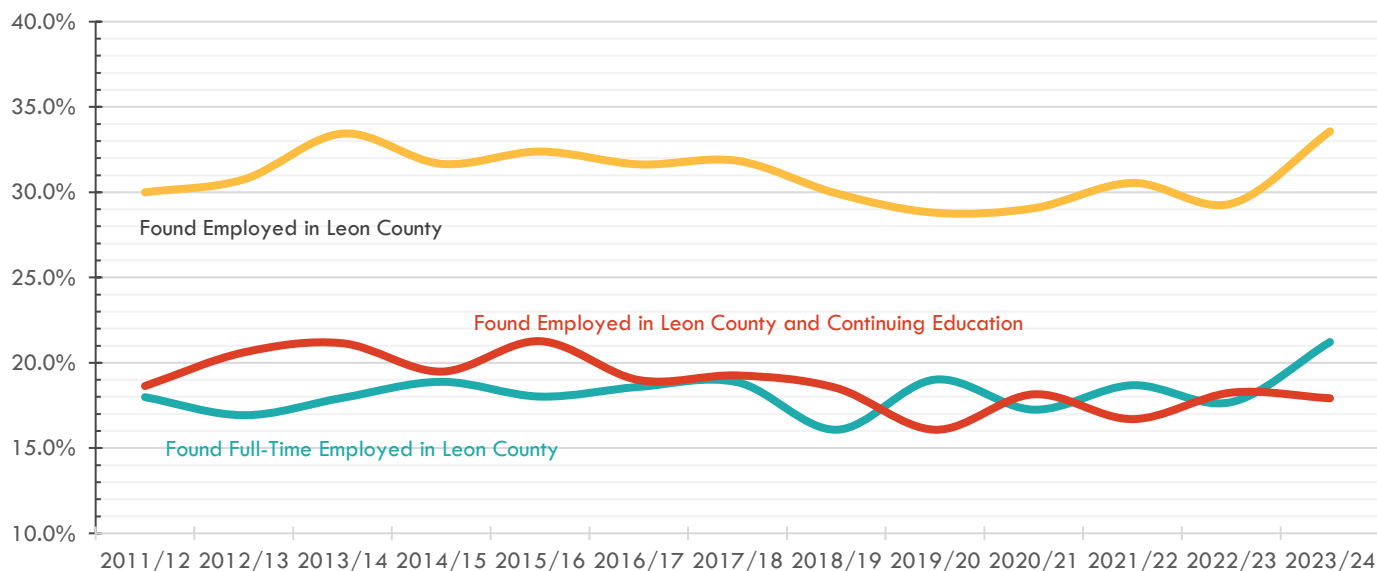
Tallahassee State College

Academic Year	TSC 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	3,681	1,104	30.0%	662	18.0%	686	18.6%	418	11.4%
2012/13	3,096	952	30.7%	524	16.9%	638	20.6%	314	10.1%
2013/14	2,937	982	33.4%	527	17.9%	621	21.1%	361	12.3%
2014/15	3,013	954	31.7%	569	18.9%	587	19.5%	367	12.2%
2015/16	2,986	967	32.4%	538	18.0%	635	21.3%	332	11.1%
2016/17	2,997	948	31.6%	557	18.6%	569	19.0%	379	12.6%
2017/18	3,012	959	31.8%	568	18.9%	580	19.3%	379	12.6%
2018/19	2,980	892	29.9%	479	16.1%	552	18.5%	340	11.4%
2019/20	3,403	980	28.8%	647	19.0%	547	16.1%	433	12.7%
2020/21	2,887	839	29.1%	498	17.2%	524	18.2%	315	10.9%
2021/22	2,917	891	30.5%	545	18.7%	487	16.7%	404	13.8%
2022/23	2,888	847	29.3%	511	17.7%	527	18.2%	320	11.1%
2023/24	3,092	1,038	33.6%	656	21.2%	554	17.9%	484	15.7%

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)

TSC Recent Completers Employed in Leon County by the next Fall





Workforce and Income

Graduate Retention

Recent TSC & Lively 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. In the 2023/24 academic year, 3,092 graduates completed degrees at TSC and 1,137 at Lively. Graduate retention was 33.6% for TSC and 25.3% for Lively, with 21% of TSC recent graduates and 13% of Lively recent graduates full-time employed in Leon County by Fall 2024.

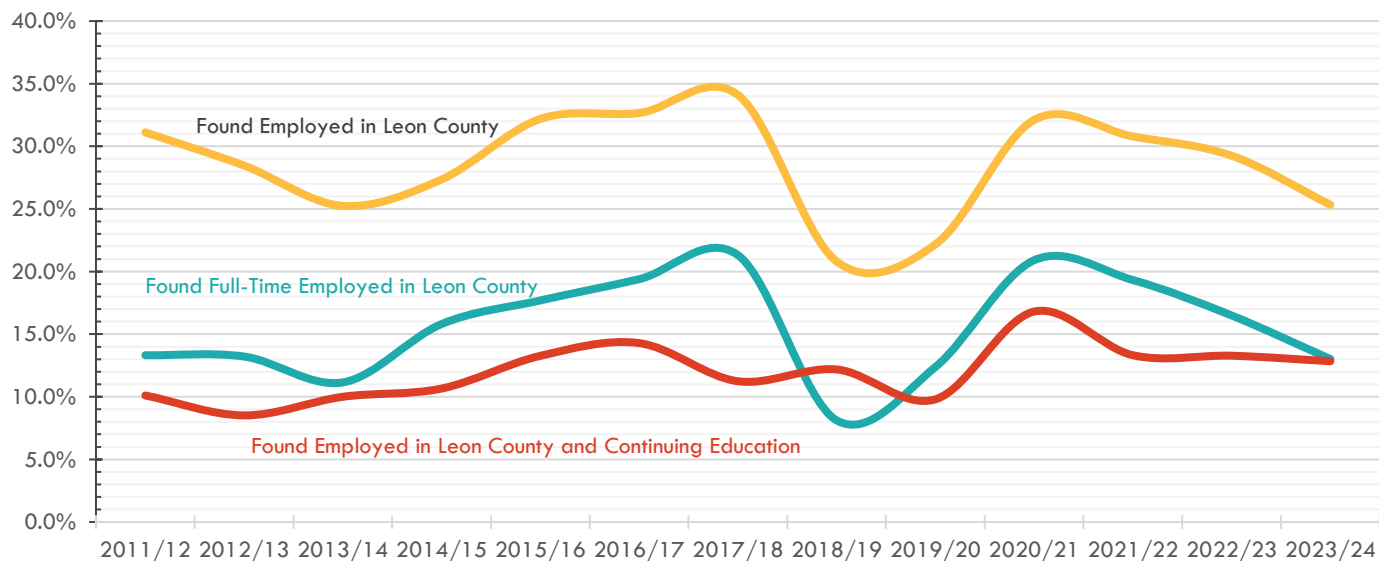
Lively Technical College

Academic Year	Lively 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	871	271	31.1%	116	13.3%	88	10.1%	183	21.0%
2012/13	787	224	28.5%	104	13.2%	67	8.5%	157	19.9%
2013/14	610	154	25.2%	68	11.1%	61	10.0%	93	15.2%
2014/15	563	154	27.4%	89	15.8%	60	10.7%	94	16.7%
2015/16	407	131	32.2%	72	17.7%	54	13.3%	77	18.9%
2016/17	392	128	32.7%	76	19.4%	56	14.3%	72	18.4%
2017/18	258	88	34.1%	55	21.3%	29	11.2%	59	22.9%
2018/19	197	41	20.8%	16	8.1%	24	12.2%	17	8.6%
2019/20	194	43	22.2%	24	12.4%	19	9.8%	24	12.4%
2020/21	732	235	32.1%	153	20.9%	123	16.8%	112	15.3%
2021/22	916	282	30.8%	177	19.3%	122	13.3%	160	17.5%
2022/23	964	282	29.3%	159	16.5%	128	13.3%	154	16.0%
2023/24	1,137	288	25.3%	148	13.0%	146	12.8%	142	12.5%

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)

Lively Recent Completers Employed in Leon County by the next Fall





Workforce and Income

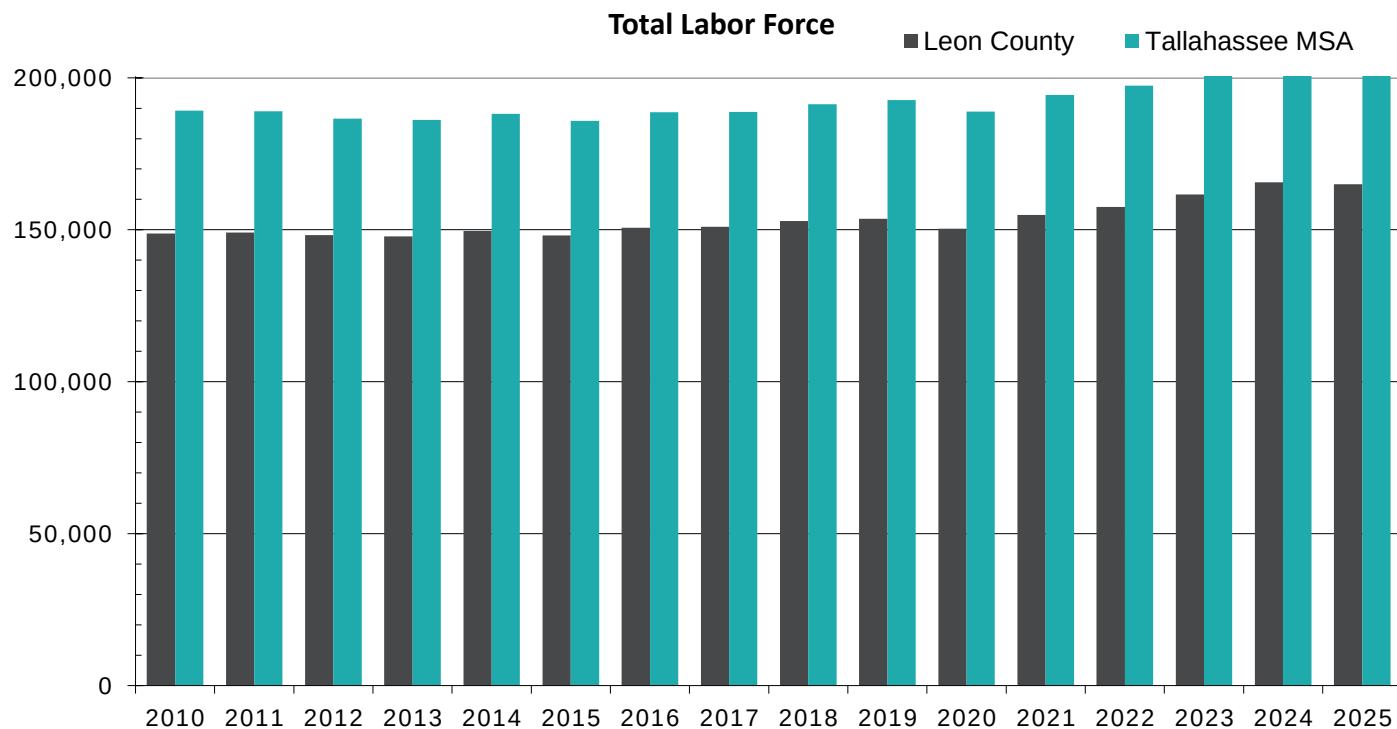
Labor Force

Trend: The Tallahassee MSA's labor force grew 9.8% between 2020 to 2025, with an average annual growth rate of around 1.2% per year.

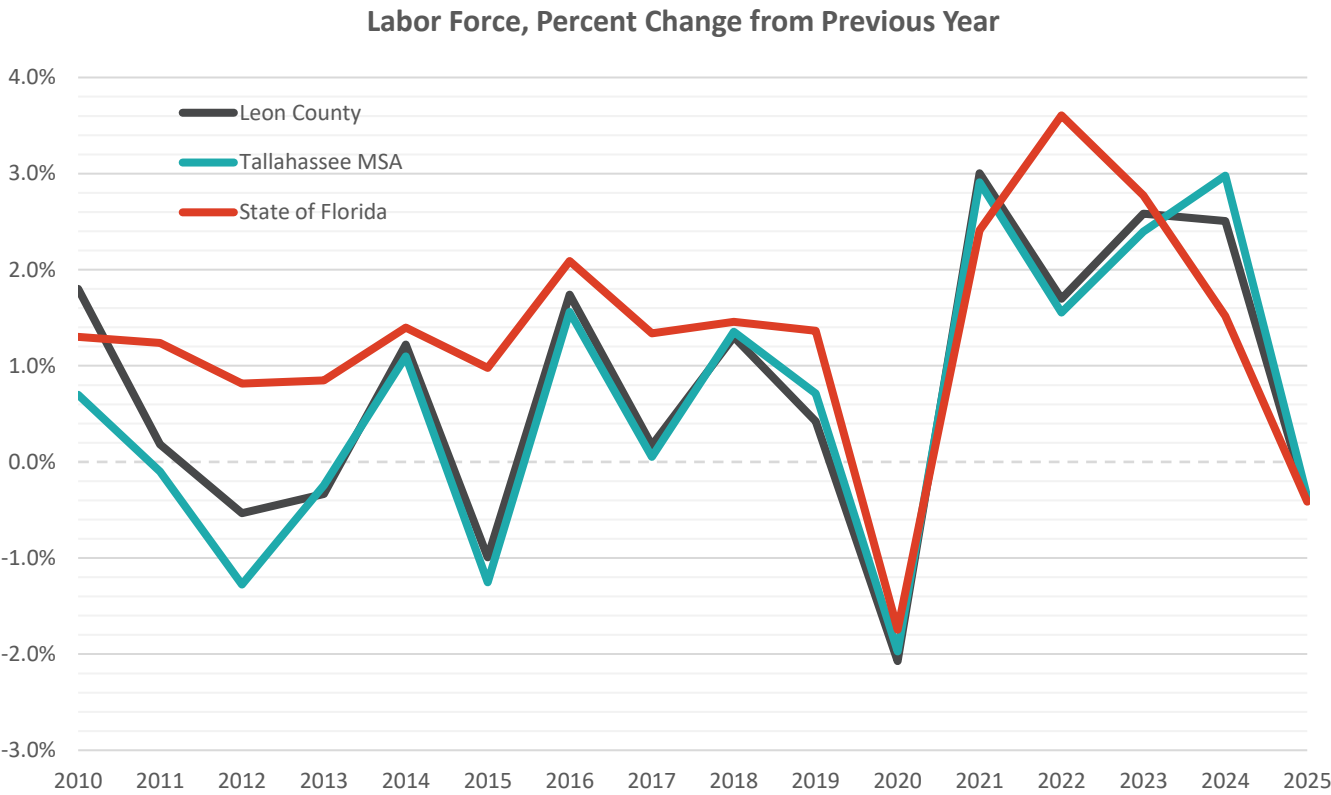
Year	Leon County		Tallahassee MSA		State of Florida	
	Labor Force	Change from Previous Year	Labor Force	Change from Previous Year	Labor Force	Change from Previous Year
2010	148,825	1.8%	189,189	0.7%	9,147,100	1.3%
2011	149,095	0.2%	188,997	-0.1%	9,260,300	1.2%
2012	148,300	-0.5%	186,587	-1.3%	9,335,700	0.8%
2013	147,807	-0.3%	186,133	-0.2%	9,414,800	0.8%
2014	149,610	1.2%	188,174	1.1%	9,546,400	1.4%
2015	148,125	-1.0%	185,817	-1.3%	9,639,800	1.0%
2016	150,703	1.7%	188,717	1.6%	9,841,400	2.1%
2017	150,964	0.2%	188,814	0.1%	9,972,900	1.3%
2018	152,930	1.3%	191,371	1.4%	10,118,300	1.5%
2019	153,574	0.4%	192,730	0.7%	10,256,300	1.4%
2020	150,391	-2.1%	188,930	-2.0%	10,077,200	-1.7%
2021	154,908	3.0%	194,426	2.9%	10,320,200	2.4%
2022	157,537	1.7%	197,450	1.6%	10,692,300	3.6%
2023	161,608	2.6%	202,182	2.4%	10,988,600	2.8%
2024	165,661	2.5%	208,204	3.0%	11,155,300	1.5%
2025	165,003	-0.4%	207,445	-0.4%	11,109,200	-0.4%

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

Source: Florida Commerce, Labor Market Information, Local Area Unemployment Statistics



Trend: The Tallahassee MSA's labor force grew 9.8% between 2020 to 2025, with an average annual growth rate of around 1.2% per year.





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	6,681	6,495	7,900	7,200	186
1999	7,666	6,682	7,800	7,200	984
2000	8,438	8,287	7,700	7,200	152
2001	8,354	7,635	7,700	7,100	718
2002	7,763	6,522	7,500	7,100	1,241
2003	7,174	7,160	7,400	7,000	14
2004	7,598	7,157	7,200	6,900	441
2005	8,040	6,417	7,000	6,800	1,623
2006	7,124	6,642	6,800	6,600	481
2007	6,541	7,156	6,500	6,500	-615
2008	6,010	7,408	6,300	6,300	-1,398
2009	5,005	6,305	6,100	6,100	-1,300
2010	5,606	5,346	6,000	5,900	260
2011	5,432	5,145	5,900	5,800	288
2012	5,815	5,500	5,900	5,600	315
2013	5,573	5,012	5,900	5,600	561
2014	5,932	5,279	6,000	5,500	653
2015	5,686	5,136	6,100	5,500	550
2016	6,424	5,494	6,200	5,600	930
2017	6,083	5,621	6,400	5,700	462
2018	7,112	5,706	6,600	5,800	1,405
2019	6,906	5,994	6,800	5,900	912
2020	6,878	7,350	6,900	6,100	-472
2021	7,782	5,576	7,100	6,300	2,206
2022	7,797	6,378	7,300	6,400	1,419
2023	7,136	6,672	7,400	6,600	464
2024	7,217	7,022	7,600	6,800	195

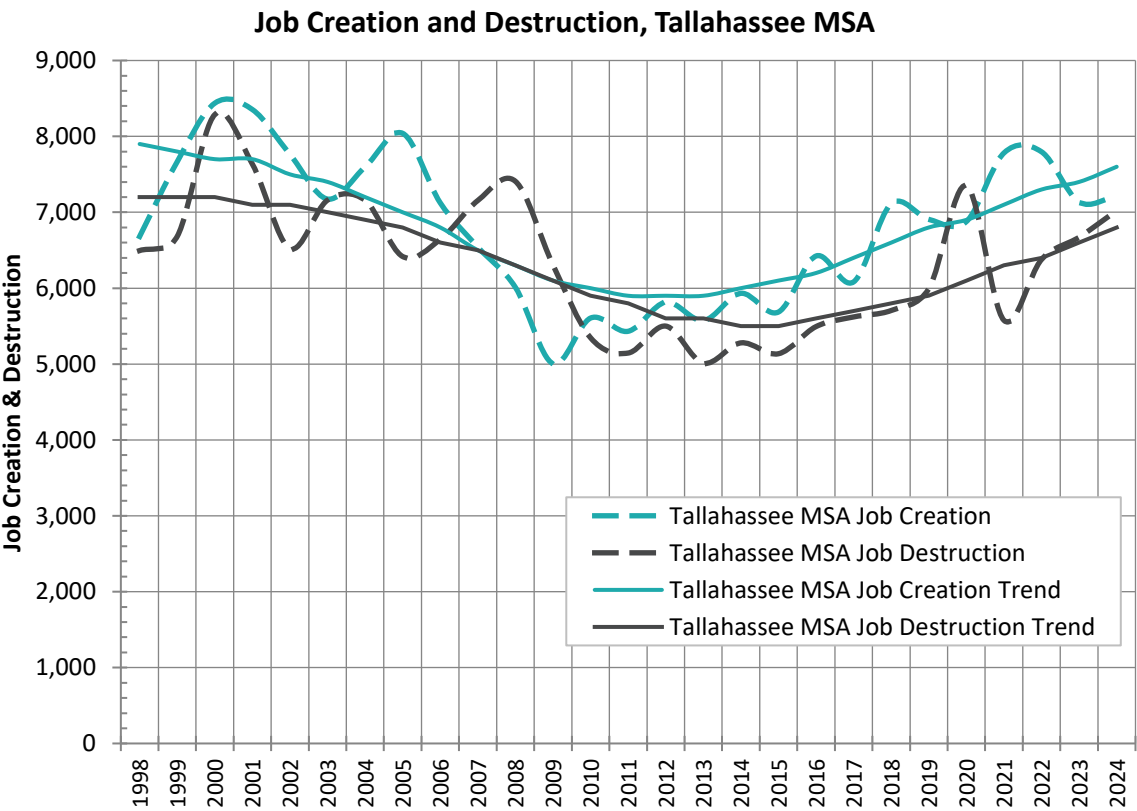
Note: Data for firms in private ownership; subject to annual revision.

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



Labor Force and Income
Job Creation and Destruction
Tallahassee MSA

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Workforce and Income

Occupational Employment and Wages

Occupations with Employment of 1,000+ in Tallahassee MSA

Trend: The 2025 estimated average hourly wage for all occupations in the Tallahassee MSA was \$28.64, with an average wage of \$35.37 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2025	(2025 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry *	Exp. **
Total all occupations	186,160	\$28.64	\$22.36	\$15.17	\$35.37
Office and Administrative Support Occupations	23,220	\$21.03	\$18.54	\$15.14	\$23.97
Business and Financial Operations Occupations	20,980	\$33.06	\$28.84	\$21.01	\$39.08
Food Preparation and Serving Related Occupations	17,270	\$16.38	\$14.32	\$13.09	\$18.03
Management Occupations	15,910	\$54.94	\$46.04	\$29.37	\$67.72
Sales and Related Occupations	15,770	\$22.08	\$16.71	\$13.45	\$26.40
Educational Instruction and Library Occupations	11,820	\$23.92	\$23.27	\$15.91	\$27.92
Healthcare Practitioners and Technical Occupations	10,970	\$45.88	\$36.46	\$22.13	\$57.75
Transportation and Material Moving Occupations	9,760	\$19.70	\$17.93	\$14.35	\$22.38
Computer and Mathematical Occupations	7,820	\$39.96	\$35.45	\$22.79	\$48.55
Construction and Extraction Occupations	7,110	\$24.67	\$22.46	\$17.15	\$28.43
Healthcare Support Occupations	6,920	\$18.79	\$17.21	\$15.03	\$20.67
Installation, Maintenance, and Repair Occupations	6,300	\$25.07	\$22.32	\$16.72	\$29.24
Management Analysts	6,160	\$31.26	\$28.30	\$22.61	\$35.59
Building and Grounds Cleaning and Maint. Occupations	5,950	\$16.97	\$16.07	\$13.64	\$18.63
Fast Food and Counter Workers	5,600	\$13.97	\$13.27	\$13.00	\$14.46
Protective Service Occupations	5,290	\$27.34	\$24.93	\$17.35	\$32.34
Retail Salespersons	5,130	\$15.93	\$14.58	\$13.18	\$17.30
General and Operations Managers	4,360	\$56.22	\$45.79	\$27.89	\$70.39
Community and Social Service Occupations	3,780	\$24.36	\$22.55	\$18.18	\$27.46
Office Clerks, General	3,710	\$20.62	\$18.44	\$14.94	\$23.46
Cashiers	3,520	\$14.72	\$14.03	\$13.08	\$15.54
Legal Occupations	3,430	\$51.58	\$44.56	\$25.32	\$64.72
Registered Nurses	3,400	\$38.73	\$38.19	\$30.58	\$42.81
Production Occupations	3,370	\$22.39	\$19.48	\$15.43	\$25.87
Arts, Design, Ent., Sports, and Media Occupations	3,160	\$28.75	\$23.49	\$15.34	\$35.46
Customer Service Representatives	3,080	\$19.42	\$17.94	\$14.93	\$21.66
Personal Care and Service Occupations	2,820	\$17.59	\$14.78	\$13.16	\$19.80
Janitors and Cleaners, Exc. Maids & Housekeeping Cleaners	2,790	\$15.63	\$14.59	\$13.59	\$16.64
Stockers and Order Fillers	2,690	\$17.78	\$16.83	\$14.48	\$19.43
Secretaries and Admin. Asst., Exc. Legal, Med., and Exec.	2,620	\$20.44	\$19.15	\$16.05	\$22.63
Waiters and Waitresses	2,600	\$18.70	\$16.76	\$13.14	\$21.48
Accountants and Auditors	2,450	\$33.97	\$29.73	\$21.58	\$40.16
Office and Administrative Support Workers, All Other	2,420	\$16.23	\$14.48	\$14.41	\$17.14
Life, Physical, and Social Science Occupations	2,240	\$31.11	\$27.44	\$21.21	\$36.06
Lawyers	2,170	\$62.53	\$49.67	\$37.91	\$74.84



Workforce and Income

Occupational Employment and Wages

Occupations with Employment of 1,000+ in Tallahassee MSA

Trend: The 2025 estimated average hourly wage for all occupations in the Tallahassee MSA was \$28.64, with an average wage of \$35.37 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2025	(2025 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry *	Exp. **
Architecture and Engineering Occupations	2,080	\$41.29	\$36.63	\$24.68	\$49.60
Home Health and Personal Care Aides	1,990	\$16.25	\$15.73	\$14.46	\$17.14
Maintenance and Repair Workers, General	1,980	\$21.60	\$20.81	\$15.97	\$24.41
Medical Secretaries and Administrative Assistants	1,720	\$18.61	\$17.89	\$15.54	\$20.14
Compliance Officers	1,700	\$27.52	\$23.61	\$19.93	\$31.31
Laborers and Freight, Stock, and Material Movers, Hand	1,640	\$17.61	\$17.12	\$13.85	\$19.49
Sales Rep. of Services, Exc. Adv., Ins., Fin. Serv., & Travel	1,640	\$35.64	\$29.75	\$18.34	\$44.29
First-Line Supervisors of Food Prep. & Serving Workers	1,620	\$20.51	\$18.18	\$14.72	\$23.40
Food Preparation Workers	1,570	\$15.76	\$16.23	\$13.22	\$17.03
Business Operations Specialists, All Other	1,530	\$37.63	\$32.27	\$20.48	\$46.20
Cooks, Restaurant	1,520	\$16.81	\$16.64	\$14.08	\$18.18
Nursing Assistants	1,520	\$17.07	\$16.43	\$15.26	\$17.97
Elementary School Teachers, Except Special Education	1,490	\$54,396	\$55,017	\$45,844	\$58,672
Computer Systems Analysts	1,480	\$38.64	\$34.86	\$25.86	\$45.03
Human Resources Specialists	1,470	\$31.71	\$27.56	\$20.79	\$37.17
First-Line Supervisors of Office & Admin. Support Workers	1,430	\$30.62	\$28.72	\$20.18	\$35.84
Instructional Coordinators	1,400	\$26.68	\$26.73	\$20.66	\$29.69
Construction Laborers	1,390	\$19.91	\$18.61	\$15.43	\$22.15
Medical Assistants	1,390	\$22.10	\$17.73	\$16.18	\$25.06
Computer User Support Specialists	1,380	\$26.87	\$23.64	\$18.74	\$30.94
Financial Managers	1,370	\$58.28	\$47.36	\$33.05	\$70.90
First-Line Supervisors of Retail Sales Workers	1,370	\$23.36	\$21.98	\$15.76	\$27.16
Software Developers	1,320	\$59.84	\$58.56	\$37.85	\$70.84
Project Management Specialists	1,280	\$44.20	\$39.78	\$29.02	\$51.78
Heavy and Tractor-Trailer Truck Drivers	1,260	\$24.19	\$22.34	\$18.36	\$27.11
Landscaping and Groundskeeping Workers	1,260	\$17.66	\$17.09	\$14.73	\$19.13
Correctional Officers and Jailers	1,180	\$25.07	\$23.16	\$21.71	\$26.75
Teaching Assistants, Postsecondary	1,140	\$35,409	\$35,380	\$33,908	\$36,159
Bookkeeping, Accounting, and Auditing Clerks	1,130	\$23.41	\$22.07	\$17.09	\$26.57
Dining Rm. & Cafeteria Attendants and Bartender Helpers	1,130	\$16.59	\$17.67	\$13.46	\$18.16
Educational, Guidance & Career Counselors and Advisors	1,120	\$22.86	\$22.55	\$19.39	\$24.60
Maids and Housekeeping Cleaners	1,090	\$14.91	\$13.93	\$13.25	\$15.74
First-Line Supvrs. of Const. Trades & Extraction Workers	1,050	\$35.31	\$34.76	\$24.25	\$40.83
Light Truck Drivers	1,030	\$18.96	\$18.14	\$15.08	\$20.89
Sales Rep., Wholesale & Mfg., Exc. Tech. & Scientific Prod.	1,030	\$34.70	\$29.02	\$19.17	\$42.46



Workforce and Income

Occupational Employment and Wages

Occupations with Employment of 1,000+ in Tallahassee MSA

Trend: The 2025 estimated average hourly wage for all occupations in the Tallahassee MSA was \$28.64, with an average wage of \$35.37 per hour for experienced workers in their occupation.

Occupational Title	Hourly Wage				
	2025	(2025 Wage Estimates in dollars)			
	Emp.	Mean	Median	Entry*	Exp.**
Teaching Assistants, Except Postsecondary	1,030	\$32,456	\$31,200	\$28,668	\$34,350

* 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 Commerce, Labor Market Information, Occupational Employment and Wage Statistics



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 Revenue over \$10 Million

Trend: Tallahassee has 60 non-profit organizations whose gross receipts each annually exceed \$10 million, together employing nearly 16,000.

Name	Year of Formation	Internal Revenue Code Tax Exempt Status	Employees	Volunteers	Voting Board Members	Gross Receipts (\$ millions)
Florida Insurance Guaranty Assn Inc	1970	501(c)(6)	24	9	9	\$5,202.8
Capital Health Plan	1978	501(c)(4)	533	–	13	\$1,467.9
Tallahassee Memorial Healthcare Inc	1979	501(c)(3)	7,771	694	16	\$1,085.7
Florida Healthy Kids Corporation	1990	501(c)(3)	25	17	10	\$453.6
Big Bend Community Based Care Inc	2002	501(c)(3)	305	2	18	\$272.7
Florida State University Fdn Inc	1960	501(c)(3)	0	476	44	\$268.8
Florida Agricultural & Mechanical Univ Fdn	1966	501(c)(3)	0	32	28	\$204.0
Triumph Gulf Coast Inc	2017	501(c)(3)	1	7	7	\$113.0
Florida Tourism Industry Marketing Corps	1995	501(c)(6)	93	32	32	\$106.0
Seminole Boosters Inc	1974	501(c)(3)	70	115	55	\$80.9
First Commerce Credit Union	1940	501(c)(14)	270	12	7	\$70.4
Envision Credit Union	1954	501(c)(14)	309	8	6	\$60.9
Community Fdn of North Florida Inc	1997	501(c)(3)	4	16	16	\$56.0
Apalachee Center Inc	1966	501(c)(3)	748	–	13	\$54.7
Florida Assn of Rehabilitation Facilities Inc	1976	501(c)(3)	16	21	17	\$52.5
Fish & Wildlife Fdn of Florida Inc	1994	501(c)(3)	14	0	22	\$52.0
Healthy Start Momcare Network Inc	2012	501(c)(3)	21	12	11	\$51.5
School Board of Leon County Florida Voluntary Employee Benefits Trust	1982	501(c)(9)	0	5	5	\$51.2
Florida Network of Youth and Family Services Inc	1976	501(c)(3)	16	17	13	\$49.2
Florida State University Research Fdn Inc	1993	501(c)(3)	0	3	9	\$48.1
America's Second Harvest of the Big Bend	1985	501(c)(3)	67	1,682	15	\$46.2
Goodwill Industries Big Bend Inc	1967	501(c)(3)	1,520	0	23	\$42.0
Twin Oaks Juvenile Development Inc	1998	501(c)(3)	839	175	5	\$40.9
Institute for Intergovernmental Research Inc	1978	501(c)(3)	229	0	9	\$39.7
The Ounce of Prevention Fund of Florida Inc	1989	501(c)(3)	44	13	14	\$39.3
Florida Surplus Lines Service Office	1998	501(c)(6)	45	9	9	\$37.8
Florida Education Assn	2000	501(c)(5)	192	12	15	\$37.4
Early Learning Coalition of the Big Bend Region	2000	501(c)(3)	74	30	21	\$35.1
Feeding Florida Inc	1993	501(c)(3)	21	9	9	\$35.0
Big Bend Hospice Inc	1983	501(c)(3)	377	270	18	\$30.9
Florida State University Credit Union	1954	501(c)(14)	122	15	9	\$29.5
Florida State University Athletics Assn Inc	2016	501(c)(3)	0	2	5	\$29.3
Children's Forum Inc	1989	501(c)(3)	56	12	11	\$28.0
Alfred B. Maclay Jr. Day School	1967	501(c)(3)	421	47	17	\$26.5



Economic Factors

Non-profit Organizations:

Annual Revenue over \$10 Million

Trend: Tallahassee has 60 non-profit organizations whose gross receipts each annually exceed \$10 million, together employing nearly 16,000.

Name	Year of Formation	Internal Revenue Code Tax Exempt Status	Employees	Volunteers	Voting Board Members	Gross Receipts (\$ millions)
Florida Assn of Court Clerks	1992	501(c)(6)	149	68	15	\$25.8
Tall Timbers Fdn Inc	2000	501(c)(3)	0	0	6	\$23.9
Florida Sheriffs Assn Inc	1910	501(c)(3)	39	19	17	\$23.0
Florida State University Intl Programs Assn	1992	501(c)(3)	0	0	12	\$22.9
Florida First Capital Finance Corp Inc	1983	501(c)(4)	65	18	8	\$22.6
CareerSource Florida Inc	2000	501(c)(3)	31	35	28	\$19.8
DISC Village Inc	1972	501(c)(3)	280	25	5	\$19.6
Big Bend Cares Inc	1987	501(c)(3)	58	145	19	\$19.5
North Florida Medical Centers Inc	1978	501(c)(3)	226	–	11	\$17.9
Tall Timbers Research Inc	1958	501(c)(3)	149	0	18	\$17.5
Florida Hospital Assn Inc	1928	501(c)(6)	31	17	17	\$17.1
Florida Alcohol & Drug Abuse Assn	1981	501(c)(3)	0	12	12	\$16.6
FSU Financial Assistance Inc	1994	501(c)(3)	4	10	10	\$15.8
Florida Assn of Healthy Start Coalitions Inc	1995	501(c)(3)	0	32	31	\$14.9
Florida Council Against Sexual Violence Inc	1986	501(c)(3)	22	19	15	\$14.9
Bond Community Health Center Inc	1984	501(c)(3)	108	50	10	\$14.3
Florida LambdaRail	2003	501(c)(3)	0	13	13	\$13.0
Tallahassee Memorial Healthcare Fdn Inc	1976	501(c)(3)	0	140	37	\$12.6
Florida Assn of Insurance Agents Inc	1904	501(c)(3)	24	294	14	\$12.4
Miracle Hill Nursing and Rehabilitation Ctr Inc	1968	501(c)(3)	0	0	10	\$12.1
Florida Medical Practice Plan Inc	2006	501(c)(3)	149	0	11	\$12.0
Area Agency on Aging for North Florida Inc	1978	501(c)(3)	30	28	14	\$11.6
Florida Pregnancy Care Network Inc	2005	501(c)(3)	3	5	5	\$11.6
Disability Rights Florida Inc	1987	501(c)(3)	110	18	15	\$11.3
Florida Chamber of Commerce Inc	1916	501(c)(6)	56	62	62	\$11.0
Florida Restaurant & Lodging Assn Inc	1946	501(c)(6)	37	225	143	\$10.6

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 years is most recent available, 2023 to 2025.

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



Workforce and Income

Professional Engineers in Tallahassee MSA

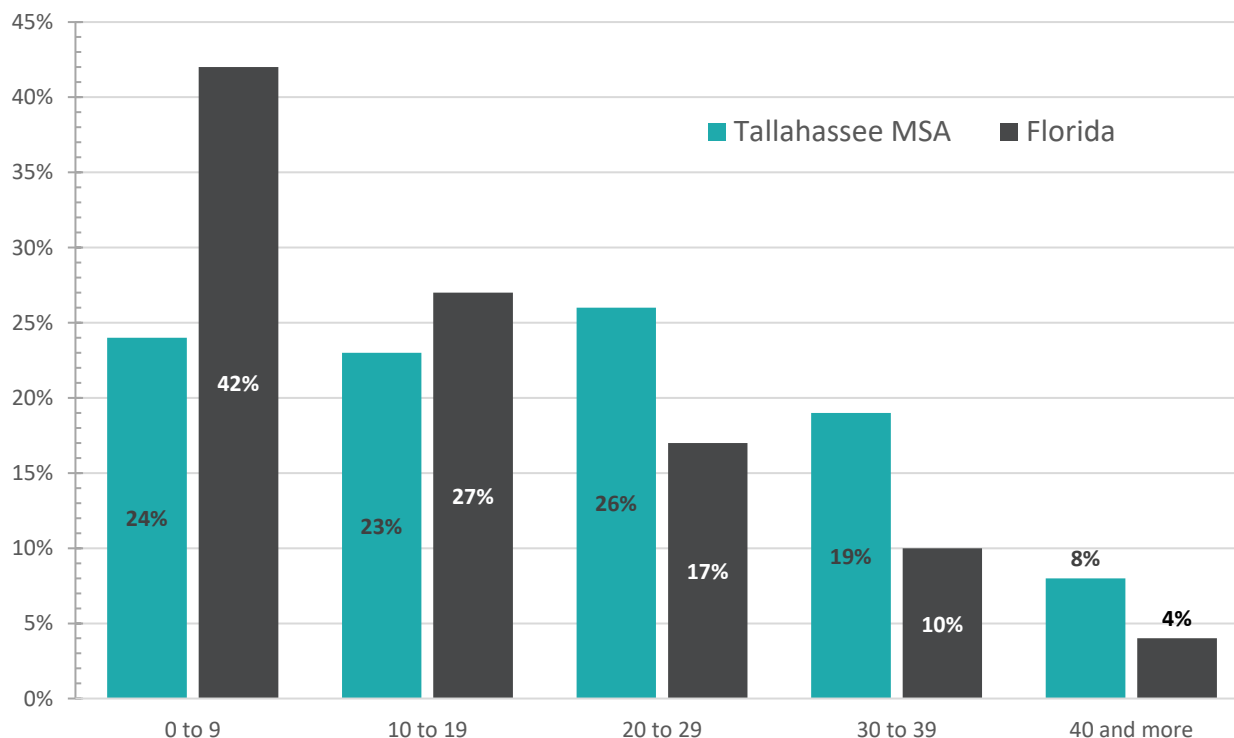
Trend: Professional Engineers (PEs) have an essential role in a community's economic development and redevelopment. Their education, experience, and professional obligations for protecting public health and safety place them in the vanguard of innovation for public infrastructure and private-sector development. Of the over 500 PEs reported in the Tallahassee metro area, 53% 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	125	24%	12,887	42%
10 to 19	122	23%	8,166	27%
20 to 29	136	26%	5,193	17%
30 to 39	102	19%	3,053	10%
40 and more	40	8%	1,241	4%
Total	525	100 %	30,540	100 %

Note: Professional Engineers reported as of May 2025.

Source: Florida Department of Business and Professional Regulation, Florida Board of Professional Engineers.

Professional Engineers in Tallahassee MSA and Florida, Years Licensed





Workforce and Income

Certified Public Accountants in Tallahassee MSA

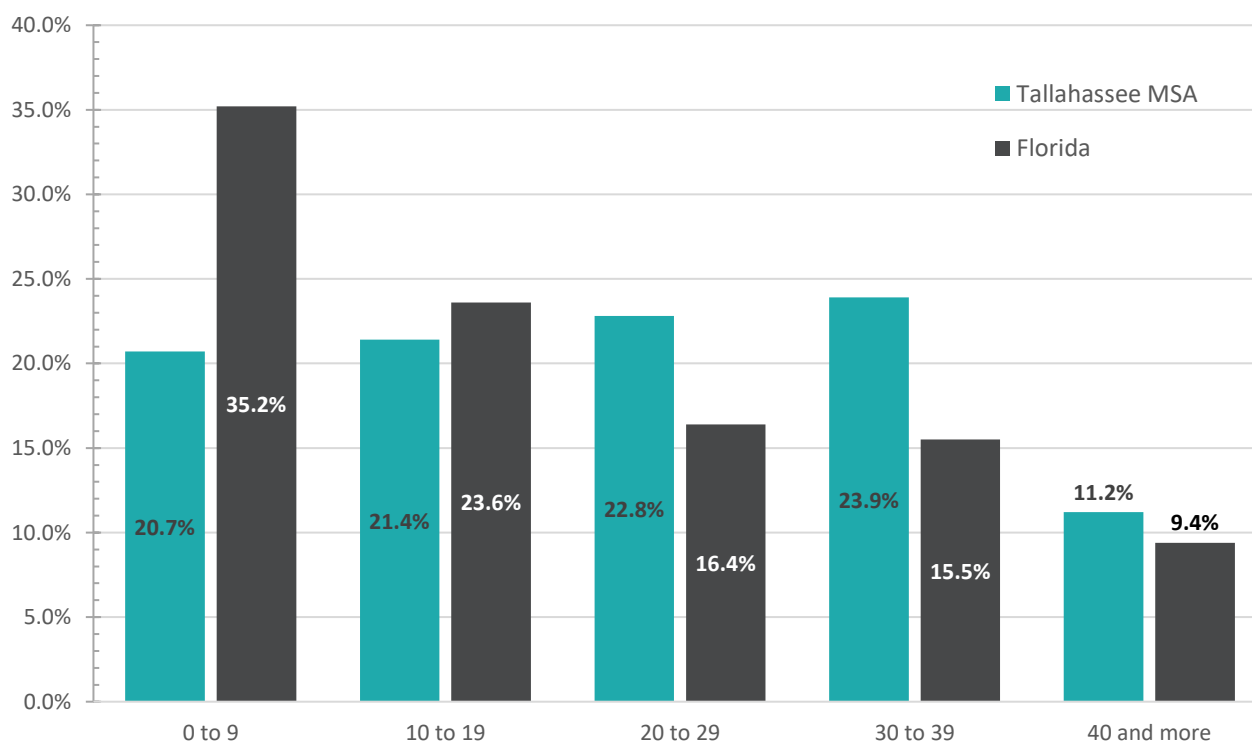
Trend: Certified Public Accountants (CPAs) analyze and plan how money is used by businesses, nonprofit organizations, governments, and individuals. CPAs perform vital functions in economic development by preparing financial statements, evaluating investments, performing cost analyses, and detecting fraud. Of over 700 active CPAs in the Tallahassee MSA, 58% have 20 years of experience or more, compared to about 41% statewide.

Years Experience	Tallahassee MSA		Florida	
	Number	Percent	Number	Percent
0 to 9	148	20.7%	9,996	35.2%
10 to 19	153	21.4%	6,693	23.6%
20 to 29	163	22.8%	4,662	16.4%
30 to 39	171	23.9%	4,388	15.5%
40 and more	80	11.2%	2,655	9.4%
Total	715	100.0%	28,394	100.0%

Note: Percentages may not sum to 100.0% due to rounding. Certified Public Accountants current and active in Florida as of August 2025.

Source: Florida Department of Business and Professional Regulation

Certified Public Accountants in Tallahassee MSA and Florida, Years Licensed





Economic Factors

Gross Domestic Product (GDP) in Tallahassee Metro Area

(\$ billions and percent change from previous year)

Trend: In 2024, the Tallahassee Metropolitan Area's (MSA) Real Gross Domestic Product (GDP) was \$21.3 billion, up 4.3% from 2023, higher than Florida's Real GDP 3.3% increase and higher than the overall 2.8% increase for the US. Leon County typically accounts for 87-88% of metro area GDP.

Tallahassee MSA GDP in current dollars, and Real GDP in chained 2017 dollars*

Year	GDP (\$ billions, current dollars)	Real GDP (\$ billions, inflation- adjusted)	Real GDP, Percent Change from Prior Year		
			Tallahassee MSA	Florida	US
2001	\$10.4	\$15.0			
2002	\$11.0	\$15.4	2.7%	4.4%	1.7%
2003	\$11.5	\$15.8	2.2%	4.8%	2.8%
2004	\$12.3	\$16.3	3.6%	6.7%	3.8%
2005	\$12.7	\$16.4	0.3%	5.9%	3.5%
2006	\$13.2	\$16.4	-0.1%	3.0%	2.8%
2007	\$14.1	\$17.0	3.8%	1.4%	2.0%
2008	\$14.2	\$16.8	-1.1%	-3.3%	0.1%
2009	\$14.1	\$16.3	-3.1%	-5.8%	-2.6%
2010	\$14.2	\$16.2	-0.5%	1.4%	2.7%
2011	\$14.4	\$16.1	-0.5%	-0.3%	1.6%
2012	\$14.7	\$16.2	0.3%	1.0%	2.3%
2013	\$14.7	\$15.8	-2.2%	2.6%	2.1%
2014	\$15.3	\$16.1	1.5%	2.9%	2.5%
2015	\$15.7	\$16.2	0.9%	4.4%	2.9%
2016	\$16.4	\$16.6	2.5%	3.5%	1.8%
2017	\$17.1	\$17.1	3.0%	3.7%	2.5%
2018	\$17.5	\$17.2	0.4%	3.5%	3.0%
2019	\$18.4	\$17.6	2.5%	3.3%	2.6%
2020	\$18.6	\$17.3	-1.9%	-1.1%	-2.1%
2021	\$20.5	\$18.4	6.5%	9.3%	6.2%
2022	\$22.8	\$19.5	6.1%	6.2%	2.5%
2023	\$25.0	\$20.4	4.8%	5.1%	2.9%
2024	\$26.9	\$21.3	4.3%	3.3%	2.8%

Note: Annual BEA updates generally include revisions of at least the three most recent calendar years and incorporate newly available major annual source data. BEA conducts comprehensive updates at about 5-year intervals that incorporate major periodic source data, as well as improvements in concepts and methods.

*Real GDP is expressed in chained 2017 dollars as an inflation-adjusted measure, calculated using a chain-type quantity index with 2017 as the reference year.

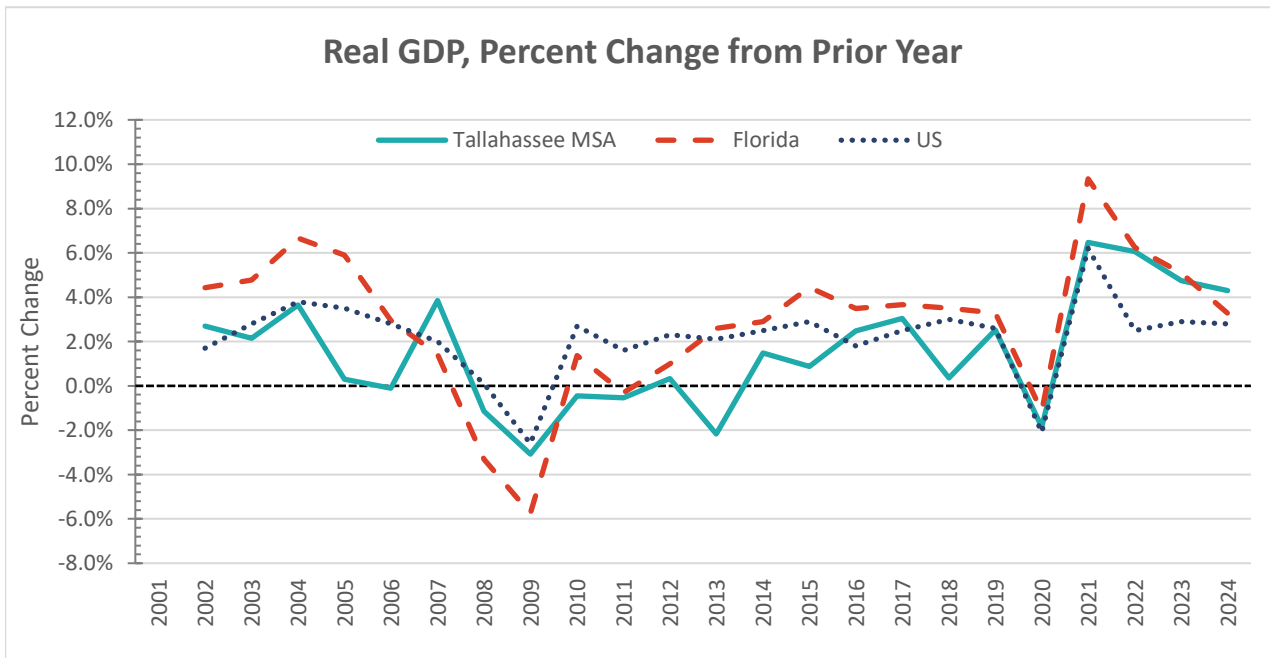
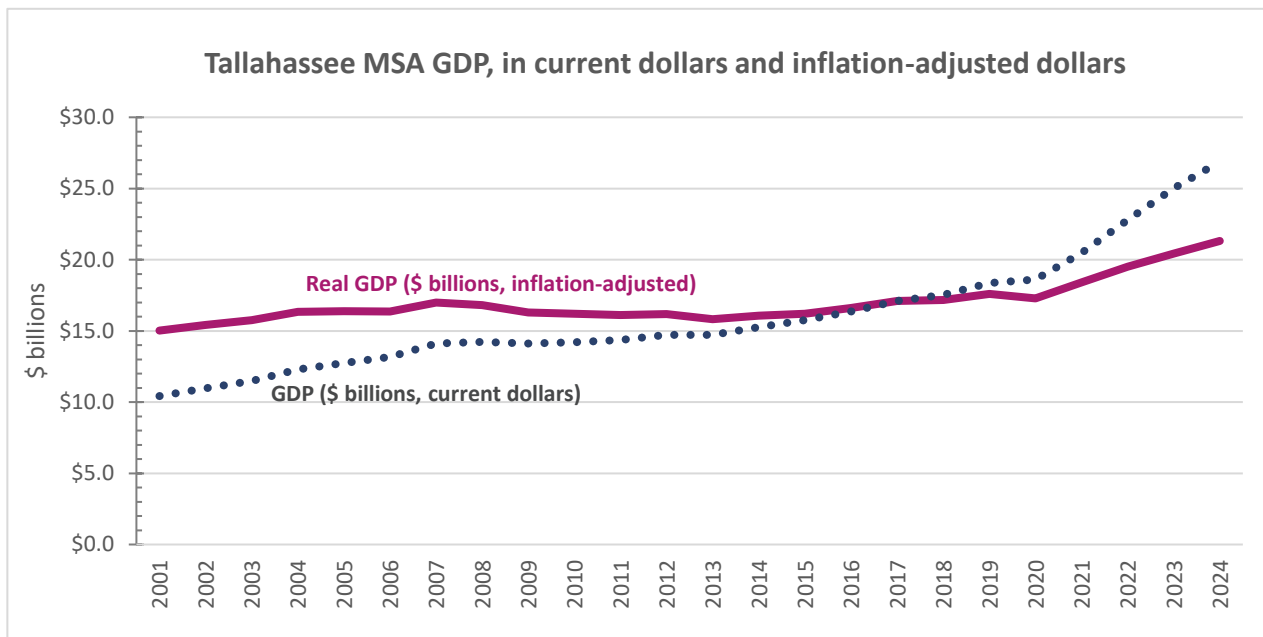
Source: U.S. Department of Commerce, Bureau of Economic Analysis



Economic Factors

Gross Domestic Product (GDP) in Tallahassee Metro Area

(\$ billions and percent change from previous year)





Economic Factors

Productivity

Real 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 2017) dollars. Annual changes in productivity for the Tallahassee metro area have fluctuated between a low of -3.8% between 2012 and 2013 to a high of 5.2% from 2001 to 2002.

Year	Private Industries Real GDP (\$ millions)	Avg. Monthly Private Employment	Productivity (Private Real GDP per Private Sector Employee)	Productivity Change from Prior Year
2001	\$9,365	101,500	\$92,269	
2002	\$9,745	100,300	\$97,156	5.2%
2003	\$10,059	101,200	\$99,399	2.3%
2004	\$10,573	103,900	\$101,764	2.4%
2005	\$11,101	109,000	\$101,840	0.1%
2006	\$11,133	112,700	\$98,783	-3.0%
2007	\$11,309	113,800	\$99,373	0.6%
2008	\$11,279	112,800	\$99,988	0.6%
2009	\$10,718	108,200	\$99,056	-0.9%
2010	\$10,647	105,900	\$100,535	1.5%
2011	\$10,744	105,300	\$102,033	1.5%
2012	\$10,897	104,900	\$103,884	1.8%
2013	\$10,605	106,000	\$100,049	-3.8%
2014	\$10,882	109,100	\$99,745	-0.3%
2015	\$11,203	110,600	\$101,293	1.5%
2016	\$11,661	115,200	\$101,228	-0.1%
2017	\$12,121	116,700	\$103,867	2.6%
2018	\$12,374	120,200	\$102,945	-0.9%
2019	\$12,972	122,400	\$105,979	2.9%
2020	\$12,521	116,700	\$107,291	1.2%
2021	\$13,655	123,000	\$111,013	3.4%
2022	\$14,576	130,600	\$111,608	0.5%
2023	\$15,452	134,300	\$115,056	3.0%
2024	\$16,164	137,700	\$117,387	2.0%

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 2017 dollars.



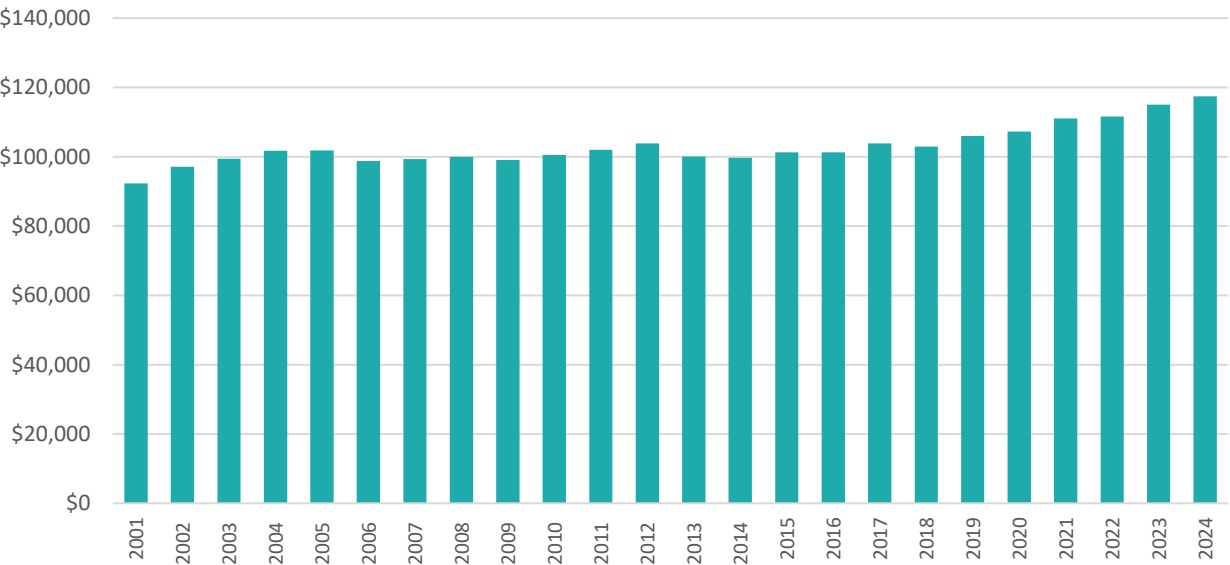
Economic Factors

Productivity

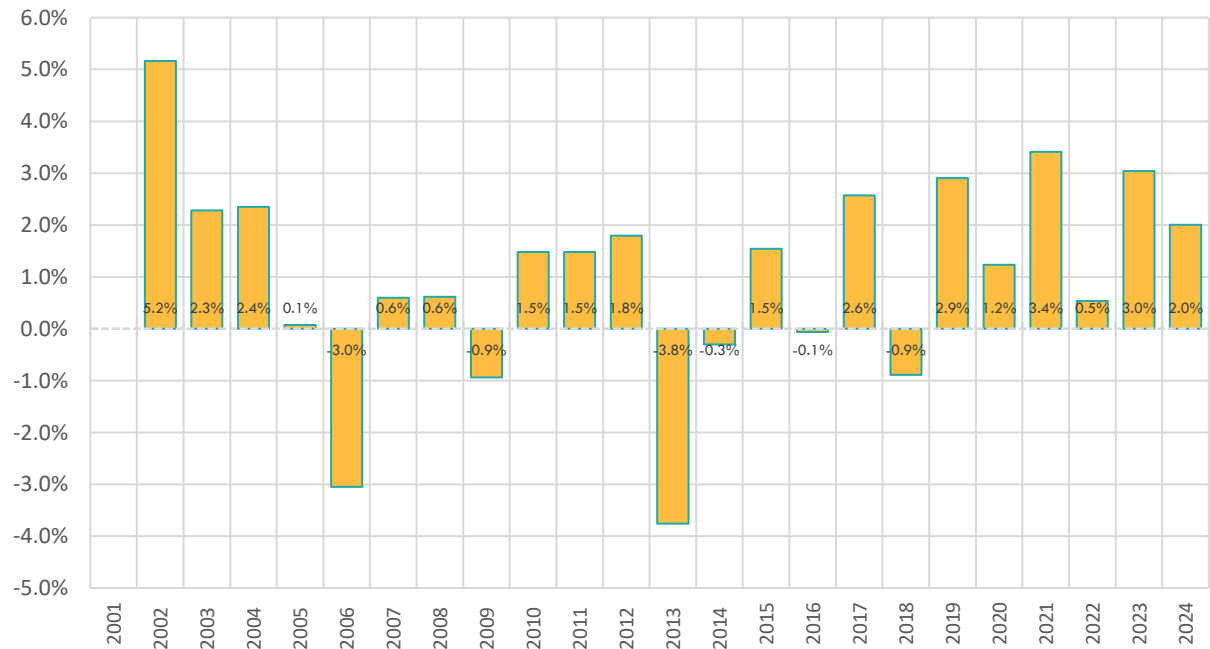
Real GDP per Private Sector Employee, Tallahassee MSA

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 2017) dollars. Annual changes in productivity for the Tallahassee metro area have fluctuated between a low of -3.8% between 2012 and 2013 to a high of 5.2% from 2001 to 2002.

Productivity (GDP per Private Sector Employee)



Productivity Change from Prior Year





Economic Factors

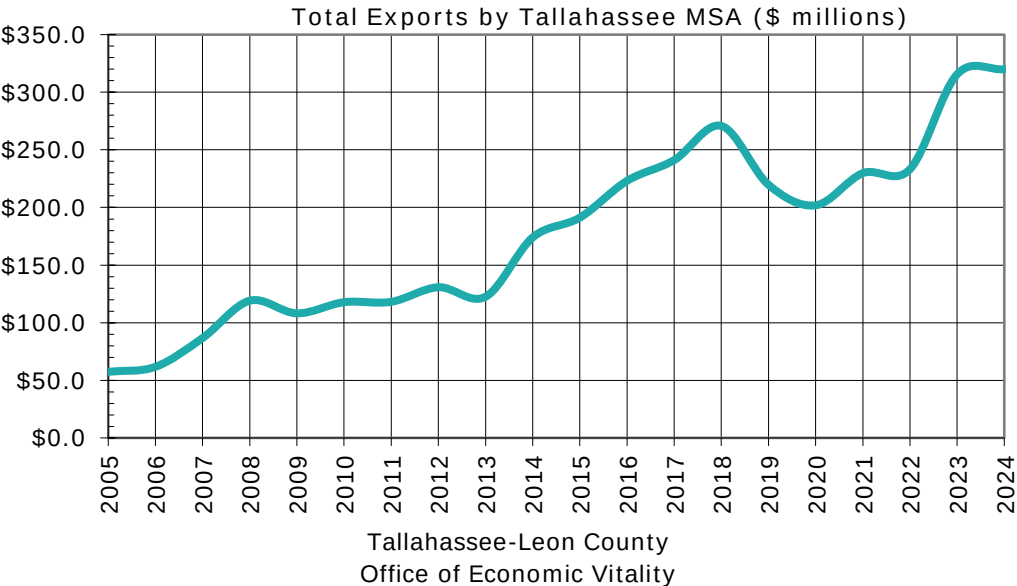
Exports from Tallahassee MSA

Total Merchandise Exports

Trend: Between 2015 and 2024, total merchandise exports from Tallahassee MSA grew by 67%, with an average annual growth rate around 7%. Major sectors for 2024 were: minerals and ores, \$32.5M; transportation equipment manufacturing, \$27.4M; and computer and electronic products, \$9.9M. The remaining \$250.2M (including machinery manufacturing) was undisclosed due to confidentiality. Major destinations included: Asia, \$109.6M; European Union, \$76.5M; South America, \$20.3M; and Africa, \$1.0M. Tallahassee accounts for around 0.6% of Florida's total exports.

Year	Total Exports (\$ millions)	% Change from Previous Year
2005	\$57.4	
2006	\$61.7	7.5%
2007	\$86.7	40.5%
2008	\$119.1	37.4%
2009	\$108.1	-9.2%
2010	\$117.8	9.0%
2011	\$118.1	0.3%
2012	\$130.8	10.8%
2013	\$122.5	-6.3%
2014	\$174.0	42.0%
2015	\$191.2	9.9%
2016	\$223.1	16.7%
2017	\$241.1	8.1%
2018	\$270.8	12.3%
2019	\$219.7	-18.9%
2020	\$201.9	-8.1%
2021	\$229.8	13.8%
2022	\$233.2	1.5%
2023	\$315.6	35.3%
2024	\$320.0	1.4%

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

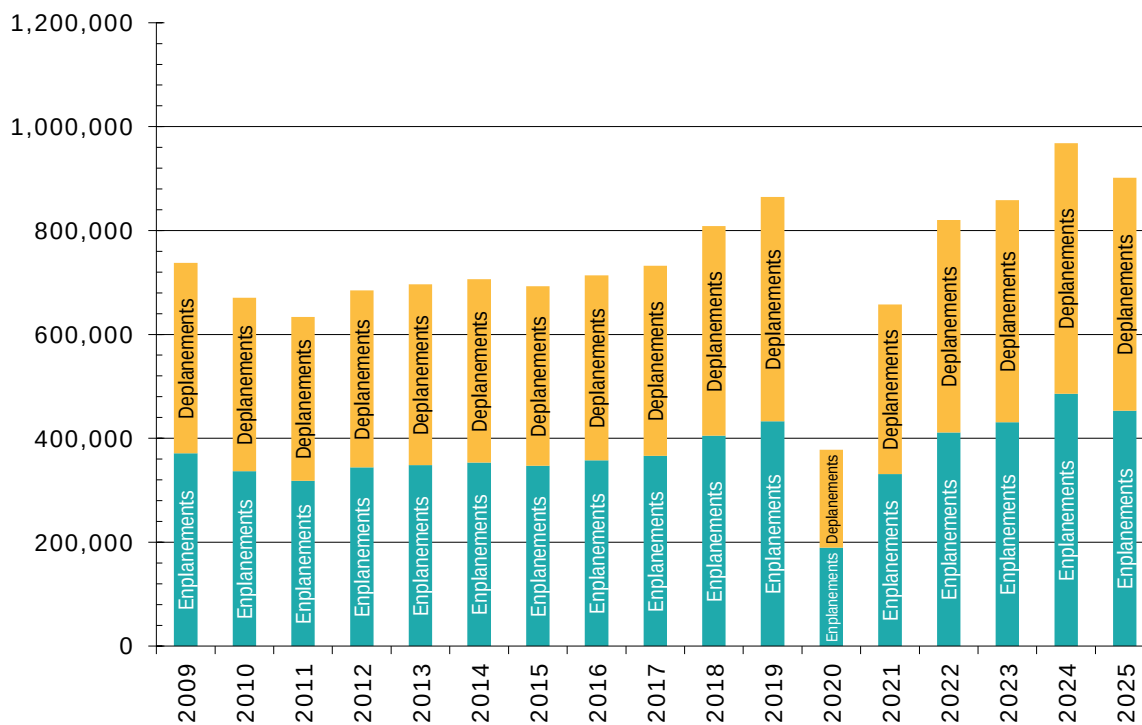
Total Passengers at TLH

Trend: Passenger traffic at Tallahassee International Airport in 2025 decreased by 6.9% compared to 2024 but was still the second-highest annual passenger total since 2007.

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	189,549	188,511	378,060	-56.3%
2021	330,827	326,642	657,469	73.9%
2022	411,230	409,361	820,591	24.8%
2023	430,857	427,835	858,692	4.6%
2024	485,904	482,296	968,200	12.8%
2025	453,400	447,953	901,353	-6.9%

Source: Tallahassee International Airport

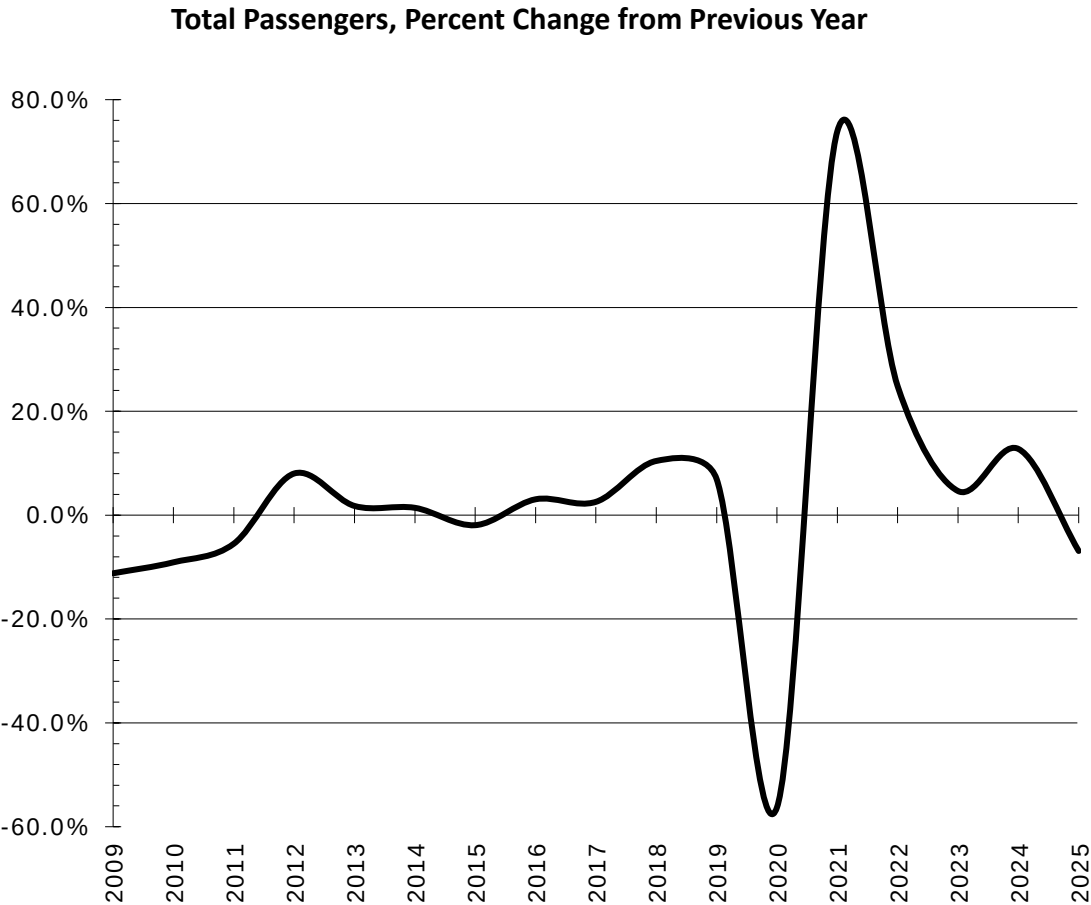
Total Passengers at Tallahassee International Airport





Economic Factors
Airport Traffic Statistics
Total Passengers at TLH

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Economic Factors

Air Freight

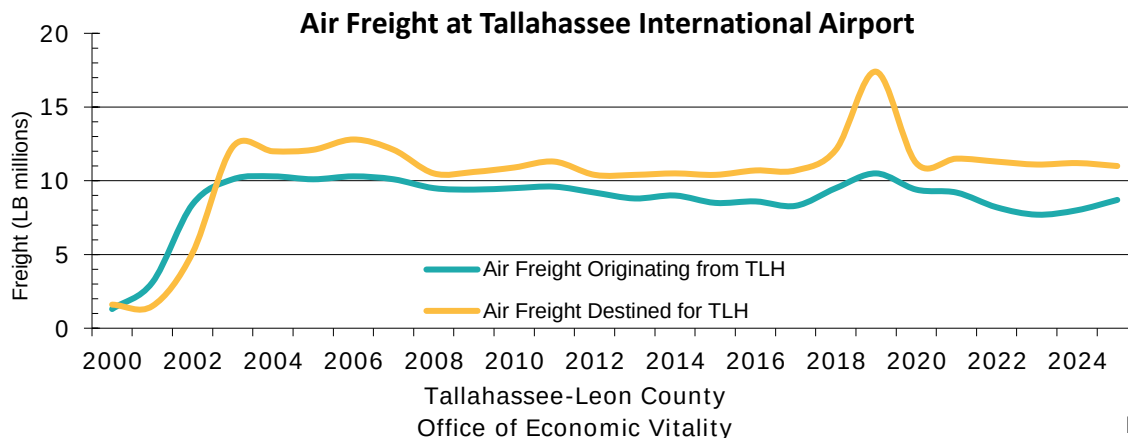
Total Air Freight at TLH

In 2025, 8.7M pounds of air freight originated from Tallahassee International Airport, with 86% destined for Memphis, TN. That year, 11.0M pounds of inbound air freight arrived at TLH, with 90% 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	12.0	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%
2021	9.2	11.5	20.7	<1%
2022	8.2	11.3	19.5	-6%
2023	7.7	11.1	18.8	-4%
2024	8.0	11.2	19.2	2%
2025	8.7	11.0	19.7	3%

Note: Air Freight in millions of pounds.

Source: US Department of Transportation, Bureau of Transportation Statistics





Economic Factors

Leon County Tourism

Visitors, Visitor Spending and Economic Impact

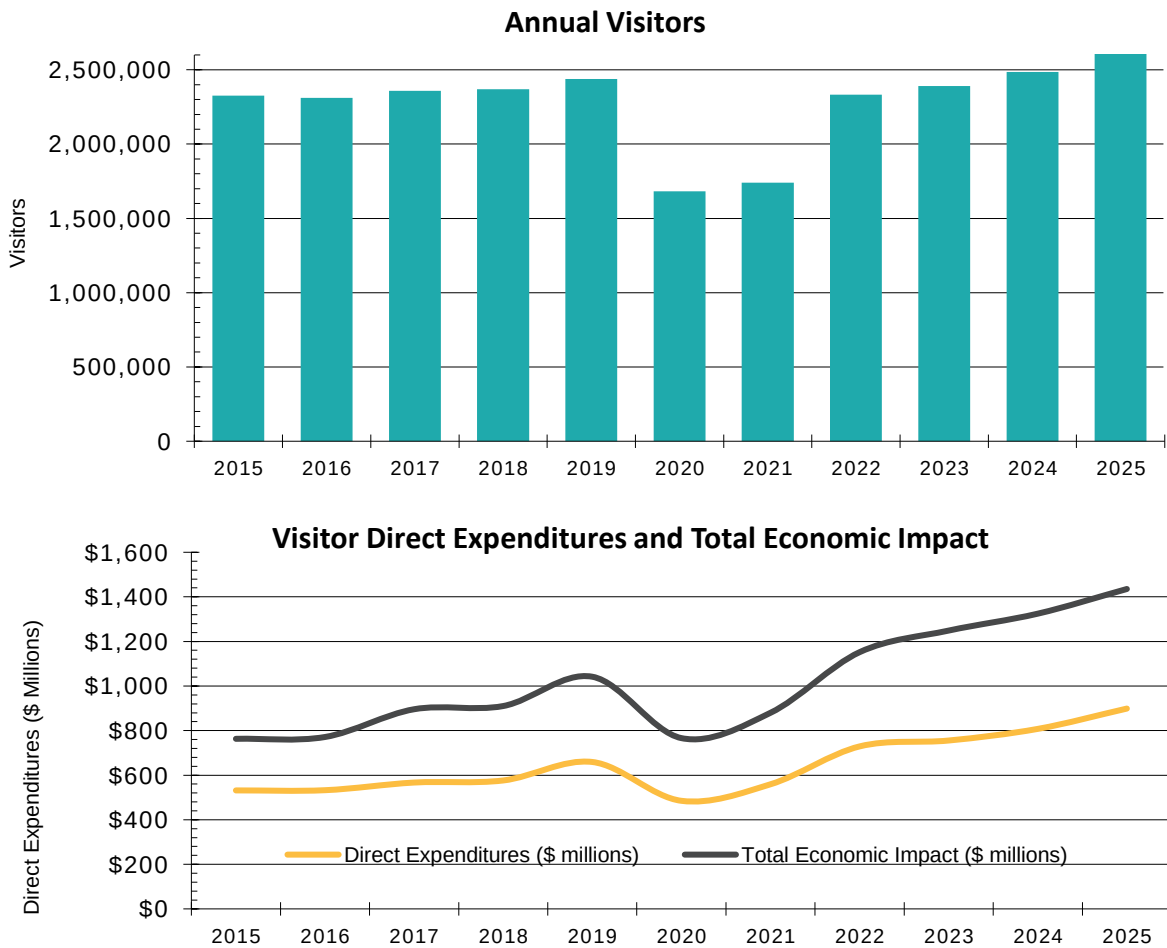
Trend: In FY 2025, Leon County had 2.62 million visitors, up 5.4% from FY 2024. Direct expenditures of visitors amounted to \$898.8 million in FY 2025, an increase of 11.3% from FY 2024.

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
2021	1,740,868	\$559.1	\$879.9
2022	2,333,400	\$729.0	\$1,151.8
2023	2,390,100	\$755.5	\$1,248.7
2024	2,485,300	\$807.7	\$1,324.6
2025	2,620,100	\$898.8	\$1,435.3

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





Economic Factors

Leon County Tourism

Visitors, Visitor Spending and Economic Impact

Trend: In FY 2025, Leon County had 2.62 million visitors, up 5.4% from FY 2024. Direct expenditures of visitors amounted to \$898.8 million in FY 2025, an increase of 11.3% from FY 2024.

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

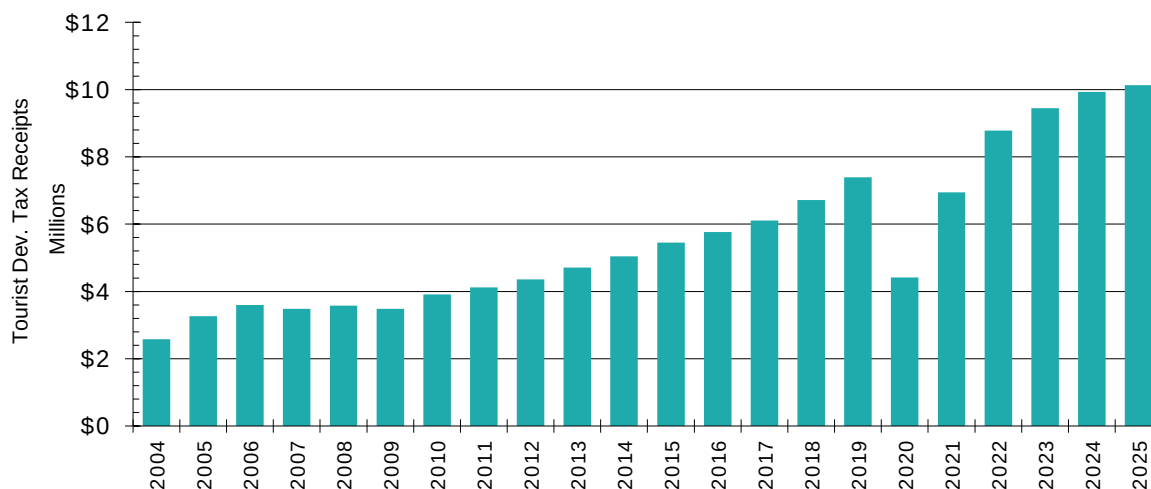
Tourist Development Tax Receipts

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%
2021	\$6,948,665	\$2,530,861	57.3%
2022	\$8,778,625	\$1,829,960	26.3%
2023	\$9,445,876	\$667,251	7.6%
2024	\$9,934,402	\$488,526	5.2%
2025	\$10,133,920	\$199,518	2.0%

Source: Florida Department of Revenue

Tallahassee Metro Area Tourist Development Tax Receipts





Economic Factors

Taxable Sales:

Annual Taxable Sales, Change from Previous Year (\$ millions)

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 1.0% in the Tallahassee MSA in 2025. Taxable sales for the State of Florida were up 1.7% in 2025 compared with 2024.

Year	Leon County	Change from Previous Year	Tallahassee MSA	Change from Previous Year	State of Florida	Change from 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	6.1%	\$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	\$4,375.5	3.9%	\$5,019.7	4.5%	\$452,421.8	6.2%
2019	\$4,510.1	3.1%	\$5,336.1	6.3%	\$473,808.9	4.7%
2020	\$4,164.1	-7.4%	\$4,967.2	-6.9%	\$444,454.7	-6.2%
2021	\$4,977.2	22.3%	\$5,994.3	20.7%	\$580,146.8	30.5%
2022	\$5,353.0	7.1%	\$6,392.5	6.6%	\$660,777.2	13.9%
2023	\$5,504.7	1.6%	\$6,486.0	1.5%	\$673,928.4	2.0%
2024	\$5,693.2	2.8%	\$6,644.6	2.4%	\$684,401.4	1.6%
2025	\$5,551.6	-2.8%	\$6,578.4	-1.0%	\$695,844.7	1.7%

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

Source: Florida Department of Revenue

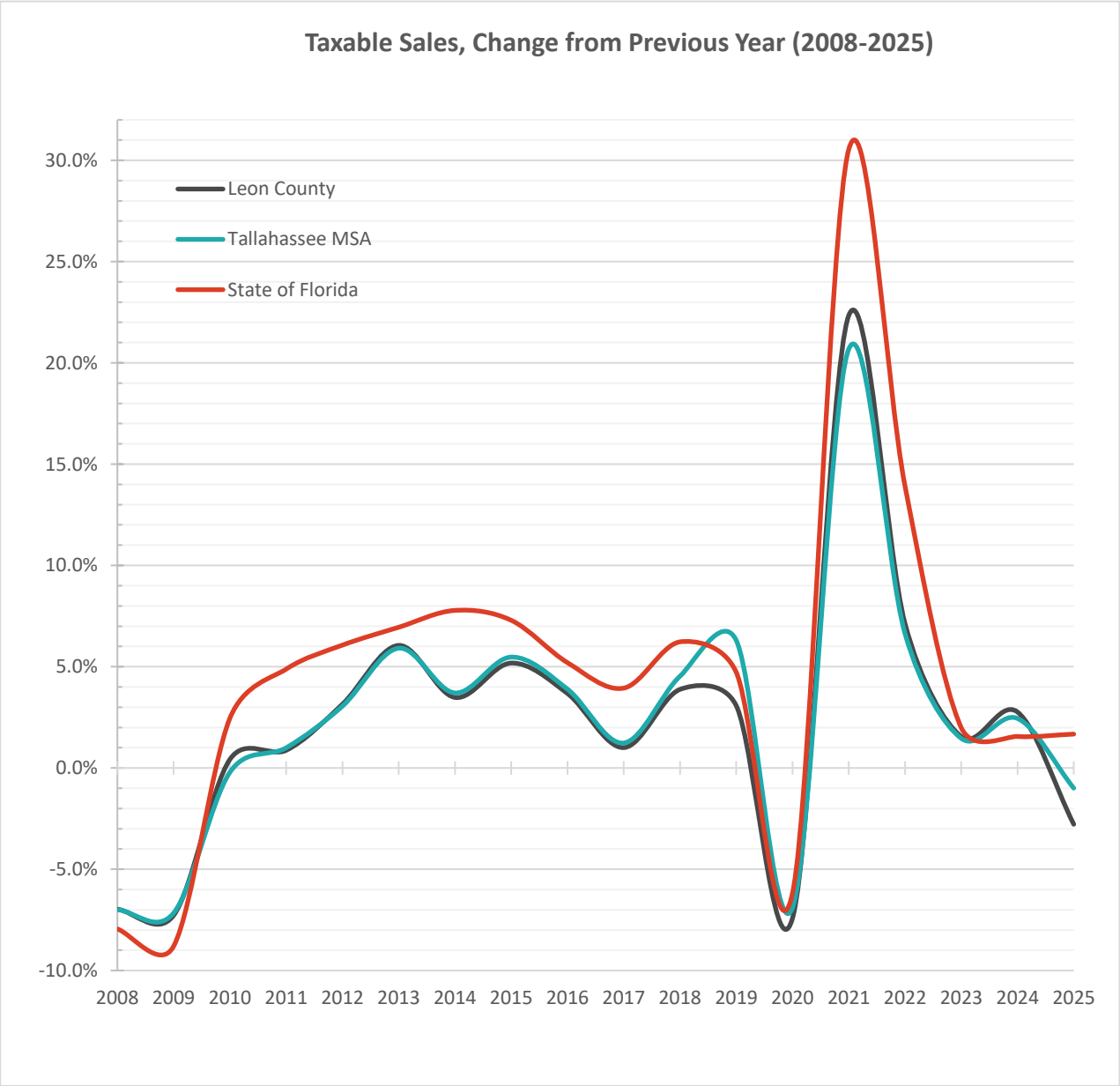


Economic Factors

Taxable Sales:

Annual Taxable Sales, Change from Previous Year (\$ millions)

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 1.0% in the Tallahassee MSA in 2025. Taxable sales for the State of Florida were up 1.7% in 2025 compared with 2024.





Economic Factors

Taxable Sales:

Annual Taxable Sales (\$ millions),

Tallahassee MSA by Category

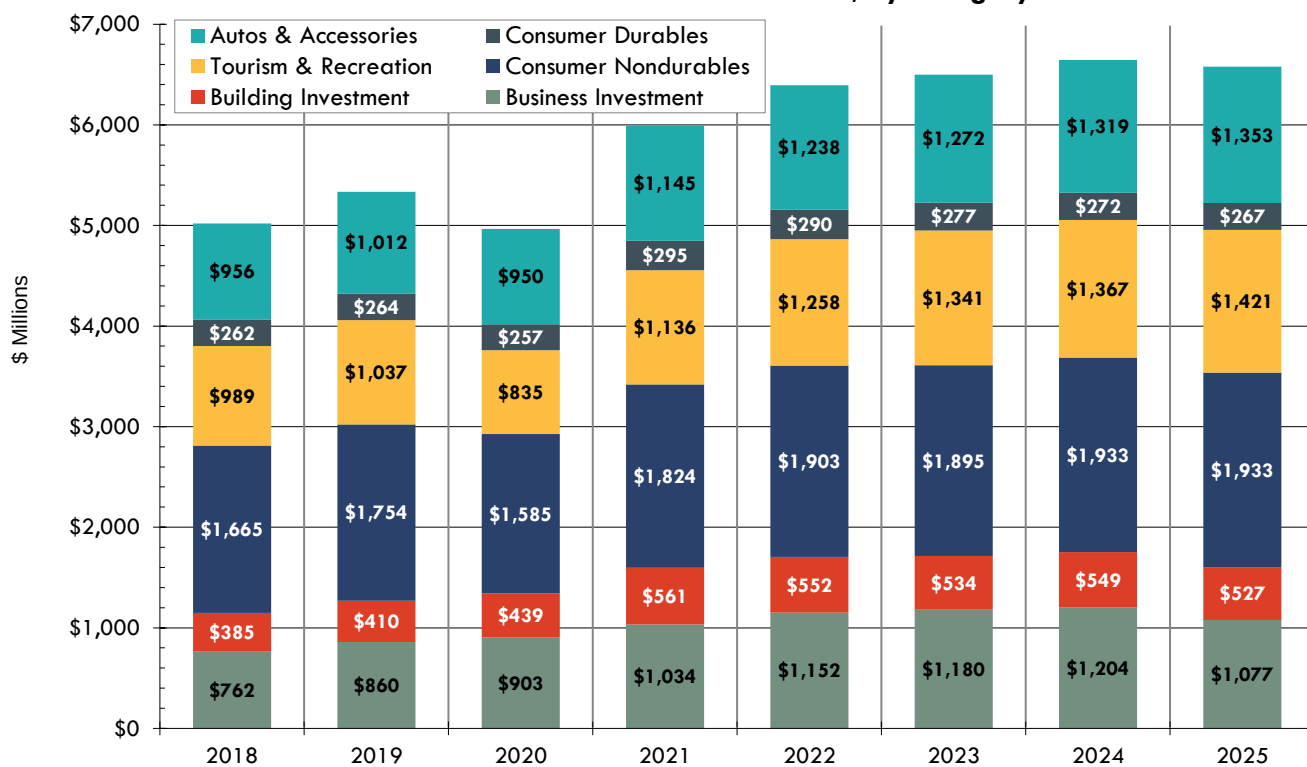
Trend: For the Tallahassee MSA, 2021 was the most recent year where all six of the major sales tax categories exhibited an increase in taxable sales each year compared to the prior year. The 2021-2025 average annual growth rate for the categories included: Tourism & Recreation, 11.9%; Autos & Accessories, 7.6%; Building Investment, 4.4%; Business Investment, 4.0%; Consumer Nondurables, 4.2%; and Consumer Durables, 1.1%. Taxable sales make up an estimated 40-45% of all retail sales.

Category	2018	2019	2020	2021	2022	2023	2024	2025
Autos & Accessories	\$955.9	\$1,012.3	\$949.5	\$1,144.8	\$1,238.5	\$1,272.5	\$1,319.1	\$1,353.4
Consumer Durables	\$262.0	\$264.1	\$256.6	\$295.0	\$290.0	\$276.6	\$272.1	\$267.3
Tourism & Recreation	\$989.2	\$1,036.7	\$834.7	\$1,135.8	\$1,258.5	\$1,340.9	\$1,367.3	\$1,420.6
Consumer Nondurables	\$1,665.3	\$1,753.5	\$1,585.1	\$1,823.6	\$1,903.2	\$1,895.2	\$1,933.2	\$1,933.3
Building Investment	\$385.0	\$409.6	\$438.7	\$561.3	\$551.9	\$534.1	\$549.2	\$527.2
Business Investment	\$762.3	\$859.8	\$902.5	\$1,033.8	\$1,151.8	\$1,180.2	\$1,203.7	\$1,076.5
TOTAL	\$5,019.7	\$5,336.1	\$4,967.1	\$5,994.3	\$6,393.8	\$6,499.6	\$6,644.6	\$6,578.4

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

Source: Florida Department of Revenue; Florida Legislature's 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

The Consumer Price Index for all Urban Consumers (cost of living) in 2025 was 2.2%, down from 2.9% in 2024. The annual CPI for the South region in 2025 was 2.2%.

Year	US City Average	Annual % Change, US City Average	South Region Average*	Annual % Change, South Region Average
1999	166.6	2.2%	162.0	2.0%
2000	172.2	3.4%	167.2	3.2%
2001	177.1	2.8%	171.1	2.3%
2002	179.9	1.6%	173.3	1.3%
2003	184.0	2.3%	177.3	2.3%
2004	188.9	2.7%	181.8	2.5%
2005	195.3	3.4%	188.3	3.6%
2006	201.6	3.2%	194.7	3.4%
2007	207.3	2.8%	200.4	2.9%
2008	215.3	3.8%	208.7	4.1%
2009	214.5	-0.4%	207.8	-0.4%
2010	218.1	1.6%	211.3	1.7%
2011	224.9	3.2%	218.6	3.4%
2012	229.6	2.1%	223.2	2.1%
2013	233.0	1.5%	226.7	1.6%
2014	236.7	1.6%	230.6	1.7%
2015	237.0	0.1%	230.1	-0.2%
2016	240.0	1.3%	232.7	1.1%
2017	245.1	2.1%	237.6	2.1%
2018	251.1	2.4%	242.7	2.2%
2019	255.7	1.8%	246.3	1.5%
2020	258.8	1.2%	248.6	1.0%
2021	270.9	4.7%	261.3	5.1%
2022	292.7	8.0%	283.7	8.6%
2023	304.7	4.1%	296.4	4.5%
2024	313.7	2.9%	305.2	3.0%
2025	321.9	2.6%	312.0	2.2%

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

*The South region is comprised of Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.

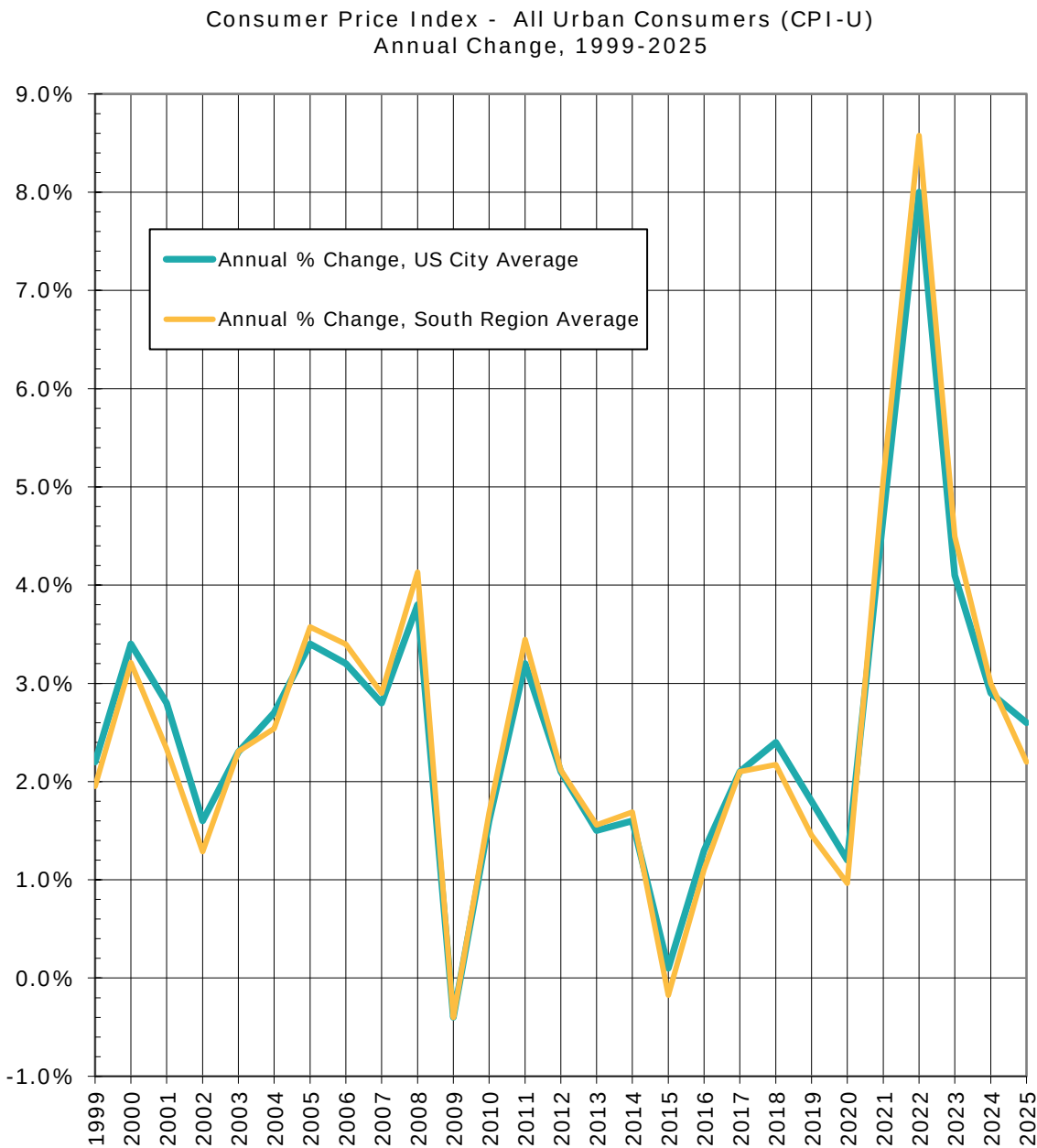


Economic Factors

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Economic Factors

C2ER Annual Cost of Living Index

Trend: In 2025, the Tallahassee urban area captured an overall composite index of 94.3, or 5.7% 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. Starting in 2023, C2ER has partnered with Datasembly, provider of the broadest set of standard metrics for tracking and understanding pricing, promotion, and assortment trends in the grocery industry. The C2ER grocery index is drawing data from over 320 million grocery prices derived from 1.5 trillion historical data points collected across the country to generate the most accurate data possible. This research tool allows OEV to make accurate cost of living comparisons between Tallahassee-Leon County and any of the 283 other participating urban areas across the United States.

Urban Area	All Items	Groceries	Housing	Utilities	Transportation	Healthcare	Misc. Goods & Services
Baton Rouge, LA	89.7	97.0	78.2	72.0	90.1	87.7	101.2
Columbia, SC	89.8	98.7	70.2	100.5	91.2	100.5	98.5
Greenville, SC	90.6	98.6	73.2	88.9	97.3	108.2	98.5
Jackson, MS	91.0	97.2	82.3	82.3	85.7	99.0	98.2
Montgomery, AL	91.2	100.5	82.5	111.0	89.2	81.7	91.5
Columbus, OH	93.0	100.9	93.1	100.2	92.4	80.8	89.6
Lincoln, NE	93.7	97.7	77.0	94.1	97.3	103.3	104.1
Tallahassee, FL	94.3	99.9	85.9	82.6	98.6	104.1	99.5
Little Rock, AR	94.8	96.8	81.4	89.7	92.1	90.5	108.4
Raleigh, NC	94.8	100.5	87.5	89.6	88.9	116.4	98.4
Richmond, VA	95.1	99.0	85.3	96.3	98.9	89.3	101.4
Austin, TX	95.7	94.9	96.8	99.4	95.4	90.5	95.0
Pensacola, FL	98.2	100.9	89.5	93.8	98.0	100.0	105.5
Nashville, TN	98.5	99.9	102.1	97.2	90.5	91.4	98.0
Boise, ID	103.2	102.5	105.4	73.0	107.2	105.0	108.0
Madison, WI	103.9	99.9	108.5	96.3	98.8	107.5	104.4
Albany, NY	107.7	101.1	113.6	97.0	105.0	102.7	109.5
Sacramento, CA	123.8	104.9	137.5	164.1	134.5	106.3	109.8

Note: Gainesville, Lansing, and Trenton did not have annual composite scores for 2025.

Source: Council for Community and Economic Research (C2ER)

Cost of Living Index: Comparative Communities



Cost of Living Index: Other Capital Communities





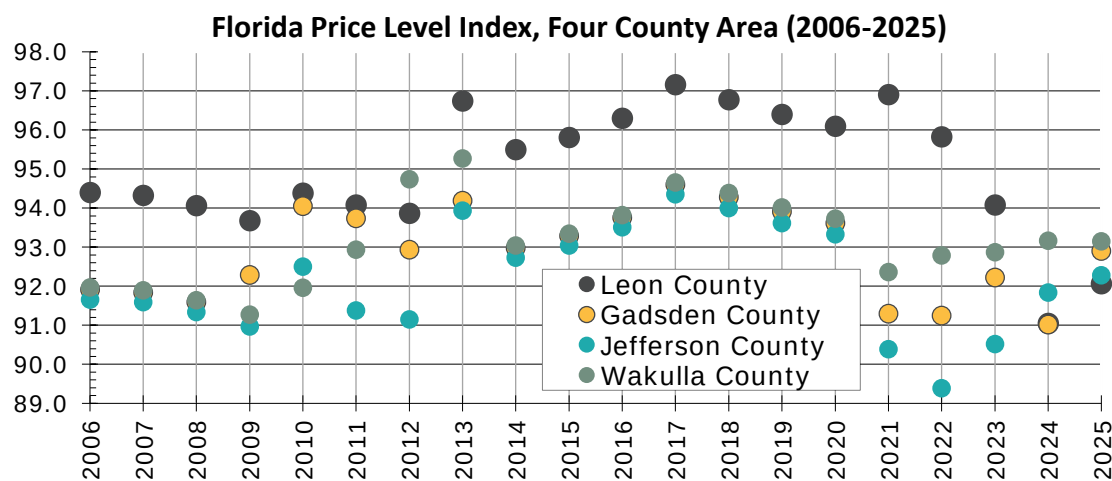
Economic Factors

Florida Price Level Index

Trend: The Florida Price Level Index (FPLI) was established by the Legislature as the basis for the District Cost Differential (DCD) in the Florida Education Finance Program. It represents the costs of hiring comparable personnel across school districts. Extensive data on wages is used to estimate the relative cost of hiring comparable workers among Florida's 67 counties in a given year. The median Floridian, ranked by 2025 county FPLI, lives in Orange County, with an index value of 100.56. That is, less than half of Floridians live in counties with index values greater than 100.56, less than half live in counties with index values less than 100.56, and the rest live in Orange 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
2021	96.91	91.30	90.39	92.36
2022	95.83	91.25	89.39	92.79
2023	94.08	92.22	90.52	92.87
2024	91.05	91.02	91.84	93.17
2025	92.07	92.90	92.28	93.15

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.





Economic Factors

Bank Deposits:

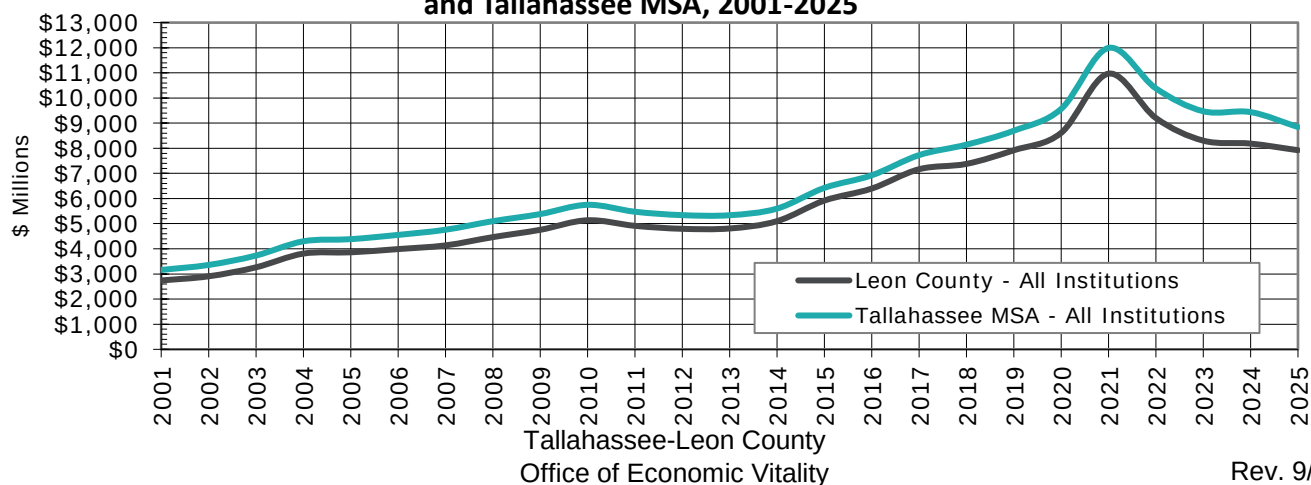
FDIC Summary of Deposits

Trend: About \$7.9 billion in deposits were held in Leon County in FDIC-insured institutions as of June 30, 2025. Total Leon County deposits increased 27% between 2020 and 2021, decreased 16% from 2021 to 2022, and decreased another 14% from 2022 to 2025. 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 2001-2025, Tallahassee metro area bank deposits accounted for about 1.3% of State total.

As of June 30	Leon County - All Institutions			Tallahassee MSA - All Institutions			Florida - All Institutions		
	Institutions	Offices	Deposits (\$ millions)	Institutions	Offices	Deposits (\$ millions)	Institutions	Offices	Deposits (\$ millions)
2001	13	68	\$2,740	15	86	\$3,159	349	4,667	\$222,797
2002	14	67	\$2,905	16	85	\$3,357	349	4,626	\$242,821
2003	14	69	\$3,263	16	86	\$3,731	352	4,732	\$268,174
2004	14	76	\$3,809	15	90	\$4,298	353	4,897	\$300,961
2005	14	80	\$3,860	15	95	\$4,383	349	5,081	\$342,821
2006	14	81	\$3,989	16	98	\$4,553	365	5,310	\$363,415
2007	14	83	\$4,135	16	100	\$4,758	376	5,600	\$373,711
2008	19	96	\$4,464	20	111	\$5,099	381	5,772	\$380,281
2009	20	96	\$4,755	21	111	\$5,381	368	5,820	\$400,979
2010	19	95	\$5,136	20	110	\$5,750	322	5,666	\$409,894
2011	18	92	\$4,914	18	105	\$5,475	299	5,616	\$411,157
2012	18	93	\$4,796	18	106	\$5,339	281	5,601	\$423,908
2013	17	82	\$4,809	17	93	\$5,336	270	5,548	\$441,108
2014	17	79	\$5,099	17	88	\$5,599	257	5,450	\$462,364
2015	18	78	\$5,918	18	87	\$6,424	244	5,387	\$502,930
2016	16	76	\$6,396	16	85	\$6,923	231	5,294	\$541,660
2017	16	75	\$7,166	16	84	\$7,727	219	5,136	\$563,793
2018	18	76	\$7,378	18	85	\$8,143	202	4,982	\$585,832
2019	18	72	\$7,920	18	83	\$8,698	198	4,816	\$603,555
2020	17	72	\$8,612	17	81	\$9,565	188	4,774	\$710,549
2021	18	71	\$10,969	18	80	\$11,992	183	4,540	\$808,085
2022	18	66	\$9,202	17	75	\$10,382	180	4,340	\$878,074
2023	19	65	\$8,304	19	74	\$9,473	188	4,282	\$833,568
2024	19	63	\$8,186	19	72	\$9,439	188	4,244	\$831,131
2025	19	61	\$7,923	19	70	\$8,843	195	4,259	\$859,235

Source: FDIC, Summary of Deposits

**FDIC Summary of Deposits, Leon County
and Tallahassee MSA, 2001-2025**





Economic Factors

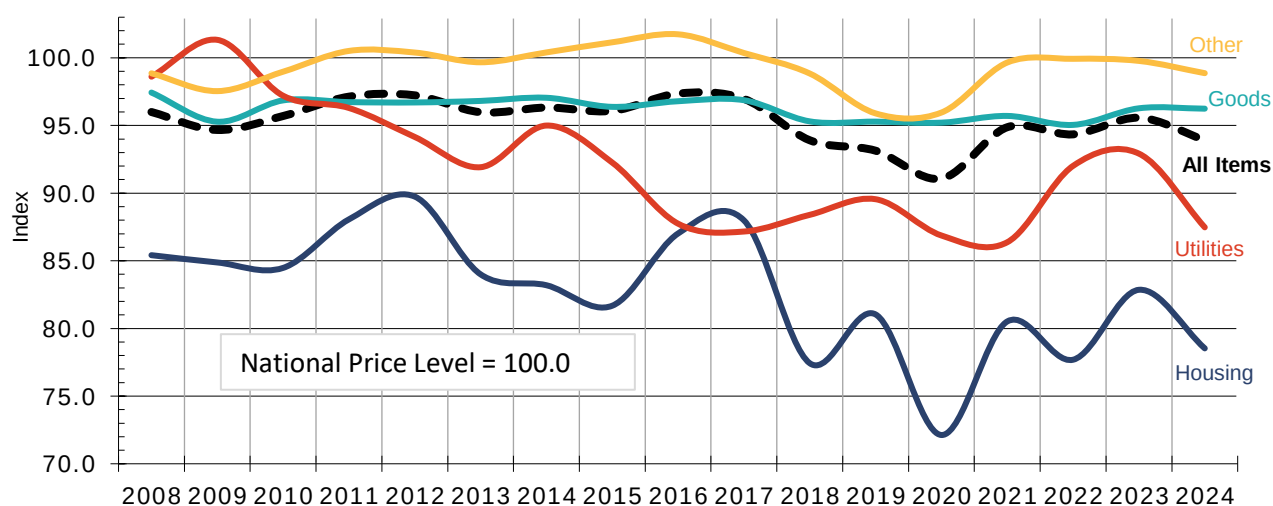
Regional Price Parities

Trend: Regional Price Parities (RPPs) are regional price levels expressed as a percentage of the overall national price level for a given year. The price levels are determined by the average prices paid by consumers for the mix of goods and services consumed in each region. Taking the ratio of RPPs shows the difference in price levels across regions. **All Items:** all the detailed consumption goods and services used to estimate the RPPs. **Goods:** durable and nondurable consumption goods used to estimate RPPs, including apparel, education, food, housing, medical, recreation, transportation, and other goods. **Housing:** The ratios of monthly tenant rents to owner-equivalent rents in the CPI housing file are estimated for several types of housing units, from studio apartments to detached houses with three or more bedrooms. The components of these ratios, that is, tenant rents and owner equivalent rents for each housing type, are the weighted geometric means of all the observations in the CPI. **Other:** consumption products used to estimate RPPs, including education, food, housing, medical, recreation, transportation, and other services.

Year	All Items	Goods	Housing	Utilities	Other
2008	96.0	97.4	85.4	98.6	98.9
2009	94.7	95.3	84.9	101.3	97.5
2010	95.7	96.9	84.5	97.2	99.0
2011	97.1	96.7	88.1	96.3	100.5
2012	97.2	96.7	89.7	94.2	100.4
2013	96.0	96.8	84.0	91.9	99.7
2014	96.3	97.0	83.2	95.0	100.4
2015	96.1	96.4	81.7	92.3	101.1
2016	97.4	96.8	87.0	87.7	101.7
2017	97.0	96.9	88.0	87.2	100.4
2018	93.9	95.3	77.4	88.4	98.8
2019	93.1	95.3	81.0	89.6	95.9
2020	91.1	95.2	72.1	86.9	96.0
2021	94.9	95.7	80.5	86.4	99.7
2022	94.3	95.0	77.7	92.0	99.9
2023	95.6	96.3	82.9	92.9	99.8
2024	93.9	96.2	78.5	87.5	98.9

Source: U.S. Bureau of Economic Analysis, MARPP Regional Price Parities by MSA

Regional Price Parities for Tallahassee MSA





Economic Factors

Total Quantity Indexes for Real GDP

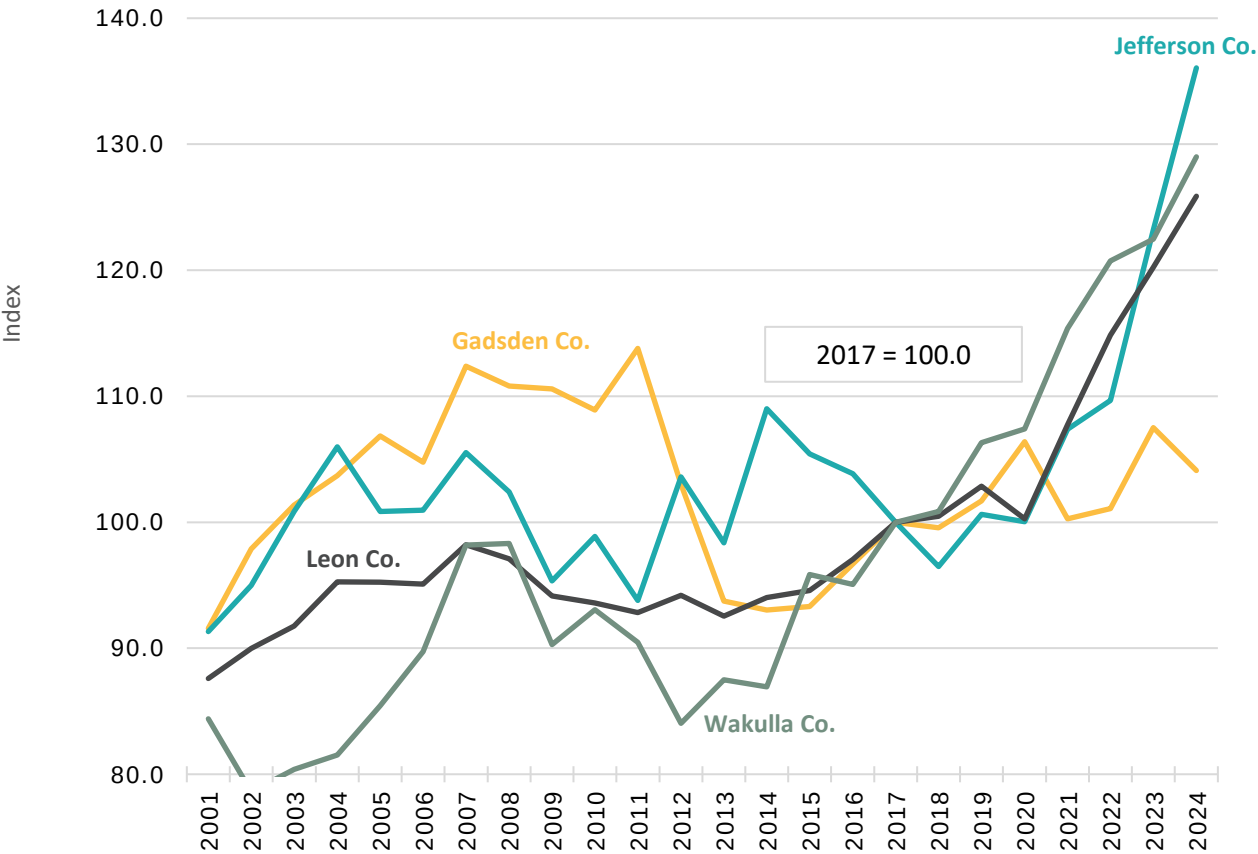
Trend: Total Quantity Indexes for Real GDP includes all Private Industries and Government. A chained-type index is based on the linking (chaining) of indexes to create a time series. These annual chained-type indices are used in BEA's national income and product accounts and calculated using the weights 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			
	Gadsden Co.	Jefferson Co.	Leon Co.	Wakulla Co.
2001	91.6	91.3	87.6	84.4
2002	97.9	95.0	90.0	78.6
2003	101.4	100.9	91.8	80.4
2004	103.7	106.0	95.3	81.5
2005	106.8	100.8	95.2	85.4
2006	104.8	101.0	95.1	89.7
2007	112.4	105.5	98.2	98.2
2008	110.8	102.4	97.1	98.3
2009	110.6	95.3	94.1	90.3
2010	108.9	98.9	93.6	93.1
2011	113.8	93.8	92.8	90.5
2012	103.0	103.6	94.2	84.0
2013	93.7	98.4	92.5	87.5
2014	93.0	109.0	94.0	86.9
2015	93.3	105.4	94.6	95.9
2016	96.7	103.8	97.1	95.1
2017	100.0	100.0	100.0	100.0
2018	99.6	96.5	100.5	100.9
2019	101.7	100.6	102.9	106.3
2020	106.4	100.0	100.3	107.4
2021	100.3	107.4	107.7	115.4
2022	101.1	109.7	114.9	120.7
2023	107.5	123.2	120.2	122.5
2024	104.1	136.1	125.9	129.0

Note: Data for 2001 to 2024 indexed to 2017 = 100.

Source: U.S. Bureau of Economic Analysis, CAGDP8 Chain-type Quantity Indexes for Real GDP by County

Total Quantity Indexes for Real GDP, Tallahassee MSA





Economic Factors

Capital Accumulation

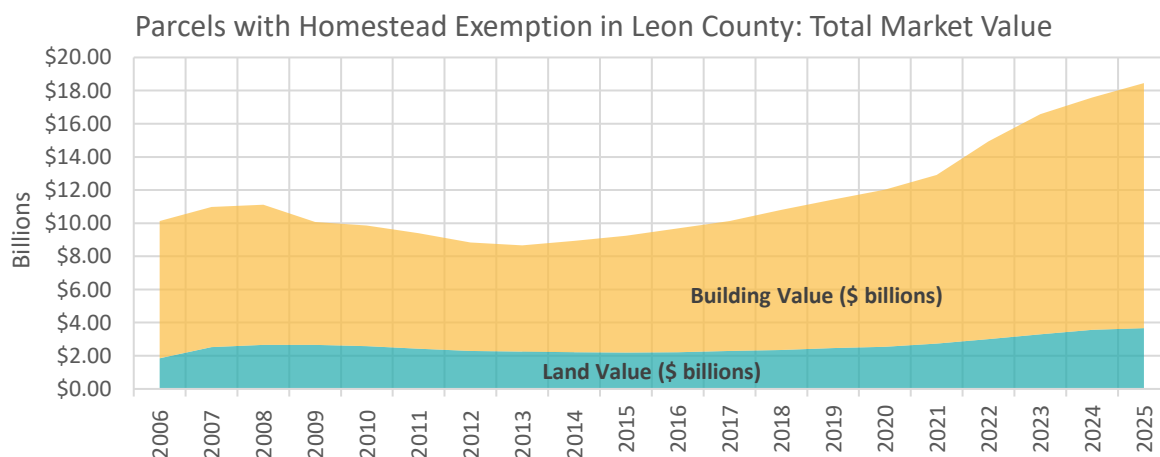
Homestead Exemption in Leon County

Trend: Residential property investment is a widespread method for local capital accumulation. Since 2020, acreage with homestead exemption has averaged around 62,300 acres. Building value accounted for an average of 80% of total market value among homestead exempted properties since 2020. During 2020-2025, average annual growth in total market value for homestead exempted properties was around 8%.

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
2021	57,319	61,826	\$2.74	\$10.17	\$44,317	\$95.65
2022	58,226	62,503	\$3.00	\$11.95	\$47,947	\$110.69
2023	58,836	62,958	\$3.29	\$13.29	\$52,322	\$121.69
2024	59,334	63,327	\$3.57	\$14.02	\$56,352	\$123.42
2025	59,405	62,268	\$3.67	\$14.79	\$58,907	\$128.63

*Acreage based on <0.2% condominium homesteads.

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





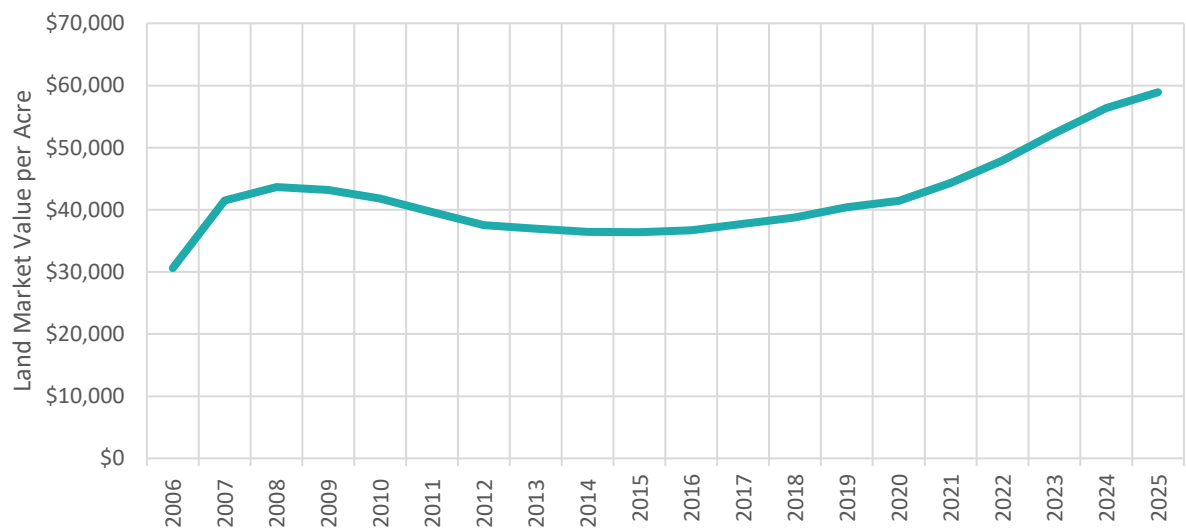
Economic Factors

Capital Accumulation

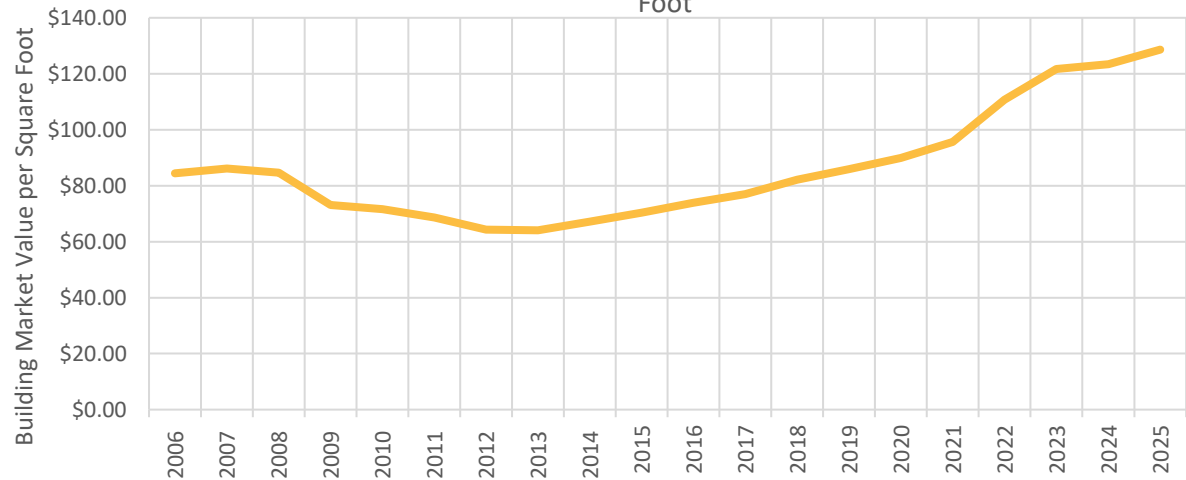
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Homestead Exemption Parcels in Leon County: Land Market Value per Acre



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





Education

Higher Education Institutions:

Enrollment

Trend: Combined enrollment for Florida State University, Florida A&M University, and Tallahassee State College has averaged nearly 66,000 since 2020.

Year	Florida State University	Florida A&M University	Tallahassee State College	Total Enrollment
1960	9,019	2,961	—	11,980
1970	16,992	4,500	2,100	23,592
1980	22,424	5,246	3,663	31,333
1985	21,578	4,919	5,289	31,786
1990	28,327	8,344	8,927	45,598
1991	28,607	9,196	9,894	47,697
1992	28,512	9,487	9,776	47,775
1993	28,669	9,876	9,390	47,935
1994	29,630	10,084	9,902	49,616
1995	30,268	10,306	10,067	50,641
1996	30,264	10,667	9,737	50,668
1997	30,519	10,991	10,533	52,043
1998	31,193	11,828	10,563	53,584
1999	33,327	12,082	10,736	56,145
2000	34,477	12,126	10,816	57,419
2001	35,462	12,316	11,146	58,924
2002	36,683	12,464	11,666	60,813
2003	37,328	13,013	12,369	62,710
2004	38,886	13,067	12,775	64,728
2005	39,652	12,154	13,029	64,835
2006	40,474	11,907	12,732	65,113
2007	41,065	11,562	13,776	66,403
2008	39,136	11,857	14,005	64,998
2009	40,255	12,274	14,526	67,055
2010	40,838	13,284	14,739	68,861
2011	41,710	13,204	15,090	70,004
2012	41,301	12,057	14,237	67,595
2013	41,477	10,743	13,509	65,729
2014	41,773	10,241	13,049	65,063
2015	41,473	9,928	12,445	63,846
2016	41,867	9,619	12,200	63,686
2017	41,900	9,913	11,782	63,595
2018	41,717	10,021	11,914	63,652
2019	42,876	9,617	11,683	64,176



Education

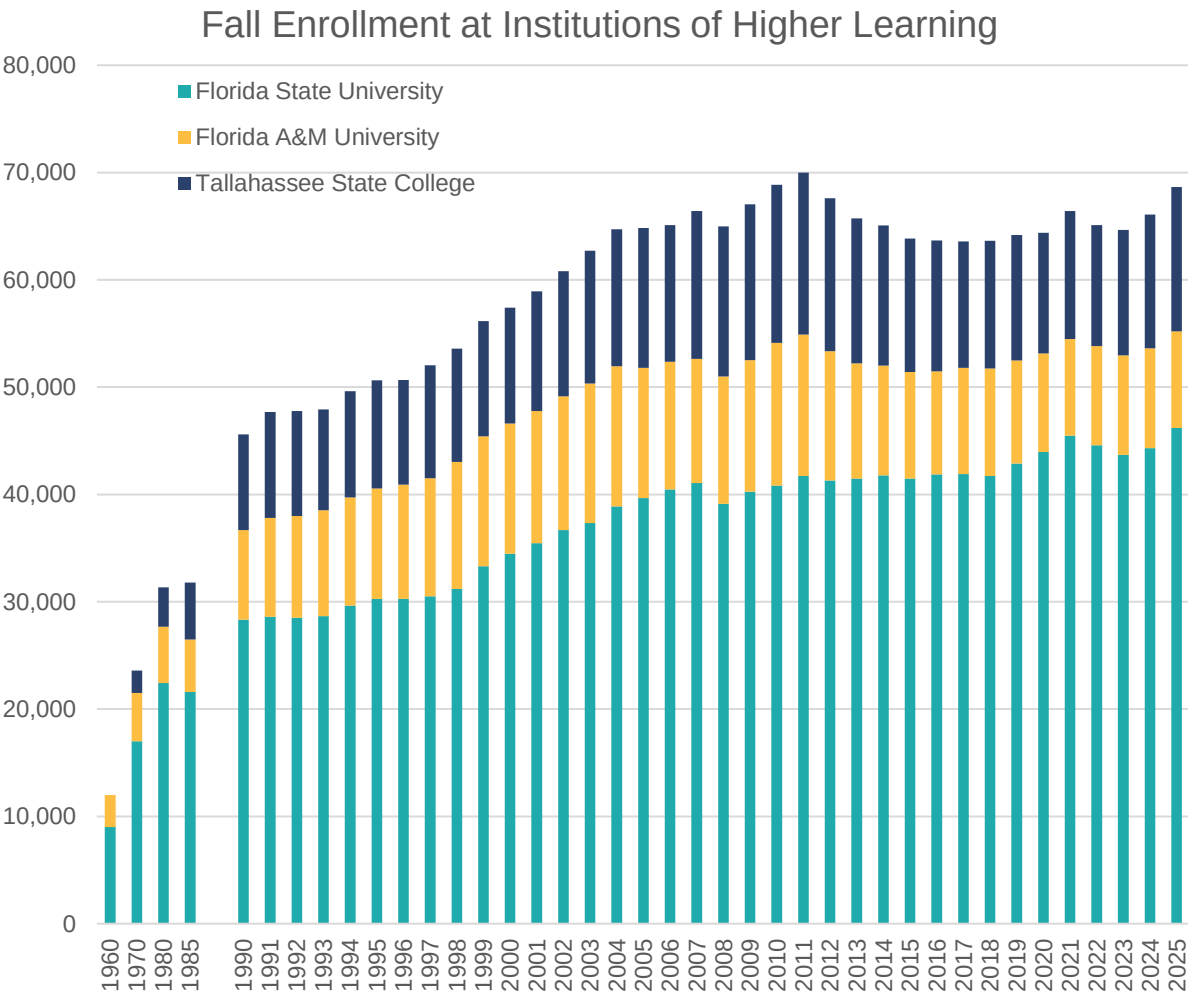
Higher Education Institutions:

Enrollment

Trend: Combined enrollment for Florida State University, Florida A&M University, and Tallahassee State College has averaged nearly 66,000 since 2020.

Year	Florida State University	Florida A&M University	Tallahassee State College	Total Enrollment
2020	43,953	9,179	11,245	64,377
2021	45,493	8,994	11,935	66,422
2022	44,597	9,228	11,266	65,091
2023	43,701	9,269	11,699	64,669
2024	44,308	9,309	12,455	66,072
2025	46,184	9,019	13,458	68,661

Sources: National Center for Education Statistics, Integrated Postsecondary Education Data System; Office of Institutional Research, Budget & Analysis Dept, Florida State University; Office of Institutional Research, Florida A&M University; Institutional Research Office, Tallahassee State College





Education

Higher Education Institutions:

Enrollment by Level and Full-Time Status

Trend: Between 1989 and 2024, the proportion of full-time students rose from 69% to 78% of the total. The proportion of graduate students rose from 13% to 19% of the total during those same years.

Year	Undergraduate Total	Graduate Total	Full Time	Part Time
1989	42,630	6,279	33,629	15,280
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
2020	53,117	12,808	50,556	14,369
2021	55,060	13,236	52,233	14,369
2022	54,296	12,731	51,666	15,361
2023	54,121	12,486	52,016	14,591
2024	55,245	12,592	53,070	14,767

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

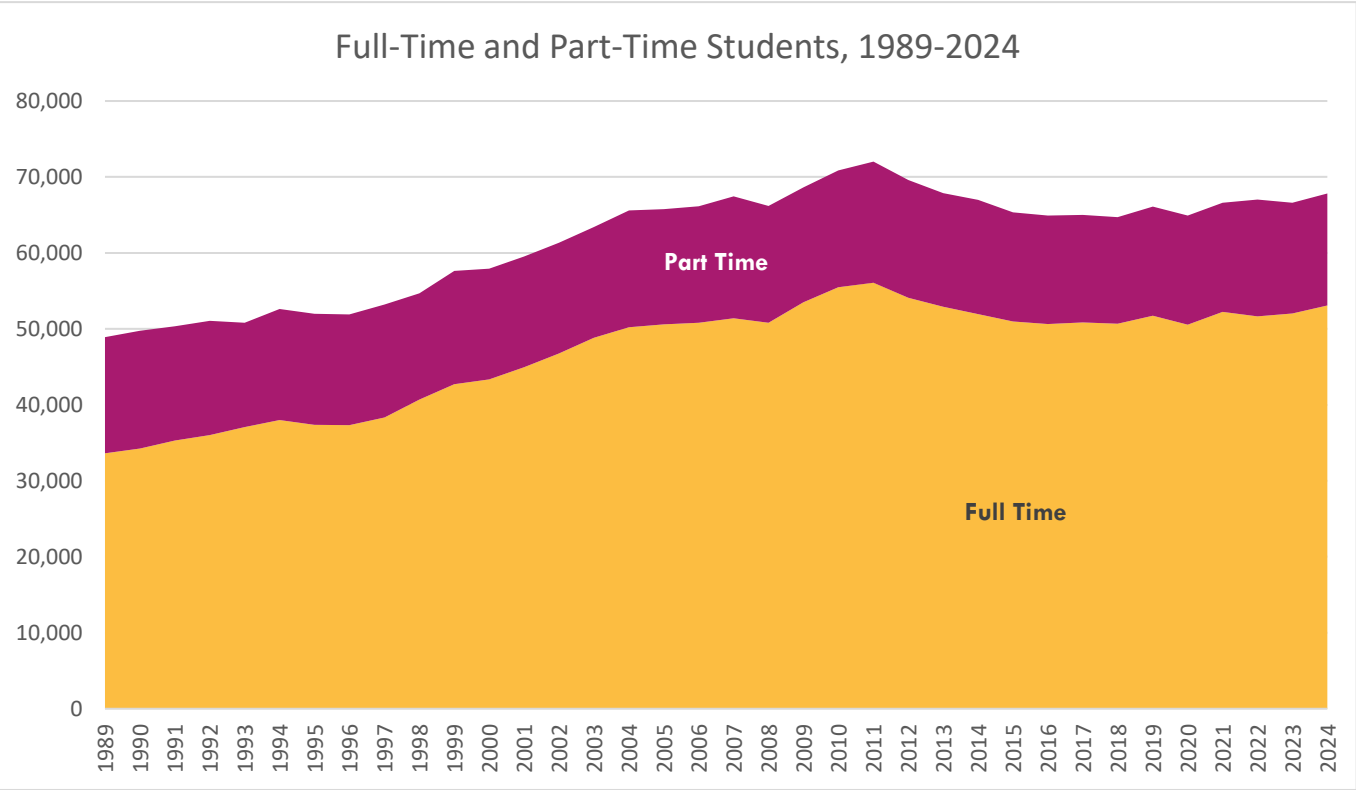
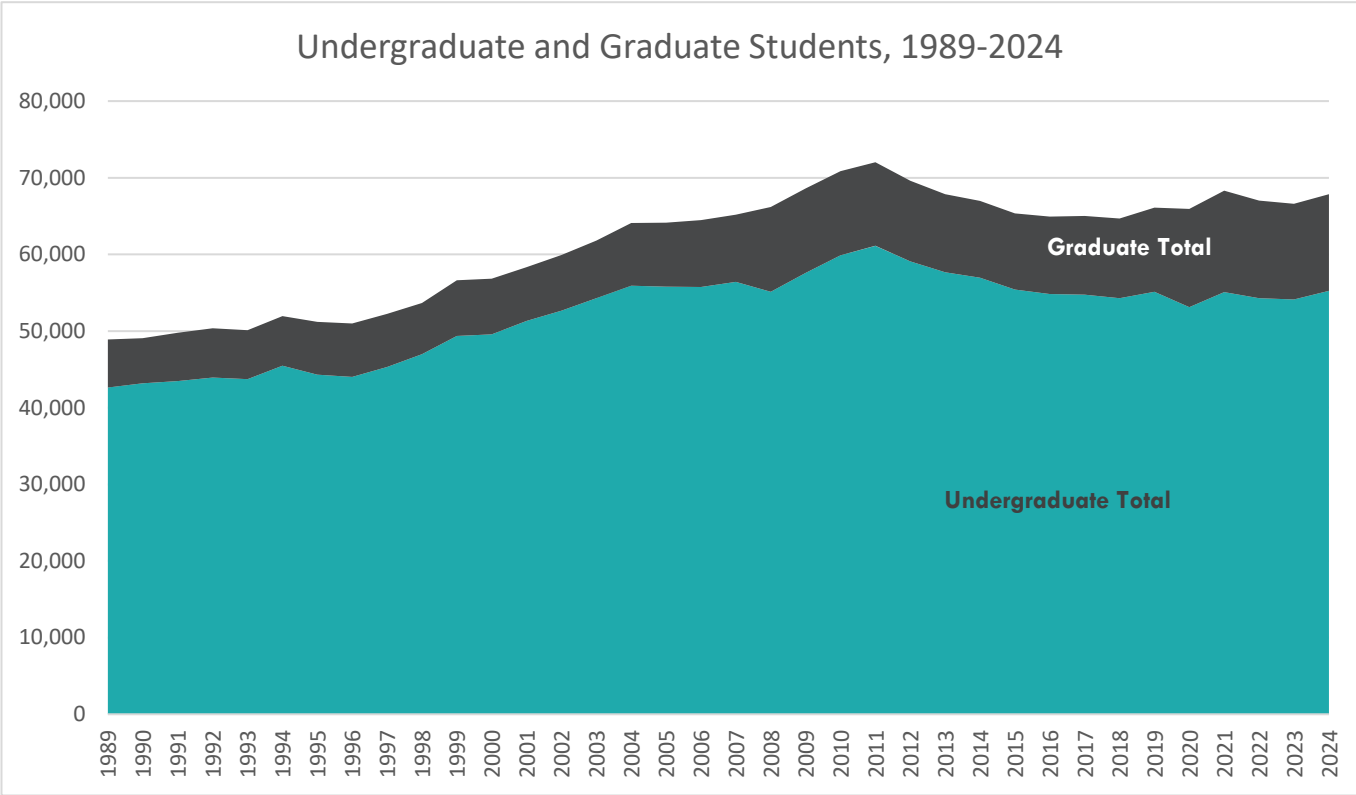
Source: US Department of Education, Institute of Education Sciences, National Center for Education Statistics



Education

Higher Education Institutions:

Enrollment by Level and Full-Time Status





Education

Higher Education Institutions: Degrees Conferred

Trend: Between 2015 and 2024, on average nearly 18,700 postsecondary degrees were conferred annually by higher education institutions (17,000 baccalaureate level and higher, 1,600 below baccalaureate level), including an average of around 1,100 doctoral degrees per year.

Baccalaureate Level and Above

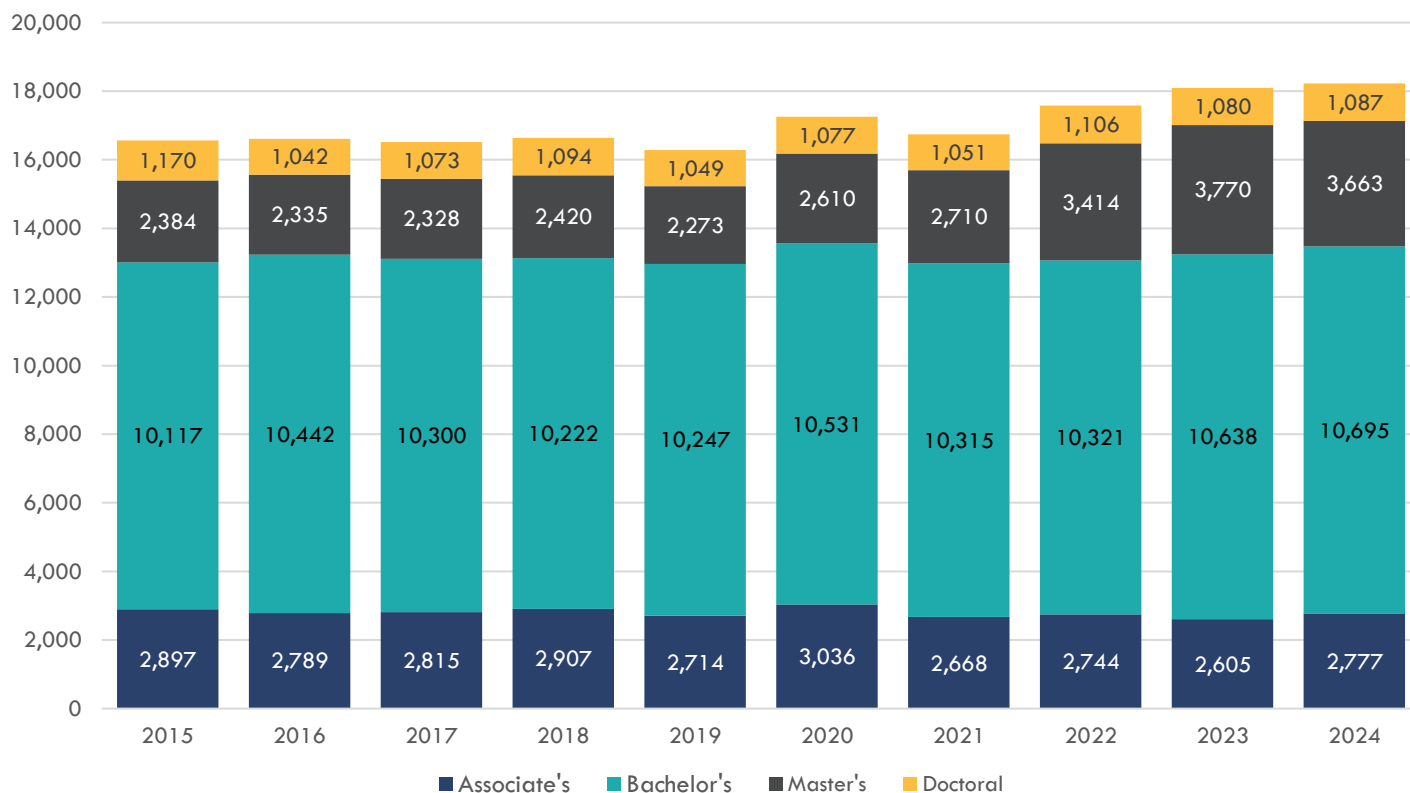
School	Degree Type	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Flagler College-Tallahassee	Bachelor's	189	140	134	173	163	145	N/A	N/A	N/A	N/A
Florida A&M University	Associate's	67	54	48	40	43	30	25	43	16	20
	Bachelor's	1,507	1,676	1,555	1,258	1,444	1,520	1,466	1,567	1,466	1,587
	Master's	231	271	252	303	311	285	303	346	235	281
	Doctoral*	353	326	327	340	319	331	304	328	266	250
Florida State University	Associate's	177	192	190	183	187	159	187	185	184	154
	Bachelor's	8,421	8,626	8,611	8,791	8,640	8,866	8,827	8,730	9,140	9,090
	Master's	2,153	2,064	2,076	2,117	1,962	2,325	2,407	3,068	3,535	3,382
	Doctoral*	817	716	746	754	730	746	747	778	814	837
Tallahassee State College	Associate's	2,523	2,543	2,577	2,684	2,484	2,847	2,456	2,516	2,405	2,603
	Bachelor's						19	22	24	32	18
Year Total		16,438	16,608	16,516	16,643	16,283	17,273	16,744	17,585	18,093	18,222

* Includes research/scholarship and professional practice degrees.

Note: Separate data for Flagler College-Tallahassee discontinued after 2020.

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

Total Degrees Awarded by Type, Baccalaureate Level and Above, 2015-2024





Education

Higher Education Institutions:
Degrees Conferred

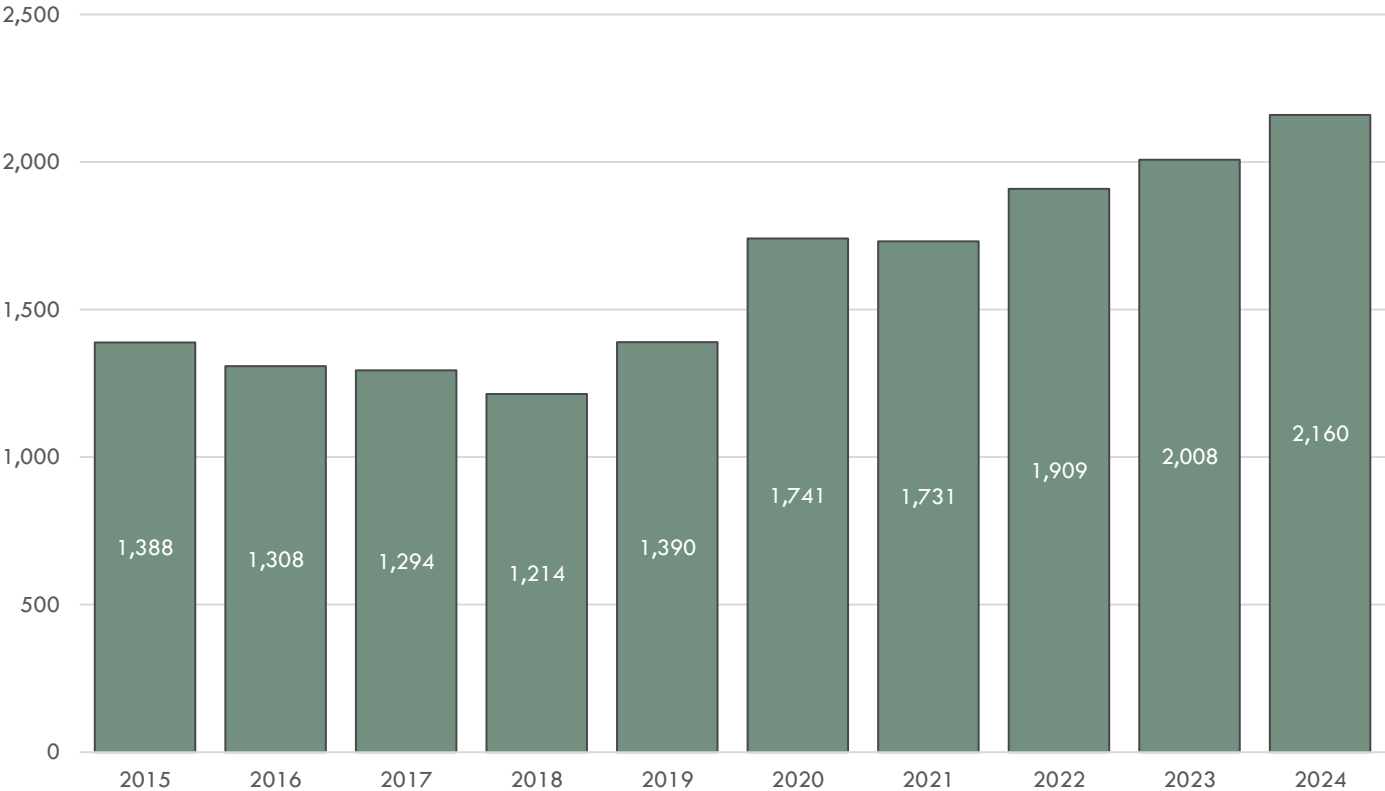
Trend: Between 2015 and 2024, on average nearly 18,700 postsecondary degrees were conferred annually by higher education institutions (17,000 baccalaureate level and higher, 1,600 below baccalaureate level), including an average of around 1,100 doctoral degrees per year.

Below Baccalaureate Level

School	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Aveda Institute-Tallahassee	350	330	350	343	356	395	516	611	632	619
Gadsden Technical College				21	20	19	5	19	31	25
Lively Technical College	313	318	277	247	269	437	451	645	615	703
North Florida Cosmetology Institute	106	92	91	95	89	104	98	113	91	68
Tallahassee State College	619	568	576	508	656	770	641	511	622	735
World Class Academy of Beauty Careers						16	20	10	17	10
Year Total	1,388	1,308	1,294	1,214	1,390	1,741	1,731	1,909	2,008	2,160

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

Total Degrees Awarded, Below Baccalaureate Level, 2015-2024





Education

Public Schools:

Enrollment

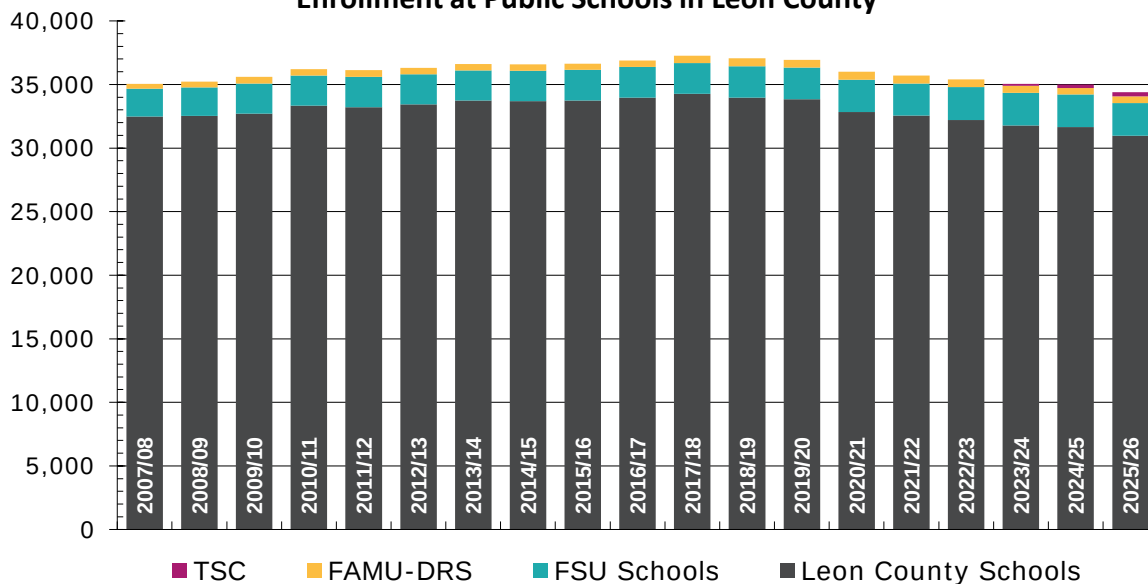
Trend: Public school enrollment has averaged around 36,000 over the past ten years. Enrollment decreased about 6% between 2019/20 and 2025/26.

Year	FAMU-DRS	FSU Schools	TSC	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	-2.9%
2021/22	616	2,524		32,562	35,702	-3.7%
2022/23	621	2,574		32,212	35,407	-0.8%
2023/24	569	2,571	141	31,769	35,050	-1.0%
2024/25	519	2,561	273	31,645	34,998	-0.1%
2025/26	532	2,563	346	30,964	34,405	-1.7%

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

Source: Florida Department of Education

Enrollment at Public Schools in Leon County





Education

Public Schools:

Graduation Rate

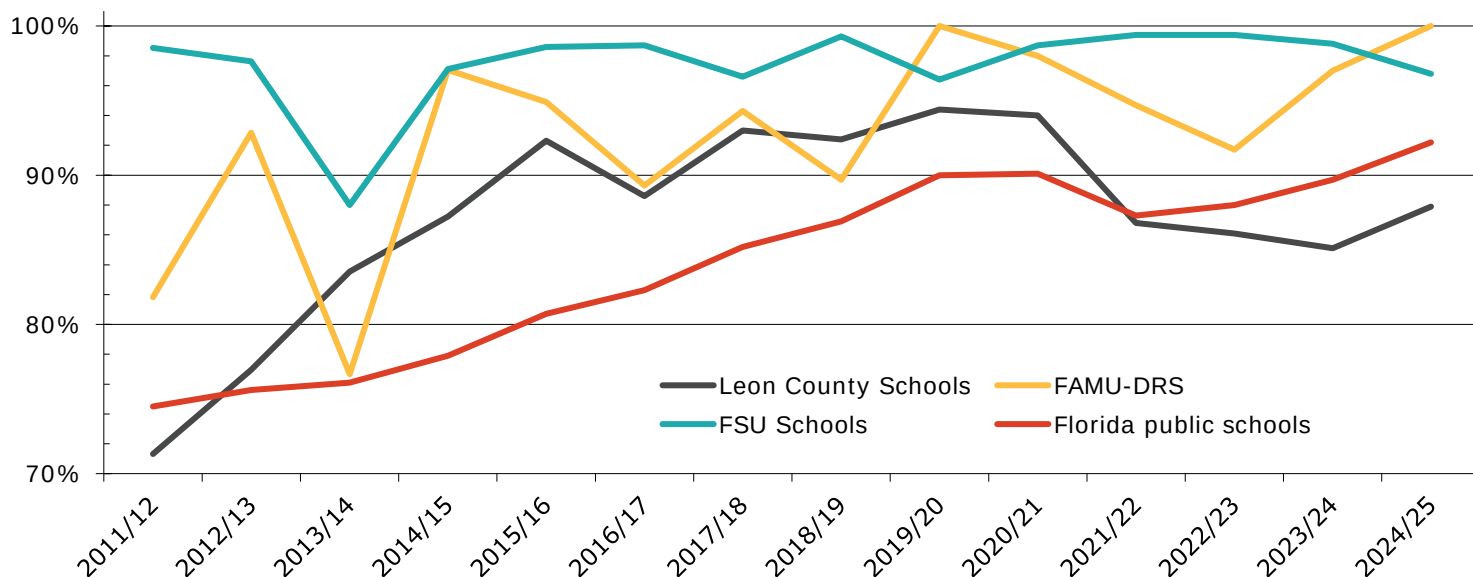
Trend: The graduation rate for Leon County Schools surpassed the State rate from 2012/13 to 2020/21. FAMU-DRS and FSU Schools typically have higher graduation rates than the State's overall rate.

Year	Leon County Schools		FAMU-DRS		FSU Schools		TSC		Florida public schools	
	Graduates	Percent Graduates	Graduates	Percent Graduates	Graduates	Percent Graduates	Graduates	Percent Graduates	Graduates	Percent Graduate
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	99.3%			184,509	86.9%
2019/20	2,161	94.4%	31	100.0%	163	96.4%			188,088	90.0%
2020/21	2,138	94.0%	50	98.0%	151	98.7%			185,758	90.1%
2021/22	2,063	86.8%	38	94.7%	157	99.4%			180,228	87.3%
2022/23	1,968	86.1%	33	91.7%	166	99.4%			183,416	88.0%
2023/24	1,937	85.1%	32	97.0%	161	98.8%			194,966	89.7%
2024/25	1,987	87.9%	51	100.0%	153	96.8%	12	100.0%	203,541	92.2%

Note: Graduation rate determined as percent of cohort. FAMU-DRS, FSU Schools, and TSC are public schools sponsored by their respective institutions and operated by the State of Florida.

Source: Florida Department of Education

Graduation Rate at Public Schools





Education

Public Schools:

School Grades

Trend: Between 2022 and 2026, 55% of all public schools in Leon County earned a grade of A or B. The 2022-2023 school and district grades incorporate results from new performance standards that serve as an informational baseline. Pursuant to FDOE Emergency Order No. 2021-EO-02, only schools for which an opt-in request was submitted by the school district superintendent or charter school governing board had a letter grade assigned for the 2020-2021 school year. 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	2026 Grade	2025 Grade	2024 Grade	2023 Grade	2022 Grade	2021 Grade	2019 Grade	2018 Grade	2017 Grade	2016 Grade	2015 Grade	2014 Grade	2013 Grade	2012 Grade	2011 Grade
Amos P. Godby High School	I	C	C	D	I		C	C	C	C	B	C	C	B	C
Apalachee Elementary School	C	C	D	D	D		C	C	C	C	C	B	C	D	C
Astoria Park Elementary School	B	C	C	D	D		C	D	C	D	D	C	C	B	A
Bond Elementary School	A	B	B	B	B	C	D	D	C	C	F	D	D	C	C
Buck Lake Elementary School	A	A	A	A	A		A	A	A	A	A	A	A	A	A
Canopy Oaks Elementary School	C	B	C	C	C		B	C	B	C	B	C	B	A	A
Chaires Elementary School	A	A	B	B	B		C	B	A	B	B	A	B	A	A
Deerlake Middle School	A	A	A	A	A		A	A	A	A	A	A	A	A	A
Desoto Trail Elementary School	A	B	A	A	A		A	A	A	A	A	A	A	A	A
Elizabeth Cobb Middle School	A	B	C	C	C		B	B	B	B	B	A	B	A	A
Fairview Middle School	A	C	B	C	C		B	C	C	B	A	B	B	B	B
Fort Braden School	C	C	D	C	C		C	C	C	C	C	B	C	C	B
Frank Hartsfield Elementary School	B	C	C	D	D		C	D	C	D	D	D	C	B	C
Gilchrist Elementary School	A	A	A	A	A		A	A	A	A	A	A	A	A	A
Griffin Middle School	C	D	C	C	C		D	C	C	C	D	C	D	C	C
Hawks Rise Elementary School	A	A	A	A	A		A	A	A	A	A	A	A	A	A
J Michael Conley Elementary School	A	C	C	C	C		C	C	B	C	B	C	B	A	A
James Rickards High School	C	C	C	C	C		B	C	C	D	C	C	C	C	B
John G Riley Elementary School	C	B	C	C	D		D	C	D	C	D	D	C	C	B
Kate Sullivan Elementary School	B	B	B	B	C		B	C	B	C	B	B	B	A	B
Killearn Lakes Elementary School	A	A	A	A	A		A	A	A	A	A	A	A	A	A
Lawton Chiles High School	A	A	A	A	A		A	A	A	A	A	A	A	A	A
Leon County Virtual School Franchise	B	B	A	I	I		A	A	A	A	A				
Leon High School	B	B	B	B	A		A	A	A	B	A	B	B	A	B
Lincoln High School	B	C	C	B	B		B	B	B	C	A	A	B	A	B
Oak Ridge Elementary School	C	D	C	D	C		C	D	D	D	F	C	D	C	B
Pineview Elementary School	B	B	A	C	B		C	F	C	D	C	C	C	B	C
R. Frank Nims Middle School	D	C	B	I	C		C	C	C	D	D	C	D	D	C
Raa Middle School	B	B	B	C	C		C	B	B	B	B	A	C	B	A
Roberts Elementary School	A	A	A	A	A		A	A	A	A	A	A	A	A	B
Ruediger Elementary School	I	A	C	C	C		C	C	C	C	D	C	C	B	C
Sabal Palm Elementary School	B	A	D	C	C		B	C	C	C	D	D	C	C	B
SAIL	A	A	A	A	B		B	C	B	B	A		A	A	A
Sealey Elementary School	A	C	C	C	C		B	C	C	B	B	C	B	A	B
Springwood Elementary School	B	B	C	D	D		C	D	C	C	C	B	C	C	B
Swift Creek Middle School	A	A	A	A	B		A	A	A	A	A	A	A	A	A
Tallahassee Classical School	B	C	C	C	C										
Tallahassee School Of Math & Sciences	B	C	C	B	B		A	B	B	C					
The School Of Arts & Sciences Centre	B	A	C	B	B	A	B	A	A						
The School of Arts and Sciences on Thomasville	A	A	A	A	B	A	A	A	A	A	A	A	A	A	A
W T Moore Elementary School	B	C	B	B	C		C	B	B	C	B	B	B	A	B
William J Montford III Middle School	A	A	A	A	B		A	A	A	A	A	A	A	A	A
Woodville School	C	C	C	C	C		C	C	C	A	C	C	C	B	A

District*	2026 Grade	2025 Grade	2024 Grade	2023 Grade	2022 Grade	2021 Grade	2019 Grade	2018 Grade	2017 Grade	2016 Grade	2015 Grade	2014 Grade	2013 Grade	2012 Grade	2011 Grade
FAMU-DRS	B	C	C	C	C		C	C	C	B	C	C	C	D	C
FSU Schools	A	A	A	A	A	A	A	A	A	A	A	A	A	A	A
Leon County Schools	B	B	B	B	B		B	B	B	B	A	B	C	B	A
Tallahassee Collegiate Academy	A	A	A												

*FAMU-DRS, FSU Schools, and Tallahassee Collegiate Academy are public schools sponsored by their respective institutions and operated by the State of Florida.

Source: Florida Department of Education



Education

Higher Education Institutions: Graduation Rate

Trend: During 2015-2024, an average of nearly 7,100 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	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Aveda Institute-Tallahassee	67	100	82	94	94	130	144	139	139	164
Florida A&M University	913	1,108	945	762	642	734	856	766	828	748
Florida State University	4,704	4,769	4,927	4,763	5,061	5,106	5,008	5,252	5,322	5,324
Lively Technical Center	250	256	267	275	313	335	345	349	477	441
North Florida Cosmetology Inst.	49	60	63	58	57	63	57	50	69	64
Tallahassee State College	733	838	801	733	766	793	788	732	854	866
Year Total	6,716	7,131	7,085	6,685	6,933	7,161	7,198	7,288	7,689	7,607

Graduation Rate *

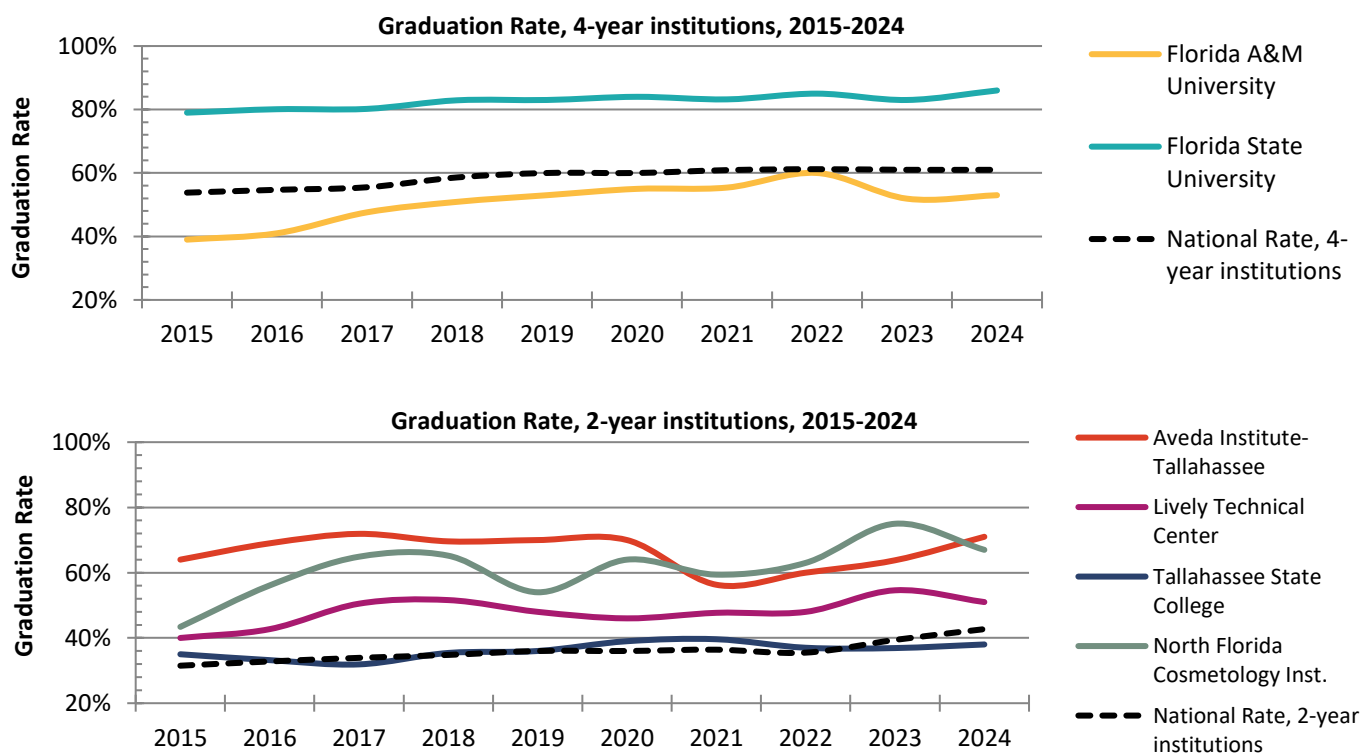
School	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Aveda Institute-Tallahassee	64%	69%	72%	70%	70%	70%	56%	60%	64%	71%
Florida A&M University	39%	41%	48%	51%	53%	55%	55%	60%	52%	53%
Florida State University	79%	80%	80%	83%	83%	84%	83%	85%	83%	86%
Lively Technical Center	40%	43%	51%	52%	48%	46%	48%	48%	55%	51%
North Florida Cosmetology Inst.	43%	56%	65%	65%	54%	64%	59%	63%	75%	67%
Tallahassee State College	35%	33%	32%	35%	36%	39%	40%	37%	37%	38%

National Rate, 4-year institutions 54% 55% 56% 59% 60% 60% 61% 61% 61% 61%

National Rate, 2-year institutions 32% 33% 34% 35% 36% 36% 36% 36% 39% 43%

* 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*

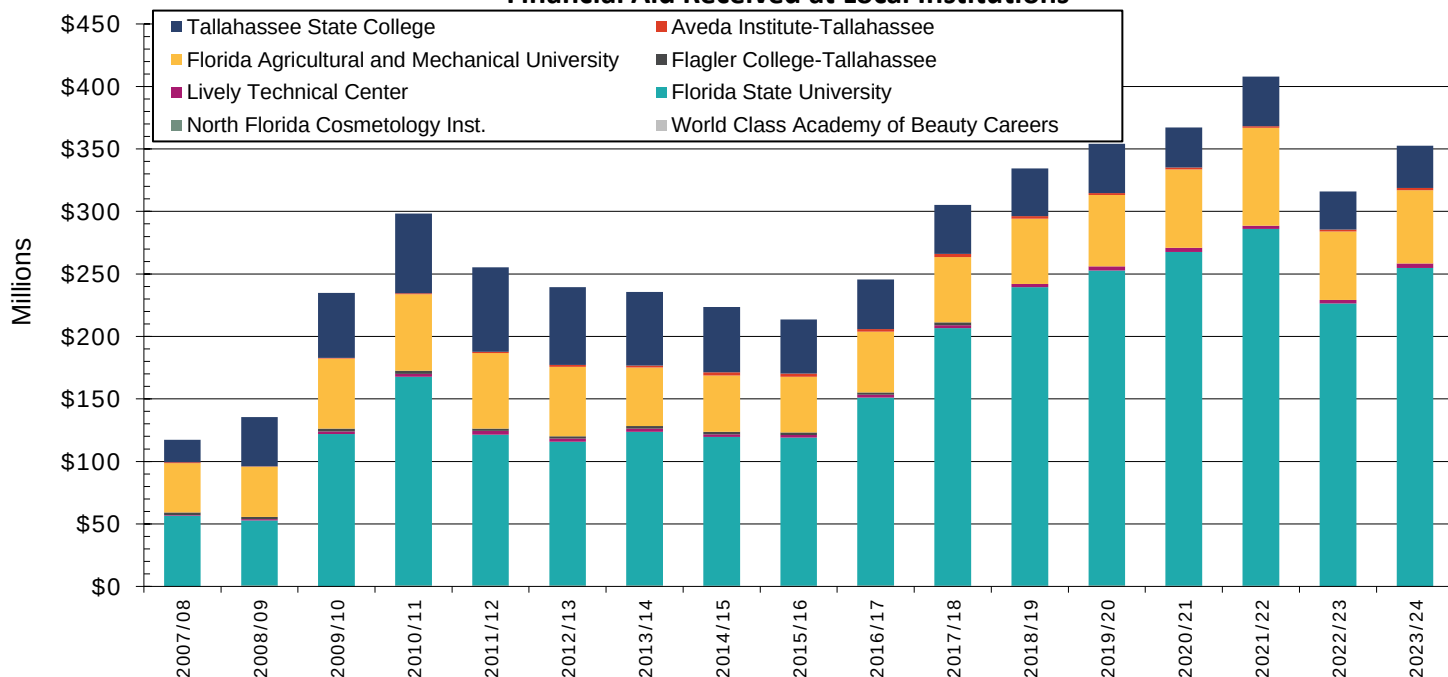
Trend: During 2019/20 to 2023/24, financial aid received by undergraduate students from all sources averaged \$360 million per year. FSU accounted for approximately 71%; FAMU, 17%; TSC, 10%; and other institutions, ~2%.

Year	Aveda Institute-Tallahassee	Flagler College-Tallahassee	Florida Agricultural and Mechanical University	Florida State University	Lively Technical Center	North Florida Cosmetology Inst.	Tallahassee State College	World Class Academy of Beauty Careers	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	\$74,348	\$245,753,545
2017/18	\$2,566,872	\$2,201,949	\$52,294,948	\$205,985,895	\$2,399,137	\$585,778	\$39,119,719	\$151,825	\$305,306,123
2018/19	\$2,036,617	NA	\$52,246,277	\$238,718,462	\$2,605,054	\$664,300	\$38,055,270	\$196,144	\$334,522,124
2019/20	\$1,534,886	NA	\$57,085,721	\$252,042,797	\$3,221,725	\$777,881	\$39,492,885	\$333,065	\$354,488,960
2020/21	\$1,534,886	NA	\$62,960,773	\$266,982,847	\$3,161,381	\$662,255	\$31,768,719	\$193,424	\$367,264,285
2021/22	\$1,279,896	NA	\$78,328,557	\$285,292,116	\$2,748,758	\$615,455	\$39,647,616	\$176,212	\$408,088,610
2022/23	\$1,634,143	NA	\$54,704,556	\$226,245,894	\$2,983,293	\$431,970	\$30,470,823	\$179,662	\$316,650,341
2023/24	\$1,989,556	NA	\$58,608,206	\$254,802,714	\$3,468,567	\$544,026	\$33,787,104	\$160,577	\$353,360,750

*Total amount of federal, state, local, institutional, or other sources of grant aid dollars awarded to undergraduate students. Data for Flagler College-Tallahassee unavailable after 2019.

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

Financial Aid Received at Local Institutions





Education

Tallahassee MSA Contributions from Florida Lottery

Trend: Since 1987, over \$1.56 billion has gone towards educational institutions in the Tallahassee MSA from the Florida Lottery, with universities accounting for 75% and K-12 Grades accounting for around 20%. Leon County accounted for 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
2020	\$267,797	\$47,645	\$90,377,950	\$201,498	\$0	\$3,363,984	\$4,811,587	\$82,719,319
2021	\$282,162	\$50,042	\$106,883,755	\$204,216	\$0	\$3,631,458	\$5,576,841	\$98,211,876

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

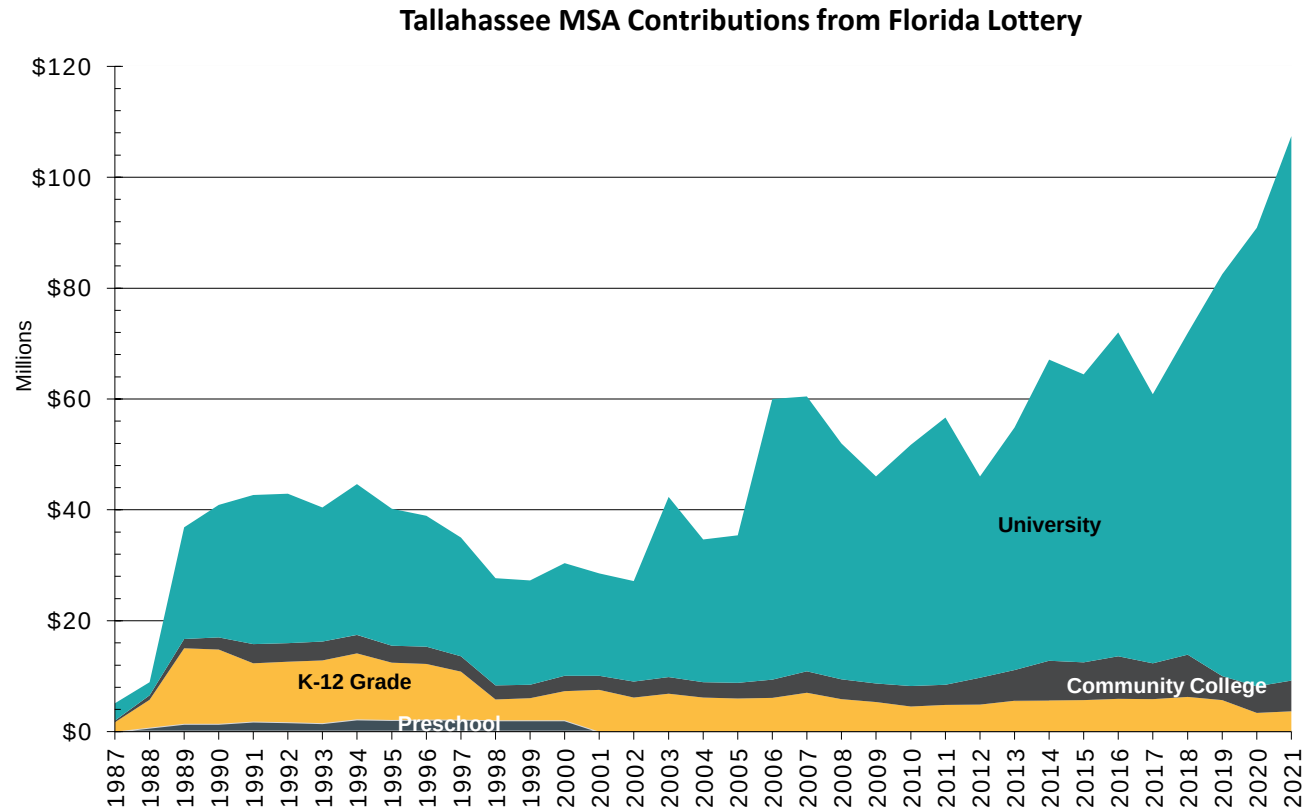
Source: Florida Lottery.

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Education

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Community and Environment

Electric Service Points

Trend: Residential Electric Service Points have increased 0.6% per year on average between 2016 and 2025, while Non-Demand Commercial Service Points increased by an average of <0.1% 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
2021	106,321	12,435
2022	107,358	12,648
2023	101,318	11,491
2024	105,267	11,974
2025	104,584	11,803

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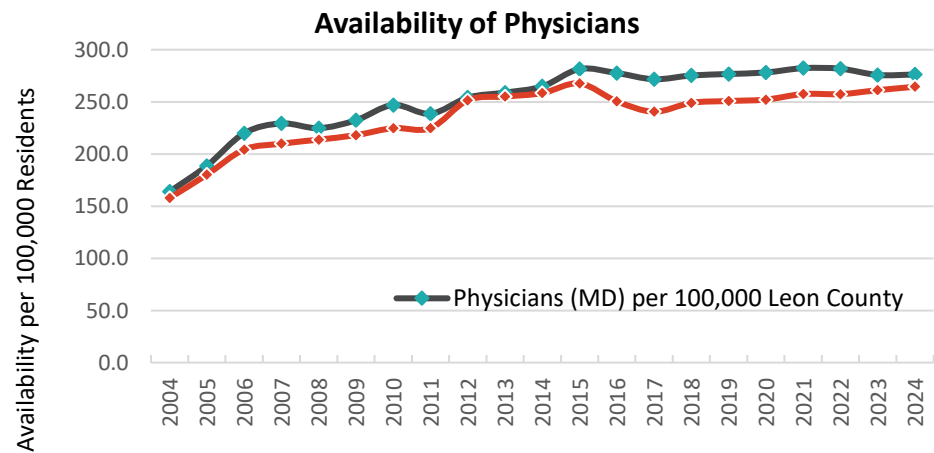
Community and Environment

Health Resource Availability

Trend: During 2020-2024, availability of hospital beds in Leon County was on average 30% higher than Florida's, and availability of physicians was 8% higher in Leon County than statewide.

Year	Physicians (MD) per 100,000		Hospital Beds per 100,000	
	Leon County	State of Florida	Leon County	State of Florida
2004	163.9	157.9	403.9	326.0
2005	188.7	180.2	403.1	322.9
2006	219.9	204.3	398.1	319.1
2007	229.3	209.9	404.4	318.0
2008	224.8	213.8	401.0	319.9
2009	232.4	218.1	399.6	321.0
2010	247.0	224.8	405.8	320.1
2011	238.6	224.8	405.2	319.1
2012	254.1	251.6	419.3	319.8
2013	258.9	255.1	417.7	320.4
2014	264.8	258.4	413.0	316.8
2015	281.5	267.7	416.9	313.9
2016	277.6	250.5	412.1	312.4
2017	271.7	240.6	413.9	312.3
2018	275.3	249.1	416.2	308.2
2019	276.7	250.8	407.1	311.2
2020	278.2	252.2	402.0	307.6
2021	282.3	257.5	399.3	305.0
2022	281.8	257.4	410.2	318.7
2023	275.8	261.2	406.8	316.3
2024	276.2	264.5	402.1	302.8

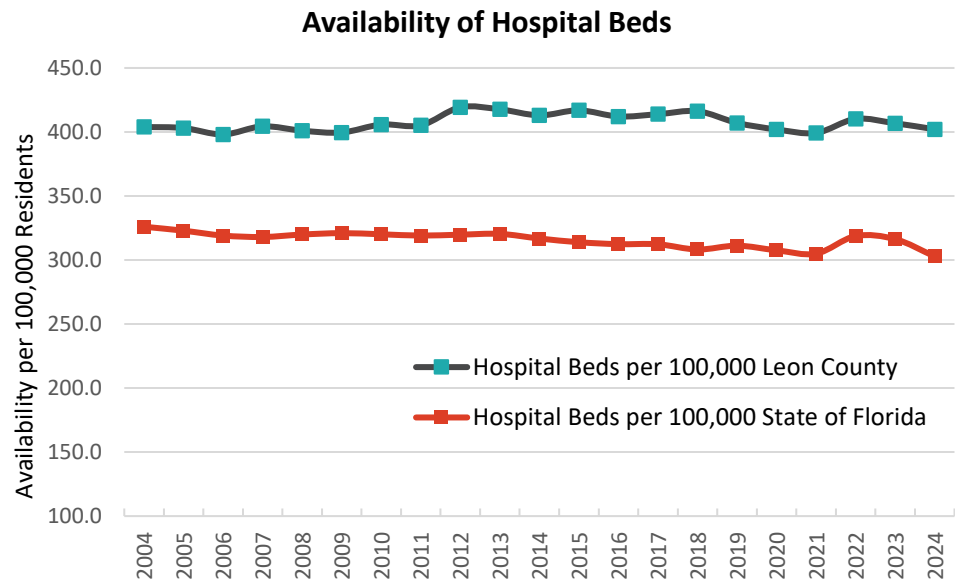
Source: Florida Department of Health, Division of Public Health Statistics & Performance Management. Data for providers are for fiscal year.





Community and Environment
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Community and Environment

Public Safety:

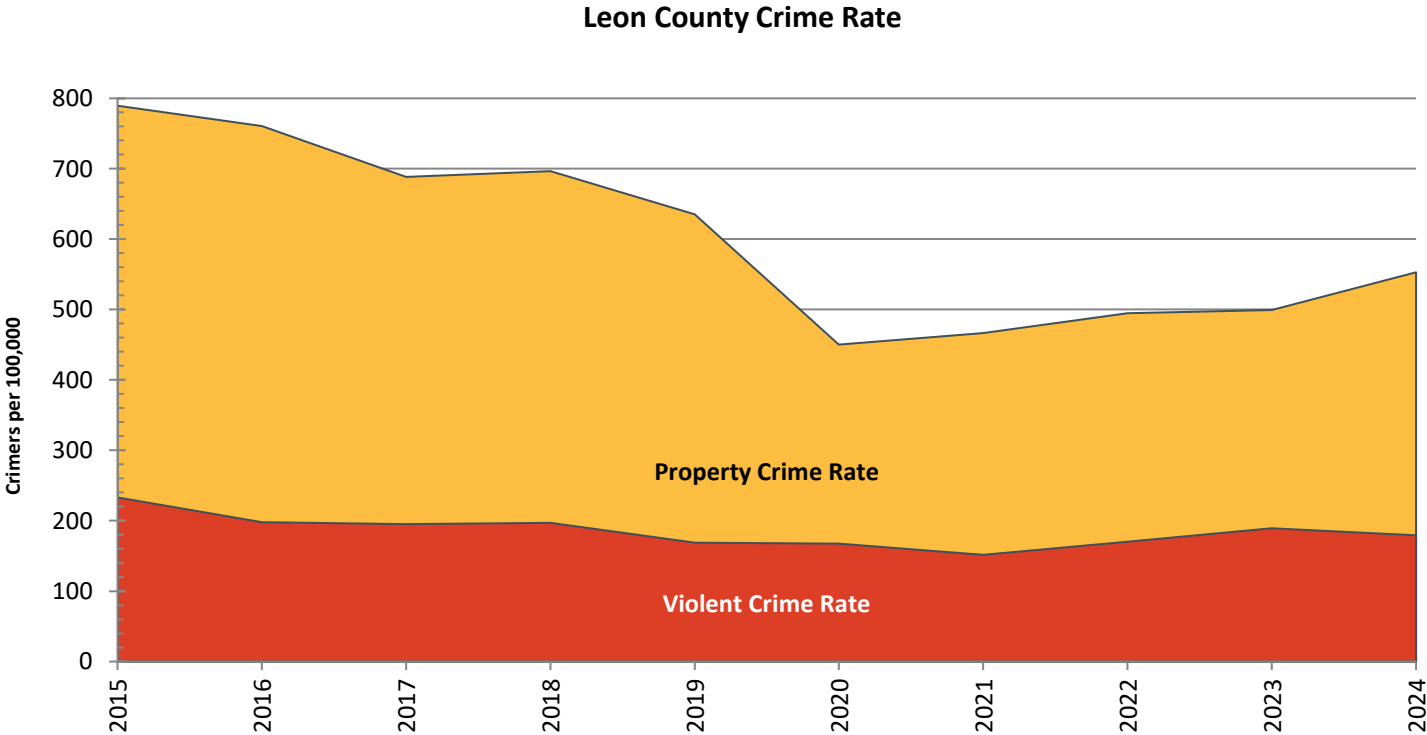
Leon County Crime Rate

Trend: On a per capita basis, the overall frequency of crime in Leon County has fallen over the past decade. The index crime rate in 2024 was 28% lower than in 2015, with property crimes down 30% and violent crimes down 23% in 2024 compared to 2015.

Year	Property Crime Rate		Violent Crime Rate	
	Leon County	Florida	Leon County	Florida
2015	789.6	599.6	233.1	185.7
2016	760.5	552.6	197.9	176.9
2017	688.6	509.3	195.3	171.2
2018	696.4	482.6	197.1	163.2
2019	635.3	453.5	168.8	157.7
2020	450.2	332.9	167.7	150.5
2021	466.8	305.9	151.7	147.1
2022	494.6	334.5	170.1	157.6
2023	499.1	355.9	189.2	150.7
2024	553.0	352.6	179.1	145.7

Note: Rates are per 100,000 population. Property crimes include burglary, larceny, and motor vehicle theft. Violent crimes include murder, forcible sex offenses, robbery, and aggravated assault. Does not include records involving a notice to appear, direct files, or sworn complaints where no physical arrest was made.

Source: Florida Department of Law Enforcement, Computerized Criminal History (CCH), Count of Arrest Events for Selected Crime Categories.





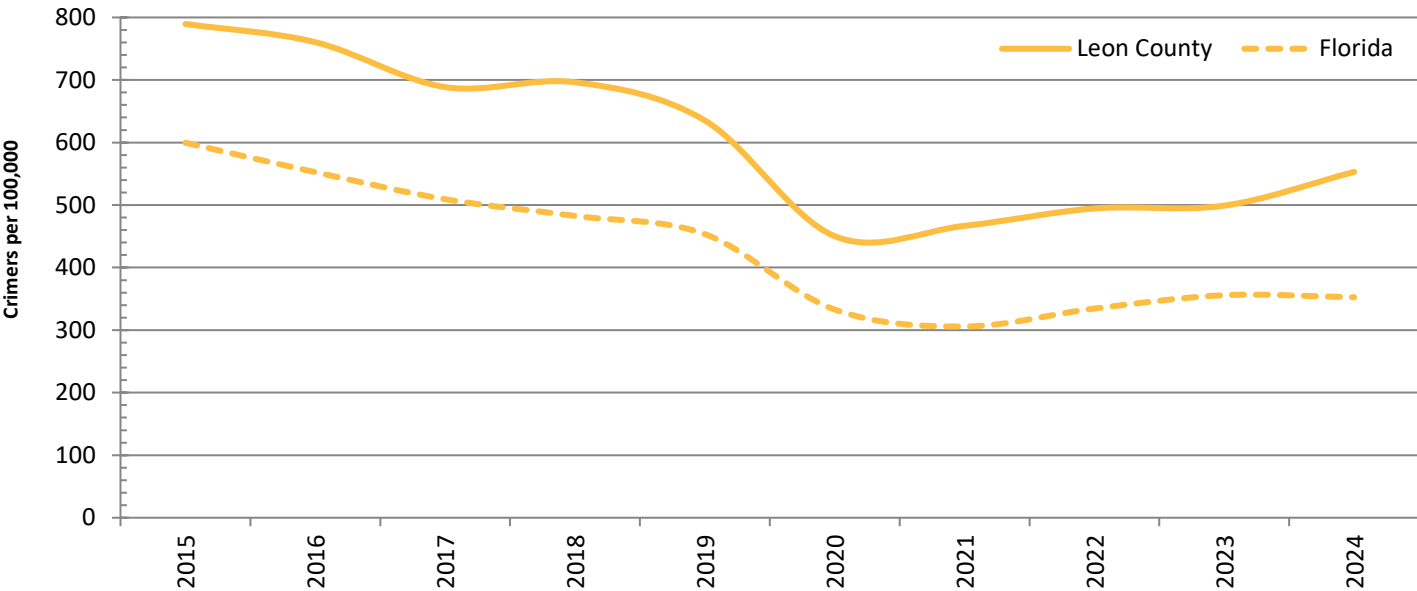
Community and Environment

Public Safety:

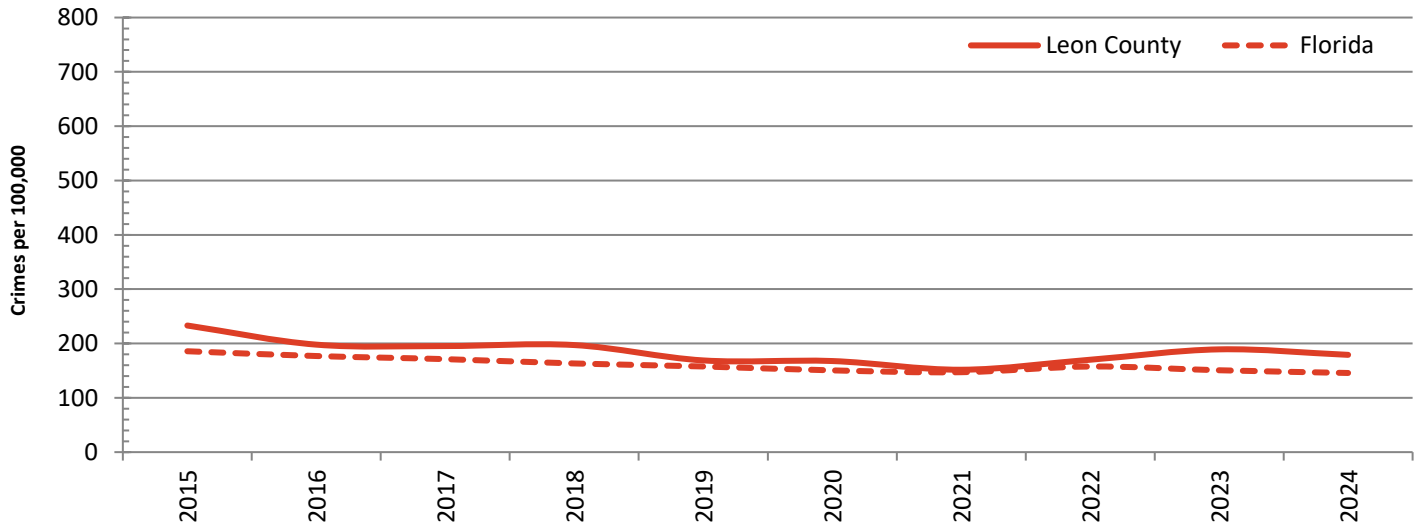
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Property Crimes



Violent Crimes





Community and Environment

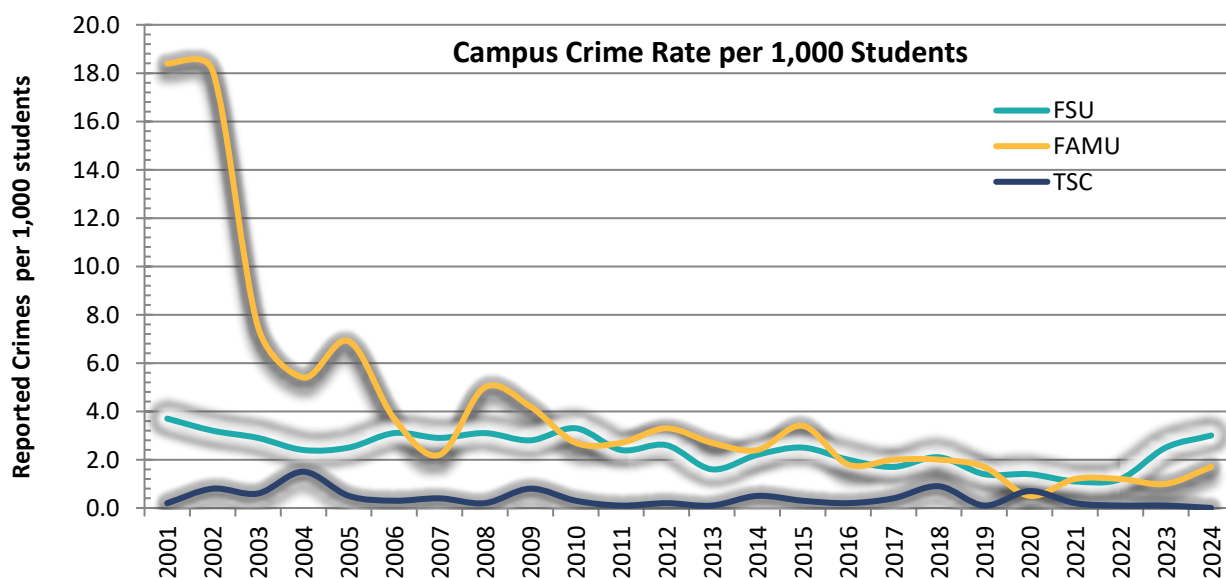
Public Safety:

Campus Crime Rate

Trend: On a per student basis, the frequency of crimes on the campuses of FSU, FAMU, and TSC were lower in the 2010s than in the 2000s. The Clery Act requires that all postsecondary institutions participating in title IV student financial assistance programs disclose campus crime statistics and other security information to students and the public.

Year	FSU Reported Crimes per 1,000 Students	FAMU Reported Crimes per 1,000 Students	TSC Reported Crimes per 1,000 Students
2001	3.7	18.4	0.2
2002	3.2	18.1	0.8
2003	2.9	7.5	0.6
2004	2.4	5.4	1.5
2005	2.5	6.9	0.5
2006	3.1	3.7	0.3
2007	2.9	2.2	0.4
2008	3.1	5.0	0.2
2009	2.8	4.2	0.8
2010	3.3	2.7	0.3
2011	2.4	2.7	0.1
2012	2.6	3.3	0.2
2013	1.6	2.7	0.1
2014	2.2	2.4	0.5
2015	2.5	3.4	0.3
2016	2.0	1.8	0.2
2017	1.7	2.0	0.4
2018	2.1	2.0	0.9
2019	1.4	1.7	0.1
2020	1.4	0.5	0.7
2021	1.1	1.2	0.2
2022	1.2	1.2	0.1
2023	2.5	1.0	0.1
2024	3.0	1.7	0.0

Source: US Department of Education, Office of Federal Student Aid, Clery Act reports





Community and Environment

Property Tax Rate

2025 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	8.3144
Leon County - Children's Services Council	Anywhere in Leon County	0.3477
Leon County - Emergency Medical Service	Anywhere in Leon County	0.7500
Leon County School Board		
State Law	Anywhere in Leon County	3.1180
Local Board	Anywhere in Leon County	2.2480
Tallahassee City Commission	Within City Limits Only	4.4072
Downtown Improvement Authority	In the Downtown Area Only	1.0000
NW Florida Water Mgmt. District	Anywhere in Leon County	0.0217
Inside City Limits Total		19.2070
Outside City Limits Total		14.7998
Downtown Improvement Area		20.2070

Source: Leon County Property Appraiser



Community and Environment

Climate

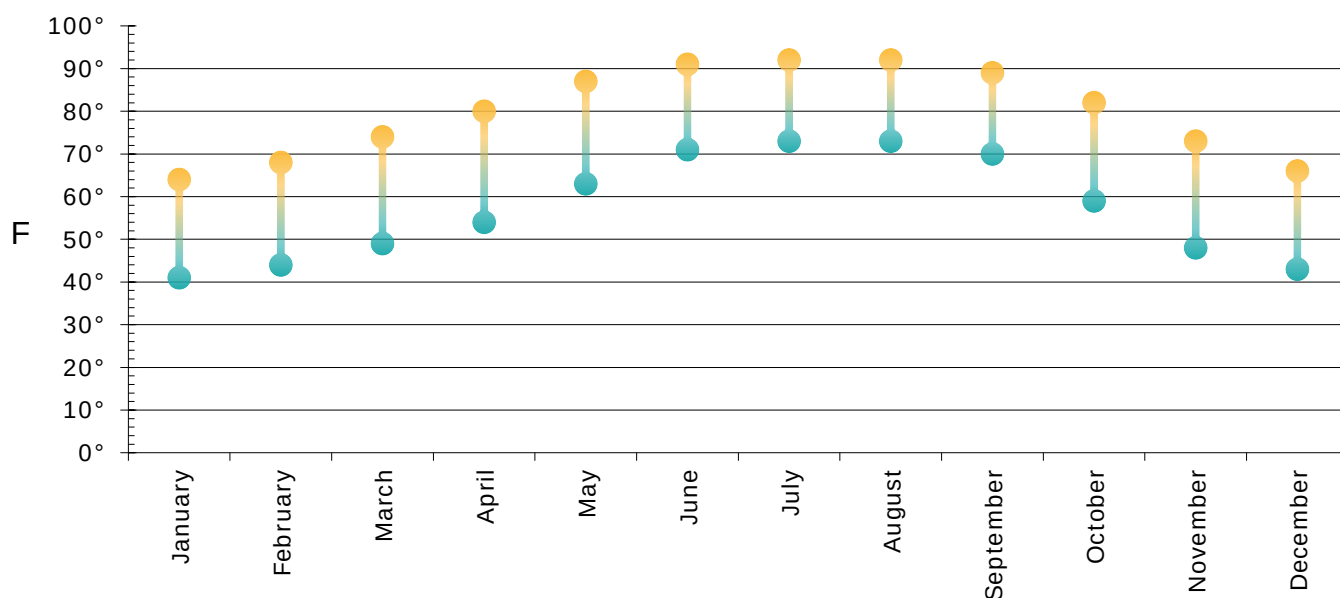
Trend: Tallahassee has a mild, moist climate characteristic of the Gulf States, experiencing a subtropical summer similar to the rest of Florida. In contrast to the Florida peninsula, Northwest Florida of which Tallahassee is a part, experiences four seasons. Prevailing winds average 5.5 miles per hour 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) (1991-2020)	Avg. Low Temperature (°F) (1991-2020)	Avg. Days Above 90°F (1940-2023)	Avg. Days Below 32°F (1940-2023)	Avg. Number of Days With Rain (1940-2023)	Avg. Rainfall (Inches) (1991-2020)
January	64	41	0	9	9	4.4
February	68	44	0	6	8	4.3
March	74	49	*	2	8	5.2
April	80	54	1	*	7	3.5
May	87	63	10	0	8	3.4
June	91	71	19	0	13	7.8
July	92	73	23	0	17	7.1
August	92	73	22	0	15	7.6
September	89	70	14	0	9	4.9
October	82	59	2	*	5	3.2
November	73	48	0	3	6	3.1
December	66	43	0	8	8	4.2
<i>Annual</i>	<i>79.7</i>	<i>57.2</i>	<i>92</i>	<i>28</i>	<i>115</i>	<i>58.8</i>

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

Source: National Climatic Data Center, Comparative Climatic Data

Tallahassee Average Daily Low and High Temperatures





Community and Environment

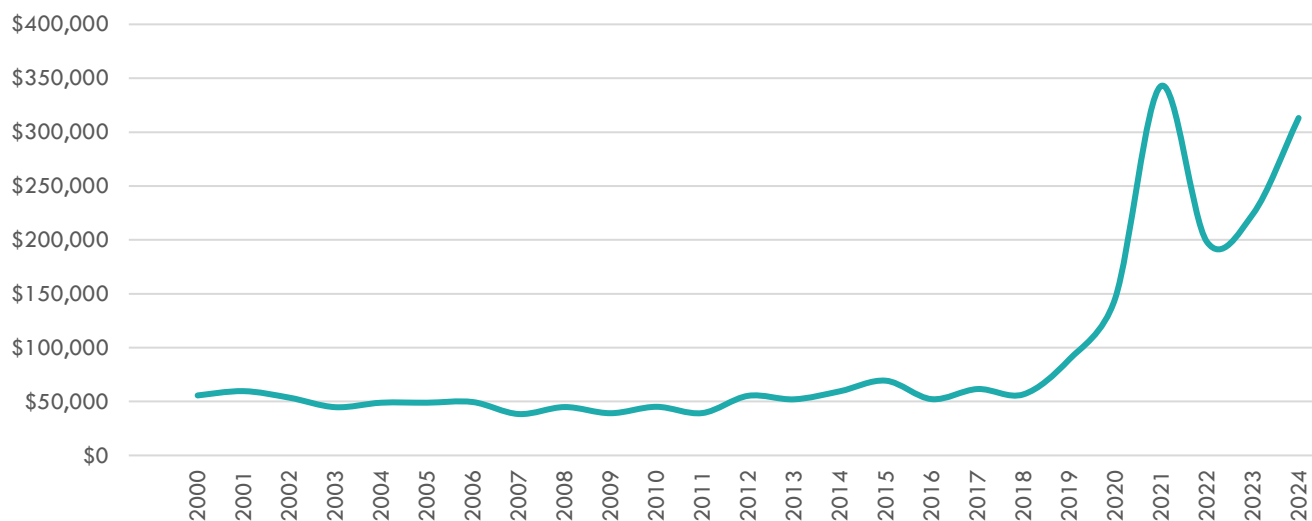
Agriculture in Tallahassee MSA

Trend: Gadsden and Jefferson counties account for most commercial agricultural activity in the Tallahassee MSA, with cotton, peanuts, and cattle as principal commodities. As of 2024, farm earnings exceeded \$313 million, up from \$59.5 million in 2014.

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	\$53,594
2003	\$16,443	\$108,476	\$44,772
2004	\$19,790	\$104,000	\$48,904
2005	\$19,436	\$114,113	\$48,919
2006	\$16,817	\$101,723	\$49,515
2007	\$14,848	\$114,913	\$38,400
2008	\$17,129	\$107,591	\$44,874
2009	\$16,392	\$102,114	\$39,166
2010	\$22,149	\$101,867	\$45,117
2011	\$27,509	\$95,810	\$39,299
2012	\$33,498	\$97,253	\$55,299
2013	\$40,174	\$86,069	\$52,058
2014	\$56,305	\$84,624	\$59,518
2015	\$54,688	\$88,279	\$69,356
2016	\$44,061	\$88,226	\$52,229
2017	\$51,316	\$91,705	\$61,598
2018	\$49,749	\$87,376	\$56,637
2019	\$46,540	\$91,917	\$89,046
2020	\$45,809	\$98,117	\$145,489
2021	\$49,212	\$95,968	\$342,765
2022	\$63,666	\$105,551	\$198,266
2023	N/A	N/A	\$223,740
2024	N/A	N/A	\$313,104

Source: Bureau of Economic Analysis, CAINC5N Personal Income, and CAINC45 Farm Income and Expenses (discontinued after 2022)

Farm Earnings (\$1,000s)





Community and Environment

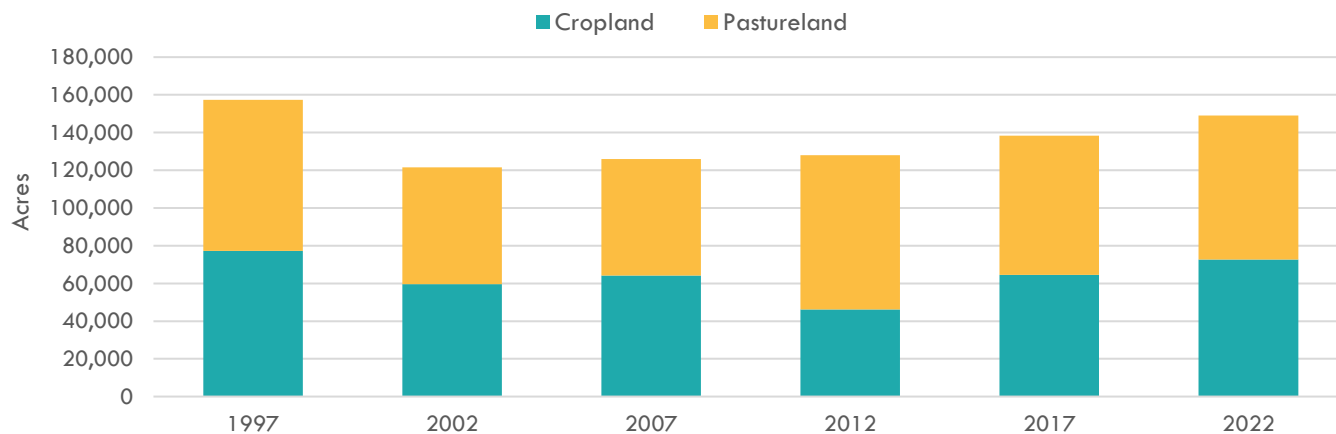
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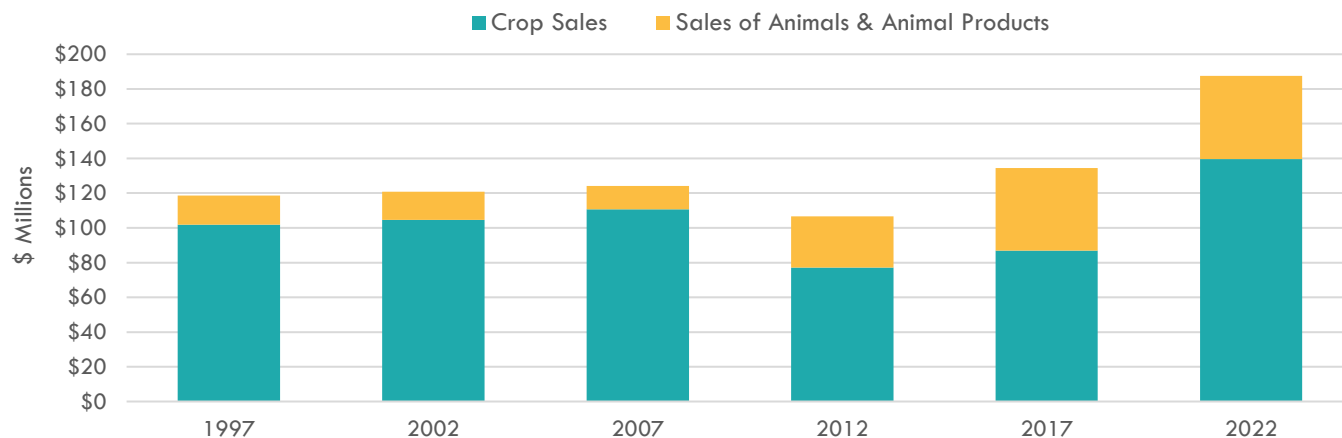
Year	Farmland Acreage in Tallahassee MSA		Agricultural Sales (\$1,000s)	
	Cropland	Pastureland	Crop Sales	Sales of Animals & Animal Products
1997	77,305	80,065	\$101,932	\$16,642
2002	59,617	61,881	\$104,659	\$16,115
2007	64,109	61,786	\$110,671	\$13,531
2012	46,237	81,696	\$77,070	\$29,494
2017	64,542	73,869	\$87,008	\$47,514
2022	72,617	76,443	\$139,655	\$47,887

Source: USDA, Census of Agriculture

Farmland Acreage in Tallahassee MSA



Agricultural Sales in Tallahassee MSA





Community and Environment

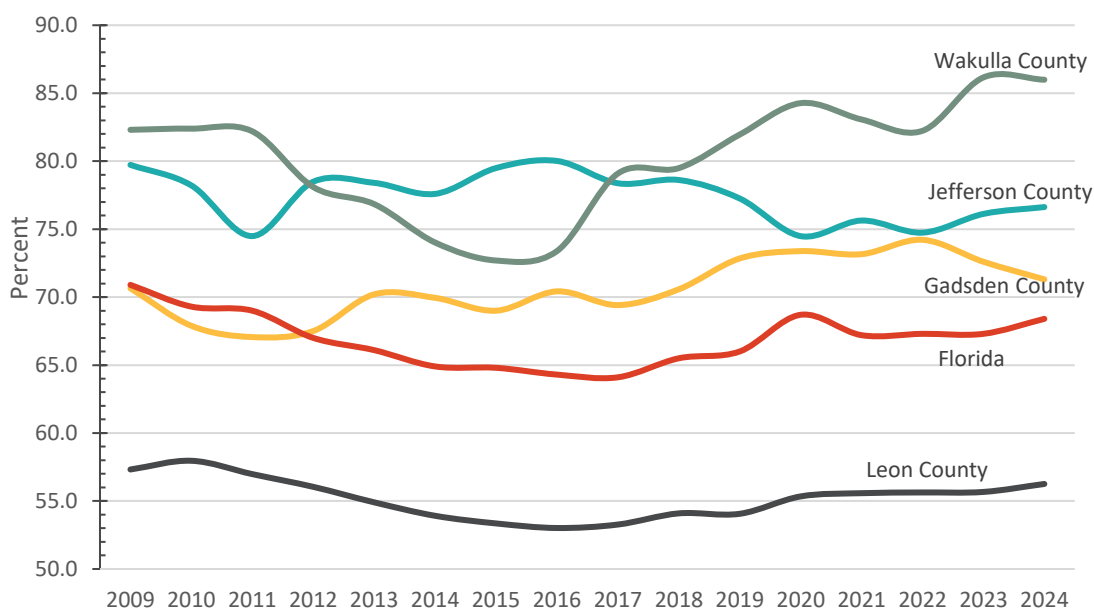
Homeownership Rate in Tallahassee MSA

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
2020	55.3	74.5	73.4	84.3	68.7
2021	55.6	75.6	73.2	83.1	67.2
2022	55.6	74.7	74.2	82.2	67.3
2023	55.7	76.1	72.6	86.2	67.3
2024	56.3	76.6	71.3	86.0	68.4

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

Total Registered Vehicles in Leon County

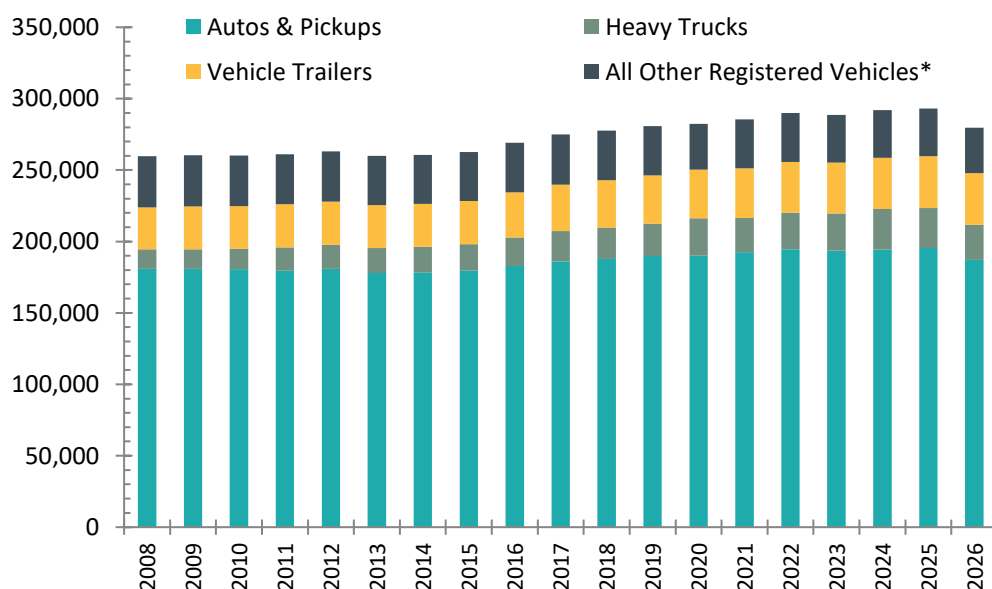
Trend: Total registered vehicles increased by 11.6% from 2015 to 2025, by an annual average of 1.1% per year before falling by 4.6% in 2026. Autos and pickups account for 67% of total registrations.

Year	Autos & Pickups	Heavy Trucks	Vehicle Trailers	All Other Registered Vehicles*	Total Registered Vehicles
2008	180,789	13,738	29,462	35,706	259,695
2009	180,948	13,688	29,908	35,873	260,417
2010	180,729	14,244	29,805	35,389	260,167
2011	179,549	16,233	30,284	34,961	261,027
2012	180,800	16,759	30,273	35,185	263,017
2013	178,047	17,299	30,110	34,555	260,011
2014	178,397	18,002	29,875	34,459	260,733
2015	179,723	18,362	30,374	34,191	262,650
2016	182,863	20,019	31,476	34,784	269,142
2017	186,122	21,228	32,410	35,184	274,944
2018	187,718	22,012	33,141	34,851	277,722
2019	189,913	22,603	33,723	34,475	280,714
2020	190,073	26,148	34,124	32,120	282,465
2021	192,586	23,858	34,879	34,110	285,433
2022	194,435	25,611	35,683	34,269	289,998
2023	193,719	25,905	35,727	33,343	288,694
2024	194,318	28,350	35,910	33,492	292,070
2025	195,337	28,089	36,224	33,450	293,100
2026	187,081	24,684	36,041	31,851	279,657

* 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





Community and Environment

Motor Vehicle Crashes in Leon County

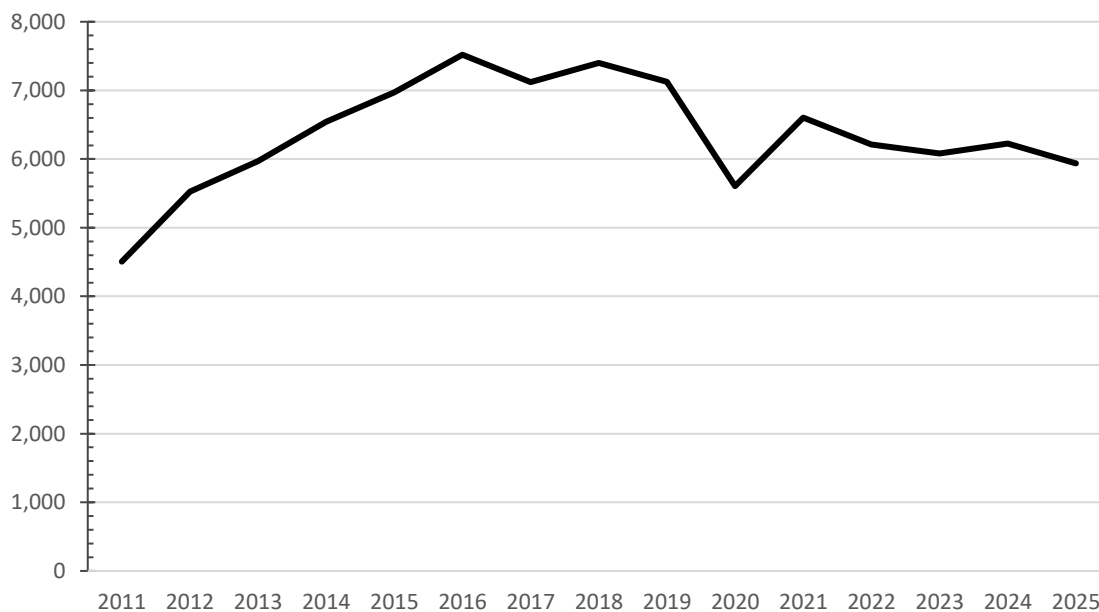
Trend: Between 2021 and 2025, there were on average about 6,200 motor vehicle crashes in Leon County each year (or about 17 per day), with an annual average of 33 crash fatalities.

Year	Total Crashes	Vehicles in Crashes	Crash Damage Amount (\$ millions)	Persons Involved	Crash Fatalities
2011	4,506	8,334	\$20.7	9,560	33
2012	5,527	10,192	\$38.3	12,288	42
2013	5,971	11,074	\$27.5	14,135	17
2014	6,541	12,210	\$31.4	15,419	33
2015	6,971	13,079	\$35.1	16,593	29
2016	7,520	14,338	\$44.4	18,286	40
2017	7,120	13,574	\$38.8	17,746	35
2018	7,402	14,055	\$44.0	18,265	30
2019	7,126	13,543	\$43.4	17,369	35
2020	5,605	10,299	\$39.3	12,873	35
2021	6,605	12,369	\$46.8	15,779	46
2022	6,214	11,690	\$51.3	14,948	34
2023	6,081	11,414	\$50.7	14,652	26
2024	6,228	11,632	\$63.3	14,790	39
2025	5,936	11,187	\$53.0	14,148	22

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. Includes crashes reported by Tallahassee Police, Leon County Sheriff, Florida Highway Patrol, FSU Police, FAMU Police, TSC Police, and Capitol Police.

Source: Signal Four Analytics, University of Florida GeoPlan Center

Motor Vehicle Crashes in Leon County





Residential and Commercial Development

Residential Development:

Residential Building Permits Issued

Trend: There were 2,542 residential permits issued in 2025, the most since 2005. In the 2020s so far, there were an average of around 1,800 residential units permitted per year, compared to 1,200 per year in the 2010s, 2,400 per year in the 2000s, 2,700 per year in the 1990s, 2,900 per year in the 1980s, and 2,600 per year in the 1970s. Multi-family new construction permits in 2025 totaled 1,949 (including Student apartments). Major projects permitted included Cascade Trail Student Housing, UP Campus, The Cottages at Capital Circle, and The Hall.

Year	Detached Single-Family	Attached Single-Family	Multi-Family	Constructed Units Permitted	Mobile Homes*	Total Housing Units Permitted	Total Units Permitted, Yearly % Change
1985	992	97	54	1,143	540	1,683	
1986	1,271	286	280	1,837	661	2,498	48.4%
1987	1,366	375	860	2,601	611	3,212	28.6%
1988	1,439	363	781	2,583	540	3,123	-2.8%
1989	1,743	410	1,261	3,414	658	4,072	30.4%
1990	1,346	393	1,136	2,875	542	3,417	-16.1%
1991	1,215	152	298	1,665	480	2,145	-37.2%
1992	1,359	284	441	2,084	480	2,564	19.5%
1993	1,373	269	381	2,023	530	2,553	-0.4%
1994	1,437	188	476	2,101	556	2,657	4.1%
1995	1,261	302	1,268	2,831	716	3,547	33.5%
1996	1,256	257	441	1,954	584	2,538	-28.4%
1997	1,109	259	837	2,205	649	2,854	12.5%
1998	1,012	166	534	1,712	606	2,318	-18.8%
1999	1,245	162	654	2,061	443	2,504	8.0%
2000	1,154	123	782	2,059	430	2,489	-0.6%
2001	1,127	258	962	2,347	349	2,696	8.3%
2002	1,436	97	1,375	2,908	259	3,167	17.5%
2003	1,456	254	1,197	2,907	306	3,213	1.5%
2004	1,276	184	1,492	2,952	239	3,191	-0.7%
2005	1,552	392	1,411	3,355	152	3,507	9.9%
2006	926	354	659	1,939	132	2,071	-40.9%
2007	756	357	1,041	2,154	175	2,329	12.5%
2008	425	124	267	816	113	929	-60.1%
2009	326	47	327	700	92	792	-14.7%
2010	300	101	27	428	90	518	-34.6%
2011	268	80	553	901	70	971	87.5%
2012	283	44	847	1,174	54	1,228	26.5%
2013	398	64	720	1,182	54	1,236	0.7%
2014	443	39	698	1,180	50	1,230	-0.5%
2015	471	64	250	785	64	849	-31.0%
2016	526	30	1,217	1,773	73	1,846	117.4%
2017	630	104	1,394	2,128	62	2,190	18.6%
2018	530	72	835	1,437	62	1,499	-31.6%
2019	571	101	253	925	85	1,010	-32.6%
2020	637	44	662	1,343	87	1,430	41.6%
2021	803	25	715	1,543	93	1,636	14.4%



Residential and Commercial Development

Residential Development:

Residential Building Permits Issued

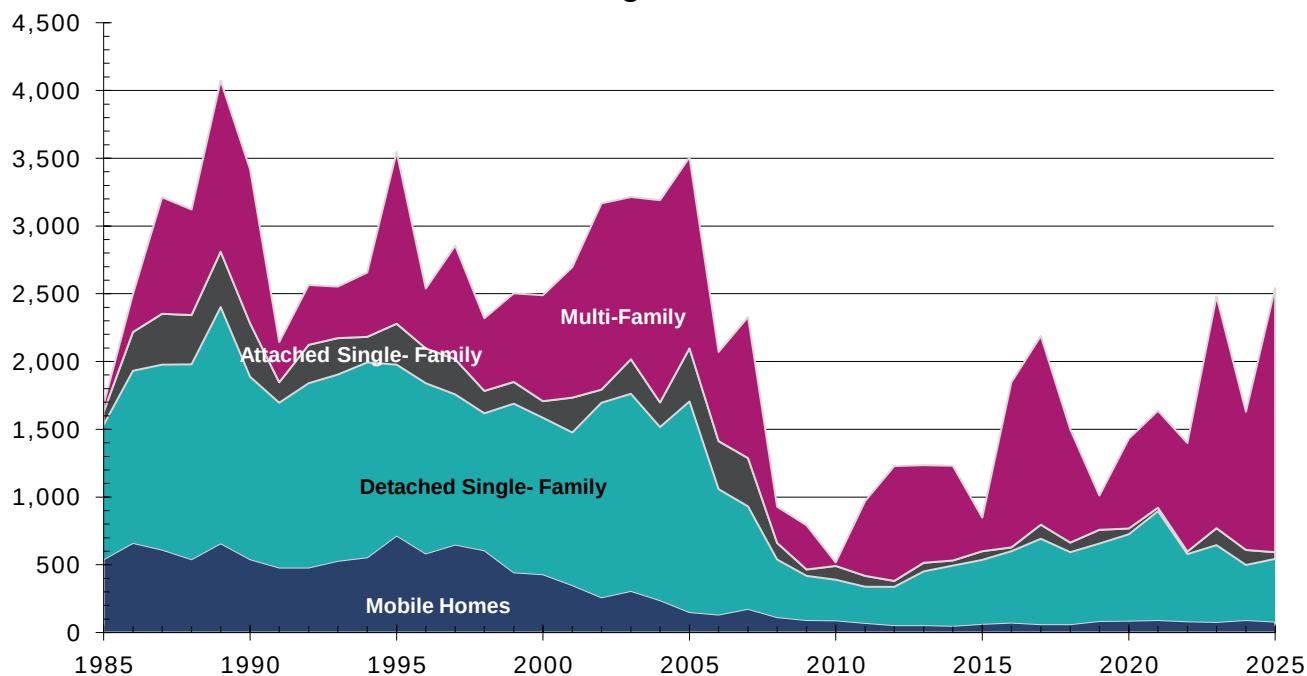
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Year	Detached Single-Family	Attached Single-Family	Multi-Family	Constructed Units Permitted	Mobile Homes*	Total Housing Units Permitted	Total Units Permitted, Yearly % Change
2022	495	20	801	1,316	83	1,399	-14.5%
2023	565	127	1,709	2,401	79	2,480	77.3%
2024	407	110	1,021	1,538	92	1,630	-34.3%
2025	464	49	1,949	2,462	80	2,542	56.0%

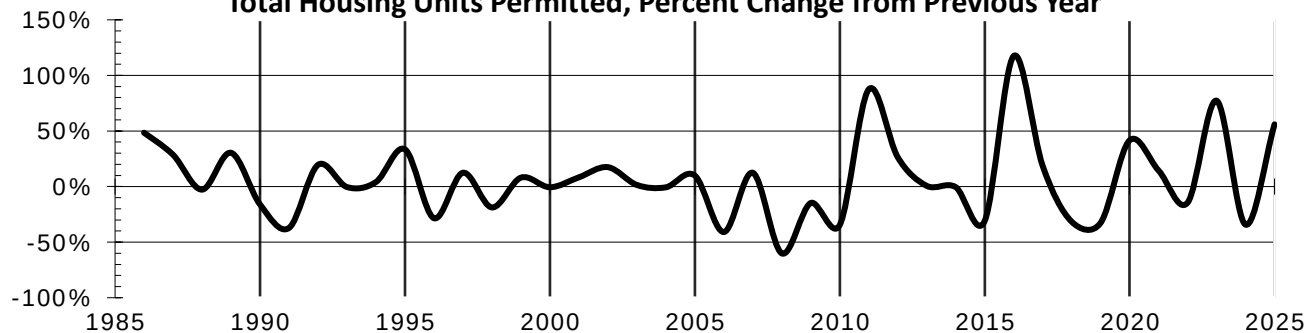
*Mobile home figures do not include permits issued within mobile home parks

Sources: Leon County Department of Development Support & Environmental Management, City of Tallahassee Growth Management Department; tabulation by Tallahassee-Leon County Planning Department

Total Housing Units Permitted



Total Housing Units Permitted, Percent Change from Previous Year





Residential and Commercial Development

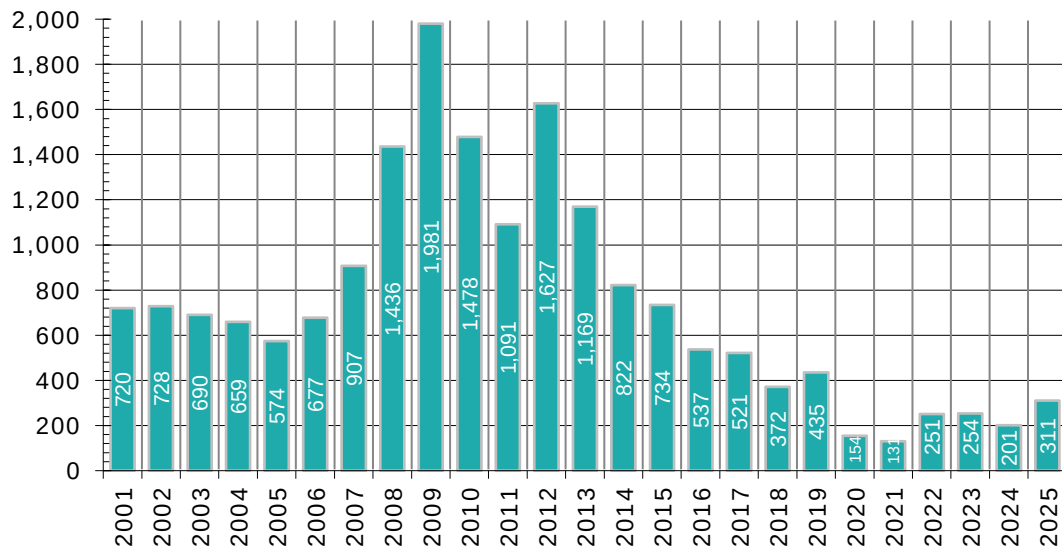
Mortgage Foreclosure Cases

Mortgage foreclosure cases increased by 110 in 2025 compared to 2024.

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	-65%
2021	131	-15%
2022	251	92%
2023	254	1%
2024	201	-21%
2025	311	55%

Source: Leon County Clerk of Courts

Leon County Mortgage Foreclosure Cases





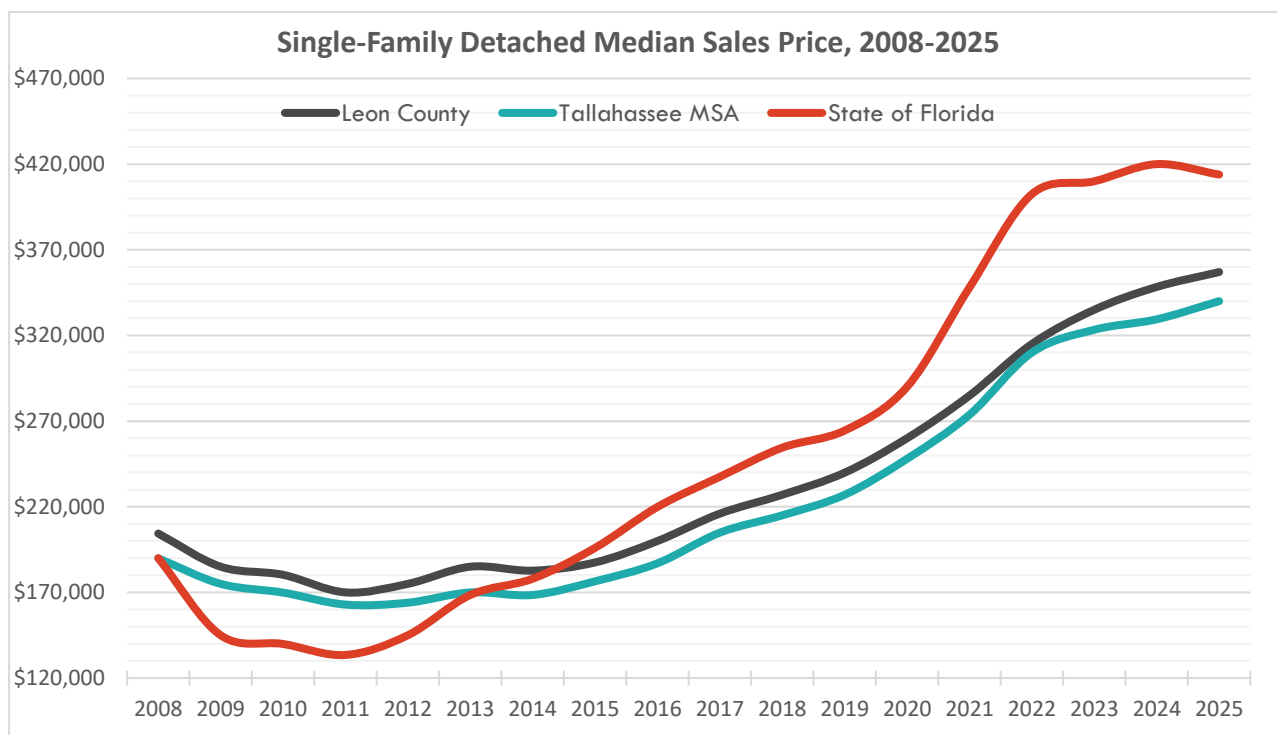
Residential and Commercial Development

Single-Family Detached Home Sales and Median Price

Trend: The median sales price for single family homes was up 2.5% in Leon County, 3.2% for the Tallahassee MSA, and down 1.4% statewide in 2025 from 2024. The median sales price increased 93% between 2015 and 2025 for the Tallahassee MSA, while the statewide median sales price increased 111% 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
2021	3,855	\$284,900	5,136	\$273,700	350,516	\$348,000
2022	3,161	\$315,000	4,403	\$310,000	287,532	\$402,500
2023	2,626	\$335,000	3,675	\$323,330	257,679	\$410,000
2024	2,539	\$348,300	3,582	\$329,411	252,688	\$420,000
2025	2,572	\$357,000	3,580	\$340,000	255,012	\$413,900

Source: Tallahassee Board of Realtors MLS





Residential and Commercial Development

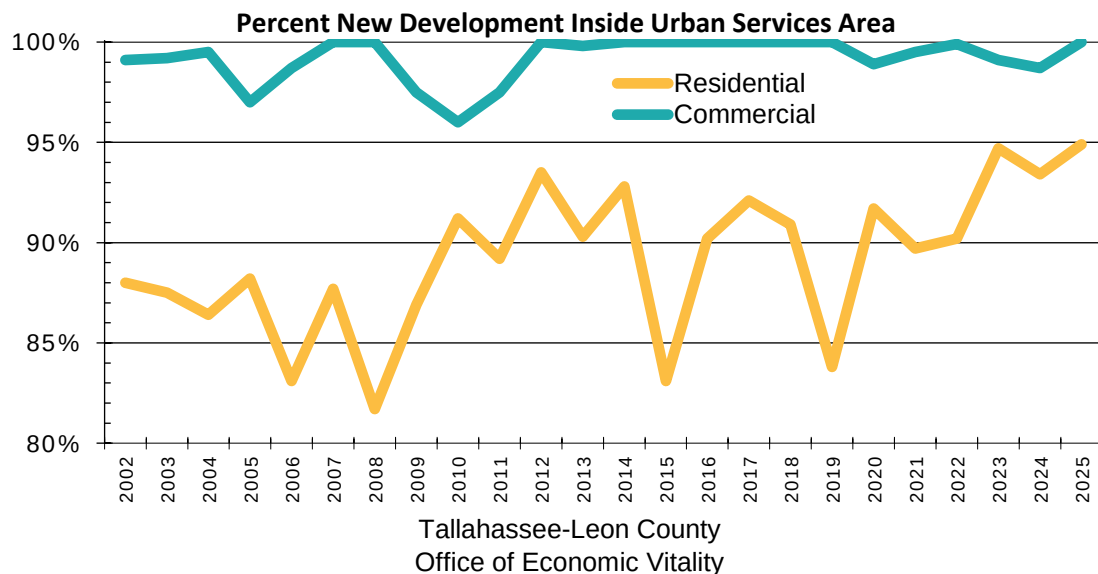
Urban Service Area Development

Trend: The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA). Policy 2.2.1 of the Land Use and Mobility Element calls for the USA "to be sized to include approximately 50% more vacant and developable land than is necessary to accommodate the projected population growth expected within the USA by the long-term planning horizon and will account for both the ability to provide urban infrastructure and the presence of environmentally sensitive lands and water bodies."

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%
2021	89.7%	99.5%
2022	90.2%	99.9%
2023	94.7%	99.1%
2024	93.4%	98.7%
2025	94.9%	100.0%

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

Sources: City of Tallahassee Growth Management Department, Leon County Department of Development Support & Environmental Management. Data aggregated by Tallahassee-Leon County Planning Department.





Economic Factors

Residential and Commercial Development:

Food Service, Apartments, and Lodging Facilities

Trend: In the five years between 2015 and 2020, the total number of restaurant seats available in Leon County increased by 27%, apartment units increased 14%, and hotel and motel rooms and units available increased by around 3%. In 2026, total restaurant seats decreased 16% since 2020, while apartments increased 13% and hotel and motel units increased by 10% since 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
2022	664	62,201	442	34,274	67	6,392
2023	658	63,227	444	34,176	66	6,351
2024	661	63,387	441	35,346	67	6,530
2025	655	61,999	444	36,993	67	6,411
2026	654	61,117	441	37,200	66	6,392

*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



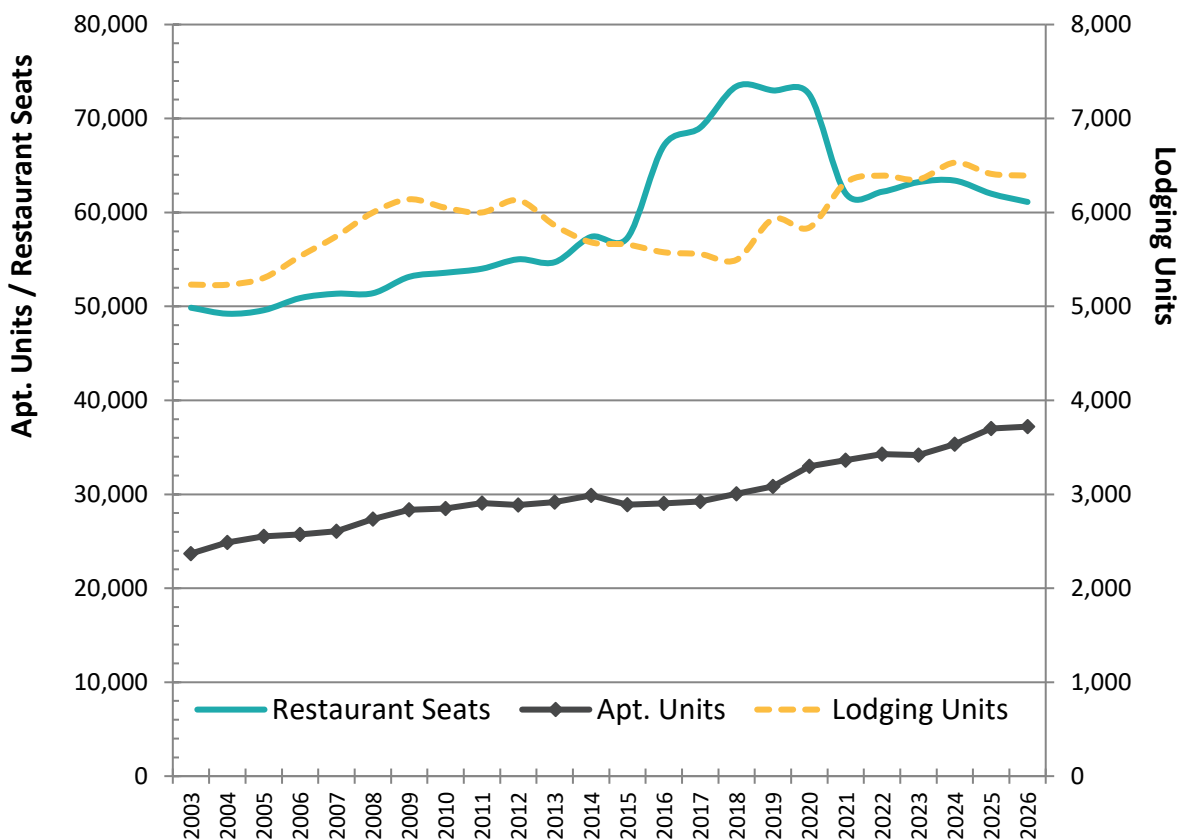
Economic Factors

Residential and Commercial Development:

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





Residential and Commercial Development

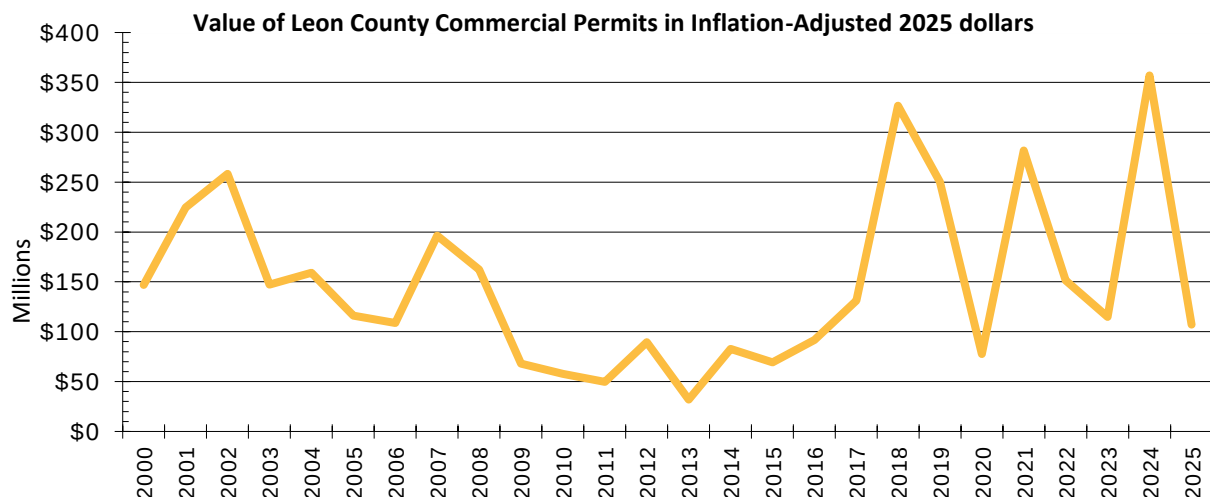
Commercial Building Permits Issued - New Construction

Trend: The value of commercial permits issued for new construction in 2025 totaled \$107 million. Adjusted for inflation relative to 2025, total commercial permit value during the recent 2021-2025 five-year interval was \$1,012 million, 15% higher than the \$878 million inflation-adjusted commercial permit value during the prior 2016-2020 five-year period.

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2025 Dollars (\$Millions)
2000	119	\$78.7	\$147.1
2001	140	\$123.5	\$224.6
2002	129	\$144.3	\$258.3
2003	104	\$84.1	\$147.1
2004	106	\$93.4	\$159.1
2005	98	\$70.5	\$116.2
2006	109	\$68.0	\$108.7
2007	83	\$126.4	\$196.2
2008	88	\$108.5	\$162.3
2009	48	\$45.2	\$67.9
2010	30	\$39.0	\$57.6
2011	26	\$34.7	\$49.7
2012	54	\$63.7	\$89.4
2013	25	\$23.1	\$32.0
2014	39	\$60.9	\$82.9
2015	40	\$51.1	\$69.4
2016	55	\$68.5	\$91.8
2017	88	\$100.0	\$131.3
2018	67	\$254.8	\$326.6
2019	55	\$198.7	\$250.2
2020	58	\$62.4	\$77.6
2021	70	\$237.2	\$281.8
2022	90	\$137.6	\$151.3
2023	88	\$108.8	\$115.0
2024	85	\$347.8	\$357.0
2025	62	\$107.0	\$107.0

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

Sources: Leon County Department of Development Support & Environmental Management, City of Tallahassee Growth Management Department; Bureau of Labor Statistics CPI





Residential and Commercial Development

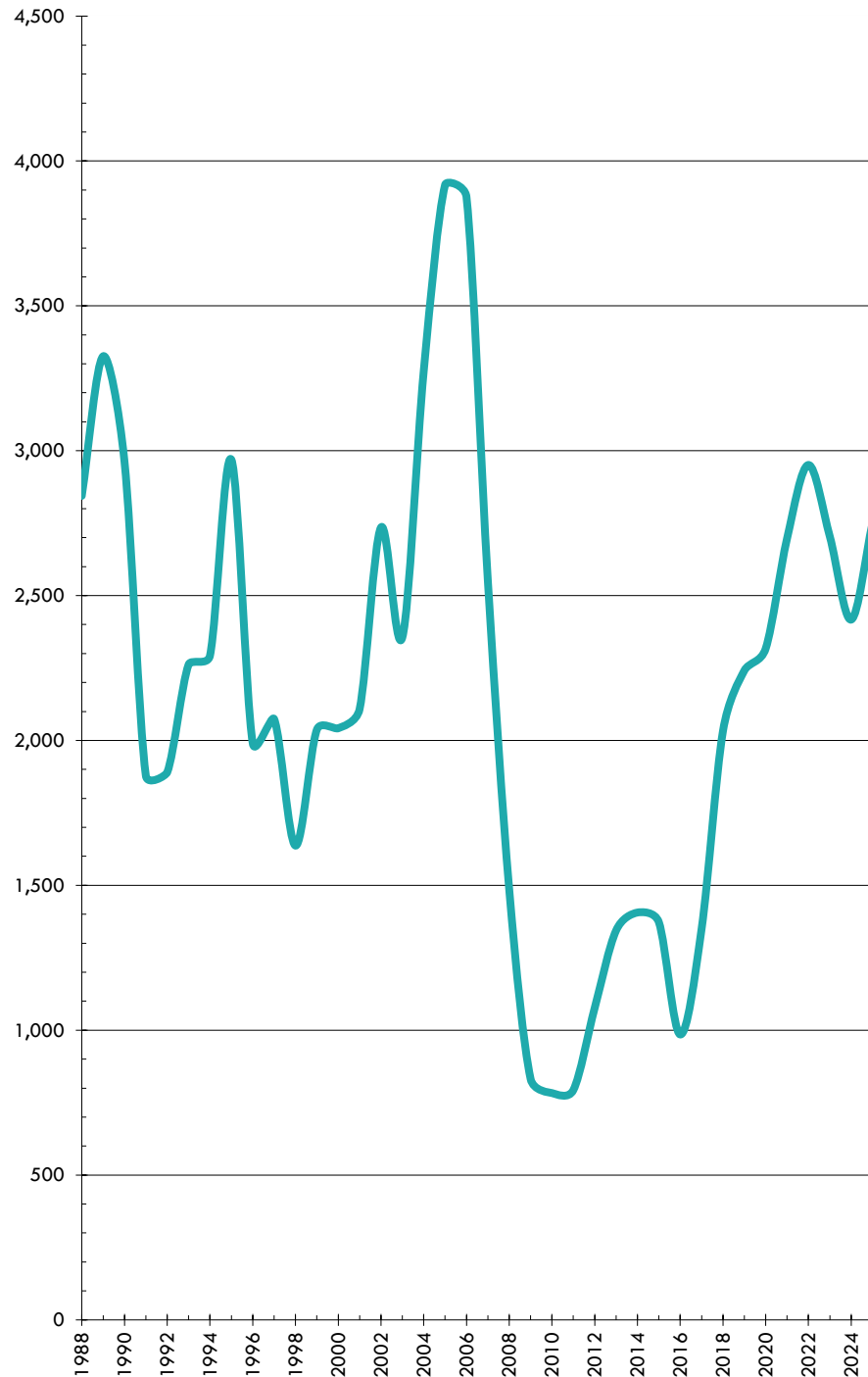
Residential Development:

Housing Units Authorized by Building Permits in Tallahassee MSA

Trend: The overall level of residential building permits for new construction authorized in the Tallahassee MSA is increasing since the precipitous decline during the 2007-2009 recession. During the 1990s, there were an average of 2,198 housing units authorized by permits each year. The annual average increased in the 2000s to 2,518 per year, including the 3,918 units authorized in the peak year of 2005. The annual average in the 2010s was 1,338, or 53% of the average during the 2000s and 61% of the annual average of the 1990s. The average so far in the 2020s is 2,639, nearly double the annual average of the 2010s.

Year	Housing Units Authorized by Building Permits
1988	2,844
1989	3,326
1990	2,962
1991	1,878
1992	1,890
1993	2,262
1994	2,293
1995	2,969
1996	1,990
1997	2,074
1998	1,637
1999	2,037
2000	2,042
2001	2,108
2002	2,735
2003	2,356
2004	3,275
2005	3,918
2006	3,876
2007	2,552
2008	1,486
2009	832
2010	783
2011	793
2012	1,077
2013	1,344
2014	1,406
2015	1,373
2016	985
2017	1,349
2018	2,032
2019	2,241
2020	2,317
2021	2,697
2022	2,951
2023	2,704
2024	2,417
2025	2,751

Total Housing Units Authorized by Building Permits



Note: Annual totals derived from seasonally-adjusted monthly totals.



Residential and Commercial Development

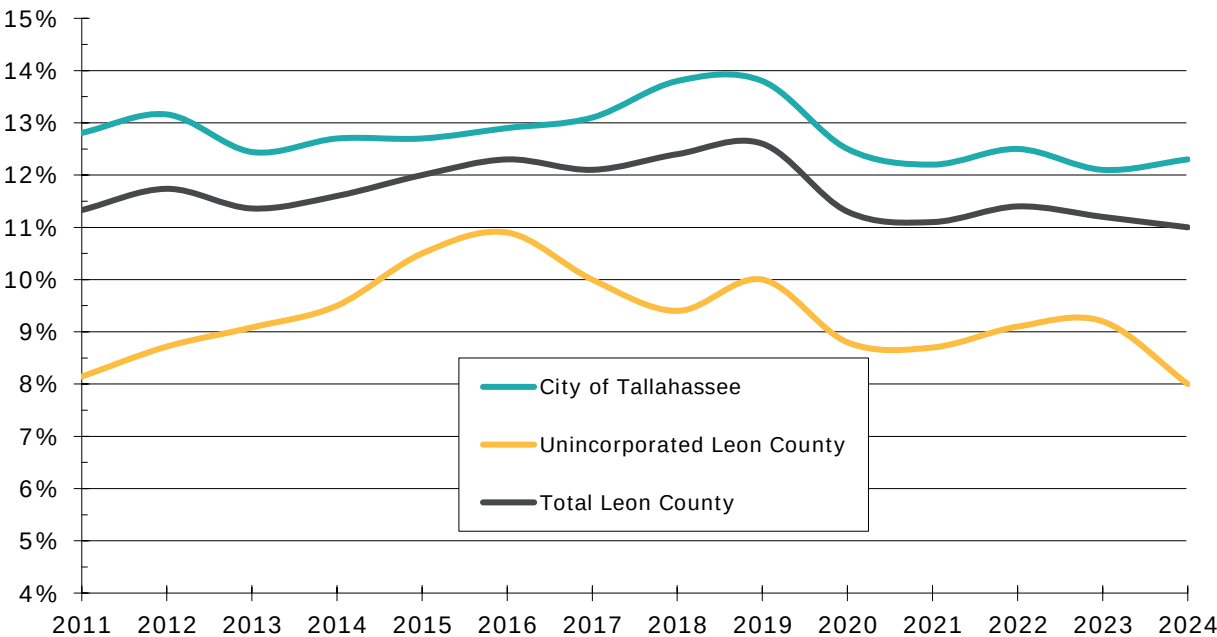
Residential Vacancy Rates

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 Rate Estimates

Year	City of Tallahassee	Unincorporated Leon County	Total Leon County
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%
2020	12.5%	8.8%	11.3%
2021	12.2%	8.7%	11.1%
2022	12.5%	9.1%	11.4%
2023	12.1%	9.2%	11.2%
2024	12.3%	8.0%	11.0%

Recent Residential Vacancy Rate Estimates, 2011-2024



Source: U.S. Department of Commerce, Bureau of the Census, 2010 Decennial Census, 5-Year American Community Survey, 2011 to 2024, Table DP04.



Residential and Commercial Development

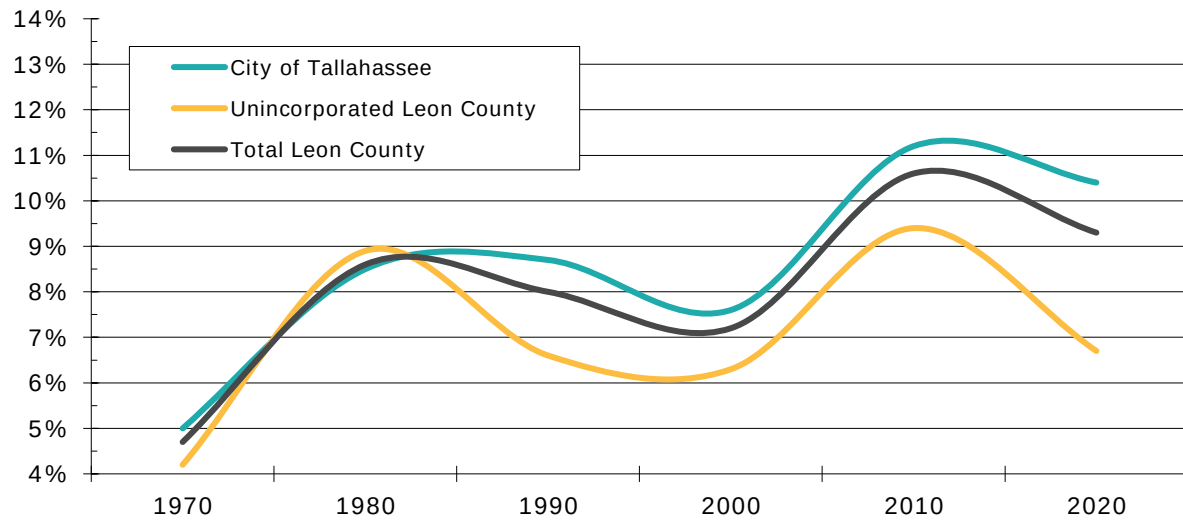
Residential Vacancy Rates

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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%
2020	10.4%	6.7%	9.3%

Historic Residential Vacancy Rates, 1970-2020



Source: U.S. Department of Commerce, Bureau of the Census, Decennial Census, Table H1



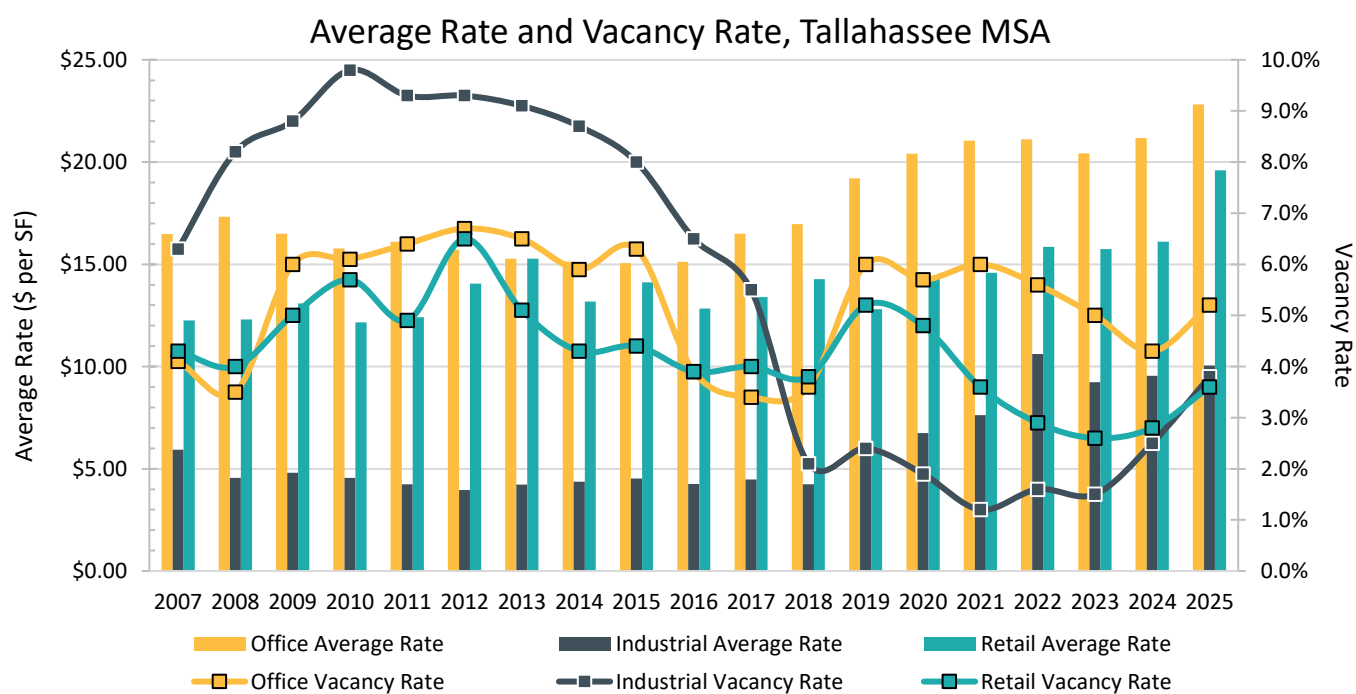
Residential and Commercial Development Office, Industrial, and Retail Market Average Lease Rate & Vacancy Rate

Trend: Between 2023 and 2025, lease rates for Office uses increased by \$2.39 (11.7%) per SF, while the average annual vacancy rate increased by 0.2 points. Industrial uses lease rates rose 8.8% between 2023 and 2025, and vacancy rates rose by 2.3 points. Lease rates for Retail uses increased by 24.45% during 2023-2025, while vacancy rates increased by 1.0 points.

Year	Office Average Rate	Office Vacancy Rate	Industrial Average Rate	Industrial Vacancy Rate	Retail Average Rate	Retail Vacancy Rate
2007	\$16.48	4.1%	\$5.94	6.3%	\$12.25	4.3%
2008	\$17.32	3.5%	\$4.56	8.2%	\$12.30	4.0%
2009	\$16.49	6.0%	\$4.80	8.8%	\$13.08	5.0%
2010	\$15.77	6.1%	\$4.55	9.8%	\$12.16	5.7%
2011	\$16.11	6.4%	\$4.24	9.3%	\$12.41	4.9%
2012	\$15.71	6.7%	\$3.96	9.3%	\$14.06	6.5%
2013	\$15.28	6.5%	\$4.22	9.1%	\$15.28	5.1%
2014	\$15.13	5.9%	\$4.37	8.7%	\$13.18	4.3%
2015	\$15.05	6.3%	\$4.52	8.0%	\$14.11	4.4%
2016	\$15.12	3.9%	\$4.26	6.5%	\$12.84	3.9%
2017	\$16.49	3.4%	\$4.48	5.5%	\$13.40	4.0%
2018	\$16.96	3.6%	\$4.24	2.1%	\$14.28	3.8%
2019	\$19.20	6.0%	\$6.08	2.4%	\$12.81	5.2%
2020	\$20.41	5.7%	\$6.75	1.9%	\$14.36	4.8%
2021	\$21.05	6.0%	\$7.63	1.2%	\$14.59	3.6%
2022	\$21.11	5.6%	\$10.61	1.6%	\$15.85	2.9%
2023	\$20.43	5.0%	\$9.24	1.5%	\$15.75	2.6%
2024	\$21.18	4.3%	\$9.55	2.5%	\$16.11	2.8%
2025	\$22.82	5.2%	\$10.05	3.8%	\$19.60	3.6%

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

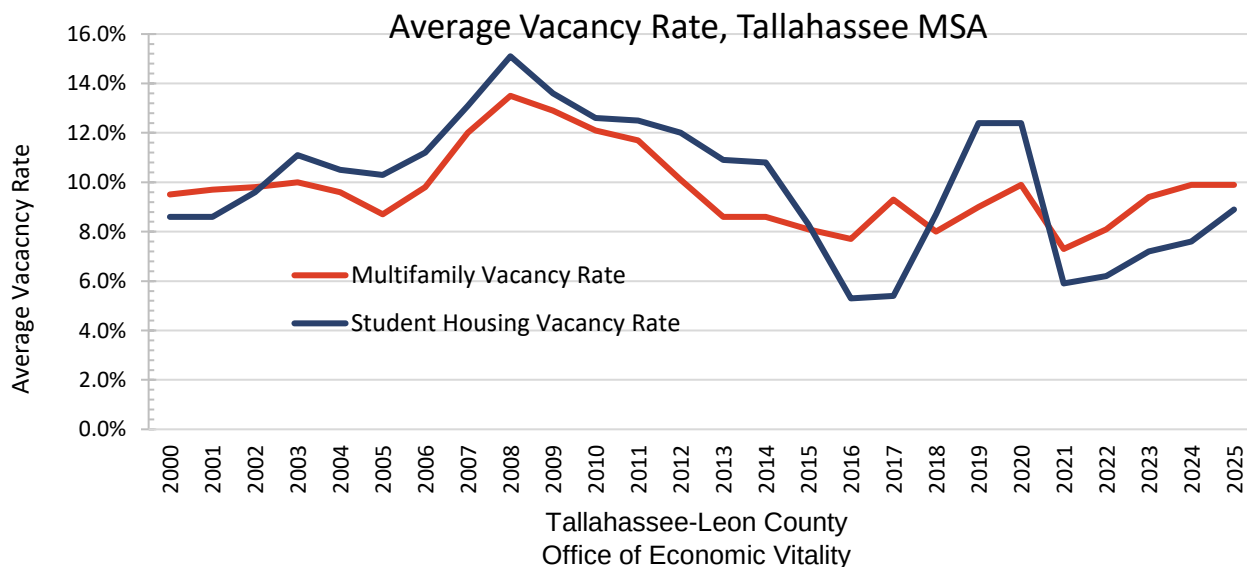
Effective Rent & Vacancy Rate

Trend: From 2020 to 2025, effective rents for Multifamily housing have increased by 25% (~4.6% per year), with an average annual vacancy rate of about 9.1%. Student housing effective rents increased by 31% during that time (an average of 5.5% per year), with an annual average vacancy rate of 8.1%.

Year	Multifamily Effective Rent (\$ per SF)	Multifamily Vacancy Rate	Student Housing Effective Rent (\$ per Bed)	Student Housing Vacancy Rate
2000	\$0.80	9.5%	\$625	8.6%
2001	\$0.82	9.7%	\$642	8.6%
2002	\$0.81	9.8%	\$632	9.6%
2003	\$0.79	10.0%	\$618	11.1%
2004	\$0.79	9.6%	\$620	10.5%
2005	\$0.80	8.7%	\$628	10.3%
2006	\$0.85	9.8%	\$665	11.2%
2007	\$0.87	12.0%	\$684	13.1%
2008	\$0.86	13.5%	\$674	15.1%
2009	\$0.84	12.9%	\$655	13.6%
2010	\$0.85	12.1%	\$661	12.6%
2011	\$0.86	11.7%	\$670	12.5%
2012	\$0.87	10.1%	\$678	12.0%
2013	\$0.88	8.6%	\$691	10.9%
2014	\$0.89	8.6%	\$681	10.8%
2015	\$0.91	8.1%	\$699	8.3%
2016	\$0.95	7.7%	\$718	5.3%
2017	\$0.97	9.3%	\$731	5.4%
2018	\$1.01	8.0%	\$728	8.7%
2019	\$1.06	9.0%	\$759	12.4%
2020	\$1.08	9.9%	\$743	12.4%
2021	\$1.19	7.3%	\$801	5.9%
2022	\$1.25	8.1%	\$888	6.2%
2023	\$1.29	9.4%	\$946	7.2%
2024	\$1.34	9.9%	\$962	7.6%
2025	\$1.35	9.9%	\$973	8.9%

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

Source: CoStar Property





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	2021	2022	2023	2024	2025
New Elevators	17	27	31	26	37	51	34	38	29	15	38	24	29	35
Total Landings	53	110	61	97	148	185	138	121	127	55	93	68	55	125

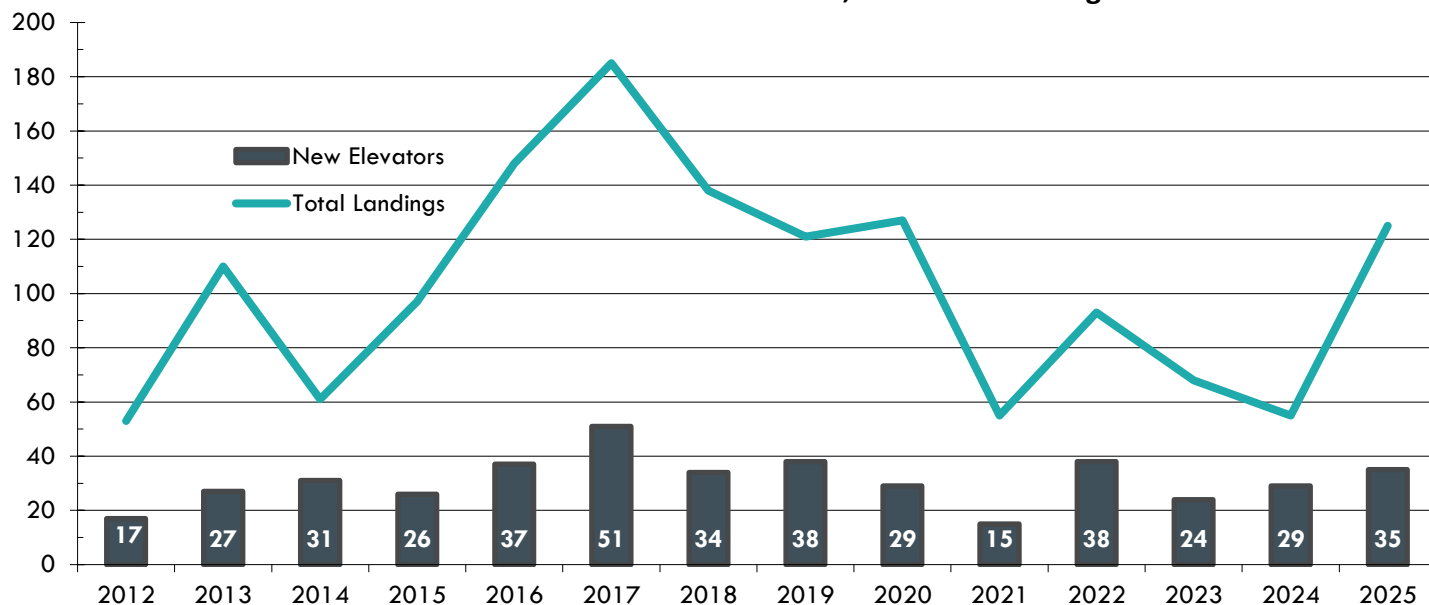
Total Landings by Building Type:

Church			6										2	
Commercial	39	54	13	31	37	53	16	51	75	13	58	21	6	44
Condominium		19	4	5	6	14		6				4		
Food Service				3			2							
FSU, FAMU, TSC		28	38	9	59	6	29		32	17		16	27	37
Hospital/Medical	10				8	67	5	9						4
Local Government	2			3	3						10		3	2
Public Lodging		5		46	31	41	86	51		23	23	27	11	20
School	2	4			4	4		4	4	2				
State Agency									16		2		6	18

*Includes Initial Installations and Relocations

Source: Florida Department of Business and Professional Regulation

New Elevators Installed or Relocated, with Total Landings





Economic Factors

Innovation:

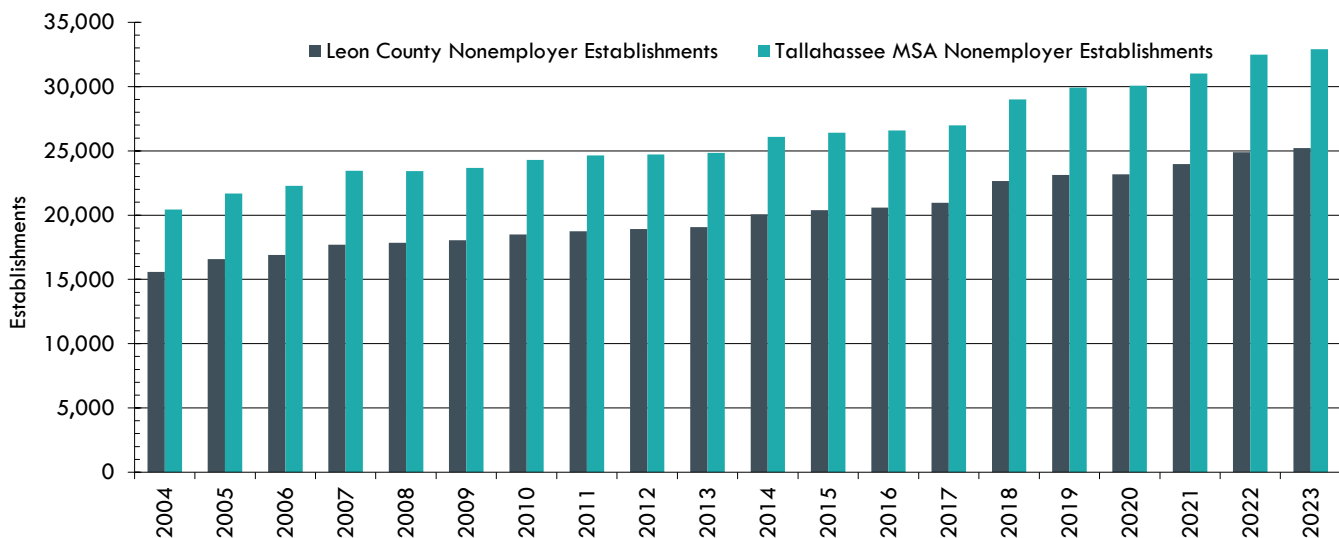
Nonemployer Statistics

Trend: Nonemployer Statistics is an annual series with data for businesses that have no paid employees and are subject to federal income tax. Most nonemployers are self-employed individuals operating as sole proprietorships, including solo entrepreneurs, which may or may not be the owner's principal source of income. The majority of all business establishments in the U.S. are nonemployers but due to their small economic impact, these firms are excluded from most other Census Bureau business statistics. Since 2020, the number of nonemployer establishments in the Tallahassee metro area has increased by 9% and total receipts have grown by 15%.

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
2019	23,134	\$933.6	29,933	\$1,182.9
2020	23,174	\$947.8	30,079	\$1,204.7
2021	23,978	\$999.5	31,008	\$1,259.3
2022	24,907	\$1,035.8	32,500	\$1,321.3
2023	25,216	\$1,048.4	32,901	\$1,382.8

Source: U.S. Census Bureau, Nonemployer Statistics

Nonemployer Establishments, 2004-2023





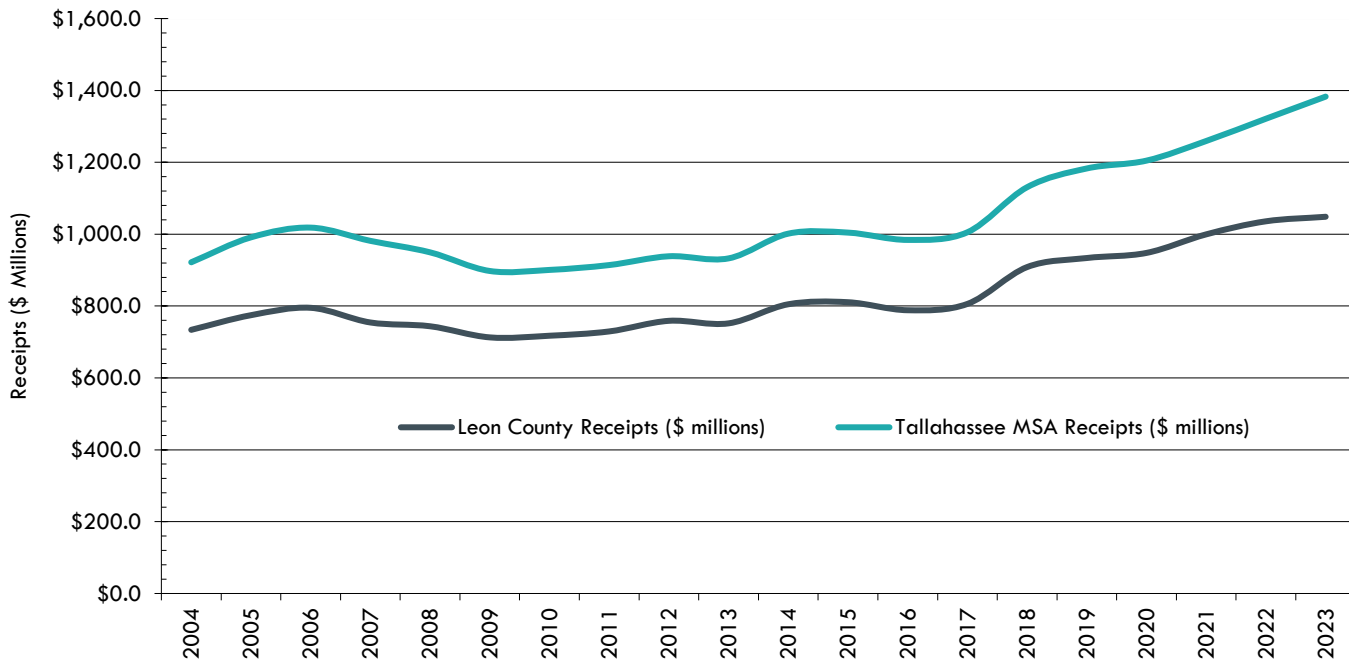
Economic Factors

Innovation:

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Nonemployer Receipts, 2004-2023





Economic Factors

Innovation:

SBIR/STTR Grants

Trend: Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) are federal programs encouraging domestic small businesses to engage in research and development with potential for commercialization. Through competitive awards, SBIR and STTR help small businesses explore their technological potential and give incentive to profit from commercialization. Since 2010, Leon County firms have been awarded over \$11 million, with 32% coming from the National Science Foundation, 32% from the Department of Defense, and 29% from the Department of Energy.

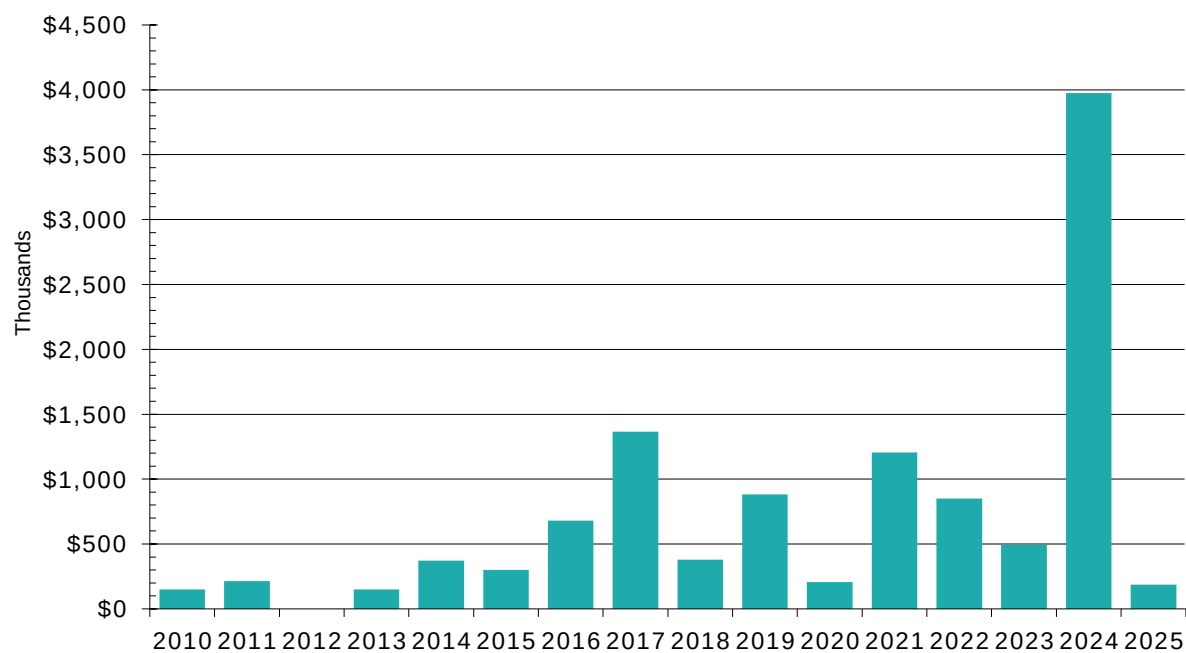
Year	Award Amount
2010	\$149,994
2011	\$213,304
2012	-
2013	\$149,681
2014	\$370,714
2015	\$299,999
2016	\$679,704
2017	\$1,365,509
2018	\$380,000
2019	\$883,247
2020	\$206,500
2021	\$1,206,499
2022	\$849,804
2023	\$495,931
2024	\$3,975,690
2025	\$187,378

Awarding Agency	Percent Awards, 2010-2025
National Science Foundation	31.8%
Department of Defense	31.6%
Department of Energy	29.0%
Department of Health and Human Services	7.6%
Total	100.0 %

Prior SBIR/STTR Awards	
Decade	Total Awards
1980s	\$294,685
1990s	\$1,038,105
2000s	\$5,041,704
2010s	\$4,492,152
2020s (partial)	\$6,921,802

Source: Small Business Innovation Research

SBIR/STTR Grant Awards, 2010-2025





Economic Factors

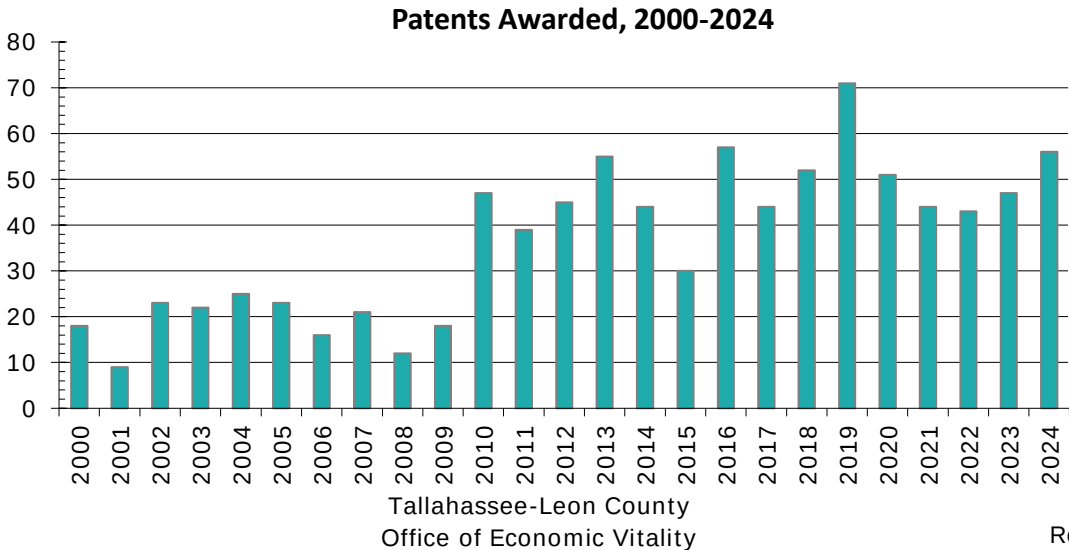
Innovation:

Patents Awarded in Leon County

Trend: The average annual number of patents awarded in Leon County during the 1990s was 11, in the 2000s it was 19, 49 in the 2010s, and 48 so far in the 2020s.

Year	Patents	Change from Prior Year
2000	18	
2001	9	-9
2002	23	14
2003	22	-1
2004	25	3
2005	23	-2
2006	16	-7
2007	21	5
2008	12	-9
2009	18	6
2010	47	29
2011	39	-8
2012	45	6
2013	55	10
2014	44	-11
2015	30	-14
2016	57	27
2017	44	-13
2018	52	8
2019	71	19
2020	51	-20
2021	44	-7
2022	43	-1
2023	47	4
2024	56	9

Source: U.S. Patent and Trademark Office





Innovation

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

Trend: Between 2020 and 2024, federally financed R&D expenditures at FSU and FAMU in all fields averaged around \$220 million per year. R&D expenditures for the National Science Foundation at FSU and FAMU accounted for an average of 31% of the total; Health and Human Services, 24%. During 2020-2024, federally financed R&D accounted for 50% of total R&D expenditures at FSU and FAMU. Total R&D expenditures increased by an average of 7.6% per year during the same period.

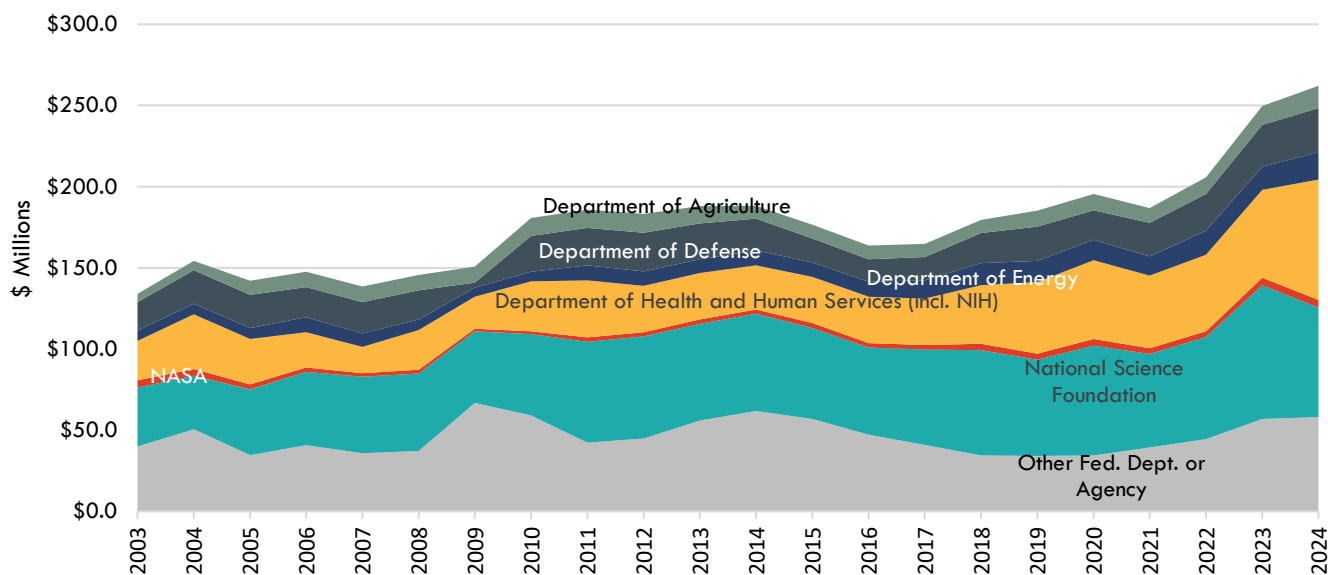
Year	Federally Financed R&D, by Agency							Total Federally Financed R&D at FSU & FAMU	Total R&D Expenditures at FSU & FAMU
	Department of Agriculture	Department of Defense	Department of Energy	Department of Health and Human Services (incl. NIH)	National Aeronautics and Space Administration	National Science Foundation	Other Fed. Dept. or Agency		
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
2020	\$9.98	\$18.21	\$12.56	\$48.58	\$4.08	\$67.51	\$34.51	\$195.43	\$391.75
2021	\$9.07	\$20.74	\$11.75	\$44.85	\$3.45	\$57.59	\$39.43	\$186.87	\$375.73
2022	\$10.26	\$22.72	\$14.64	\$47.21	\$3.54	\$62.87	\$44.47	\$205.71	\$406.66
2023	\$11.72	\$25.81	\$14.13	\$54.12	\$4.59	\$82.43	\$56.90	\$249.69	\$479.62
2024	\$13.71	\$27.20	\$16.88	\$74.02	\$4.81	\$67.37	\$58.10	\$262.09	\$529.41

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

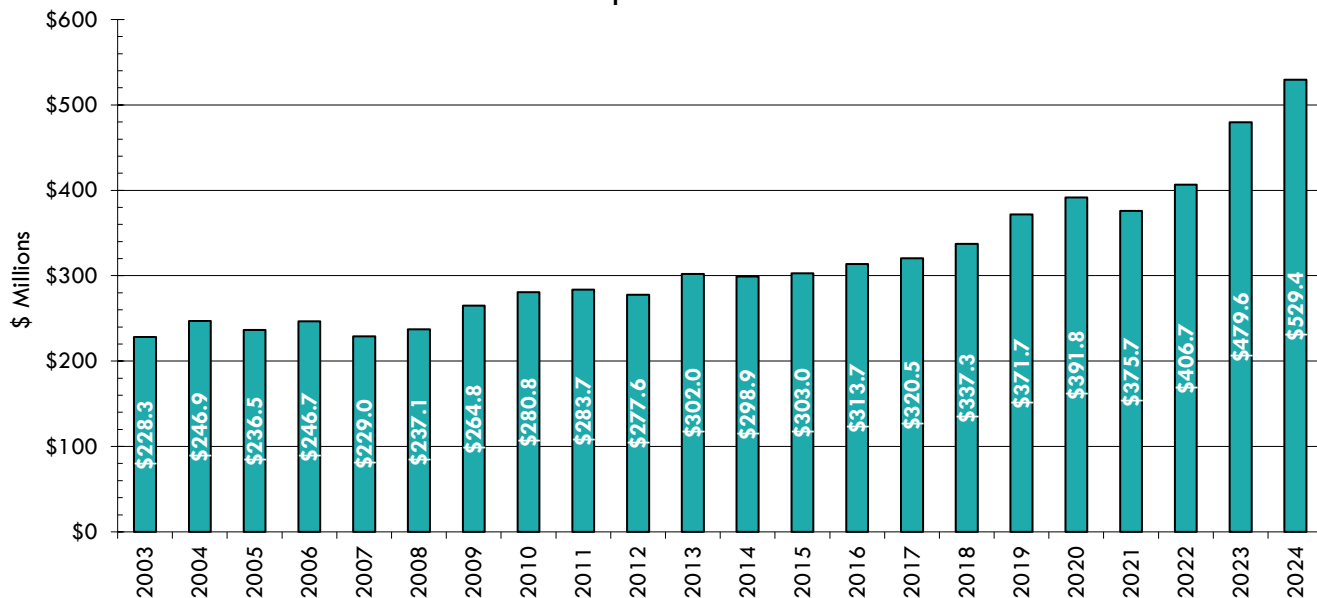
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ECONOMIC VITALITY *Innovation*

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

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



Total R&D Expenditures at FSU & FAMU





Economic Factors

Innovation:

Business Formations in Tallahassee MSA

Trend: Business Formation Statistics (BFS) compiled by the US Census Bureau measure business initiation activity and the cycle from initiation to realized business formation. BFS data gives an early look at business formation activity by covering Employer Identification Number (EIN) applications, including those associated with starting a new employer business. Industry details are unavailable at the county level. Leon County typically accounts for around 80% of business formation in the Tallahassee metro area. During 2005 to 2015, business formations in the Tallahassee metro area averaged 3,900 per year. Applications rose from 4,201 in 2016 to 9,088 in 2020. Since then, the average has been around 7,100 per year. In 2025, business applications in the Tallahassee metro area totaled 6,950, up 3.5% from 6,716 in 2024.

Year	Business Formations	Change from Prior Year	Percent Change from Prior Year
2005	3,969		
2006	4,142	173	4.4%
2007	3,873	-269	-6.5%
2008	3,765	-108	-2.8%
2009	3,541	-224	-5.9%
2010	3,672	131	3.7%
2011	3,966	294	8.0%
2012	4,020	54	1.4%
2013	4,106	86	2.1%
2014	3,822	-284	-6.9%
2015	3,863	41	1.1%
2016	4,201	338	8.7%
2017	5,076	875	20.8%
2018	6,000	924	18.2%
2019	5,376	-624	-10.4%
2020	7,038	1,662	30.9%
2021	9,088	2,050	29.1%
2022	7,522	-1,566	-17.2%
2023	7,318	-204	-2.7%
2024	6,716	-602	-8.2%
2025	6,950	234	3.5%

Source: Census Bureau, Business Formation Statistics

