

APALACHEE REGION



REGIONAL ECONOMIC DEVELOPMENT STRATEGY

Calhoun, Franklin, Gadsden, Gulf, Jackson, Jefferson,
Leon, Liberty, and Wakulla Counties

2022-2027



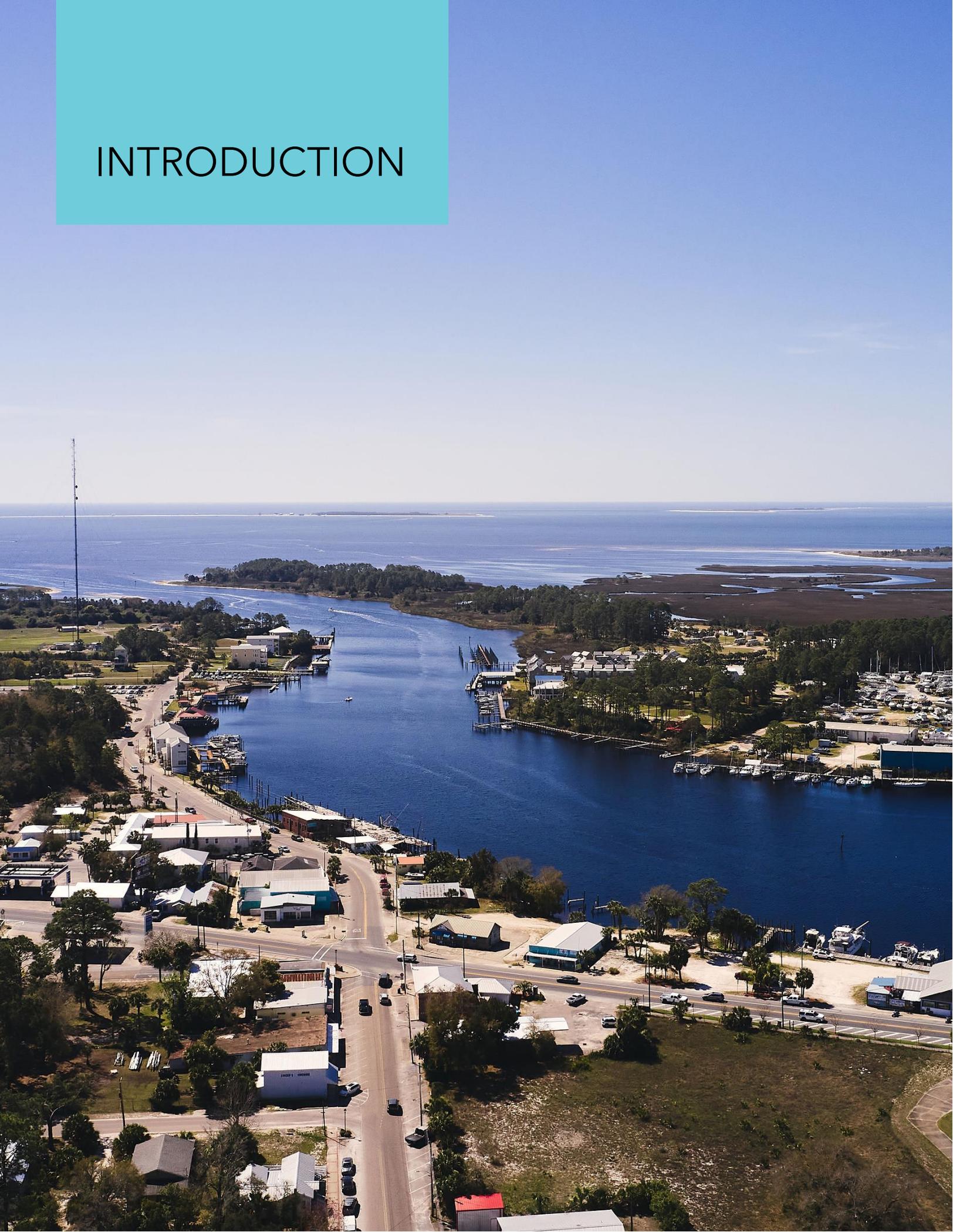
2024 UPDATE

CONTENTS

INTRODUCTION.....	3
EXECUTIVE SUMMARY	4
STRATEGY ALIGNMENT.....	4
OVERVIEW OF CHANGES IN THE 2024 UPDATE	5
BACKGROUND.....	6
GEOGRAPHY	7
DISASTER RECOVERY	8
HURRICANE MICHAEL (2018)	8
COVID-19 PANDEMIC (2020)	10
ECONOMIC RESILIENCE	11
REGIONAL DATA-DIVE	12
POPULATION AND WORKFORCE	12
KEY EMPLOYMENT CONCENTRATIONS	16
FASTEST GROWING SECTORS	16
HIGHEST PAYING SECTORS	18
FASTEST GROWING WAGES	18
STRATEGIC TAKEAWAYS AND DEVELOPMENT IMPLICATIONS.....	19
BUSINESS AND INDUSTRY	25
QUALITY OF LIFE	32
SWOT ANALYSIS	34
ACTION PLAN: GOALS AND OBJECTIVES.....	37
VISION	38
GOALS.....	38
OBJECTIVES.....	39
EVALUATION METRICS.....	43
ACKNOWLEDGEMENTS.....	46



INTRODUCTION



EXECUTIVE SUMMARY

The 2022-2027 Apalachee Regional Economic Development Strategy was developed in accordance with guidelines established by the U.S. Department of Commerce’s Economic Development Administration (EDA). The document development process was led by the Apalachee Regional Planning Council (ARPC), which serves as the Apalachee Region’s EDA-designated Economic Development District (EDD), in collaboration with the ARPC Economic Development Committee.

The Action Plan builds off the ambitions of the 2017-2022 strategy, which held the following goals: enhance interconnectivity and collaboration; fortify and animate Apalachee strengths; bring new voices to the economic development drawing board. Momentum to implement these goals was halted by two major disasters that impacted the entire Apalachee Region—Hurricane Michael and COVID-19. Therefore, **the focus of this strategy will be to revamp, center, and intensify economic development activities through the following goals:**

1. Transformative Regional Collaboration
2. Economic Diversity, Equity, and Stability
3. Dynamic Workforce
4. Resilient Infrastructure
5. Affordable Housing
6. Enhanced Quality of Life

What is a Regional Economic Development Strategy?

The Regional Economic Development Strategy is a goal-oriented plan for regional economic development and is the result of a regionally owned planning process designed to build capacity and guide the economic prosperity and resilience of a region.

It is a key component in establishing and maintaining a robust economic ecosystem by helping to build regional capacity that contributes to community success. It provides a vehicle for stakeholders to engage in a meaningful conversation and debate about what capacity building efforts would best serve economic development in the region.

STRATEGY ALIGNMENT

In order to foster a collaborative environment with shared goals across partner organizations, efforts have been made to align the 2022-2027 Apalachee Regional Economic Development Strategy with other regional and state plans, including the following:

- Florida’s Great Northwest – Northwest Florida Forward Plan (2017)
- Tallahassee-Leon County Office of Economic Vitality – Strategic Plan (2022)
- CareerSource Capital Region – Strategic and Operating Plan (2020)
- CareerSource Chipola – Local Workforce Services Plan (2020)
- Florida Department of Economic Opportunity – Strategic Plan for Broadband (2022)
- State of Florida – Strategic Plan for Economic Development (2018)

OVERVIEW OF CHANGES IN THE 2024 UPDATE

The focus of the 2024 update of the 2022-2027 Regional Economic Development Strategy was on making the following changes:

- Removal of Opportunity Zones section due to the change in federal priorities of the U.S. Economic Development Administration
- Update to branding (colorway, typology, etc.) for consistency with ARPC re-branding
- Update to data sets and charts with any new year(s) of data that have become publicly available since the last edition of the Strategy

Additionally, for this 2024 update there has been an effort to revitalize and expand the Strategy Committee, whose contributions and input are recognized in the Acknowledgements section on the final page of this Strategy.

BACKGROUND

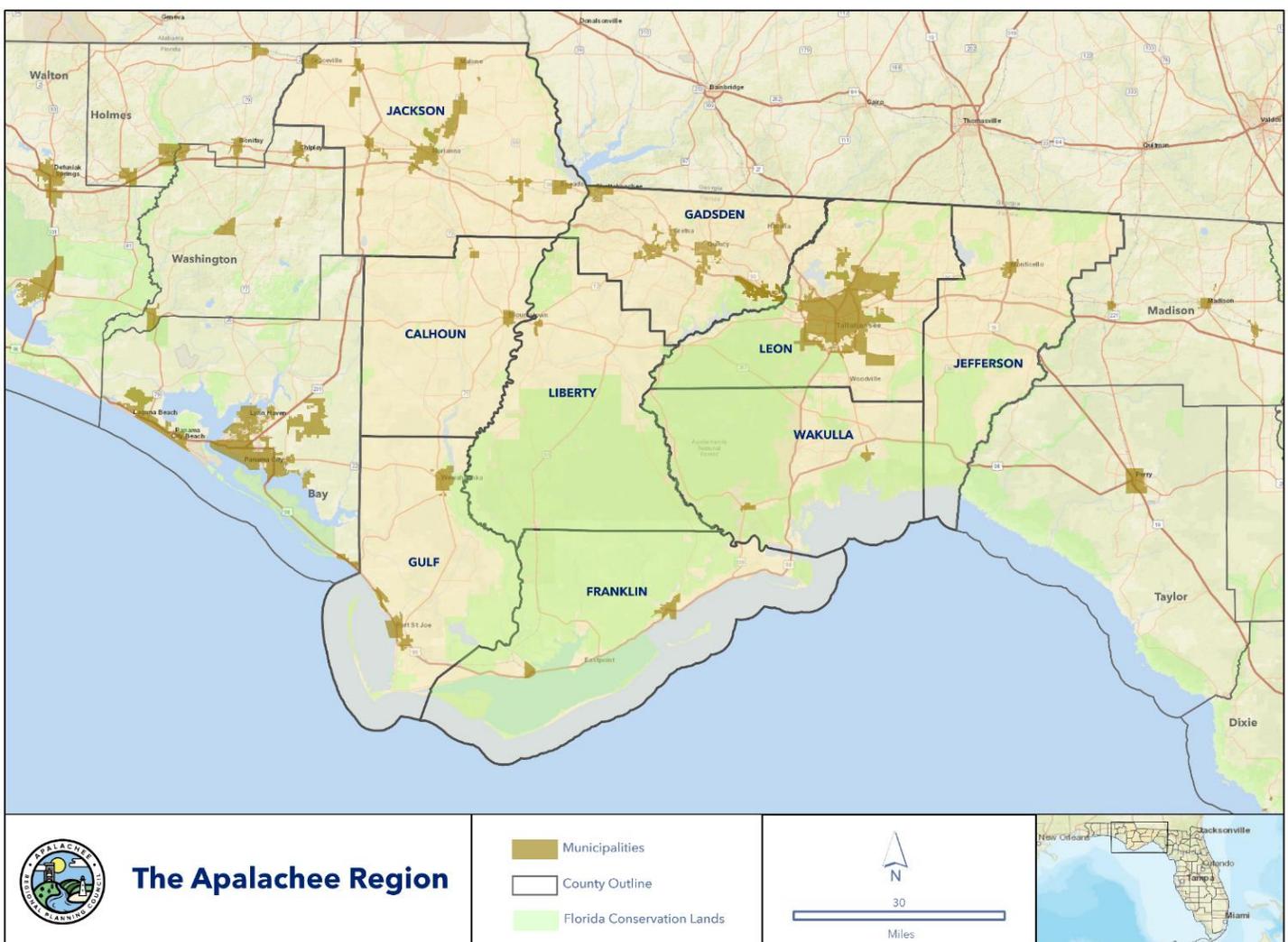


Image: Living Shoreline ("Franklin-98")
in Franklin County

GEOGRAPHY

The Apalachee Region of Northwest Florida consists of nine counties: Calhoun, Franklin, Gadsden, Gulf, Jackson, Jefferson, Leon, Liberty, and Wakulla counties. Eight rural counties surround the Region’s metropolitan center—Tallahassee/Leon County—in the eastern half of the Florida Panhandle. The counties stretch from the Gulf of Mexico north to the Alabama and Georgia state lines. The Apalachee Region measures approximately 120 miles from east to west. Interstate-10 and the CSX railroad cross the northernmost counties, connecting to the southwestern Port of Port St. Joe in Gulf County via the Apalachicola Northern railroad. Highway 98 is the major transportation corridor along the southern coastline. Tallahassee International Airport and several regional airports also populate the transportation system.

Franklin, Liberty, and Wakulla counties all feature significant coverage from public lands where state/national forests and wildlife refuges are located. Across the Apalachee Region, tree coverage and agricultural lands are plentiful. The Region is ecologically diverse as well as diverse at a community and needs level. **By harnessing shared goals and the idea of regionalism—all counties working together to increase regional impact—the Apalachee Region can translate its geography into a more sustainable economic future.**

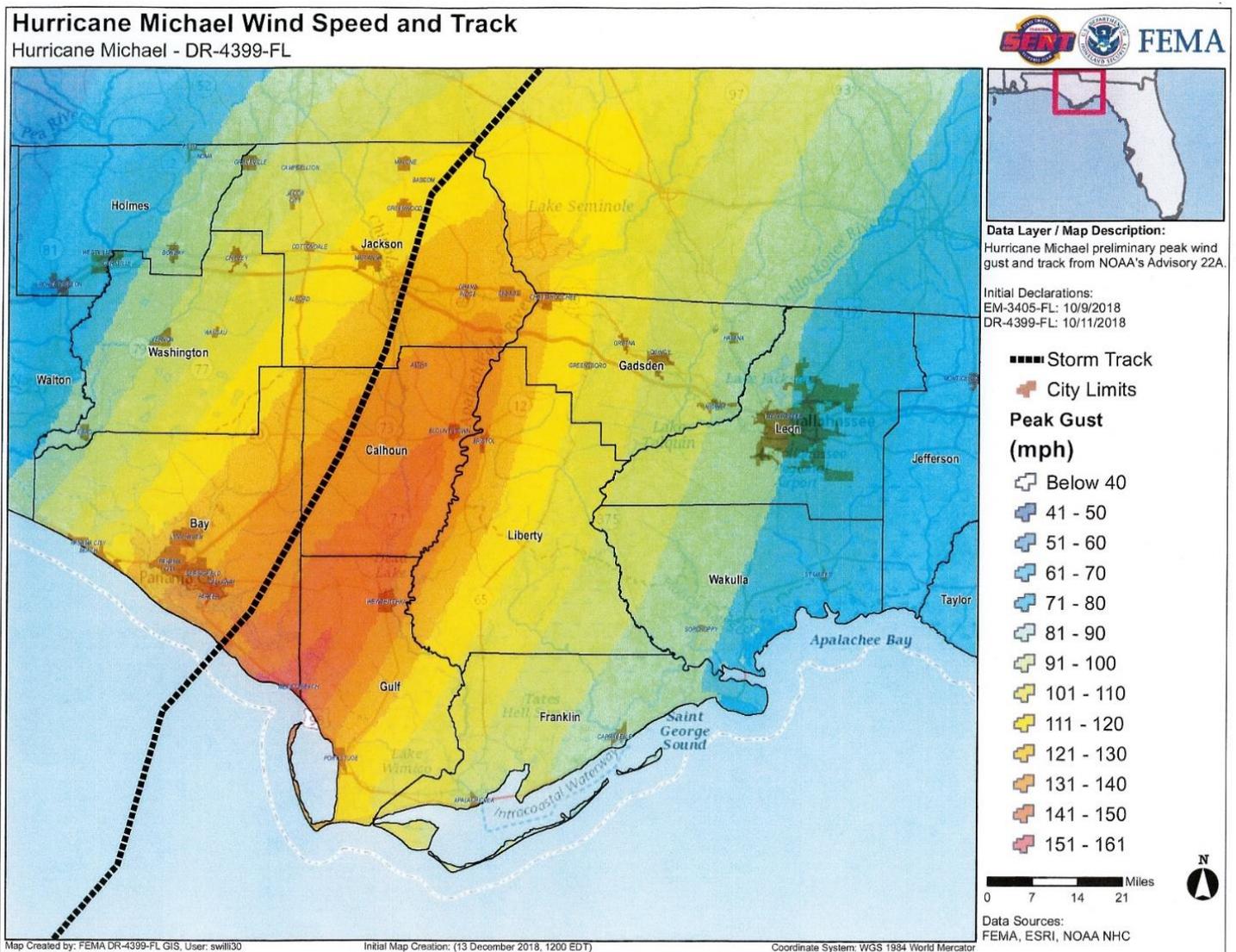


A LOOK BACK: DISASTER RECOVERY

HURRICANE MICHAEL (2018)

Hurricane Michael made landfall on the Florida Panhandle in Bay County—just beyond the Apalachee Region—on October 10, 2018, as a category 5 storm. The hurricane’s path diagonally crossed the Apalachee Region and left a level destruction that had not been experienced by the Region in over 100 years. Hurricane Michael severely impacted agriculture, transportation, and housing, and rural counties continue to work towards economic recovery.

Hurricane Michael awakened stakeholders—residents, businesses, and government—to the need for disaster preparedness and economic resiliency activities. Many of the goals and strategies contained within this Strategy have been informed by the experience of Hurricane Michael.



Source: Federal Emergency Management Agency (FEMA), 2018.

ESTIMATED CROP LOSSES FROM **HURRICANE MICHAEL**

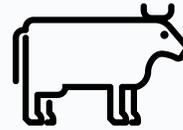
BY COMMODITY GROUP



FORESTRY
\$1.3 BILLION



COTTON
\$50M



CATTLE
\$43M



PEANUTS
\$23M



NURSERIES
\$16M



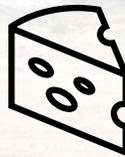
**POULTRY &
EGGS, \$10M**



VEGETABLES
\$8.6M



**OTHER FIELD
CROPS, \$7.3M**



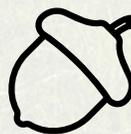
DAIRY
\$6.4M



AQUACULTURE
\$5M



FRUITS
\$4.4M



TREE NUTS
\$4.4M



APIARY
\$2M

COVID-19 PANDEMIC (2020)

The COVID-19 pandemic began in March 2020 and forced a shift in the regional economy, impacting business health and the workforce. As a result of the pandemic, the “Great Reassessment” began, in which workers displaced by widespread layoffs and illness chose not to return to their former jobs or even to their former occupations. Instead, new business formations have increased dramatically.

THE GREAT REASSESSMENT

At the beginning of the pandemic, in April 2020, the Florida unemployment rate rose to 14% as companies struggled to stay afloat and keep employees on staff.¹ Although the unemployment rate declined to 3.5% in January 2022, the labor market is still experiencing a labor shortage in industries most impacted by the pandemic: accommodation and food services, retail trade, health care and social assistance, and transportation and warehousing.² Although job opportunities and wages have increased throughout 2021, people are not returning to work because they are rethinking their commitment to their jobs. Covid-19 exacerbated problems between consumers, employers, and employees, and because of this, the Florida and U.S. economy are experiencing a great reassessment, also known as frictional unemployment.

Frictional unemployment is a form of unemployment that involves the workforce choosing to leave their current jobs for new ones or pursuing skill sets needed for different roles. This phenomenon results from a combination of employees seeking a career change, more workforce opportunities, and the psychological impacts of Covid-19. According to the Washington Post, many workers “are reporting high levels of burnout, causing some to seek a new career path. There has also been a wave of retirements as workers over 50 quit because they do not want to return to teaching, home health care, or other front-line jobs.”³ The way employers handled the health and lives of their employees during Covid-19 has severed employers’ relationships with employees. Workers can leave their current positions and wait for other employment or learn another skill set because of increased opportunities.

UNEMPLOYMENT AFTER COVID-19

Since business closures began, Florida has experienced labor market changes. The unemployment rate in Florida declined to 4.5% by December 2021. The unemployment rate is even lower in much of the Apalachee Region and continues to stabilize.

New Florida businesses are having problems attracting staff despite using job fairs, wage increases, and offering interview incentives to motivate workers back to work. Workers have more options than in years past, including retailers that guarantee a \$15 per hour starting wage and gig economy jobs that offer more flexibility.⁴ As wages are increasing, people are not returning to work because they are rethinking their relationship with their choice of work.

¹https://data.bls.gov/timeseries/LASST120000000000004?amp%253bdata_tool=XGtable&output_view=data&include_graphs=true

² <https://eig.org/news/the-startup-surge-business-formation-in-2021-on-pace-to-break-record>

³ <https://www.washingtonpost.com/business/2021/05/07/jobs-report-labor-shortage-analysis/>

⁴ <https://www.businessinsider.com/mcdonalds-pays-50-for-job-interviews-highlighting-hiring-struggles-2021-4>

ECONOMIC RESILIENCE

The development of a resilient regional economy is a priority for the Apalachee Regional Planning Council and the EDA. Possessing a resilient economy reduces the amount of time needed for the economy to recover from unexpected events like natural, biological, or economic disasters such as Hurricane Michael or the COVID-19 pandemic. Other recent disasters that have impacted the Region include the 2008 recession, BP Deepwater Horizon oil spill (2010), fires, flooding, tornados, and other hurricanes and storms.

A resilient economy can also help the Apalachee Region to persevere through economic shifts, such as the decline of an industry or closure of a major employer. Moreover, it provides the capacity to withstand future events, bouncing back quicker and in a manner that is better positioned for future unknowns. The concept of resiliency can be built into many subsets of the economy, including industry composition and diversity, workforce, income and earnings, affordability of goods and services, health, housing, and infrastructure.

As the Apalachee Region grows, it is essential that each major economic component is analyzed and addressed through a lens of equity and sustainability to ensure that the growth and development occurring across the Region serves to enhance regional economic resiliency.

Areas to Address:

- Persistent Regional Challenges
- Industry Diversification
- Resilient Infrastructure
- Workforce Development
- Broadband Access
- Small Business Support
- Innovation and Technology
- Healthy Communities
- Pre-Disaster Planning
- Network Strengthening and Information Sharing

These targeted areas to address in order to enhance regional economic resiliency are incorporated into the Action Plan section of this Regional Economic Development Strategy.

REGIONAL DATA-DIVE

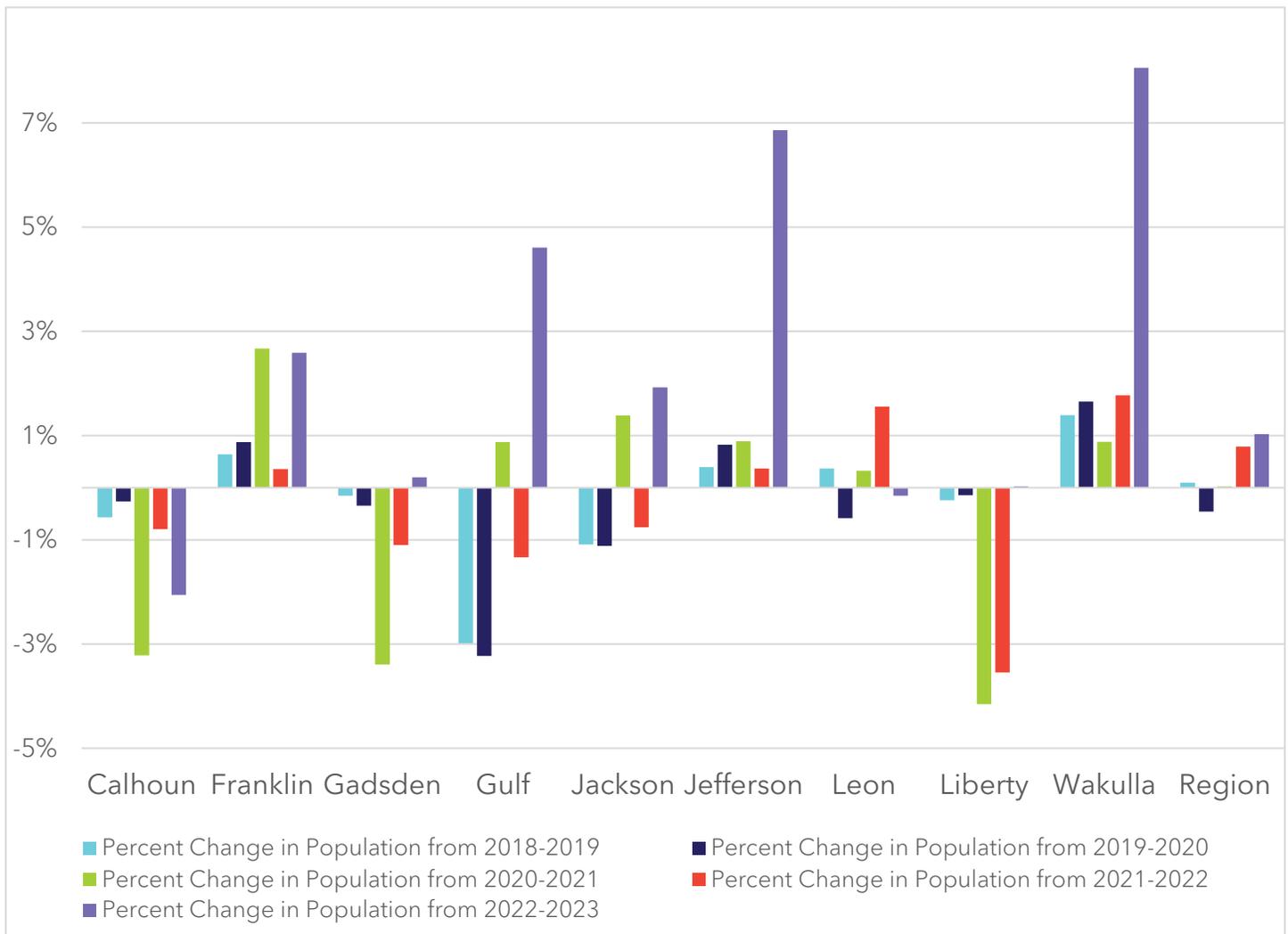
This data section serves to lay the foundation for understanding the Apalachee Region in 2022 in order to help pinpoint goals and objectives, as contained within this strategy's Action Plan, for moving forward. Factors ranging from demographics to education to industry health help gauge the economic foundation of the Apalachee Region.

Data insights are categorized under the following headers:

- Population and Workforce
- Business and Industry
- Quality of Life

POPULATION AND WORKFORCE

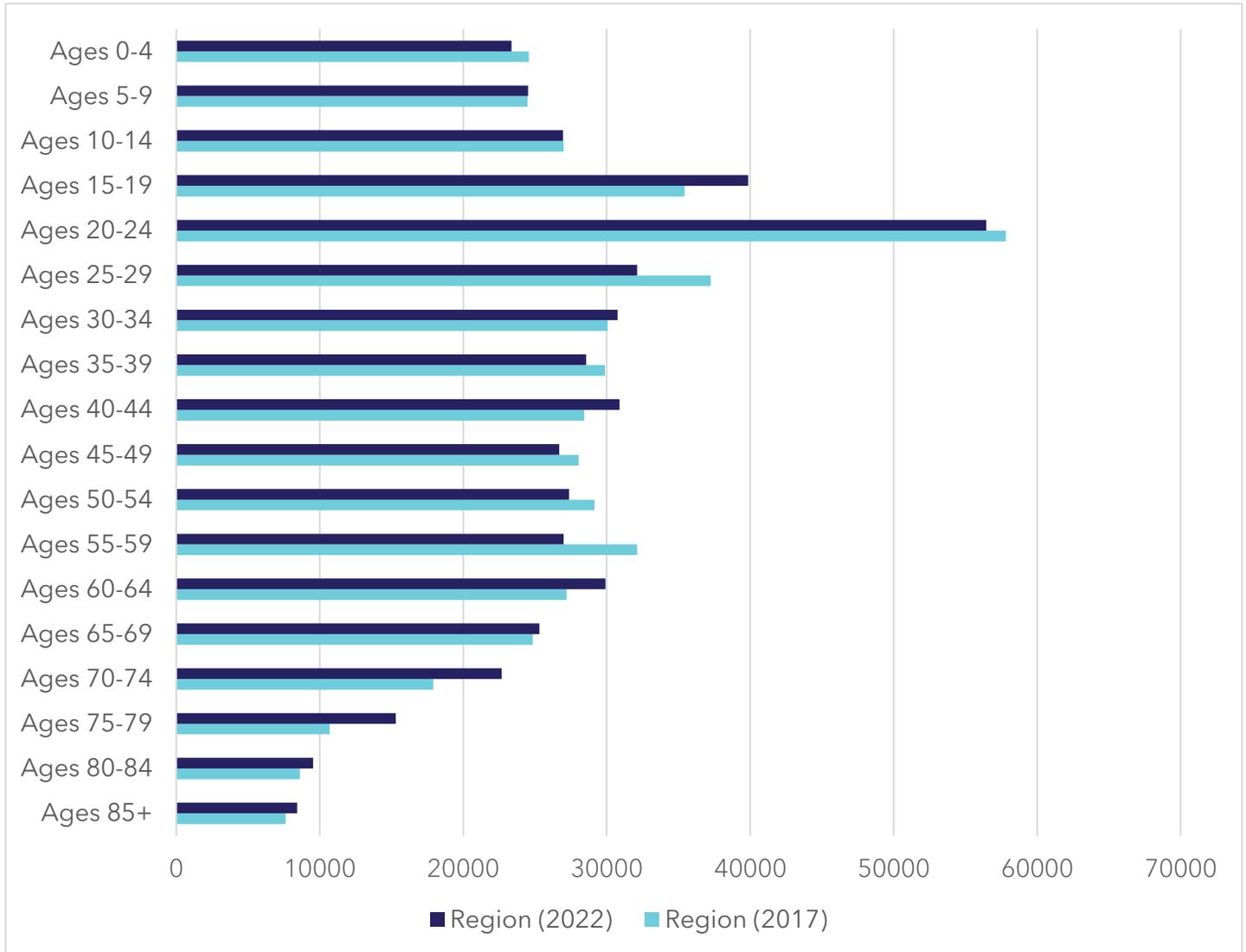
PERCENT CHANGE IN REAL AND PROJECTED POPULATION (2018–2023)



Source: American Community Survey 5-Year Estimates & BEBR Projection

The graph on the previous page tracks population changes across various counties over several years. Counties like Wakulla, Jefferson, and Gulf have seen notable population growth, likely tied to development or migration trends.

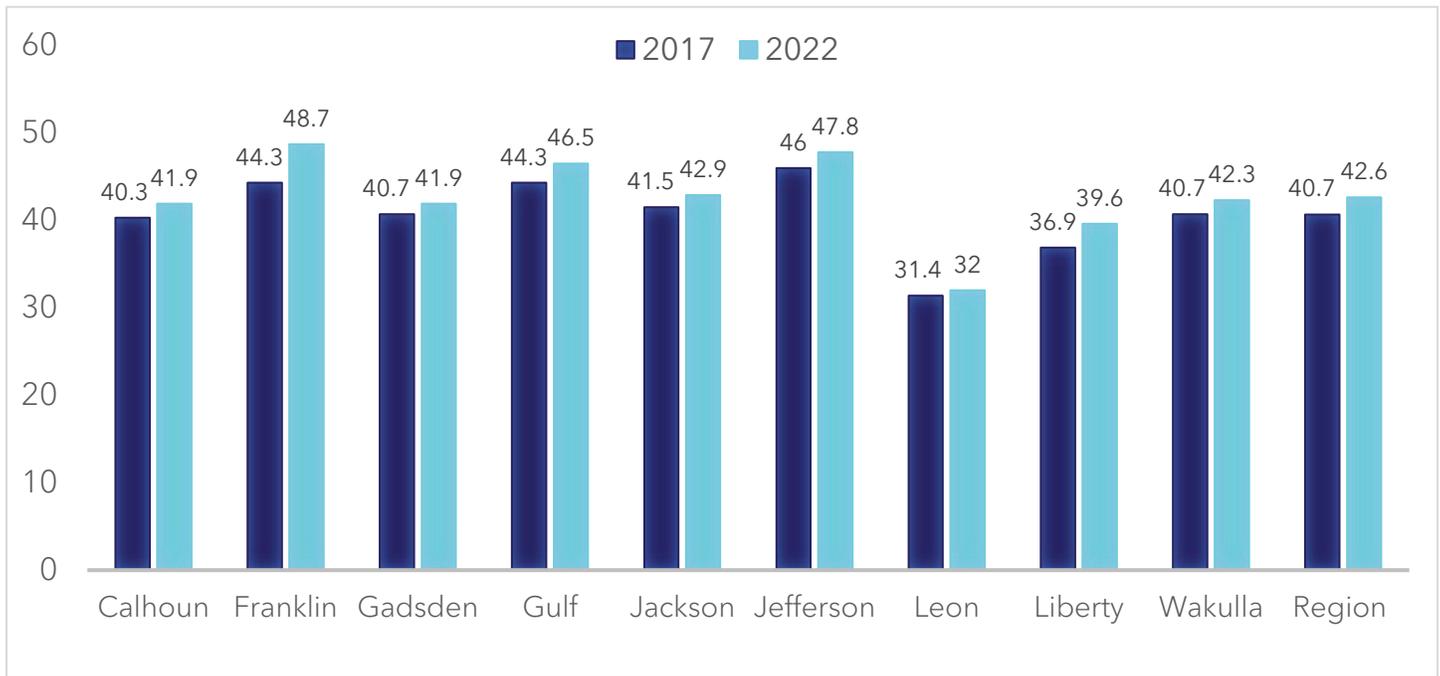
REGIONAL POPULATION BY AGE-COHORT (2015, 2020)



Source: American Community Survey 5-Year Estimates

The chart above displays the distribution of population across different age groups in each county. An aging population in most counties suggests future challenges in workforce availability and healthcare infrastructure. Younger populations are concentrated in Leon County, likely due to the presence of universities and related opportunities.

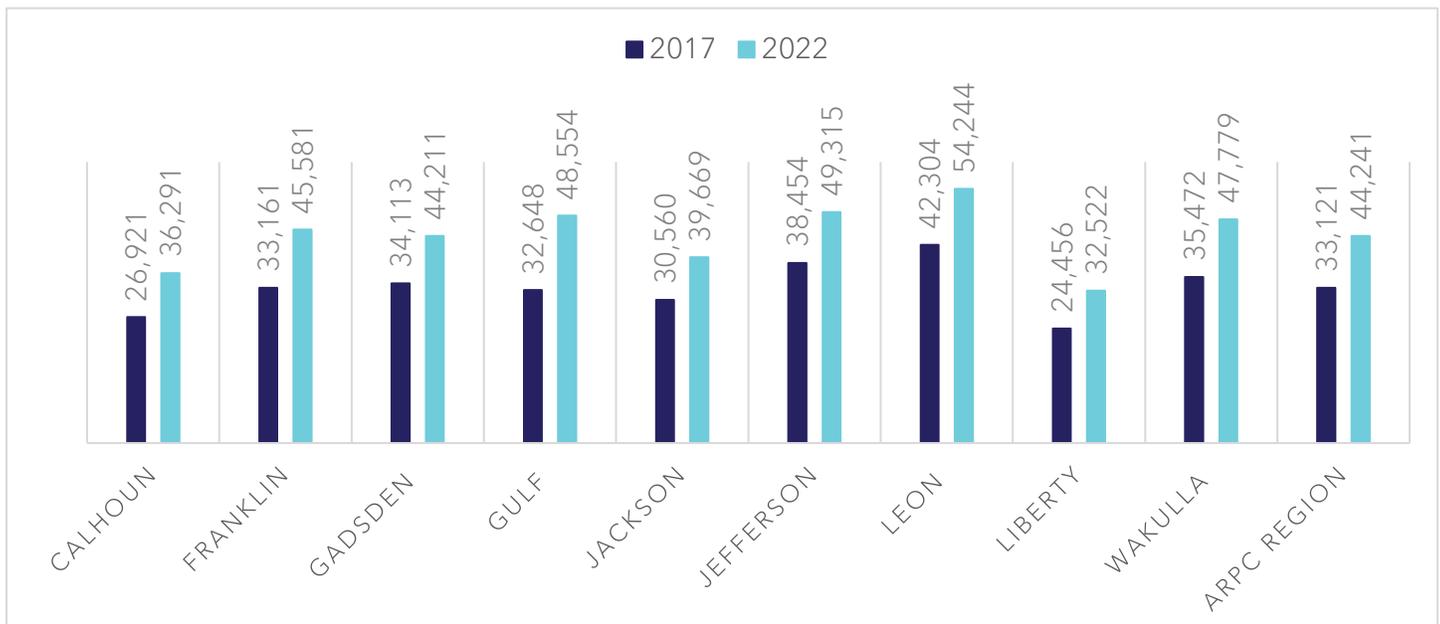
MEDIAN AGE (2017, 2022)



Source: American Community Survey 5-Year Estimates

The regional median age has increased, indicating a trend of an aging population across the board. Counties like Franklin and Jefferson have higher median ages, reflecting their appeal to retirees or the outmigration of younger workers.

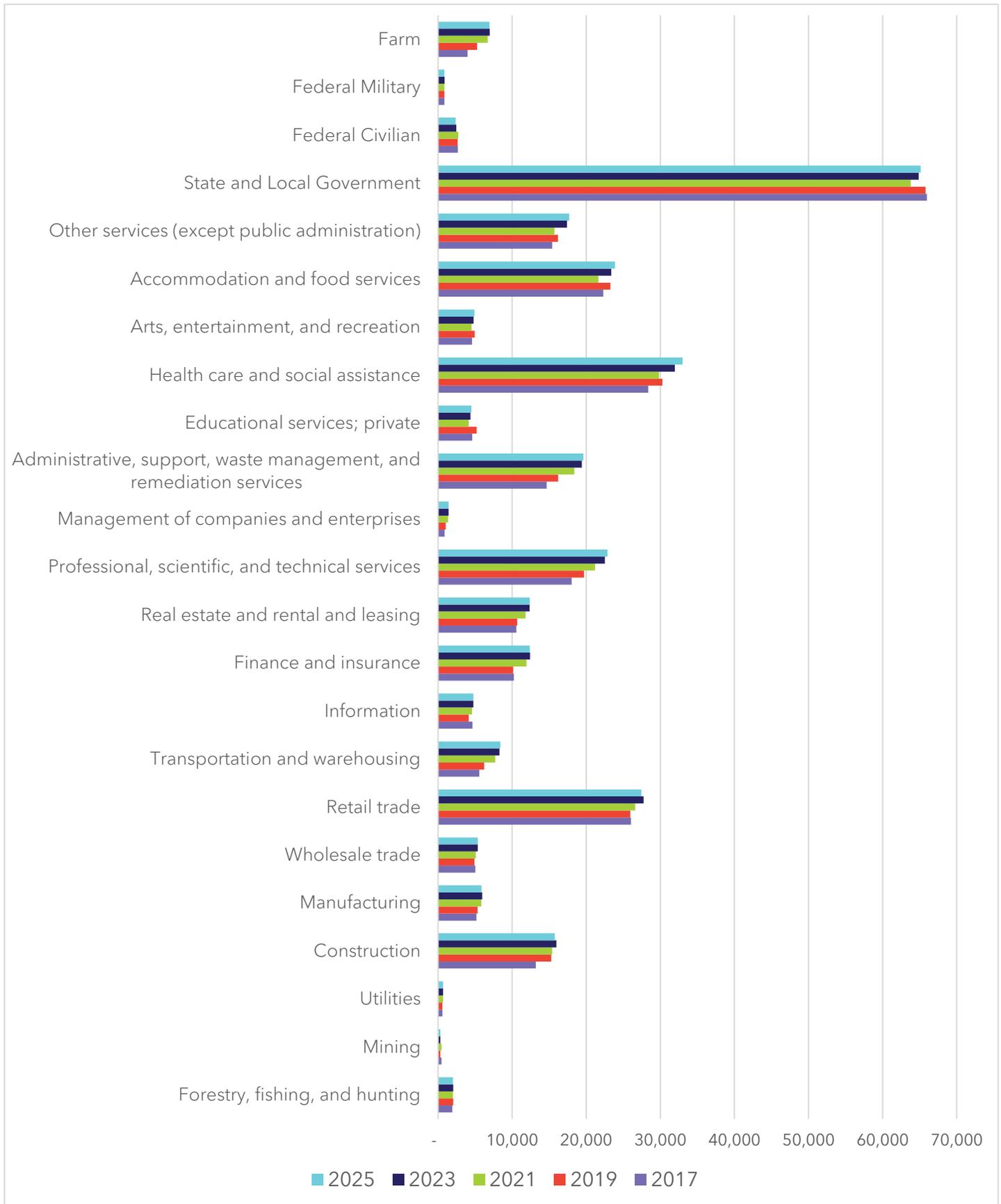
PER CAPITA INCOME (2017, 2022)



Source: Bureau of Economic Analysis

This graph presents per capita income trends across several counties from 2017 to 2022. While incomes have risen across all counties, the rate of increase varies significantly, with some counties lagging behind in economic growth. The rise in per capita income, particularly in Franklin and Jackson counties, suggests a positive trend in economic wellbeing but may also reflect increased living costs.

EMPLOYMENT BY OCCUPATION, IN THOUSANDS (2017-2025)



Source: REMI PI+

KEY EMPLOYMENT CONCENTRATIONS

STATE AND LOCAL GOVERNMENT



The dominance of employment in this sector is a reflection of the Region's reliance on public services, especially given that Leon County houses the state capital, Tallahassee. This concentration suggests stability, as government jobs tend to be less sensitive to market fluctuations. Government jobs often act as an anchor for regional economies, providing a steady base for spending in other sectors like retail and healthcare. This might explain why retail trade and healthcare also see high employment numbers.

HEALTHCARE AND SOCIAL ASSISTANCE



With the Region's aging population and its rural composition, the demand for healthcare workers continues to rise. The sector's prominence in both employment concentration and as a high-paying industry reflects its role as a critical economic driver. Leon County, with major healthcare providers, likely serves as the healthcare hub for the surrounding rural areas, fueling employment in this sector.

RETAIL TRADE



Retail's high employment shows a service-driven economy, catering to both local consumers and the rural population. However, retail jobs are often lower-wage and part-time, highlighting a gap between job availability and wage growth, making retail less attractive for long-term economic development unless paired with training and advancement opportunities.

FASTEST GROWING SECTORS

FARM



The growth in farm employment and wages highlights the importance of agriculture in this predominantly rural region. Counties like Jackson, Liberty, and Gadsden have strong agricultural traditions, which are likely to contribute to these gains. Increased wage growth in farming may reflect a combination of increased mechanization, efficiency, and demand for locally sourced food, especially post-pandemic.

MANAGEMENT COMPANIES AND ENTERPRISES



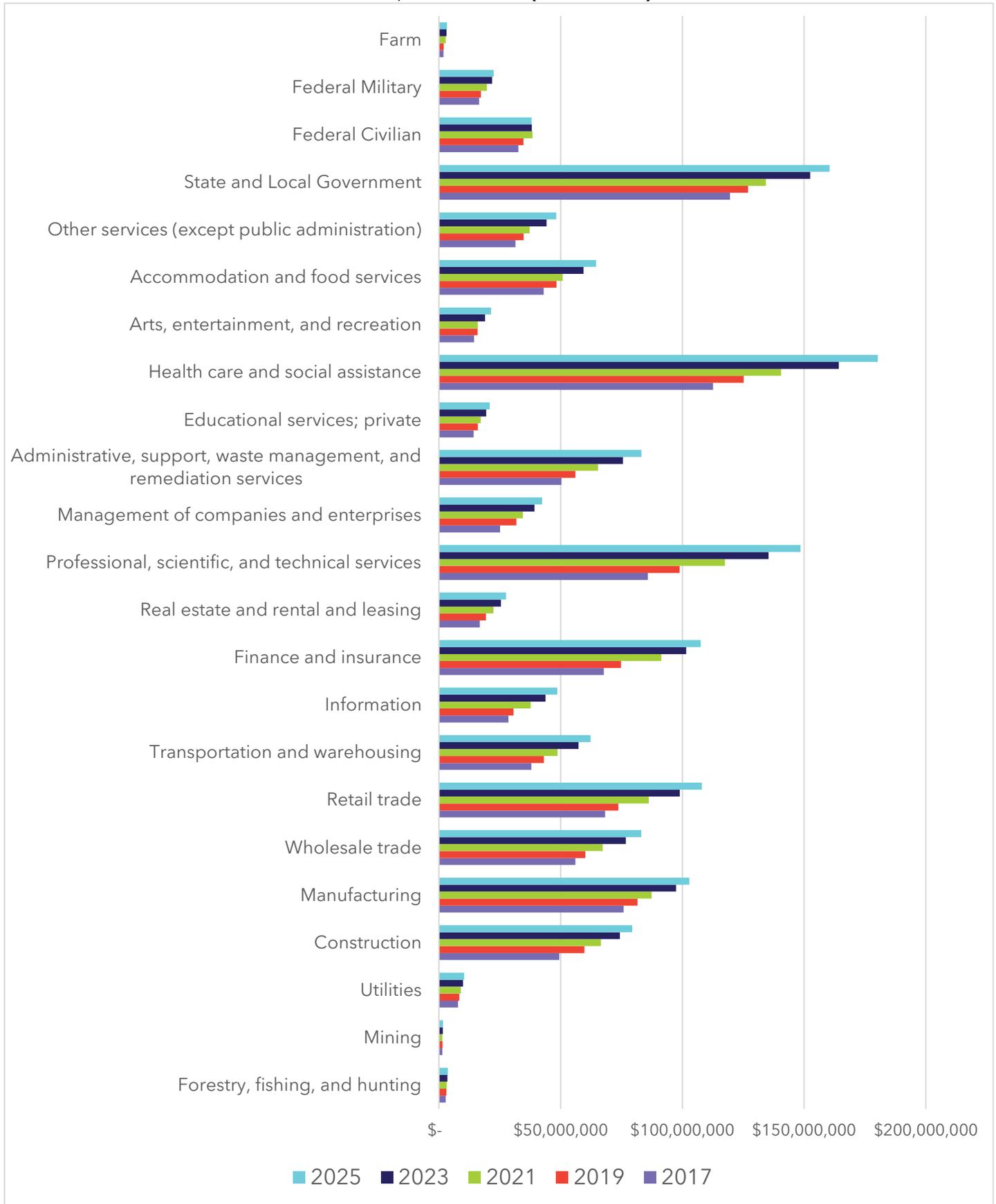
Though a relatively small sector, its fast growth suggests an increase in higher-level administrative jobs or regional headquarters establishing themselves in the area. This could be indicative of broader business-friendly policies or economic diversification strategies attracting companies to centralize their operations here.

TRANSPORTATION AND WAREHOUSING



The growth of this sector aligns with the Region's geographic positioning, especially in counties like Jackson and Gadsden, which have access to major highways and transportation routes. This growth suggests the area is becoming more important for logistics, storage, and distribution.

AVERAGE COMPENSATION BY INDUSTRY, IN BILLIONS (2021-2023)



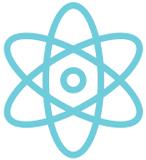
Source: REMI PI+

HIGHEST PAYING SECTORS



HEALTHCARE AND SOCIAL ASSISTANCE

Healthcare remains not only a large employer but also one of the highest-paying sectors, which is expected given the specialized skill sets required, particularly in medical, nursing, and social work roles. This is crucial for the Region, as it provides a path to higher wages for those with the necessary education or training.



PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

The presence of this sector as one of the highest-paying reflects its role in bringing specialized, knowledge-based jobs to the Region. The sector includes engineering, consulting, IT, and scientific research, which are high-demand skills often associated with urban centers like Tallahassee, the region's hub for education, government, and research.



STATE AND LOCAL GOVERNMENT

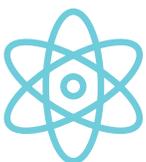
The prominence of state and local government in both employment and pay suggests that public sector jobs in this Region are relatively well-compensated. This further strengthens the role of government as a stabilizing force in the regional economy.

FASTEST GROWING WAGES



FARM

Rapid wage growth in farming may be due to technological advancements and increased efficiency, requiring fewer but more skilled workers. This trend suggests that farming, though not typically seen as a high-paying sector, is evolving in response to market demands, and workers in this sector may increasingly require technical knowledge or specialized skills.



PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

Fast wage growth in this sector could be attributed to increasing demand for specialized skills such as data analysis, IT, and legal expertise. As the regional economy diversifies and more businesses require technical services, salaries rise to attract and retain talent.



INFORMATION

Wage growth in the information sector highlights a potential growth area in technology, media, telecommunications, or data services. This could reflect both the increasing importance of digital infrastructure and the demand for information technology services, especially as more organizations in both the private and public sectors digitize their operations.

STRATEGIC TAKEAWAYS AND DEVELOPMENT IMPLICATIONS

DIVERSIFICATION OPPORTUNITIES

The growth in agriculture and transportation presents a unique opportunity to invest in value-added industries, such as food processing, agricultural technology, and logistics hubs. The Region could benefit from incentives that encourage innovation in farming or facilitate the establishment of regional distribution centers to further expand transportation and warehousing. Additionally, as healthcare remains a leading employment and wage generator, focusing on workforce development in nursing, elder care, and healthcare management will ensure that this sector continues to grow. Additionally, fostering connections between higher education institutions and professional services can create a more resilient knowledge economy.

WORKFORCE DEVELOPMENT

Since wage growth is fastest in the farming, professional services, and information sectors, workforce development programs should focus on these areas to prepare workers for higher-paying jobs. Technical training in agricultural innovation, digital skills, and information technology will be critical to capturing the benefits of wage growth in these sectors. Furthermore, while retail is a major employer, wages are typically low and the sector is vulnerable to automation and e-commerce. A strategy to improve retail wages could include worker training programs that help employees transition to higher-paying roles in management or related sectors like logistics.

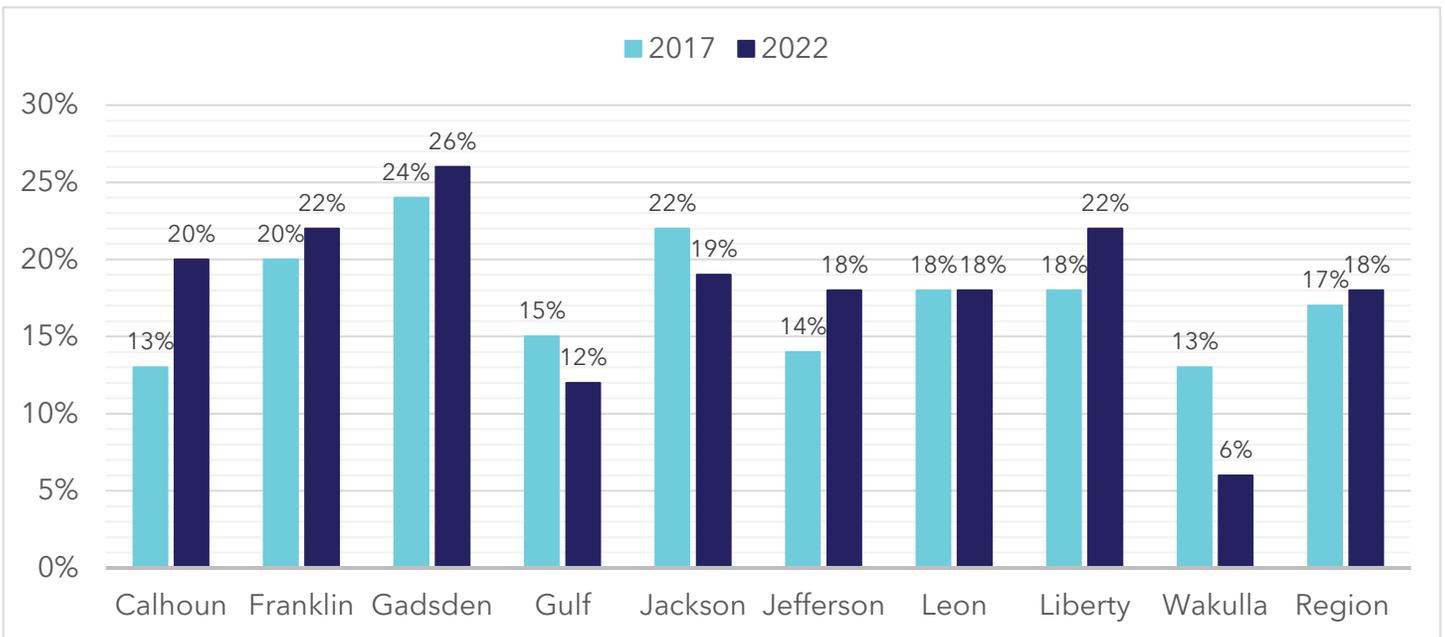
INFRASTRUCTURE INVESTMENT

The growth in transportation and warehousing should be supported by investments in infrastructure, especially road, rail, and broadband improvements. This will enhance the region's ability to serve as a logistics hub for Florida and neighboring states. Also, expanding broadband access is critical for supporting both the information sector and farm sector as farming becomes more technology-driven and businesses increasingly rely on digital infrastructure.

CAPITALIZE ON WAGE GROWTH IN KNOWLEDGE SECTORS

With fast wage growth in professional services and information, the region should invest in talent attraction strategies, including promoting the quality of life, affordable housing, and access to outdoor activities in areas like Wakulla and Franklin, which are appealing to remote workers or professionals seeking a work-life balance. Additionally, providing incentives for businesses in the professional, scientific, and information sectors to expand or relocate to the region can boost local employment opportunities while diversifying the economy.

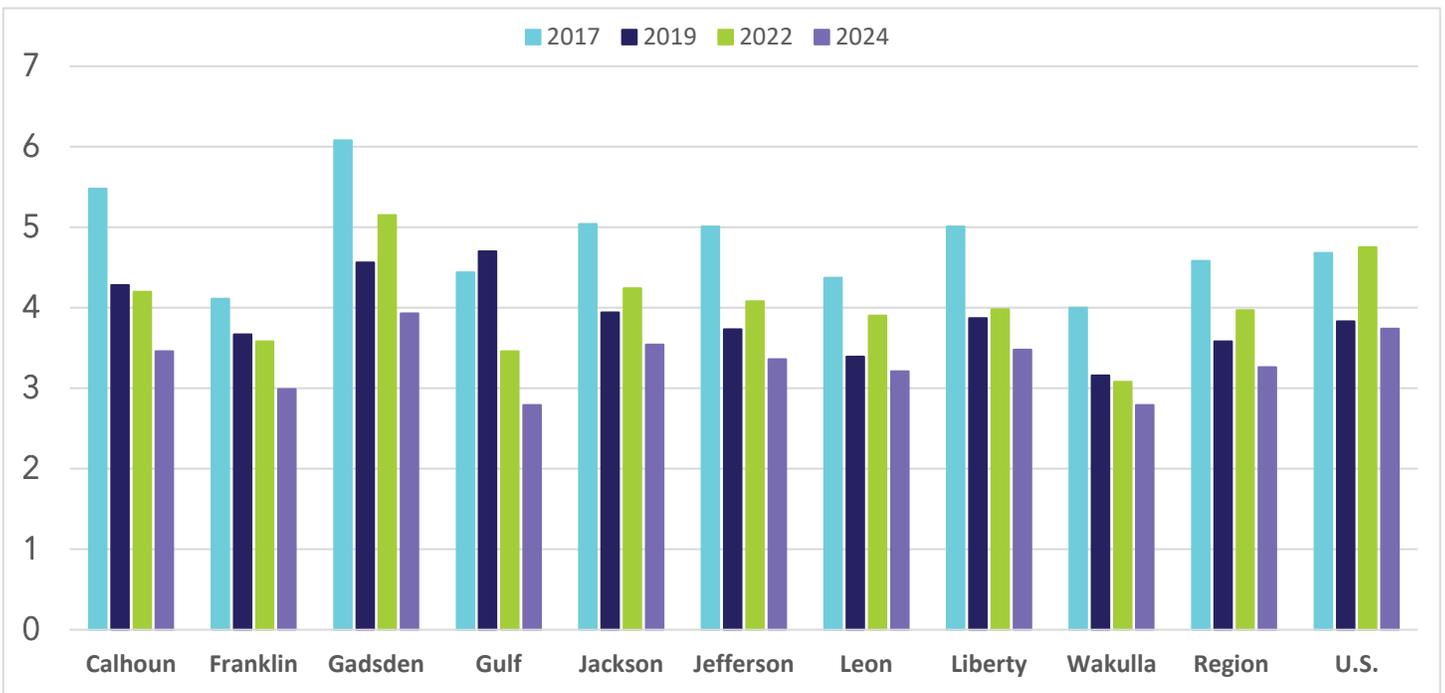
POVERTY RATE BY COUNTY AND REGIONAL AVERAGE (2017, 2022)



Source: American Community Survey 5-Year Estimates

Persistent high poverty rates, especially in Gadsden County, highlight the need for targeted economic interventions. Addressing poverty in these counties will require a focus on education, job creation, and access to services.

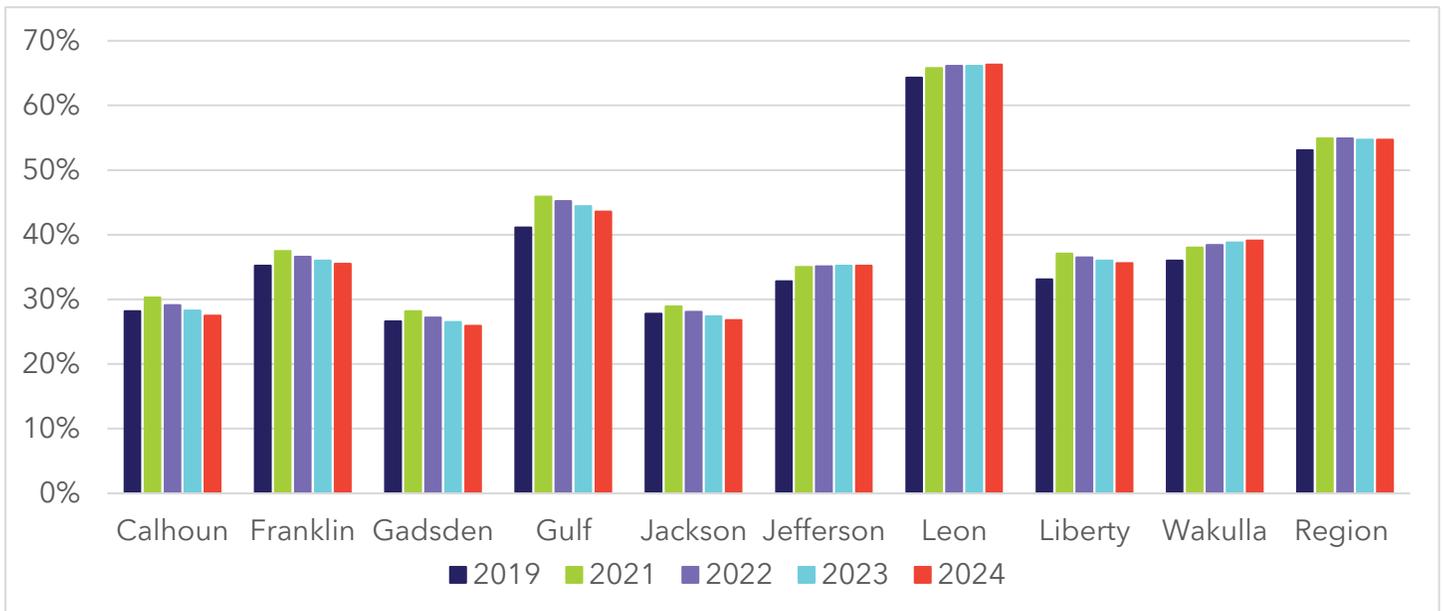
ANNUAL AVERAGE UNEMPLOYMENT RATE (2021-2022)



Source: StatsAmerica - Measuring Distress (<https://www.statsamerica.org/distress/dist.aspx>)

Unemployment rates have fluctuated, with some counties showing persistent issues with joblessness. Developing job training programs and fostering industry growth could mitigate unemployment, particularly in counties with high rates.

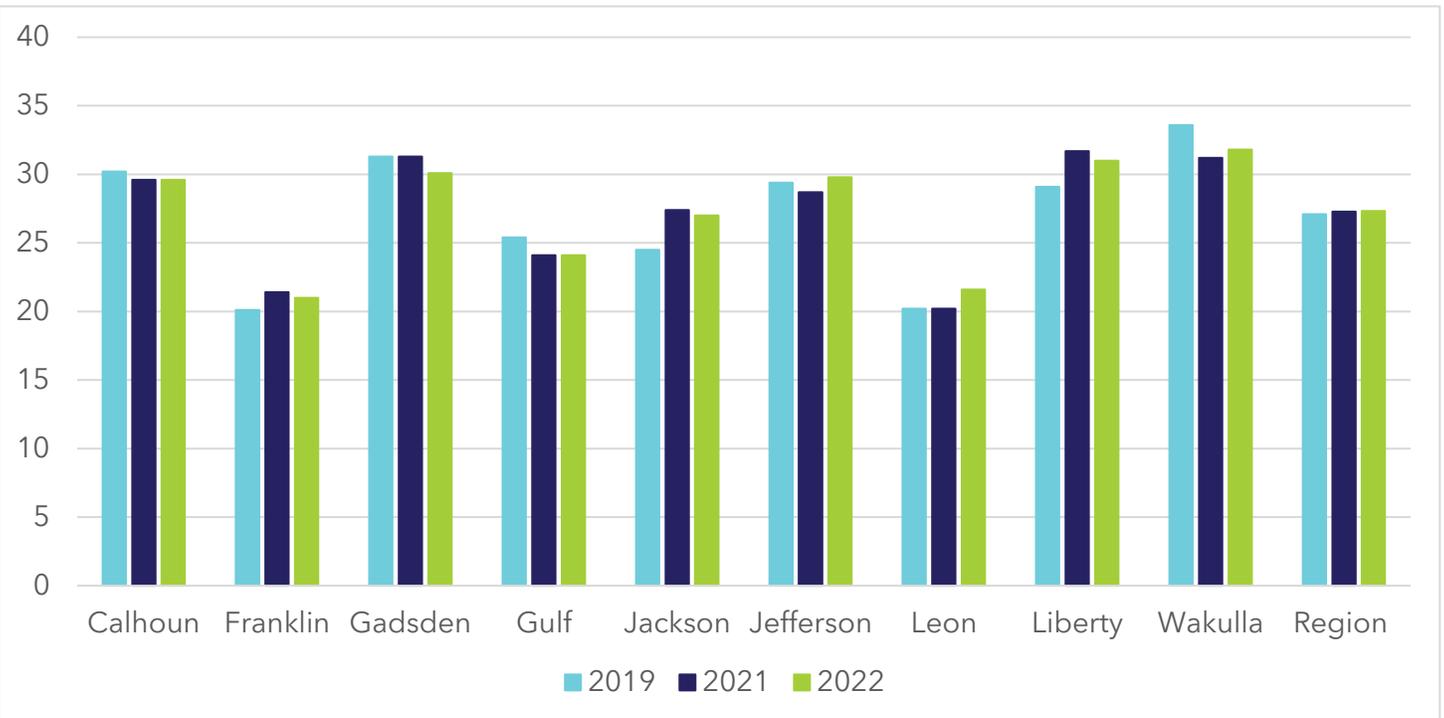
RELATIVE HOUSING PRICE (2019, 2021-2024)



Source: REMI PI+

Housing prices vary significantly, with some counties experiencing increased pressure due to population growth and economic development. Addressing affordable housing will be crucial, especially in counties with sharp increases in housing costs.

AVERAGE TRAVEL TIME TO WORK (2019-2022)



Source: Florida Department of Transportation

Longer commute times in rural areas highlight infrastructure and transportation challenges. Reducing commute times through improved infrastructure or local job creation could enhance quality of life

SCHOOL DISTRICT GRADES (2019, 2022–2024)

	SCHOOL DISTRICT GRADES			
	2024	2023	2022	2019
CALHOUN	A	B	B	B
FRANKLIN	C	C	C	C
GADSDEN	C	C	C	C
GULF	C	B	B	C
JACKSON	B	B	B	B
JEFFERSON	C	C	C	C
LEON	B	B	B	B
LIBERTY	A	A	A	A
WAKULLA	A	B	B	A

Source: Florida Department of Education

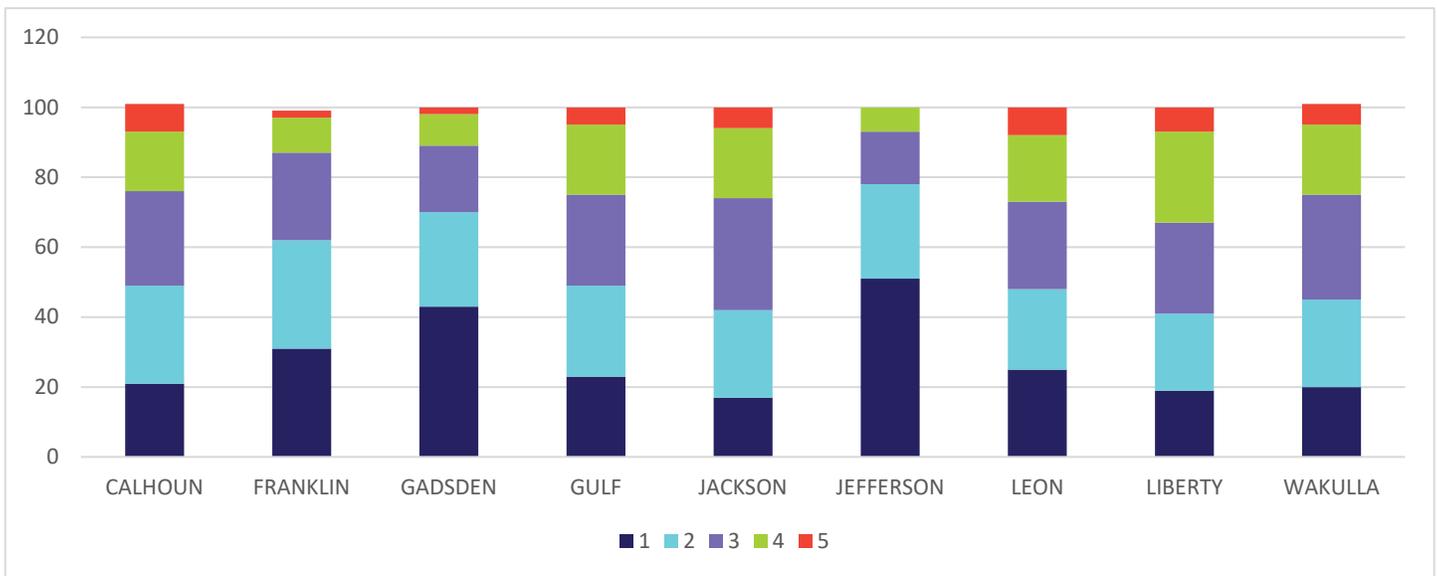
Variability in school district performance may impact workforce development, with lower-performing areas needing education-focused investments. Improving school performance in lower-ranked counties will be vital for long-term economic stability.

Currently, the top-rated school districts in the Apalachee Region are in Calhoun, Liberty, and Wakulla counties, all of which received “A” scores in 2024. As a whole, the Region’s school district grades have been steady or improving since students returned to in-person instruction following closures due to the Covid-19 pandemic.

HIGHER EDUCATION AND VOCATIONAL TRAINING CENTERS

- Chipola College
- Florida A&M University (FAMU)
- Florida State University (FSU)
- Gadsden Technical College
- Gulf Coast State College – Gulf/Franklin Campus
- Keiser University
- Lively Technical College
- Tallahassee State College (TSC)
- TSC Gadsden Center
- TSC Wakulla Center
- Wakulla Environmental Institute (WEI)

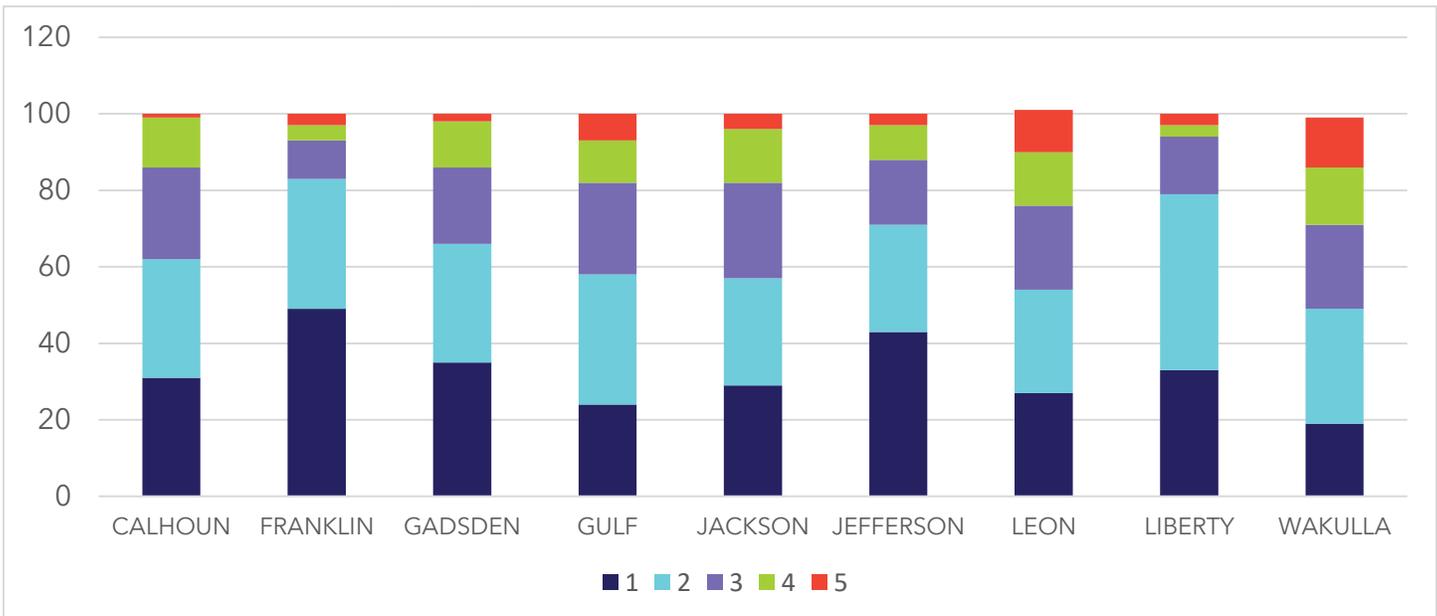
3RD GRADE READING SCORES (2023) – PERCENT OF STUDENTS AT EACH ACHIEVEMENT LEVEL



Source: Florida Department of Education

Generally, third grade is the point at which students stop learning how to read and start reading for comprehension. Therefore, when students fall behind in reading scores by the time they arrive at third grade, the negative outcomes of lower reading levels compound in subsequent schooling years and can be a factor in workforce readiness and later life outcomes. Counties with lower reading proficiency, such as Gadsden, may face long-term workforce development challenges. Early education improvements are necessary to ensure future economic growth and reduce skill gaps.

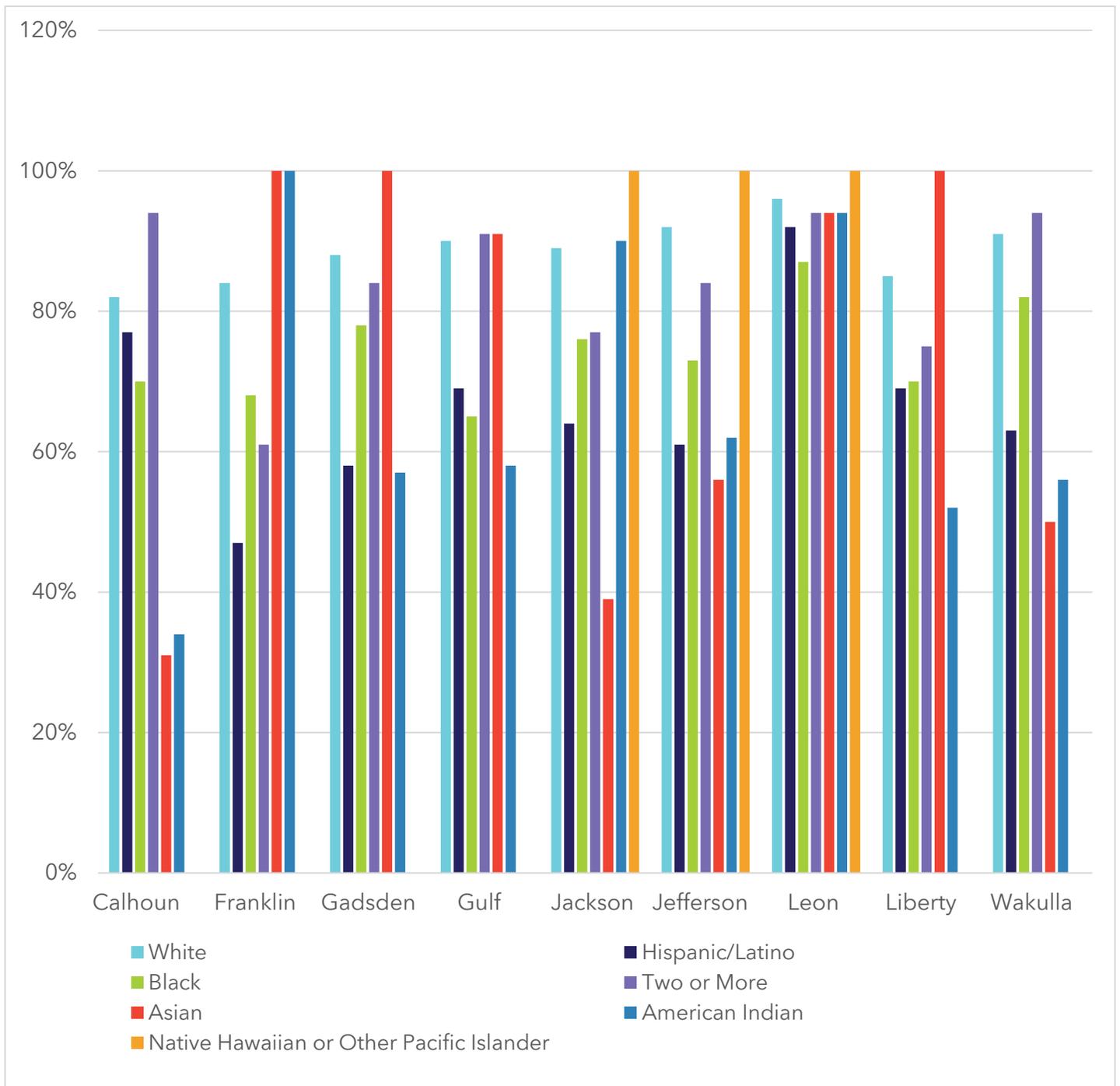
8TH GRADE MATH SCORES (2023) – PERCENT OF STUDENTS AT EACH ACHIEVEMENT LEVEL



Source: Florida Department of Education

Weak math proficiency in several counties could affect future STEM-related job readiness. Investments in middle school education, particularly in math, could have significant long-term economic benefits.

HIGH SCHOOL GRADUATION RATES BY ETHNICITY (2023)



Source: American Community Survey 5-Year Estimates

In 2023, graduation rates for Pacific Islander students were 100 percent across the Region. Graduation rates for White students are at or above 80 percent across the Region. Graduation rates for American Indian (Native American) and Asian students varied drastically across the Region, with rates falling between 30 percent and 100 percent. Graduation rates for Black or African American students fell between 65 percent and 90 percent. Hispanic students performed slightly lower, with graduation rates between 45 percent and 90 percent.

Enhancing educational support systems could help mitigate dropout rates, improve achievement scores, and lead to higher graduation percentages. Overall, improving high school graduation rates is key to having a prepared, workforce-ready population.

BUSINESS AND INDUSTRY

REGIONAL DOMESTIC PRODUCT (2019-2024)

	CALHOUN	FRANKLIN	GADSDEN	GULF	JACKSON	JEFFERSON	LEON	LIBERTY	WAKULLA
2019	\$211 Million	\$409 Million	\$1.144 Billion	\$446 Million	\$1.117 Billion	\$235 Million	\$14.589 Billion	\$166 Million	\$503 Million
2020	\$214 Million	\$415 Million	\$1.162 Billion	\$452 Million	\$1.134 Billion	\$238 Million	\$14.862 Billion	\$168 Million	\$510 Million
2021	\$302 Million	\$368 Million	\$1.377 Billion	\$469 Million	\$1.486 Billion	\$292 Million	\$15.486 Billion	\$169 Million	\$793 Million
2022	\$312 Million	\$381 Million	\$1.421 Billion	\$491 Million	\$1.532 Billion	\$306 Million	\$16.075 Billion	\$182 Million	\$832 Million
2023	\$310 Million	\$389 Million	\$1.258 Billion	\$507 Million	\$1.424 Billion	\$281 Million	\$16.336 Billion	\$237 Million	\$843 Million
2024	\$306 Million	\$387 Million	\$1.243 Billion	\$504 Million	\$1.407 Billion	\$280 Million	\$16.50 Billion	\$236 Million	\$843 Million
PERCENT CHANGE	45%	-5%	9%	13%	26%	19%	13%	42%	68%

Source: REMI PI+

Regional domestic product, also referred to as *gross domestic product (GDP)*, is a measure of the Region’s exports to other U.S. regions or abroad. GDP growth in certain counties suggests successful economic activities, but disparities persist. The most significant percentage gains have occurred in Wakulla, Calhoun and Liberty counties, while Franklin County’s GDP has been in a state of decline. Economic strategies should focus on boosting productivity and business activity in counties with slower GDP growth.

REGIONAL PURCHASE COEFFICIENT (2021-2024)

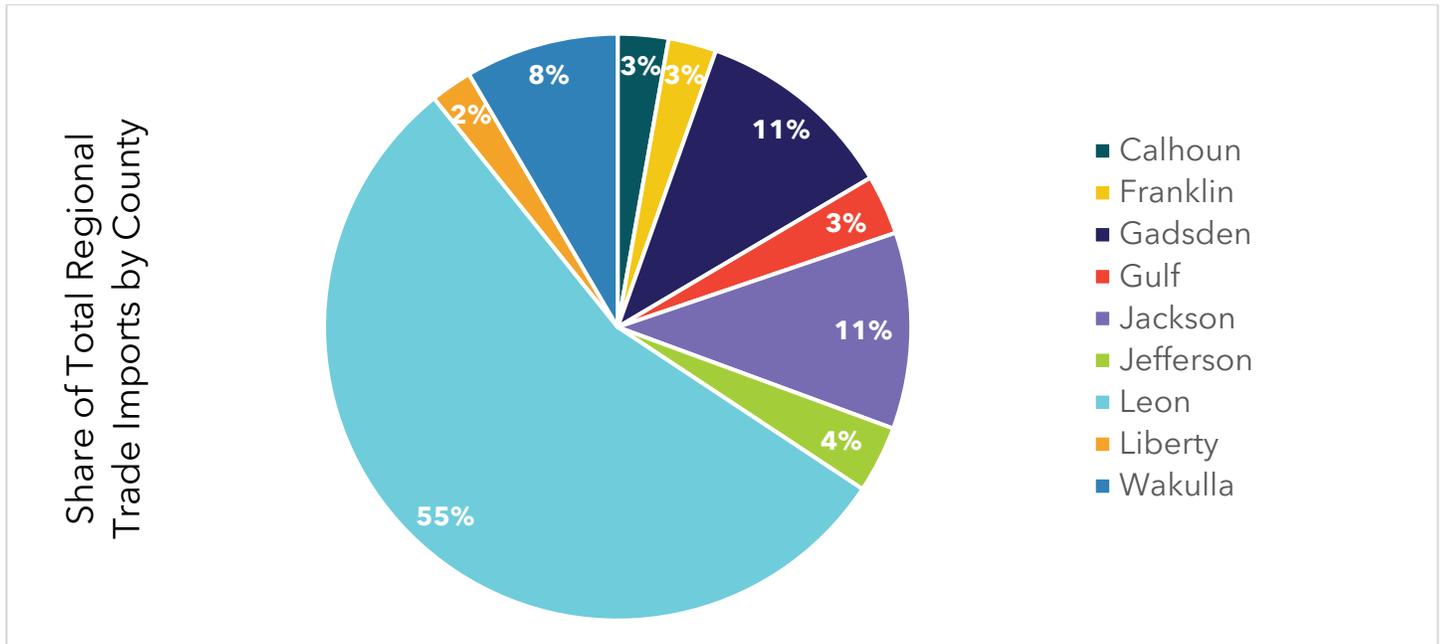
	CALHOUN	FRANKLIN	GADSDEN	GULF	JACKSON	JEFFERSON	LEON	LIBERTY	WAKULLA
2021	0.289	0.378	0.366	0.403	0.394	0.274	0.627	0.197	0.319
2022	0.289	0.378	0.340	0.395	0.382	0.239	0.619	0.202	0.313
2023	0.308	0.373	0.341	0.396	0.383	0.240	0.621	0.206	0.315
2024	0.300	0.374	0.342	0.397	0.385	0.2400	0.623	0.207	0.317

Source: REMI PI+

The regional purchase coefficient is a ratio between 0 and 1, where 0 indicates that a county is entirely reliant on goods from outside that county and 1 indicates that a county is entirely self-sufficient and able to produce all of the goods that it consumes. Counties with higher regional purchase coefficients, like Gulf and Leon counties, generally have a healthier level of economic diversification and activity that can better support local business and community needs.

TRADE IMPORTS (2024)

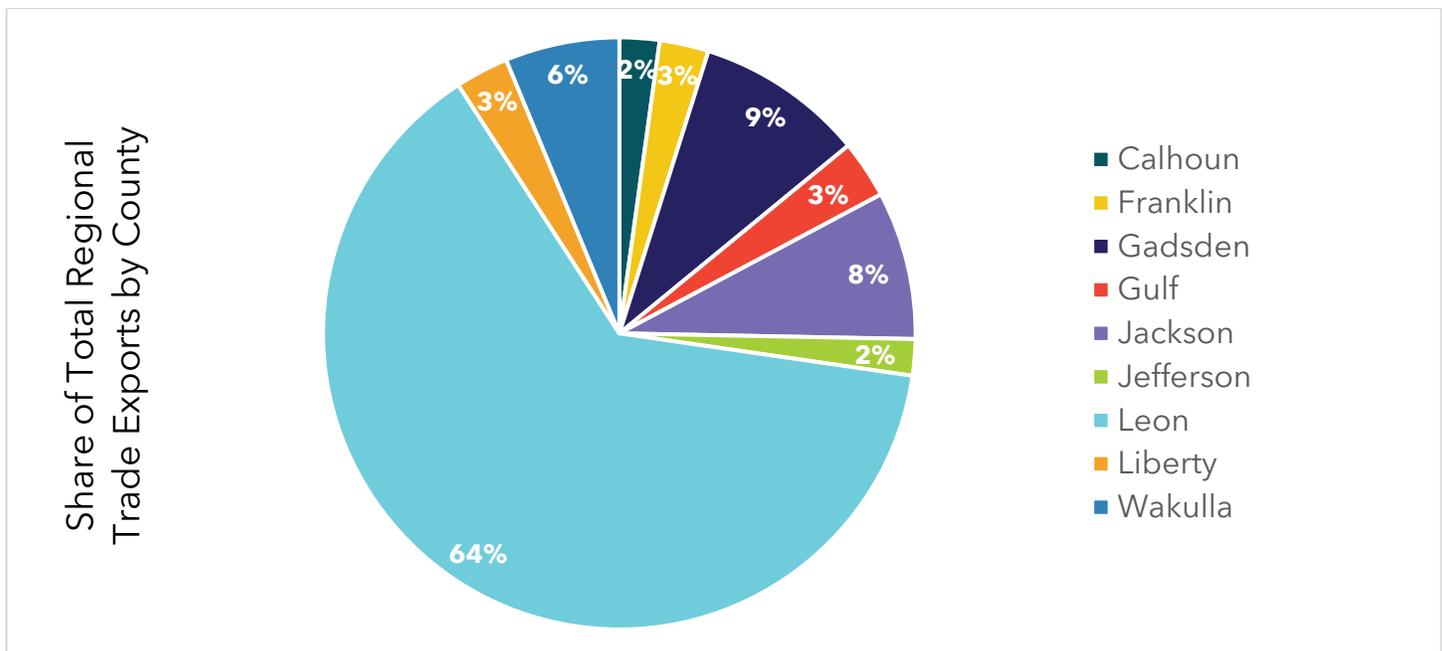
The Apalachee Region's estimated total in trade imports is \$11.079 billion, roughly half of which stems from Leon County (\$5.466 billion) with the next largest amounts of trade imports belonging to Jackson, Gadsden, and Wakulla counties. The chart below shows each county's percentage share of total regional trade imports.



Source: REMI PI+

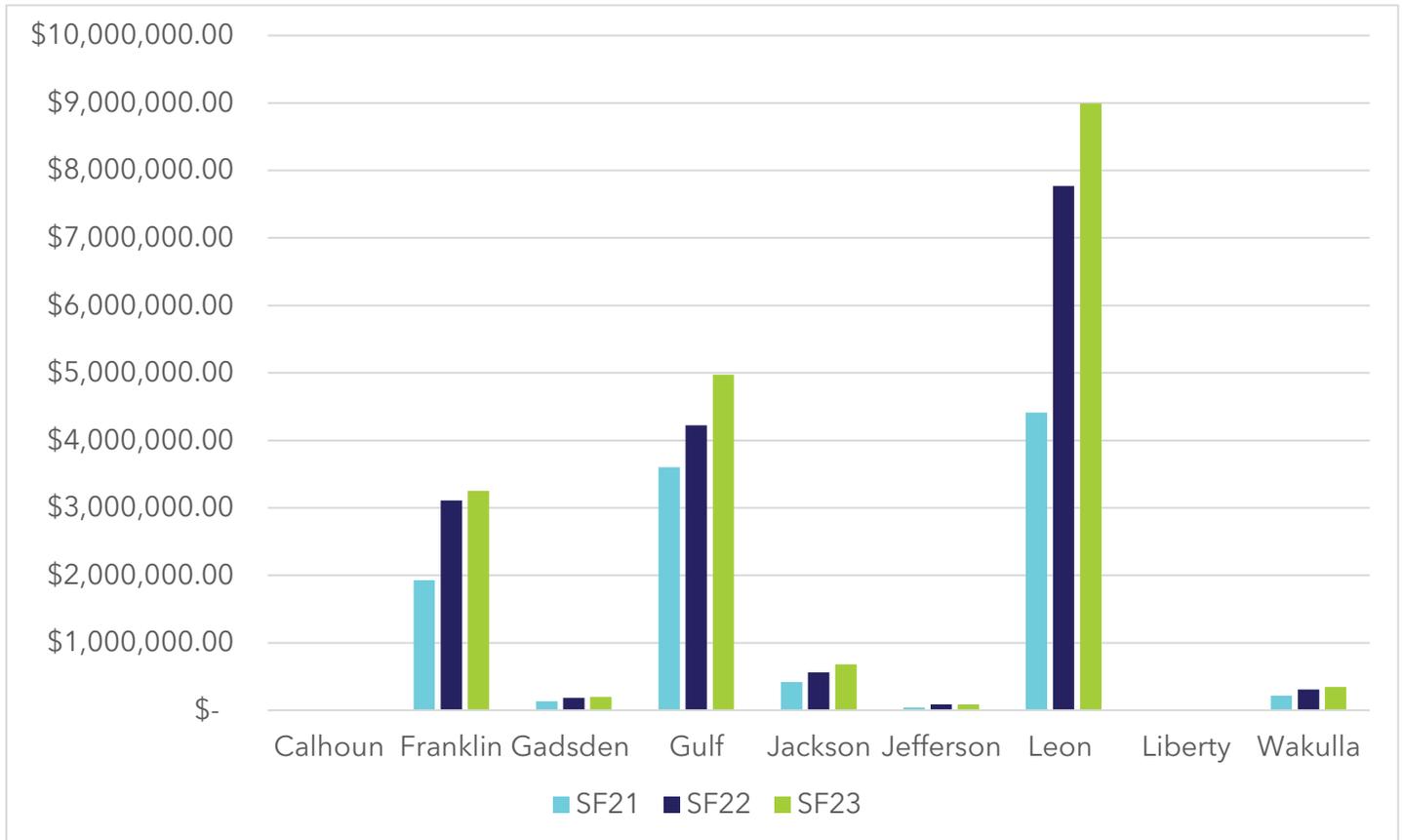
TRADE EXPORTS (2024)

The chart below shows each county's percentage share of total regional trade exports, which amount to an estimated \$4.593 billion. Regional trade exports currently total less than half of total regional trade imports, which may indicate an overreliance on imported goods or that exports are less valuable than imports.



Source: REMI PI+

TOURISM DEVELOPMENT TAX REVENUE (2021-2023)

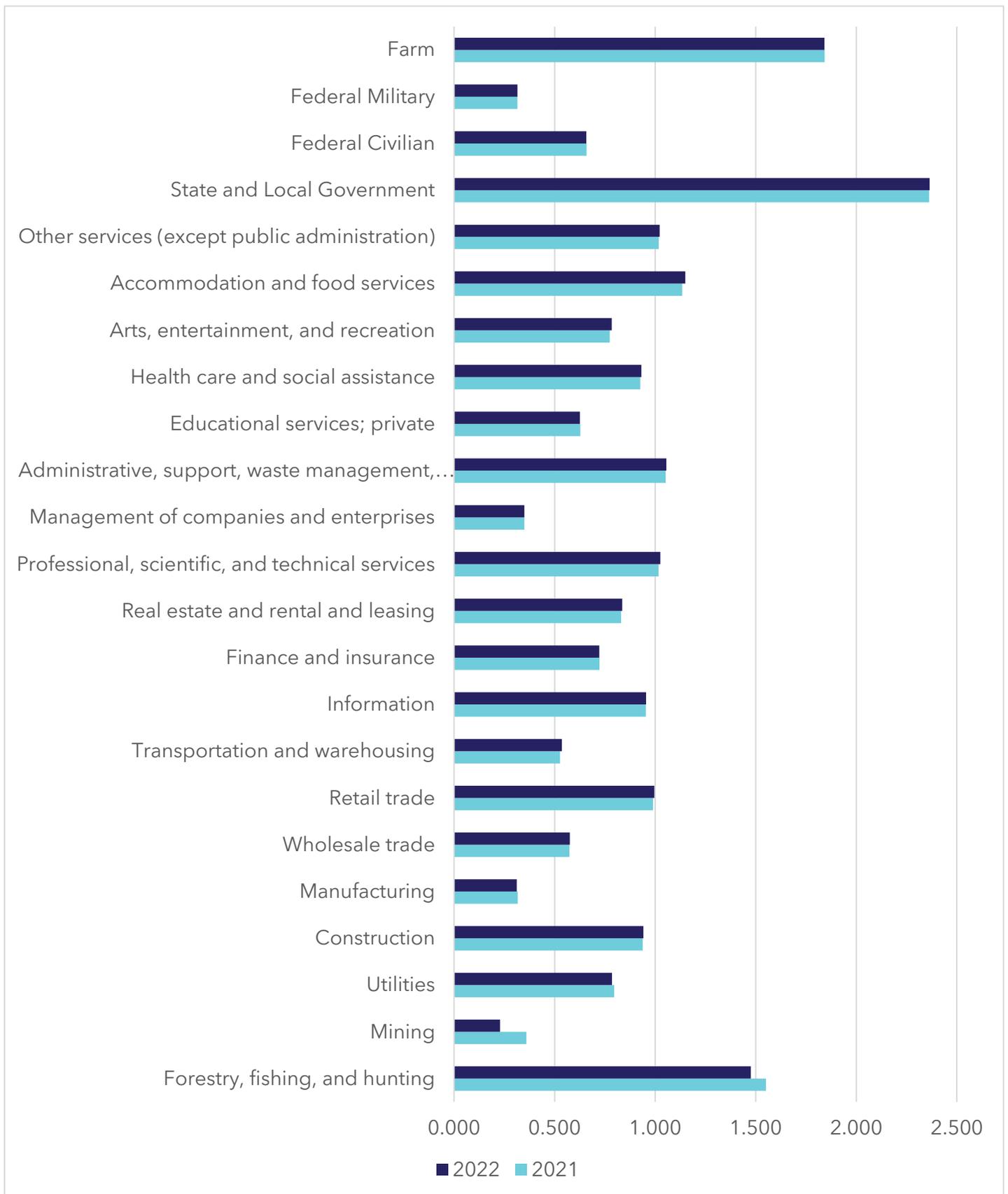


Source: Florida Department of Revenue

The tourism development tax is managed at the county level and is a method of shifting the tax burden from locals to tourists to support infrastructure development or other activities that support the tourism industry as well as year-around quality of life. It can be a useful, passive tool to support economic development. Counties that account for the highest tourism development tax revenue are Franklin, Gulf, and Leon counties.

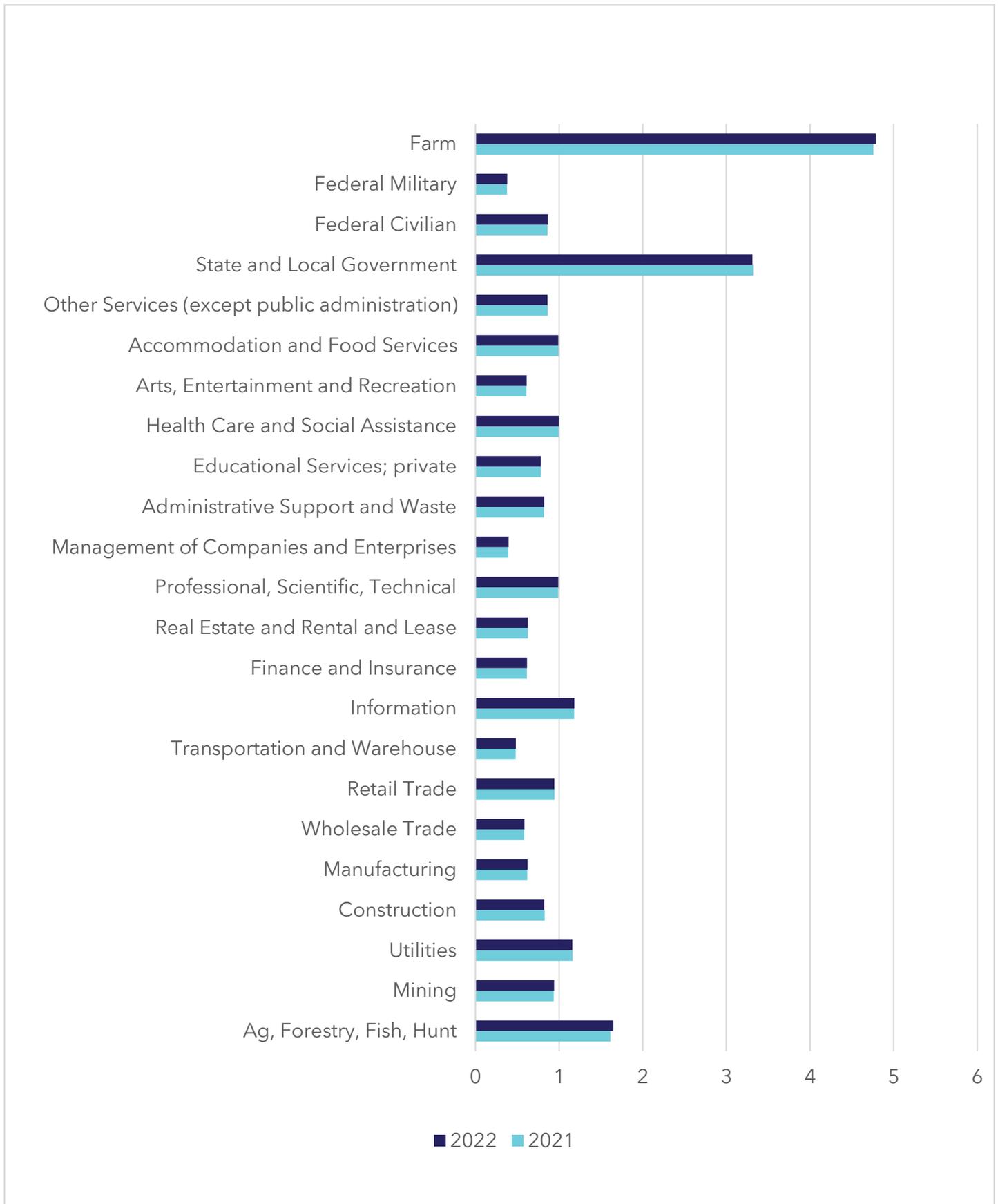


LOCATION QUOTIENT (LQ), APALACHEE REGION (COMPARED TO THE NATION 2021-2022)



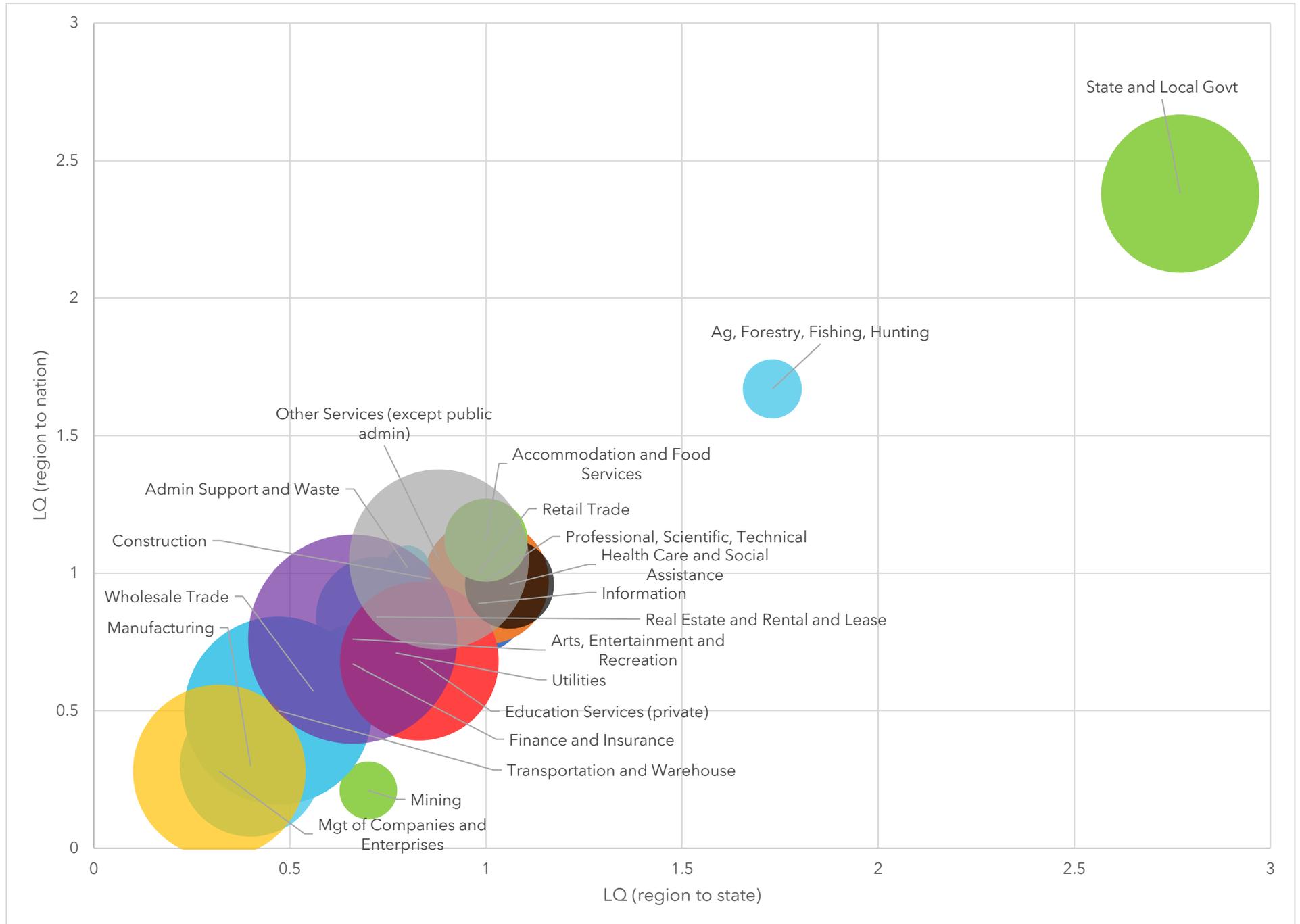
Source: REMI PI+

LOCATION QUOTIENT (LQ), APALACHEE REGION (COMPARED TO FLORIDA 2021-2023)



Source: Bureau of Labor Statistics

APALACHEE INDUSTRY CONCENTRATIONS BY EMPLOYMENT SIZE RELATIVE TO FLORIDA AND U.S. (2022)



SHIFT SHARE ANALYSIS, APALACHEE REGION (2020-2022)

INDUSTRY	2020-2021			2021-2022		
	NATION SHARE	INDUSTRY MIX	REGIONAL SHIFT	NATION SHARE	INDUSTRY MIX	REGIONAL SHIFT
Agriculture, Forestry, Fishing, Hunting	0.072	-0.028	-0.003	0.097	0.145	0.025
Mining	0.009	-0.017	0.005	0.012	0.006	0.003
Utilities	0.019	-0.021	0.009	0.025	-0.003	-0.004
Construction	0.482	-0.569	0.446	0.648	-0.342	-0.039
Manufacturing	0.179	0.031	0.038	0.245	0.256	-0.072
Wholesale Trade	0.161	0.108	0.103	0.227	-0.153	-0.044
Retail Trade	0.813	0.987	0.869	1.183	-1.559	-0.133
Transportation and Warehouse	0.205	0.165	0.227	0.294	0.045	-0.046
Information	0.136	0.015	-0.037	0.184	-0.016	-0.073
Finance and Insurance	0.329	-0.239	0.027	0.436	-0.087	0.004
Real Estate and Rental and Lease	0.343	-0.221	0.205	0.464	0.039	-0.017
Professional, Scientific, Technical	0.643	0.057	0.286	0.886	0.143	-0.085
Management of Companies and Enterprises	0.035	0.013	0.002	0.048	0.002	-0.002
Administrative Support and Waste	0.554	-0.059	0.171	0.756	0.066	-0.083
Educational Services (private)	0.144	-0.121	0.076	0.193	0.091	0.011
Health Care and Social Assistance	0.982	-0.725	0.694	1.330	0.227	-0.172
Arts, Entertainment and Recreation	0.124	0.202	0.118	0.182	0.314	-0.042
Accommodation and Food Services	0.627	1.993	0.412	0.953	0.125	0.002
Other Services (except public administration)	0.501	-0.437	0.544	0.684	0.680	0.114
State and Local Government	2.124	-1.956	0.731	2.827	-1.124	0.181

Source: REMI PI+

National Share (NS) = $i_{local}(t-1) * US(t) / US(t-1)$

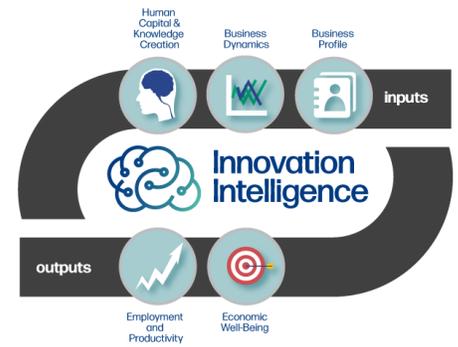
Industry Mix (IM) = $(i_{local}(t-1) * (i_{US}(t) / i_{US}(t-1))) - NS$

Regional Shift (RS) = $i_{local}(t-1) * ((i_{local}(t) / i_{local}(t-1)) - (i_{US}(t) / i_{US}(t-1)))$

QUALITY OF LIFE

INNOVATION INDEX RANKING (2023)

StatsAmerica's "Innovation Intelligence" Innovation Index is a way to broadly judge the health and potential of a local economy. Essentially, each county's ranking is determined by existing economic inputs and outputs that are then combined into a singular, at-a-glance number. Currently, the highest scores are boasted by Leon and Wakulla counties.



County	Score	Median	Rank of 3110
Calhoun	100.5	108	2338
Franklin	114.1	108	1,035
Gadsden	98.1	108	2528
Gulf	117.7	108	799
Jackson	103.8	108	2024
Jefferson	106	108	1788
Leon	122.5	108	561
Liberty	94.6	108	2772
Wakulla	127.8	108	345
Apalachee Region	117.8		

Source: StatsAmerica

ECONOMIC WELL-BEING INDEX RANKING (2023)

The Economic Well-Being Index is a subset of the Innovation Index, which focuses on aspects of a local economy that are tied to quality of life and sustainability. The best scores in the Apalachee Region currently belong to Wakulla County and Gulf County.

County	Score	Median	Rank of 3110
Calhoun	115.9	118	2,092
Franklin	123	118	1698
Gadsden	109.1	118	2493
Gulf	140.6	118	733
Jackson	112	118	2314
Jefferson	128.3	118	1394
Leon	137	118	905
Liberty	113.3	118	2236
Wakulla	152.3	118	228
Apalachee Region	124.8		

Source: StatsAmerica

INCOME INEQUALITY (2015)

According to the Economic Policy Institute, the State of Florida has the second highest level of income inequality in the U.S. Several Apalachee counties have notably high levels of income inequality, including Franklin County that ranks with the 16th highest level of income inequality of all U.S. counties. Gulf and Leon counties also have relatively high levels of income inequality.

Apalachee counties with the lowest levels of income inequality—compared to both Florida and U.S.—are Liberty and Wakulla counties. While this data indicator can be useful, it is easier to skew the data in a rural county with a smaller population, since just one high-earning household can cause a major shift in the ratio.

Ratio of Top 1% Income to Bottom 99% Income (2015)

County	Average Income of Top 1%	Average Income of Bottom 99%	Top-to-Bottom Ratio	National Rank by Top-to-Bottom Ratio (of 3061)
Calhoun	\$325,175	\$23,317	13.9	1278
Franklin	\$1,456,120	\$26,956	54	16
Gadsden	\$358,755	\$24,576	14.6	1134
Gulf	\$700,023	\$27,856	25.1	175
Jackson	\$347,856	\$25,866	13.4	1428
Jefferson	\$520,111	\$28,013	18.6	536
Leon	\$773,030	\$34,376	22.5	250
Liberty	\$267,497	\$25,445	10.5	2387
Wakulla	\$343,815	\$33,973	10.1	2514

Source: Economic Policy Institute



Image: Pedestrian bridge at the J.R. Alford Greenway in Leon County

SWOT ANALYSIS

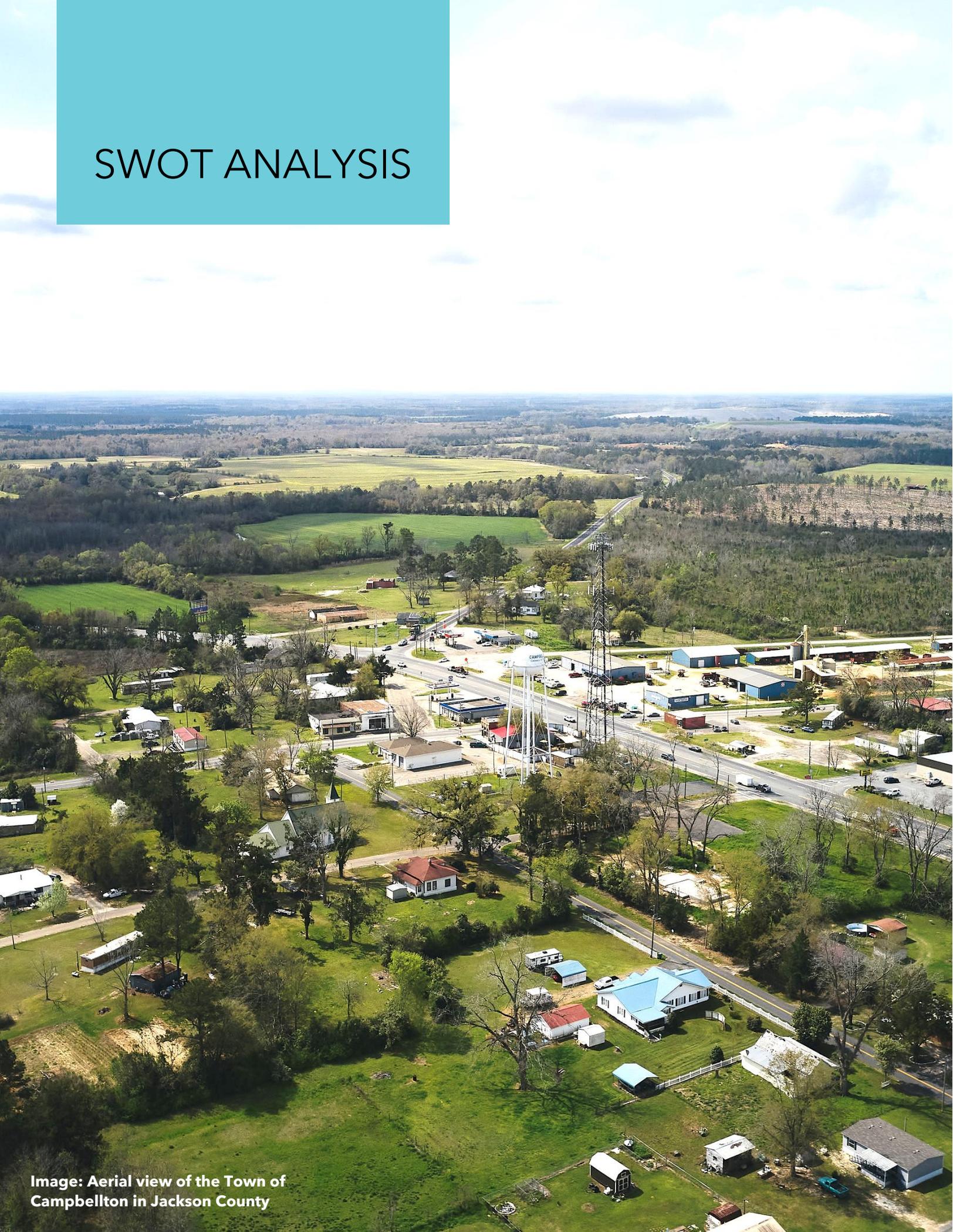


Image: Aerial view of the Town of Campbellton in Jackson County

SWOT ANALYSIS

The mapping of strengths, weaknesses, opportunities, and threats (SWOT) is a tried-and-true technique for assessing the capacity and greater context of an economy. SWOT is defined as:

- **STRENGTH** or **WEAKNESS** is *internal* to the Apalachee Region and can be an asset, limitation, or information about a characteristic of the region.
- **OPPORTUNITY** or **THREAT** is *external* to the Apalachee Region, understood as a trend, law, or other large phenomenon, which can affect the future performance of regional assets and characteristics.

STRENGTHS

Collaboration

- Growing commitment to strong regional collaboration and project partnerships across governments, economic/ community development organizations, education centers, and non-profits.

Education and Workforce

- High quality degree-seeking and vocational training institutions
- Low unemployment rate

Business and Industry

- Emerging ecosystem of entrepreneurial programs, assets, and networks
- New and growing industry sectors
- Rural sites available for development

Infrastructure

- Access to Interstate-10, deep water seaport, railroads, and airports
- Water resources

Quality of Life

- Coastline and Gulf of Mexico
- Rivers, springs, lakes, etc.
- State and national parks
- Growing system of paved, non-motorized trails and bike/pedestrian infrastructure

WEAKNESSES

Collaboration

- Gaps in engaged stakeholder groups, especially in rural counties, with space to increase level of engagement for current and future collaborators

Education and Workforce

- Socio-economic disparities
- High poverty rates
- Low high school graduation rates in certain areas
- Declining rural population and labor force

Business and Industry

- Site readiness, especially in rural areas
- Disconnect between businesses and capital
- Lack of vibrant industry clusters with supply chain alignment
- Difficult to attract/retain skilled talent
- Regional wages not competitive with U.S.

Infrastructure

- Half of Region not covered by a regional transportation planning organization
- Improvements needed to rail, deep water port, and airports
- Large amount of unpaved roads
- Limited/antiquated wastewater infrastructure

Quality of Life

- Lack of affordable/workforce housing
- Limited amenities to attract young professionals
- Generational poverty

OPPORTUNITIES

Collaboration

- Partnerships with other regions and states to improve the strength and connectivity of the regional economy
- Expanded entrepreneurship network
- Information sharing
- Strengthen “cradle to career” education pathway
- Collaborative, cross-platform regional marketing and awareness campaigns

Business and Industry

- Expansion of shared Business, Retention, and Expansion (BRE) activities
- Investments in public infrastructure

Funding

- Federal and state funding/grants
- Triumph Gulf Coast grant funding for coastal counties (from BP Deepwater Horizon oil spill settlement)
- Leverage public and private investment

Disasters

- Disaster resiliency, preparedness, response, and recovery initiatives

THREATS

Collaboration

- Loss of collaborative partners

Business and Industry

- Inflation
- Major shifts in industry

Social and Political Environment

- Decline in population
- Political instability
- Decision-making
- Regulations and legislation

Funding

- Reduced statewide and federal grants or incentives for economic development
- Legislative reallocation of economic development dollars away from Region

Disasters

- Hurricanes and other storms
- Flooding and sea-level rise
- Public health emergencies
- Environmental degradation
- Economic downturn or recession

ACTION PLAN: GOALS AND OBJECTIVES

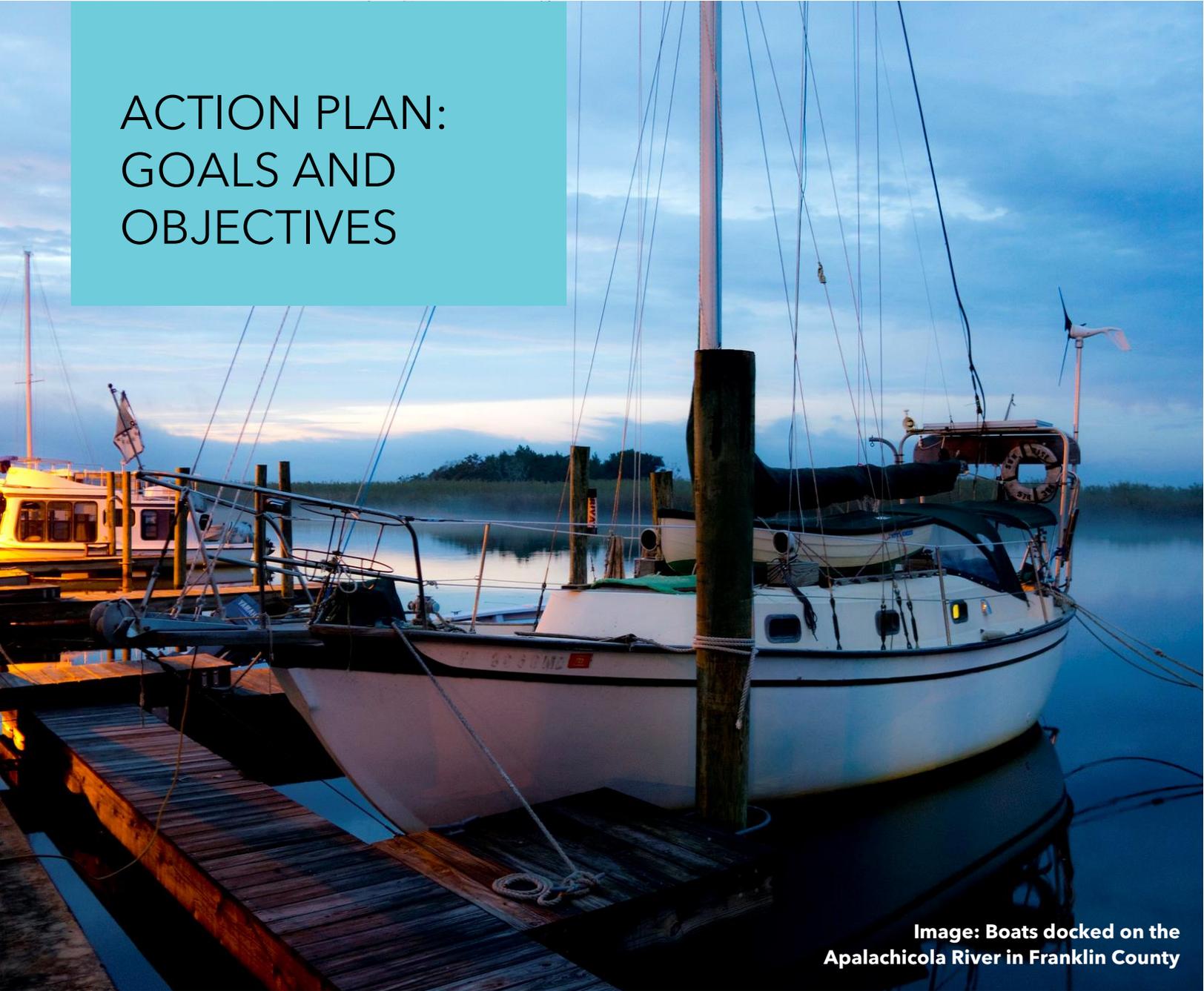


Image: Boats docked on the Apalachicola River in Franklin County

The Action Plan translates regional priorities into well-defined goals and objectives to guide economic development activities throughout the Apalachee Region. The goals and objectives contained within this Action Plan are influenced by previous Regional Economic Development Strategies, stakeholder meetings, and public comment.

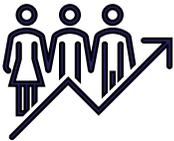
VISION

The Apalachee Region seeks to enhance partnerships, catalyze existing assets, and explore innovative opportunities for growth in order to shape a resilient, vibrant economy that bridges rural and urban systems and respects the needs of the Region's diverse communities to achieve a more equitable, robust regional economy.

GOALS



Goal 1:
Transformative Regional Collaboration



Goal 2:
Economic Diversity, Equity, and Growth



Goal 3:
Dynamic Workforce



Goal 4:
Resilient Infrastructure



Goal 5:
Affordable Housing



Goal 6:
Enhanced Quality of Life

OBJECTIVES

Goal 1. Transformative Regional Collaboration

- Objective 1.1.** Increase employee and business resilience through research, partnerships, workshops, other technical assistance, and innovative projects.
- Objective 1.2.** Develop regional entrepreneurial hubs and connect them with industry clusters, assets, services, networks, facilities, tools, funding, and expertise.
- Objective 1.3.** Work to create a strong pipeline between universities, colleges, other educational assets, Innovation Park, Domi Station, and other stakeholders to harness opportunities to commercialize technology, assist entrepreneurs, assist with business expansion, attract new businesses to the area, and share information.
- Objective 1.4.** Create a regional transportation planning organization that can advocate for the diverse transportation needs of underrepresented counties and undertake planning and implementation activities.
- Objective 1.5.** Continue alignment between Economic Development Elements, Disaster Recovery Plans, Community Redevelopment Area Plans, Economic Development Strategic Plans, Workforce Development Plans, and other plans.
- Objective 1.6.** Collaborate across regional organizations to develop Triumph Gulf Coast, Florida Commerce Job Growth Grant Fund, Florida Commerce Rural Infrastructure Fund, and other project applications that can be leveraged with EDA funding to support resilient rural economies.
- Objective 1.7.** Promote the Apalachee Region as a multi-faceted tourism destination through research, partnerships, workshops, other technical assistance, and innovative projects.
- Objective 1.8.** Support and enhance Primary Education/Post-Secondary Adult Vocational/College/University-to-employer/economic development organization/chamber/other entity connections and project development in the areas of workforce, entrepreneurship, business recruitment, and business expansion.

Goal 2. Economic Diversity, Equity, and Growth

- Objective 2.1.** Explore economic resilience planning and implementation that renders local and regional economies more fit to recover from macro-economic downturns and natural disasters.

- Objective 2.2.** Support the development, retention, and expansion of Minority- and Women-Owned Small Business Enterprises (MWSBEs).
- Objective 2.3.** Connect revolving loan funds, micro-lending programs, angel investors, and other financing opportunities with entrepreneurs and existing businesses to support economic growth.
- Objective 2.4.** Strengthen the regional economy through targeted recruitment of new businesses and supporting existing business expansions under a Business Retention and Expansion (BRE) framework.
- Objective 2.5.** Support the growth of the region's key industry clusters as well as industry diversification to ensure a sustainable business climate.
- Objective 2.6.** Explore opportunities to grow advanced manufacturing, agricultural technology, and logistics industry clusters as well as new frontiers in crop diversification, value-added agriculture, industrial hemp, other innovative crops, and eco-tourism.

Goal 3. Dynamic Workforce

- Objective 3.1.** Support and promote alignment with the CareerSource Boards in the Apalachee Region.
- Objective 3.2.** Bolster collaborative workforce alignment and development initiatives that leverage existing assets, respond to local demand, and lead to the attraction, development, and retention of top talent to meet the workforce needs of employers in the Apalachee Region.
- Objective 3.3.** Connect job seekers and employers in a manner that allows both to improve their current economic status while also improving their long-term economic position by working across economic development and education partners.
- Objective 3.4.** Support aviation, logistics, and other transportation-related education and training initiatives to address state and national workforce gaps.
- Objective 3.5.** Increase employability skills training programs to reduce employment barriers for all students and adults, with a particular focus on underserved, minority, and at-risk populations, in order to close regional workforce skills gaps and improve life outcomes.
- Objective 3.6.** Increase income generating, work-based learning, career exploration, and talent acquisition opportunities for youth through externships, work-study, apprenticeships, internships, and other innovative programs to prepare youth for becoming successful workers, entrepreneurs, and leaders.
- Objective 3.7.** Increase and retain the number of students and professionals in high-demand fields, including science, technology, engineering, mathematics (STEM), health, aviation, transportation, and others to meet demand.
- Objective 3.8.** Encourage improved labor force participation rates by increasing childcare and public transportation options.

Goal 4. Resilient Infrastructure

- Objective 4.1.** Develop connectivity and resiliency in Northwest Florida’s economic infrastructure.
- Objective 4.2.** Develop local, regional, state, and federal partnerships to meet broadband Internet goals and coordinate with partners to meet the needs of unserved and underserved areas.
- Objective 4.3.** Work towards paving the existing, extensive network of dirt roads to enhance regional transportation, logistics, and business development.
- Objective 4.4.** Transition towards regional storm water mitigation ponds instead of individual site ponds to enhance regional resilience and to reduce vulnerability to flooding and other disasters.
- Objective 4.5.** Support the development of infrastructure and utilities (including broadband) at the Port of Port St. Joe, Intermodal Logistics Center in Gadsden County, Tallahassee International Airport, regional/local airports, and associated Freight and Logistics Zone and I-10 Logistics and Manufacturing Corridor projects to incentivize private investment and job creation.
- Objective 4.6.** Support the development of Interstate-10 interchanges, Apalachee airports, Port of Port St. Joe, railroads, and other strategic sites through planning, infrastructure, interlocal agreements, marketing, and other technical assistance in order to accommodate business recruitment and expansion.
- Objective 4.7.** Ensure the future supply of water, cutting-edge telecommunications, and effective energy sources to meet Florida’s economic and quality of life goals.
- Objective 4.8.** Promote site readiness programs for industrial and commercial buildings in rural areas.

Goal 5. Affordable Housing

- Objective 5.1.** Support urban and rural workforce housing initiatives.
- Objective 5.2.** Support the Big Bend Continuum of Care, Community Actions Agencies, and other relevant organizations to address the needs of unhoused and housing-insecure populations through collaborative planning and projects.
- Objective 5.3.** Encourage community planning that enhances residential and commercial resiliency to flooding, hurricanes, and other disasters and promotes the long-term economic viability of disaster-prone areas.
- Objective 5.4.** Undertake collaborative activities that advance diversity, equity, and inclusion across communities in the Apalachee Region.

Objective 5.5. Increase availability of and access to workforce certifications, internships, and apprenticeships for building trades, from the high school to technical school levels, to support the workforce pipeline needed to build and maintain affordable and workforce housing.

Goal 6. Enhanced Quality of Life

Objective 6.1. Support activities that serve to make Northwest Florida a place appealing to existing residents and visitors as well as to a new generation of talented and creative individuals and companies, including improvements to amenities, redevelopment of blighted areas, the local food movement, and other local or national trends.

Objective 6.2. Attract retail businesses, amenities, medical facilities, and other developments to rural areas to retain and support growing families as well as aging-in-place for the 65+ population.

Objective 6.3. Ensure the promotion, protection, and preservation of the Region's natural resources, environment, and historic sites.

Objective 6.4. Enhance comprehensive planning, zoning, and other growth management-based economic development via research, partnerships, and innovative projects to promote smart growth, vibrant downtowns, and multi-modal, mixed-use districts.

EVALUATION METRICS

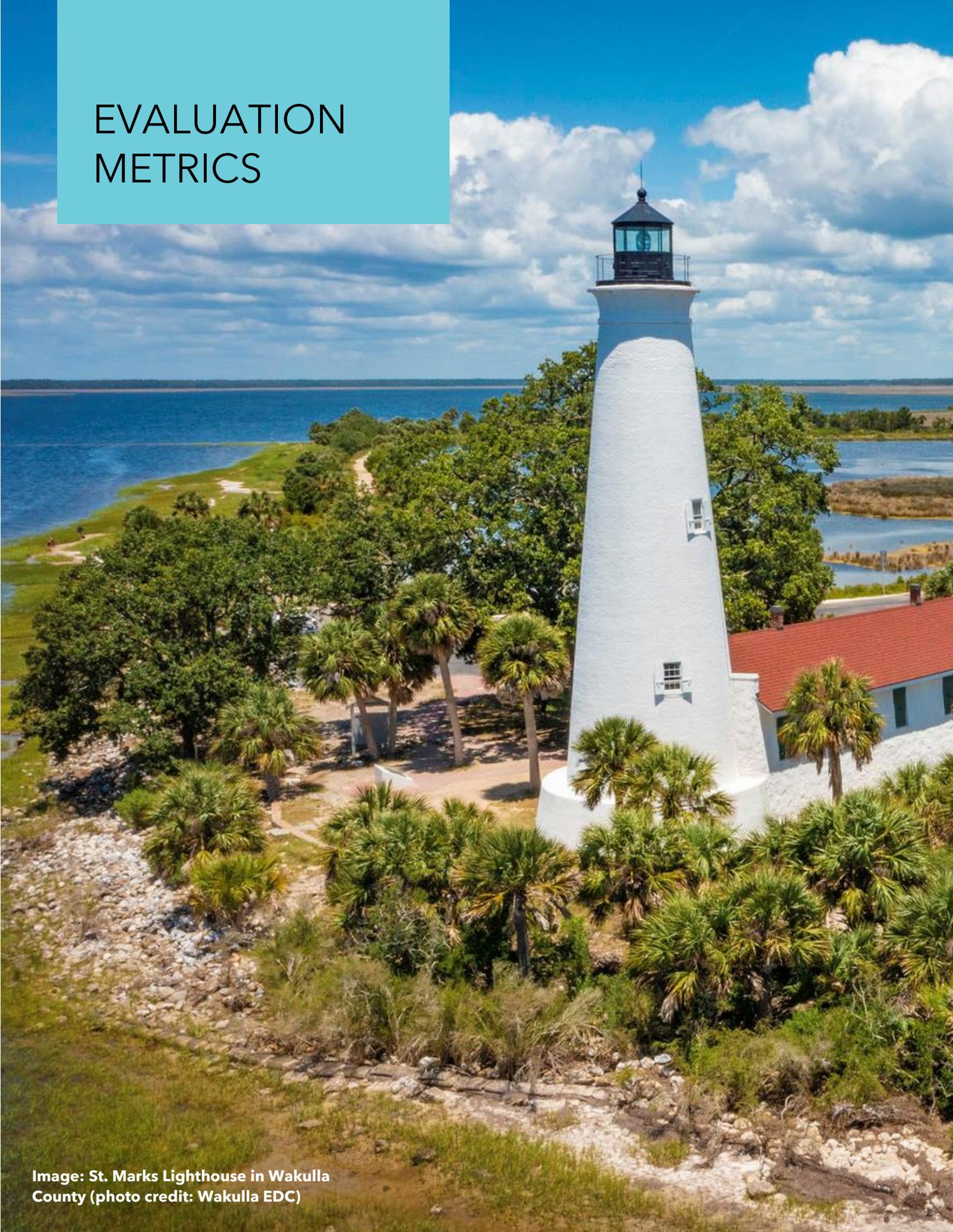


Image: St. Marks Lighthouse in Wakulla County (photo credit: Wakulla EDC)

Evaluation Metrics

This section provides information about metrics tracked to gauge the success of the work in this Strategy. Metrics reflect the level of regional economic health through each of the goal areas. Each of these will be measured over time and across different geographies to understand changes.



Transformative Regional Collaboration

- Number of partners on ARPC listserv of regional stakeholders.
- Number of ARPC Economic Development Committee meetings.
- Increase in funding for collaborative economic development activities.
- Number of networking events and number of attendees.
- Increase in communication between organizations, businesses, counties, and states.
- Increase in representation by underrepresented populations in regional organizations.



Economic Diversity, Equity, and Growth

- Increase in per capita income.
- Net increase in average annual wage.
- Change in employment size for each industry sector.
- Change in number of firms in each industry sector.
- Increase in number of entrepreneurs/business owners receiving business counseling services.
- Volume of small business lending through ARPC Revolving Loan Fund.



Dynamic Workforce

- Increase in percent of students achieving high (level 3 or higher) third grade reading scores.
- Increase in percent of students achieving high (level 3 or higher) eighth grade math scores.
- Increase in high school graduation rate.
- Increase in the number of vocational trainings or career-based programs.
- Change in the labor force participation rate.
- Reduction in the unemployment rate.



Resilient Infrastructure

- Increase in investments in public or public-private infrastructure projects, including transportation, sewer/wastewater, broadband, and green infrastructure projects.
- Estimated economic impact of infrastructure investments.
- Traffic counts for major transportation corridors.
- Change in daily vehicle miles travelled.

- Increase in population with access to high-speed internet.



Affordable Housing

- Change in relative housing price.
- Increase in funding for Statewide Housing Initiatives Partnership (SHIP) Program, Hurricane Housing Recovery Program (HHRP), or other housing programs.
- Number of local ordinances that have been updated in support of attainable, affordable, and/or workforce housing.



Enhanced Quality of Life

- Change in income inequality ratios.

ACKNOWLEDGEMENTS

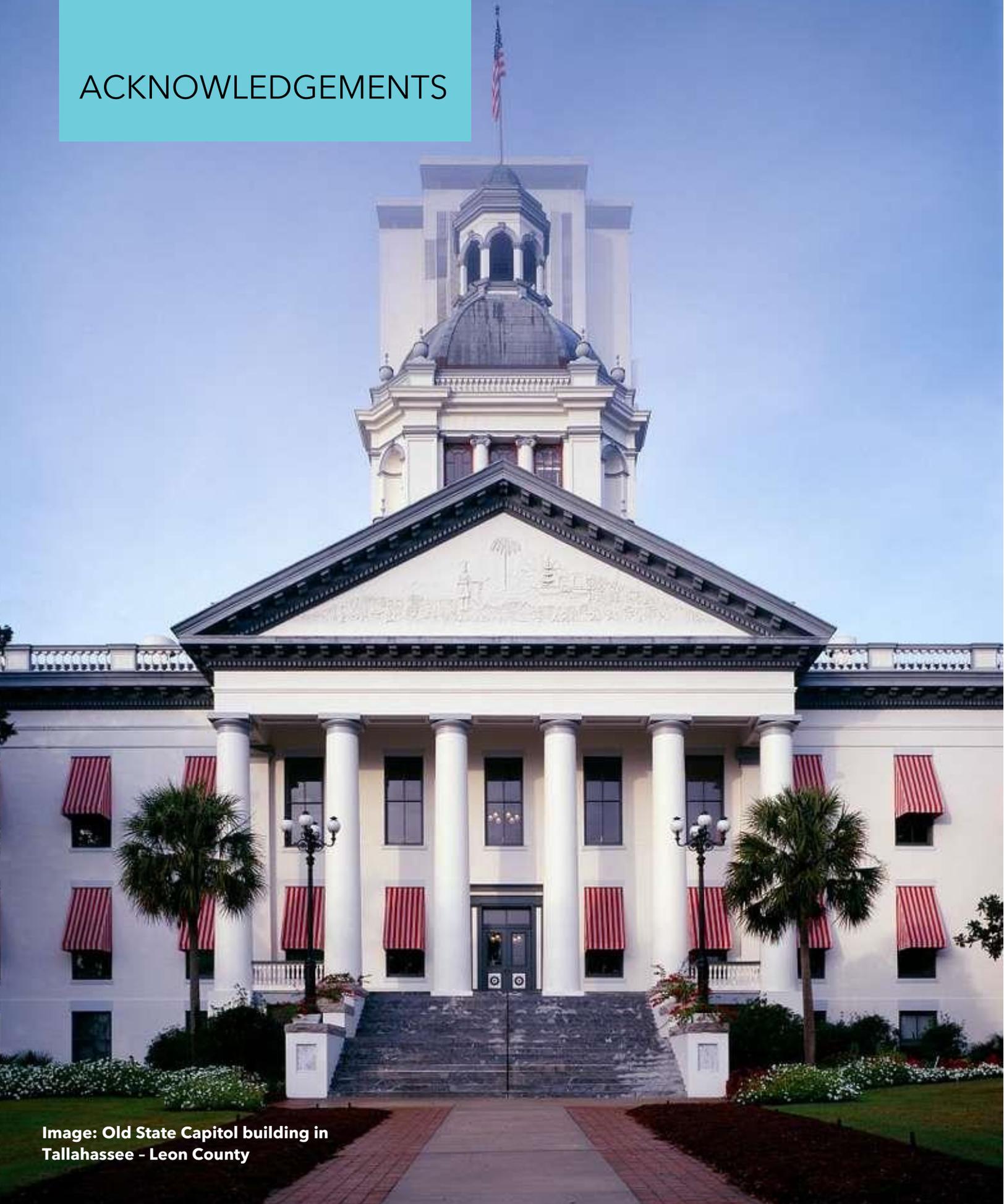


Image: Old State Capitol building in Tallahassee - Leon County

ACKNOWLEDGEMENTS

Apalachee Regional Planning Council (ARPC) staff would like to especially thank the following community leaders, including members of the ARPC Executive Committee, for sharing their insights, feedback, and expertise to create and update the 2022-2027 Regional Economic Development Strategy:

Ricky Jones	Franklin County, Commissioner
Kristin Dozier	Leon County, Commissioner (former)
Jim Peacock	Jackson County, Commissioner (former)
Jack Porter	City of Tallahassee, Commissioner
John Jones	City of Monticello, Councilperson
Jim McShane	CareerSource Capital Region, CEO
Richard Williams	Opportunity Florida & CareerSource Chipola, Executive Director
Roy Baker	Opportunity Florida, Business Development Coordinator
Shelly Bell	Tallahassee State College, Vice President for Workforce Development
Darryl Boudreau	Northwest Florida Water Management District, Resource Planning Program Manager
Lisa Miller	Lisa Miller & Associates, CEO
David Melvin	DHM Engineering, Principal & President
Paula Weeks	DHM Engineering, Grants Administrator
Noah Byler	Dewberry Engineering, Project Manager
Jim McKnight	Gulf County Economic Development Committee, Director
TJ Lewis	Gadsden County, Economic Development Director
Shannon Metty	Jefferson County, County Manager
Michelle Metcalf	Wakulla County, Director of Intergovernmental Affairs
Mehmet Oztan	FAMU-FSU College of Engineering, Resilient Infrastructure and Disaster Response (RIDER) Center, Director of Community Engagement
Beth Cicchetti	Gadsden County Development Council & Wakulla Economic Development Council, Director
Sean Lewis	Tallahassee-Leon County Office of Economic Vitality, Special Projects Coordinator
Kara Holbert	Domi Station, Executive Director
Christopher O'Kelley	Florida Commerce, Office of Rural Initiatives, Director

Jennifer Conoley

Florida's Great Northwest, President & CEO

Shane Chadwick

Florida's Great Northwest, Business Intelligence and Marketing Manager