

TALLAHASSEE-LEON COUNTY PLANNING DEPARTMENT
2005 Statistical Digest
July 2005

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Section 1

Demographics

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1.1 Population Estimates and Projections

Population growth in Leon County has been relatively stable over the last few decades (45,608 in the 1970's, 43,838 in the 1980's and 46,959 in the 1990's). Since 2000, population growth has been ahead of historical averages, led by an estimated net increase of 7,461 residents in 2003 and 8,396 in 2004.

**Figure 1-1
Population Estimates (1930-2004)**

Year	Tallahassee	Unincorporated	Leon County
1930	10,700	12,776	23,476
1940	16,240	15,406	31,646
1950	27,237	24,353	51,590
1960	48,174	26,051	74,225
1970	71,897	31,150	103,047
1980	81,548	67,107	148,655
1990	124,773	67,720	192,493
2000	150,624	88,828	239,452
2001	153,658	90,550	244,208
2002	156,703	91,336	248,039
2003	162,310	93,190	255,500
2004	169,136	94,760	263,896

Sources: U.S. Department of Commerce, Bureau of the Census (1930-2000); University of Florida, Bureau of Economic and Business Research (2001-2004 estimates)

**Figure 1-2
Population Projections (2005-2030)**

Year	Tallahassee	Unincorporated	Leon County
2005	171,600	96,300	267,900
2010	184,500	103,900	288,400
2015	197,000	111,300	308,300
2020	208,200	117,900	326,100
2025	218,900	124,200	343,100
2030	228,800	130,200	359,000

Sources: University of Florida, Bureau of Economic and Business Research (2005-2030 projections)
Tallahassee-Leon County Planning Department (Tallahassee 2005-2030 projections assuming continued annexations)

1.2 Population Estimates by Census Tract

By estimated percentage growth in population by census tract, census tract 26.01 increased in population by more than 50% between 2000 and 2004. Six other census tracts grew 20% or more. By estimated total population growth, nine census tracts added more than 1,000 net new residents.

Figure 1-3
Population Estimates by Census Tract (2000-2004)

Census Tract*	Total Population 2000 Census	Estimated Pop. Growth 2000-2004	Total Pop. 2004 Estimate	Estimated % Growth by Census Tract 2000-2004
2	3,811	22	3,833	0.6%
3.01	1,526	6	1,532	0.4%
3.02	2,399	13	2,412	0.5%
3.03	3,275	47	3,322	1.4%
4	2,940	266	3,206	9.1%
5	4,569	369	4,938	8.1%
6	2,900	180	3,080	6.2%
7	1,968	0	1,968	0.0%
8	2,937	42	2,979	1.4%
9.01	6,849	97	6,946	1.4%
9.02	8,261	129	8,390	1.6%
10.01	2,324	234	2,558	10.1%
10.02	1,752	400	2,152	22.8%
11.01	2,885	189	3,074	6.6%
11.02	2,070	65	2,135	3.1%
12	1,030	166	1,196	16.1%
13	2,591	261	2,852	10.1%
14	6,870	467	7,337	6.8%
15	4,041	378	4,419	9.4%
16.01	4,022	1,298	5,320	32.3%
16.02	3,064	226	3,290	7.4%
17	7,104	451	7,555	6.3%
18.01	3,643	344	3,987	9.4%
18.02	3,466	970	4,436	28.0%
19	7,070	313	7,383	4.4%
20.01	7,392	468	7,860	6.3%
20.02	7,912	1,914	9,826	24.2%
21.01	3,847	475	4,322	12.4%
21.02	7,557	1,273	8,830	16.8%
22.01	5,220	265	5,485	5.1%
22.03	7,594	211	7,805	2.8%
22.04	7,172	273	7,445	3.8%
23.02	3,409	144	3,553	4.2%
23.03	3,291	463	3,754	14.1%
23.04	2,494	148	2,642	5.9%
24.03	2,737	250	2,987	9.1%
24.05	10,090	1,986	12,076	19.7%
24.07	7,228	1,371	8,599	19.0%
24.08	7,600	238	7,838	3.1%
24.09	8,573	252	8,825	2.9%
24.10	5,583	233	5,816	4.2%
25.02	9,654	1,212	10,866	12.6%
25.04	7,517	1,805	9,322	24.0%
25.05	4,719	773	5,492	16.4%
25.06	6,664	1,370	8,034	20.6%
26.01	2,998	1,565	4,563	52.2%
26.02	7,425	350	7,775	4.7%
27	9,409	472	9,881	5.0%

Note: TLCPD's estimation methodology was used to estimate the population growth by census tract

* A map of the 2000 Census tracts for Leon County can be found in the last page of this publication.

Sources: U.S. Department of Commerce, Bureau of the Census; University of Florida, Bureau of Economic and Business Research; Tallahassee-Leon County Planning Department

1.3 Age and Gender

More than one-third of the population of Leon County is between the ages of 18 and 34 (second highest rate in the State behind Alachua County). At 8.4%, Leon County has the second lowest percentage of population aged 65 and older (behind Union County, 7.8%). The 55-64 year old age group increased by more than three times the County average annual percentage population growth rate of 2.6% between 2000 and 2004 while the 80+ age group increased slightly more than twice the average annual percentage growth rate for the population of Leon County.

Figure 1-4
Leon County Population by Age and Gender (2004 Estimate)

Age Group	Total	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	14,135	5.4%	6,945	2.6%	7,190	2.7%
5 to 17	39,619	15.0%	19,365	7.3%	20,254	7.7%
18 to 34	97,562	37.0%	51,156	19.4%	46,406	17.6%
35 to 54	68,370	25.9%	36,029	13.7%	32,341	12.3%
55 to 64	22,034	8.3%	11,432	4.3%	10,602	4.0%
65 to 79	15,755	6.0%	8,780	3.3%	6,975	2.6%
80+	6,421	2.4%	4,267	1.6%	2,154	0.8%
Total	263,896		137,974	52.3%	125,922	47.7%

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 142", June 2005

Figure 1-5
Leon County Population Growth by Age Group (2000-2004)

Age Group	2000 Population	2004 Population	Growth in Population 2000-2004	Percent Growth 2000-2004	Avg. Ann. Growth 2000-2004
0 to 4	13,727	14,135	408	3.0%	0.7%
5 to 17	37,280	39,619	2,339	6.3%	1.6%
18 to 34	86,609	97,562	10,953	12.6%	3.2%
35 to 54	65,284	68,370	3,086	4.7%	1.2%
55 to 64	16,661	22,034	5,373	32.2%	8.1%
65 to 79	14,600	15,755	1,155	7.9%	2.0%
80+	5,291	6,421	1,130	21.4%	5.3%
Total	239,452	263,896	24,444	10.2%	2.6%

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 142", June 2005

1.4 Race and Ethnicity

In terms of race and ethnicity, Leon County's population includes 62.5% non-hispanic white, 31.0% non-hispanic black, 3.8% of hispanic origin and 2.7% of "other" races and ethnicities.

Figure 1-6
Leon County Population by Age, Race and Ethnicity (2004 Estimate)

Age Group	All Races	Non-Hispanic	Non-Hispanic	Other	Hispanic
		White	Black		Origin
0 to 4	14,135	7,641	5,499	473	522
5 to 17	39,619	21,699	15,184	1,304	1,432
18 to 34	97,562	55,078	34,039	2,924	5,521
35 to 54	68,370	46,484	18,290	1,572	2,024
55 to 64	22,034	16,900	4,389	378	367
65 to 79	15,755	12,043	3,217	275	220
80+	6,421	5,180	1,081	93	67
Total	263,896	165,025	81,699	7,019	10,153

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

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 142", June 2005

Figure 1-7
Leon County Pop. by Percentage, Race and Ethnicity (2004 Estimate)

Age Group	Non-Hispanic	Non-Hispanic	Other	Hispanic
	White	Black		Origin
0 to 4	57.9%	38.7%	3.4%	3.6%
5 to 17	60.8%	36.1%	3.1%	3.8%
18 to 34	62.6%	34.4%	3.0%	5.1%
35 to 54	71.9%	25.9%	2.2%	2.9%
55 to 64	79.0%	19.3%	1.6%	1.8%
65 to 79	79.1%	19.3%	1.6%	1.5%
80+	81.1%	17.5%	1.4%	1.3%
Total	62.5%	31.0%	2.7%	3.8%

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

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 142", June 2005

1.5 Components of Population Change

The components of population change in Leon County have shifted slightly since 2000 in comparison with the 1990-2000 time period. The percentage of Leon County's population growth associated with net migration has been 76.3% since 2000 compared with 67.1% between 1990 and 2000.

Figure 1-8
Components of Population Change (2000-2004)

	Leon County	State of Florida
Total Population Change (2000-2004)	24,444	1,553,908
Net Natural Increase	5,783	161,472
Net Migration	18,661	1,372,436
Percent due to Natural Increase	23.7%	10.4%
Percent due to Net Migration	76.3%	88.3%

Source: University of Florida, Bureau of Economic and Business Research, "Florida Estimates of Population, 2004"

Figure 1-9
Components of Population Change (1990-2000)

	Leon County	State of Florida
Total Population Change (1990-2000)	46,959	3,044,307
Net Natural Increase	15,457	448,216
Net Migration	31,502	2,596,091
Percent due to Natural Increase	32.9%	14.7%
Percent due to Net Migration	67.1%	85.3%

Source: University of Florida, Bureau of Economic and Business Research, "Population: Census Summary, 2000"

1.6 Population Growth by Metropolitan Area

The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was 350,322 in 2004, up 9.4% from 2000.

Figure 1-10
Population Growth in Florida Metropolitan Areas (2000-2004)

Metropolitan Area/County(ies)	2004 Population Estimate	2000 Census Population	Percent Change 2000- 2004
Tampa-St. Petersburg-Clearwater (<i>Hernando, Hillsborough, Pasco, Pinellas</i>)	2,587,058	2,396,013	8.0%
Miami-Miami Beach-Kendall (<i>Miami-Dade</i>)	2,379,818	2,253,779	5.6%
Orlando (<i>Lake, Orange, Osceola, Seminole</i>)	1,894,992	1,644,563	15.2%
Fort Lauderdale-Pompano Beach-Deerfield Beach (<i>Broward</i>)	1,723,131	1,623,018	6.2%
West Palm Beach-Boca Raton-Boynton Beach (<i>Palm Beach</i>)	1,242,270	1,131,191	9.8%
Jacksonville (<i>Baker, Clay, Duval, Nassau, St. Johns</i>)	1,242,250	1,122,750	10.6%
Sarasota-Bradenton-Venice (<i>Manatee, Sarasota</i>)	653,549	589,963	10.8%
Lakeland (<i>Polk</i>)	528,389	483,924	9.2%
Palm Bay-Melbourne-Titusville (<i>Brevard</i>)	521,422	476,230	9.5%
Cape Coral-Fort Myers (<i>Lee</i>)	521,253	440,888	18.2%
Deltona-Daytona Beach-Ormond Beach (<i>Volusia</i>)	484,261	443,343	9.2%
Pensacola-Ferry Pass-Brent (<i>Escambia, Santa Rosa</i>)	440,947	412,153	7.0%
Port St. Lucie-Fort Pierce (<i>Martin, St. Lucie</i>)	363,853	319,426	13.9%
Tallahassee (<i>Gadsden, Jefferson, Leon, Wakulla</i>)	350,322	320,304	9.4%
Naples-Marco Island (<i>Collier</i>)	306,186	251,377	21.8%
Ocala (<i>Marion</i>)	293,317	258,916	13.3%
Gainesville (<i>Alachua, Gilchrist</i>)	252,074	232,392	8.5%
Fort Walton Beach-Crestview-Destin (<i>Okaloosa</i>)	185,778	170,498	9.0%
Panama City-Lynn Haven (<i>Bay</i>)	158,437	148,217	6.9%
Punta Gorda (<i>Charlotte</i>)	156,985	141,627	10.8%
Vero Beach (<i>Indian River</i>)	126,829	112,947	12.3%

Sources: U.S. Department of Commerce, Bureau of the Census, University of Florida, Bureau of Economic and Business Research

1.7 Household Characteristics

The average household size has been decreasing slowly in Leon County, from 2.43 persons per household in 1990 to an estimated 2.33 persons per household in 2004. 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.

Figure 1-11
Number of Households and Average Household Size
(1990, 2000 and 2004)

	Estimate April 1, 2004		Census April 1, 2000		Census April 1, 1990	
	Households	Average Household Size	Households	Average Household Size	Households	Average Household Size
Leon County	106,873	2.33	96,521	2.34	74,828	2.43
Florida	6,949,759	2.46	6,338,075	2.46	5,134,869	2.46

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 140", January 2005

Figure 1-12
Households by Type (2000)

	Families	Living Alone	Other Non-Families
Leon County	56%	30%	14%
City of Tallahassee	47%	35%	18%
Unincorporated	75%	20%	5%
Florida	66%	27%	7%

Source: U.S. Department of Commerce, Bureau of the Census, 2000 Census of Population and Housing, Summary File 3

1.8 Educational Attainment

The level of educational attainment in Leon County increased between 1990 and 2000. In 2000, 10.9% of the population 25 years and over did not receive a high school diploma, down from 15.1% in 2000. Also, 41.7% of the population 25 years and over in Leon County had attained a bachelor's degree or higher compared with 37.1% in 1990.

Figure 1-13
Educational Attainment in Leon County, Population 25 years and over (2000)

	1990	Percent	2000	Percent
Less than 9th grade	6,046	5.5%	4,218	3.1%
9th to 12th grade, no diploma	10,622	9.6%	10,749	7.8%
H.S. graduate (inc. equivalency)	23,793	21.6%	25,963	18.9%
Some college, no degree	20,414	18.5%	27,956	20.3%
Associate degree	8,457	7.7%	11,255	8.2%
Bachelor's degree	23,675	21.5%	33,040	24.0%
Graduate or professional degree	17,180	15.6%	24,356	17.7%
Total	110,187		137,537	

Source: U.S. Department of Commerce, Bureau of the Census, 1990, 2000

Figure 1-14
Educational Attainment, Population 25 years and over (2000)

	Leon County		State of Florida		United States	
	Number	Percent	Number	Percent	Number	Percent
Less than 9th grade	4,218	3.1%	739,222	6.7%	13,755,477	7.5%
9th to 12th grade, no diploma	10,749	7.8%	1,480,726	13.4%	21,960,148	12.1%
H.S. graduate (inc. equivalency)	25,963	18.9%	3,165,748	28.7%	52,168,981	28.6%
Some college, no degree	27,956	20.3%	2,403,135	21.8%	38,351,595	21.0%
Associate degree	11,255	8.2%	773,486	7.0%	11,512,833	6.3%
Bachelor's degree	33,040	24.0%	1,573,121	14.3%	28,317,792	15.5%
Graduate or professional degree	24,356	17.7%	889,207	8.1%	16,144,813	8.9%
Total	137,537		11,024,645		182,211,639	

Source: U.S. Department of Commerce, Bureau of the Census, 2000

Section 2

Labor Force and Income

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2.1 Labor Force and Employment

Overall labor force and employment growth in both Tallahassee and Leon County has been positive over the past two years (2003 and 2004) compared to declining levels between 2000 and 2002. The rates of change have been similar in both the City of Tallahassee and the unincorporated areas.

**Figure 2-1
Labor Force (2000-2004)**

	2000	2001	2002	2003	2004
Leon County	134,597	133,969	132,832	133,760	134,146
% Change From Previous	-0.8%	-0.5%	-0.8%	0.7%	0.3%
City of Tallahassee	83,015	82,703	82,147	82,674	82,869
% Change From Previous	n/a	-0.4%	-0.7%	0.6%	0.2%
Unincorporated Leon County	51,582	51,266	50,685	51,086	51,277
% Change From Previous	n/a	-0.6%	-1.1%	0.8%	0.4%

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Local Area Unemployment Statistics

**Figure 2-2
Employment (2000-2004)**

	2000	2001	2002	2003	2004
Leon County	130,493	129,273	126,982	128,251	128,989
% Change From Previous	-1.3%	-0.9%	-1.8%	1.0%	0.6%
City of Tallahassee	80,000	79,252	77,848	78,626	79,079
% Change From Previous	n/a	-0.9%	-1.8%	1.0%	0.6%
Unincorporated Leon County	50,493	50,021	49,134	49,625	49,910
% Change From Previous	n/a	-0.9%	-1.8%	1.0%	0.6%

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Local Area Unemployment Statistics

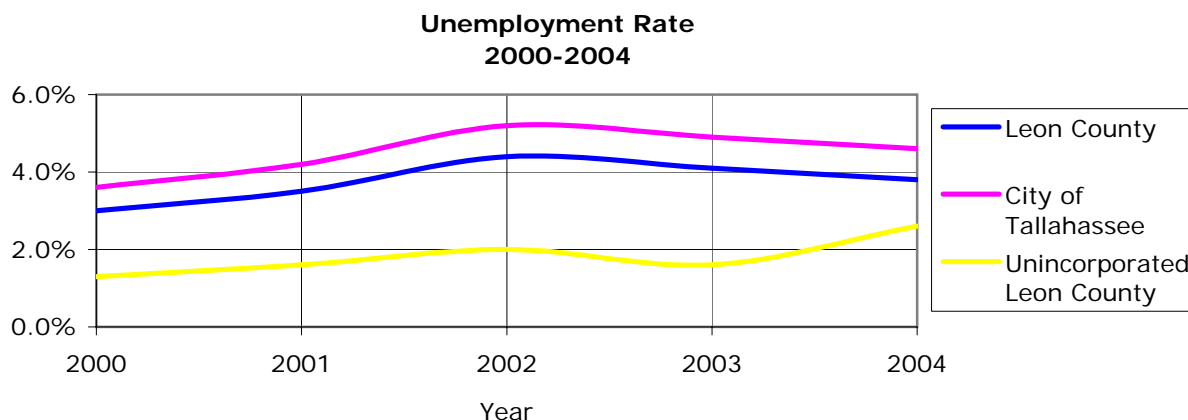
2.2 Unemployment

The unemployment rate in Leon County and the City of Tallahassee declined in both 2003 and 2004. These place of residence figures indicate a slight increase in unemployment in 2004 for residents of unincorporated Leon County. Initial claims for unemployment compensation have declined considerably over the past two years (most notably when compared with an increase for the state as a whole in 2004).

**Figure 2-3
Unemployment Rate (2000-2004)**

	2000	2001	2002	2003	2004
Leon County	3.0%	3.5%	4.4%	4.1%	3.8%
City of Tallahassee	3.6%	4.2%	5.2%	4.9%	4.6%
Unincorporated Leon County	1.3%	1.6%	2.0%	1.6%	2.6%

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Local Area Unemployment Statistics



Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Local Area Unemployment Statistics

**Figure 2-4
Initial Claims for Unemployment Compensation (2000-2004)**

	2000	2001	2002	2003	2004
Leon County	3,954	5,022	5,999	5,633	5,269
% Change from Previous		27.0%	19.5%	-6.1%	-6.5%
Florida	373,531	522,754	559,179	535,455	551,578
% Change from Previous		39.9%	7.0%	-4.2%	3.0%

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Unemployment Compensation Files

2.3 Employment by Industry

Since 2000, non-agricultural employment in the Tallahassee MSA has grown 1.1% per year on average. Leisure and hospitality and natural resources, mining and construction grew an average of 4.3% and 3.1% respectively annually while information based industries and manufacturing respectively declined 4.2% and 4.6% annually.

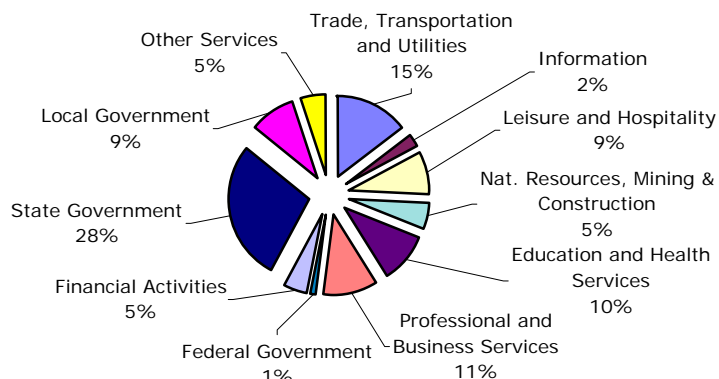
**Figure 2-5
Non-Agricultural Employment by Industry,
Tallahassee MSA (2000-2004)**

	2000	2001	2002	2003	2004	Average Annual Change
Leisure and Hospitality	12,100	13,000	13,400	13,600	14,300	4.3%
Nat. Resources, Mining & Construction	7,300	6,900	7,200	7,700	8,200	3.1%
Financial Activities	7,000	6,900	7,500	7,700	7,700	2.5%
Local Government	14,600	14,700	14,700	14,900	15,200	1.0%
Professional and Business Services	17,600	18,700	18,200	18,200	18,000	0.6%
State Government	45,600	45,600	45,400	45,700	46,000	0.2%
Federal Government	2,000	1,900	1,900	2,000	2,000	0.1%
Other Services	8,200	8,100	8,100	7,800	8,000	-0.6%
Education and Health Services	16,800	16,800	16,500	16,700	16,400	-0.6%
Trade, Transportation and Utilities	25,400	24,100	23,400	23,500	24,300	-1.1%
Information	4,800	4,600	4,000	3,800	4,000	-4.2%
Manufacturing	5,100	4,400	4,200	4,100	4,200	-4.6%
Total	166,600	165,900	164,400	165,700	168,100	1.1%

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Current Employment Statistics (CES)

**Figure 2-6
Non-Agricultural Employment by Industry,
Tallahassee MSA (2004)**

Non-Agricultural Employment by Industry, Tallahassee MSA, 2004



Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Current Employment Statistics (CES)

2.4 State Government Employment

Overall state government employment remained relatively stable between August 2002 and August 2004. Florida State University experienced the greatest growth in full time employment over the two-year period (450 additional employees). OPS or part-time employment increased by more than 8% from August 2003 to August 2004.

Figure 2-7
State Government Employment, Leon County (Full Time Employees)

	August 2003	August 2004	Net Change 8/03-8/04	Percent Change 8/03-8/04	August 2002
Total State Government Employment	30,752	30,834	82	0.3%	31,017
State Agencies	21,324	21,169	-155	-0.7%	21,817
Non University	23,308	23,133	-175	-0.8%	23,849
University	7,444	7,701	257	3.5%	7,168
Non-Agency, Non-University Detail					
Legislature	866	857	-9	-1.0%	871
Auditor General	226	221	-5	-2.2%	238
State Court	377	393	16	4.2%	388
Office of the Governor	262	258	-4	-1.5%	256
Lottery	253	235	-18	-7.1%	279
University Detail					
University of Florida	19	0	-19	-100.0%	16
Florida State University	5,592	5,830	238	4.3%	5,380
Florida A&M University	1,833	1,871	38	2.1%	1,772
OPS (part time)	8,588	9,301	713	8.3%	n/a

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Special Request

2.5 Projected Employment by Industry

In terms of both total employment growth and percentage of annual change projected by industry between 2004 and 2012 in Leon County, three industries top the list in both categories (professional and business services, leisure and hospitality and education and health services).

Figure 2-8
Projected Employment by Industry (2004-2012)

Industry	2004 Employment	2012 Employment	Total	Percentage
			Employment Annual Change	Annual Change
Total All Industries	161,355	180,924	2,446	1.5%
Professional and Business Services	17,781	22,573	599	3.4%
Leisure and Hospitality	12,927	15,779	356	2.8%
Education and Health Services	16,085	19,406	415	2.6%
Construction	6,177	7,297	140	2.3%
Financial Activities	6,947	7,948	125	1.8%
Local Government	11,622	13,110	186	1.6%
Transportation and Warehousing	1,383	1,554	21	1.6%
Other Services (Except Government)	7,427	8,306	110	1.5%
Wholesale Trade	2,832	3,124	36	1.3%
Information	3,924	4,251	41	1.0%
Retail Trade	16,230	17,380	144	0.9%
State Government	41,867	44,066	275	0.7%
Federal Government	1,739	1,772	4	0.2%
Self-Employed & Unpaid Family Workers	11,863	11,832	-4	0.0%
Manufacturing	2,219	2,216	0	0.0%
Agriculture, Forestry, Fishing and Hunting	224	210	-2	-0.8%

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Florida Employment Forecast

2.6 Projected Employment by Occupation

In terms of the projected percentage annual growth by occupation in Leon County, the top five occupations are either in the technology or medical field. Retail occupations (food preparation and waiters/waitresses) top the list for the projected greatest total job growth followed closely by registered nurses and lawyers.

Figure 2-9
Fastest Growing Occupations (2004-2012)

Industry	2004 Emp.	2012 Emp.	Total Emp. Change	Percentage
				Annual Change
Computer Software Engineers, Systems Software	401	559	158	4.9%
Medical Records and Health Information Technicians	247	338	91	4.6%
Computer Software Engineers, Applications	207	283	76	4.6%
Medical Assistants	598	816	218	4.6%
Physical Therapists	142	188	46	4.0%
Tile and Marble Setters	177	233	56	4.0%
Medical Transcriptionists	210	276	66	3.9%
Food Preparation & Serving Workers, Inc. Fast Food	2,391	3,121	730	3.8%
Dental Hygienists	178	232	54	3.8%
English Language & Lit. Teachers, Postsecondary	223	289	66	3.7%
Pharmacists	153	198	45	3.7%
Bill and Account Collectors	446	576	130	3.6%

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Florida Employment Forecast

Figure 2-10
Occupations Gaining the Most New Jobs (2004-2012)

Industry	2004 Emp.	2012 Emp.	Total Emp. Change	Percentage
				Annual Change
Food Preparation & Serving Workers, Inc. Fast Food	2,391	3,121	730	3.8%
Waiters and Waitresses	2,878	3,546	668	2.9%
Registered Nurses	2,790	3,398	608	2.7%
Lawyers	2,701	3,289	588	2.7%
Janitors & Cleaners, Except Maids & Housekeeping	2,769	3,167	398	1.8%
Nursing Aides, Orderlies, and Attendants	1,639	2,013	374	2.9%
Network Systems and Data Communications Analyst	1,323	1,688	365	3.5%
Cashiers	3,344	3,684	340	1.3%
Licensed Practical and Licensed Vocational Nurses	1,192	1,531	339	3.6%
Customer Service Representatives	1,765	2,107	342	2.4%
Retail Salespersons	4,496	4,828	332	0.9%
Food Preparation Workers	1,168	1,499	331	3.5%

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Florida Employment Forecast

2.7 Median Family Income

The median family income in Leon County stood at \$52,962 according to the 2000 Census and is estimated to be \$57,700 as of 2005 for the Tallahassee MSA. Median family income wage growth in the decade of the 1990's was less than half the rate of the 1980's.

Figure 2-11
Median Family Income in Current Dollars (1980, 1990, 2000)

Median Family Income	1980	1990	2000	Annual Change	
				1980-1990	1990-2000
Leon County	\$18,916	\$37,000	\$52,962	9.6%	4.3%
Tallahassee MSA*	\$18,448	\$34,475	\$50,086	8.7%	4.5%
City of Tallahassee	\$16,982	\$34,764	\$49,359	10.5%	4.2%
Unincorporated Leon County	\$20,697	\$40,057	\$57,232	9.4%	4.3%
Florida	\$17,280	\$32,212	\$45,625	8.6%	4.2%

*Note: In the 1980 Census the Tallahassee MSA included Leon and Wakulla County, in the 1990 and 2000 Census' the Tallahassee MSA included Leon and Gadsden Counties

Source: U.S. Department of Commerce, Bureau of the Census, 1980, 1990, 2000

Figure 2-12
Median Family Income in Constant Year 2000 Dollars

Median Family Income	1980	1990	2000	Annual Change	
				1980-1990	1990-2000
Leon County	\$39,547	\$48,749	\$52,962	2.3%	0.9%
Tallahassee MSA*	\$38,553	\$45,422	\$50,086	1.8%	1.0%
City of Tallahassee	\$35,504	\$45,803	\$49,359	2.9%	0.8%
Unincorporated Leon County	\$43,270	\$52,776	\$57,232	2.2%	0.8%
Florida	\$36,127	\$42,440	\$45,625	1.8%	0.8%

*Note: In the 1980 Census the Tallahassee MSA included Leon and Wakulla County, in the 1990 and 2000 Census' the Tallahassee MSA included Leon and Gadsden Counties

Source: U.S. Department of Commerce, Bureau of the Census, 1980, 1990, 2000

Figure 2-13
Median Family Income Estimates (2001-2005)

Median Family Income	2001	2002	2003	2004	2005
Tallahassee MSA*	\$54,900	\$57,200	\$54,500	\$56,500	\$57,700
Florida	\$49,400	\$51,800	\$50,200	\$51,900	\$52,550

*Note: Tallahassee MSA for this report is defined as Leon and Gadsden Counties

Source: U.S. Department of Housing and Urban Development (HUD)

2.8 Average Annual Employment/Wages

The average annual wage in Leon County in 2003 was \$32,059, 4.5% below the state average wage of \$33,553. The annual average state government wage was 10.3% higher in Leon County compared to the state average while the local government wage was 7.7% lower than the state average.

Figure 2-14
Average Annual Employment and Wages by Ownership (2003)

	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
All Ownerships	7,168	141,599	\$32,059
Private Ownerships	6,904	86,421	\$29,797
Federal Government	41	1,728	\$54,327
State Government	200	41,934	\$35,401
Local Government	23	11,516	\$33,529
Florida			
All Ownerships	501,599	7,241,559	\$33,553
Private Ownerships	495,625	6,208,524	\$32,914
Federal Government	1,084	126,364	\$52,244
State Government	3,589	215,790	\$32,090
Local Government	1,301	690,880	\$36,334

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Quarterly Census of Employment & Wages (ES-202)

Figure 2-15
Average Annual Employment & Wages, Select Private Industries (2003)

	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
Professional and Business Services	1,653	15,196	\$40,512
Financial Activities	782	6,849	\$39,829
Construction	681	6,073	\$30,449
Information	177	3,498	\$38,934
Manufacturing	131	2,178	\$33,277
Florida			
Professional and Business Services	103,250	1,255,467	\$34,644
Financial Activities	53,901	483,469	\$47,239
Construction	50,527	444,219	\$35,268
Information	8,982	171,712	\$47,431
Manufacturing	16,493	386,497	\$40,935

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Quarterly Census of Employment & Wages (ES-202)

2.9 Occupational Employment and Wages

The 2005 estimated average hourly wage for all occupations in the Tallahassee MSA is \$17.06. The area median wage is \$13.72, with the entry wage of \$7.99 and \$21.59 per hour for experienced workers in their occupation.

Figure 2-16
Occupational Emp. and Wages, 1,000+ Employment,
Tallahassee MSA (2005)

Occupational Title	2004 Emp.	Hourly Wage (2005 Wage Estimates in dollars)			
		Mean	Median	Entry*	Exp.**
Total All Occupations	152,870	\$17.06	\$13.72	\$7.99	\$21.59
Office Clerks, General	4,870	\$11.49	\$10.77	\$8.00	\$13.23
Retail Salespersons	4,750	\$10.11	\$8.57	\$6.39	\$11.97
Executive Secretaries and Administrative Assistants	3,900	\$15.32	\$14.96	\$11.81	\$17.08
Cashiers	3,760	\$7.85	\$7.21	\$6.09	\$8.72
Management Analysts	3,680	\$25.11	\$22.36	\$17.34	\$29.00
Accountants and Auditors	2,890	\$20.32	\$18.14	\$13.54	\$23.70
Janitors and Cleaners, Ex.Maids and Hskping.	2,860	\$8.99	\$8.29	\$7.22	\$9.87
Waiters and Waitresses	2,780	\$6.95	\$6.49	\$6.01	\$7.42
Comb. Food Pre. & Serving Workers, Inc. Fast Food	2,470	\$7.13	\$6.71	\$6.00	\$7.70
Bookkeeping, Accounting, and Auditing Clerks	2,230	\$12.92	\$12.59	\$9.03	\$14.86
Secretaries, Except Legal, Medical, and Executive	2,230	\$11.90	\$11.30	\$9.05	\$13.32
Customer Service Representatives	2,100	\$13.15	\$12.98	\$9.11	\$15.16
Registered Nurses	2,090	\$24.08	\$23.48	18..39	\$26.93
First-Line Supers./Mgrs. of Ofc. & Admin. Sup. Wkrs	1,980	\$19.71	\$18.27	\$13.14	\$22.99
Lawyers	1,790	\$43.31	\$34.91	\$25.99	\$51.98
Stock Clerks and Order Fillers	1,660	\$9.80	\$9.77	\$7.03	\$11.18
Nursing Aides, Orderlies, and Attendants	1,550	\$8.98	\$8.78	\$7.51	\$9.71
Laborers & Freight, Stock, & Material Movers, Hand	1,540	\$9.41	\$8.80	\$7.36	\$10.43
Receptionists and Information Clerks	1,470	\$10.07	\$9.91	\$7.56	\$11.33
Sales Reps., Whlsle. & Mfg., Exc. Tech. & Scientific	1,310	\$22.02	\$19.00	\$10.43	\$27.82
General and Operations Managers	1,310	\$38.43	\$34.69	\$19.04	\$48.12
Business Operations Specialists, All Other	1,230	\$22.91	\$21.51	\$15.96	\$26.38
Postsecondary Teachers, All Other***	1,150	\$59,189	\$53,306	\$33,026	\$72,270
Comp. Ofcrs., Ex. Ag., Cons., Hlth., Safety & Trans.	1,150	\$16.24	\$15.18	\$12.24	\$18.25
Security Guards	1,140	\$9.80	\$9.08	\$6.64	\$11.38
First-Line Supervisors/Mgrs of Retail Sales Workers	1,100	\$19.08	\$15.20	\$10.56	\$23.32
Maintenance and Repair Workers, General	1,030	\$12.85	\$12.61	\$9.07	\$14.74
Computer Support Specialists	1,020	\$18.83	\$16.63	\$11.90	\$22.30
Cooks, Fast Food	1,000	\$7.65	\$7.44	\$6.05	\$8.45

* *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.

*** *Annual Wage*

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Occupational Employment, Statistics and Wages

2.10 Per Capita Income

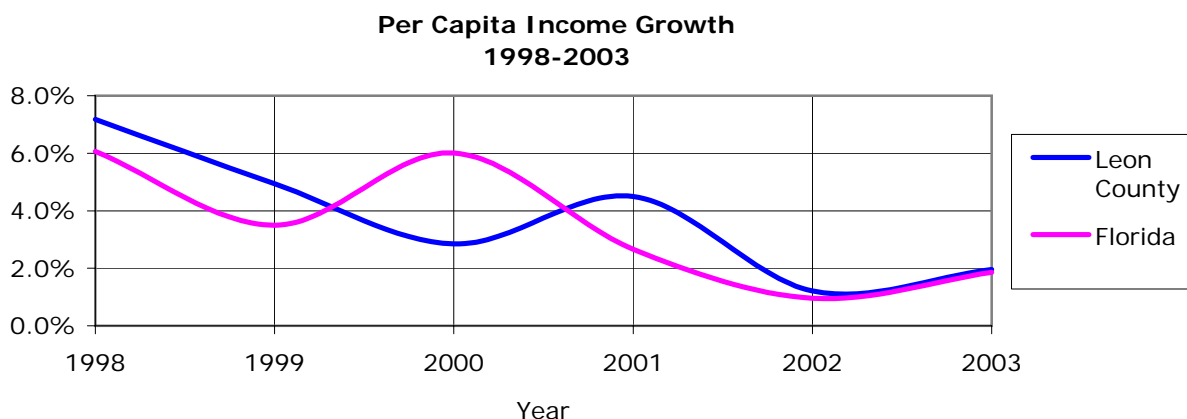
Per capita income grew 2.0% in Leon County in 2003 (up from 1.2% the previous year) and was 93.4% of the per capita income for the state. Per capita income tends to be lower in Leon County due to the large number of college students in our community.

Figure 2-17
Per Capita Income (1998-2003)

	1998	1999	2000	2001	2002	2003
Leon County	\$24,153	\$25,345	\$26,068	\$27,241	\$27,570	\$28,109
% Change From Previous	7.2%	4.9%	2.9%	4.5%	1.2%	2.0%
Florida	\$25,987	\$26,894	\$28,509	\$29,268	\$29,549	\$30,098
% Change From Previous	6.1%	3.5%	6.0%	2.7%	1.0%	1.9%

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

Figure 2-18
Per Capita Income Growth (1998-2003)



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

2.11 Effective Buying Income

The median household EBI in Leon County in 2004 was \$34,533, 5.7% below the statewide median household EBI.

Figure 2-19
Effective Buying Income (2004)

	Percent of Households by EBI Group			Median Household EBI
	\$20,000 to \$34,999	\$35,000 to \$49,999	\$50,000 and over	
Leon County	22.1%	16.5%	32.9%	\$34,533
City of Tallahassee	23.5%	14.8%	25.7%	\$28,647
Florida	24.8%	18.5%	33.5%	\$36,517

**Note: Effective Buying Income (EBI) is defined as income less personal tax and nontax payments, often referred to as "disposable" income.*

Source: Sales and Marketing Management, 2004 Survey of Buying Power

Section 3

Economic Factors

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3.1 Taxable Sales

The overall level of taxable sales was up 4.4% in Leon County in 2004 following a strong 5.6% growth in 2003. The leading growth categories in 2004 were consumer durables (taxable sales of appliances, furniture, home electronics, etc.) up 12.3% in 2004 and business investment (industrial machinery, medical/optical supplies, commercial rentals, etc.) up 11.7% in 2004. Taxable sales for consumer non-durables (department and clothing stores, drug stores, bookstores, etc.) fell 0.2% in 2004.

**Figure 3-1
Annual Taxable Sales, Tallahassee MSA and Florida (1995-2004)**

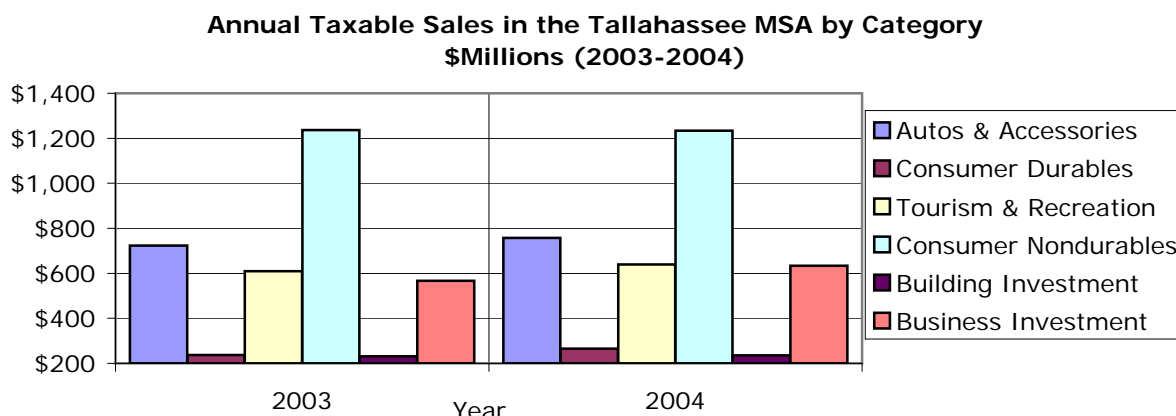
Year	Tallahassee MSA	Change from Previous Year	State of Florida	Change from Previous Year
1995	\$2.64	6.5%	\$177.45	6.0%
1996	\$2.80	6.1%	\$191.03	7.7%
1997	\$2.87	2.5%	\$203.06	6.3%
1998	\$2.98	3.8%	\$217.21	7.0%
1999	\$3.21	7.7%	\$236.05	8.7%
2000	\$3.33	3.7%	\$252.77	7.1%
2001	\$3.36	0.9%	\$255.20	1.0%
2002	\$3.42	1.8%	\$252.91	-0.9%
2003	\$3.61	5.6%	\$265.11	4.8%
2004	\$3.77	4.4%	\$290.26	9.5%

Note: Taxable sales in \$Billions of dollars

Note: Tallahassee MSA includes Leon and Gadsden Counties (previous definition)

Source: Florida Department of Revenue

**Figure 3-2
Annual Taxable Sales, Tallahassee MSA by Category (2003-2004)**



Note: Tallahassee MSA includes Leon and Gadsden Counties (previous definition)

Source: Florida Department of Revenue

3.2 Tallahassee Trade Area

According to retail sales data from Sales and Marketing Management Magazine, Leon County accounted for 62.8% of retail sales within the Tallahassee trade in the 2004 Survey, down from 63.5% in 2003. Per capita retail sales in Leon County are high since a large percentage of the population in neighboring counties travel to Leon County for shopping opportunities.

Figure 3-3
Tallahassee Trade Area-50 mile radius (2004)

County	Major City	Population	Retail Sales (Millions)	Per Capita Retail Sales
Calhoun	Blountstown	12,800	\$89.7	\$7,008
Franklin	Apalachicola	10,400	\$121.9	\$11,719
Gadsden	Quincy	46,000	\$244.5	\$5,316
Jefferson	Monticello	13,900	\$71.8	\$5,165
Leon	Tallahassee	251,400	\$3,352.9	\$13,337
Liberty	Bristol	7,000	\$12.5	\$1,789
Madison	Madison	18,500	\$104.3	\$5,636
Taylor	Perry	19,800	\$137.1	\$6,923
Wakulla	Crawfordville	25,800	\$104.3	\$4,041
Total Florida Counties		405,600	\$4,239.0	\$10,451
Brooks	Quitman	16,400	\$52.5	\$3,200
Decatur	Bainbridge	28,300	\$305.7	\$10,803
Grady	Cairo	23,900	\$204.7	\$8,565
Thomas	Thomasville	43,100	\$540.7	\$12,545
Total Georgia Counties		111,700	\$1,103.6	\$9,880
Total Trade Area		517,300	\$5,342.5	\$10,328
Trade Area Exc. Leon County		265,900	\$1,989.6	\$7,483

Source: Sales and Marketing Management, 2004 Survey of Buying Power, September 2004

3.3 County to County Worker Flows

According to the 2000 Census, Leon County continues to be the employment center for the region. Ninety-five percent of employed Leon County residents work in Leon County. A different situation is evident in the neighboring counties of Gadsden, Wakulla and Jefferson (which along with Leon County comprise the Tallahassee MSA) wherein almost fifty percent of employed residents travel to Leon County for work. In both Wakulla and Jefferson counties, more residents commute to Leon County for work than work in their county of residence. This contrasts to the statewide average of 82.7% of residents who work in their county of residence.

Figure 3-4
Residence County by Workplace County (2000)

Residence County	Workplace County	2000 Count	2000 Percent
Leon County	Leon County	114,007	95.0%
Leon County	Gadsden County	1,937	1.6%
Leon County	Wakulla County	782	0.7%
Leon County	Other	3,284	2.7%
Gadsden County	Gadsden County	8,686	49.0%
Gadsden County	Leon County	8,232	46.4%
Gadsden County	Jackson County	165	0.9%
Gadsden County	Other	660	3.7%
Wakulla County	Leon County	5,764	55.0%
Wakulla County	Wakulla County	4,043	38.6%
Wakulla County	Franklin County	153	1.5%
Wakulla County	Other	515	4.9%
Jefferson County	Leon County	2,552	46.9%
Jefferson County	Jefferson County	2,351	43.2%
Jefferson County	Madison County	163	3.0%
Jefferson County	Other	379	6.9%

Source: U.S. Department of Commerce, Bureau of the Census 2000

3.4 Annual Visitor Trends

Nearly 2.8 million people (i.e. person visits) visited Leon County in 2004, up 8.3% from 2003. Total visitor spending rebounded slightly in 2004 after falling in 2003.

Figure 3-5
Annual Visitor Trends-Person Visits (1997-2004)

	1997	1998	1999	2000	2001	2002	2003	2004
Person Visits	1,851	1,940	2,133	2,430	2,203	2,352	2,571	2,785

Note: Data in Thousands

Source: Leon County Tourist Development Council

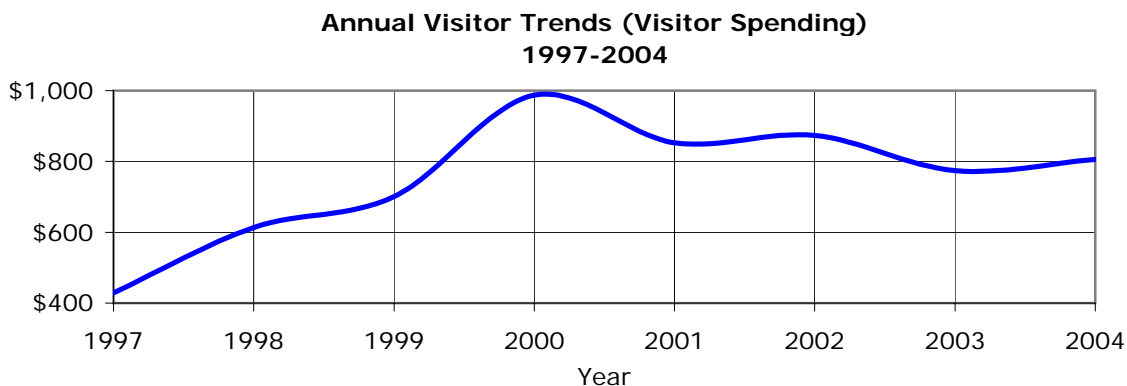


Figure 3-6
Annual Visitor Trends-Annual Visitor Spending (1997-2004)

	1997	1998	1999	2000	2001	2002	2003	2004
Visitor Spending	\$429	\$613	\$701	\$988	\$853	\$874	\$774	\$805

Note: Data in Millions

Source: Leon County Tourist Development Council



3.5 Florida County Retail Price Index

Leon County's Retail Price Index in 2004 was 94.56 (the state population weighted average is 100, thus in Leon County the basket of goods and services purchased by the average Floridian would cost 5.44% less than the state average).

Figure 3-7
Florida County Retail Price Index (2004)

County	Total	Food	Medical Care	Housing	Other Goods & Services	Transportation
Leon	94.56	101.48	97.00	85.85	99.56	99.79
Gadsden	92.20	105.68	98.04	80.14	97.04	98.37
Jefferson	91.41	102.41	87.69	80.79	97.53	98.12
Wakulla	91.36	101.52	92.70	81.53	95.39	97.93

Note: Each index is constructed so that the population-weighted average is 100. The Florida County Retail Price Index is an index of the relative income required to purchase the same basket of goods and services purchased by the average Floridian in each of Florida's counties at a particular point in time, in this case third quarter 2004.

Source: University of Florida, Bureau of Economic and Business Research

3.6 ACCRA Cost of Living Index

The ACCRA Cost of Living Index measures relative price levels for consumer goods and services in 300+ cities in the United States and Canada. For the third quarter 2004, the cost of living index for Tallahassee was 1.4% above the average of the other cities surveyed in that quarter.

Transportation (primarily due to gasoline prices), utilities (60% due to home energy costs and 40% home telephone costs) and health (doctor visit cost, dental visit cost, and prescription and non-prescription medication costs) had the highest indices.

Figure 3-8

Cost of Living Indices for Select Florida Cities (Third Quarter 2004)

City	100% Composite Index	13% Grocery Items	30% Housing	9% Utilities	9% Transport.	4% Health	35% Misc. Goods & Services
Tallahassee	101.4	99.7	99.5	103.9	106.8	103.5	101.4
Pensacola	100.4	102.0	99.2	90.8	94.7	85.6	106.6
Fort Walton Beach	99.2	101.6	96.3	85.7	97.3	104.6	104.2
Tampa	98.8	99.1	99.4	91.1	106.2	103.3	97.6
Orlando	97.7	95.3	87.8	98.7	95.9	94.0	107.6
Gainesville	97.4	109.3	95.9	89.7	104.6	91.2	95.0
Panama City	95.6	99.9	82.8	93.0	105.8	100.3	102.6
Jacksonville	92.2	100.9	88.7	81.4	99.2	88.3	93.5

Note: This is a cross sectional study that compares the relative price levels for consumer goods and services in participating areas. It does not measure inflation. Because each quarterly report is a separate comparison of prices at a single point in time, and because both the number and the mix of participants may change for one quarter to the next, index data from different quarters cannot be compared. The Index reflects cost differentials for the standard of living present in a professional and/or managerial household. Operationally, this standard of living is set by the weighting structure indicated above column headings.

Source: ACCRA Cost of Living Index, Third Quarter 2004

3.7 Consumer Price Index (CPI-U)

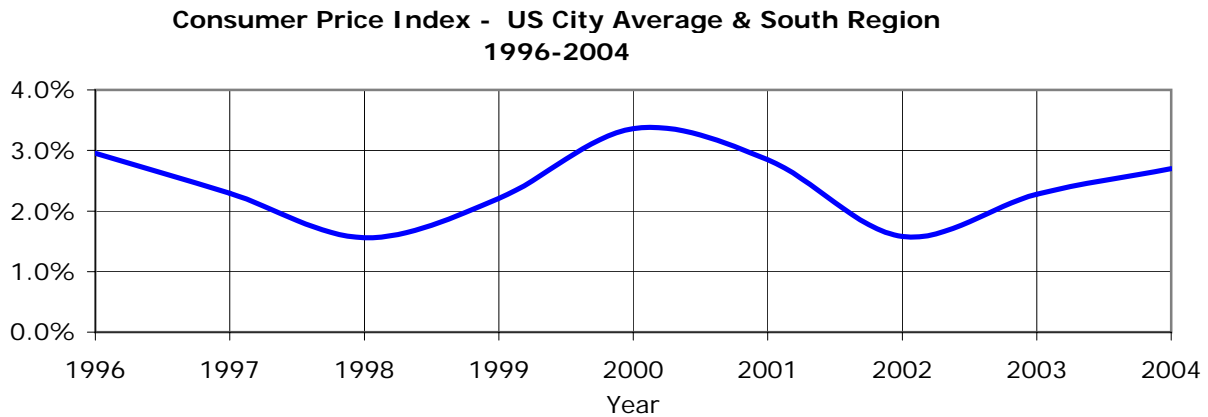
The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 2.7% in 2004, the highest annual increase in three years. Between 2000 and 2004, price levels increased 9.6%.

Figure 3-9
Consumer Price Index for all Urban Consumers (CPI-U, 1996-2004)

	1996	1997	1998	1999	2000	2001	2002	2003	2004
U.S. City Average	156.9	160.5	163.0	166.6	172.2	177.1	179.9	184.0	188.9
% Change from Previous	3.0%	2.3%	1.6%	2.2%	3.4%	2.8%	1.6%	2.3%	2.7%

Source: U.S. Bureau of Labor Statistics

Figure 3-10
Annual Change in the Consumer Price Index (CPI-U, 1996-2004)



Source: U.S. Bureau of Labor Statistics

3.8 Airport Traffic Statistics

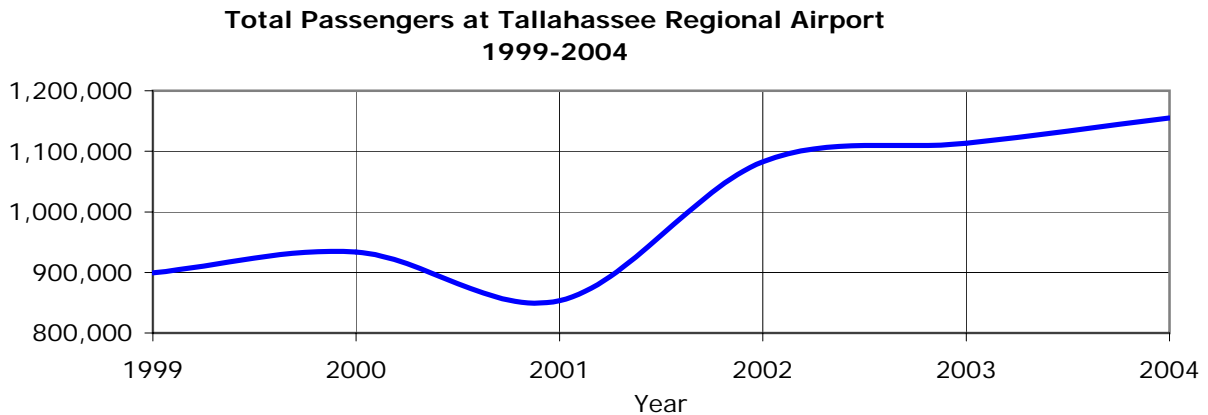
Passenger traffic at Tallahassee Regional Airport reached record levels once again in 2004. The total number of passengers increased 3.8% in 2004, breaking last years' record by more than 40,000 passengers.

**Figure 3-11
Tallahassee Regional Airport Traffic Statistics (1999-2004)**

	1999	2000	2001	2002	2003	2004
Enplanements	450,403	468,703	427,892	543,674	560,885	580,510
Deplanements	449,122	464,897	425,734	538,911	552,358	574,562
Total Passengers	899,525	933,600	853,626	1,082,585	1,113,243	1,155,072

Source: City of Tallahassee, Aviation Department

**Figure 3-12
Total Passengers at Tallahassee Regional (1999-2004)**



Source: City of Tallahassee, Aviation Department

Section 4

Education

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4.1 Higher Education Institutions Enrollment

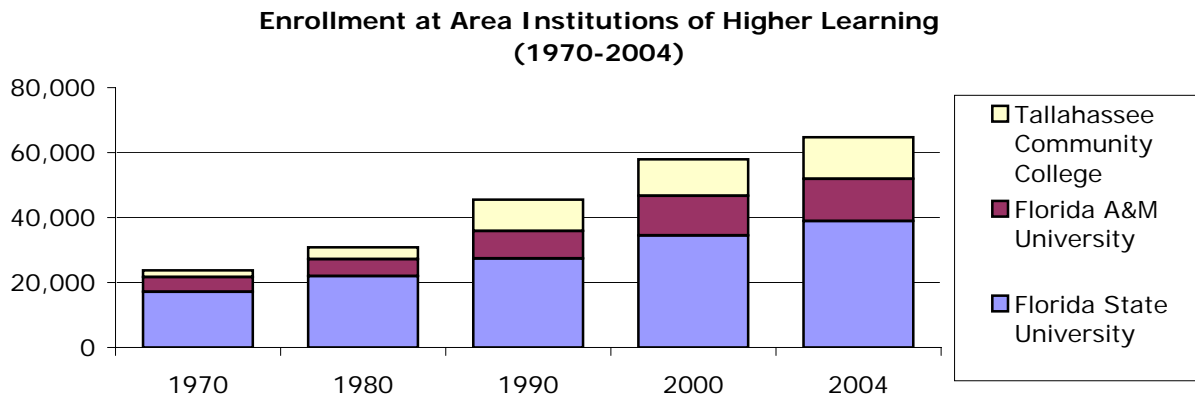
Nearly 65,000 students were enrolled in the fall semester 2004 at the three largest institutions for higher learning in Leon County. Total enrollment at the three schools has more than doubled since 1980.

Figure 4-1
Enrollment at area Institutions of Higher Learning

Year	Florida State University	Florida A&M University	Tallahassee Community College	Total
1960	9,019	2,961	---	11,980
1970	17,188	4,500	2,100	23,788
1980	21,965	5,246	3,663	30,874
1985	21,474	4,919	5,289	31,682
1990	27,427	8,411	9,679	45,517
1995	30,268	10,395	10,101	50,764
2000	34,500	12,202	11,207	57,909
2004	38,886	13,067	12,784	64,737

Source: Florida Department of Education, State of Florida Student Database Reports

Figure 4-2
Enrollment at Area Institutions of Higher Learning (1970-2004)



Source: Florida Department of Education, State of Florida Student Database Reports

4.2 Leon County Public Schools Statistics

Leon County public school enrollment continues to grow (up 33% over the twenty year period 1985-2004). The dropout rate has averaged 3.4% over the most recent four school years compared with 4.3% the preceding four years.

Figure 4-3
Leon County Public School Enrollment, K-12 (1960-2004)

Year	Enrollment
1960	14,959
1970	20,182
1980	21,632
1985	23,445
1990	26,361
1995	29,461
2000	30,958
2001	30,920
2002	30,776
2003	31,037
2004	31,119

Source: Leon County Public Schools

Figure 4-4
Leon County Public School Dropout Statistics, Grades 9-12 (1996-97-2003-04)

Year	Percent Dropout
1996-97	4.5%
1997-98	4.0%
1998-99	5.0%
1999-00	3.8%
2000-01	3.4%
2001-02	3.7%
2002-03	3.0%
2003-04	3.3%

Source: Leon County Public Schools

4.3 Leon County Public School Grades

Seventy-seven percent (up from 70% in 2004) of Leon County Public Schools received an A or B grade compared with 66% for the state.

Figure 4-5
Leon County Public School Grades, K-12 (2001-2005)

School Name	2005 Grade	2004 Grade	2003 Grade	2002 Grade	2001 Grade
Leon High School	B	B	A	A	A
Kate Sullivan Elementary School	A	A	A	A	B
Elizabeth Cobb Middle School	A	A	A	A	A
Frank Hartsfield Elementary School	B	B	A	A	A
James Rickards High School	D	C	C	C	C
Leonard Wesson Elementary School	B	C	C	F	C
Sabal Palm Elementary School	C	C	A	C	C
Caroline Brevard Elementary School	C	C	C	C	C
Lillian Ruediger Elementary School	A	A	A	A	A
Augusta Raa Middle School	A	A	A	A	A
Woodville Elementary School	B	B	B	C	C
Amos P. Godby High School	D	D	C	C	C
Oak Ridge Elementary School	D	C	C	C	C
Second Chance School	F				
Sail	B	B	A	A	A
Griffin Middle School	B	C	A	A	A
John G. Riley Elementary School	C	C	B	D	N
R. Frank Nims Middle School	D	C	C	C	C
Bond Elementary School	C	B	D	D	C
Pineview Elementary School	B	A	B	C	A
Gilchrist Elementary School	A	A	A	A	A
Belle Vue Middle School	C	C	C	C	C
Astoria Park Elementary School	A	A	A	A	B
Walter T. Moore Jr. Elementary School	A	A	A	A	B
Sealey Elementary School	B	A	A	A	B
Apalachee Elementary School	A	B	A	C	C
Fairview Middle School	B	B	B	B	A
Killearn Lakes Elementary School	A	A	A	A	A
Chaires Elementary School	A	A	A	B	C
Springwood Elementary School	A	A	A	A	B
Desoto Trail Elementary School	A	A	A	A	A
Buck Lake Elementary School	A	A	A	A	A
Deerlake Middle School	A	A	A	A	A
Fort Braden Elementary School	B	C	A	C	A
Lincoln High School	B	B	A	A	C
Hawks Rise Elementary School	A	A	A	A	A
Lawton Chiles High School	B	B	A	A	A
Swift Creek Middle School	A	A	A	A	A
Canopy Oaks Elementary School	A	A	A	A	B
Roberts Elementary School	A	A	A	N	

Source: Florida Department of Education

4.4 SAT and ACT Results

Students in the Leon County School District continued to score higher than students statewide and nationally on both the verbal and mathematics ACT subtest mean scores. This trend has been consistent since 1983-84. The Leon County School District has scored higher than the average for districts statewide every year in total ACT mean score and higher than the average for districts nationally four of the past five years.

Figure 4-6
SAT Mean Results, Total (1998-99-2003-04)

	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
Leon County School District	1,048	1,057	1,051	1,052	1,057	1,055
State Of Florida Average	997	998	997	995	996	998
U.S. Average	1,016	1,019	1,020	1,020	1,026	1,026

Note: This report summarizes results for Leon District's graduating seniors of 2003-04 who took the Scholastic Assessment Test-I: Reasoning Tests (SAT-I) at anytime during their high school years (usually as 11th or 12th graders) through March, 2004. The SAT-I assesses verbal and mathematical reasoning skills associated with successful academic performance in college and is reported on a point scale ranging from 200 to 800.

Source: Leon County Public Schools

Figure 4-7
ACT Mean Results, Total (1999-00-2003-04)

	1999-00	2000-01	2001-02	2002-03	2003-04
Leon County School District	21.1	20.8	20.9	21.0	21.1
State Of Florida Average	20.6	20.4	20.4	20.5	20.5
U.S. Average	21.0	21.0	20.8	20.8	20.9

Note: This report summarizes results for Leon District's graduating seniors of 2003-04 who took the American College Testing (ACT) Program assessment during their junior and/or senior years. The ACT assesses skills related to predicting successful academic performance in college and is reported on a scale ranging from 1 to 36.

Source: Leon County Public Schools

Section 5

Community and Environment

Topics

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5.1 History of Tallahassee/Leon County

Leon County, originally part of Escambia County and later a part of Gadsden County, was created by the Territorial Legislature in 1824. Named for Ponce De Leon, Leon County was one of the most populous and prosperous counties in ante-bellum Florida.

Tallahassee, named for the "old fields" that it once encompassed, earned the title early in the 16th century from the Apalachee Indians who inhabited the area. Legend says that the final spelling was chosen by Octavia Walton, daughter of the territorial governor of Florida. Today, Tallahassee exemplifies not only the influence of the Indian, but also that of the Spanish, French and English who occupied the area in succession.

The City of Tallahassee, the county seat and only incorporated city in Leon County, was established in 1825, following a decision by the legislature to locate the capital of the new Florida Territory midway between the population centers of St. Augustine and Pensacola.

The following outline represents a brief historical sketch of the area:

500- 1528 Apalachee Indians flourish in the area, settling into villages and displaying a flair for agriculture, trading and pottery.

1528 An expedition under Panfilo de Narvaez become the first Europeans to come into contact with the local Indians.

1539 The Hernando de Soto expedition winters in an area that is within one mile of the present Capitol building and celebrates the first Christmas in Tallahassee.

1528-1607 Contact with Spanish invaders decimates the Apalachee population through disease and warfare.

1607 Apalachee Indians ask the Spanish Governor to send missionaries into the area.

1633 The Spanish establish a mission chain from St. Augustine to Tallahassee (Fort San Luis).

1704 Spanish missions are destroyed by combined Creek Indians and British forces; Apalachee Indians leave the area.

1725 Creek Indians enter the area from Georgia and Alabama. These and other Indians in the area later become known as Seminoles (runaways).

1763 The Tallahassee area becomes a British possession when Spain cedes Florida to England in exchange for Cuba.

1783 Spain regains possession of Florida.

1818 General Andrew Jackson invades Florida and drives the Seminole Indians from Leon County.

1819 Florida is ceded by Spain to the United States.

1822 The Territory of Florida is created by an act of Congress.

5.1 History of Tallahassee/Leon County

1824 Leon County is created by the Territorial Legislature with Tallahassee as the County seat and State Capital. The first land survey of the area is made. The City of Tallahassee was incorporated the following year.

1834 The Tallahassee-St. Marks railroad is constructed (reported to be the third oldest railroad in the United States).

1845 Florida becomes the 27th State.

1853 The West Florida Seminary is established; it later becomes the Florida State College for Women; today it is the Florida State University.

1861 Florida secedes from the Union.

1865 Federal troops are repelled at the battle of Natural Bridge in southeast Leon County, leaving Tallahassee as the only Confederate capital east of the Mississippi River not captured during the Civil War.

1887 The Florida Agricultural and Mechanical University is established.

1919 The Legislature passes a new city charter for Tallahassee, authorizing a Commission-Manager form of government.

1931 The Lively Vocational Technical School is established.

1966 The Tallahassee Community College is established.

1997 Tallahassee citizens select their first directly-elected Mayor since 1919, replacing the system of yearly rotation among the City Commissioners.

2002 The citizens of Leon County voted to make Leon County a Home Rule Charter County. The charter provides citizens more direct participation in county government.

5.2 Tallahassee's History of Annexations

The City of Tallahassee has had a long history of annexation activity as a means of achieving growth. During its first 150 years, Tallahassee expanded from one-quarter of a mile in size to 28.18 square miles by 1980. The past twenty-five years has witnessed a phenomenal increase in annexation activity with 73 additional square miles having been added during this time, swelling the size of Tallahassee to 102.00 square miles as of December 31, 2004. Many of the annexations in the early 1980's were accomplished through a double-referendum process that required the approval of City voters. Since 1985 the vast majority of the City's annexations have been achieved through a voluntary process where the owners of properties petition for inclusion into the City.

Figure 5-1
Tallahassee's History of Annexations (1927-2004)

Year	Beginning Size (Square Miles)	Area Increase (Square Miles)	Ending Size (Square Miles)
1927 - 1959	2.30	12.18	14.48
1960 - 1979	14.48	13.70	28.18
1980 - 1984	28.18	26.79	54.97
1985 - 1989	54.97	7.25	62.22
1990 - 1994	62.22	19.64	81.86
1995	81.86	1.82	83.68
1996	83.68	10.29	93.97
1997	93.91	2.04	96.01
1998	96.01	0.57	96.58
1999	96.58	1.63	98.21
2000	98.21	0.29	98.50
2001	98.50	2.56	101.06
2002	101.06	0.38	101.44
2003	101.44	0.46	101.90
2004	101.90	0.10	102.00

Source: Tallahassee Leon County Planning Department

5.3 Climate

Tallahassee has a mild, moist climate characteristic of the Gulf States, experiencing a subtropical summer similar to the rest of Florida. In contrast to the Florida peninsula, Northwest Florida of which Tallahassee is a part, experiences four seasons. Prevailing winds average 6.5 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.

Figure 5-2
Climactic Data for the Tallahassee Area

Month	Avg. High Temperature (Fahrenheit)	Avg. Low Temperature (Fahrenheit)	Avg. Days Above 90 degrees (Fahrenheit)	Avg. Days Below 32 degrees (Fahrenheit)	Avg. Number of Days With Rain	Avg. Rainfall (Inches)
January	64	40	0	11	10	4.7
February	67	42	0	8	9	4.9
March	73	48	0	3	9	6.2
April	80	53	1	0	7	4.0
May	86	62	8	0	9	4.6
June	90	69	20	0	12	7.0
July	91	71	23	0	16	8.6
August	91	72	22	0	15	7.0
September	88	68	15	0	9	5.5
October	81	57	2	0	5	3.2
November	72	47	0	4	7	3.5
December	66	41	0	10	8	4.3
Annual	78.7	55.7	91	36	116	63.5

Source: U.S. National Climate Data Center

5.4 Public Safety

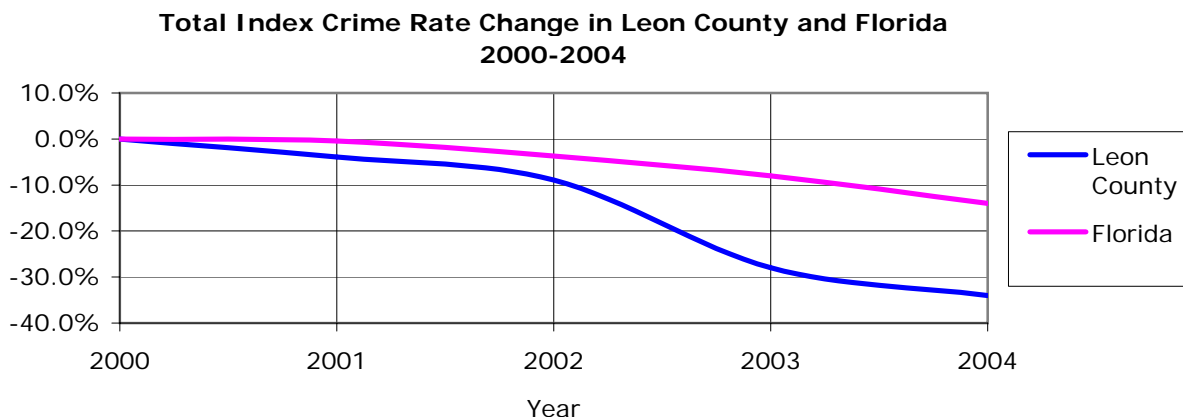
From 2000 to 2004, Leon County experienced a considerable drop in total index crimes (violent crimes and property crimes), down 34% compared with 14% for the state. The index rate for violent crimes in Leon County has dropped 7.7% per year on average since 2000 while property crimes have dropped 8.5% per year on average over the same period.

Figure 5-3
Leon County Crime Rates, Rate per 100,000 Residents (2000-2004)

Type of Crime	2000	2001	2002	2003	2004	Avg. Annual Rate Change (2000-2004)
Violent Crimes	1,054.5	1,006.1	846.2	736.6	756.4	-7.7%
Murder	3.8	2.9	3.6	3.1	4.9	11.2%
Forcible Sex Offenses	103.2	117.5	109.3	108.8	114.4	2.9%
Robbery	219.3	222.4	187.1	158.1	148.2	-9.1%
Aggravated Assault	728.3	663.4	546.3	466.5	488.5	-9.1%
Property Crime	5,913.1	5,687.8	5,516.1	4,871.2	4,112.2	-8.5%
Burglary	1,495.5	1,429.9	1,367.1	1,228.2	1,368.3	-1.9%
Larceny	3,993.7	3,790.6	3,730.1	3,280.2	2,355.9	-11.7%
Auto Theft	423.9	467.2	418.9	362.8	388.0	-1.6%
Index Rate	6,967.6	6,693.9	6,362.3	5,607.8	4,868.6	-8.5%

Source: Florida Statistical Analysis Center, Florida Department of Law Enforcement

Figure 5-4
Total Index Crime Rate Change in Leon County and Florida (2000-2004)



Note: Index Rate is per 100,000 population

Source: Florida Statistical Analysis Center, Florida Department of Law Enforcement

5.5 Local Government

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.

Figure 5-5
Property Tax Rate (2004)

Taxing Authority	Millage Rate	Where Tax is Applied
Leon County		
General Property Tax	8.540	Anywhere in Leon County
County Health MSTU	0.220	Anywhere in Leon County
County EMS MSTU	0.500	Anywhere in Leon County
Leon County School Board		
State Law	5.684	Anywhere in Leon County
Local Board	2.665	Anywhere in Leon County
School Board	0.726	Anywhere in Leon County
City of Tallahassee	3.700	Within City Limits Only
NW Florida Water Mgmt. District	0.050	Anywhere in Leon County
Downtown Improvement Authority	1.000	In the Downtown Area Only
Inside City Limits Total	22.085	
Outside City Limits Total	18.385	
Downtown Improvement Area	23.085	

Source: Leon County Property Appraiser

Section 6

Residential and Commercial Development

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6.1 Residential Development

Residential building permits issued in Leon County continued to post strong numbers in 2004 with the highest level of residential (non mobile home) building permits issued in one year since 1989. The number of detached single-family home permits declined more than 12% while multi-family permits jumped more than 23% in 2004 compared with 2003 levels.

Figure 6-1
Residential Building Permits Issued By Type in Leon County
(1985-2004)

Year	Detached Single- Family	Attached Single- Family	Multi-Family	Constructed Units Permitted	Mobile Homes*	Total Housing Units
1985	992	97	54	1,143	540	1,683
1986	1,271	286	280	1,837	661	2,498
1987	1,366	375	860	2,601	611	3,212
1988	1,439	363	781	2,583	540	3,123
1989	1,743	410	1,261	3,414	658	4,072
1990	1,346	393	1,136	2,875	542	3,417
1991	1,215	152	298	1,665	480	2,145
1992	1,359	284	441	2,084	480	2,564
1993	1,373	269	381	2,023	530	2,553
1994	1,437	188	476	2,101	556	2,657
1995	1,261	302	1,268	2,831	716	3,547
1996	1,256	257	441	1,954	584	2,538
1997	1,109	259	837	2,205	649	2,854
1998	1,012	166	534	1,712	606	2,318
1999	1,245	162	654	2,061	443	2,504
2000	1,154	123	782	2,059	430	2,489
2001	1,127	258	962	2,347	349	2,696
2002	1,436	97	1,375	2,908	259	3,167
2003	1,456	254	1,197	2,907	306	3,213
2004	1,276	191	1,486	2,953	351	3,304

*Prior to 2004, mobile home figures did not include permits issued for mobile home parks

Sources: Leon County Department of Growth and Environmental Management, City of Tallahassee Growth Management Department

6.2 Housing Unit Inventory/Vacancy Rates

There are an estimated 116,493 residential housing units in Leon County as of 2005, two-thirds located within the Tallahassee City Limits and one-third in unincorporated Leon County.

Figure 6-2
Housing Unit Inventory (1970-2030)

Year	Unincorporated Leon		Leon County
	City of Tallahassee	County	
1970	23,236	9,337	32,573
1980	33,677	25,543	59,220
1990	55,221	26,104	81,325
2000	68,417	35,557	103,974
2005	77,945	38,548	116,493
2010	83,804	41,590	125,394
2020	94,569	47,194	141,763
2030	103,926	52,118	156,044

Sources: U.S. Department of Commerce, Bureau of the Census (1970-2000),
Tallahassee-Leon County Planning Department (2005-2030)

Figure 6-3
Residential Vacancy Rates (1970-2000)

Year	Unincorporated Leon		Leon County
	City of Tallahassee	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%

Note: Vacancy rates are as of April 1st of each year for all housing types
Source: U.S. Department of Commerce, Bureau of the Census

6.3 Commercial Development

The value of commercial permits issued in 2004 increased nearly 30% compared to 2003 levels. Two large hotel projects are currently under construction: an 83,971 sq. ft., 132 room Holiday Inn on North Monroe and a 54,525 sq. ft., 85 room Hilton Garden Inn on Blair Stone Road. In 2004 Wal-Mart completed a 134,824 sq. ft. Superstore off Thomasville Road and Target Stores is building a new 135,605 sq. ft. Target Superstore on Bradfordville Road. Three large office projects are under construction: the Frenchtown Renaissance Center at 69,000 sq. ft., a 39,860 sq. ft. office building for Capital Regional Medical Center and a new 30,602 sq. ft. building on Hermitage Blvd.

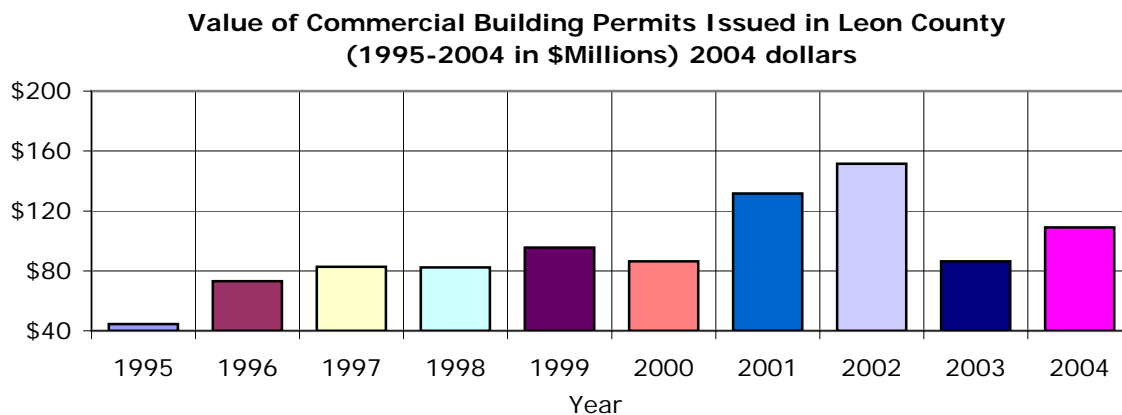
Figure 6-4
Commercial Building Permits Issued in Leon County (1995-2004)

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2004 Dollars (\$Millions)
1995	101	\$35.9	\$44.5
1996	107	\$60.7	\$73.1
1997	115	\$70.2	\$82.7
1998	145	\$71.1	\$82.4
1999	144	\$84.3	\$95.6
2000	119	\$78.7	\$86.3
2001	140	\$123.5	\$131.7
2002	129	\$144.3	\$151.5
2003	104	\$84.1	\$86.3
2004	130	\$108.9	\$108.9

Note: Prior to 1992, mobile home figures did not include permits issued for mobile home parks

Sources: Leon County Department of Growth and Environmental Management, City of Tallahassee Growth Management Department

Figure 6-5
Value of Commercial Building Permits Issued (1995-2004)



Sources: Leon County Department of Growth and Environmental Management, City of Tallahassee Growth Management Department

6.4 Office Market Summary

The overall office vacancy rate in Leon County decreased in 2005 for a second year in a row, down to 9.7% for the county as a whole and a record low 3.1% in the downtown central business district. Vacancy rates continue to remain the highest in the northwest/west (nearly 21%) and this area was the only submarket to not experience a reduction in vacancy rates in the past year.

Figure 6-6
Office Market Survey (First Quarter 2005)

Market	Number of Properties	Square Feet Surveyed	Square Feet Vacant	Percent Vacant	Asking Rents*
Downtown	20	960,736	29,630	3.08%	\$21.00-\$25.00**
Northeast	42	1,304,743	53,932	4.13%	\$14.00-\$22.00
Northwest/West	24	1,490,723	310,941	20.86%	\$12.00-\$17.00
Southeast	30	2,905,469	250,064	8.61%	\$12.00-\$18.50
Total	116	6,661,671	644,567	9.68%	\$12.00-\$25.00

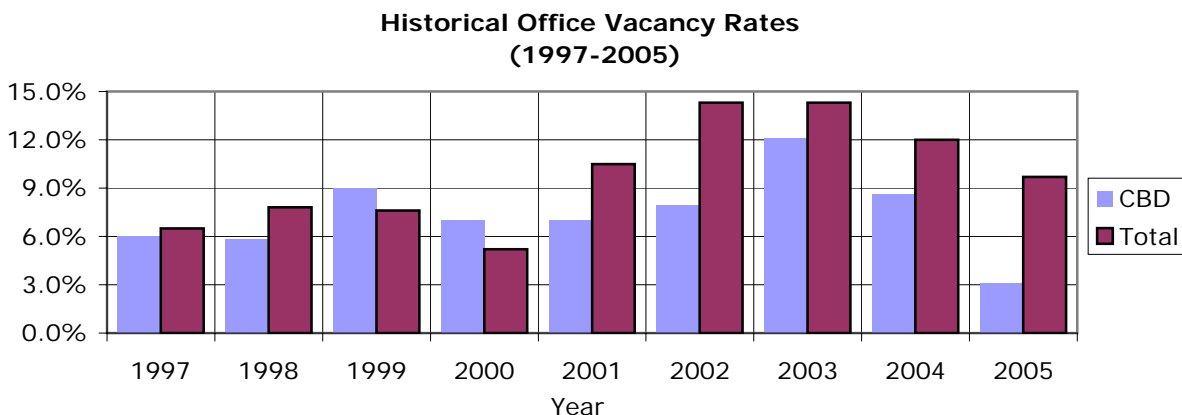
*All rents adjusted to full service (operating expenses include utilities and janitorial)

**Downtown CBD (Central Business District)

Note: Survey consists of buildings 10,000 sq. ft. and larger.

Source: Coldwell Banker Hartung and Noblin, Inc.

Figure 6-7
Historical Office Vacancy Rates (1997-2005)



Source: Coldwell Banker Hartung and Noblin, Inc.

6.5 Retail Market Summary

The Tallahassee retail market consists of approximately seven million square feet of retail space. The northeast suburban market is the largest market by square footage and has the highest average asking lease rates outside of the regional malls. Annual rents increased the most in the south market between 2003 and 2004.

Figure 6-8
Retail Market Survey (2005)

Market	Rentable Area (Sq. Ft.)	Average Asking Lease Rates (Sq. Ft./Year)	Vacancy Rate
Northeast	1,118,311	\$16.33	10.9%
Southeast	1,101,930	\$15.88	7.8%
Central	553,862	\$13.00	3.9%
Northwest	332,088	\$12.10	16.4%
Southwest	369,459	\$14.25	9.3%
South	331,225	\$13.00	12.1%
Regional Malls	2,004,409	\$17.75	3.5%
Total Market	5,811,284	\$14.78	7.4%

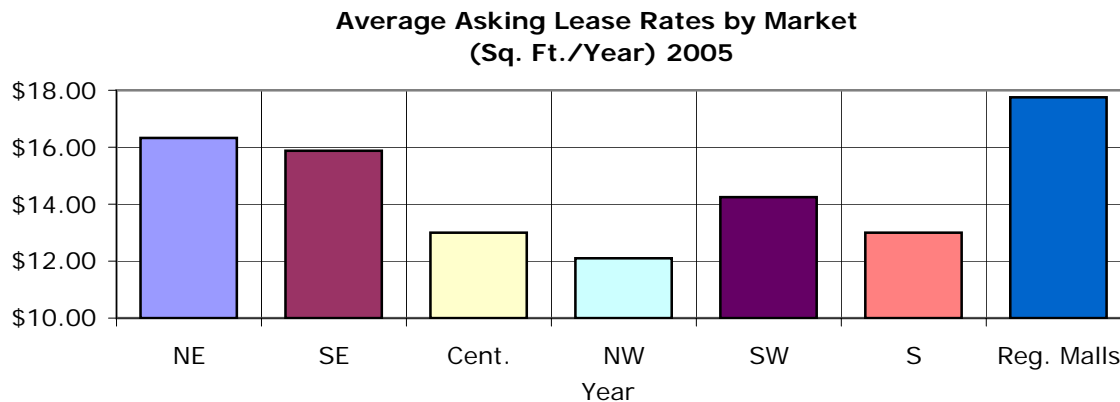
Note: Survey only includes buildings 45,000 sq. ft. and larger.

Note: Survey includes retail shopping centers, town centers, regional malls and big box stores of all classes, whether multi-tenant or single tenant buildings, including owner occupied buildings.

Source: Southland Commercial 2005 Retail Survey, Southland Commercial, December 2004

www.southlandcommercial.com

Figure 6-9
Average Asking Lease Rates by Market (2005)



Source: Southland Commercial 2005 Retail Survey, Southland Commercial, December 2004

www.southlandcommercial.com

6.6 Apartment Market Summary

The apartment vacancy rate in Tallahassee has risen in the past year from 4.4% in September 2003 to 6.1% in September 2004. With nearly 1,600 new units added to the existing supply according to Real Data's 2004 Tallahassee Apartment Market Index, this rise in development activity is the primary reason for increasing vacancy rates.

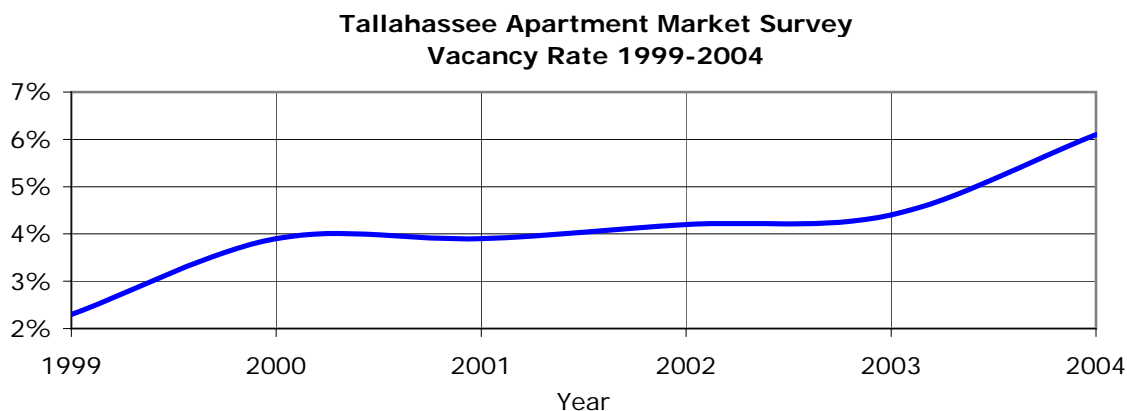
Figure 6-10
Apartment Market Survey (1999-2004)

	Sept. 1999	Sept. 2000	Sept. 2001	Sept. 2002	Sept. 2003	Sept. 2004
Total Units	15,773	15,927	15,775	16,433	17,401	18,206
Vacant Units	363	628	608	695	764	1,102
Vacancy Rate	2.3%	3.9%	3.9%	4.2%	4.4%	6.1%
Avg. Sq. Ft. Range	850-900	850-900	850-900	900-950	950-1,000	950-1,000
Avg. Rent/Month Range	\$550-\$600	\$550-\$600	\$600-\$650	\$700-\$750	\$750-\$800	\$750-\$800

Note: Survey includes communities with 40 or more units, public and Section 8 housing is excluded

Source: Real Data, 2004 Tallahassee Apartment Index, September 2004

Figure 6-11
Apartment Market Vacancy Rate (1999-2004)



Source: Real Data, 2004 Tallahassee Apartment Index, September 2004

6.7 Median Residential Sale Prices

The sales price of a detached single-family home in Leon County increased \$57,690 (44.3%) between the first quarter 2001 and fourth quarter 2004. Since 2003 the median sales price of an existing single-family home in the Tallahassee MSA has been increasing slower than the state average.

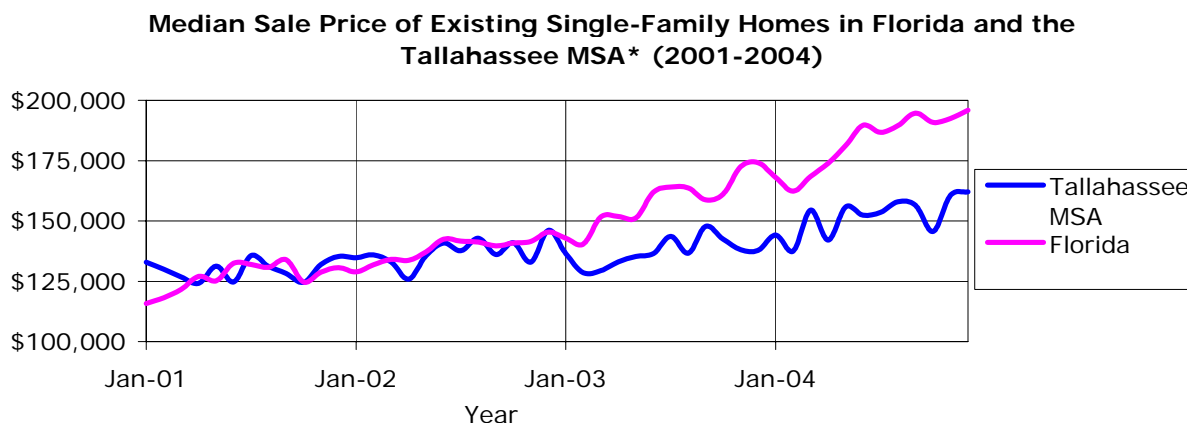
Figure 6.12
Median Residential Sale Prices in Leon County (2001-2004)

Quarter	Detached Single-Family	Condominium	Townhouse	Manufactured/ Mobile Home
2001-1	\$130,100	\$68,950	\$70,250	\$46,900
2001-2	\$129,000	\$69,700	\$72,900	\$47,750
2001-3	\$132,225	\$73,000	\$73,000	\$49,600
2001-4	\$134,450	\$69,950	\$87,500	\$35,000
2002-1	\$135,405	\$74,700	\$78,500	\$48,500
2002-2	\$135,000	\$72,000	\$76,000	\$47,900
2002-3	\$139,000	\$79,700	\$82,300	\$47,500
2002-4	\$142,600	\$71,450	\$85,000	\$42,750
2003-1	\$140,250	\$84,900	\$90,000	\$54,000
2003-2	\$151,950	\$83,500	\$86,700	\$51,900
2003-3	\$164,500	\$106,500	\$90,104	\$57,500
2003-4	\$165,000	\$91,000	\$95,000	\$38,250
2004-1	\$174,661	\$112,400	\$94,800	\$56,000
2004-2	\$176,200	\$114,100	\$100,000	\$60,000
2004-3	\$179,900	\$120,000	\$118,000	\$46,950
2004-4	\$187,790	\$126,995	\$110,000	\$40,075

Note: MLS Closed Sales includes only homes sold in Leon County by a Realtor in MLS

Source: Tallahassee Board of Realtors, Market Trends & Research

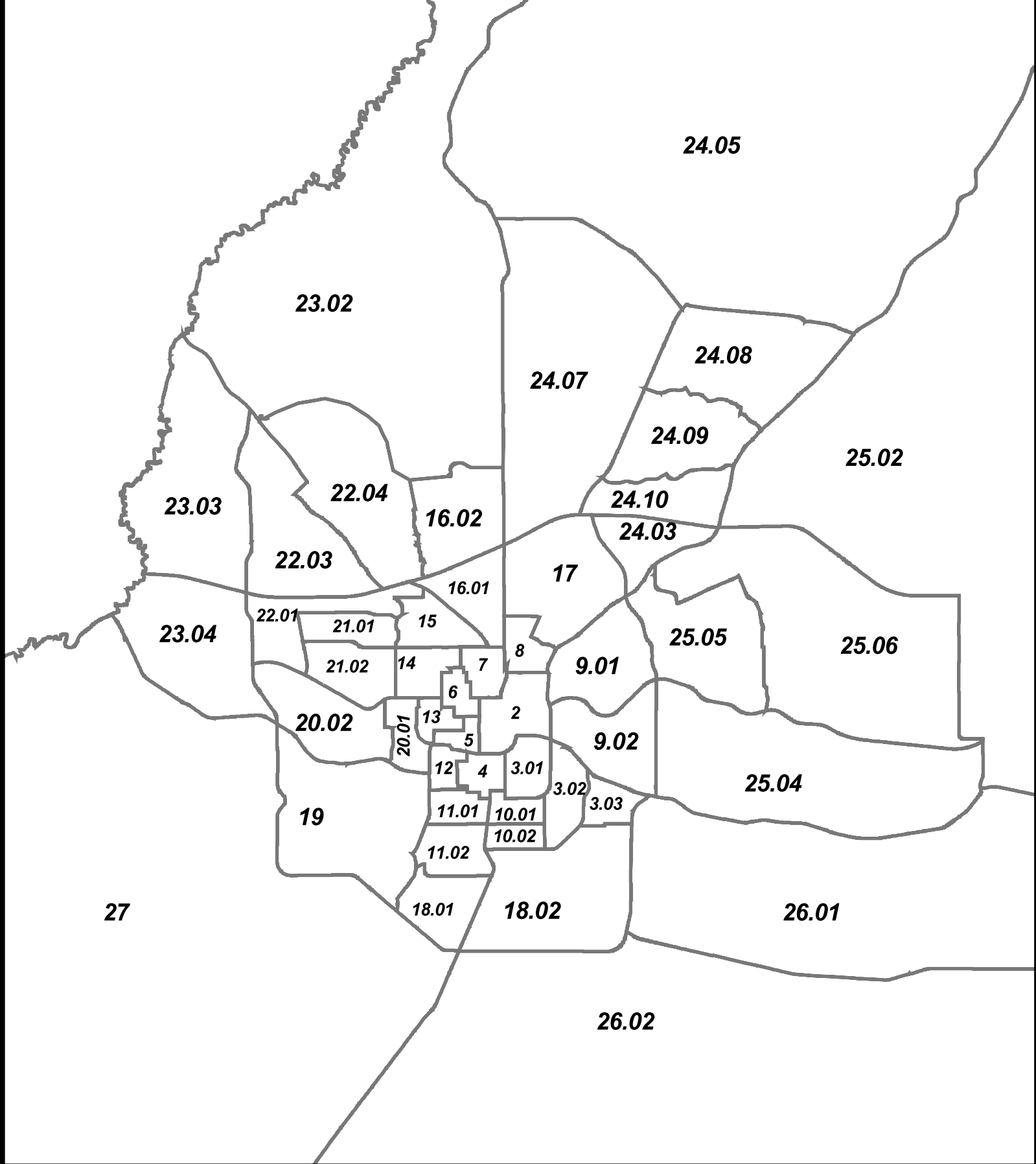
Figure 6-13
Median Sale Price of Existing Single-Family Homes in Florida and the Tallahassee MSA (2001-2004)



Note: MLS Closed Sales includes only homes by a Realtor in MLS

*Tallahassee MSA includes Leon and Gadsden County (2000 Census definition)

Source: Florida Association of Realtors



Leon County Census Tracts Census 2000