

TALLAHASSEE-LEON COUNTY PLANNING DEPARTMENT
2006 Statistical Digest
July 2006

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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, 8,396 in 2004 and 7,215 in 2005.

**Figure 1-1
Population Estimates (1930-2005)**

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
2005	174,781	96,330	271,111

Sources: U.S. Department of Commerce, Bureau of the Census (1930-2000); University of Florida, Bureau of Economic and Business Research (2001-2005 estimates)

**Figure 1-2
Population Projections (2006-2030)**

Year	Tallahassee	Unincorporated	Leon County
2006	178,000	98,200	276,200
2010	190,900	105,600	296,500
2015	206,700	114,500	321,200
2020	220,000	122,200	342,200
2025	231,800	128,900	360,700
2030	242,900	135,200	378,100

Sources: University of Florida, Bureau of Economic and Business Research (2006-2030 projections)
Tallahassee-Leon County Planning Department (Tallahassee 2006-2030 projections assuming continued annexations)

1.2 Population Estimates by Census Tract

By estimated percentage annual growth in population by census tract, CT 26.01 increased more than 11% per year between 2000 and 2005. Eight other census tracts grew 4% or more annually. By estimated total population growth, ten census tracts added more than 1,000 net new residents.

Figure 1-3
Population Estimates by Census Tract, Percent Growth (2000-2005)

Census Tract*	Total Population 2000 Census	Estimated Pop. Growth 2000-2005	Total Pop. 2005 Estimate	Est. Annual Growth by Census Tract 2000-2005
26.01	2,998	2,273	5,271	11.3%
18.02	3,466	1,226	4,692	6.1%
25.04	7,517	2,546	10,063	5.8%
16.01	4,022	1,305	5,327	5.6%
24.07	7,228	2,123	9,351	5.2%
20.02	7,912	1,989	9,901	4.5%
24.05	10,090	2,512	12,602	4.4%
10.02	1,752	419	2,171	4.3%
25.06	6,664	1,577	8,241	4.2%
12	1,030	205	1,235	3.6%
25.05	4,719	917	5,636	3.6%
21.02	7,557	1,416	8,973	3.4%
25.02	9,654	1,529	11,183	2.9%
23.03	3,291	464	3,755	2.6%
21.01	3,847	516	4,363	2.5%
18.01	3,643	470	4,113	2.4%
10.01	2,324	290	2,614	2.4%
15	4,041	502	4,543	2.3%
22.03	7,594	886	8,480	2.2%
23.04	2,494	265	2,759	2.0%
4	2,940	305	3,245	2.0%
13	2,591	261	2,852	1.9%
22.01	5,220	524	5,744	1.9%
27	9,409	920	10,329	1.9%
20.01	7,392	699	8,091	1.8%
24.03	2,737	252	2,989	1.8%
5	4,569	382	4,951	1.6%
16.02	3,064	242	3,306	1.5%
6	2,900	220	3,120	1.5%
14	6,870	518	7,388	1.5%
11.01	2,885	213	3,098	1.4%
17	7,104	495	7,599	1.3%
26.02	7,425	513	7,938	1.3%
9.01	6,849	434	7,283	1.2%
24.10	5,583	326	5,909	1.1%
23.02	3,409	176	3,585	1.0%
19	7,070	352	7,422	1.0%
3.03	3,275	154	3,429	0.9%
24.08	7,600	299	7,899	0.8%
22.04	7,172	273	7,445	0.7%
11.02	2,070	78	2,148	0.7%
24.09	8,573	262	8,835	0.6%
9.02	8,261	198	8,459	0.5%
8	2,937	51	2,988	0.3%
2	3,811	39	3,850	0.2%
7	1,968	17	1,985	0.2%
3.02	2,399	19	2,418	0.2%
3.01	1,526	7	1,533	0.1%

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 percentage in the state behind Alachua County). At 8.2%, Leon County has the second smallest percentage of population aged 65 and older in the state. The 55-64 year old age group has increased by nearly three times the County average annual percentage population growth rate of 2.5% between 2000 and 2005 while the 80+ age group increased at a rate nearly twice that of the average annual percentage growth rate for Leon County.

Figure 1-4
Leon County Population by Age and Gender (2005 Estimate)

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	15,097	5.6%	7,420	2.7%	7,677	2.8%
5 to 17	39,983	14.7%	19,526	7.2%	20,457	7.5%
18 to 34	100,441	37.0%	52,662	19.4%	47,779	17.6%
35 to 54	69,703	25.7%	36,738	13.6%	32,965	12.2%
55 to 64	23,562	8.7%	12,214	4.5%	11,348	4.2%
65 to 79	15,747	5.8%	8,728	3.2%	7,019	2.6%
80+	6,578	2.4%	4,342	1.6%	2,236	0.8%
Total	271,111		141,630	52.2%	129,481	47.8%

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 145", June 2006

Figure 1-5
Leon County Population Growth by Age Group (2000-2005)

Age Group	2000 Population	2005 Population	Growth in Population 2000-2005	Percent Growth 2000-2005	Avg. Ann. Growth 2000-2005
0 to 4	13,727	15,097	1,370	9.5%	1.9%
5 to 17	37,280	39,983	2,703	7.0%	1.4%
18 to 34	86,609	100,441	13,832	14.8%	3.0%
35 to 54	65,284	69,703	4,419	6.5%	1.3%
55 to 64	16,661	23,562	6,901	34.7%	6.9%
65 to 79	14,600	15,747	1,147	7.6%	1.5%
80+	5,291	6,578	1,287	21.8%	4.4%
Total	239,452	271,111	31,659	12.4%	2.5%

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 145", June 2006

1.4 Race and Ethnicity

By race and ethnicity, Leon County's population includes 61.2% non-hispanic white, 32.0% non-hispanic black, 4.0% of hispanic origin and 2.8% of "other" races and ethnicities.

Figure 1-6
Leon County Population by Age, Race and Ethnicity (2005 Estimate)

Age Group	All Races	Non-Hispanic White	Non-Hispanic Black	Other	Hispanic Origin
0 to 4	15,097	8,040	5,995	522	540
5 to 17	39,983	21,234	15,876	1,385	1,488
18 to 34	100,441	54,879	36,294	3,160	6,108
35 to 54	69,703	46,577	19,301	1,682	2,143
55 to 64	23,562	17,978	4,771	416	397
65 to 79	15,747	11,930	3,307	288	222
80+	6,578	5,312	1,103	95	68
Total	271,111	165,950	86,647	7,548	10,966

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 145", June 2006

Figure 1-7
Leon County Pop. by Percentage, Race & Ethnicity (2005 Estimate)

Age Group	Non-Hispanic White	Non-Hispanic Black	Other	Hispanic Origin
0 to 4	53.3%	39.7%	3.5%	3.6%
5 to 17	53.1%	39.7%	3.5%	3.7%
18 to 34	54.6%	36.1%	3.1%	6.1%
35 to 54	66.8%	27.7%	2.4%	3.1%
55 to 64	76.3%	20.2%	1.8%	1.7%
65 to 79	75.8%	21.0%	1.8%	1.4%
80+	80.8%	16.8%	1.4%	1.0%
Total	61.2%	32.0%	2.8%	4.0%

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 145", June 2006

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 76.4% since 2000 compared with 67.1% between 1990 and 2000.

Figure 1-8
Components of Population Change (2000-2005)

	Leon County	State of Florida
Total Population Change (2000-2005)	31,659	1,935,403
Net Natural Increase	7,475	211,153
Net Migration	24,184	1,724,250
Percent due to Natural Increase	23.6%	10.9%
Percent due to Net Migration	76.4%	89.1%

Source: University of Florida, Bureau of Economic and Business Research, "Florida Estimates of Population, 2005"

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 359,924 in 2005, up 11.7% from 2000.

Figure 1-10
Population Growth in Florida Metropolitan Areas (2000-2005)

Metropolitan Area/County(ies)	2005 Population Estimate	2000 Census Population	Percent Growth 2000- 2005
Miami-Fort Lauderdale-Miami Beach (<i>Broward, Miami-Dade, Palm Beach</i>)	5,428,962	5,007,988	8.1%
Tampa-St. Petersburg-Clearwater (<i>Hernando, Hillsborough, Pasco, Pinellas</i>)	2,636,972	2,396,013	9.6%
Orlando-Kissimmee (<i>Lake, Orange, Osceola, Seminole</i>)	1,953,354	1,644,563	17.2%
Jacksonville (<i>Baker, Clay, Duval, Nassau, St. Johns</i>)	1,277,763	1,122,750	12.9%
Sarasota-Bradenton-Venice (<i>Manatee, Sarasota</i>)	672,231	589,963	13.1%
Cape Coral-Fort Myers (<i>Lee</i>)	549,442	440,888	22.0%
Lakeland (<i>Polk</i>)	541,840	483,924	11.3%
Palm Bay-Melbourne-Titusville (<i>Brevard</i>)	531,970	476,230	11.1%
Deltona-Daytona Beach-Ormond Beach (<i>Volusia</i>)	494,649	443,343	11.0%
Pensacola-Ferry Pass-Brent (<i>Escambia, Santa Rosa</i>)	440,066	412,153	6.6%
Port St. Lucie-Fort Pierce (<i>Martin, St. Lucie</i>)	381,098	319,426	17.7%
Tallahassee (<i>Gadsden, Jefferson, Leon, Wakulla</i>)	359,924	320,304	11.7%
Naples-Marco Island (<i>Collier</i>)	317,788	251,377	23.4%
Ocala (<i>Marion</i>)	304,926	258,916	16.4%
Gainesville (<i>Alachua, Gilchrist</i>)	256,985	232,392	10.1%
Fort Walton Beach-Crestview-Destin (<i>Okaloosa</i>)	188,939	170,498	10.3%
Panama City-Lynn Haven (<i>Bay</i>)	161,721	148,217	8.7%
Punta Gorda (<i>Charlotte</i>)	154,030	141,627	8.4%
Sebastian-Vero Beach (<i>Indian River</i>)	130,043	112,947	14.1%

Sources: Executive Office of the President, Office of Management and Budget; 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 2005)

	Estimate April 1, 2005		Census April 1, 2000		Census April 1, 1990	
	Households	Average Household Size	Households	Average Household Size	Households	Average Household Size
Leon County	109,700	2.33	96,521	2.34	74,828	2.43
Florida	7,109,208	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 143", January 2006

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 three years (2003-2005) 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. The preliminary 2005 annual averages indicate a slight up tick in the labor force and employment rates in the City of Tallahassee and a decrease in Unincorporated Leon County. Local Area Unemployment Statistics are a count of people employed by place of residence (not place of employment).

**Figure 2-1
Labor Force (2000-2005)**

	2000	2001	2002	2003	2004	2005
Leon County	134,833	133,807	132,951	134,104	133,797	135,205
% Change From Previous		-0.8%	-0.6%	0.9%	-0.2%	1.1%
City of Tallahassee	83,161	82,608	82,225	82,888	82,645	85,078
% Change From Previous		-0.7%	-0.5%	0.8%	-0.3%	2.9%
Unincorporated Leon County	51,672	51,199	50,726	51,216	51,152	50,127
% Change From Previous		-0.9%	-0.9%	1.0%	-0.1%	-2.0%

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

**Figure 2-2
Employment (2000-2005)**

	2000	2001	2002	2003	2004	2005
Leon County	130,726	129,075	127,060	128,569	128,714	130,805
% Change From Previous		-1.3%	-1.6%	1.2%	0.1%	1.6%
City of Tallahassee	80,144	79,131	77,896	78,821	78,910	82,264
% Change From Previous		-1.3%	-1.6%	1.2%	0.1%	4.3%
Unincorporated Leon County	50,582	49,944	49,164	49,748	49,804	48,541
% Change From Previous		-1.3%	-1.6%	1.2%	0.1%	-2.5%

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

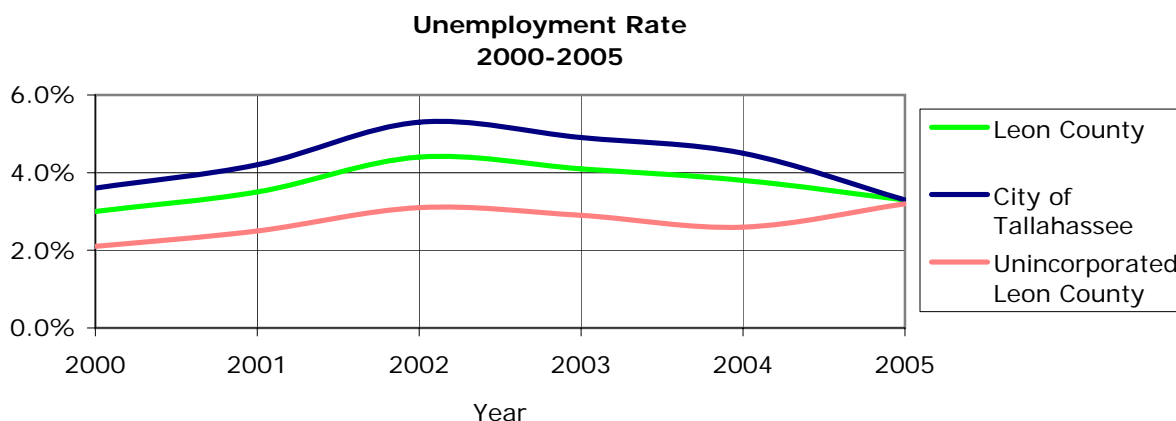
2.2 Unemployment

The unemployment rate in Leon County and the City of Tallahassee has declined for three straight years. These place of residence figures indicate a slight increase in unemployment in 2005 for residents of unincorporated Leon County. Initial claims for unemployment compensation dropped 5.1% in 2005 in Leon County after increasing 11.0% the previous year.

**Figure 2-3
Unemployment Rate (2000-2005)**

	2000	2001	2002	2003	2004	2005
Leon County	3.0%	3.5%	4.4%	4.1%	3.8%	3.3%
City of Tallahassee	3.6%	4.2%	5.3%	4.9%	4.5%	3.3%
Unincorporated Leon County	2.1%	2.5%	3.1%	2.9%	2.6%	3.2%

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 (2000-2005)**

	2000	2001	2002	2003	2004	2005
Leon County	3,954	5,022	5,999	5,633	6,250	5,932
% Change from Previous		27.0%	19.5%	-6.1%	11.0%	-5.1%
Florida	391,411	547,418	585,764	557,845	658,516	542,845
% Change from Previous		39.9%	7.0%	-4.8%	18.0%	-17.6%

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

2.3 Employment by Industry

Between 2000 and 2005, non-agricultural employment in the Tallahassee MSA has grown 0.7% per year on average. Natural resources, mining and construction industries grew 5.1% per year followed closely by leisure and hospitality, up an average of 5.0% per year. Manufacturing and information industries have suffered the greatest job losses, down 3.9% and 2.7% per year respectively.

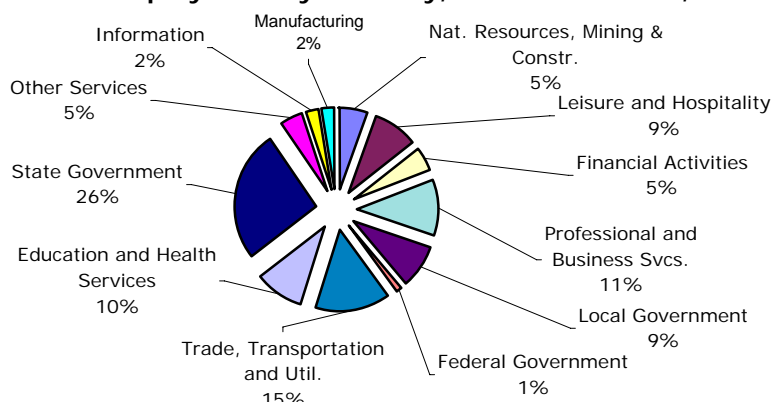
**Figure 2-5
Non-Agricultural Employment by Industry,
Tallahassee MSA (2000-2005)**

	2000	2001	2002	2003	2004	2005	Avg. Annual Change
Nat. Resources, Mining & Constr	7,300	6,900	7,200	7,700	8,200	9,400	5.1%
Leisure and Hospitality	12,100	13,000	13,400	13,600	14,300	15,500	5.0%
Financial Activities	7,000	6,900	7,500	7,700	7,700	7,900	2.4%
Professional and Business Svcs.	17,600	18,700	18,200	18,200	18,000	19,100	1.6%
Local Government	14,600	14,700	14,700	14,900	15,200	15,300	0.9%
Federal Government	2,000	1,900	1,900	2,000	2,000	1,900	-1.0%
Trade, Transportation and Util.	25,400	24,100	23,400	23,500	24,300	25,300	-0.1%
Education and Health Services	16,800	16,800	16,500	16,700	16,400	16,600	-0.2%
State Government	45,600	45,600	45,400	45,700	46,000	44,800	-0.4%
Other Services	8,200	8,100	8,100	7,800	8,000	8,000	-0.5%
Information	4,800	4,600	4,000	3,800	4,000	4,200	-2.7%
Manufacturing	5,100	4,400	4,200	4,100	4,200	4,200	-3.9%
Total	166,600	165,900	164,400	165,700	168,100	172,100	0.6%

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

**Figure 2-6
Non-Agricultural Employment by Industry,
Tallahassee MSA (2005)**

Non-Agricultural Employment by Industry, Tallahassee MSA, 2005



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

2.4 Projected Employment by Industry

In terms of both total employment growth and percentage of annual change projected by industry between 2005 and 2013 in Leon County, two industries top the list in both categories: education and health services and professional and business services.

Figure 2-7
Projected Employment by Industry (2005-2013)

Industry	2005 Employment	2013 Employment	Total Employment Annual Change	Percentage Annual Change
Total All Industries	163,891	187,526	2,954	1.7%
Education and Health Services	15,919	19,927	501	2.8%
Professional and Business Services	16,528	20,513	498	2.7%
Construction	7,006	8,613	201	2.6%
Transportation and Warehousing	1,400	1,695	37	2.4%
Leisure and Hospitality	13,710	16,389	335	2.2%
Local Government	12,064	13,901	230	1.8%
Other Services (Except Government)	7,703	8,863	145	1.8%
Financial Activities	7,376	8,389	127	1.6%
Agriculture, Forestry, Fishing and Hunting	184	208	3	1.5%
Retail Trade	17,189	19,223	254	1.4%
Information	3,794	4,191	50	1.2%
State Government	42,456	46,313	482	1.1%
Federal Government	1,739	1,891	19	1.0%
Manufacturing	2,199	2,393	24	1.1%
Wholesale Trade	2,707	2,879	22	0.8%
Self-Employed & Unpaid Family Workers	11,810	12,026	27	0.2%

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

2.5 Projected Employment by Occupation

In terms of the projected percentage annual growth by occupation in Leon County, the top four occupations are either in the technology or medical field. By total employment change, retail occupations (food preparation, cashiers, waiters/waitresses and salespersons) account for four of the top five occupations projected to add the most jobs by 2013.

Figure 2-8
Fastest Growing Occupations (2005-2013)

Industry	Percentage			
	2005 Emp.	2013 Emp.	Total Emp. Change	Annual Change
Computer Software Engineers, Systems Software	199	289	90	4.7%
Medical Assistants	496	699	203	4.3%
Computer Software Engineers, Applications	412	573	161	4.1%
Medical Records and Health Information Technicians	211	289	78	3.9%
Mental Health Counselors	170	232	62	3.9%
Welders, Cutters, Solderers and Brazers	205	279	74	3.9%
Residential Advisors	117	159	42	3.8%
Self-Enrichment Education Teachers	291	394	103	3.8%
Dental Assistants	221	298	77	3.7%
Dental Hygienists	150	201	51	3.7%
Cement Masons and Concrete Finishers	152	201	49	3.5%
Pharmacy Technicians	284	373	89	3.4%

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

Figure 2-9
Occupations Gaining the Most New Jobs (2005-2013)

Industry	Percentage			
	2005 Emp.	2013 Emp.	Total Emp. Change	Annual Change
Food Preparation & Serving Workers, Inc. Fast Food	3,098	3,907	809	2.9%
Registered Nurses	2,325	2,916	591	2.8%
Cashiers	3,917	4,505	588	1.7%
Waiters and Waitresses	2,884	3,469	585	2.3%
Retail Salespersons	5,177	5,698	521	1.2%
Lawyers	2,873	3,385	512	2.0%
Janitors & Cleaners, Except Maids & Housekeeping	3,177	3,685	508	1.9%
Customer Service Representatives	2,470	2,919	449	2.1%
Network Systems and Data Communications Analyst	1,283	1,685	402	3.4%
Nursing Aides, Orderlies, and Attendants	1,674	2,044	370	2.5%
Office Clerks, General	4,284	4,646	362	1.0%
Management Analysts	6,084	6,442	358	0.7%

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

2.6 Median Family Income

The median family income in Leon County stood at \$52,962 according to the 2000 Census and is estimated to be \$58,500 in the 2006 fiscal year 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 2-10
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	6.7%	3.6%
Tallahassee MSA*	\$18,448	\$34,475	\$50,086	6.3%	3.7%
City of Tallahassee	\$16,982	\$34,764	\$49,359	7.2%	3.5%
Unincorporated Leon County	\$20,697	\$40,057	\$57,232	6.6%	3.6%
Florida	\$17,280	\$32,212	\$45,625	6.2%	3.5%

*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 2-11
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	2.1%	0.8%
Tallahassee MSA*	\$38,553	\$45,422	\$50,086	1.6%	1.0%
City of Tallahassee	\$35,504	\$45,803	\$49,359	2.5%	0.7%
Unincorporated Leon County	\$43,270	\$52,776	\$57,232	2.0%	0.8%
Florida	\$36,127	\$42,440	\$45,625	1.6%	0.7%

*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 Estimates by Fiscal Year (2002-2006)

Median Family Income	2002	2003	2004	2005	2006
Tallahassee*	\$57,200	\$54,500	\$56,500	\$57,700	\$58,500
Florida	\$51,800	\$50,200	\$51,900	\$52,550	\$54,800

*Note: Tallahassee for this report for the years 2002 - 2005 is defined as Leon and Gadsden Counties. For 2006 the median family income estimates for Tallahassee include Leon, Gadsden and Jefferson Counties

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

2.7 Average Annual Employment/Wages

The average annual wage in Leon County in 2004 was \$33,742, 4.0% below the state average wage of \$35,159. The annual average state government wage was 4.1% higher in Leon County compared to the state average while the local government wage was 6.7% lower than the state average.

Figure 2-13
Average Annual Employment and Wages by Ownership (2004)

	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
All Ownerships	7,450	144,117	\$33,742
Private Ownerships	7,188	88,301	\$31,642
Federal Government	42	1,698	\$58,160
State Government	196	42,390	\$36,662
Local Government	24	11,728	\$35,464
Florida			
All Ownerships	531,583	7,467,090	\$35,159
Private Ownerships	526,110	6,426,345	\$34,427
Federal Government	1,122	126,773	\$56,138
State Government	3,007	204,876	\$35,224
Local Government	1,344	709,095	\$38,020

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

Figure 2-14
Average Annual Employment & Wages, Select Private Industries (2004)

	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
Professional and Business Services	1,755	14,836	\$43,988
Financial Activities	826	6,791	\$45,499
Construction	781	6,487	\$32,547
Information	161	3,587	\$39,662
Manufacturing	125	2,221	\$36,001
Florida			
Professional and Business Services	110,292	1,298,027	\$36,692
Financial Activities	60,088	502,288	\$49,553
Construction	60,798	494,038	\$36,660
Information	9,467	167,463	\$50,903
Manufacturing	16,554	389,060	\$42,463

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

2.8 Occupational Employment and Wages

The 2006 estimated average hourly wage for all occupations in the Tallahassee MSA is \$17.56. The area median wage is \$13.82, with the entry wage of \$8.17 and \$22.24 per hour for experienced workers in their occupation.

Figure 2-15
Occupational Emp. and Wages, 1,000+ Employment,
Tallahassee MSA (2006)

Occupational Title	2005 Emp.	Hourly Wage (2006 Wage Estimates in dollars)			
		Mean	Median	Entry*	Exp.**
Total All Occupations	163,810	\$17.56	\$13.82	\$8.17	\$22.24
Retail Salespersons	5,510	\$11.10	\$9.04	\$7.11	\$13.10
Cashiers	4,610	\$7.82	\$7.39	\$6.66	\$8.41
Executive Secretaries and Administrative Assistants	4,160	\$16.42	\$15.78	\$12.29	\$18.49
Office Clerks, General	4,000	\$10.54	\$10.15	\$7.68	\$11.96
Management Analysts	3,680	\$24.89	\$22.40	\$17.63	\$28.52
Business Operations Specialists, All Other	3,650	\$23.02	\$21.35	\$16.16	\$26.44
Comb. Food Pre. & Serving Workers, Inc. Fast Food	3,520	\$7.31	\$6.82	\$6.62	\$7.66
Waiters and Waitresses	3,210	\$7.53	\$6.88	\$6.62	\$7.99
Accountants and Auditors	3,030	\$21.48	\$19.04	\$13.76	\$25.33
Janitors and Cleaners, Ex.Maids and Hskping.	2,930	\$9.02	\$8.71	\$7.54	\$9.77
Secretaries, Except Legal, Medical, and Executive	2,570	\$12.54	\$12.13	\$9.20	\$14.22
Bookkeeping, Accounting, and Auditing Clerks	2,470	\$13.50	\$13.21	\$9.65	\$15.44
Registered Nurses	2,270	\$27.44	\$24.67	\$19.06	\$31.64
Stock Clerks and Order Fillers	2,100	\$9.64	\$8.96	\$7.27	\$10.83
Customer Service Representatives	1,940	\$14.20	\$14.12	\$10.23	\$16.18
Lawyers	1,830	\$45.65	\$37.31	\$26.09	\$55.43
Nursing Aides, Orderlies, and Attendants	1,600	\$9.19	\$9.03	\$7.65	\$9.95
Correctional Officers & Jailers	1,410	\$15.32	\$15.26	\$11.79	\$17.09
Receptionists and Information Clerks	1,400	\$10.47	\$10.27	\$7.83	\$11.78
First-Line Supers./Mgrs. of Ofc. & Admin. Sup. Wkrs	1,310	\$21.45	\$20.24	\$14.21	\$25.07
General and Operations Managers	1,260	\$49.57	\$44.04	\$26.63	\$61.04
Truck Drivers, Heavy and Tractor-Trailer	1,200	\$13.10	\$11.97	\$9.69	\$14.80
Laborers & Freight, Stock, & Material Movers, Hand	1,160	\$9.10	\$8.73	\$7.31	\$9.99
Landscaping and Groundskeeping Workers	1,150	\$10.31	\$10.11	\$7.76	\$11.58
Food Preparation Workers	1,140	\$7.75	\$7.12	\$6.63	\$8.31
Comp. Ofcrs., Ex. Ag., Cons., Hlth., Safety & Trans.	1,140	\$16.40	\$15.25	\$12.44	\$18.37
Sales Reps., Whlsle. & Mfg., Exc. Tech. & Scientific	1,130	\$24.22	\$19.01	\$11.02	\$30.82
Security Guards	1,100	\$10.62	\$9.91	\$7.56	\$12.16
Maintenance and Repair Workers, General	1,100	\$12.84	\$12.28	\$9.14	\$14.69
Carpenters	1,080	\$14.13	\$12.81	\$10.99	\$15.71
Computer Systems Analysts	1,080	\$22.79	\$21.50	\$16.98	\$25.69
First-Line Supervisors/Mgrs of Retail Sales Workers	1,060	\$19.01	\$16.29	\$11.99	\$22.52
Licensed Practical and Licensed Vocational Nurses	1,040	\$16.41	\$16.31	\$13.91	\$17.67

* *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.

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Occ. Employment Statistics & Wages

2.9 Per Capita Income

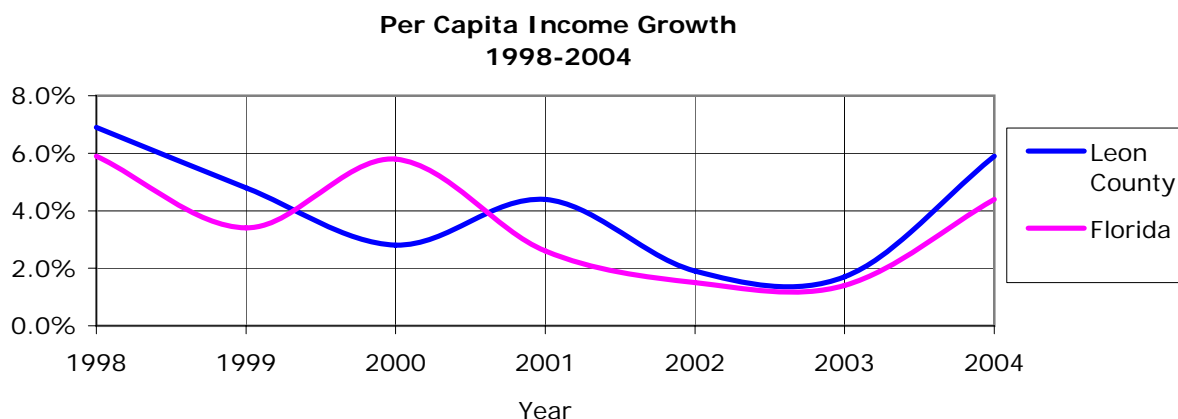
Per capita income grew 5.9% in Leon County in 2004 (up from 1.7% the previous year) and was 95.2% of the per capita income for the state. Per capita income tends to be lower in Leon County due to the large number of college students in our community.

Figure 2-16
Per Capita Income (1998-2004)

	1998	1999	2000	2001	2002	2003	2004
Leon County	\$24,153	\$25,345	\$26,068	\$27,248	\$27,783	\$28,252	\$29,959
% Change From Previous	6.9%	4.8%	2.8%	4.4%	1.9%	1.7%	5.9%
Florida	\$25,987	\$26,894	\$28,509	\$29,273	\$29,709	\$30,128	\$31,469
% Change From Previous	5.9%	3.4%	5.8%	2.6%	1.5%	1.4%	4.4%

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

Figure 2-17
Per Capita Income Growth (1998-2004)



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

2.10 Effective Buying Income

The median household EBI in Leon County in 2005 was \$36,312, 4.0% below the statewide median household EBI.

Figure 2-18
Effective Buying Income (2005)

	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	21.3%	16.7%	34.8%	\$36,312
City of Tallahassee	22.8%	15.3%	27.3%	\$29,943
Florida	23.9%	18.8%	35.0%	\$37,840

**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, 2005 Survey of Buying Power

Section 3

Economic Factors

Topics

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3.1 Taxable Sales

The overall level of taxable sales was up 7.7% in the Tallahassee MSA in 2005 following a strong 5.8% growth in 2004. The leading growth categories in 2005 were: building investment (building, HVAC contractors, etc.) up 18.2% in 2005, autos and accessories (new and used cars, repair shops, etc.) up 8.8% and business investment (industrial machinery, medical/optical supplies, commercial rentals, etc.) up 8.4% in 2005.

Figure 3-1
Annual Taxable Sales, Tallahassee MSA and Florida (1995-2005)

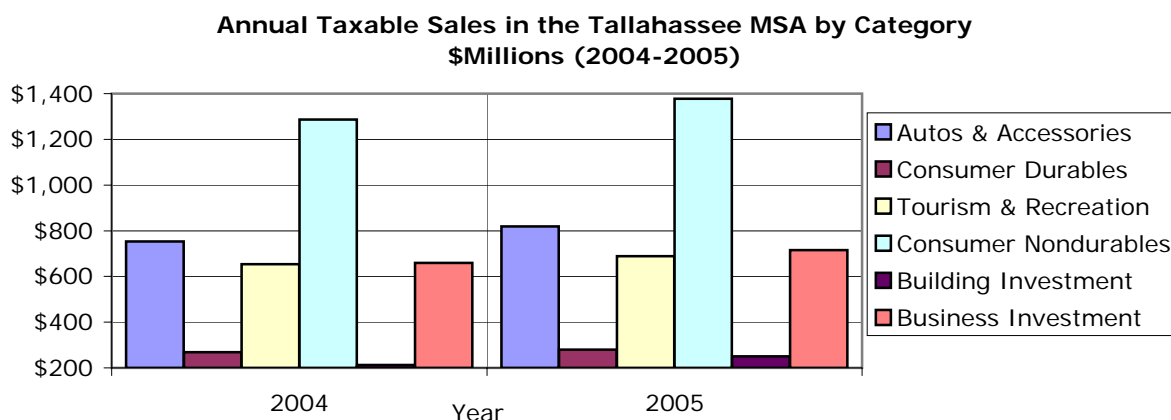
Year	Tallahassee MSA	Change from Previous Year	State of Florida	Change from Previous Year
1995	\$2,637.7	6.5%	\$177,449.8	6.0%
1996	\$2,797.5	6.1%	\$191,026.0	7.7%
1997	\$2,865.5	2.4%	\$203,026.7	6.3%
1998	\$2,981.8	4.1%	\$217,206.9	7.0%
1999	\$3,217.3	7.9%	\$236,422.9	8.8%
2000	\$3,335.4	3.7%	\$252,179.8	6.7%
2001	\$3,362.3	0.8%	\$255,204.7	1.2%
2002	\$3,419.2	1.7%	\$252,910.9	-0.9%
2003	\$3,623.8	6.0%	\$266,335.7	5.3%
2004	\$3,834.4	5.8%	\$294,110.3	10.4%
2005	\$4,130.8	7.7%	\$327,787.6	11.5%

Note: Taxable sales in \$Millions 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 (2004-2005)



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 63.2% of retail sales within the Tallahassee trade in the 2004 Survey, up from 62.8% in 2004. 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 (2005)

County	Major City	Population	Retail Sales (Millions)	Per Capita Retail Sales
Calhoun	Blountstown	13,300	\$94.3	\$7,090
Franklin	Apalachicola	10,400	\$134.4	\$12,923
Gadsden	Quincy	45,900	\$275.8	\$6,010
Jefferson	Monticello	14,100	\$81.6	\$5,786
Leon	Tallahassee	253,600	\$3,680.4	\$14,513
Liberty	Bristol	7,400	\$13.2	\$1,784
Madison	Madison	19,000	\$110.5	\$5,816
Taylor	Perry	20,400	\$139.5	\$6,840
Wakulla	Crawfordville	26,700	\$110.6	\$4,141
Total Florida Counties		410,800	\$4,640.3	\$11,296
Brooks	Quitman	16,200	\$54.1	\$3,341
Decatur	Bainbridge	28,400	\$332.1	\$11,693
Grady	Cairo	24,500	\$193.0	\$7,876
Thomas	Thomasville	44,300	\$603.3	\$13,619
Total Georgia Counties		113,400	\$1,182.5	\$10,428
Total Trade Area		524,200	\$5,822.8	\$11,108
Trade Area Exc. Leon County		270,600	\$2,142.4	\$7,917

Source: Sales and Marketing Management, 2005 Survey of Buying Power, September 2005

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 (1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Person Visits	1,851	1,940	2,133	2,433	2,203	2,352	2,571	2,784	2,751

Note: Data in Thousands

Source: Leon County Tourist Development Council

Annual Visitor Trends (Person Visits in Thousands)
1997-2005

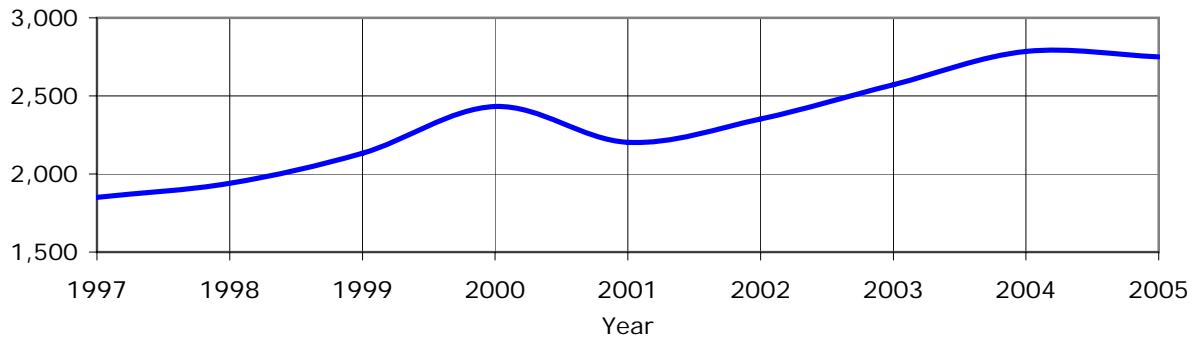


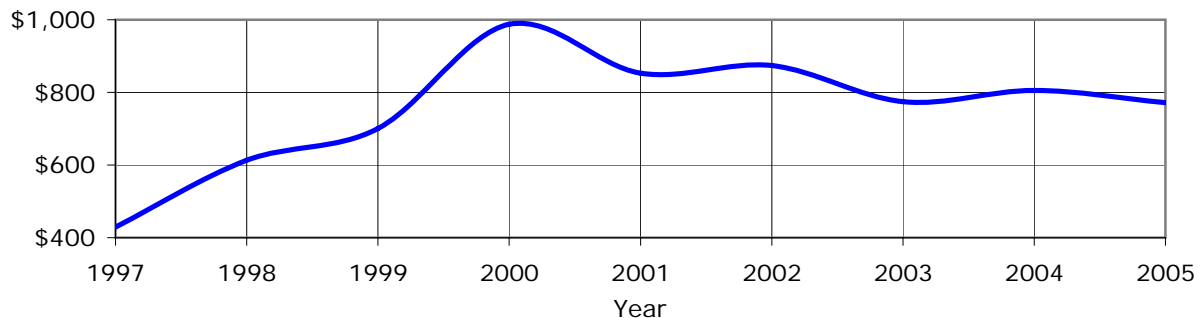
Figure 3-6
Annual Visitor Trends-Annual Visitor Spending (1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Visitor Spending	\$429	\$613	\$701	\$988	\$853	\$874	\$774	\$805	\$772

Note: Data in Millions

Source: Leon County Tourist Development Council

Annual Visitor Trends (Visitor Spending in Millions)
1997-2005



3.5 Florida Price Level Index

The Florida Price Level Index is a cross-sectional measure that compares the cost of living or relative wage levels among Florida's 67 counties and is not designed to measure inflation from one year to the next. The FPLI is used as a cost of living index to measure the relative costs of maintaining a given standard of living across Florida's counties. Thus, the relative costs of goods and services in the Tallahassee area have been below the State of Florida average in each of the past three years and have decreased in terms of relative costs in comparison with other Florida counties since 2003.

Figure 3-7
Florida Price Level Index (2003-2005)

County	2003	2004	2005
Leon	103.22	99.46	97.58
Gadsden	99.42	96.84	95.01
Jefferson	99.15	96.57	94.75
Wakulla	99.48	96.90	95.07

Note: The Florida Price Level Index (FPLI) was established by the Florida Legislature as the basis for the District Cost Differential (DCD) in the Florida Education Finance Program. In this role, the FPLI is used to represent the costs of hiring equally qualified personnel across school districts. Referred to as the FPLI_SP, this index is more appropriate for comparing the costs of hiring equally qualified personnel to do identical jobs across locations at a given point in time. The FPLI_SP is constructed so that the population-weighted average is 100. In 2005, counties with index values above 100 contain 58.2% of the state's population.

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 (last quarter for which Tallahassee data was available)

3.7 Consumer Price Index (CPI-U)

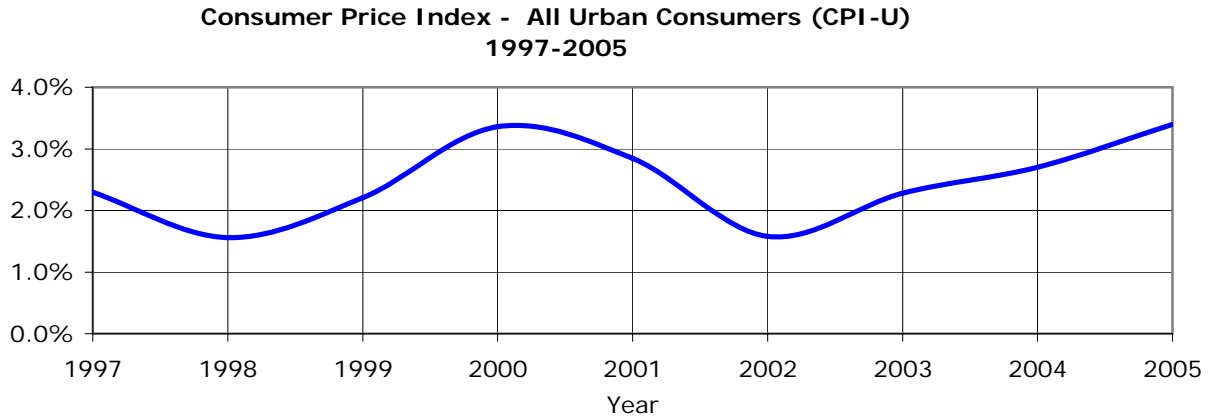
The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 3.4% in 2005, up from 2.7% in 2004 and tied with the year 2000 as the highest annual increase since 1991. Between 2000 and 2005, price levels have increased 13.4%.

Figure 3-9
Consumer Price Index for all Urban Consumers (CPI-U, 1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004	2005
U.S. City Average	160.5	163.0	166.6	172.2	177.1	179.9	184.0	188.9	195.3
% Change from Previous	2.3%	1.6%	2.2%	3.4%	2.8%	1.6%	2.3%	2.7%	3.4%

Source: U.S. Bureau of Labor Statistics

Figure 3-10
Annual Change in the Consumer Price Index (CPI-U, 1997-2005)



Source: U.S. Bureau of Labor Statistics

3.8 Airport Traffic Statistics

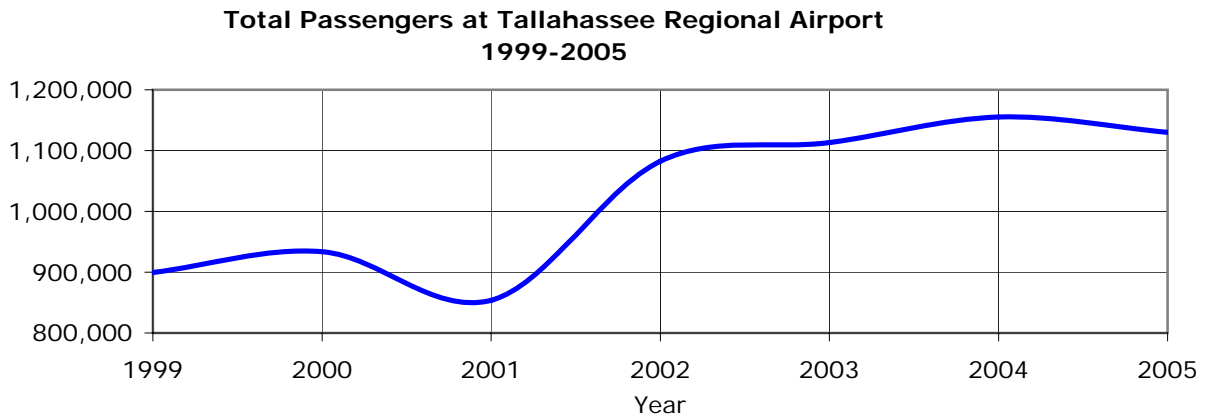
Passenger traffic at Tallahassee Regional Airport fell off slightly in 2005 from the previous years' record levels. The dip was primarily a result of a decrease in deplanements.

**Figure 3-11
Tallahassee Regional Airport Traffic Statistics (1999-2005)**

	1999	2000	2001	2002	2003	2004	2005
Enplanements	450,403	468,703	427,892	543,674	560,885	580,510	576,104
Deplanements	449,122	464,897	425,734	538,911	552,358	574,562	553,843
Total Passengers	899,525	933,600	853,626	1,082,585	1,113,243	1,155,072	1,129,947

Source: City of Tallahassee, Aviation Department

**Figure 3-12
Total Passengers at Tallahassee Regional Airport (1999-2005)**



Source: City of Tallahassee, Aviation Department

Section 4

Education

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4.1 Higher Education Institutions Enrollment

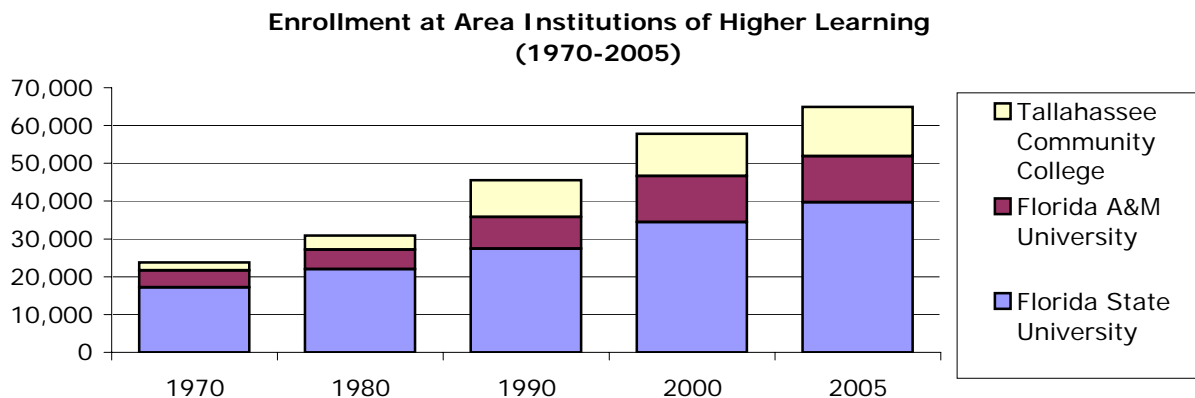
Nearly 65,000 students were enrolled in the fall semester 2005 at the three largest institutions for higher learning in Leon County. Total enrollment at the three schools has more than doubled since 1980.

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	34,485	12,161	11,207	57,853
2005	39,672	12,176	13,042	64,890

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

Figure 4-2
Enrollment at Area Institutions of Higher Learning (1970-2005)



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 17% since 1990). The dropout rate for grades 9-12 dropped to 2.4% in the 2004-2005 school year, the lowest level in at least eight years.

Figure 4-3
Leon County Public School Enrollment, K-12 (1960-2005)

Year	Enrollment
1960	14,959
1970	20,182
1980	21,632
1985	23,445
1990	26,869
1995	30,348
2000	30,958
2001	30,920
2002	30,776
2003	31,037
2004	31,119
2005	31,474

Source: Leon County Public Schools

Figure 4-4
Leon County Public School Dropout Statistics, Grades 9-12 (1996-97-2004-05)

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%
2004-05	2.4%

Source: Leon County Public Schools

4.3 Leon County Public School Grades

Eighty-three percent (up from 77% in 2005 and 70% in 2004) of Leon County Public Schools received an A or B grade in 2006 compared with 75% for the state.

Figure 4-5
Leon County Public School Grades, K-12 (2001-2006)

School Name	2006 Grade	2005 Grade	2004 Grade	2003 Grade	2002 Grade	2001 Grade
Leon High School	A	B	B	A	A	A
Kate Sullivan Elementary School	A	A	A	A	A	B
Elizabeth Cobb Middle School	A	A	A	A	A	A
Frank Hartsfield Elementary School	B	B	B	A	A	A
James Rickards High School	C	D	C	C	C	C
Bond-Wesson Elementary School	B	B	C	C	F	C
Sabal Palm Elementary School	A	C	C	A	C	C
Caroline Brevard Elementary School	C	C	C	C	C	C
Lillian Ruediger Elementary School	A	A	A	A	A	A
Augusta Raa Middle School	A	A	A	A	A	A
Woodville Elementary School	B	B	B	B	C	C
Amos P. Godby High School	D	D	D	C	C	C
Oak Ridge Elementary School	C	D	C	C	C	C
Sail	B	B	B	A	A	A
Griffin Middle School	A	B	C	A	A	A
John G. Riley Elementary School	B	C	C	B	D	N
R. Frank Nims Middle School	D	D	C	C	C	C
Pineview Elementary School	A	B	A	B	C	A
Gilchrist Elementary School	A	A	A	A	A	A
Belle Vue Middle School	C	C	C	C	C	C
Astoria Park Elementary School	A	A	A	A	A	B
Walter T. Moore Jr. Elementary School	B	A	A	A	A	B
Sealey Elementary School	A	B	A	A	A	B
Apalachee Elementary School	B	A	B	A	C	C
Fairview Middle School	A	B	B	B	B	A
Killearn Lakes Elementary School	A	A	A	A	A	A
Chaires Elementary School	A	A	A	A	B	C
Springwood Elementary School	A	A	A	A	A	B
Desoto Trail Elementary School	A	A	A	A	A	A
Buck Lake Elementary School	A	A	A	A	A	A
Deerlake Middle School	A	A	A	A	A	A
Fort Braden Elementary School	B	B	C	A	C	A
Lincoln High School	B	B	B	A	A	C
Hawks Rise Elementary School	A	A	A	A	A	A
Lawton Chiles High School	A	B	B	A	A	A
Swift Creek Middle School	A	A	A	A	A	A
Canopy Oaks Elementary School	A	A	A	A	A	B
Roberts Elementary School	A	A	A	A	N	
Academy of Academics & Technology	F					
C.K. Steele-Leroy Collins Charter Middle School	A	A	C	D	C	D
The School of Arts & Sciences	A	A	A	A	N	B

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 six of the past seven years.

Figure 4-6
SAT Mean Results, Total (1999-00-2004-05)

	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05
Leon County School District	1,057	1,051	1,052	1,057	1,055	1,071
State Of Florida Average	998	997	995	996	998	996
U.S. Average	1,019	1,020	1,020	1,026	1,026	1,028

Note: This report summarizes results for Leon District's graduating seniors of 2004-05 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, 2005. 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 (1999-00-2004-05)

	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05
Leon County School District	21.1	20.8	20.9	21.0	21.1	21.1
State Of Florida Average	20.6	20.4	20.4	20.5	20.5	20.4
U.S. Average	21.0	21.0	20.8	20.8	20.9	20.9

Note: This report summarizes results for Leon District's graduating seniors of 2004-05 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 almost 75 additional square miles having been added during this time, swelling the size of Tallahassee to 102.67 square miles as of December 31, 2005. 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 (1927-2005)

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
2005	102.00	0.67	102.67

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

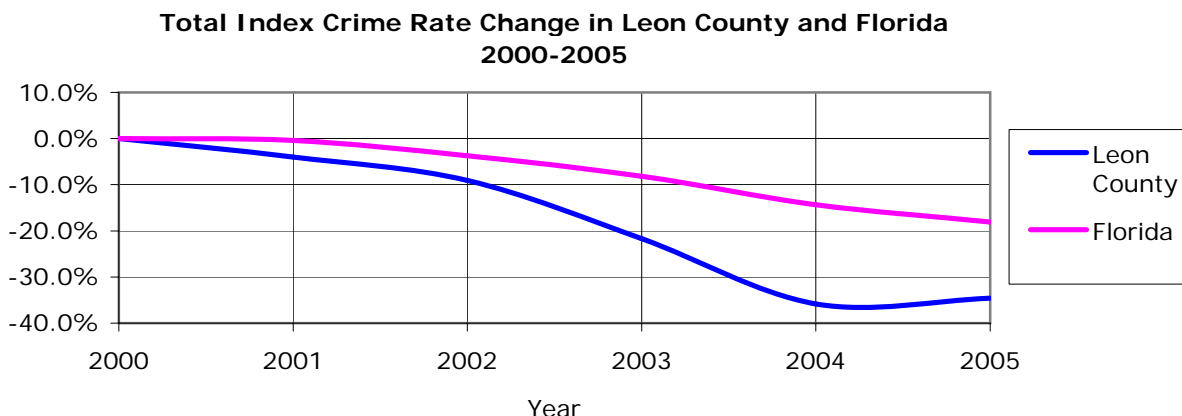
From 2000 to 2005, Leon County experienced a considerable annual decline in total index crimes (violent crimes and property crimes), down 6.9% annually compared with 3.6% for the state. The index rate for violent crimes in Leon County has dropped 6.0% per year on average since 2000 while property crimes have dropped 7.1% per year on average over the same period.

Figure 5-3
Leon County Crime Rates, Rate per 100,000 Residents (2000-2005)

Type of Crime	2000	2001	2002	2003	2004	2005	Avg. Annual Rate Change (2000-2005)
Violent Crimes	1,054.5	1,006.1	846.2	736.6	756.4	781.6	-6.0%
Murder	3.8	2.9	3.6	3.1	4.9	4.1	1.5%
Forcible Sex Offenses	103.2	117.5	109.3	108.8	114.4	103.3	0.0%
Robbery	219.3	222.4	187.1	158.1	148.2	170.0	-5.1%
Aggravated Assault	728.3	663.4	546.3	466.5	488.5	504.2	-7.4%
Property Crime	5,913.1	5,687.8	5,516.1	4,871.2	4,112.2	4,149.6	-7.1%
Burglary	1,495.5	1,429.9	1,367.1	1,228.2	1,368.3	1,248.6	-3.6%
Larceny	3,993.7	3,790.6	3,730.1	3,280.2	2,355.9	2,555.8	-8.9%
Auto Theft	423.9	467.2	418.9	362.8	388.0	345.2	-4.1%
Index Rate	6,967.6	6,693.9	6,362.3	5,607.8	4,868.6	4,931.2	-6.9%

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

Figure 5-4
Total Index Crime Rate Change in Leon County and Florida (2000-2005)



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 (2005)

Taxing Authority	Millage Rate	Where Tax is Applied
Leon County Commission		
General Property Tax	8.540	Anywhere in Leon County
County Health MSTU	0.120	Anywhere in Leon County
County EMS MSTU	0.500	Anywhere in Leon County
Leon County School Board		
State Law	5.254	Anywhere in Leon County
Local Board	2.760	Anywhere in Leon County
School Board	0.652	Anywhere in Leon County
Tallahassee City Commission	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	21.576	
Outside City Limits Total	17.876	
Downtown Improvement Area	22.576	

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 posted near record numbers in 2005 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 rose 22%, attached single-family (townhomes) permits jumped 130% while multi-family permits fell 5% in 2005 compared with 2004 levels.

Figure 6-1
Residential Building Permits Issued By Type in Leon County
(1985-2005)

Year	Detached Single- Family	Attached Single- Family	Multi-Family	Constructed Units Permitted	Mobile Homes*	Total Housing Units Permitted
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	184	1,492	2,952	351	3,303
2005	1,552	392	1,411	3,355	228	3,583

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

Sources: Permit Enforcement Tracking System, 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		
	City of Tallahassee	County	Leon 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
2006	80,852	39,309	120,160
2010	86,711	42,271	128,982
2020	99,929	48,915	148,845
2030	110,331	54,119	164,450

Sources: U.S. Department of Commerce, Bureau of the Census (1970-2000),
Tallahassee-Leon County Planning Department (2006-2030)

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

Year	Unincorporated Leon		
	City of Tallahassee	County	Leon County
1970	5.0%	4.2%	4.7%
1980	8.5%	8.9%	8.6%
1990	8.7%	6.6%	8.0%
2000	7.6%	6.3%	7.2%

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

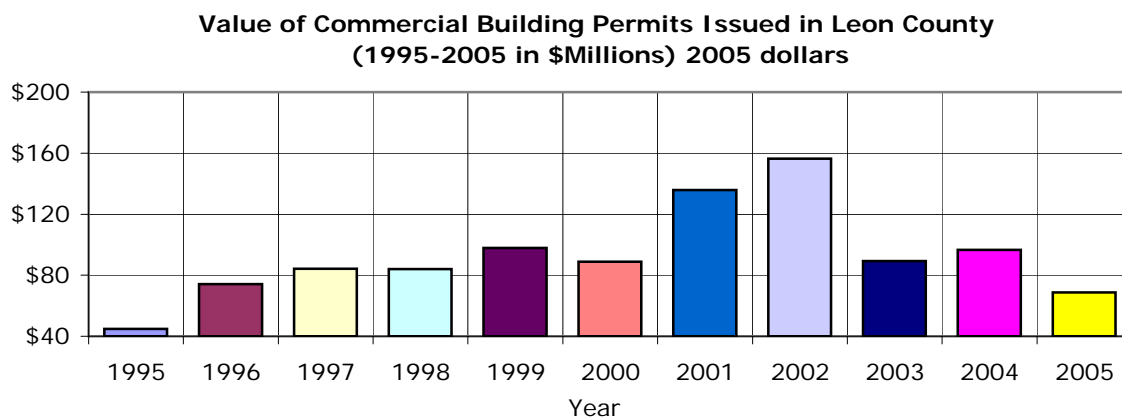
The value of commercial permits issued in 2005 decreased 26% compared to 2004 levels. Part of the reason for this decline could be the absence of any "big box" retail establishments being permitted nor any major hospital expansions in 2005. The two largest commercial permits issued in 2005 were the Residence Inn-Tallahassee (\$9.5m) and the Staybridge Hotel @ Summit East (\$7m). The largest overall building permits issued in Leon County in 2005 by dollar value are not included in the value of commercial permits. These permits were for two downtown condominium projects, Plaza Tower (\$25,000,000) and Tallahassee Center (\$12,000,000). Currently, buildings that include a mixture of residential and commercial uses are tracked by the number of dwelling units rather than the square footage of commercial development. The permit tracking system is being reviewed to potentially allow for more precise monitoring of mixed-use buildings.

Figure 6-4
Commercial Building Permits Issued in Leon County (1995-2005)

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2005 Dollars (\$Millions)
1995	101	\$35.9	\$44.9
1996	107	\$60.7	\$74.2
1997	115	\$70.2	\$84.2
1998	145	\$71.1	\$84.1
1999	144	\$84.3	\$97.9
2000	119	\$78.7	\$88.8
2001	140	\$123.5	\$135.8
2002	129	\$144.3	\$156.3
2003	104	\$84.1	\$89.2
2004	106	\$93.4	\$96.6
2005	86	\$68.7	\$68.7

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

Figure 6-5
Value of Commercial Building Permits Issued (1995-2005)



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

6.4 Urban Service Area Development

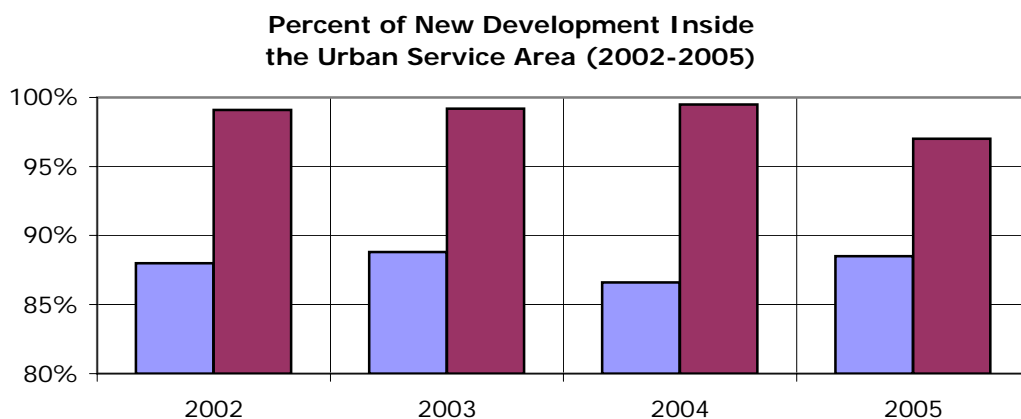
The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA) concept. The USA is the compact area in which urban infrastructure is presently available or anticipated to be furnished within the planning horizon, which is the year 2020. The USA includes the City of Tallahassee, its urban environs, and the surrounding area. The location and size of the USA (161.3 square miles) is based upon the area necessary to accommodate 90% of new residential dwelling units within the County by 2020.

Figure 6-6
Percent of New Development Inside the Urban Service Area *

Year	Residential	Commercial
2002	88.0%	99.1%
2003	88.8%	99.2%
2004	86.6%	99.5%
2005	88.5%	97.0%

Note: Residential Development measured in units constructed, commercial development, sq. ft. constructed
Sources: Permit Enforcement Tracking System, Leon County Department of Growth and Environmental Management, City of Tallahassee Growth Management Department

Figure 6-7
New Development Inside the Urban Service Area (2002-2005)



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

6.5 Office Market Summary

The overall office vacancy rate in Leon County decreased in 2006 for a third year in a row, down to 7.9% for the county as a whole. Vacancy in the downtown central business district jumped to 8.4%. This increase is almost completely attributable to the addition to the 2006 Survey of four 30+ year old) vacant office buildings. The Northeast continues to be the tightest market with a vacancy rate below 2% and the Northwest/West with the highest vacancy (11.9%).

**Figure 6-8
Office Market Survey (First Quarter 2006)**

Market	Number of Properties	Square Feet Surveyed	Square Feet Vacant	Percent Vacant	Asking Rents*
Downtown	25	1,075,753	90,280	8.39%	\$21.00-\$28.00**
Northeast	43	1,295,743	24,121	1.86%	\$16.00-\$25.00
Northwest/West	22	1,435,077	170,993	11.92%	\$14.00-\$16.00
Southeast	23	2,615,128	220,096	8.42%	\$12.00-\$18.50
Total	113	6,421,701	505,490	7.87%	\$12.00-\$25.00

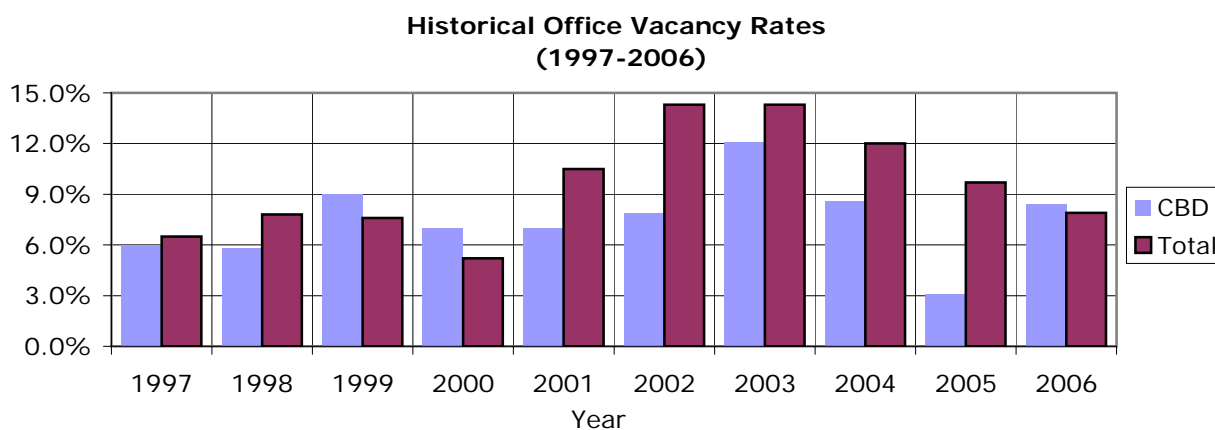
*All rents adjusted to full service (operating expenses include utilities and janitorial)

**Downtown CBD (Central Business District)

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

Source: Coldwell Banker Hartung and Noblin, Inc.

**Figure 6-9
Historical Office Vacancy Rates (1997-2006)**



Source: Coldwell Banker Hartung and Noblin, Inc.

6.6 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 6-10
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%

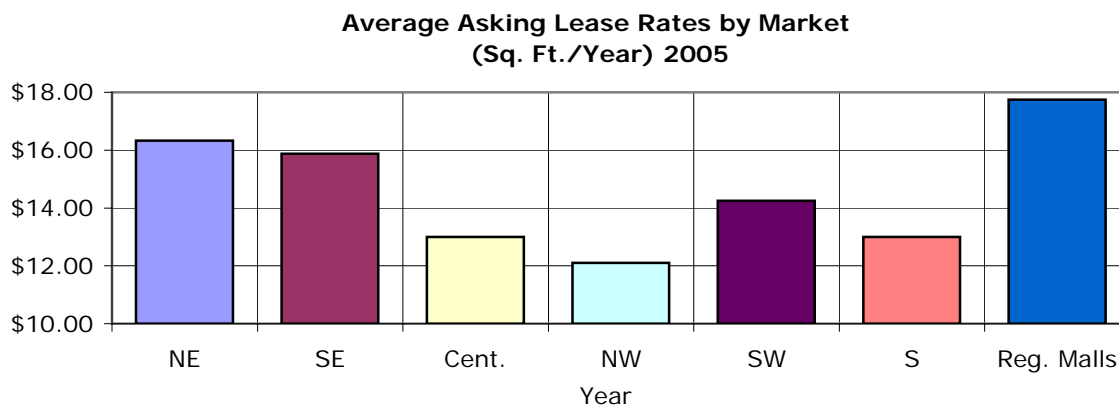
Note: Survey only includes buildings 45,000 sq. ft. and larger.

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 6-11
Average Asking Lease Rates by Market (2005)



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

www.southlandcommercial.com

6.7 Apartment Market Summary

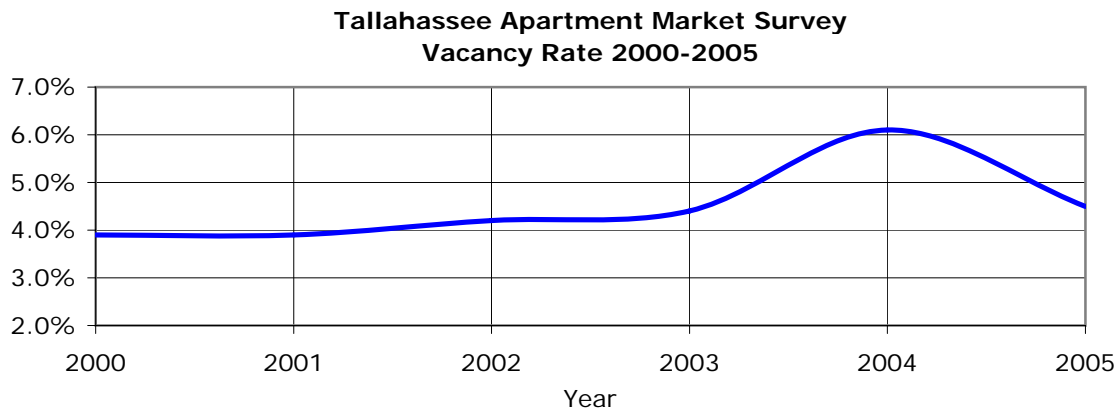
The apartment vacancy rate in Tallahassee declined from 6.1% in September 2004 to 4.5% in September 2005. The average rent now exceeds over \$800 and the average square footage continues to increase due to the fact most of the newer apartment communities are student oriented communities with three and four bedroom units.

**Figure 6-12
Apartment Market Survey (2000-2005)**

	Sept. 2000	Sept. 2001	Sept. 2002	Sept. 2003	Sept. 2004	Sept. 2005
Total Units	15,927	15,775	16,433	17,401	18,206	18,000
Vacant Units	628	608	695	764	1,102	817
Vacancy Rate	3.9%	3.9%	4.2%	4.4%	6.1%	4.5%
Avg. Sq. Ft. Range	850-900	850-900	900-950	950-1,000	950-1,000	1,000-1,050
Avg. Rent/Month Range	\$550-\$600	\$600-\$650	\$700-\$750	\$750-\$800	\$750-\$800	\$800-\$850

*Note: Survey includes communities with 40 or more units, public and Section 8 housing is excluded
Thirteen communities that fit the above criteria, approx. 1,000 units that did not participate in the survey.
Source: Real Data, 2005 Tallahassee Apartment Index, September 2005*

**Figure 6-13
Apartment Market Vacancy Rate (2000-2005)**



Source: Real Data, 2005 Tallahassee Apartment Index, September 2005

6.8 Median Residential Sale Prices

The sales price of a detached single-family home in Leon County increased \$79,595 (59%) between the first quarter 2002 and fourth quarter 2005. During the same period, the sales price of condominiums more than doubled while the sales prices for townhouses nearly doubled.

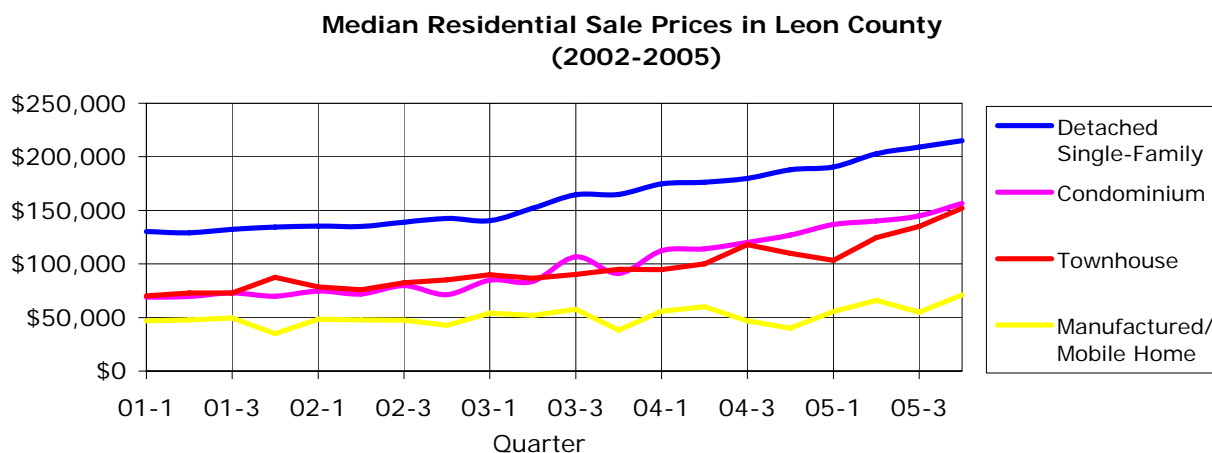
Figure 6-14
Median Residential Sale Prices in Leon County (2002-2005)

Quarter	Detached Single-Family	Condominium	Townhouse	Manufactured/ Mobile Home
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
2005-1	\$190,450	\$136,945	\$103,450	\$55,500
2005-2	\$202,900	\$140,000	\$124,650	\$66,000
2005-3	\$209,000	\$144,900	\$135,000	\$55,000
2005-4	\$215,000	\$156,450	\$152,000	\$71,000

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

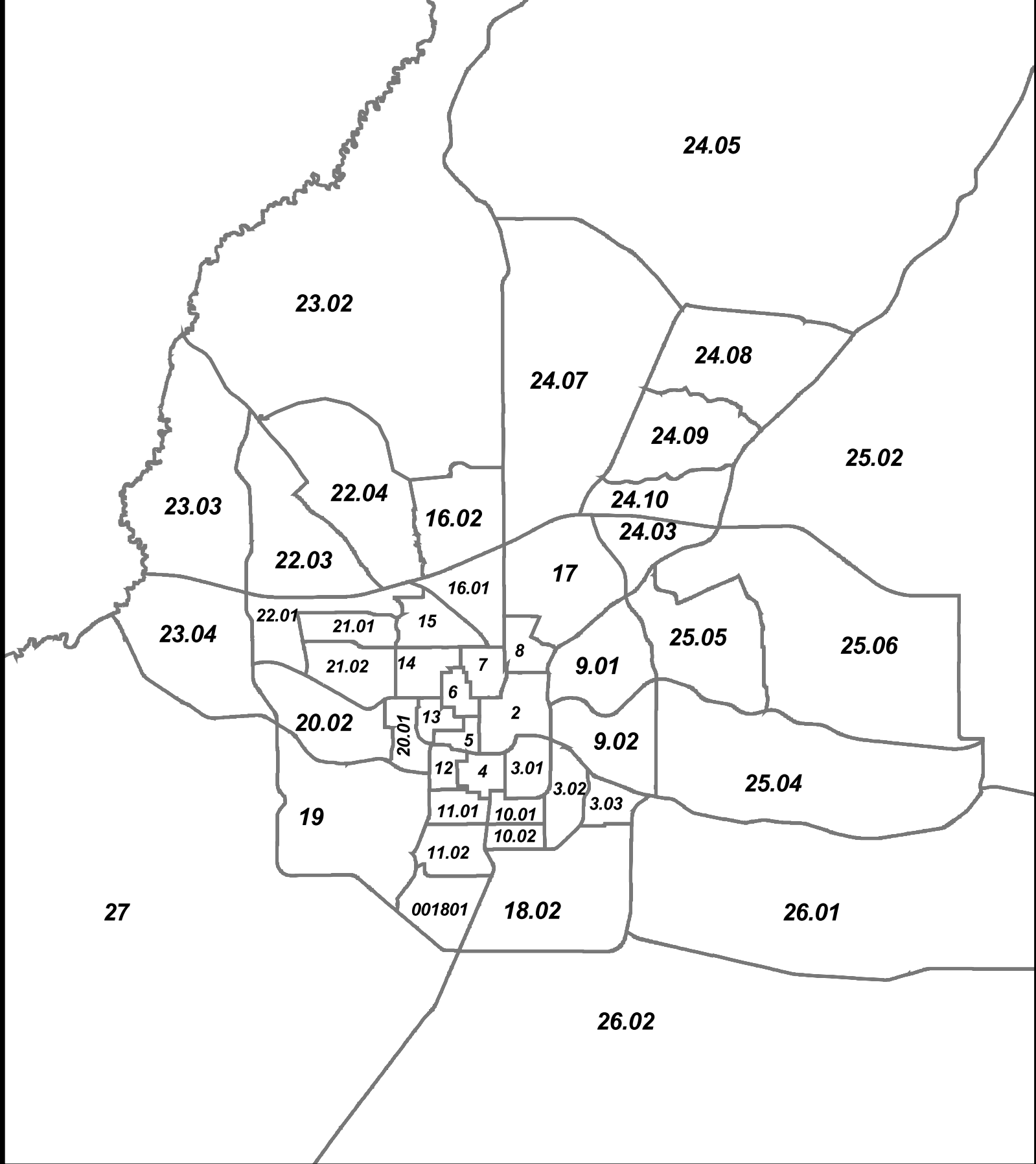
Source: Tallahassee Board of Realtors, Market Trends & Research

Figure 6-15
Median Residential Sale Prices in Leon County (2002-2005)



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

Source: Tallahassee Board of Realtors, Market Trends & Research



Census 2000 Tracts for Leon County