

TALLAHASSEE-LEON COUNTY PLANNING DEPARTMENT
2012 Statistical Digest
September 2012

| | |
|--|----|
| Section 1: Demographics | 1 |
| 1.1 Population Estimates and Projections | 2 |
| 1.2 Population Estimates by Census Tract | 3 |
| 1.3 Age and Gender | 4 |
| 1.4 Race and Ethnicity | 5 |
| 1.5 Components of Population Change | 6 |
| 1.6 Population Growth by Metropolitan Area | 7 |
| 1.7 Household Characteristics | 8 |
| 1.8 Educational Attainment | 9 |
| | |
| Section 2: Labor Force and Income | 10 |
| 2.1 Labor Force and Employment | 11 |
| 2.2 Unemployment | 12 |
| 2.3 Employment by Industry | 13 |
| 2.4 Projected Employment by Industry | 14 |
| 2.5 Projected Employment by Occupation | 15 |
| 2.6 Median Family Income | 16 |
| 2.7 Average Annual Employment/Wages | 17 |
| 2.8 Occupational Employment and Wages | 18 |
| 2.9 Per Capita Income | 19 |
| | |
| Section 3: Economic Factors | 20 |
| 3.1 Taxable Sales | 21 |
| 3.2 FDIC Summary of Deposits | 22 |
| 3.3 Annual Visitor Trends | 23 |
| 3.4 Florida Price Level Index | 24 |
| 3.5 Gross Domestic Product by Metro. Area | 25 |
| 3.6 Consumer Price Index (CPI-U) | 26 |
| 3.7 Tallahassee Regional Airport Traffic Statistics | 27 |
| | |
| Section 4: Education | 28 |
| 4.1 Higher Education Institutions Enrollment | 29 |
| 4.2 Leon County Public Schools Statistics | 30 |
| 4.3 Leon County Public School Grades | 31 |
| 4.4 SAT and ACT Results | 32 |
| | |
| Section 5: Community and Environment | 33 |
| 5.1 History of Tallahassee/Leon County | 34 |
| 5.2 Tallahassee's History of Annexations | 36 |
| 5.3 Climate | 37 |
| 5.4 Public Safety | 38 |
| 5.5 Local Government | 39 |
| | |
| Section 6: Residential and Commercial Development | 40 |
| 6.1 Residential Development | 41 |
| 6.2 Housing Unit Inventory/Vacancy Rates | 42 |
| 6.3 Commercial Development | 43 |
| 6.4 Urban Service Area Development | 44 |
| 6.5 Office Market Summary | 45 |
| 6.6 Apartment Market Summary | 46 |
| 6.7 Industrial Market Summary | 47 |
| 6.8 Median Residential Sale Prices | 48 |
| 6.9 Mortgage Foreclosure Cases | 49 |

Section 1

Demographics

Topics

| | | |
|-----|--|---|
| 1.1 | Population Estimates and Projections | 2 |
| 1.2 | Population Growth by Census Tract | 3 |
| 1.3 | Age and Gender | 4 |
| 1.4 | Race and Ethnicity | 5 |
| 1.5 | Components of Population Change | 6 |
| 1.6 | Population Growth by Metropolitan Area | 7 |
| 1.7 | Household Characteristics | 8 |
| 1.8 | Educational Attainment | 9 |

Figures

| | | |
|------|---|---|
| 1-1 | Population Estimates (1930-2012) | 2 |
| 1-2 | Population Projections (2015-2040) | 2 |
| 1-3 | Population Growth by Census Tract, (2000-2010) | 3 |
| 1-4 | Leon County Population by Age and Gender (2011 Estimate) | 4 |
| 1-5 | Leon County Population Growth by Age Group (2010-2011) | 4 |
| 1-6 | Leon County Population by Age, Race and Ethnicity (2011) | 5 |
| 1-7 | Leon County Population by Percentage, Race and Ethnicity (2011) | 5 |
| 1-8 | Components of Population Change (2010-2011) | 6 |
| 1-9 | Components of Population Change (1990-2000) | 6 |
| 1-10 | Population Growth in Florida Metropolitan Areas (2000-2011) | 7 |
| 1-11 | Number of Households and Average Household Size (2000, 2010 and 2011) | 8 |
| 1-12 | Households by Type (2010) | 8 |
| 1-13 | Educational Attainment in Leon County, Population 25 years and over | 9 |
| 1-14 | Educational Attainment, Population 25 years and over (2010) | 9 |

1.1 Population Estimates and Projections

Leon County's population increased by 36,035 residents between the 2000 and 2010 Census. More than 85% of the population growth in Leon County between 2000 and 2010 occurred within the City of Tallahassee while 15% of the growth was in Unincorporated Leon County. In comparison, between 1990 and 2000, 45% of the population growth occurred in Unincorporated Leon County.

**Figure 1-1
Population Estimates (1930-2012)**

| Year | City of | Unincorporated | |
|------|-------------|----------------|-------------|
| | Tallahassee | Leon County | Leon County |
| 1930 | 10,700 | 12,776 | 23,476 |
| 1940 | 16,240 | 15,406 | 31,646 |
| 1950 | 27,237 | 24,353 | 51,590 |
| 1960 | 48,174 | 26,051 | 74,225 |
| 1970 | 71,897 | 31,150 | 103,047 |
| 1980 | 81,548 | 67,107 | 148,655 |
| 1990 | 124,773 | 67,720 | 192,493 |
| 2000 | 150,624 | 88,828 | 239,452 |
| 2010 | 181,736 | 94,111 | 275,487 |
| 2012 | 183,643 | 94,027 | 277,670 |

Sources: U.S. Department of Commerce, Bureau of the Census (1930-2010), University of Florida, Bureau of Economic and Business Research (2011 estimate)

**Figure 1-2
Population Projections (2015-2040)**

| Year | City of | Unincorporated | |
|------|-------------|----------------|-------------|
| | Tallahassee | Leon County | Leon County |
| 2015 | 188,000 | 95,200 | 283,200 |
| 2020 | 199,100 | 97,100 | 296,200 |
| 2025 | 209,700 | 99,000 | 308,700 |
| 2030 | 219,600 | 100,700 | 320,300 |
| 2035 | 228,800 | 102,300 | 331,100 |
| 2040 | 237,500 | 103,700 | 341,200 |

Sources: University of Florida, Bureau of Economic and Business Research (2015-2040 Leon County projections); Tallahassee-Leon County Planning Department (City of Tallahassee and Unincorporated Leon County 2015-2040 projections assuming continued annexations and share of population growth captured by the City between 2000 and 2010 will continue throughout the projected time horizon).

1.2 Population Growth by Census Tract

A total of 20 Census tracts were added in Leon County between the 2000 Census and the 2010 Census. The data below aggregates the 2010 Census population back into the 2000 Census geography for comparison of the population growth between Censuses. Census Tract 26.01 (which includes Southwood) gained 4,452 residents between 2000 and 2010.

Figure 1-3
Population Growth by Census Tract, (2000-2010)

| Census Tract | Total Population 2000 Census | Population Change 2000-2010 | Total Population 2010 Census | Annual Change by Census Tract 2000-2010 |
|--------------|------------------------------|-----------------------------|------------------------------|---|
| 2 | 3,811 | -74 | 3,737 | -0.2% |
| 3.01 | 1,526 | 20 | 1,546 | 0.1% |
| 3.02 | 2,399 | -65 | 2,334 | -0.3% |
| 3.03 | 3,275 | 353 | 3,628 | 1.0% |
| 4 | 2,940 | -547 | 2,393 | -2.1% |
| 5 | 4,569 | -2,136 | 2,433 | -6.3% |
| 6 | 2,900 | 958 | 3,858 | 2.9% |
| 7 | 1,968 | 36 | 2,004 | 0.2% |
| 8 | 2,937 | 36 | 2,973 | 0.1% |
| 9.01 | 6,849 | 1,140 | 7,989 | 1.5% |
| 9.02 | 8,261 | -211 | 8,050 | -0.3% |
| 10.01 | 2,324 | 368 | 2,692 | 1.5% |
| 10.02 | 1,752 | 436 | 2,188 | 2.2% |
| 11.01 | 2,885 | 11 | 2,896 | 0.0% |
| 11.02 | 2,070 | 433 | 2,503 | 1.9% |
| 12 | 1,030 | 284 | 1,314 | 2.4% |
| 13 | 2,591 | 3,961 | 6,552 | 9.3% |
| 14 | 6,870 | 853 | 7,723 | 1.2% |
| 15 | 4,041 | 434 | 4,475 | 1.0% |
| 16.01 | 4,022 | 555 | 4,577 | 1.3% |
| 16.02 | 3,064 | 27 | 3,091 | 0.1% |
| 17 | 7,104 | 166 | 7,270 | 0.2% |
| 18.01 | 3,643 | 323 | 3,966 | 0.8% |
| 18.02 | 3,466 | 1,741 | 5,207 | 4.1% |
| 19 | 7,070 | 27 | 7,097 | 0.0% |
| 20.01 | 7,392 | -594 | 6,798 | -0.8% |
| 20.02 | 7,912 | 1,769 | 9,681 | 2.0% |
| 21.01 | 3,847 | 828 | 4,675 | 1.9% |
| 21.02 | 7,557 | 3,171 | 10,728 | 3.5% |
| 22.01 | 5,220 | -204 | 5,016 | -0.4% |
| 22.03 | 7,594 | 1,216 | 8,810 | 1.5% |
| 22.04 | 7,172 | -159 | 7,013 | -0.2% |
| 23.02 | 3,409 | -67 | 3,342 | -0.2% |
| 23.03 | 3,291 | 639 | 3,930 | 1.8% |
| 23.04 | 2,494 | 404 | 2,898 | 1.5% |
| 24.03 | 2,737 | -61 | 2,676 | -0.2% |
| 24.05 | 10,090 | 3,033 | 13,123 | 2.6% |
| 24.07 | 7,228 | 2,753 | 9,981 | 3.2% |
| 24.08 | 7,600 | 145 | 7,745 | 0.2% |
| 24.09 | 8,573 | 23 | 8,596 | 0.0% |
| 24.10 | 5,583 | 435 | 6,018 | 0.8% |
| 25.02 | 9,654 | 1,948 | 11,602 | 1.8% |
| 25.04 | 7,517 | 3,533 | 11,050 | 3.9% |
| 25.05 | 4,719 | 922 | 5,641 | 1.8% |
| 25.06 | 6,664 | 1,572 | 8,236 | 2.1% |
| 26.01 | 2,998 | 4,452 | 7,450 | 9.1% |
| 26.02 | 7,425 | 674 | 8,099 | 0.9% |
| 27 | 9,409 | 474 | 9,883 | 0.5% |

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

1.3 Age and Gender

Leon County has the second highest percentage of population between the ages of 18 and 24 in the state at 22.5% (behind Alachua County, 22.7%) and the smallest percentage aged 65 and older at 9.9% in the State of Florida.

Figure 1-4
Leon County Population by Age and Gender (2011 Estimate)

| Age Group | Total Population | Percent of Population | Female | Percent of Population | Male | Percent of Population |
|-----------|------------------|-----------------------|---------|-----------------------|---------|-----------------------|
| 0 to 4 | 15,227 | 5.5% | 7,445 | 2.7% | 7,782 | 2.8% |
| 5 to 17 | 38,739 | 14.0% | 19,053 | 6.9% | 19,686 | 7.1% |
| 18 to 24 | 62,080 | 22.5% | 33,149 | 12.0% | 28,931 | 10.5% |
| 25 to 54 | 103,132 | 37.3% | 53,596 | 19.4% | 49,536 | 17.9% |
| 55 to 64 | 29,876 | 10.8% | 15,838 | 5.7% | 14,038 | 5.1% |
| 65 to 79 | 20,096 | 7.3% | 10,970 | 4.0% | 9,126 | 3.3% |
| 80+ | 7,128 | 2.6% | 4,654 | 1.7% | 2,474 | 0.9% |
| Total | 276,278 | 100.0% | 144,705 | 52.4% | 131,573 | 47.6% |

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 163", June 2012

Figure 1-5
Leon County Population Growth by Age Group (2010-2011)

| Age Group | 2010 Population | 2011 Population Estimate | Growth in Population 2010-2011 | Percent Growth 2010-2011 | Avg. Ann. Growth 2010-2011 |
|-----------|-----------------|--------------------------|--------------------------------|--------------------------|----------------------------|
| 0 to 4 | 15,350 | 15,227 | -123 | -0.8% | -0.1% |
| 5 to 17 | 38,623 | 38,739 | 116 | 0.3% | 0.0% |
| 18 to 24 | 61,897 | 62,080 | 183 | 0.3% | 0.0% |
| 25 to 54 | 103,907 | 103,132 | -775 | -0.7% | -0.1% |
| 55 to 64 | 29,730 | 29,876 | 146 | 0.5% | 0.1% |
| 65 to 79 | 18,962 | 20,096 | 1,134 | 5.8% | 0.7% |
| 80+ | 7,018 | 7,128 | 110 | 1.6% | 0.2% |
| Total | 275,487 | 276,278 | 791 | 0.3% | 0.0% |

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 163", June 2012; U.S. Department of Commerce, Bureau of the Census, Census 2010

1.4 Race and Ethnicity

By race and ethnicity, Leon County's population includes 59.2% non-Hispanic white, 30.0% non-Hispanic black, 5.6% of Hispanic origin and 5.2% of "other" races and ethnicities.

Figure 1-6
Leon County Population by Age, Race and Ethnicity (2011 Estimate)

| Age Group | All Races | Non-Hispanic | | | Hispanic Origin |
|-----------|-----------|--------------|--------|--------|-----------------|
| | | White | Black | Other | |
| 0 to 4 | 15,227 | 6,707 | 6,087 | 1,374 | 1,059 |
| 5 to 17 | 38,739 | 19,516 | 14,222 | 2,677 | 2,324 |
| 18 to 24 | 62,080 | 34,067 | 19,868 | 2,867 | 5,278 |
| 25 to 54 | 103,132 | 60,677 | 31,076 | 5,835 | 5,544 |
| 55 to 64 | 29,876 | 21,805 | 6,377 | 933 | 761 |
| 65 to 79 | 20,096 | 15,211 | 3,881 | 537 | 467 |
| 80+ | 7,128 | 5,652 | 1,248 | 92 | 136 |
| Total | 276,278 | 163,635 | 82,759 | 14,315 | 15,569 |

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 163", June 2012

Figure 1-7
Leon County Pop. by Percentage, Race & Ethnicity (2011 Estimate)

| Age Group | Non-Hispanic | | | Hispanic Origin |
|-----------|--------------|-------|-------|-----------------|
| | White | Black | Other | |
| 0 to 4 | 44.0% | 40.0% | 9.0% | 7.0% |
| 5 to 17 | 50.4% | 36.7% | 6.9% | 6.0% |
| 18 to 24 | 54.9% | 32.0% | 4.6% | 8.5% |
| 25 to 54 | 58.8% | 30.1% | 5.7% | 5.4% |
| 55 to 64 | 73.0% | 21.3% | 3.1% | 2.5% |
| 65 to 79 | 75.7% | 19.3% | 2.7% | 2.3% |
| 80+ | 79.3% | 17.5% | 1.3% | 1.9% |
| Total | 59.2% | 30.0% | 5.2% | 5.6% |

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 163", June 2011

1.5 Components of Population Change

The components of population change in Leon County in the last decade (2000-2010) changed considerably in comparison with the 1990-2000 time period. The percentage of Leon County's population growth associated with net migration dropped from 67.1% in 2000 to 56.1% in 2010. In total, net natural increase (births minus deaths) increased slightly from 15,816 between 2000-2010 compared with 15,457 between 1990-2000, however total net migration over the decade dropped considerably, from 31,502 (1990-2000) to 20,219 (2000-2010).

Figure 1-8
Components of Population Change (2010-2011)

| | Leon County | State of Florida |
|-------------------------------------|-------------|------------------|
| Total Population Change (2010-2011) | 791 | 103,738 |
| Net Natural Increase | 1,436 | 42,010 |
| Births | 3,087 | 214,519 |
| Deaths | 1,651 | 172,509 |
| Net Migration | -645 | 61,728 |
| Percent due to Natural Increase | 100.0% | 40.5% |
| Percent due to Net Migration | 0.0% | 59.5% |

Source: University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2011

Figure 1-9
Components of Population Change (2000-2010)

| | Leon County | State of Florida |
|-------------------------------------|-------------|------------------|
| Total Population Change (2000-2010) | 36,035 | 2,818,486 |
| Net Natural Increase | 15,816 | 518,766 |
| Net Migration | 20,219 | 2,299,720 |
| Percent due to Natural Increase | 43.9% | 18.4% |
| Percent due to Net Migration | 56.1% | 81.6% |

Source: University of Florida, Bureau of Economic and Business Research, Florida Population: Census Summary 2010, April 2011

1.6 Population Growth by Metropolitan Area

The population of the Tallahassee MSA (Gadsden, Jefferson, Leon and Wakulla Counties) was 370,021 in 2010, up 0.7% from 2010.

Figure 1-10
Population Growth in Florida Metropolitan Areas (2000-2011)

| Metropolitan Area/County(ies) | 2011 Population Estimate | 2010 Census Population | 2000 Census Population | Percent Change 2000-2010 |
|---|--------------------------------|------------------------------|------------------------------|--------------------------------|
| All Metropolitan Areas | 17,790,444 | 17,689,964 | 15,023,351 | 17.7% |
| Miami-Fort Lauderdale-Pompano Beach (<i>Broward, Miami-Dade, Palm Beach</i>) | 5,595,435 | 5,564,635 | 5,007,988 | 11.1% |
| Tampa-St. Petersburg-Clearwater (<i>Hernando, Hillsborough, Pasco, Pinellas</i>) | 2,797,058 | 2,783,243 | 2,396,013 | 16.2% |
| Orlando-Kissimmee-Sanford (<i>Lake, Orange, Osceola, Seminole</i>) | 2,154,061 | 2,134,411 | 1,644,563 | 29.8% |
| Jacksonville (<i>Baker, Clay, Duval, Nassau, St. Johns</i>) | 1,349,207 | 1,345,596 | 1,122,750 | 19.8% |
| North Port-Bradenton-Sarasota (<i>Manatee, Sarasota</i>) | 707,224 | 702,281 | 589,963 | 19.0% |
| Cape Coral-Fort Myers (<i>Lee</i>) | 625,310 | 618,754 | 440,888 | 40.3% |
| Lakeland (<i>Polk</i>) | 604,792 | 602,095 | 483,924 | 24.4% |
| Palm Bay-Melbourne-Titusville (<i>Brevard</i>) | 545,184 | 543,376 | 476,230 | 14.1% |
| Deltona-Daytona Beach-Ormond Beach (<i>Volusia</i>) | 495,400 | 494,593 | 443,343 | 11.6% |
| Pensacola-Ferry Pass-Brent (<i>Escambia, Santa Rosa</i>) | 454,162 | 448,991 | 412,153 | 8.9% |
| Port St. Lucie (<i>Martin, St. Lucie</i>) | 426,385 | 424,107 | 319,426 | 32.8% |
| Tallahassee (<i>Gadsden, Jefferson, Leon, Wakulla</i>) | 370,021 | 367,413 | 320,304 | 14.7% |
| Ocala (<i>Marion</i>) | 331,745 | 331,298 | 258,916 | 28.0% |
| Naples-Marco Island (<i>Collier</i>) | 323,785 | 321,520 | 251,377 | 27.9% |
| Gainesville (<i>Alachua, Gilchrist</i>) | 264,320 | 264,275 | 232,392 | 13.7% |
| Crestview-Fort Walton Beach-Destin (<i>Okaloosa</i>) | 181,679 | 180,822 | 170,498 | 6.1% |
| Panama City-Lynn Haven-Panama City Beach (<i>Bay</i>) | 169,278 | 168,852 | 148,217 | 13.9% |
| Punta Gorda (<i>Charlotte</i>) | 160,463 | 159,978 | 141,627 | 13.0% |
| Sebastian-Vero Beach (<i>Indian River</i>) | 138,694 | 138,028 | 112,947 | 22.2% |
| Palm Coast (<i>Flagler</i>) | 96,241 | 95,696 | 49,832 | 92.0% |

Sources: Executive Office of the President, U.S. Office of Management and Budget MSA definitions (OMB Bulletin No. 10.02); U.S. Department of Commerce, Bureau of the Census; University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2011

1.7 Household Characteristics

The average household size increased slightly in Leon County, from 2.34 persons per household in 2000 to 2.35 persons per household in 2010. In Leon County, the percentage of family households is higher in the unincorporated areas while the percentage of non-family households and one-person households is highest in the City of Tallahassee.

Figure 1-11
Number of Households and Average Household Size
(2000, 2010 and 2011)

| | Estimate April 1, 2011 | | Census April 1, 2010 | | Census April 1, 2000 | |
|-------------|------------------------|------------------------|----------------------|------------------------|----------------------|------------------------|
| | Households | Average Household Size | Households | Average Household Size | Households | Average Household Size |
| Leon County | 111,256 | 2.35 | 110,945 | 2.35 | 96,521 | 2.34 |
| Florida | 7,461,969 | 2.48 | 7,420,802 | 2.48 | 6,338,075 | 2.46 |

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 161", January 2012

Figure 1-12
Households by Type (2010)

| | Families | Living Alone | Other Non-Families |
|---------------------|----------|--------------|--------------------|
| Leon County | 55% | 30% | 15% |
| City of Tallahassee | 46% | 34% | 20% |
| Unincorporated Area | 73% | 22% | 5% |
| Florida | 65% | 27% | 8% |

Source: U.S. Department of Commerce, Bureau of the Census, Census 2010

1.8 Educational Attainment

The level of educational attainment in Leon County increased between 2000 and 2010. In 2010, 9.4% of the population 25 years and over had not received a high school diploma, down from 9.9% in 2000. In comparison, 41.3% of Leon County residents 25 years and over had obtained a Bachelor's degree or higher compared with 27.9% for the nation and 25.9% for the state.

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

| | 1990 | Percent | 2000 | Percent | 2010 | Percent |
|----------------------------------|---------|---------|---------|---------|---------|---------|
| Less than 9th grade | 6,046 | 5.5% | 4,218 | 3.1% | 3,762 | 2.4% |
| 9th to 12th grade, no diploma | 10,622 | 9.6% | 10,749 | 7.8% | 10,802 | 7.0% |
| H.S. graduate (inc. equivalency) | 23,793 | 21.6% | 25,963 | 18.9% | 32,696 | 21.2% |
| Some college, no degree | 20,414 | 18.5% | 27,956 | 20.3% | 30,869 | 20.0% |
| Associate's degree | 8,457 | 7.7% | 11,255 | 8.2% | 12,393 | 8.0% |
| Bachelor's degree | 23,675 | 21.5% | 33,040 | 24.0% | 36,930 | 24.0% |
| Graduate or professional degree | 17,180 | 15.6% | 24,356 | 17.7% | 26,697 | 17.3% |
| Total | 110,187 | | 137,537 | | 154,149 | |

Source: U.S. Department of Commerce, Bureau of the Census, 1990, 2000, American Community Survey, 2006-2010

Figure 1-14
Educational Attainment, Population 25 years and over (2010)

| | Leon County | | State of Florida | | United States | |
|----------------------------------|-------------|---------|------------------|---------|---------------|---------|
| | Number | Percent | Number | Percent | Number | Percent |
| Less than 9th grade | 3,762 | 2.4% | 725,025 | 5.7% | 12,435,227 | 6.2% |
| 9th to 12th grade, no diploma | 10,802 | 7.0% | 1,155,377 | 9.0% | 17,463,256 | 8.7% |
| H.S. graduate (inc. equivalency) | 32,696 | 21.2% | 3,868,678 | 30.3% | 57,903,353 | 29.0% |
| Some college, no degree | 30,869 | 20.0% | 2,634,397 | 20.6% | 41,175,904 | 20.6% |
| Associate degree | 12,393 | 8.0% | 1,091,583 | 8.5% | 15,021,920 | 7.5% |
| Bachelor's degree | 36,930 | 24.0% | 2,144,046 | 16.8% | 35,148,428 | 17.6% |
| Graduate or professional degree | 26,697 | 17.3% | 1,169,365 | 9.1% | 20,578,571 | 10.3% |
| Total | 154,149 | | 12,788,471 | | 199,726,659 | |

Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2006-2010

Section 2

Labor Force and Income

Topics

| | | |
|-----|------------------------------------|----|
| 2.1 | Labor Force and Employment | 11 |
| 2.2 | Unemployment | 12 |
| 2.3 | Employment by Industry | 13 |
| 2.4 | Projected Employment by Industry | 14 |
| 2.5 | Projected Employment by Occupation | 15 |
| 2.6 | Median Family Income | 16 |
| 2.7 | Average Annual Employment/Wages | 17 |
| 2.8 | Occupational Employment and Wages | 18 |
| 2.9 | Per Capita Personal Income | 19 |

Figures

| | | |
|------|--|----|
| 2-1 | Labor Force (2005-2011) | 11 |
| 2-2 | Employment (2005-2011) | 11 |
| 2-3 | Unemployment Rate (2005-2011) | 12 |
| 2-4 | Initial Claims for Unemployment Compensation (2005-2011) | 12 |
| 2-5 | Non-Agricultural Employment by Industry, Leon County (2006-2011) | 13 |
| 2-6 | Non-Agricultural Employment by Industry, Leon County (2011) | 13 |
| 2-7 | Projected Employment by Industry, Leon County (2011-2019) | 14 |
| 2-8 | Fastest Growing Occupations, Leon County (2011-2019) | 15 |
| 2-9 | Occupations Gaining the Most New Jobs, Leon County (2011-2019) | 15 |
| 2-10 | Median Family Income 2010 | 16 |
| 2-11 | Median Family Income Estimates by Fiscal Year (2008-2012) | 16 |
| 2-12 | Average Annual Employment and Wages by Ownership (2011) | 17 |
| 2-13 | Average Annual Employment & Wages, Select Private Industries (2011) | 17 |
| 2-14 | Occupational Emp. and Wages, 1,000+ Employment, Tallahassee MSA (2012) | 18 |
| 2-15 | Per Capita Income Personal (2004-2010) | 19 |
| 2-16 | Per Capita Personal Income Growth (2004-2010) | 19 |

2.1 Labor Force and Employment

Leon County's labor force and number of employed residents increased marginally between 2010 and 2011. Overall, the labor force in Leon increased by more than 13,000 between 2005 and 2011 while the number of employed Leon County residents increased by 5,500.

**Figure 2-1
Labor Force (2005-2011)**

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|----------------------------|---------|---------|---------|---------|---------|---------|---------|
| Leon County | 136,604 | 139,199 | 144,189 | 147,134 | 147,992 | 149,469 | 149,905 |
| % Change From Previous | 2.7% | 1.9% | 3.6% | 2.0% | 0.6% | 1.0% | 0.3% |
| City of Tallahassee | 86,387 | 88,342 | 91,572 | 93,935 | 94,224 | 96,491 | 96,827 |
| % Change From Previous | 5.2% | 2.3% | 3.7% | 2.6% | 0.3% | 2.4% | 0.3% |
| Unincorporated Leon County | 50,217 | 50,857 | 52,617 | 53,199 | 53,768 | 52,978 | 53,078 |
| % Change From Previous | -1.3% | 1.3% | 3.5% | 1.1% | 1.1% | -1.5% | 0.2% |

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

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

**Figure 2-2
Employment (2005-2011)**

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|----------------------------|---------|---------|---------|---------|---------|---------|---------|
| Leon County | 132,377 | 135,434 | 139,817 | 140,620 | 137,858 | 137,612 | 137,899 |
| % Change From Previous | 3.3% | 2.3% | 3.2% | 0.6% | -2.0% | -0.2% | 0.2% |
| City of Tallahassee | 83,622 | 85,887 | 88,694 | 89,703 | 87,718 | 88,805 | 88,994 |
| % Change From Previous | 6.5% | 2.7% | 3.3% | 1.1% | -2.2% | 1.2% | 0.2% |
| Unincorporated Leon County | 48,755 | 49,547 | 51,123 | 50,917 | 50,140 | 48,807 | 48,905 |
| % Change From Previous | -1.6% | 1.6% | 3.2% | -0.4% | -1.5% | -2.7% | 0.2% |

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

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

2.2 Unemployment

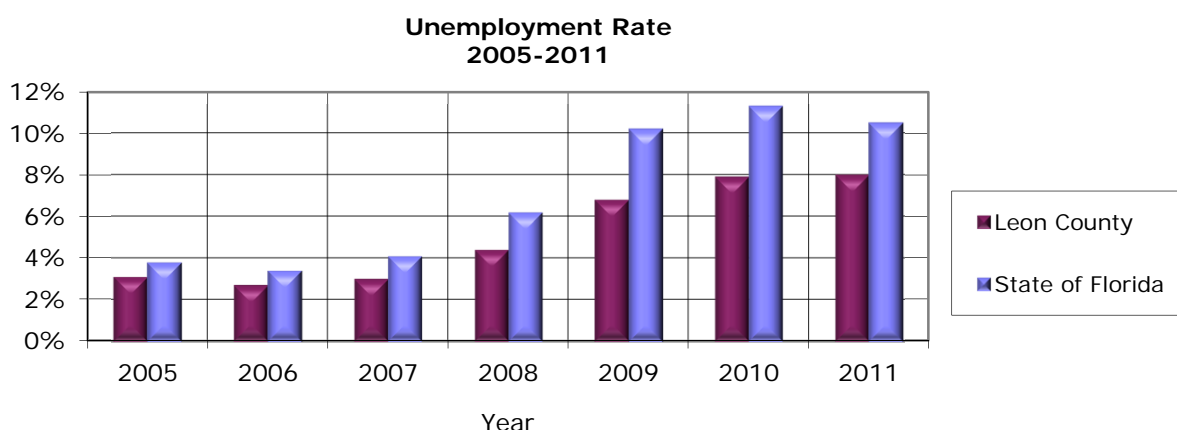
The unemployment rate in Leon County increased to 8.0% in 2011, still considerably lower than the state average of 10.5%. Initial claims for unemployment compensation decreased 11.0% in 2011 in Leon County and 20.5% for the State.

**Figure 2-3
Unemployment Rate (2005-2011)**

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|----------------------------|------|------|------|------|-------|-------|-------|
| Leon County | 3.1% | 2.7% | 3.0% | 4.4% | 6.8% | 7.9% | 8.0% |
| City of Tallahassee | 3.2% | 2.8% | 3.1% | 4.5% | 6.9% | 8.0% | 8.1% |
| Unincorporated Leon County | 2.9% | 2.6% | 2.8% | 4.3% | 6.7% | 7.9% | 7.9% |
| State of Florida | 3.8% | 3.4% | 4.1% | 6.2% | 10.2% | 11.3% | 10.5% |

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

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



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

**Figure 2-4
Initial Claims for Unemployment Compensation (2005-2011)**

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|------------------------|---------|---------|---------|-----------|-----------|-----------|---------|
| Leon County | 5,932 | 5,622 | 5,922 | 9,168 | 12,313 | 11,874 | 10,570 |
| % Change from Previous | -5.1% | -5.2% | 5.3% | 54.8% | 34.3% | -3.6% | -11.0% |
| Florida | 542,845 | 493,164 | 638,291 | 1,022,216 | 1,397,484 | 1,236,598 | 983,692 |
| % Change from Previous | -17.6% | -9.2% | 29.4% | 60.1% | 36.7% | -11.5% | -20.5% |

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

2.3 Employment by Industry

Between 2006 and 2011, non-agricultural employment in Leon County decreased on average 1.2% per year. Education & Health Services exhibited the strongest growth (up 3.0% per year). Leisure & Hospitality, Local Government and Federal Government exhibited small annual average gains while all other industries experienced declining average annual employment during the period.

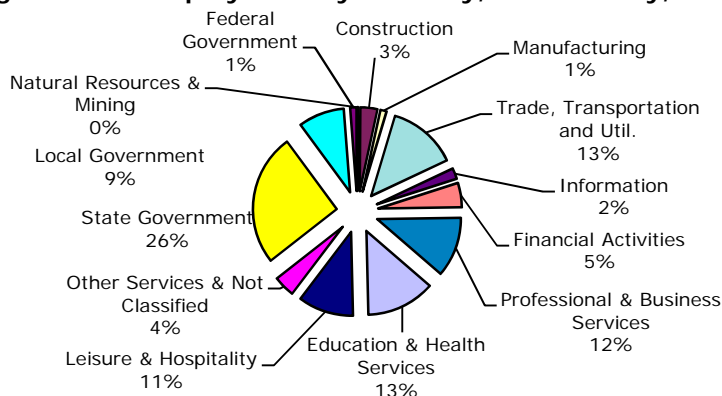
**Figure 2-5
Non-Agricultural Employment by Industry, Leon County (2006-2011)**

| | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 (p) | Avg. Annual Change |
|----------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------------|
| Natural Resources & Mining | 235 | 224 | 198 | 151 | 174 | 153 | -11.2% |
| Construction | 7,778 | 7,258 | 6,489 | 5,339 | 4,794 | 4,541 | -15.3% |
| Manufacturing | 2,221 | 2,319 | 2,146 | 1,964 | 1,934 | 1,695 | -6.3% |
| Trade, Transportation and Util. | 21,202 | 20,741 | 19,848 | 18,506 | 18,271 | 18,384 | -3.1% |
| Information | 3,568 | 3,686 | 3,726 | 3,098 | 2,793 | 2,863 | -5.0% |
| Financial Activities | 7,359 | 7,323 | 7,103 | 6,639 | 6,393 | 6,486 | -2.7% |
| Professional & Business Services | 17,308 | 16,986 | 16,778 | 16,085 | 15,822 | 15,954 | -1.7% |
| Education & Health Services | 15,558 | 16,210 | 16,920 | 17,569 | 17,857 | 18,230 | 3.0% |
| Leisure & Hospitality | 14,450 | 15,073 | 14,757 | 14,622 | 14,468 | 14,756 | 0.4% |
| Other Services & Not Classified | 6,222 | 6,249 | 6,194 | 5,807 | 5,770 | 5,657 | -2.0% |
| State Government | 36,518 | 35,983 | 35,213 | 35,148 | 35,772 | 35,075 | -0.8% |
| Local Government | 12,087 | 12,309 | 12,173 | 12,124 | 11,997 | 12,212 | 0.2% |
| Federal Government | 1,679 | 1,656 | 1,717 | 1,732 | 1,823 | 1,692 | 0.2% |
| Total | 146,185 | 146,017 | 143,262 | 138,784 | 137,868 | 137,698 | -1.2% |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, QCEW - Quarterly Census of Employment and Wages (ES-202)
(p) 2011 preliminary

**Figure 2-6
Non-Agricultural Employment by Industry, Leon County (2011)**

Non-Agricultural Employment by Industry, Leon County, 2010



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

2.4 Projected Employment by Industry

In Leon County, Professional and Business Services and Education and Health Services are projected to create the most jobs while Construction is expected to experience the largest annual percentage growth in employment by major industry between 2011 and 2019.

Figure 2-7
Projected Employment by Industry, Leon County (2011-2019)

| Industry | 2011 Employment | 2019 Employment | Total Employment Annual Change | Annual Percentage Change |
|--|----------------------------|----------------------------|---|---|
| Total All Industries | 162,548 | 177,809 | 1,908 | 1.2% |
| Construction | 4,775 | 6,095 | 165 | 3.5% |
| Leisure and Hospitality | 14,837 | 17,331 | 312 | 2.1% |
| Financial Activities | 6,524 | 7,595 | 134 | 2.1% |
| Professional and Business Services | 17,037 | 19,802 | 346 | 2.0% |
| Education and Health Services | 18,551 | 21,311 | 345 | 1.9% |
| Retail Trade | 15,125 | 17,331 | 276 | 1.8% |
| Other Services (Except Government) | 9,212 | 10,356 | 143 | 1.6% |
| Wholesale Trade | 2,542 | 2,832 | 36 | 1.4% |
| Information | 2,817 | 3,086 | 34 | 1.2% |
| Transportation and Warehousing | 1,033 | 1,103 | 9 | 0.9% |
| Self-Employed & Unpaid Family Workers | 13,001 | 13,549 | 68 | 0.5% |
| Agriculture, Forestry, Fishing and Hunting | 154 | 160 | 1 | 0.5% |
| Local Government | 12,129 | 12,528 | 50 | 0.4% |
| State Government | 41,109 | 41,351 | 30 | 0.1% |
| Manufacturing | 1,931 | 1,769 | -20 | -1.1% |
| Federal Government | 1,675 | 1,505 | -21 | -1.3% |

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

Note: Because most industries experienced job declines in the economic downturn that began in 2007, some of the job growth projected in this forecast includes the recapturing of jobs lost since that time.

2.5 Projected Employment by Occupation

The top two occupations by projected percentage annual growth in Leon County are in the industrial field. By total employment change, service occupations (Food Prep. and Serving Workers, Retail Salespersons and Waiters and Waitresses) account for the top three occupations projected to add the most jobs by 2019.

Figure 2-8
Fastest Growing Occupations, Leon County (2011-2019)

| Industry | 2011 Emp. | 2019 Emp. | Total Emp. Change | Annual Percentage Change |
|---|--------------|--------------|----------------------|--------------------------------|
| Helpers - Plumbers, Pipefitters, and Steamfitters | 111 | 160 | 49 | 5.5% |
| Heating A/C, Refrigeration Mechanics & Installers | 407 | 580 | 173 | 5.3% |
| Fitness Trainers and Aerobics Instructors | 239 | 408 | 169 | 4.9% |
| Home Health Aides | 412 | 569 | 157 | 4.8% |
| Cost Estimators | 212 | 288 | 76 | 4.5% |
| Computer Software Engineers, Applications | 429 | 574 | 145 | 4.2% |
| Network Systems & Data Communications Analysts | 1,370 | 1,812 | 442 | 4.0% |
| Pharmacy Technicians | 330 | 432 | 102 | 3.9% |
| Bartenders | 211 | 276 | 65 | 3.9% |
| Cement Masons and Concrete Finishers | 135 | 173 | 38 | 3.5% |
| Landscaping and Groundskeeping Workers | 957 | 1,192 | 235 | 3.1% |
| Security and Fire Alarms Systems Installers | 131 | 163 | 32 | 3.1% |
| Helpers-Installation, Maintenance, & Repair Workers | 140 | 173 | 33 | 3.0% |

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

Note: Because most industries experienced job declines in the economic downturn that began in 2007, some of the occupational job growth projected in this forecast includes the recapturing of jobs lost since that time.

Figure 2-9
Occupations Gaining the Most New Jobs, Leon County (2011-2019)

| Industry | 2011 Emp. | 2019 Emp. | Total Emp. Change | Annual Percentage Change |
|---|--------------|--------------|----------------------|--------------------------------|
| Food Prep. & Serving Workers, Inc. Fast Food | 4,337 | 5,242 | 905 | 2.6% |
| Retail Salespersons | 4,132 | 4,706 | 574 | 1.7% |
| Waiters and Waitresses | 3,125 | 3,636 | 511 | 2.0% |
| Network Systems and Data Communications Analyst | 1,349 | 1,834 | 485 | 4.5% |
| Accountants and Auditors | 3,258 | 3,735 | 477 | 1.8% |
| Office Clerks, General | 3,046 | 3,344 | 298 | 1.2% |
| Customer Service Representatives | 1,416 | 1,694 | 278 | 2.5% |
| Bookkeeping, Accounting and Auditing Clerks | 2,285 | 2,531 | 246 | 1.4% |
| Home Health Aides | 408 | 633 | 225 | 6.9% |
| Landscaping and Groundskeeping Workers | 1,011 | 1,277 | 266 | 2.7% |

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

Note: Because most industries experienced job declines in the economic downturn that began in 2007, some of the occupational job growth projected in this forecast includes the recapturing of jobs lost since that time.

2.6 Median Family Income

The median family income in 2010 in Leon County was \$66,157 according to the Census Bureau's 2006-2010 American Community Survey.

Figure 2-10
Median Family Income 2010

| | 2010 |
|---------------------|-------------|
| Leon County | \$66,157 |
| Tallahassee MSA* | \$61,311 |
| City of Tallahassee | \$58,516 |
| Florida | \$57,204 |

Source: U.S. Census Bureau, 2006-2010 American Community Survey

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

Figure 2-11
Median Family Income Estimates by Fiscal Year (2008-2012)

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|--------------|-------------|-------------|-------------|-------------|-------------|
| Tallahassee* | \$62,100 | \$63,600 | \$63,700 | \$63,400 | \$64,300 |
| Florida | \$57,200 | \$58,800 | \$59,400 | \$56,200 | \$57,000 |

**Note: HUD's Core-Based Statistical Area (CBSA) definition for median family income estimates for Tallahassee includes 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 2011 (preliminary) was \$39,660, 6.3% below the state average wage of \$42,311. The annual average state government wage was 5.6% higher in Leon County compared to the state average while the local government wage in Leon County was 11.8% lower than the state average.

Figure 2-12
Average Annual Employment and Wages by Ownership (2011)

| | Average Annual Reporting Units | Average Annual Employment | Average Annual Wage |
|--------------------|--------------------------------|---------------------------|---------------------|
| Leon County | | | |
| All Ownerships | 8,216 | 137,708 | \$39,660 |
| Private Ownerships | 7,938 | 88,731 | \$36,737 |
| Federal Government | 51 | 1,692 | \$69,719 |
| State Government | 203 | 35,075 | \$45,538 |
| Local Government | 24 | 12,212 | \$39,851 |
| Florida | | | |
| All Ownerships | 599,648 | 7,195,882 | \$42,311 |
| Private Ownerships | 592,670 | 6,151,087 | \$41,375 |
| Federal Government | 2,178 | 133,992 | \$68,518 |
| State Government | 3,219 | 184,194 | \$43,141 |
| Local Government | 1,581 | 726,609 | \$45,193 |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Quarterly Census of Employment & Wages (ES-202)
(p) 2011 preliminary

Figure 2-13
Average Annual Employment & Wages, Select Private Industries (2011)

| | Average Annual Reporting Units | Average Annual Employment | Average Annual Wage |
|------------------------------------|--------------------------------|---------------------------|---------------------|
| Leon County | | | |
| Professional and Business Services | 1,954 | 15,954 | \$52,327 |
| Financial Activities | 878 | 6,486 | \$50,323 |
| Construction | 761 | 4,541 | \$36,113 |
| Information | 187 | 2,863 | \$48,163 |
| Manufacturing | 122 | 1,695 | \$50,482 |
| Florida | | | |
| Professional and Business Services | 134,720 | 1,056,717 | \$50,898 |
| Financial Activities | 63,286 | 476,719 | \$59,463 |
| Construction | 56,858 | 339,069 | \$40,933 |
| Information | 9,970 | 135,376 | \$64,371 |
| Manufacturing | 17,972 | 311,305 | \$52,373 |

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Quarterly Census of Employment & Wages (ES-202)
(p) 2011 preliminary

2.8 Occupational Employment and Wages

The 2012 estimated average hourly wage for all occupations in the Tallahassee MSA is \$20.19 with the average wage being \$25.68 per hour for experienced workers in their occupation.

Figure 2-14
Occupational Emp. and Wages, 1,000+ Employment,
Tallahassee MSA (2012)

| Occupational Title | 2011 Emp. | Hourly Wage (2012 Wage Estimates in dollars) | | | |
|--|--------------|---|----------|----------|----------|
| | | Mean | Median | Entry* | Exp.** |
| Total All Occupations | 158,470 | \$20.19 | \$15.51 | \$9.19 | \$25.68 |
| Retail Salespersons | 5,220 | \$12.07 | \$10.12 | \$8.25 | \$13.98 |
| Management Analysts | 4,750 | \$27.60 | \$23.02 | \$18.03 | \$32.39 |
| Comb. Food Pre. & Serving Workers, Inc. Fast Food | 4,310 | \$8.58 | \$8.62 | \$8.22 | \$8.77 |
| Cashiers | 4,070 | \$8.86 | \$8.78 | \$8.28 | \$9.15 |
| Office Clerks, General | 3,840 | \$11.33 | \$10.65 | \$8.33 | \$12.83 |
| Secretaries, Except Legal, Medical, and Executive | 3,410 | \$14.53 | \$13.85 | \$10.17 | \$16.72 |
| Waiters and Waitresses | 3,220 | \$8.98 | \$8.74 | \$8.27 | \$9.34 |
| Registered Nurses | 3,180 | \$28.99 | \$27.53 | \$21.97 | \$32.51 |
| Janitors and Cleaners, Ex.Maids and Hskping. | 2,850 | \$9.46 | \$9.00 | \$8.24 | \$10.06 |
| Executive Secretaries and Administrative Assistants | 2,840 | \$17.50 | \$16.27 | \$12.82 | \$19.83 |
| Accountants and Auditors | 2,750 | \$25.22 | \$21.77 | \$15.16 | \$30.25 |
| Lawyers | 2,150 | \$46.98 | \$39.84 | \$27.44 | \$56.76 |
| Business Operations Specialists, All Other | 2,100 | \$29.06 | \$27.58 | \$17.95 | \$34.61 |
| Bookkeeping, Accounting, and Auditing Clerks | 2,030 | \$15.86 | \$15.38 | \$11.40 | \$18.09 |
| Customer Service Representatives | 1,980 | \$14.01 | \$13.08 | \$9.79 | \$16.12 |
| Stock Clerks and Order Fillers | 1,960 | \$10.56 | \$10.02 | \$8.29 | \$11.69 |
| Receptionists and Information Clerks | 1,600 | \$12.08 | \$11.80 | \$9.17 | \$13.54 |
| General and Operations Managers | 1,530 | \$50.94 | \$44.64 | \$25.11 | \$63.86 |
| First-Line Supervisors/Mgrs of Retail Sales Workers | 1,480 | \$19.29 | \$17.42 | \$12.22 | \$22.83 |
| Comp. Ofcrs., Ex. Ag., Cons., Hlth., Safety & Trans. | 1,440 | \$18.29 | \$16.07 | \$13.06 | \$20.89 |
| Teacher Assistants | 1,390 | \$25,511 | \$24,136 | \$19,209 | \$28,661 |
| First-Line Supers./Mgrs. of Ofc. & Admin. Sup. Wkrs. | 1,350 | \$22.02 | \$21.29 | \$14.25 | \$25.92 |
| Elementary School Teachers, Except Spec. Education | 1,330 | N/R | N/R | N/R | N/R |
| Nursing Aides, Orderlies, and Attendants | 1,280 | \$11.26 | \$10.95 | \$9.78 | \$11.98 |
| Maids and Housekeeping Cleaners | 1,280 | \$8.61 | \$8.64 | \$8.14 | \$8.84 |
| Maintenance and Repair Workers, General | 1,260 | \$15.88 | \$15.35 | \$11.48 | \$18.09 |
| All Other Teachers, Primary, Secondary, and Adult | 1,190 | \$35,485 | \$27,814 | \$20,153 | \$43,152 |
| Computer Support Specialists | 1,140 | \$18.92 | \$17.93 | \$13.33 | \$21.72 |
| Info. Sec. Analysts, Web Devl., & Comp. Ntwrk. Arch | 1,090 | \$27.17 | \$25.16 | \$19.89 | \$30.82 |
| Sales Reps., Whlsle. & Mfg. Exc. Tech. & Sci. Prods. | 1,080 | \$26.51 | \$23.78 | \$14.28 | \$32.63 |

* *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 Personal Income

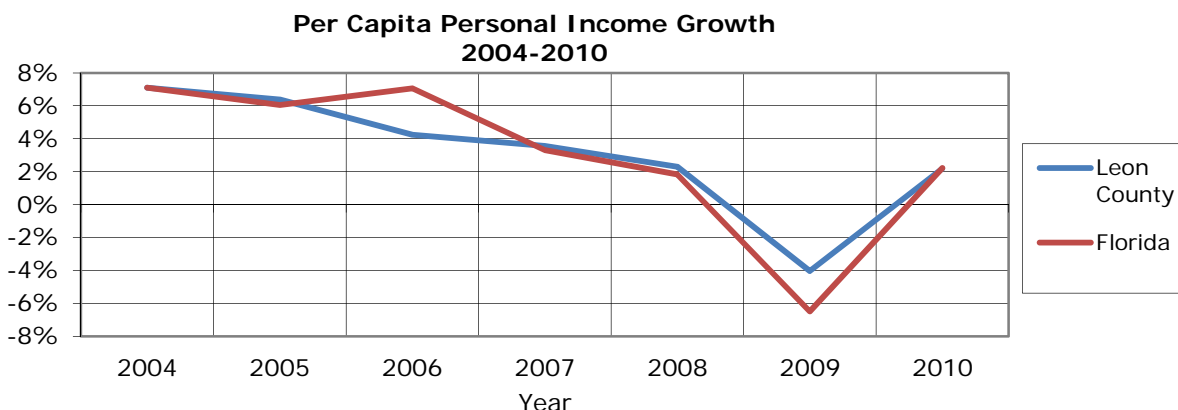
Per capita personal increased 2.2% in Leon County in 2010 and was 91.9% of the per capita income for the state. Since per capita personal income is calculated as the personal income of a given area divided by the resident population of the area, per capita personal income tends to be lower in Leon County due to the large number of college students in our community.

Figure 2-15
Per Capita Personal Income (2004-2010)

| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|------------------------|----------|----------|----------|----------|----------|----------|----------|
| Leon County | \$30,498 | \$32,446 | \$33,820 | \$35,021 | \$35,827 | \$34,377 | \$35,129 |
| % Change From Previous | 7.1% | 6.4% | 4.2% | 3.6% | 2.3% | -4.0% | 2.2% |
| Florida | \$33,463 | \$35,489 | \$37,996 | \$39,256 | \$39,978 | \$37,382 | \$38,210 |
| % Change From Previous | 7.1% | 6.1% | 7.1% | 3.3% | 1.8% | -6.5% | 2.2% |

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

Figure 2-16
Per Capita Personal Income Growth (2004-2010)



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

Section 3

Economic Factors

Topics

| | | |
|-----|---|----|
| 3.1 | Taxable Sales | 21 |
| 3.2 | FDIC Summary of Deposits | 22 |
| 3.3 | Annual Visitor Trends | 23 |
| 3.4 | Florida Price Level Index | 24 |
| 3.5 | Gross Domestic Produce by Metro. Area | 25 |
| 3.6 | Consumer Price Index (CPI-U) | 26 |
| 3.7 | Tallahassee Regional Airport Traffic Statistics | 27 |

Figures

| | | |
|------|---|----|
| 3-1 | Annual Taxable Sales, Tallahassee MSA and Florida (2002-2011) | 21 |
| 3-2 | Annual Taxable Sales, Tallahassee MSA by Category (2008-2011) | 21 |
| 3-3 | FDIC Summary of Deposits (2000-2011) | 22 |
| 3-4 | FDIC Summary of Deposits, Leon County (2000-2011) | 22 |
| 3-5 | Annual Visitor Trends-Person Visits (2002-2011) | 23 |
| 3-6 | Annual Visitor Trends-Annual Visitor Spending (2002-2011) | 23 |
| 3-7 | Florida Price Level Index (2007-2011) | 24 |
| 3-8 | Gross domestic Product by Metro. Area, US\$, Billions (2005-2010) | 25 |
| 3-9 | Consumer Price Index for all Urban Consumers (CPI-U, 2004-2011) | 26 |
| 3-10 | Annual Change in the Consumer Price Index (CPI-U, 2004-2011) | 26 |
| 3-11 | Tallahassee Regional Airport Traffic Statistics (2005-2011) | 27 |
| 3-12 | Total Passengers at Tallahassee Regional Airport (2005-2011) | 27 |

3.1 Taxable Sales

Taxable sales data for various Metropolitan Statistical Areas (MSA's) are popularly used as one indicator of regional economic activity. These data are derived from sales tax returns remitted to the state Department of Revenue each month. The overall level of taxable sales increased 1.1% in the Tallahassee MSA in 2011, reversing four years of declining taxable sales. Taxable sales for the State of Florida were up 4.9% in 2011 compared with 2010. By category, the two categories in the Tallahassee MSA that saw the greatest increase in taxable sales between 2010 and 2011 were Autos and Accessories, 3.8% and Tourism & Recreation, 2.6%. Two categories saw a decrease in taxable sales between 2010 and 2011: Building Investment, 6.6% and Consumer Durables, 1.0%. It is estimated that taxable sales comprise 40-45% of all retail sales.

Figure 3-1
Annual Taxable Sales, Tallahassee MSA and Florida (2002-2011)

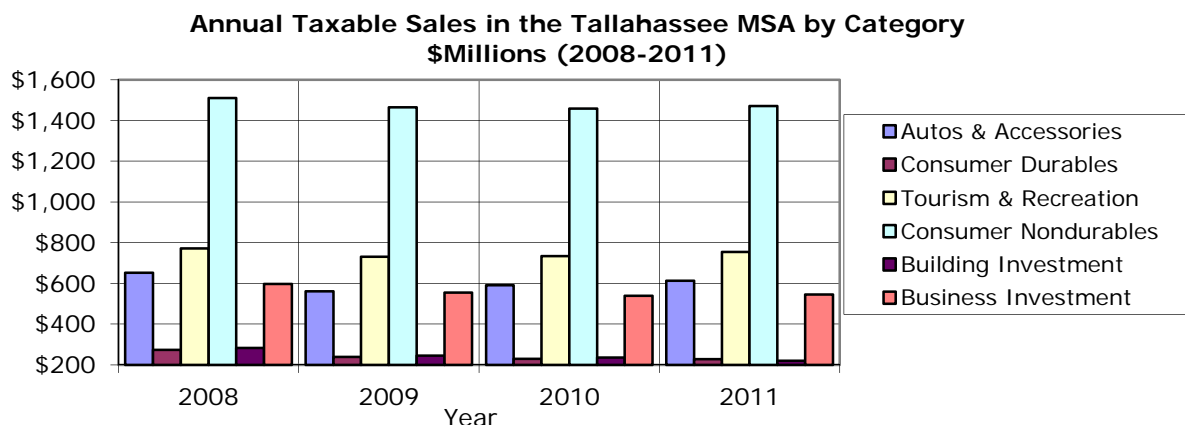
| Year | Tallahassee MSA | Change from Previous Year | State of Florida | Change from Previous Year |
|------|-----------------|---------------------------|------------------|---------------------------|
| 2002 | \$3,553.1 | 1.6% | \$252,910.9 | -0.9% |
| 2003 | \$3,768.5 | 6.1% | \$266,335.7 | 5.3% |
| 2004 | \$3,995.5 | 6.0% | \$294,110.3 | 10.4% |
| 2005 | \$4,307.8 | 7.8% | \$327,787.6 | 11.5% |
| 2006 | \$4,437.9 | 3.0% | \$343,300.1 | 4.7% |
| 2007 | \$4,395.5 | -1.0% | \$329,168.7 | -4.1% |
| 2008 | \$4,088.0 | -7.0% | \$303,900.9 | -7.7% |
| 2009 | \$3,795.2 | -7.2% | \$276,339.4 | -9.1% |
| 2010 | \$3,787.1 | -0.2% | \$283,130.1 | 2.5% |
| 2011 | \$3,828.7 | 1.1% | \$296,997.6 | 4.9% |

Note: Taxable sales in \$Millions of dollars.

Note: The Tallahassee MSA includes Leon, Gadsden, Jefferson & Wakulla County

Source: Florida Department of Revenue

Figure 3-2
Annual Taxable Sales, Tallahassee MSA by Category (2008-2011)



Note: Tallahassee MSA includes Leon, Gadsden, Jefferson & Wakulla County

Source: Florida Department of Revenue

3.2 FDIC Summary of Deposits

More than \$4.9 billion in deposits were held in Leon County in FDIC-insured institutions as of June 30, 2011. Total Leon County deposits declined 4.3% between 2010 and 2011. The Summary of Deposits (SOD) is the annual survey of branch office deposits as of June 30 for all FDIC-insured institutions, including insured U.S. branches of foreign banks

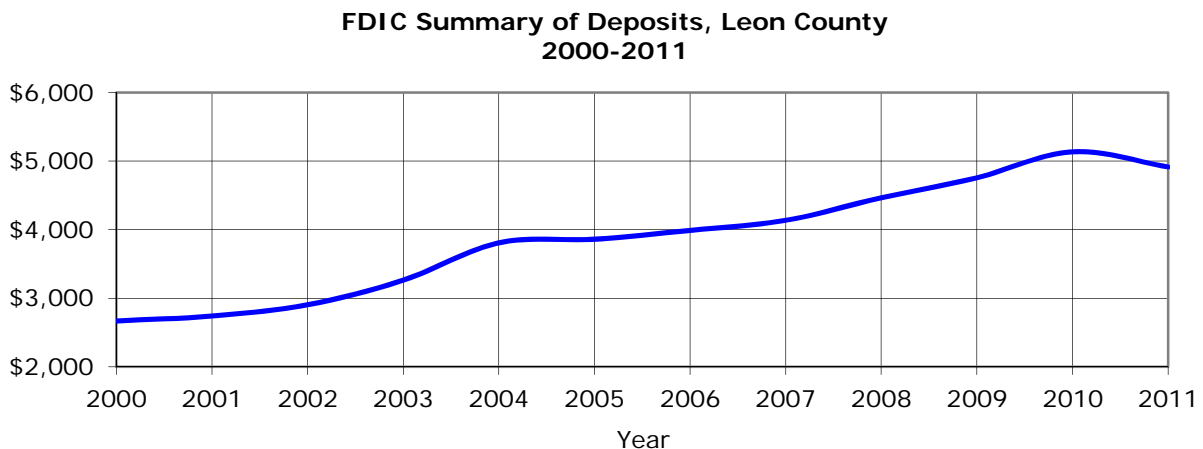
Figure 3-3
FDIC Summary of Deposits (2000-2011)

| As of June 30 | Leon County - All Institutions | | | Florida - All Institutions | | |
|------------------|--------------------------------|---------|----------|----------------------------|---------|-----------|
| | Institutions | Offices | Deposits | Institutions | Offices | Deposits |
| 2000 | 14 | 69 | \$2,669 | 348 | 4,661 | \$207,852 |
| 2001 | 13 | 68 | \$2,740 | 349 | 4,667 | \$222,797 |
| 2002 | 14 | 67 | \$2,905 | 349 | 4,626 | \$242,821 |
| 2003 | 14 | 69 | \$3,263 | 352 | 4,732 | \$268,174 |
| 2004 | 14 | 76 | \$3,809 | 353 | 4,897 | \$300,961 |
| 2005 | 14 | 80 | \$3,860 | 349 | 5,081 | \$342,821 |
| 2006 | 14 | 81 | \$3,989 | 365 | 5,310 | \$363,415 |
| 2007 | 14 | 83 | \$4,135 | 376 | 5,600 | \$373,711 |
| 2008 | 19 | 96 | \$4,464 | 381 | 5,772 | \$380,281 |
| 2009 | 20 | 96 | \$4,755 | 368 | 5,820 | \$400,979 |
| 2010 | 19 | 95 | \$5,136 | 339 | 5,666 | \$409,894 |
| 2011 | 18 | 92 | \$4,914 | 313 | 5,615 | \$411,526 |

Note: Deposits in \$Millions of dollars

Source: FDIC, Summary of Deposits

Figure 3-4
FDIC Summary of Deposits, Leon County (2000-2011)



Note: Deposits in \$Millions of dollars

Source: FDIC, Summary of Deposits

3.3 Annual Visitor Trends

In calendar year 2011, nearly 2.6 million people (person visits) visited Leon County, up 13.2% from calendar year 2010. Visitor spending totaled \$577.2 million in 2011, 11.4% higher than total non-inflation adjusted visitor spending in 2010.

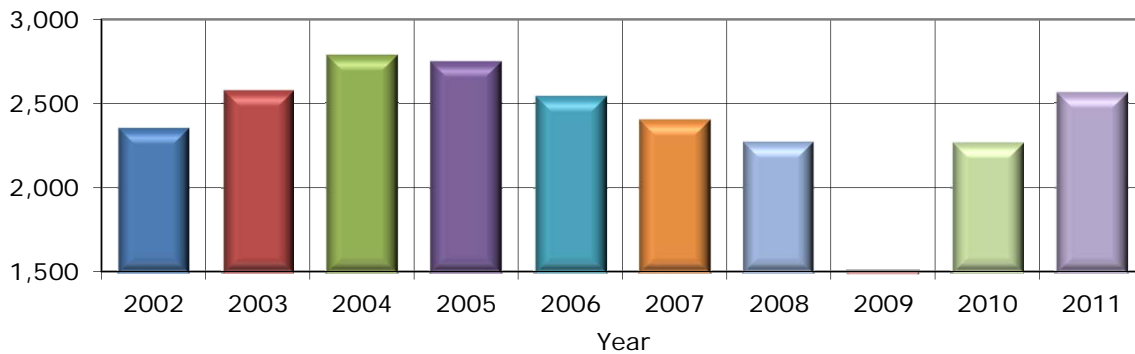
**Figure 3-5
Annual Visitor Trends-Person Visits (2002-2011)**

| | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---------------|-------|-------|-------|-------|-------|-------|-------|------|-------|-------|
| Person Visits | 2,352 | 2,579 | 2,784 | 2,751 | 2,545 | 2,402 | 2,270 | n/a | 2,266 | 2,564 |

Note: Data in Thousands

Source: Dr. Mark A. Bonn, Ph.D., The Bonn Marketing Research Group, Inc.

**Annual Visitor Trends (Person Visits in Thousands)
2002-2011**



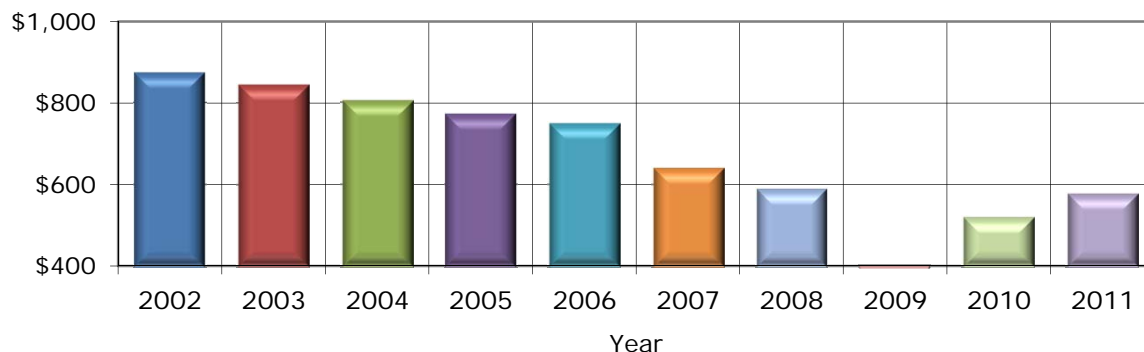
**Figure 3-6
Annual Visitor Trends-Annual Visitor Spending (2002-2011)**

| | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|------------------|-------|-------|-------|-------|-------|-------|-------|------|-------|-------|
| Visitor Spending | \$874 | \$845 | \$805 | \$772 | \$749 | \$641 | \$587 | n/a | \$518 | \$577 |

Note: Data in Millions

Source: Dr. Mark A. Bonn, Ph.D., The Bonn Marketing Research Group, Inc.

**Annual Visitor Trends (Visitor Spending in Millions)
2002-2011**



3.4 Florida Price Level Index

The Florida Price Level Index (FPLI) was established by the Legislature as the basis for the District Cost Differential (DCD) in the Florida Education Finance Program. In this role, the FPLI is used to represent the costs of hiring equally qualified personnel across school districts. Note that this is a cross-sectional measure that compares the relative wage levels among Florida's 67 counties and is not designed to measure inflation from one year to the next.

Figure 3-7
Florida Price Level Index (2007-2011)

| County | 2007 | 2008 | 2009 | 2010 | 2011 |
|---------------|-------------|-------------|-------------|-------------|-------------|
| Leon | 94.33 | 94.07 | 93.68 | 94.39 | 94.08 |
| Gadsden | 91.84 | 91.59 | 92.29 | 94.05 | 93.74 |
| Jefferson | 91.59 | 91.34 | 90.97 | 92.50 | 91.38 |
| Wakulla | 91.90 | 91.64 | 91.27 | 91.96 | 92.94 |

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 2011, counties with index values above 101.18 contain 48% of the state's population.

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

3.5 Gross Domestic Product by Metro. Area

In 2010, the Tallahassee Metropolitan Area's (MSA) gross domestic product was \$13.4 billion, up \$0.2 billion from 2009. Real U.S. GDP by metropolitan area increased 2.5% in 2010 after declining 2.5% in 2009. The economic growth was widespread as real GDP increased in 304 of 366 (83%) metropolitan statistical areas, led by national growth in durable-goods manufacturing, trade and financial activities.

Figure 3-8
Gross Domestic Product by Metro. Area, US\$, Billions (2005-2010)

| City | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2010 MSA Ranking (out of 366 MSAs) |
|--------------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------------------------------|
| Tampa | 102.8 | 110.1 | 114.1 | 112.3 | 111.9 | 113.7 | 23 |
| Orlando | 91.2 | 98.7 | 104.3 | 103.9 | 101.4 | 104.1 | 29 |
| Jacksonville | 53.2 | 58.3 | 60.2 | 59.1 | 58.6 | 60.3 | 46 |
| Pensacola | 12.4 | 13.3 | 13.8 | 13.7 | 13.8 | 14.2 | 138 |
| Tallahassee | 11.5 | 12.2 | 13.1 | 13.1 | 13.2 | 13.4 | 143 |
| Gainesville | 9.4 | 9.0 | 9.8 | 9.9 | 10.1 | 10.4 | 168 |
| Panama City | 5.8 | 6.1 | 6.4 | 6.5 | 6.5 | 6.8 | 223 |

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

3.6 Consumer Price Index (CPI-U)

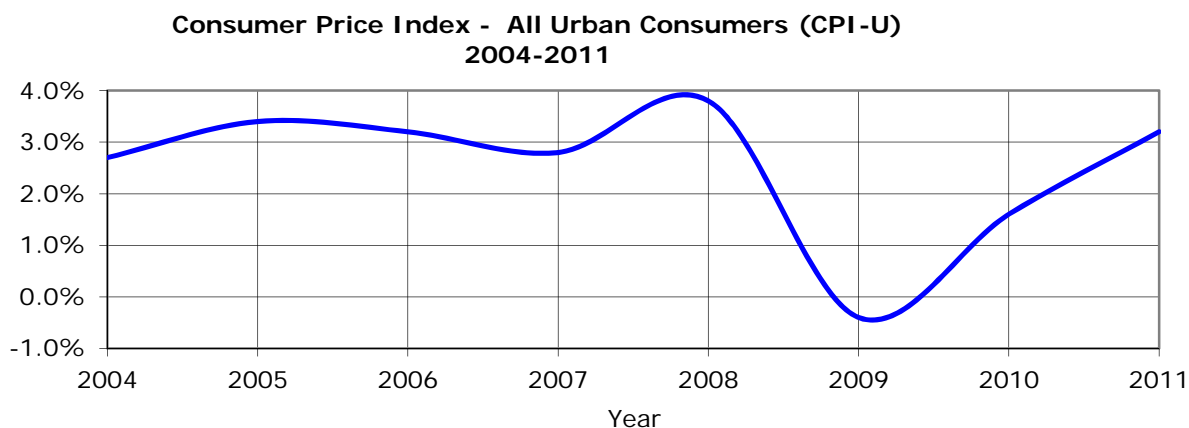
The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 3.2% in 2011 following a 1.6% increase in 2010.

Figure 3-9
Consumer Price Index for all Urban Consumers (CPI-U, 2004-2011)

| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|------------------------|-------|-------|-------|-------|-------|-------|-------|-------|
| U.S. City Average | 188.9 | 195.3 | 201.6 | 207.3 | 215.3 | 214.5 | 218.1 | 224.9 |
| % Change from Previous | 2.7% | 3.4% | 3.2% | 2.8% | 3.8% | -0.4% | 1.6% | 3.2% |

Source: U.S. Bureau of Labor Statistics

Figure 3-10
Annual Change in the Consumer Price Index (CPI-U, 2004-2011)



Source: U.S. Bureau of Labor Statistics

3.7 Airport Traffic Statistics

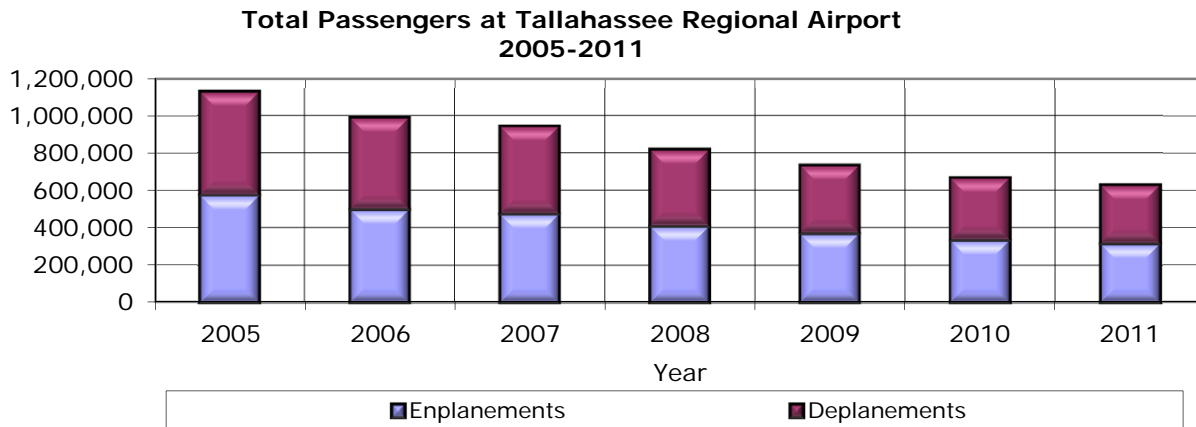
Passenger traffic at Tallahassee Regional Airport was off 6% in 2011 compared with 2010 levels marking a seventh straight annual decline in the number of total passengers.

Figure 3-11
Tallahassee Regional Airport Traffic Statistics (2005-2011)

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|------------------|-----------|---------|---------|---------|---------|---------|---------|
| Enplanements | 576,104 | 501,158 | 475,612 | 411,870 | 371,106 | 336,676 | 318,079 |
| Deplanements | 553,843 | 492,702 | 471,553 | 409,846 | 366,579 | 334,430 | 315,738 |
| Total Passengers | 1,129,947 | 993,860 | 947,165 | 821,716 | 737,685 | 671,106 | 633,817 |

Source: City of Tallahassee, Aviation Department

Figure 3-12
Total Passengers at Tallahassee Regional Airport (2005-2011)



Source: City of Tallahassee, Aviation Department

Section 4

Education

Topics

| | | |
|-----|--|----|
| 4.1 | Higher Education Institutions Enrollment | 29 |
| 4.2 | Leon County Public Schools Statistics | 30 |
| 4.3 | Leon County Public School Grades | 31 |
| 4.4 | SAT and ACT Results | 32 |

Figures

| | | |
|-----|---|----|
| 4-1 | Fall Enrollment at Area Institutions of Higher Learning (1960-2011) | 29 |
| 4-2 | Fall Enrollment at Area Institutions of Higher Learning (1970-2011) | 29 |
| 4-3 | Leon County Public School Enrollment, K-12 (1960-61-2011-12) | 30 |
| 4-4 | Leon County Public School Dropout Statistics, Grades 9-12 (1996-97-2010-11) | 30 |
| 4-5 | Leon County Public School Grades, K-12 (2007-2012) | 31 |
| 4-6 | SAT Mean Results, Total (2003-04-2011-12) | 32 |
| 4-7 | ACT Mean Results, Total (2003-04-2011-12) | 32 |

4.1 Higher Education Institutions Enrollment

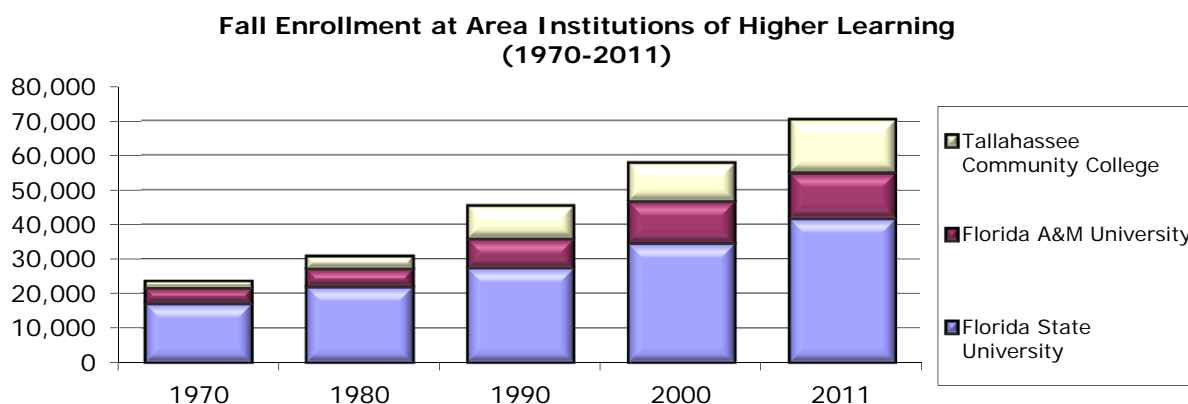
More than 70,000 students were enrolled in the fall semester 2011 at the three largest institutions for higher learning in Leon County. Total enrollment at the three schools has nearly tripled since 1970, including increasing nearly 2% per year since 2000.

Figure 4-1
Fall Enrollment at area Institutions of Higher Learning (1960-2011)

| Year | Florida State University | Florida A&M University | Tallahassee Community College | Total Enrollment |
|------|--------------------------|------------------------|-------------------------------|------------------|
| 1960 | 9,019 | 2,961 | --- | 11,980 |
| 1970 | 17,188 | 4,500 | 2,100 | 23,788 |
| 1980 | 21,965 | 5,246 | 3,663 | 30,874 |
| 1985 | 21,474 | 4,919 | 5,289 | 31,682 |
| 1990 | 27,427 | 8,379 | 9,679 | 45,485 |
| 1995 | 30,268 | 10,277 | 10,101 | 50,646 |
| 2000 | 34,485 | 12,161 | 11,207 | 57,853 |
| 2001 | 35,472 | 12,349 | 11,567 | 59,388 |
| 2002 | 36,720 | 12,468 | 11,968 | 61,156 |
| 2003 | 37,328 | 13,023 | 12,572 | 62,923 |
| 2004 | 38,886 | 13,070 | 12,784 | 64,740 |
| 2005 | 39,652 | 12,176 | 13,439 | 65,267 |
| 2006 | 40,474 | 11,913 | 13,526 | 65,913 |
| 2007 | 41,065 | 11,567 | 13,891 | 66,523 |
| 2008 | 39,136 | 11,848 | 14,024 | 65,008 |
| 2009 | 40,255 | 12,261 | 14,497 | 67,013 |
| 2010 | 40,838 | 13,277 | 14,770 | 68,885 |
| 2011 | 41,710 | 13,204 | 15,410 | 70,324 |

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

Figure 4-2
Fall Enrollment at Area Institutions of Higher Learning (1970-2011)



Source: Florida Department of Education, State of Florida Student Database Reports
Tallahassee-Leon County Planning Department

4.2 Leon County Public Schools Statistics

Leon County public school enrollment (K-12) decreased by 0.4% in the 2011-12 school year. The dropout rate for grades 9-12 increased to 2.7% in the 2010-2011 school year.

Figure 4-3
Leon County Public School Enrollment, K-12 (1960-61-2011-12)

| Year | Enrollment |
|---------|------------|
| 1960-61 | 14,959 |
| 1970-71 | 20,182 |
| 1980-81 | 21,632 |
| 1985-86 | 23,445 |
| 1990-91 | 26,869 |
| 1995-96 | 30,348 |
| 2000-01 | 30,958 |
| 2005-06 | 31,474 |
| 2006-07 | 31,626 |
| 2007-08 | 31,908 |
| 2008-09 | 31,877 |
| 2009-10 | 31,689 |
| 2010-11 | 32,269 |
| 2011-12 | 32,130 |

Source: Leon County Public Schools, Program Monitoring & Evaluation Services

Figure 4-4
Leon County Public School Dropout Statistics, Grades 9-12 (1996-97-2010-11)

| 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% |
| 2005-06 | 2.6% |
| 2006-07 | 4.5% |
| 2007-08 | 2.0% |
| 2008-09 | 3.5% |
| 2009-10 | 0.8% |
| 2010-11 | 2.7% |

Source: Leon County Public Schools, Program Monitoring & Evaluation Services

4.3 Leon County Public School Grades

Seventy-six percent of Leon County Schools received an A or B grade in the 2010-11 school year.

Figure 4-5
Leon County Public School Grades, K-12 (2007-2012)

| School Name | 2012 Grade | 2011 Grade | 2010 Grade | 2009 Grade | 2008 Grade | 2007 Grade |
|--|---------------|---------------|---------------|---------------|---------------|---------------|
| Amos P. Godby High School | Pending | C | B | F | C | D |
| Apalachee Elementary School | D | C | C | C | C | B |
| Astoria Park Elementary School | B | A | A | A | B | A |
| Augusta Raa Middle School | B | A | A | A | A | A |
| Belle Vue Middle School | | | | C | D | D |
| Bond Elementary School | C | C | B | B | C | D |
| Buck Lake Elementary School | A | A | A | A | A | A |
| C.K. Steele-Leroy Collins Charter M.S. | D | C | C | B | C | C |
| Canopy Oaks Elementary School | A | A | A | A | A | A |
| Chaires Elementary School | A | A | A | A | B | A |
| Deerlake Middle School | A | A | A | A | A | A |
| Desoto Trail Elementary School | A | A | A | A | A | A |
| Elizabeth Cobb Middle School | A | A | A | A | A | A |
| Fairview Middle School | B | B | A | B | B | B |
| Fort Braden Elementary School | C | B | C | B | B | B |
| Frank Hartsfield Elementary School | B | C | C | B | A | B |
| Gilchrist Elementary School | A | A | A | A | A | A |
| Griffin Middle School | C | C | C | C | C | C |
| Hawks Rise Elementary School | A | A | A | A | A | A |
| Imagine School at Evening Rose | C | C | A | F | | |
| J. Michael Conley Elementary School | A | A | B | A | | |
| James Rickards High School | Pending | B | A | D | C | C |
| John G. Riley Elementary School | C | B | C | A | B | C |
| Kate Sullivan Elementary School | A | B | B | B | A | A |
| Killlearn Lakes Elementary School | A | A | A | A | A | A |
| Lawton Chiles High School | Pending | A | A | B | A | B |
| Leon High School | Pending | B | B | C | A | B |
| Lillian Ruediger Elementary School | B | C | C | A | B | A |
| Lincoln High School | Pending | B | A | B | A | A |
| Oak Ridge Elementary School | C | B | C | A | C | C |
| Pineview Elementary School | B | C | A | B | A | C |
| R. Frank Nims Middle School | D | C | F | D | C | F |
| Roberts Elementary School | A | B | A | A | A | A |
| Sabal Palm Elementary School | C | B | B | B | C | B |
| Sail | Pending | A | B | B | A | B |
| Sealey Elementary School | A | B | B | A | A | A |
| Springwood Elementary School | C | B | C | A | C | B |
| Stars Middle School | B | A | C | C | C | |
| Swift Creek Middle School | A | A | A | A | A | A |
| The School of Arts & Sciences | A | A | A | A | A | A |
| Walter T. Moore Jr. Elementary School | A | B | A | A | A | A |
| William J. Montford III Middle School | A | A | A | A | | |
| Woodville Elementary School | B | A | B | B | D | C |

Source: Florida Department of Education, Evaluation and Reporting

4.4 SAT and ACT Results

Students in the Leon County School District continued to score favorably in comparison with Florida and national averages in the SAT and ACT student assessment tests. The Leon County School District has consistently scored the same or higher than the average for districts statewide in total ACT and SAT mean composite scores.

Figure 4-6
SAT Mean Results, Total (2003-04-2011-12)

| | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2011-12 |
|-----------------------------|---------|---------|---------|---------|---------|---------|---------|
| Leon County School District | 1,073 | 1,056 | 1,074 | 1,076 | 1,078 | 1,065 | 1,050 |
| State Of Florida Average | 993 | 993 | 990 | 991 | 991 | 976 | 984 |
| U.S. Average | 1,021 | 1,017 | 1,014 | 1,013 | 1,015 | 1,011 | 1,010 |

Note: This report summarizes results for Leon District's graduating seniors 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 May 2012. The SAT-I assesses critical reading 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, Program Monitoring & Evaluation Services

Figure 4-7
ACT Mean Results, Total (2003-04-2011-12)

| | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2011-12 |
|-----------------------------|---------|---------|---------|---------|---------|---------|---------|
| Leon County School District | 21.1 | 21.0 | 21.0 | 20.6 | 20.1 | 21.1 | 20.9 |
| State Of Florida Average | 20.3 | 19.9 | 19.8 | 19.5 | 19.5 | 19.6 | 19.8 |
| U.S. Average | 21.1 | 21.2 | 21.1 | 21.1 | 21.0 | 21.1 | 21.1 |

Note: This report summarizes results for Leon District's graduating seniors 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, Program Monitoring & Evaluation Services

Section 5

Community and Environment

Topics

| | | |
|-----|--------------------------------------|----|
| 5.1 | History of Tallahassee/Leon County | 34 |
| 5.2 | Tallahassee's History of Annexations | 36 |
| 5.3 | Climate | 37 |
| 5.4 | Public Safety | 38 |
| 5.5 | Local Government | 39 |

Figures

| | | |
|-----|---|----|
| 5-1 | Tallahassee's History of Annexations (1927-2011) | 36 |
| 5-2 | Climactic Data for the Tallahassee Area | 37 |
| 5-3 | Leon County Crime Rates, Rate per 100,000 Residents (2006-2011) | 38 |
| 5-4 | Total Index Crime Rate in Leon County and Florida (2006-2011) | 38 |
| 5-5 | Property Tax Rate (2011) | 39 |

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. Since 1980, the City has witnessed a tremendous increase in annexation activity with 75 additional square miles having been added during this time, swelling the size of Tallahassee to 103.25 square miles as of January 1, 2012. 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 (1927-2011)

| 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 - 1999 | 81.86 | 16.35 | 98.21 |
| 2000 - 2004 | 98.21 | 3.79 | 102.00 |
| 2005 - 2009 | 102.00 | 1.06 | 103.06 |
| 2010 | 103.06 | 0.00 | 103.06 |
| 2011 | 103.06 | 0.19 | 103.25 |

Source: City of Tallahassee, Public Works Department, Engineering

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 6.2 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
Climatic 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 | 10 | 9 | 5.4 |
| February | 67 | 42 | 0 | 7 | 8 | 4.6 |
| March | 74 | 48 | 0 | 2 | 8 | 6.5 |
| April | 80 | 53 | 1 | 3 | 6 | 3.6 |
| May | 87 | 62 | 9 | 0 | 7 | 5.0 |
| June | 91 | 70 | 19 | 0 | 13 | 6.9 |
| July | 92 | 73 | 23 | 0 | 16 | 8.0 |
| August | 92 | 73 | 22 | 0 | 14 | 7.0 |
| September | 89 | 69 | 15 | 0 | 9 | 5.0 |
| October | 81 | 57 | 2 | 0 | 5 | 3.3 |
| November | 73 | 48 | 0 | 3 | 6 | 3.9 |
| December | 66 | 42 | 0 | 9 | 8 | 4.1 |
| Annual | 79.5 | 56.3 | 91 | 34 | 109 | 63.2 |

Source: National Climatic Data Center

5.4 Public Safety

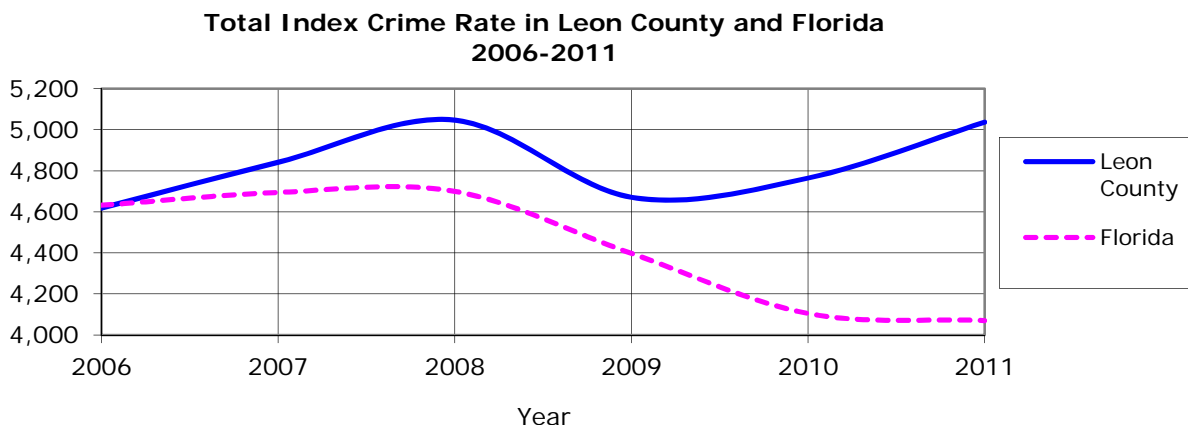
Between 2010 and 2011, Leon County experienced a 5.7% increase in the total crime index rate (rate per 100,000 population) compared to a 0.8% decrease for the State of Florida. The index rate for violent crimes in Leon County decreased 3.6% in 2011 over 2010 levels. Property Crime rates increased 7.5% between 2010 and 2011 with the rate of burglaries up 14.9% during the period and a 4.6% increase in the rate of motor vehicle thefts.

Figure 5-3
Leon County Crime Rates, Rate per 100,000 Residents (2006-2011)

| Type of Crime | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | Avg. Annual Rate Change (2006-2011) |
|--------------------------|---------|---------|---------|---------|---------|---------|-------------------------------------|
| Violent Crimes | 776.5 | 815.7 | 839.6 | 742.0 | 762.6 | 735.1 | -1.1% |
| Murder | 3.7 | 1.8 | 5.1 | 3.6 | 5.5 | 5.1 | 6.4% |
| Forcible Sex Offenses | 101.7 | 102.6 | 81.5 | 52.8 | 86.6 | 77.8 | -5.4% |
| Robbery | 194.1 | 239.7 | 266.3 | 196.9 | 196.1 | 208.1 | 1.4% |
| Aggravated Assault | 477.1 | 471.6 | 486.7 | 488.7 | 474.4 | 444.1 | -1.4% |
| Property Crime | 3,842.2 | 4,026.1 | 4,207.1 | 3,929.0 | 4,002.1 | 4,301.8 | 2.3% |
| Burglary | 1,128.8 | 1,253.6 | 1,341.6 | 1,459.2 | 1,279.6 | 1,470.3 | 5.3% |
| Larceny | 2,427.9 | 2,482.6 | 2,627.6 | 2,310.4 | 2,553.7 | 2,654.9 | 1.8% |
| Motor Vehicle Theft | 285.5 | 289.9 | 237.9 | 159.4 | 168.8 | 176.6 | -9.6% |
| Index Rate (per 100,000) | 4,618.8 | 4,841.8 | 5,046.7 | 4,671.0 | 4,764.7 | 5,037.0 | 1.7% |

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

Figure 5-4
Total Index Crime Rate in Leon County and Florida (2006-2011)



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 (2011)

| Taxing Authority | Millage Rate | Where Tax is Applied |
|---------------------------------|---------------------|-----------------------------|
| Leon County Commission | | |
| General Property Tax | 7.8500 | Anywhere in Leon County |
| County Health MSTU | 0.0000 | Anywhere in Leon County |
| County EMS MSTU | 0.5000 | Anywhere in Leon County |
| Leon County School Board | | |
| State Law | 5.5350 | Anywhere in Leon County |
| Local Board | 2.2480 | Anywhere in Leon County |
| Tallahassee City Commission | 3.7000 | Within City Limits Only |
| NW Florida Water Mgmt. District | 0.0400 | Anywhere in Leon County |
| Downtown Improvement Authority | 1.0000 | In the Downtown Area Only |
| Inside City Limits Total | 19.8730 | |
| Outside City Limits Total | 16.1730 | |
| Downtown Improvement Area | 20.8730 | |

Source: Leon County Property Appraiser

Section 6

Residential and Commercial Development

Topics

| | | |
|-----|--------------------------------------|----|
| 6.1 | Residential Development | 41 |
| 6.2 | Housing Unit Inventory/Vacancy Rates | 42 |
| 6.3 | Commercial Development | 43 |
| 6.4 | Urban Service Area Development | 44 |
| 6.5 | Office Market Summary | 45 |
| 6.6 | Apartment Market Summary | 46 |
| 6.7 | Industrial Market Summary | 47 |
| 6.8 | Median Residential Sale Prices | 48 |
| 6.9 | Mortgage Foreclosure Cases | 49 |

Figures

| | | |
|------|---|----|
| 6-1 | Residential Building Permits Issued (New Constr.) by Type in Leon County(1985-2011) | 41 |
| 6-2 | Housing Unit Inventory (1970-2040) | 42 |
| 6-3 | Residential Vacancy Rates (1970-2010) | 42 |
| 6-4 | Commercial Building Permits Issued (New Construction) in Leon County (2000-2011) | 43 |
| 6-5 | Value of Commercial Building Permits Issued (New Construction, 2000-2011) | 43 |
| 6-6 | Percent of New Development Inside the Urban Service Area | 44 |
| 6-7 | New Development Inside the Urban Service Area (2002-2011) | 44 |
| 6-8 | Office Market Survey (Year-End 2011) | 45 |
| 6-9 | Historical Office Vacancy Rates (2004-2011) | 45 |
| 6-10 | Apartment Market Survey (2004-2011) | 46 |
| 6-11 | Apartment Market Vacancy Rate (2004-2011) | 46 |
| 6-12 | Industrial Market Survey (Mid-Year 2011) | 47 |
| 6-13 | Median Residential Sale Prices in Leon County (2007-2011) | 48 |
| 6-14 | Median Residential Sale Prices in Leon County (2007-2011) | 48 |
| 6-15 | Leon County Mortgage Foreclosure Cases (2002-2011) | 49 |
| 6-16 | Leon County Mortgage Foreclosure Cases (2002-2011) | 49 |

6.1 Residential Development

The overall level of residential building permits for new construction issued in Leon County increased in 2011. The number of new construction permits for detached single-family homes fell 11% in 2011. The calendar year 2011 saw the fewest permits issued for new construction of single-family units (attached and detached) in a calendar year in Leon County since before 1970 (earliest Planning Department records available). Multi-family new construction permits rebounded slightly in 2011 with two larger apartment communities permitted (Campus Circle and Retreat Tallahassee).

Figure 6-1
Residential Building Permits Issued (New Construction) By Type
in Leon County (1985-2011)

| 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 | 239 | 3,191 |
| 2005 | 1,552 | 392 | 1,411 | 3,355 | 152 | 3,507 |
| 2006 | 926 | 354 | 659 | 1,939 | 132 | 2,071 |
| 2007 | 756 | 357 | 1,041 | 2,154 | 175 | 2,329 |
| 2008 | 425 | 124 | 267 | 816 | 113 | 929 |
| 2009 | 326 | 47 | 327 | 700 | 92 | 792 |
| 2010 | 300 | 101 | 27 | 428 | 90 | 518 |
| 2011 | 268 | 80 | 553 | 901 | 70 | 971 |

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

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

6.2 Housing Unit Inventory/Vacancy Rates

There were an estimated 124,136 residential housing units in Leon County as of 2011, approximately 68% located within the Tallahassee City Limits and 32% in unincorporated Leon County.

Figure 6-2
Housing Unit Inventory (1970-2040)

| Year | City of Tallahassee | Unincorporated Leon 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 |
| 2010 | 84,248 | 39,888 | 124,136 |
| 2011(e) | 84,413 | 40,302 | 124,715 |
| 2020(p) | 93,695 | 41,130 | 134,825 |
| 2030(p) | 104,272 | 42,694 | 146,966 |
| 2040(p) | 113,003 | 43,962 | 156,965 |

Sources: U.S. Department of Commerce, Bureau of the Census (1970-2010), Tallahassee-Leon County Planning Department Estimates and Projections (2011-2040)

Figure 6-3
Residential Vacancy Rates (1970-2010)

| Year | City of Tallahassee | Unincorporated Leon 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% |
| 2010 | 11.2% | 9.4% | 10.6% |

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

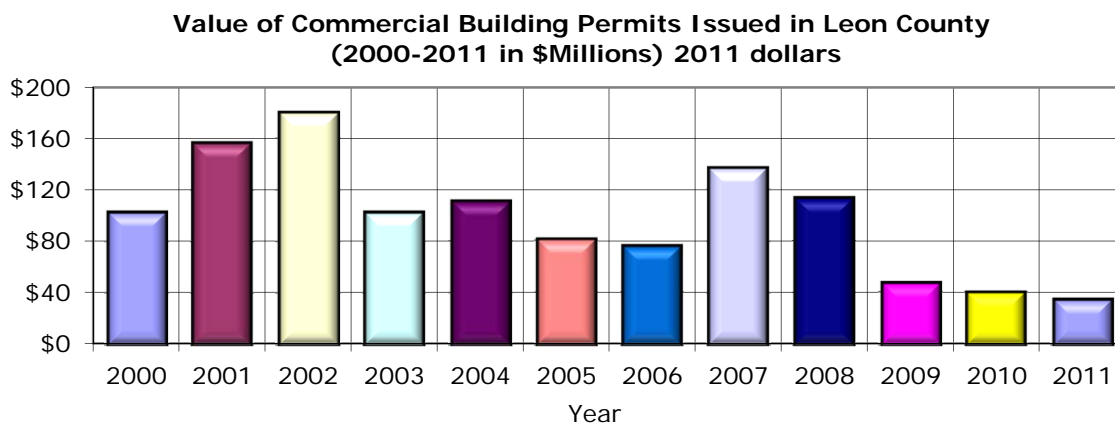
The value of commercial permits issued for new construction in 2011 was down 11% when compared to 2010 levels. Adjusted for inflation, the value of commercial permits issued for new construction in 2011 was the lowest annual value since 1993. Note: For the purposes of this comparison, the valuation of permits to construct new public facilities are not included in these totals. In 2011 the value was \$38.5 million, 2010 (\$11.7 million) and 2009 (\$45.2 million).

Figure 6-4
Commercial Building Permits Issued (New Construction) in Leon County (2000-2011)

| Year | Number of Permits | Value of Permits (\$Millions) | Permit Value in 2011 Dollars (\$Millions) |
|------|-------------------|-------------------------------|---|
| 2000 | 119 | \$78.7 | \$102.8 |
| 2001 | 140 | \$123.5 | \$156.8 |
| 2002 | 129 | \$144.3 | \$180.4 |
| 2003 | 104 | \$84.1 | \$102.8 |
| 2004 | 106 | \$93.4 | \$111.2 |
| 2005 | 98 | \$70.5 | \$81.2 |
| 2006 | 109 | \$68.0 | \$75.9 |
| 2007 | 83 | \$126.4 | \$137.1 |
| 2008 | 88 | \$108.5 | \$113.3 |
| 2009 | 48 | \$45.2 | \$47.4 |
| 2010 | 30 | \$39.0 | \$40.2 |
| 2011 | 26 | \$34.7 | \$34.7 |

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

Figure 6-5
Value of Commercial Building Permits Issued (2000-2011)



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

6.4 Urban Service Area Development

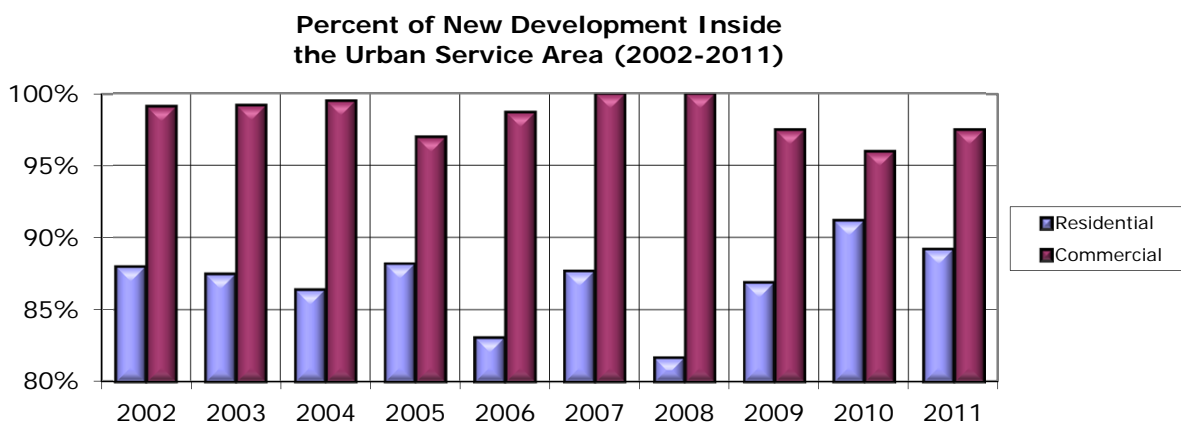
The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA). The location and size of the USA is based upon the area necessary to accommodate 90% of new residential dwelling units within the County by the Plan Horizon. The percentage of new residential development constructed within the approximate 161 square mile USA in 2011 was 89.2%.

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

| Year | Residential | Commercial |
|------|-------------|------------|
| 2002 | 88.0% | 99.1% |
| 2003 | 87.5% | 99.2% |
| 2004 | 86.4% | 99.5% |
| 2005 | 88.2% | 97.0% |
| 2006 | 83.1% | 98.7% |
| 2007 | 87.7% | 100.0% |
| 2008 | 81.7% | 100.0% |
| 2009 | 86.9% | 97.5% |
| 2010 | 91.2% | 96.0% |
| 2011 | 89.2% | 97.5% |

*Note: Residential Development measured in units constructed, commercial development, sq. ft. constructed
Mobile home units permitted within mobile home parks are not included in residential unit totals
Sources: Permit Enforcement Tracking System, Leon County Department of Development Support & Environmental Management, City of Tallahassee Growth Management Department*

Figure 6-7
New Development Inside the Urban Service Area (2002-2011)



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

6.5 Office Market Summary

The total Tallahassee/Leon County office market consists of approximately seven million square feet of privately owned office space. In addition, the State of Florida owns and occupies approximately 4.5 million square feet. The overall office vacancy rate in Leon County increased as of year-end 2011 to 20.9% (from 14.9% for year-end 2010). The major factor in this jump in office vacancy was the relocation of the Department of Corrections and the Department of Revenue into State-owned facilities. These agencies vacated 450,000 SF of privately owned office space in the market.

Figure 6-8
Office Market Survey (Year-End 2011)

| Market | Number of Properties | Square Feet Surveyed | Square Feet Vacant | Percent Vacant | Asking Rents* |
|----------------|----------------------|----------------------|--------------------|----------------|-------------------|
| Downtown | 17 | 956,506 | 173,016 | 18.1% | \$18.00-\$26.00** |
| Northeast | 64 | 1,794,253 | 241,584 | 13.5% | \$14.00-\$25.00 |
| Northwest/West | 18 | 1,423,680 | 346,119 | 24.3% | \$12.00-\$18.00 |
| Southeast | 31 | 2,746,309 | 683,497 | 24.9% | \$12.00-\$18.50 |
| Total | 130 | 6,920,748 | 1,444,216 | 20.9% | \$12.00-\$26.00 |

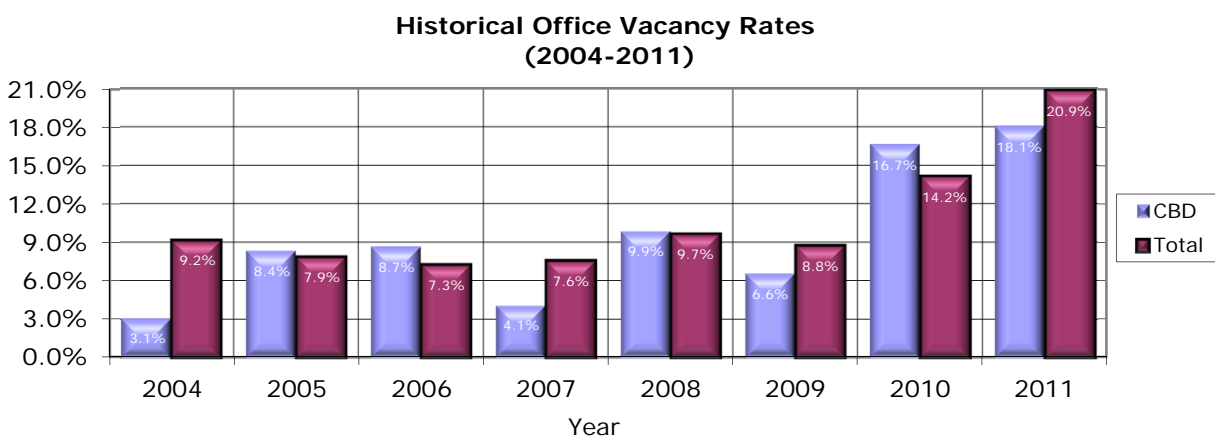
*All rents adjusted to full service (operating expenses include utilities and janitorial)

**Downtown CBD (Central Business District)

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

Source: Chip Hartung, Coldwell Banker Hartung and Noblin, Inc.

Figure 6-9
Historical Office Vacancy Rates (2004-2011)



Source: Chip Hartung, Coldwell Banker Hartung and Noblin, Inc.

Note: Data for years 2004-2009 represent first quarter data, 2010-2011 represent end-of-year data.

6.6 Apartment Market Summary

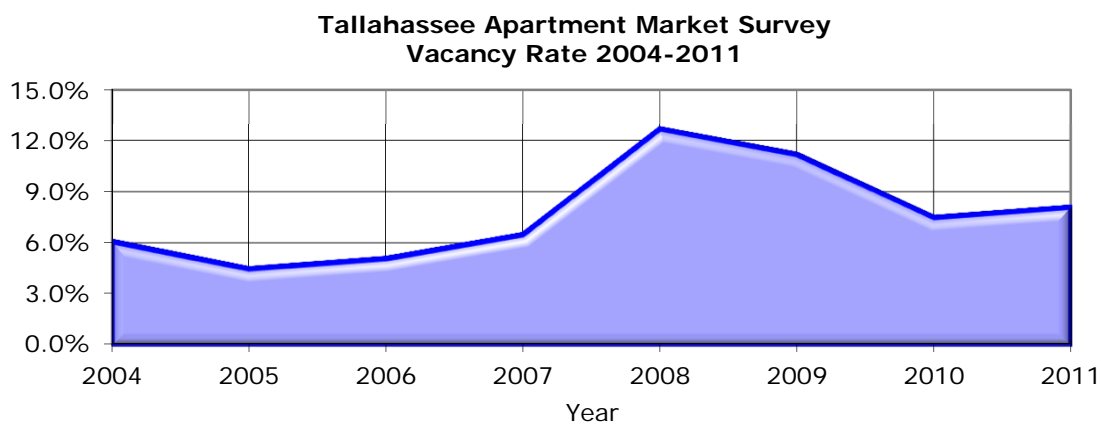
The apartment vacancy rate in Tallahassee increased from 7.5% in September 2010 to 8.1% in September 2011. The average monthly rent is now over \$950 with the average one bedroom renting for just over \$650 per month and the average four bedroom renting for just under \$1,900 per month.

Figure 6-10
Apartment Market Survey (2004-2011)

| | Sept. 2004 | Sept. 2005 | Sept. 2006 | Sept. 2007 | Sept. 2008 | Sept. 2009 | Sept. 2010 | Sept. 2011 |
|---------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-------------------|
| Total Units Surveyed | 18,206 | 18,000 | 18,560 | 17,722 | 18,348 | 19,307 | 18,829 | 19,419 |
| Vacant Units | 1,102 | 817 | 943 | 1,149 | 2,328 | 2,163 | 1,407 | 1,573 |
| Vacancy Rate | 6.1% | 4.5% | 5.1% | 6.5% | 12.7% | 11.2% | 7.5% | 8.1% |
| Average Sq. Ft. Range | 950- 1,000 | 1,000- 1,050 | 950- 1,000 | 950- 1,000 | 1,000- 1,050 | 1,000- 1,050 | 1,000- 1,050 | 1,000- 1,050 |
| Average Rent per Month Range | \$750- \$800 | \$800- \$850 | \$850- \$900 | \$850- \$900 | \$900- \$950 | \$900- \$950 | \$900- \$950 | \$950- \$1,000 |

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, 2011 Tallahassee Apartment Index, www.apindex.com, October 2011

Figure 6-11
Apartment Market Vacancy Rate (2004-2011)



Source: Real Data, 2011 Tallahassee Apartment Index, www.apindex.com, October 2011

6.7 Industrial Market Summary

The total industrial inventory in the Tallahassee market area was 16,287,857 square feet in 1,080 buildings as of the end of the 2nd quarter 2011. Two-thirds of the industrial space in the Tallahassee market is located within Tallahassee/Leon County. The industrial vacancy rate in the Tallahassee market was 9.6% at the end of the second quarter 2011, down from 10.0% at the end of the first quarter 2011 and lower than the fourth quarter 2010 (10.3%).

Figure 6-12
Industrial Market Survey (Mid-Year 2011)

| Market | Number of Buildings | Total Square Feet | Total Square Feet Available | Vacancy Rate | Quoted Rates |
|--------------------------------|---------------------|-------------------|-----------------------------|--------------|---------------|
| Downtown Tallahassee | 116 | 1,139,742 | 95,567 | 8.4% | \$4.39 |
| East Tallahassee | 53 | 557,064 | 44,700 | 8.0% | \$5.94 |
| Northeast Tallahassee | 5 | 64,660 | 0 | 0.0% | \$0.00 |
| Northeast Leon County | 14 | 158,599 | 10,000 | 6.3% | \$8.46 |
| Northwest Tallahassee | 98 | 1,955,627 | 127,408 | 6.5% | \$5.70 |
| Northwest Leon County | 117 | 1,247,216 | 259,435 | 20.8% | \$5.75 |
| Southeast Tallahassee | 7 | 22,716 | 0 | 0.0% | \$0.00 |
| Southeast Leon County | 33 | 330,201 | 13,000 | 3.9% | \$5.27 |
| Southwest Tallahassee | 68 | 2,045,876 | 106,940 | 5.2% | \$5.90 |
| Southwest Leon County | 176 | 1,740,420 | 165,726 | 9.5% | \$4.20 |
| West Tallahassee | 117 | 1,526,248 | 80,100 | 5.2% | \$4.81 |
| Leon County Total | 804 | 10,788,369 | 902,876 | 8.4% | n/a |
| Gadsden County | 171 | 4,646,228 | 586,550 | 12.6% | \$2.31 |
| Wakulla County | 54 | 413,382 | 24,189 | 5.9% | \$4.22 |
| Jefferson County | 51 | 439,878 | 53,800 | 12.2% | \$2.50 |
| Tallahassee Market Area | 1,080 | 16,287,857 | 1,567,415 | 9.6% | \$4.17 |

Source: CoStar Property

6.8 Median Residential Sale Prices

The median sales price of a detached single-family home in Leon County decreased 1.4% per quarter on average between first quarter 2007 and fourth quarter 2011. Over the past ten years, (first quarter 2001 to first quarter 2011) the median sales price increased on average 0.5% per quarter.

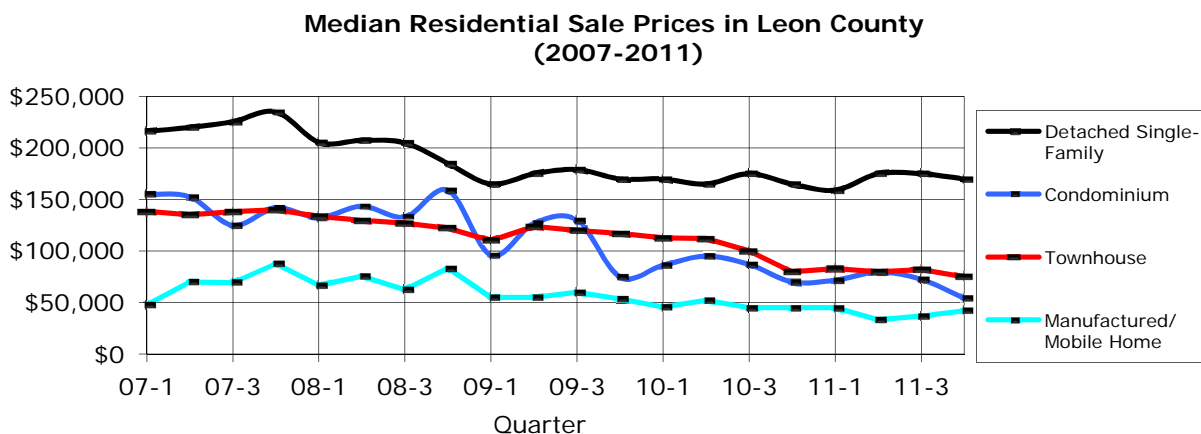
Figure 6-13
Median Residential Sale Prices in Leon County (2007-2011)

| Quarter | Detached Single-Family | Condominium | Townhouse | Manufactured/ Mobile Home |
|---------|------------------------|-------------|-----------|---------------------------|
| 2007-1 | \$216,000 | \$155,000 | \$138,500 | \$47,800 |
| 2007-2 | \$219,900 | \$152,500 | \$135,000 | \$69,900 |
| 2007-3 | \$225,450 | \$124,900 | \$138,250 | \$69,450 |
| 2007-4 | \$235,000 | \$141,750 | \$140,000 | \$87,750 |
| 2008-1 | \$205,500 | \$132,500 | \$133,650 | \$66,700 |
| 2008-2 | \$207,250 | \$143,500 | \$130,000 | \$75,500 |
| 2008-3 | \$205,000 | \$133,000 | \$127,000 | \$62,400 |
| 2008-4 | \$185,000 | \$158,900 | \$122,200 | \$83,500 |
| 2009-1 | \$165,000 | \$95,950 | \$110,000 | \$54,900 |
| 2009-2 | \$175,000 | \$126,750 | \$124,000 | \$55,000 |
| 2009-3 | \$179,000 | \$130,000 | \$120,000 | \$60,000 |
| 2009-4 | \$170,000 | \$74,900 | \$117,250 | \$53,500 |
| 2010-1 | \$169,900 | \$86,112 | \$112,750 | \$45,750 |
| 2010-2 | \$165,000 | \$95,000 | \$112,000 | \$52,250 |
| 2010-3 | \$175,000 | \$87,000 | \$100,000 | \$45,000 |
| 2010-4 | \$165,000 | \$70,000 | \$80,000 | \$45,000 |
| 2011-1 | \$159,000 | \$71,750 | \$83,000 | \$45,000 |
| 2011-2 | \$175,000 | \$79,500 | \$80,000 | \$33,450 |
| 2011-3 | \$175,000 | \$72,500 | \$82,000 | \$37,100 |
| 2011-4 | \$170,000 | \$54,250 | \$75,000 | \$42,075 |

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

Source: Tallahassee Real Estate N Data Services (TRENDS)

Figure 6-14
Median Residential Sale Prices in Leon County (2007-2011)



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

Source: Tallahassee Real Estate N Data Services (TRENDS)

6.9 Mortgage Foreclosure Cases

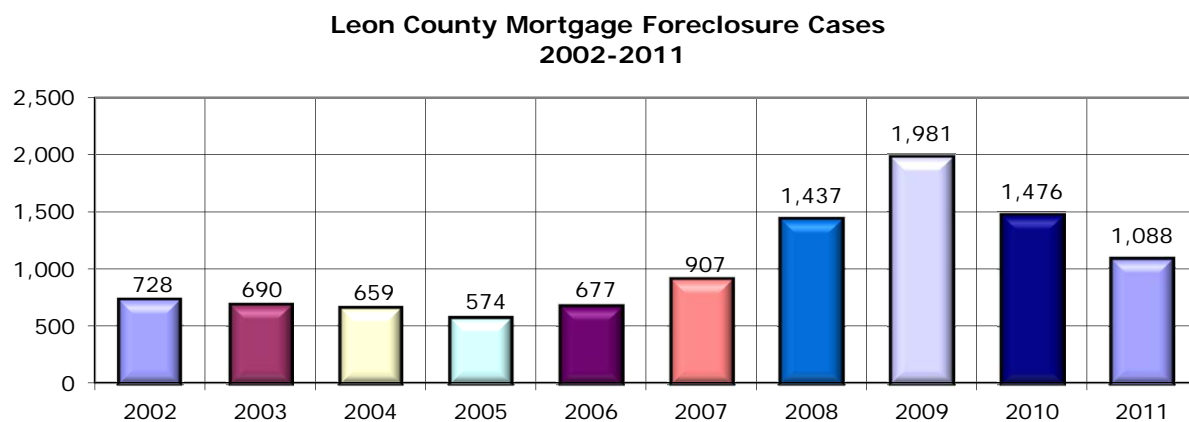
There were 1,088 mortgage foreclosure cases in Leon County in 2011 according to the Leon County Clerk of Courts (down 26.3% from 2010). Mortgage foreclosures have consistently fallen over the most recent two calendar years.

Figure 6-14
Leon County Mortgage Foreclosure Cases (2002-2011)

| Year | Foreclosure Cases | Change Over Previous Year |
|------|-------------------|---------------------------|
| 2002 | 728 | - |
| 2003 | 690 | -5.2% |
| 2004 | 659 | -4.5% |
| 2005 | 574 | -12.9% |
| 2006 | 677 | 17.9% |
| 2007 | 907 | 34.0% |
| 2008 | 1,437 | 58.4% |
| 2009 | 1,981 | 37.9% |
| 2010 | 1,476 | -25.5% |
| 2011 | 1,088 | -26.3% |

Source: Leon County Clerk of Courts

Figure 6-15
Leon County Mortgage Foreclosure Cases (2002-2011)



Source: Leon County Clerk of Courts