

TALLAHASSEE-LEON COUNTY PLANNING DEPARTMENT
2013 Statistical Digest
September 2013

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Section 1

Demographics

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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 (1930-2013)

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
2013	183,727	94,650	278,377

Sources: U.S. Department of Commerce, Bureau of the Census (1930-2010), University of Florida, Bureau of Economic and Business Research (2013 estimate)

Figure 1-2
Population Projections (2015-2040)

Year	City of	Unincorporated	
	Tallahassee	Leon County	Leon County
2015	188,000	95,200	284,800
2020	199,100	97,100	298,400
2025	209,700	99,000	311,100
2030	219,600	100,700	322,900
2035	228,800	102,300	332,700
2040	237,500	103,700	341,500

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

By estimated population change by census tract since Census 2010, CT 21.04 (multi-family units), CT 24.17 (inclusive of Bull Run) and CT 26.05 (inclusive of Southwood) are estimated to have added the most residents since Census 2010.

Figure 1-3
Population Growth by Census Tract, (2010-2013)

Census Tract	Total Population 2010 Census	Total Population 2013 Estimate	Estimated Total Population Change, 2010-2013	Census Tract	Total Population 2010 Census	Total Population 2013 Estimate	Estimated Total Population Change, 2010-2013
2	3,737	3,748	11	21.03	3,418	3,418	0
3.01	1,546	1,544	-2	21.04	7,310	7,660	350
3.02	2,334	2,342	8	22.01	5,016	5,193	177
3.03	3,628	3,647	19	22.05	5,642	5,733	91
4	2,393	2,384	-9	22.06	3,168	3,168	0
5	2,433	2,572	139	22.07	2,242	2,244	2
6	3,858	3,851	-7	22.08	4,771	4,776	5
7	2,004	2,007	3	23.02	3,342	3,361	19
8	2,973	2,980	7	23.03	3,930	3,985	55
9.01	7,989	8,008	19	23.04	2,898	2,914	16
9.03	2,144	2,142	-2	24.03	2,676	2,691	15
9.04	3,313	3,313	0	24.08	7,745	7,790	45
9.05	2,593	2,593	0	24.10	6,018	6,029	11
10.01	2,692	2,680	-12	24.11	1,609	1,640	31
10.02	2,188	2,188	0	24.12	9,050	9,108	58
11.01	2,896	2,892	-4	24.13	2,464	2,525	61
11.02	2,503	2,544	41	24.14	4,273	4,275	2
12	1,314	1,343	29	24.15	4,323	4,333	10
13	6,552	6,552	0	24.16	2,774	2,823	49
14.01	2,932	2,950	18	24.17	7,207	7,548	341
14.02	4,791	4,770	-21	25.05	5,641	5,727	86
15	4,475	4,475	0	25.07	2,538	2,574	36
16.01	4,577	4,605	28	25.08	9,064	9,194	130
16.02	3,091	3,098	7	25.09	3,653	3,655	2
17	7,270	7,308	38	25.10	7,397	7,458	61
18.01	3,966	4,028	62	25.11	1,292	1,301	9
18.02	5,207	5,260	53	25.12	3,346	3,522	176
19.01	3,035	3,038	3	25.13	3,598	3,652	54
19.02	4,062	4,094	32	26.03	4,991	5,024	33
20.03	2,298	2,298	0	26.04	3,108	3,156	48
20.04	7,383	7,383	0	26.05	4,218	4,540	322
20.05	3,326	3,322	-4	26.06	3,232	3,253	21
20.06	3,472	3,529	57	27.01	4,978	5,006	28
21.01	4,675	4,679	4	27.02	4,905	4,940	35

Sources: U.S. Department of Commerce, Bureau of the Census, Census 2010; University of Florida, Bureau of Economic and Business Research, 2013 Leon County Estimates; Tallahassee-Leon County Planning Department, Census Tract Estimates

1.3 Age and Gender

Leon County has the highest percentage of population between the ages of 18 and 24 in the state at 22.3% (tied with Alachua County) and the smallest percentage aged 65 and older at 10.3% in the State of Florida.

Figure 1-4
Leon County Population by Age and Gender (2012 Estimate)

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	15,205	5.5%	7,438	2.7%	7,767	2.8%
5 to 17	39,059	14.1%	19,332	7.0%	19,727	7.1%
18 to 24	61,832	22.3%	32,963	11.9%	28,869	10.4%
25 to 54	102,850	37.0%	53,248	19.2%	49,602	17.9%
55 to 64	30,202	10.9%	16,062	5.8%	14,140	5.1%
65 to 79	21,274	7.7%	11,551	4.2%	9,723	3.5%
80+	7,248	2.6%	4,706	1.7%	2,542	0.9%
Total	277,670	100.0%	145,300	52.3%	132,370	47.7%

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 166", June 2013

Figure 1-5
Leon County Population Growth by Age Group (2010-2012)

Age Group	2010 Population	2012 Population Estimate	Growth in Population 2010-2012	Percent Growth 2010-2012	Avg. Ann. Growth 2010-2012
0 to 4	15,350	15,205	-145	-0.9%	-0.5%
5 to 17	38,623	39,059	436	1.1%	0.6%
18 to 24	61,897	61,832	-65	-0.1%	-0.1%
25 to 54	103,907	102,850	-1,057	-1.0%	-0.5%
55 to 64	29,730	30,202	472	1.6%	0.8%
65 to 79	18,962	21,274	2,312	11.5%	5.8%
80+	7,018	7,248	230	3.2%	1.6%
Total	275,487	277,670	2,183	0.8%	0.4%

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 166", June 2013; 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 60.1% non-Hispanic white, 30.8% non-Hispanic black, 5.6% of Hispanic origin and 3.5% of "other" races and ethnicities.

Figure 1-6
Leon County Population by Age, Race and Ethnicity (2012 Estimate)

Age Group	All Races	Non-Hispanic	Non-Hispanic	Other	Hispanic
		White	Black		Origin
0 to 4	15,205	7,069	6,421	673	1,042
5 to 17	39,059	20,136	15,063	1,459	2,401
18 to 24	61,832	34,580	20,248	1,759	5,245
25 to 54	102,850	61,090	31,707	4,506	5,547
55 to 64	30,202	22,018	6,664	723	797
65 to 79	21,274	16,268	4,087	424	495
80+	7,248	5,747	1,293	68	140
Total	277,670	166,908	85,483	9,612	15,667

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 166", June 2013

Figure 1-7
Leon County Pop. by Percentage, Race & Ethnicity (2012 Estimate)

Age Group	Non-Hispanic	Non-Hispanic	Other	Hispanic
	White	Black		Origin
0 to 4	46.5%	42.2%	4.4%	6.9%
5 to 17	51.6%	38.6%	3.7%	6.1%
18 to 24	55.9%	32.7%	2.8%	8.5%
25 to 54	59.4%	30.8%	4.4%	5.4%
55 to 64	72.9%	22.1%	2.4%	2.6%
65 to 79	76.5%	19.2%	2.0%	2.3%
80+	79.3%	17.8%	0.9%	1.9%
Total	60.1%	30.8%	3.5%	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 2013

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. It is estimated that since the 2010 Census, all of Leon County's population growth is attributable to net natural increase (total births less total deaths). Net migration is estimated to have been negative during the period indicating more people moved out of Leon County than moved into Leon County.

Figure 1-8
Components of Population Change (2010-2012)

	Leon County	State of Florida
Total Population Change (2010-2012)	2,183	273,102
Net Natural Increase	2,870	82,840
Births	6,140	427,738
Deaths	3,270	344,898
Net Migration	-687	190,262
Percent due to Natural Increase	100.0%	30.3%
Percent due to Net Migration	0.0%	69.7%

Source: University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2012

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 370,425 in 2012, up 0.8% from 2010.

Figure 1-10
Population Growth in Florida Metropolitan Areas (2000-2012)

Metropolitan Area/County(ies)	2012 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2000-2010
All Metropolitan Areas	17,956,837	17,689,986	15,023,351	17.7%
Miami-Fort Lauderdale-Pompano Beach (<i>Broward, Miami-Dade, Palm Beach</i>)	5,657,804	5,564,657	5,007,988	11.1%
Tampa-St. Petersburg-Clearwater (<i>Hernando, Hillsborough, Pasco, Pinellas</i>)	2,818,165	2,783,243	2,396,013	16.2%
Orlando-Kissimmee-Sanford (<i>Lake, Orange, Osceola, Seminole</i>)	2,184,588	2,134,411	1,644,563	29.8%
Jacksonville (<i>Baker, Clay, Duval, Nassau, St. Johns</i>)	1,358,554	1,345,596	1,122,750	19.8%
North Port-Bradenton-Sarasota (<i>Manatee, Sarasota</i>)	713,966	702,281	589,963	19.0%
Cape Coral-Fort Myers (<i>Lee</i>)	638,029	618,754	440,888	40.3%
Lakeland (<i>Polk</i>)	606,888	602,095	483,924	24.4%
Palm Bay-Melbourne-Titusville (<i>Brevard</i>)	545,625	543,376	476,230	14.1%
Deltona-Daytona Beach-Ormond Beach (<i>Volusia</i>)	497,145	494,593	443,343	11.6%
Pensacola-Ferry Pass-Brent (<i>Escambia, Santa Rosa</i>)	454,901	448,991	412,153	8.9%
Port St. Lucie (<i>Martin, St. Lucie</i>)	427,558	424,107	319,426	32.8%
Tallahassee (<i>Gadsden, Jefferson, Leon, Wakulla</i>)	370,425	367,413	320,304	14.7%
Ocala (<i>Marion</i>)	332,989	331,298	258,916	28.0%
Naples-Marco Island (<i>Collier</i>)	329,849	321,520	251,377	27.9%
Gainesville (<i>Alachua, Gilchrist</i>)	263,716	264,275	232,392	13.7%
Crestview-Fort Walton Beach-Destin (<i>Okaloosa</i>)	187,280	180,822	170,498	6.1%
Panama City-Lynn Haven-Panama City Beach (<i>Bay</i>)	169,392	168,852	148,217	13.9%
Punta Gorda (<i>Charlotte</i>)	163,357	159,978	141,627	13.0%
Sebastian-Vero Beach (<i>Indian River</i>)	139,446	138,028	112,947	22.2%
Palm Coast (<i>Flagler</i>)	97,160	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, 2012

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 2012)

	Estimate April 1, 2012		Census April 1, 2010		Census April 1, 2000	
	Households	Average Household Size	Households	Average Household Size	Households	Average Household Size
Leon County	111,870	2.35	110,945	2.35	96,521	2.34
Florida	7,537,442	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 164", January 2013

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 (2011)

	Leon County		State of Florida		United States	
	Number	Percent	Number	Percent	Number	Percent
Less than 9th grade	3,527	2.3%	734,857	5.7%	12,397,019	6.1%
9th to 12th grade, no diploma	10,119	6.5%	1,136,780	8.8%	17,121,916	8.5%
H.S. graduate (inc. equivalency)	32,472	20.8%	3,897,573	30.1%	57,861,283	28.6%
Some college, no degree	29,973	19.2%	2,701,585	20.9%	42,350,233	21.0%
Associate degree	12,583	8.1%	1,112,053	8.6%	15,344,048	7.6%
Bachelor's degree	38,935	25.0%	2,170,821	16.8%	35,852,277	17.7%
Graduate or professional degree	28,142	18.1%	1,195,547	9.2%	21,121,347	10.5%
Total	155,751		12,949,216		202,048,123	

Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2007-2011

Section 2

Labor Force and Income

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2.1 Labor Force and Employment

Leon County's labor force and number of employed residents has declined slightly over the past two years (2010-2012). Overall, the labor force in Leon increased by more than 8,000 between 2006 and 2012.

**Figure 2-1
Labor Force (2006-2012)**

	2006	2007	2008	2009	2010	2011	2012
Leon County	138,957	145,503	147,166	147,541	150,041	148,725	146,998
% Change From Previous	1.7%	4.7%	1.1%	0.3%	1.7%	-0.9%	-1.2%
City of Tallahassee	88,188	92,405	93,958	93,937	96,861	96,058	95,023
% Change From Previous	2.1%	4.8%	1.7%	0.0%	3.1%	-0.8%	-1.1%
Unincorporated Leon County	50,769	53,098	53,208	53,604	53,180	52,667	51,975
% Change From Previous	1.1%	4.6%	0.2%	0.7%	-0.8%	-1.0%	-1.3%

Source: Florida Dept. of Economic Opportunity, Labor Market Information, 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 (2006-2012)**

	2006	2007	2008	2009	2010	2011	2012
Leon County	135,235	141,132	140,547	137,287	138,119	136,808	136,378
% Change From Previous	2.2%	4.4%	-0.4%	-2.3%	0.6%	-0.9%	-0.3%
City of Tallahassee	85,761	89,528	89,657	87,354	89,135	88,266	87,989
% Change From Previous	2.6%	4.4%	0.1%	-2.6%	2.0%	-1.0%	-0.3%
Unincorporated Leon County	49,474	51,604	50,890	49,933	48,984	48,542	48,389
% Change From Previous	1.5%	4.3%	-1.4%	-1.9%	-1.9%	-0.9%	-0.3%

Source: Florida Dept. of Economic Opportunity, Labor Market Information, 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

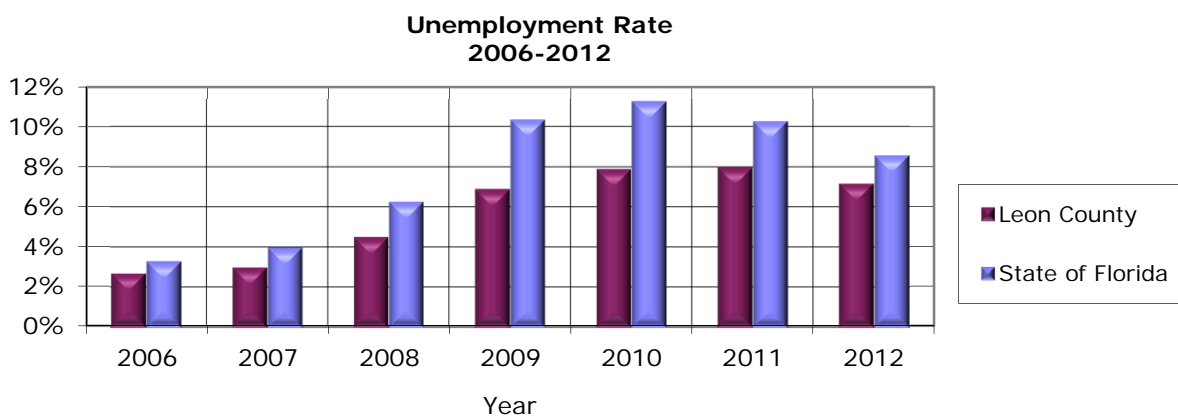
The unemployment rate in Leon County decreased to 7.2% in 2012, still considerably lower than the state average of 8.6%. Initial claims for unemployment compensation decreased 15.7% in 2012 in Leon County and 15.3% for the State.

**Figure 2-3
Unemployment Rate (2006-2012)**

	2006	2007	2008	2009	2010	2011	2012
Leon County	2.7%	3.0%	4.5%	6.9%	7.9%	8.0%	7.2%
City of Tallahassee	2.8%	3.1%	4.6%	7.0%	8.0%	8.1%	7.4%
Unincorporated Leon County	2.6%	2.8%	4.4%	6.8%	7.9%	7.8%	6.9%
State of Florida	3.3%	4.0%	6.3%	10.4%	11.3%	10.3%	8.6%

Source: Florida Dept. of Economic Opportunity, Labor Market Information, 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 Dept. of Economic Opportunity Labor Market Information, Local Area Unemployment Statistics

**Figure 2-4
Initial Claims for Unemployment Compensation (2006-2012)**

	2006	2007	2008	2009	2010	2011	2012
Leon County	5,622	5,922	9,168	12,313	11,874	10,570	8,908
% Change from Previous	-5.2%	5.3%	54.8%	34.3%	-3.6%	-11.0%	-15.7%
Florida	493,164	638,291	1,022,216	1,397,484	1,236,598	983,692	833,017
% Change from Previous	-9.2%	29.4%	60.1%	36.7%	-11.5%	-20.5%	-15.3%

Source: Florida Dept. of Economic Opportunity, Labor Market Information, Unemployment Compensation Files

2.3 Employment by Industry

Between 2007 and 2012, non-agricultural employment in Leon County decreased on average 1.3% per year. Education & Health Services exhibited the strongest growth (up 2.2% per year). Leisure & Hospitality and Federal Government exhibited small annual average gains while all other industries experienced declining average annual employment during the period.

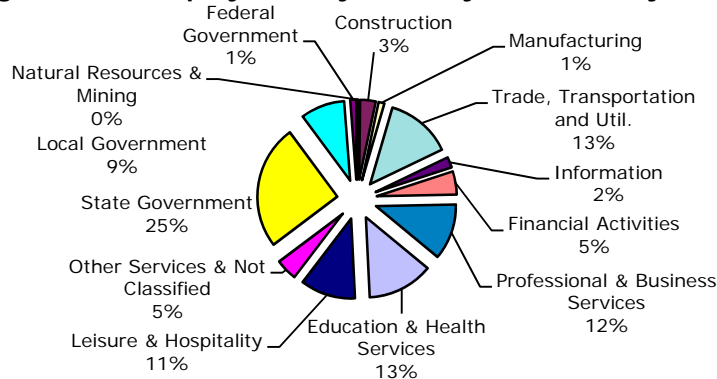
**Figure 2-5
Non-Agricultural Employment by Industry, Leon County (2007-2012)**

	2007	2008	2009	2010	2011	2012	Avg. Annual Change
Natural Resources & Mining	224	198	151	174	153	221	-0.1%
Construction	7,258	6,489	5,339	4,794	4,541	4,344	-14.2%
Manufacturing	2,319	2,146	1,964	1,934	1,695	1,660	-8.1%
Trade, Transportation and Util.	20,741	19,848	18,506	18,271	18,388	18,275	-2.7%
Information	3,686	3,726	3,098	2,793	2,863	2,929	-5.2%
Financial Activities	7,323	7,103	6,639	6,393	6,486	6,418	-2.8%
Professional & Business Services	16,986	16,778	16,085	15,822	15,950	15,542	-1.9%
Education & Health Services	16,210	16,920	17,569	17,857	18,236	18,215	2.2%
Leisure & Hospitality	15,073	14,757	14,622	14,468	14,756	15,259	0.2%
Other Services & Not Classified	6,249	6,194	5,807	5,770	5,657	5,974	-0.9%
State Government	35,983	35,213	35,148	35,772	35,075	34,523	-0.8%
Local Government	12,309	12,173	12,124	11,997	12,212	12,203	-0.2%
Federal Government	1,656	1,717	1,732	1,823	1,692	1,679	0.3%
Total	146,017	143,262	138,784	137,868	137,713	137,250	-1.3%

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

**Figure 2-6
Non-Agricultural Employment by Industry, Leon County (2012)**

Non-Agricultural Employment by Industry, Leon County, 2012



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 2012 and 2020.

Figure 2-7
Projected Employment by Industry, Leon County (2012-2020)

Industry	2012 Employment	2020 Employment	Total Employment Annual Change	Annual Percentage Change
Total All Industries	161,030	175,521	1,811	1.1%
Construction	4,567	6,188	203	4.4%
Other Services (Except Government)	7,881	9,309	178	2.3%
Professional and Business Services	17,574	20,462	361	2.1%
Transportation and Warehousing	1,025	1,181	20	1.9%
Education and Health Services	18,809	21,385	322	1.7%
Financial Activities	7,235	8,080	106	1.5%
Leisure and Hospitality	15,049	16,712	208	1.4%
Retail Trade	15,113	16,269	144	1.0%
Manufacturing	1,598	1,711	14	0.9%
Self-Employed & Unpaid Family Workers	13,295	14,095	100	0.8%
Local Government	12,372	13,069	87	0.7%
Wholesale Trade	2,483	2,569	11	0.4%
State Government	39,136	40,287	144	0.4%
Agriculture, Forestry, Fishing and Hunting	146	142	0	-0.3%
Federal Government	1,614	1,462	-19	-1.2%
Information	3,037	2,504	-67	-2.2%

Source: Florida Department of Economic Opportunity, Labor Market Information, Florida Employment Projections

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.

2.5 Projected Employment by Occupation

The top occupation by projected annual percentage growth in Leon County is Heating A/C, Refrigeration Mechanics & Installers. By total employment change, service occupations (Retail Salespersons and Food Prep. and Serving Workers) account for the top two occupations projected to add the most jobs by 2020.

Figure 2-8
Fastest Growing Occupations, Leon County (2012-2020)

Industry	2012 Emp.	2020 Emp.	Total Emp. Change	Annual Percentage Change
Heating A/C, Refrigeration Mechanics & Installers	475	666	191	5.0%
Cost Estimators	163	221	58	4.5%
Clergy	209	278	69	4.2%
Brickmasons and Blockmasons	131	171	40	3.9%
Home Health Aides	439	564	125	3.6%
Pest Control Workers	119	151	32	3.4%
Market Research Analysts and Marketing Specialists	206	261	55	3.3%
Plumbers, Pipefitters, and Steamfitters	245	310	65	3.3%
Carpenters	432	545	113	3.3%
Meeting and Convention Planners	171	214	43	3.1%
First-Line Superv. of Constr. and Extraction Workers	546	682	136	3.1%
Operating Engineers/Construction Equip. Operators	186	232	46	3.1%
Painters, Construction and Maintenance	374	466	92	3.1%

Source: Florida Department of Economic Opportunity, Labor Market Information, Florida Employment Projections

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 (2012-2020)

Industry	2012 Emp.	2020 Emp.	Total Emp. Change	Annual Percentage Change
Retail Salespersons	4,901	5,405	504	1.3%
Food Prep. & Serving Workers, Inc. Fast Food	4,033	4,532	499	1.6%
Management Analysts	5,830	6,273	443	1.0%
Waiters and Waitresses	2,844	3,207	363	1.6%
Office Clerks, General	3,871	4,221	350	1.1%
Maintenance and Repair Workers, General	1,509	1,781	272	2.3%
Receptionists and Information Clerks	1,659	1,918	259	2.0%
Lawyers	2,589	2,820	231	1.1%
Bookkeeping, Accounting and Auditing Clerks	2,128	2,356	228	1.3%
Heating, A.C., and Refrig. Mechanics and Installers	475	666	191	5.0%

Source: Florida Department of Economic Opportunity, Labor Market Information, Florida Employment Projections

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 2011 in Leon County was \$67,472 according to the Census Bureau's 2007-2011 American Community Survey.

Figure 2-10
Median Family Income 2011

	2011
Leon County	\$67,472
Tallahassee MSA*	\$62,083
City of Tallahassee	\$59,525
Florida	\$57,592

Source: U.S. Census Bureau, 2007-2011 American Community Survey

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

Figure 2-11
Median Family Income Estimates by Fiscal Year (2009-2013)

	2009	2010	2011	2012	2013
Tallahassee*	\$63,600	\$63,700	\$63,400	\$64,300	\$60,000
Florida	\$58,800	\$59,400	\$56,200	\$57,000	\$56,400

**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 2012 was \$40,087, 7.2% below the state average wage of \$43,210. The annual average state government wage was 4.5% higher in Leon County compared to the state average while the local government wage in Leon County was 13.0% lower than the state average.

Figure 2-12
Average Annual Employment and Wages by Ownership (2012)

	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
All Ownerships	8,250	137,250	\$40,087
Private Ownerships	7,979	88,845	\$37,553
Federal Government	48	1,679	\$69,144
State Government	199	34,523	\$45,535
Local Government	24	12,203	\$39,128
Florida			
All Ownerships	615,138	7,340,862	\$43,210
Private Ownerships	608,415	6,311,990	\$42,446
Federal Government	2,077	132,772	\$69,561
State Government	3,042	178,482	\$43,587
Local Government	1,604	717,618	\$44,959

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

Figure 2-13
Average Annual Employment & Wages, Select Private Industries (2012)

	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
Professional and Business Services	2,001	15,542	\$53,083
Financial Activities	883	6,418	\$56,412
Construction	761	4,344	\$36,797
Information	171	2,929	\$48,523
Manufacturing	121	1,660	\$50,512
Florida			
Professional and Business Services	139,196	1,073,949	\$53,121
Financial Activities	65,547	493,290	\$61,400
Construction	57,598	342,432	\$41,561
Information	10,215	133,749	\$66,794
Manufacturing	18,372	316,751	\$53,284

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

2.8 Occupational Employment and Wages

The 2013 estimated average hourly wage for all occupations in the Tallahassee MSA is \$20.25 with the average wage being \$25.77 per hour for experienced workers in their occupation.

Figure 2-14
Occupational Emp. and Wages, 1,000+ Employment,
Tallahassee MSA (2013)

Occupational Title	2012 Emp.	Hourly Wage (2013 Wage Estimates in dollars)			
		Mean	Median	Entry*	Exp.**
Total All Occupations	156,380	\$20.25	\$15.66	\$9.22	\$25.77
Retail Salespersons	5,810	\$11.49	\$9.70	\$8.25	\$13.11
Management Analysts	4,510	\$26.79	\$22.97	\$18.45	\$30.97
Cashiers	4,240	\$8.94	\$8.92	\$8.27	\$9.29
Comb. Food Pre. & Serving Workers, Inc. Fast Food	4,120	\$8.52	\$8.75	\$8.20	\$8.68
Office Clerks, General	3,540	\$11.66	\$10.90	\$8.34	\$13.32
Secretaries, Except Legal, Medical, and Executive	3,410	\$14.78	\$14.13	\$10.31	\$17.01
Waiters and Waitresses	3,390	\$9.15	\$8.86	\$8.22	\$9.61
Registered Nurses	3,280	\$27.40	\$26.89	\$21.15	\$30.53
Janitors and Cleaners, Ex.Maids and Hskping.	2,920	\$9.70	\$9.23	\$8.22	\$10.43
Accountants and Auditors	2,740	\$25.44	\$22.19	\$15.15	\$30.59
Customer Service Representatives	2,700	\$13.63	\$12.81	\$9.60	\$15.65
Executive Secretaries and Administrative Assistants	2,500	\$17.40	\$16.39	\$12.69	\$19.77
Lawyers	2,210	\$49.00	\$41.69	\$27.97	\$59.51
Business Operations Specialists, All Other	2,120	\$29.90	\$28.05	\$18.35	\$35.68
Bookkeeping, Accounting, and Auditing Clerks	1,860	\$15.97	\$15.53	\$11.21	\$18.34
Stock Clerks and Order Fillers	1,840	\$10.80	\$10.33	\$8.28	\$12.06
First-Line Supervisors/Mgrs of Retail Sales Workers	1,590	\$19.56	\$17.31	\$12.47	\$23.10
Receptionists and Information Clerks	1,530	\$12.45	\$12.29	\$9.14	\$14.10
General and Operations Managers	1,450	\$52.82	\$44.65	\$26.40	\$66.02
Comp. Ofcrs., Ex. Ag., Cons., Hlth., Safety & Trans.	1,430	\$18.00	\$16.13	\$13.19	\$20.41
First-Line Supers./Mgrs. of Ofc. & Admin. Sup. Wkrs.	1,380	\$22.06	\$21.58	\$14.38	\$25.90
Teacher Assistants	1,340	\$25,189	\$23,754	\$18,276	\$28,646
Maids and Housekeeping Cleaners	1,330	\$8.77	\$8.89	\$8.20	\$9.06
Maintenance and Repair Workers, General	1,330	\$15.73	\$15.33	\$11.83	\$17.69
Cooks, Restaurant	1,300	\$11.10	\$10.88	\$8.90	\$12.21
Postsecondary Teachers, all others	1,200	\$93,091	\$89,112	\$53,793	\$112,739
Nursing Assistants	1,180	\$11.35	\$11.10	\$9.96	\$12.04
Sales Reps., Whlsle. & Mfg. Exc. Tech. & Sci. Prods.	1,160	\$25.72	\$22.07	\$13.33	\$31.91
Elementary School Teachers, Except Spec. Education	1,050	\$44,106	\$43,249	\$32,898	\$49,709
Truck Drivers, Heavy and Tractor-Trailer	1,050	\$15.69	\$15.03	\$12.09	\$17.49
Sales Representatives, Services, All Other	1,010	\$26.02	\$19.29	\$13.29	\$32.39
Tax Examiners, Collectors, and Revenue Agents	1,010	\$18.59	\$15.87	\$13.20	\$21.29

* *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 Department of Economic Opportunity, Labor Market Information, Occ. Emp. Statistics & Wages

2.9 Per Capita Personal Income

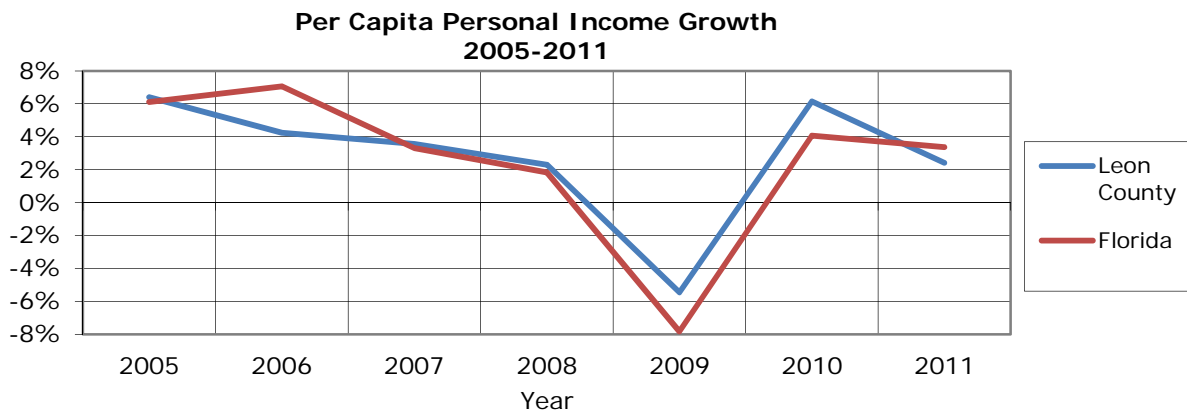
Per capita personal increased 2.4% in Leon County in 2011 and was 92.9% of the per capita income for the state. Since per capita personal income is calculated as the personal income of a given area divided by the resident population of the area, per capita personal income tends to be lower in Leon County due to the large number of college students residing in our community.

Figure 2-15
Per Capita Personal Income (2005-2011)

	2005	2006	2007	2008	2009	2010	2011
Leon County	\$32,446	\$33,820	\$35,021	\$35,827	\$33,874	\$35,957	\$36,823
% Change From Previous	6.4%	4.2%	3.6%	2.3%	-5.5%	6.1%	2.4%
Florida	\$35,489	\$37,996	\$39,256	\$39,978	\$36,849	\$38,345	\$39,636
% Change From Previous	6.1%	7.1%	3.3%	1.8%	-7.8%	4.1%	3.4%

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

Figure 2-16
Per Capita Personal Income Growth (2005-2011)



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

Section 3

Economic Factors

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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 come to the state on sales tax returns filed monthly by retail establishments with the Florida Department of Revenue. The overall level of taxable sales increased 2.9% in the Tallahassee MSA in 2012. Taxable sales for the State of Florida were up 6.1% in 2012 compared with 2011. By category, the two categories in the Tallahassee MSA that saw the greatest increase in taxable sales between 2011 and 2012 were Autos and Accessories, 10.3% and Building Investment, 5.3%. Two categories saw a decrease in taxable sales between 2011 and 2012: Business Investment, 2.0% and Consumer Durables, 1.8%. It is estimated that taxable sales comprise 40-45% of all retail sales.

Figure 3-1
Annual Taxable Sales, Tallahassee MSA and Florida (2002-2012)

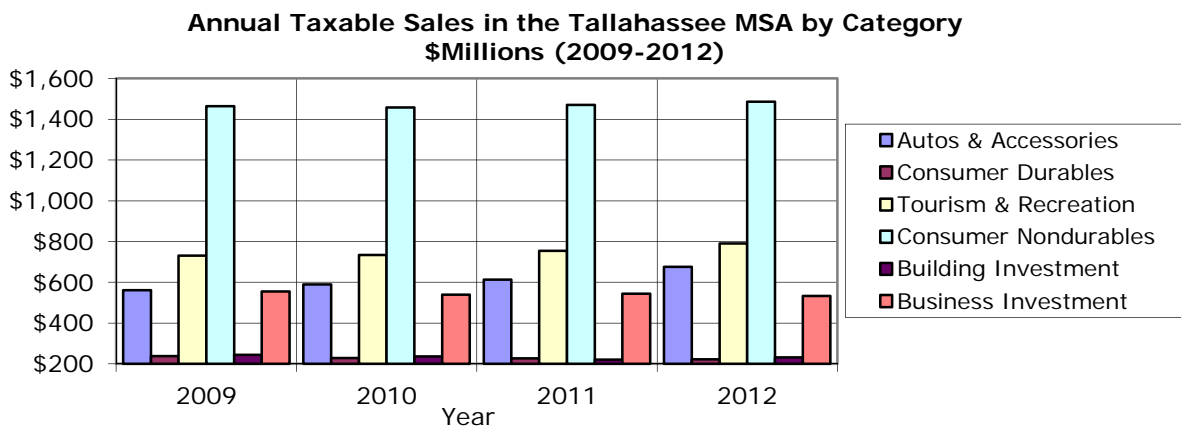
Year	Tallahassee MSA	Change from Previous Year	State of Florida	Change from Previous Year
2002	\$3,553.1	1.6%	\$252,910.9	-0.9%
2003	\$3,768.5	6.1%	\$266,335.7	5.3%
2004	\$3,995.5	6.0%	\$294,110.3	10.4%
2005	\$4,307.8	7.8%	\$327,787.6	11.5%
2006	\$4,437.9	3.0%	\$343,300.1	4.7%
2007	\$4,395.5	-1.0%	\$329,168.7	-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%
2012	\$3,941.3	2.9%	\$314,951.3	6.1%

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 (2009-2012)



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

Source: Florida Department of Revenue

3.2 FDIC Summary of Deposits

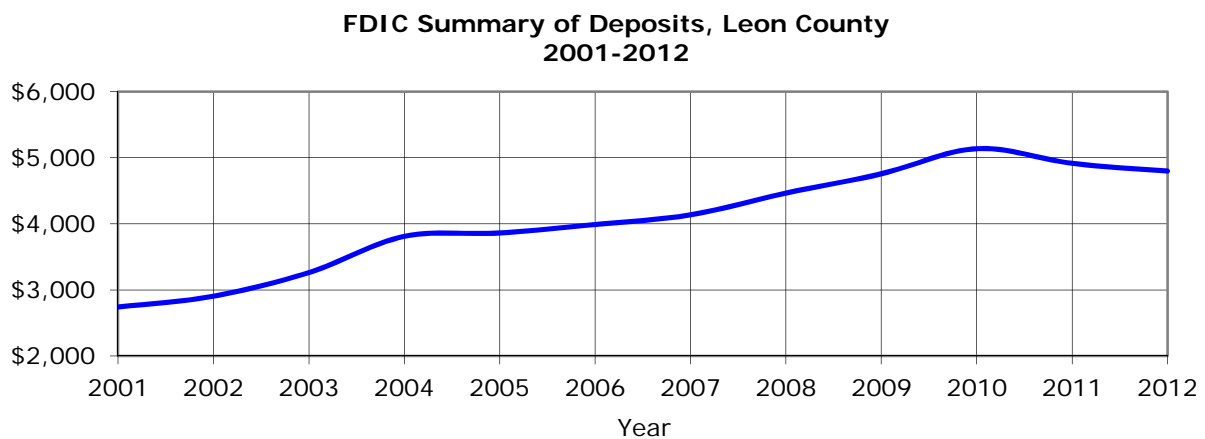
Nearly \$4.8 billion in deposits were held in Leon County in FDIC-insured institutions as of June 30, 2012. Total Leon County deposits declined 2.4% between 2011 and 2012. The Summary of Deposits (SOD) is the annual survey of branch office deposits as of June 30 for all FDIC-insured institutions, including insured U.S. branches of foreign banks

**Figure 3-3
FDIC Summary of Deposits (2001-2012)**

As of June 30	Leon County - All Institutions Number of			Florida - All Institutions Number of		
	Institutions	Offices	Deposits	Institutions	Offices	Deposits
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
2012	18	93	\$4,796	292	5,602	\$423,908

*Note: Deposits in \$Millions of dollars
Source: FDIC, Summary of Deposits*

**Figure 3-4
FDIC Summary of Deposits, Leon County (2001-2012)**



*Note: Deposits in \$Millions of dollars
Source: FDIC, Summary of Deposits*

3.3 Annual Visitor Trends

In calendar year 2012, more than 2.4 million people (person visits) visited Leon County, down 5.2% from calendar year 2011 levels. Visitor spending totaled \$623.6 million in 2012, 8.1% higher than total non-inflation adjusted visitor spending in 2011.

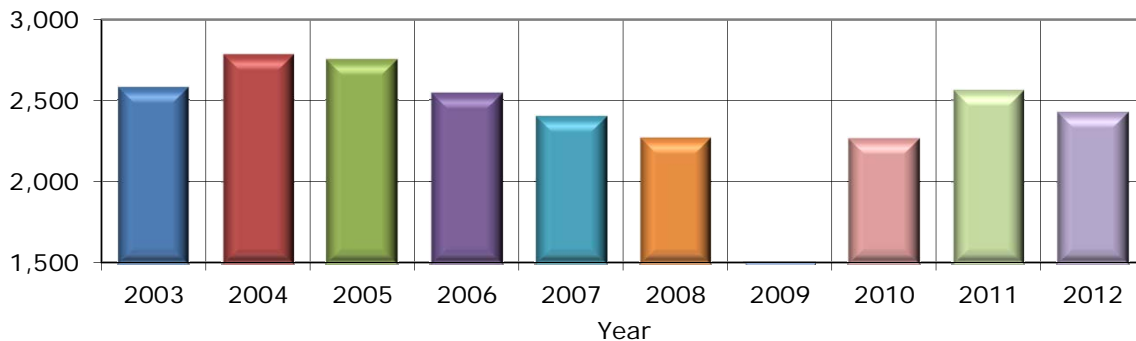
**Figure 3-5
Annual Visitor Trends-Person Visits (2003-2012)**

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Person Visits	2,579	2,784	2,751	2,545	2,402	2,270	n/a	2,266	2,564	2,430

Note: Data in Thousands

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

**Annual Visitor Trends (Person Visits in Thousands)
2003-2012**



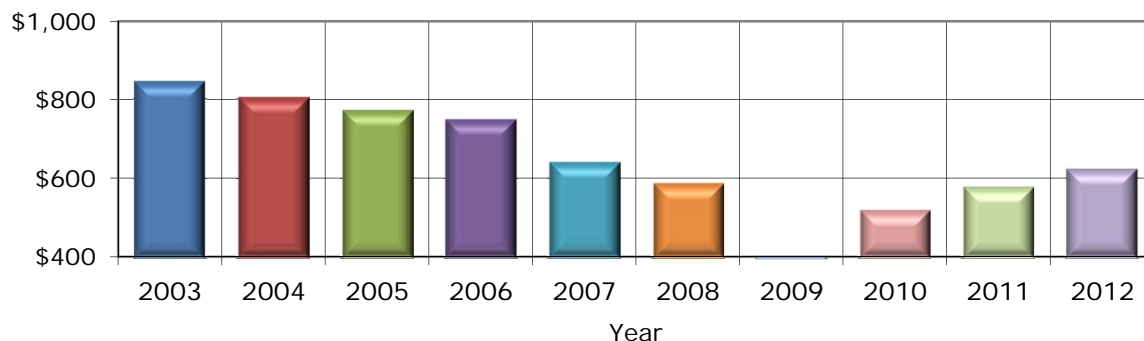
**Figure 3-6
Annual Visitor Trends-Annual Visitor Spending (2003-2012)**

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Visitor Spending	\$845	\$805	\$772	\$749	\$641	\$587	n/a	\$518	\$577	\$624

Note: Data in Millions

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

**Annual Visitor Trends (Visitor Spending in Millions)
2003-2012**



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 (2008-2012)

County	2008	2009	2010	2011	2012
Leon	94.07	93.68	94.39	94.08	93.87
Gadsden	91.59	92.29	94.05	93.74	92.97
Jefferson	91.34	90.97	92.50	91.38	91.15
Wakulla	91.64	91.27	91.96	92.94	94.74

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 2012, the ten counties with index values above 101.22 together account for 48.6% of the state's population.

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

3.5 Gross Domestic Product by Metro. Area

In 2011, the Tallahassee Metropolitan Area's (MSA) gross domestic product was \$13.5 billion, up \$0.3 billion from 2010. Real GDP in metropolitan area increased 1.6% in 2011 after increasing 3.1% in 2010. Real GDP increased in 242 of the nation's 366 metropolitan areas in 2011 led by growth in professional and business services, durable-goods manufacturing and trade.

Figure 3-8

Gross Domestic Product by Metro. Area, US\$, Billions (2006-2011)

City	2006	2007	2008	2009	2010	2011	2011 MSA Ranking (out of 366 MSAs)
Tampa	110.3	114.4	112.4	110.9	112.4	116.2	24
Orlando	98.9	104.5	102.1	98.9	99.5	102.1	30
Jacksonville	58.4	60.3	58.9	57.5	59.3	60.7	47
Pensacola	13.4	13.8	13.5	13.6	13.9	14.5	142
Tallahassee	12.2	13.1	13.2	13.2	13.2	13.5	145
Gainesville	9.1	9.8	10.0	10.1	10.3	10.5	175
Panama City	6.2	6.4	6.5	6.5	6.5	6.5	231

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

3.6 Consumer Price Index (CPI-U)

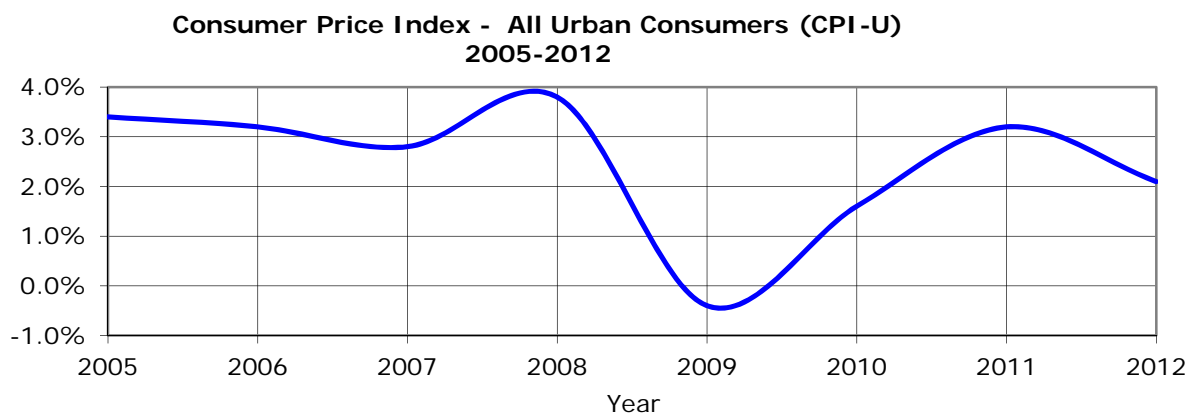
The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 2.1% in 2012 following a 3.2% increase in 2011.

Figure 3-9
Consumer Price Index for all Urban Consumers (CPI-U, 2005-2012)

	2005	2006	2007	2008	2009	2010	2011	2012
U.S. City Average	195.3	201.6	207.3	215.3	214.5	218.1	224.9	229.6
% Change from Previous	3.4%	3.2%	2.8%	3.8%	-0.4%	1.6%	3.2%	2.1%

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

Figure 3-10
Annual Change in the Consumer Price Index (CPI-U, 2005-2012)



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

3.7 Airport Traffic Statistics

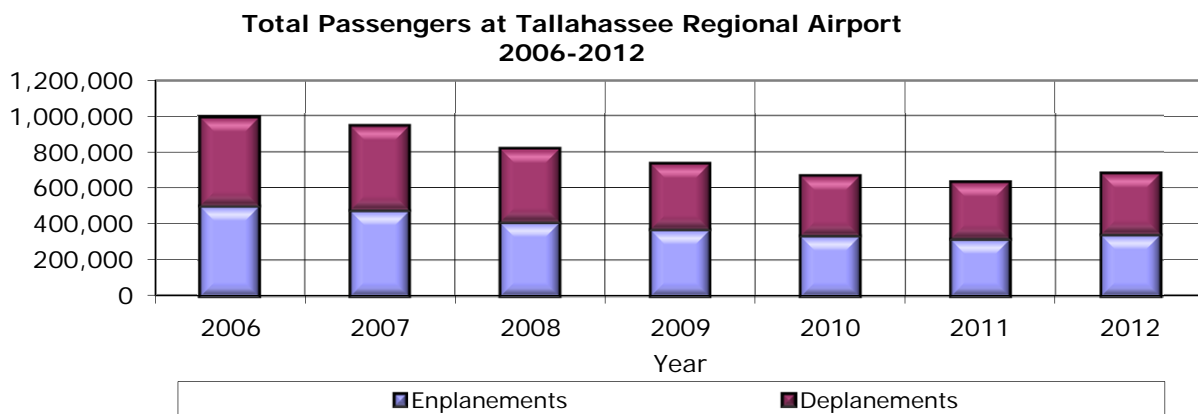
Passenger traffic at Tallahassee Regional Airport was up nearly 8% in 2012 compared with 2011 levels following seven straight years of annual declines in the number of total passengers.

Figure 3-11
Tallahassee Regional Airport Traffic Statistics (2006-2012)

	2006	2007	2008	2009	2010	2011	2012
Enplanements	501,158	475,612	411,532	371,106	336,598	318,172	344,281
Deplanements	492,702	471,553	409,411	366,579	334,099	318,619	340,727
Total Passengers	993,860	947,165	820,943	737,685	670,697	636,791	685,008

Source: City of Tallahassee, Aviation Department

Figure 3-12
Total Passengers at Tallahassee Regional Airport (2006-2012)



Source: City of Tallahassee, Aviation Department

Section 4

Education

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4.1 Higher Education Institutions Enrollment

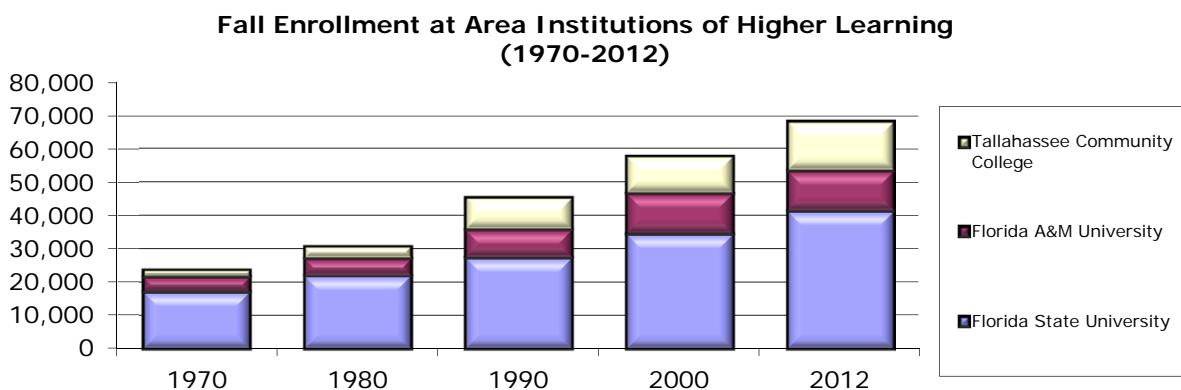
Fall 2012 enrollment at the three largest institutions for higher learning in Leon County were all down slightly according to preliminary fall 2012 data.

Figure 4-1
Fall Enrollment at area Institutions of Higher Learning (1960-2012)

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	12,177	13,439	65,268
2006	40,474	11,913	13,526	65,913
2007	41,065	11,567	13,891	66,523
2008	39,136	11,848	14,016	65,000
2009	40,255	12,261	14,472	66,988
2010	40,838	13,277	14,756	68,871
2011	41,710	13,207	15,338	70,255
2012	41,301	12,051	14,849	68,201

Source: State University System of Florida, Board of Governors; Office of Institutional Research, Budget & Analysis Dept, Florida State University; Institutional Research Office, Tallahassee Community College

Figure 4-2
Fall Enrollment at Area Institutions of Higher Learning (1970-2012)



Source: State University System of Florida, Board of Governors; Office of Institutional Research, Budget & Analysis Dept, Florida State University; Institutional Research Office, Tallahassee Community College

4.2 Leon County Public Schools Statistics

Leon County public school enrollment (K-12) increased marginally in the 2012-13 school year. The dropout rate for grades 9-12 decreased to 0.8% in the 2011-2012 school year.

Figure 4-3
Leon County Public School Enrollment, K-12 (1960-61-2012-13)

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
2012-13	32,338

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

Figure 4-4
Leon County Public School Dropout Statistics, Grades 9-12 (1996-97-2011-12)

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%
2011-12	0.8%

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

4.3 Leon County Public School Grades

Seventy-one percent of Leon County Schools received an A or B grade in the 2011-12 school year.

Figure 4-5
Leon County Public School Grades, K-12 (2008-2013)

School Name	2013 Grade	2012 Grade	2011 Grade	2010 Grade	2009 Grade	2008 Grade
Amos P. Godby High School	Pending	B	C	B	F	C
Apalachee Elementary School	C	D	C	C	C	C
Astoria Park Elementary School	C	B	A	A	A	B
Augusta Raa Middle School	C	B	A	A	A	A
Belle Vue Middle School					C	D
Bond Elementary School	D	C	C	B	B	C
Buck Lake Elementary School	A	A	A	A	A	A
C.K. Steele-Leroy Collins Charter M.S.	F	D	C	C	B	C
Canopy Oaks Elementary School	B	A	A	A	A	A
Chaires Elementary School	B	A	A	A	A	B
Deerlake Middle School	A	A	A	A	A	A
Desoto Trail Elementary School	A	A	A	A	A	A
Elizabeth Cobb Middle School	B	A	A	A	A	A
Fairview Middle School	B	B	B	A	B	B
Fort Braden Elementary School	C	C	B	C	B	B
Frank Hartsfield Elementary School	C	B	C	C	B	A
Gilchrist Elementary School	A	A	A	A	A	A
Governors Charter Academy	C					
Griffin Middle School	D	C	C	C	C	C
Hawks Rise Elementary School	A	A	A	A	A	A
Imagine School at Evening Rose	C	C	C	A	F	
J. Michael Conley Elementary School	B	A	A	B	A	
James Rickards High School	Pending	C	B	A	D	C
John G. Riley Elementary School	C	C	B	C	A	B
Kate Sullivan Elementary School	B	A	B	B	B	A
Killlearn Lakes Elementary School	A	A	A	A	A	A
Lawton Chiles High School	Pending	A	A	A	B	A
Leon High School	Pending	A	B	B	C	A
Lillian Ruediger Elementary School	C	B	C	C	A	B
Lincoln High School	Pending	A	B	A	B	A
Oak Ridge Elementary School	D	C	B	C	A	C
Pineview Elementary School	C	B	C	A	B	A
R. Frank Nims Middle School	D	D	C	F	D	C
Roberts Elementary School	A	A	B	A	A	A
Sabal Palm Elementary School	C	C	B	B	B	C
Sail	Pending	A	A	B	B	A
Sealey Elementary School	B	A	B	B	A	A
Springwood Elementary School	C	C	B	C	A	C
Stars Middle School	C	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	B	A	B	A	A	A
William J. Montford III Middle School	A	A	A	A	A	
Woodville Elementary School	C	B	A	B	B	D

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 (2006-07-2012-13)

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Leon County School District	1,056	1,074	1,076	1,078	1,065	1,050	n/a
State Of Florida Average	993	990	991	991	976	984	n/a
U.S. Average	1,017	1,014	1,013	1,015	1,011	1,010	n/a

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 (2006-07-2012-13)

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Leon County School District	21.0	21.0	20.6	20.1	21.1	20.9	n/a
State Of Florida Average	19.9	19.8	19.5	19.5	19.6	19.8	n/a
U.S. Average	21.2	21.1	21.1	21.0	21.1	21.1	n/a

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

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5.1 History of Tallahassee/Leon County

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

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

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

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

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

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

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

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

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

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

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

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

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

1783 Spain regains possession of Florida.

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

1819 Florida is ceded by Spain to the United States.

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

5.2 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, 2013. 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 (1927-2012)

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
2012	103.25	0.00	103.25

Source: City of Tallahassee, Public Works Department, Engineering

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

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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
2012	103.25	0.00	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

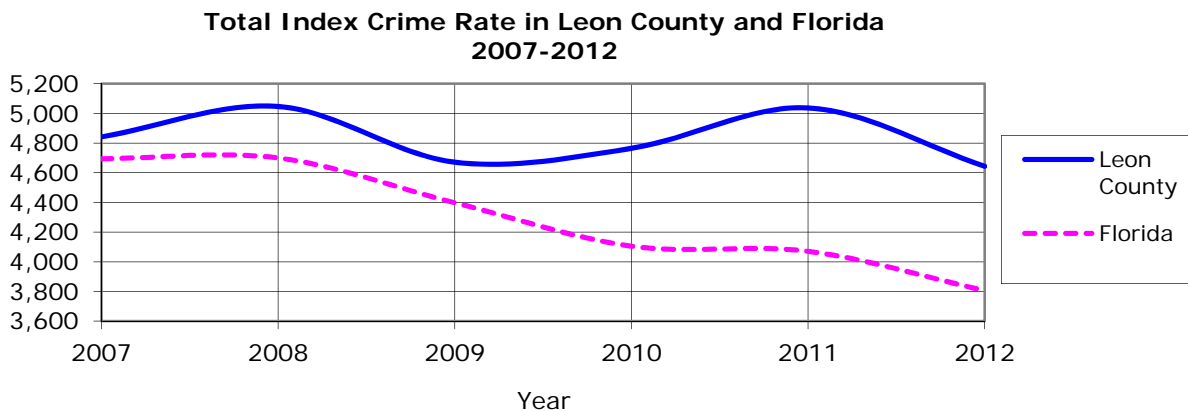
Between 2011 and 2012, Leon County experienced a 7.8% decrease in the total crime index rate (rate per 100,000 population) compared to a 6.5% decrease for the State of Florida. The index rate for violent crimes in Leon County decreased 8.3% in 2012 over 2011 levels. Property Crime rates decreased 7.7% between 2011 and 2012 with the rate of burglaries down 17.3% during the period and a 30.7% increase in the rate of motor vehicle thefts.

Figure 5-3
Leon County Crime Rates, Rate per 100,000 Residents (2007-2012)

Type of Crime	2007	2008	2009	2010	2011	2012	Avg. Annual Rate Change (2007-2012)
Violent Crimes	815.7	839.6	742.0	762.6	735.1	674.2	-3.8%
Murder	1.8	5.1	3.6	5.5	5.1	6.1	24.4%
Forcible Sex Offenses	102.6	81.5	52.8	86.6	77.8	69.9	-7.7%
Robbery	239.7	266.3	196.9	196.1	208.1	207.4	-2.9%
Aggravated Assault	471.6	486.7	488.7	474.4	444.1	390.8	-3.8%
Property Crime	4,026.1	4,207.1	3,929.0	4,002.1	4,301.8	3,969.1	-0.3%
Burglary	1,253.6	1,341.6	1,459.2	1,279.6	1,470.3	1,216.6	-0.6%
Larceny	2,482.6	2,627.6	2,310.4	2,553.7	2,654.9	2,521.7	0.3%
Motor Vehicle Theft	289.9	237.9	159.4	168.8	176.6	230.8	-4.6%
Index Rate (per 100,000)	4,841.8	5,046.7	4,671.0	4,764.7	5,037.0	4,643.3	-0.8%

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

Figure 5-4
Total Index Crime Rate in Leon County and Florida (2007-2012)



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 (2012)

Taxing Authority	Millage Rate	Where Tax is Applied
Leon County Commission		
General Property Tax	8.3144	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	5.4590	Anywhere in Leon County
Local Board	2.2480	Anywhere in Leon County
Tallahassee City Commission	3.7000	Within City Limits Only
Downtown Improvement Authority	1.0000	In the Downtown Area Only
NW Florida Water Mgmt. District	0.0400	Anywhere in Leon County
Inside City Limits Total	20.2614	
Outside City Limits Total	16.5614	
Downtown Improvement Area	21.2614	

Source: Leon County Property Appraiser

Section 6

Residential and Commercial Development

Topics

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6.1 Residential Development

The overall level of residential building permits for new construction issued in Leon County increased in 2012. However, for the second calendar year in a row, 2012 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 were up in 2012 with six larger apartment communities permitted (601 South Copeland, Capital Place at Southwood, Catalyst, Collegetown, Luxe on West Call and the U Club on Woodward).

Figure 6-1
Residential Building Permits Issued (New Construction) By Type
in Leon County (1985-2012)

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
2012	283	44	847	1,174	54	1,228

*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 125,260 residential housing units in Leon County as of 2012, 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
2012(e)	85,055	40,205	125,260
2020(p)	92,318	40,986	133,304
2030(p)	101,924	42,499	144,423
2040(p)	108,883	43,634	152,517

Sources: U.S. Department of Commerce, Bureau of the Census (1970-2010), Tallahassee-Leon County Planning Department Estimates and Projections (2012-2040)

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

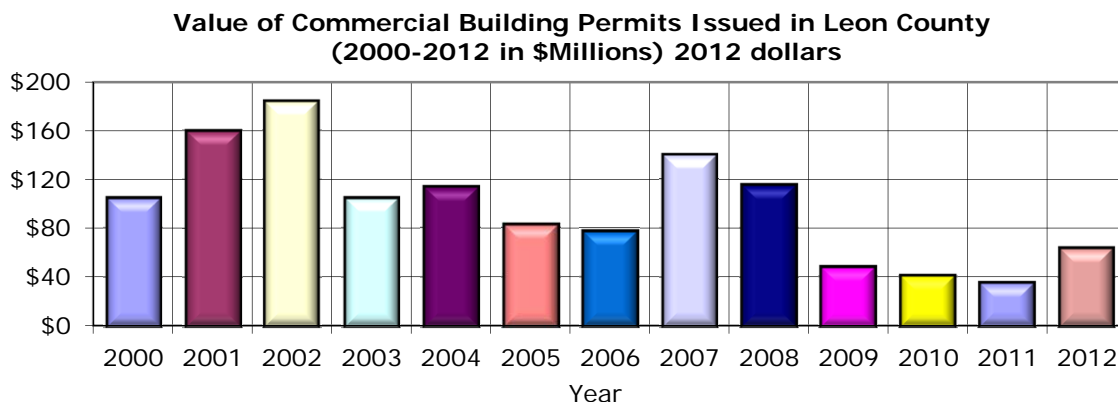
The value of commercial permits issued for new construction in 2012 was up in comparison with 2011 permits (when the annual value of new commercial construction permits reached their lowest annual value since 1993). Note: For the purposes of this comparison, the valuation of permits to construct new public facilities are not included in these totals.

Figure 6-4
Commercial Building Permits Issued (New Construction) in Leon County (2000-2012)

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2012 Dollars (\$Millions)
2000	119	\$78.7	\$104.9
2001	140	\$123.5	\$160.1
2002	129	\$144.3	\$184.2
2003	104	\$84.1	\$104.9
2004	106	\$93.4	\$113.5
2005	98	\$70.5	\$82.9
2006	109	\$68.0	\$77.4
2007	83	\$126.4	\$140.0
2008	88	\$108.5	\$115.7
2009	48	\$45.2	\$48.4
2010	30	\$39.0	\$41.1
2011	26	\$34.7	\$35.4
2012	54	\$63.7	\$63.7

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 (2000-2012)



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

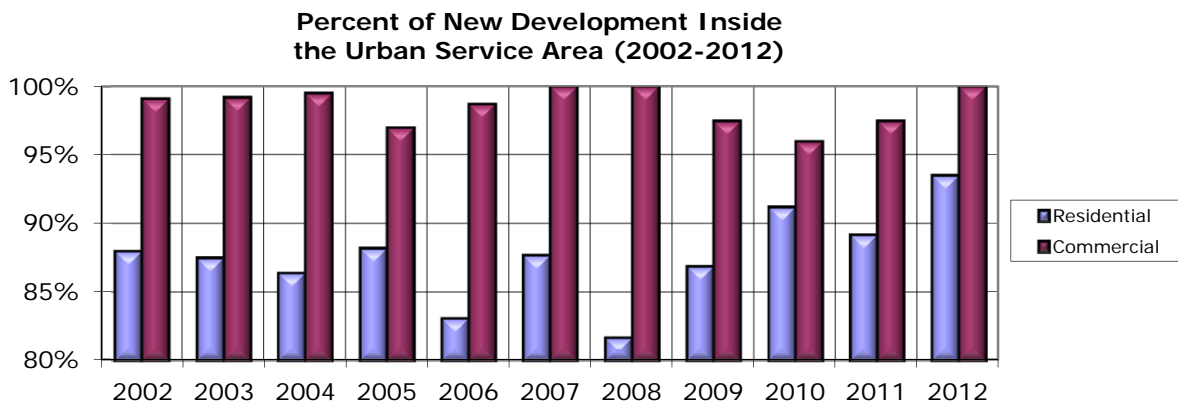
The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA). The location and size of the USA is based upon the area necessary to accommodate 90% of new residential dwelling units within the County by the Plan Horizon. The percentage of new residential development constructed within the approximate 161 square mile USA in 2012 was 93.5%.

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%
2012	93.5%	100.0%

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 (2002-2012)



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 decreased as of year-end 2012 to 20.0% (from 20.9% for year-end 2011).

**Figure 6-8
Office Market Survey (Year-End 2012)**

Market	Number of Properties	Square Feet Surveyed	Square Feet Vacant	Percent Vacant	Asking Rents*
Downtown	17	956,506	173,297	18.1%	\$18.00-\$26.00**
Northeast	67	1,884,653	284,471	15.1%	\$14.00-\$23.00
Northwest/West	17	1,168,537	229,621	19.7%	\$12.00-\$18.00
Southeast	30	2,724,233	659,897	24.2%	\$12.00-\$18.50
Total	131	6,733,929	1,347,286	20.0%	\$12.00-\$26.00

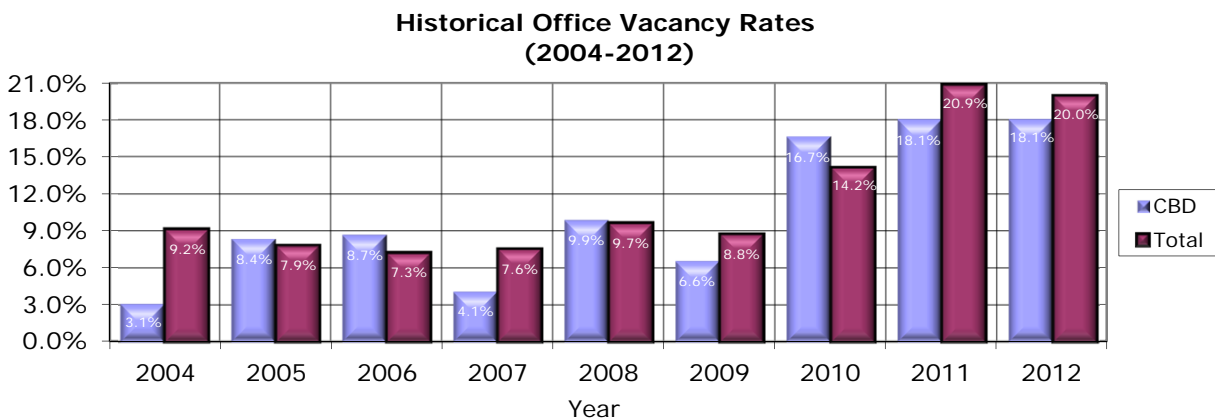
*All rents adjusted to full service (operating expenses include utilities and janitorial)

**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 (2004-2012)**



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

Note: Data for years 2004-2009 represent first quarter data, 2010-2012 represent end-of-year data.

6.6 Apartment Market Summary

The apartment vacancy rate in Tallahassee increased from 8.1% in September 2011 to 9.4% in September 2012. The average monthly rent is 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 (2005-2012)

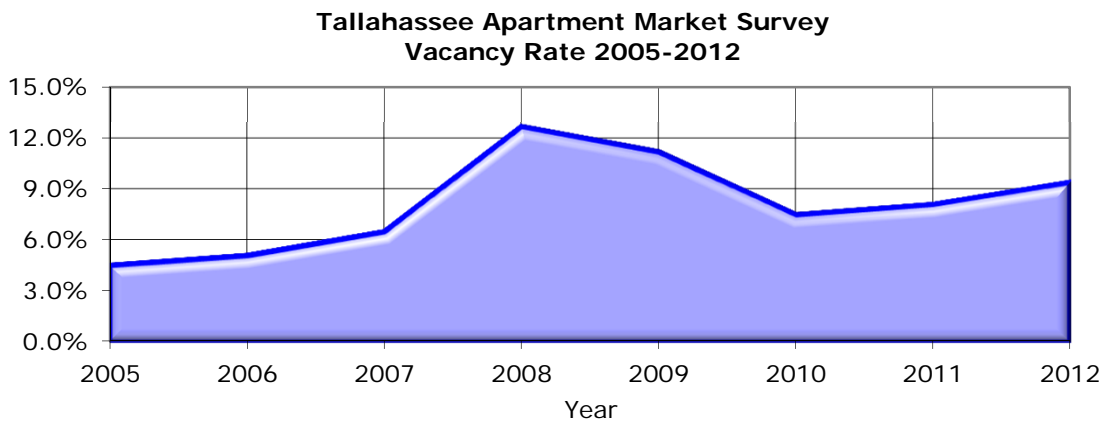
	Sept. 2005	Sept. 2006	Sept. 2007	Sept. 2008	Sept. 2009	Sept. 2010	Sept. 2011	Sept. 2012
Total Units Surveyed	18,000	18,560	17,722	18,348	19,307	18,829	19,419	20,217
Vacant Units	817	943	1,149	2,328	2,163	1,407	1,573	1,902
Vacancy Rate	4.5%	5.1%	6.5%	12.7%	11.2%	7.5%	8.1%	9.4%
Average Sq. Ft.	1,000-	950-	950-	1,000-	1,000-	1,000-	1,000-	1,000-
Range	1,050	1,000	1,000	1,050	1,050	1,050	1,050	1,050
Average Rent per	\$800-	\$850-	\$850-	\$900-	\$900-	\$900-	\$950-	\$950-
Month Range	\$850	\$900	\$900	\$950	\$950	\$950	\$1,000	\$1,000

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

Total units represents the total numbers of apartments surveyed and not necessarily the entire size of the market.

Source: Real Data, 2012 Tallahassee Apartment Index, www.apindex.com, October 2012

Figure 6-11
Apartment Market Vacancy Rate (2005-2012)



Source: Real Data, 2012 Tallahassee Apartment Index, www.apindex.com, October 2012

6.7 Median Residential Sale Prices

The median sales price of a detached single-family home in Leon County decreased 1.3% per quarter on average between first quarter 2008 and fourth quarter 2012. Over the past eleven years, (first quarter 2001 to first quarter 2012) the median sales price increased on average 0.6% per quarter.

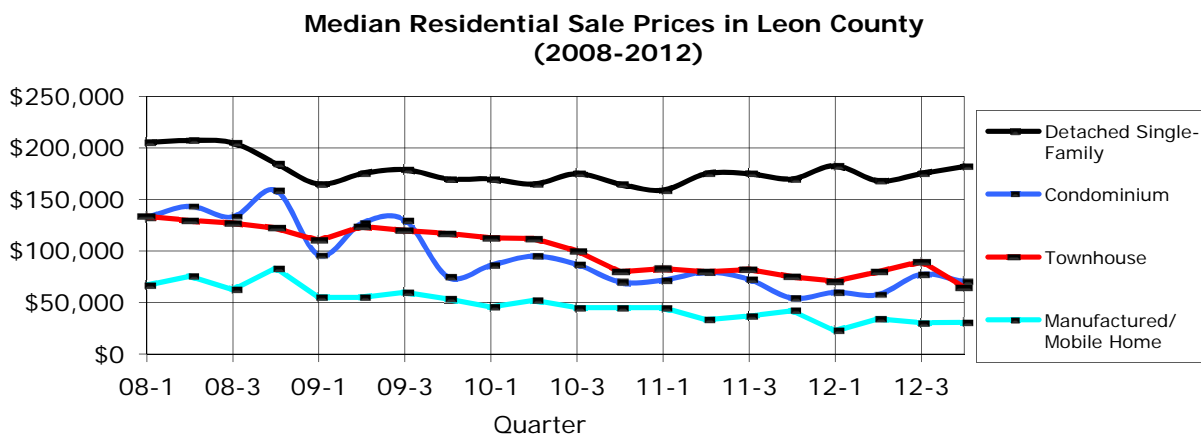
Figure 6-12
Median Residential Sale Prices in Leon County (2008-2012)

Quarter	Detached Single-Family	Condominium	Townhouse	Manufactured/ Mobile Home
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
2012-1	\$183,000	\$60,000	\$70,794	\$22,500
2012-2	\$168,000	\$57,750	\$80,000	\$34,200
2012-3	\$175,000	\$77,500	\$90,000	\$30,500
2012-4	\$181,950	\$70,000	\$64,900	\$30,945

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 6-13
Median Residential Sale Prices in Leon County (2008-2012)



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

Source: Tallahassee Real Estate N Data Services (TRENDS)

6.8 Mortgage Foreclosure Cases

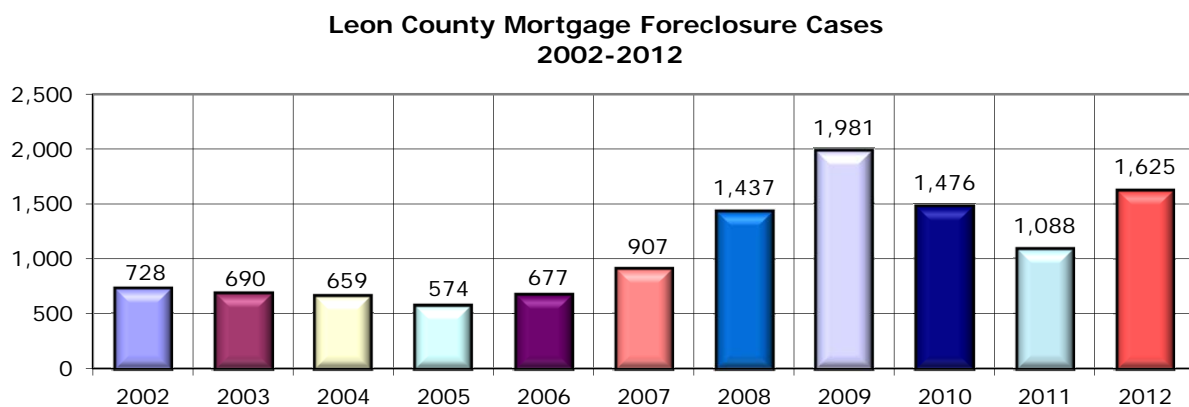
After declining for two straight years, mortgage foreclosure cases increased considerably in 2012. There were 1,625 mortgage foreclosure cases in Leon County in 2012 according to the Leon County Clerk of Courts (up 49.4% from 2011).

Figure 6-14
Leon County Mortgage Foreclosure Cases (2002-2012)

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%
2012	1,625	49.4%

Source: Leon County Clerk of Courts

Figure 6-15
Leon County Mortgage Foreclosure Cases (2002-2012)



Source: Leon County Clerk of Courts