

TALLAHASSEE-LEON COUNTY PLANNING DEPARTMENT
2015 Statistical Digest
December 2015

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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 (1930-2015)**

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
2015	187,996	96,447	284,443

Sources: U.S. Department of Commerce, Bureau of the Census (1930-2010), University of Florida, Bureau of Economic and Business Research (2015 estimate)

**Figure 1-2
Population Projections (2020-2040)**

Year	City of	Unincorporated	
	Tallahassee	Leon County	Leon County
2020	199,500	98,800	298,300
2025	210,200	101,000	311,200
2030	220,700	103,100	323,800
2035	230,700	105,100	335,800
2040	239,500	106,900	346,400

Sources: University of Florida, Bureau of Economic and Business Research (2020-2040 Leon County projections); Tallahassee-Leon County Planning Department (City of Tallahassee and Unincorporated Leon County 2020-2040 projections assuming continued annexations and share of population growth captured by the City between 2000 and 2015 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 26.05 (inclusive of (Southwood), CT 5 (multi-family units) and CT 24.17 (inclusive of Bull Run) are estimated to have added the most residents since Census 2010.

Figure 1-3
Population Growth by Census Tract, (2010-2014)

Census Tract	Total Population 2010 Census	Total Population 2014 Estimate	Estimated Total Population Change, 2010-2014	Census Tract	Total Population 2010 Census	Total Population 2014 Estimate	Estimated Total Population Change, 2010-2014
2	3,737	3,755	18	21.03	3,418	3,418	0
3.01	1,546	1,544	-2	21.04	7,310	7,711	401
3.02	2,334	2,343	9	22.01	5,016	5,338	322
3.03	3,628	3,648	20	22.05	5,642	5,784	142
4	2,393	2,404	11	22.06	3,168	3,168	0
5	2,433	3,067	634	22.07	2,242	2,247	5
6	3,858	3,836	-22	22.08	4,771	4,779	8
7	2,004	2,006	2	23.02	3,342	3,413	71
8	2,973	2,981	8	23.03	3,930	4,024	94
9.01	7,989	7,988	-1	23.04	2,898	2,965	67
9.03	2,144	2,142	-2	24.03	2,676	2,694	18
9.04	3,313	3,313	0	24.08	7,745	7,823	78
9.05	2,593	2,593	0	24.10	6,018	6,048	30
10.01	2,692	2,653	-39	24.11	1,609	1,645	36
10.02	2,188	2,188	0	24.12	9,050	9,184	134
11.01	2,896	2,882	-14	24.13	2,464	2,598	134
11.02	2,503	2,550	47	24.14	4,273	4,275	2
12	1,314	1,324	10	24.15	4,323	4,327	4
13	6,552	6,552	0	24.16	2,774	2,878	104
14.01	2,932	2,609	-323	24.17	7,207	7,793	586
14.02	4,791	4,761	-30	25.05	5,641	5,784	143
15	4,475	4,477	2	25.07	2,538	2,600	62
16.01	4,577	4,607	30	25.08	9,064	9,367	303
16.02	3,091	3,098	7	25.09	3,653	3,663	10
17	7,270	7,330	60	25.10	7,397	7,494	97
18.01	3,966	4,104	138	25.11	1,292	1,302	10
18.02	5,207	5,277	70	25.12	3,346	3,596	250
19.01	3,035	3,033	-2	25.13	3,598	3,688	90
19.02	4,062	4,102	40	26.03	4,991	5,121	130
20.03	2,298	2,300	2	26.04	3,108	3,207	99
20.04	7,383	7,383	0	26.05	4,218	5,258	1,040
20.05	3,326	3,589	263	26.06	3,232	3,280	48
20.06	3,472	3,540	68	27.01	4,978	5,097	119
21.01	4,675	4,680	5	27.02	4,905	5,064	159

Sources: U.S. Department of Commerce, Bureau of the Census, Census 2010; University of Florida, Bureau of Economic and Business Research, 2014 Leon County Estimates; Tallahassee-Leon County Planning Department, Census Tract Estimates

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 21.6% (behind Alachua County) and the second smallest percentage aged 65 and older at 11.4% (behind Union County) in the State of Florida.

Figure 1-4
Leon County Population by Age and Gender (2014 Estimate)

Age Group	Total Population	Percent of Population	Female	Percent of Population	Male	Percent of Population
0 to 4	15,357	5.5%	7,520	2.7%	7,837	2.8%
5 to 17	39,862	14.2%	19,764	7.0%	20,098	7.1%
18 to 24	60,631	21.6%	32,371	11.5%	28,260	10.0%
25 to 54	102,555	36.5%	52,751	18.8%	49,804	17.7%
55 to 64	30,950	11.0%	16,562	5.9%	14,388	5.1%
65 to 79	24,208	8.6%	13,035	4.6%	11,173	4.0%
80+	7,729	2.7%	4,957	1.8%	2,772	1.0%
Total	281,292	100.0%	146,960	52.2%	134,332	47.8%

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 172", June 2015

Figure 1-5
Leon County Population Growth by Age Group (2010-2014)

Age Group	2010 Population	2014 Population Estimate	Growth in Population 2010-2014	Percent Growth 2010-2014	Avg. Ann. Growth 2010-2014
0 to 4	15,350	15,357	7	0.0%	0.0%
5 to 17	38,623	39,862	1,239	3.2%	1.1%
18 to 24	61,897	60,631	-1,266	-2.1%	-0.7%
25 to 54	103,907	102,555	-1,352	-1.3%	-0.4%
55 to 64	29,730	30,950	1,220	4.0%	1.3%
65 to 79	18,962	24,208	5,246	24.4%	8.1%
80+	7,018	7,729	711	9.7%	3.2%
Total	275,487	281,292	5,805	2.1%	0.7%

Source: University of Florida, Bureau of Economic & Business Research, "Florida Population Studies, Bulletin 172", June 2015; 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% White, 31.5% Black and 3.5% Other Races. Also, 5.8% of Leon County residents are of Hispanic origin.

Figure 1-6
Leon County Population by Age, Race and Ethnicity (2014 Estimate)

Age Group	All Races	White	Black	Other	Hispanic Origin
0 to 4	15,357	6,989	6,603	698	1,067
5 to 17	39,862	19,773	15,862	1,566	2,661
18 to 24	60,631	33,524	20,108	1,799	5,200
25 to 54	102,555	59,704	32,557	4,534	5,760
55 to 64	30,950	21,959	7,283	794	914
65 to 79	24,208	18,469	4,650	490	599
80+	7,729	6,049	1,432	84	164
Total	281,292	166,467	88,495	9,965	16,365

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 172", June 2015

Figure 1-7
Leon County Pop. by Percentage, Race & Ethnicity (2014 Estimate)

Age Group	White	Black	Other	Hispanic Origin
0 to 4	45.5%	43.0%	4.5%	6.9%
5 to 17	49.6%	39.8%	3.9%	6.7%
18 to 24	55.3%	33.2%	3.0%	8.6%
25 to 54	58.2%	31.7%	4.4%	5.6%
55 to 64	70.9%	23.5%	2.6%	3.0%
65 to 79	76.3%	19.2%	2.0%	2.5%
80+	78.3%	18.5%	1.1%	2.1%
Total	59.2%	31.5%	3.5%	5.8%

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

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 172, June 2015

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, 91.4% of Leon County's population growth is attributable to net natural increase (total births less total deaths).

**Figure 1-8
Components of Population Change (2010-2014)**

	Leon County	State of Florida
Total Population Change (2010-2014)	5,805	706,037
Net Natural Increase	5,305	154,676
Births	12,159	855,904
Deaths	6,854	701,228
Net Migration	500	551,361
Percent due to Natural Increase	91.4%	21.9%
Percent due to Net Migration	8.6%	78.1%

Source: University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2014

**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 375,270 in 2014, up 2.1% from 2010.

Figure 1-10
Population Growth in Florida Metropolitan Areas (2000-2014)

Metropolitan Area/County(ies)	2014 Population Estimate	2010 Census Population	2000 Census Population	Percent Change 2000-2010
All Metropolitan Areas	18,800,745	17,689,986	15,023,351	17.7%
Miami-Fort Lauderdale-West Palm Beach (<i>Broward, Miami-Dade, Palm Beach</i>)	5,777,833	5,564,657	5,007,988	11.1%
Tampa-St. Petersburg-Clearwater (<i>Hernando, Hillsborough, Pasco, Pinellas</i>)	2,889,440	2,783,243	2,396,013	16.2%
Orlando-Kissimmee-Sanford (<i>Lake, Orange, Osceola, Seminole</i>)	2,270,370	2,134,411	1,644,563	29.8%
Jacksonville (<i>Baker, Clay, Duval, Nassau, St. Johns</i>)	1,397,224	1,345,596	1,122,750	19.8%
North Port-Sarasota-Bradenton (<i>Manatee, Sarasota</i>)	726,685	702,281	589,963	19.0%
Cape Coral-Fort Myers (<i>Lee</i>)	653,485	618,754	440,888	40.3%
Lakeland-Winter Haven (<i>Polk</i>)	623,174	602,095	483,924	24.4%
Deltona-Daytona Beach-Ormond Beach (<i>Volusia, Flagler</i>)	602,972	590,289	493,175	19.7%
Palm Bay-Melbourne-Titusville (<i>Brevard</i>)	552,427	543,376	476,230	14.1%
Pensacola-Ferry Pass-Brent (<i>Escambia, Santa Rosa</i>)	463,692	448,991	412,153	8.9%
Port St. Lucie (<i>Martin, St. Lucie</i>)	431,406	424,107	319,426	32.8%
Tallahassee (<i>Gadsden, Jefferson, Leon, Wakulla</i>)	375,270	367,413	320,304	14.7%
Ocala (<i>Marion</i>)	337,455	331,298	258,916	28.0%
Naples-Immokalee-Marco Island (<i>Collier</i>)	336,783	321,520	251,377	27.9%
Gainesville (<i>Alachua, Gilchrist</i>)	267,583	264,275	232,392	13.7%
Crestview-Fort Walton Beach-Destin (<i>Okaloosa, Walton</i>)	250,459	235,865	211,099	11.7%
Panama City (<i>Bay</i>)	187,324	184,715	162,777	13.5%
Punta Gorda (<i>Charlotte</i>)	164,467	159,978	141,627	13.0%
Homosassa Springs (<i>Citrus</i>)	140,798	141,236	118,085	19.6%
Sebastian-Vero Beach (<i>Indian River</i>)	140,955	138,028	112,947	22.2%
The Villages (<i>Sumter</i>)	111,125	93,420	53,345	75.1%
Sebring (<i>Highlands</i>)	99,818	98,786	87,366	13.1%

Sources: Executive Office of the President, U.S. Office of Management and Budget MSA definitions (OMB Bulletin No. 13.01); U.S. Department of Commerce, Bureau of the Census; University of Florida, Bureau of Economic and Business Research, Florida Estimates of Population, 2014

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 2014)

	Estimate April 1, 2014		Census April 1, 2010		Census April 1, 2000	
	Households	Average Household Size	Households	Average Household Size	Households	Average Household Size
Leon County	113,372	2.35	110,945	2.35	96,521	2.34
Florida	7,669,541	2.49	7,420,802	2.48	6,338,075	2.46

Source: University of Florida, Bureau of Economic and Business Research, "Florida Population Studies, Bulletin 170", December 2014

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 has steadily increased in Leon County. In 2013, 44.2% of residents 25 years and over had obtained a Bachelor's degree or higher, up from 37.1% in 1990. In comparison, 26.4% of State of Florida residents and 29.8% of US residents 25 years and over had obtained a Bachelor's degree or higher.

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 (2013)

	Leon County		State of Florida		United States	
	Number	Percent	Number	Percent	Number	Percent
Less than 9th grade	3,215	2.0%	739,623	5.6%	12,272,805	5.9%
9th to 12th grade, no diploma	9,968	6.2%	1,109,845	8.3%	16,614,916	8.0%
H.S. graduate (inc. equivalency)	31,447	19.6%	3,964,227	29.8%	58,084,465	28.1%
Some college, no degree	30,968	19.3%	2,799,815	21.0%	43,896,733	21.2%
Associate's degree	13,917	8.7%	1,188,081	8.9%	16,135,795	7.8%
Bachelor's degree	40,605	25.3%	2,253,937	16.9%	37,286,246	18.0%
Graduate or professional degree	30,389	18.9%	1,261,975	9.5%	22,296,892	10.8%
Total	160,509		13,317,503		206,587,852	

Source: U.S. Department of Commerce, Bureau of the Census, American Community Survey, 2009-2013

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 both increased by approximately 5,000 between 2008 and 2014.

Figure 2-1
Labor Force (2008-2014)

	2008	2009	2010	2011	2012	2013	2014
Leon County	147,166	147,402	149,962	148,775	150,119	149,410	152,543
% Change From Previous	1.1%	0.2%	1.7%	-0.8%	0.9%	-0.5%	2.1%
City of Tallahassee	93,958	93,848	96,808	96,090	97,114	96,681	98,771
% Change From Previous	1.7%	-0.1%	3.2%	-0.7%	1.1%	-0.4%	2.2%
Unincorporated Leon County	53,208	53,554	53,154	52,685	53,005	52,729	53,772
% Change From Previous	0.2%	0.7%	-0.7%	-0.9%	0.6%	-0.5%	2.0%

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 (2008-2014)

	2008	2009	2010	2011	2012	2013	2014
Leon County	140,547	137,146	138,026	136,742	139,449	140,420	144,263
% Change From Previous	-0.4%	-2.4%	0.6%	-0.9%	2.0%	0.7%	2.7%
City of Tallahassee	89,657	87,264	89,075	88,223	90,413	90,693	93,174
% Change From Previous	0.1%	-2.7%	2.1%	-1.0%	2.5%	0.3%	2.7%
Unincorporated Leon County	50,890	49,882	48,951	48,519	49,036	49,727	51,089
% Change From Previous	-1.4%	-2.0%	-1.9%	-0.9%	1.1%	1.4%	2.7%

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

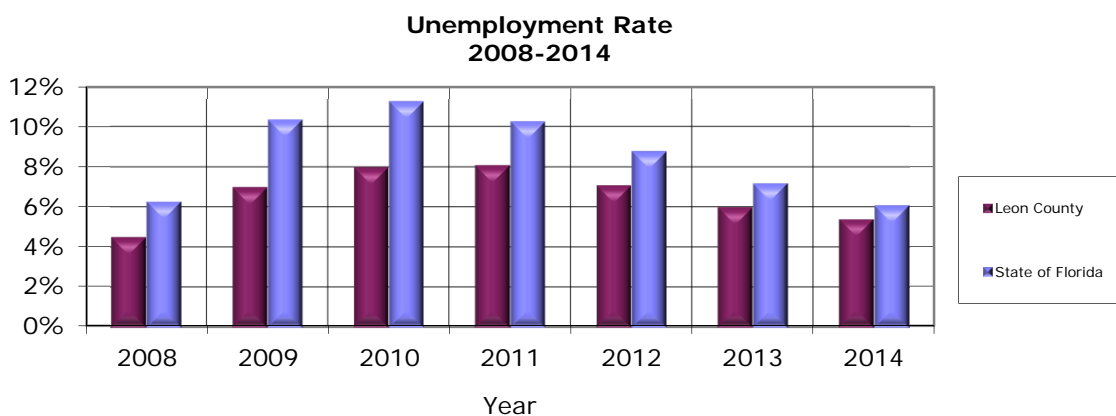
The unemployment rate in Leon County decreased to 5.4% in 2014, still considerably lower than the state average of 6.1%. Initial claims for unemployment compensation decreased 11.3% in 2013 in Leon County and 14.1% for the State.

**Figure 2-3
Unemployment Rate (2008-2014)**

	2008	2009	2010	2011	2012	2013	2014
Leon County	4.5%	7.0%	8.0%	8.1%	7.1%	6.0%	5.4%
City of Tallahassee	4.6%	7.0%	8.0%	8.2%	7.3%	6.2%	5.7%
Unincorporated Leon County	4.4%	6.9%	7.9%	7.9%	6.8%	5.7%	5.0%
State of Florida	6.3%	10.4%	11.3%	10.3%	8.8%	7.2%	6.1%

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 (2008-2014)**

	2008	2009	2010	2011	2012	2013	2014
Leon County	9,168	12,313	11,874	10,570	8,908	7,901	n/a
% Change from Previous	54.8%	34.3%	-3.6%	-11.0%	-15.7%	-11.3%	n/a
Florida	1,022,216	1,397,484	1,236,598	983,692	833,017	715,502	n/a
% Change from Previous	60.1%	36.7%	-11.5%	-20.5%	-15.3%	-14.1%	n/a

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

2.3 Employment by Industry

Between 2009 and 2014, non-agricultural employment in Leon County decreased on average 0.8% per year. Education & Health Services and Leisure & Hospitality exhibited the strongest growth (up 1.2% per year). Federal Government exhibited minimal annual average gains while all other major industries experienced declining average annual employment during the period.

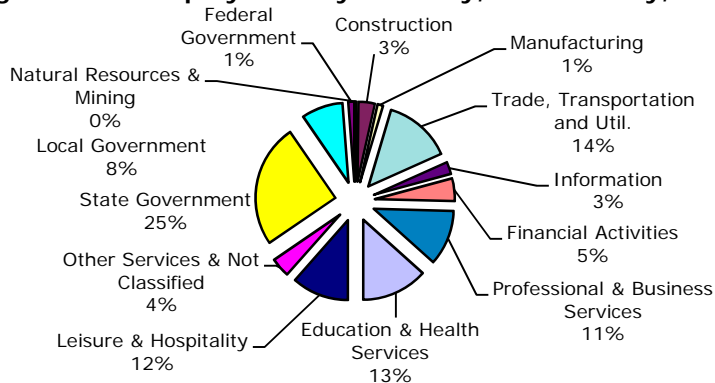
**Figure 2-5
Non-Agricultural Employment by Industry, Leon County (2009-2014)**

	2009	2010	2011	2012	2013	2014	Avg. Annual Change
Natural Resources & Mining	151	174	153	221	225	287	3.0%
Construction	5,339	4,794	4,541	4,344	4,654	4,678	-7.6%
Manufacturing	1,964	1,934	1,695	1,660	1,538	1,562	-8.0%
Trade, Transportation and Util.	18,506	18,271	18,388	18,275	18,667	19,322	-1.2%
Information	3,098	2,793	2,863	2,929	3,036	3,502	-4.2%
Financial Activities	6,639	6,393	6,486	6,418	6,541	6,504	-1.7%
Professional & Business Services	16,085	15,822	15,950	15,542	15,602	15,864	-1.5%
Education & Health Services	17,569	17,857	18,236	18,215	18,003	18,860	1.2%
Leisure & Hospitality	14,622	14,468	14,756	15,259	15,676	16,296	1.2%
Other Services & Not Classified	5,807	5,770	5,657	5,974	5,468	5,558	-2.6%
State Government	35,148	35,772	35,075	34,523	34,733	35,210	-0.3%
Local Government	12,124	11,997	12,212	12,203	11,982	11,808	-0.3%
Federal Government	1,732	1,823	1,692	1,679	1,721	1,720	0.0%
Total	138,784	137,868	137,713	137,250	137,846	141,217	-0.8%

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 (2014)**

Non-Agricultural Employment by Industry, Leon County, 2014



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, Education and Health Services and Professional and Business 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 2014 and 2022.

Figure 2-7
Projected Employment by Industry, Leon County (2014-2022)

Industry	2014 Employment	2022 Employment	Total Employment Change	Percentage Change
Total All Industries	160,512	173,536	13,024	8.1%
Construction	4,924	5,968	1,044	21.2%
Education and Health Services	18,467	21,926	3,459	18.7%
Professional and Business Services	17,233	19,689	2,456	14.3%
Financial Activities	6,986	7,775	789	11.3%
Leisure and Hospitality	16,406	18,180	1,774	10.8%
Other Services (Except Government)	7,100	7,758	658	9.3%
Local Government	11,879	12,602	723	6.1%
Retail Trade	15,560	16,382	822	5.3%
Wholesale Trade	2,537	2,670	133	5.2%
Self-Employed & Unpaid Family Workers	12,416	12,884	468	3.8%
Transportation and Warehousing	1,084	1,125	41	3.8%
State Government	39,237	40,162	925	2.4%
Manufacturing	1,487	1,517	30	2.0%
Information	3,134	3,057	-77	-2.5%
Agriculture, Forestry, Fishing and Hunting	224	217	-7	-3.1%
Federal Government	1,745	1,531	-214	-12.3%

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

2.5 Projected Employment by Occupation

The top occupation by projected annual percentage growth in Leon County is Veterinary Technologists and Technicians. By total employment change, service occupations (Retail Salespersons and Food Prep. and Serving Workers) account for two of the top three occupations projected to add the most jobs by 2021.

Figure 2-8
Fastest Growing Occupations, Leon County (2014-2022)

Industry	2014 Emp.	2022 Emp.	Total Emp. Change	Percent Growth
Home Health Aides	728	980	252	34.6%
Personal and Home Care Aides	317	424	107	33.8%
Heating A/C, Refrigeration Mechanics & Installers	527	686	159	30.2%
Brickmasons and Blockmasons	133	171	38	28.6%
Veterinary Technologists and Technicians	193	247	54	28.0%
Market Research Analysts and Marketing Specialists	277	352	75	27.1%
Medical Secretaries	215	273	58	27.0%
Cost Estimators	148	187	39	26.4%
Radiologic Technologists	203	255	52	25.6%
Dental Hygienists	182	223	41	22.5%

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

Figure 2-9
Occupations Gaining the Most New Jobs, Leon County (2014-2022)

Industry	2014 Emp.	2022 Emp.	Total Emp. Change	Percent Growth
Registered Nurses	2,654	3,160	506	19.1%
Food Prep. & Serving Workers, Inc. Fast Food	4,585	5,057	472	10.3%
Management Analysts	5,426	5,766	340	6.3%
Waiters and Waitresses	2,930	3,236	306	10.4%
Retail Salespersons	5,472	5,741	269	4.9%
Home Health Aides	728	980	252	34.6%
Receptionists and Information Clerks	1,388	1,621	233	16.8%
Cashiers	3,903	4,132	229	5.9%
Office Clerks, General	3,473	3,702	229	6.6%
Janitors and Cleaners, except Maids and Hskeeping.	2,938	3,165	227	7.7%

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

2.6 Median Family Income

The median family income in 2013 in Leon County was \$68,516 according to the Census Bureau's 2009-2013 5-Year American Community Survey.

Figure 2-10
Median Family Income 2013

	2013
Leon County	\$68,516
Tallahassee MSA*	\$62,846
City of Tallahassee	\$61,333
Florida	\$56,738

Source: U.S. Census Bureau, 2009-2013 5-Year American Community Survey

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

Figure 2-11
Median Family Income Estimates by Fiscal Year (2011-2015)

	2011	2012	2013	2014	2015
Tallahassee*	\$63,400	\$64,300	\$60,000	\$64,800	\$65,100
Florida	\$56,200	\$57,000	\$56,400	\$56,100	\$57,700

**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 2014 was \$41,111, 8.2% below the state average wage of \$44,803. The annual average state government wage was 2.4% higher in Leon County compared to the state average while the local government wage in Leon County was 11.6% lower than the state average.

Figure 2-12
Average Annual Employment and Wages by Ownership (2014)

	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
All Ownerships	8,390	141,217	\$41,111
Private Ownerships	8,132	92,479	\$38,175
Federal Government	48	1,720	\$70,027
State Government	186	35,210	\$47,365
Local Government	24	11,808	\$41,247
Florida			
All Ownerships	646,512	7,754,770	\$44,803
Private Ownerships	640,132	6,730,845	\$44,057
Federal Government	2,059	131,381	\$70,841
State Government	2,716	176,484	\$46,272
Local Government	1,605	716,060	\$46,677

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 (2014)

	Average Annual Reporting Units	Average Annual Employment	Average Annual Wage
Leon County			
Professional and Business Services	2,044	15,864	\$55,419
Financial Activities	886	6,504	\$52,687
Construction	687	4,678	\$39,687
Information	177	3,502	\$47,014
Manufacturing	124	1,562	\$49,391
Florida			
Professional and Business Services	144,643	1,165,228	\$54,245
Financial Activities	68,027	514,317	\$66,169
Construction	60,576	396,720	\$43,690
Information	10,622	136,691	\$70,634
Manufacturing	19,479	331,036	\$55,520

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

2.8 Occupational Employment and Wages

The 2015 estimated average hourly wage for all occupations in the Tallahassee MSA is \$20.42 with the average wage being \$25.80 per hour for experienced workers in their occupation.

Figure 2-14
Occupational Emp. and Wages, 1,000+ Employment,
Tallahassee MSA (2015)

Occupational Title	2014 Emp.	Hourly Wage (2015 Wage Estimates in dollars)			
		Mean	Median	Entry*	Exp.**
Total All Occupations	158,760	\$20.42	\$15.96	\$9.66	\$25.80
Retail Salespersons	6,150	\$11.49	\$9.63	\$9.04	\$12.73
Comb. Food Pre. & Serving Workers, Inc. Fast Food	5,150	\$9.05	\$8.94	\$8.78	\$9.20
Management Analysts	4,680	\$26.22	\$23.47	\$18.89	\$29.89
Cashiers	4,490	\$9.79	\$9.42	\$9.07	\$10.14
Secretaries, Except Legal, Medical, and Executive	4,200	\$14.75	\$13.93	\$10.68	\$16.77
Office Clerks, General	3,170	\$12.20	\$11.33	\$9.05	\$13.77
Waiters and Waitresses	3,110	\$10.77	\$9.32	\$8.83	\$11.74
Registered Nurses	3,010	\$28.07	\$27.79	\$22.02	\$31.09
Janitors and Cleaners, Ex.Maids and Hskping.	2,930	\$10.37	\$9.57	\$8.79	\$11.16
Customer Service Representatives	2,850	\$14.11	\$13.34	\$10.02	\$16.16
Accountants and Auditors	2,730	\$26.98	\$23.00	\$16.31	\$32.31
Business Operations Specialists, All Other	2,240	\$31.65	\$29.72	\$19.53	\$37.71
Executive Secretaries and Administrative Assistants	2,180	\$19.22	\$17.77	\$14.07	\$21.81
Lawyers	2,070	\$52.27	\$40.96	\$27.56	\$65.09
Stock Clerks and Order Fillers	1,880	\$11.07	\$10.36	\$8.75	\$12.24
First-Line Supervisors/Mgrs of Retail Sales Workers	1,580	\$21.40	\$18.90	\$12.91	\$25.63
General and Operations Managers	1,520	\$57.09	\$49.83	\$29.52	\$70.88
Bookkeeping, Accounting, and Auditing Clerks	1,490	\$16.37	\$15.75	\$11.52	\$18.79
Maintenance and Repair Workers, General	1,490	\$15.08	\$14.83	\$10.87	\$17.18
Comp. Ofcrs., Ex. Ag., Cons., Hlth., Safety & Trans.	1,450	\$18.90	\$16.88	\$13.88	\$21.40
Cooks, Restaurant	1,430	\$10.91	\$10.79	\$9.42	\$11.66
First-Line Supers./Mgrs. of Ofc. & Admin. Sup. Wkrs.	1,410	\$23.58	\$22.37	\$15.25	\$27.76
Receptionists and Information Clerks	1,320	\$11.97	\$11.34	\$9.10	\$13.41
Teacher Assistants	1,310	\$26,020	\$24,721	\$20,062	\$28,998
Sales Reps., Services, All Others	1,290	\$28.28	\$22.06	\$13.97	\$35.44
Nursing Assistants	1,250	\$11.22	\$10.96	\$9.69	\$11.98
Computer Network Architects	1,230	\$30.70	\$26.43	\$20.32	\$35.89
First Line Supervisors Food Prep. & Serving Workers	1,160	\$15.85	\$14.83	\$11.57	\$17.99
Elementary School Teachers, Except Spec. Education	1,150	\$43,246	\$43,029	\$31,777	\$48,980
Maids and Housekeeping Cleaners	1,120	\$9.38	\$9.11	\$8.80	\$9.68
Laborers and Freight, Stock & Material Movers, Hand	1,090	\$11.50	\$10.71	\$8.78	\$12.86
Police and Sheriff's Patrol Officers	1,020	\$23.87	\$22.11	\$16.43	\$27.59
Tax Examiners and Collectors, and Revenue Agents	1,000	\$19.27	\$16.34	\$13.69	\$22.05

* *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

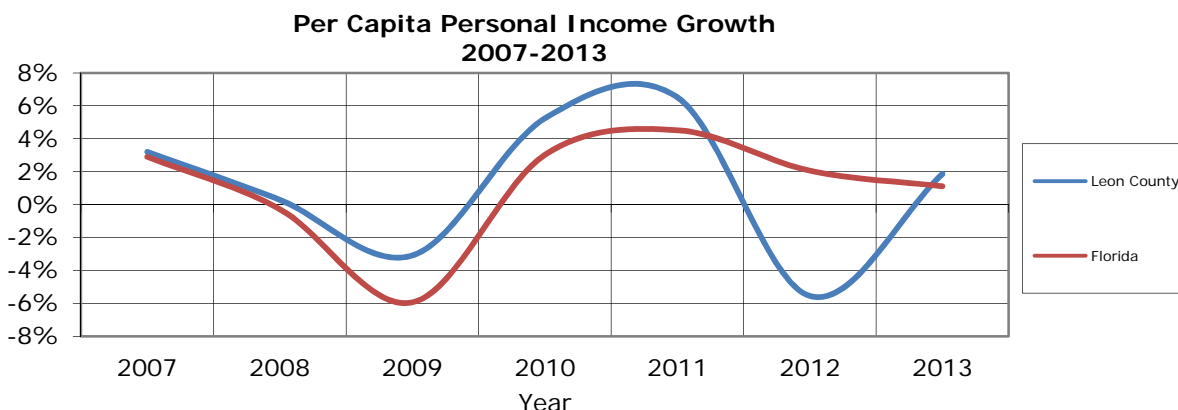
Per capita personal increased 1.9% in Leon County in 2013 and was 92.4% of the per capita income for the state. Since per capita personal income is calculated as the personal income of a given area divided by the resident population of the area, per capita personal income tends to be lower in Leon County due to the large number of college students residing in our community.

Figure 2-15
Per Capita Personal Income (2007-2013)

	2007	2008	2009	2010	2011	2012	2013
Leon County	\$36,589	\$36,695	\$35,560	\$37,420	\$39,857	\$37,644	\$38,345
% Change From Previous	3.2%	0.3%	-3.1%	5.2%	6.5%	-5.6%	1.9%
Florida	\$39,819	\$39,709	\$37,350	\$38,478	\$40,215	\$41,041	\$41,497
% Change From Previous	2.9%	-0.3%	-5.9%	3.0%	4.5%	2.1%	1.1%

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

Figure 2-16
Per Capita Personal Income Growth (2007-2013)



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 are derived from sales tax returns remitted to the state Department of Revenue each month. Taxable sales are those sales subject to Chapter 212, Florida Statutes. Generally speaking, the sales tax is levied on sales of goods, but not services, although there are some taxable services. The overall level of taxable sales increased 3.7% in the Tallahassee MSA in 2014. Taxable sales for the State of Florida were up 7.8% in 2014 compared with 2013. For the Tallahassee MSA, all six categories exhibited an increase in taxable sales between 2013 and 2014. Consumer Durables (up 6.5%), Autos & Accessories (up 6.0%), Business Investment (up 4.8%), Tourism & Recreation (up 3.5%), Building Investment (up 2.2%) and Consumer Nondurables (up 2.2%). It is estimated that taxable sales comprise 40-45% of all retail sales.

Figure 3-1
Annual Taxable Sales, Tallahassee MSA and Florida (2004-2014)

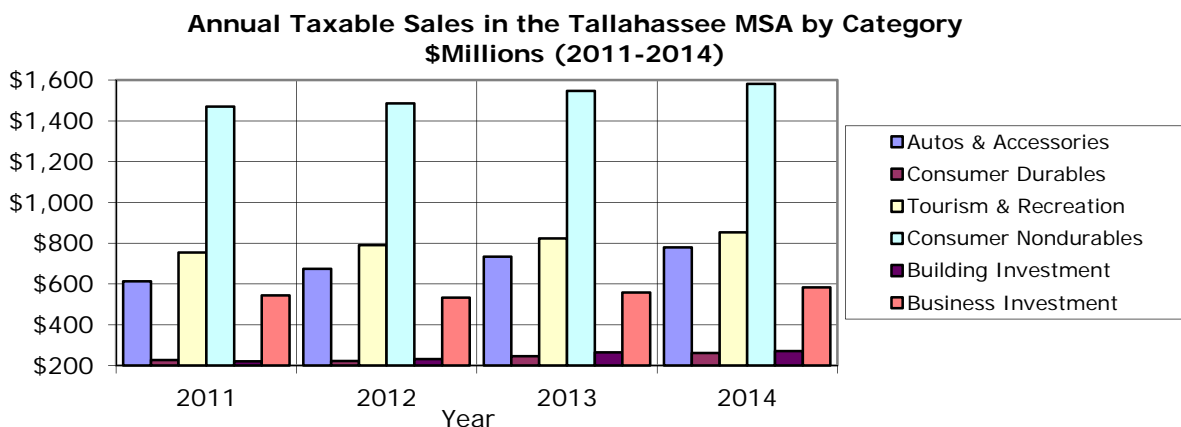
Year	Tallahassee MSA	Change from Previous Year	State of Florida	Change from Previous Year
2004	\$3,995.5	6.0%	\$294,110.3	10.4%
2005	\$4,307.8	7.8%	\$327,787.6	11.5%
2006	\$4,437.9	3.0%	\$343,300.1	4.7%
2007	\$4,395.5	-1.0%	\$329,168.7	-4.1%
2008	\$4,088.0	-7.0%	\$303,900.9	-7.7%
2009	\$3,795.2	-7.2%	\$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%
2013	\$4,174.5	5.9%	\$336,825.7	6.9%
2014	\$4,330.4	3.7%	\$363,097.2	7.8%

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 (2011-2014)



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

Source: Florida Department of Revenue

3.2 FDIC Summary of Deposits

Nearly \$5.1 billion in deposits were held in Leon County in FDIC-insured institutions as of June 30, 2014. Total Leon County deposits increased 6.0% between 2013 and 2014. 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

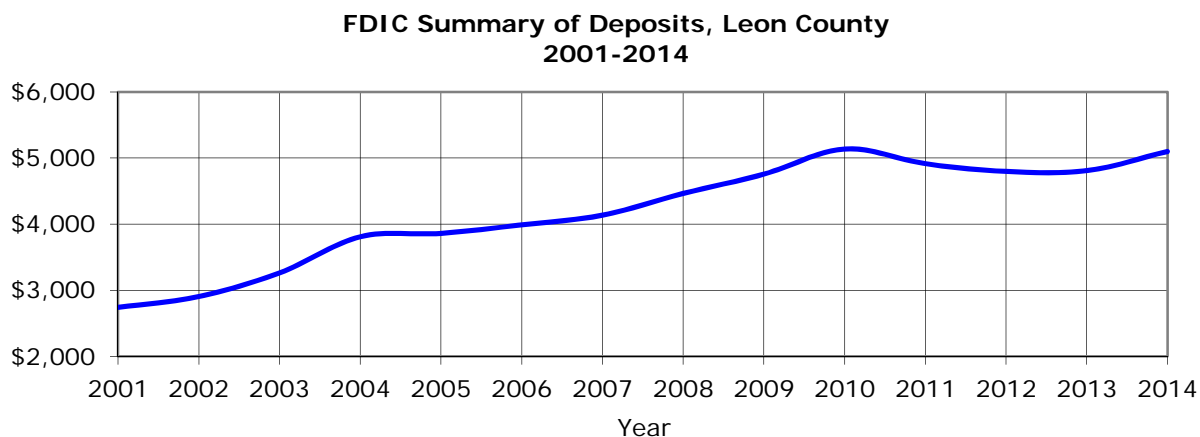
Figure 3-3
FDIC Summary of Deposits (2001-2014)

As of June 30	Leon County - All Institutions			Florida - All Institutions		
	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	5,616	\$411,157
2012	18	93	\$4,796	292	5,601	\$423,908
2013	17	82	\$4,809	281	5,548	\$441,108
2014	17	79	\$5,099	266	5,450	\$462,364

Note: Deposits in \$Millions of dollars

Source: FDIC, Summary of Deposits

Figure 3-4
FDIC Summary of Deposits, Leon County (2001-2014)



Note: Deposits in \$Millions of dollars

Source: FDIC, Summary of Deposits

3.3 Annual Visitor Trends

In calendar year 2014, just over 2.2 million people (person visits) visited Leon County, down 20.8% from calendar year 2013 levels. Visitor spending totaled \$572.6 million in 2014, 37.3% lower than total non-inflation adjusted visitor spending in 2013.

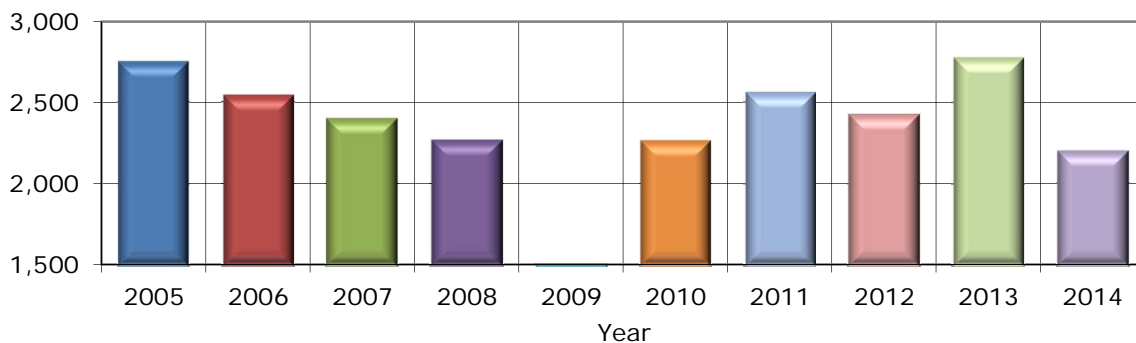
**Figure 3-5
Annual Visitor Trends-Person Visits (2005-2014)**

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Person Visits	2,751	2,545	2,402	2,270	n/a	2,266	2,564	2,430	2,778	2,200

Note: Data in Thousands

Source: Visit Tallahassee and Downs & St. Germain Research

**Annual Visitor Trends (Person Visits in Thousands)
2005-2014**



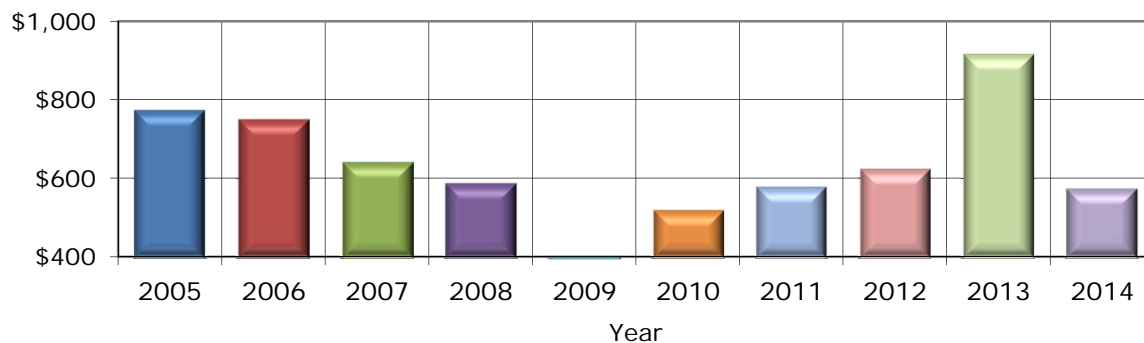
**Figure 3-6
Annual Visitor Trends-Annual Visitor Spending (2005-2014)**

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Visitor Spending	\$772	\$749	\$641	\$587	n/a	\$518	\$577	\$624	\$914	\$573

Note: Data in Millions

Source: Visit Tallahassee and Downs & St. Germain Research

**Annual Visitor Trends (Visitor Spending in Millions)
2005-2014**



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. It represents the costs of hiring comparable personnel across school districts. Extensive data on wages is used to estimate the relative cost of hiring comparable workers among Florida's 67 counties in a given year. The median Floridian, ranked by 2014 FPLI, lives in Hillsborough County with an index value of 100.89. In 2014, the ten counties with index values greater than 100.89 together account for 47.3% of the state's population. Note: 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 (2010-2014)

County	2010	2011	2012	2013	2014
Leon	94.39	94.08	93.87	96.75	95.50
Gadsden	94.05	93.74	92.94	94.19	92.98
Jefferson	92.50	91.38	91.15	93.94	92.73
Wakulla	91.96	92.94	94.74	95.27	93.04

Source: Florida Department of Education, Funding & Financial Reporting

3.5 Gross Domestic Product by Metro. Area

In 2013, the Tallahassee Metropolitan Area's (MSA) gross domestic product was \$13.8 billion, up \$0.4 billion from 2012. Real GDP in metropolitan areas increased 1.7% in 2013 after increasing 2.6% in 2012. Real GDP increased in 292 of the nation's 381 metropolitan areas in 2013 led by widespread growth in finance, insurance, real estate, rental, and leasing, nondurable-goods manufacturing, and professional and business services.

Figure 3-8

Gross Domestic Product by Metro. Area, US\$, Billions (2008-2013)

City	2008	2009	2010	2011	2012	2013	2013 MSA Ranking (out of 381 MSAs)
Tampa	112.3	109.8	110.1	111.8	117.7	122.5	27
Orlando	103.2	99.9	101.2	101.6	106.4	110.4	31
Jacksonville	58.7	56.4	57.4	57.7	60.1	62.1	49
Pensacola	13.8	13.7	14.2	14.5	14.9	15.2	142
Tallahassee	13.5	13.3	13.4	13.3	13.4	13.8	155
Gainesville	10.2	10.3	10.6	10.6	10.8	11.1	182
Panama City	7.0	7.0	7.1	7.0	7.1	7.4	227

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

3.6 Consumer Price Index (CPI-U)

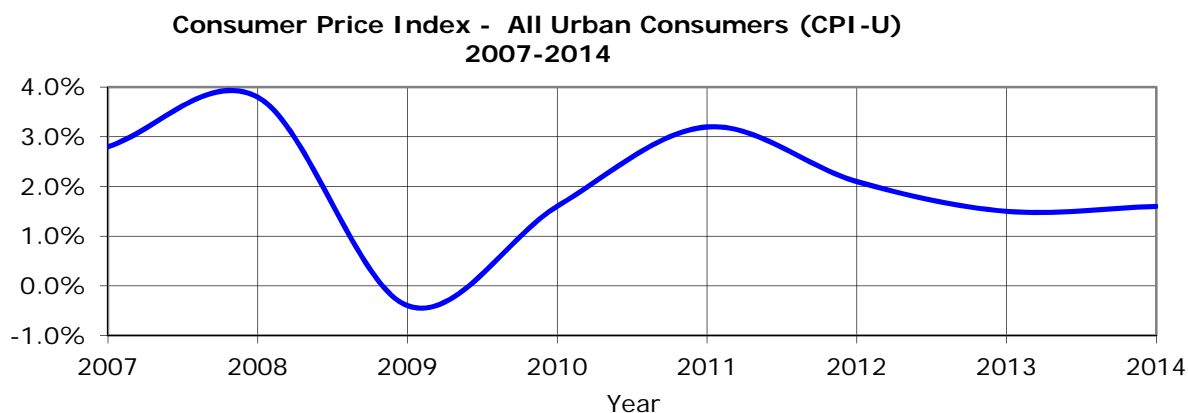
The Consumer Price Index for all Urban Consumers (Cost of Living Index) increased 1.6% in 2014 following a 1.5% increase in 2013.

Figure 3-9
Consumer Price Index for all Urban Consumers (CPI-U, 2007-2014)

	2007	2008	2009	2010	2011	2012	2013	2014
U.S. City Average	207.3	215.3	214.5	218.1	224.9	229.6	233.0	236.7
% Change from Previous	2.8%	3.8%	-0.4%	1.6%	3.2%	2.1%	1.5%	1.6%

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

Figure 3-10
Annual Change in the Consumer Price Index (CPI-U, 2007-2014)



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

3.7 Airport Traffic Statistics

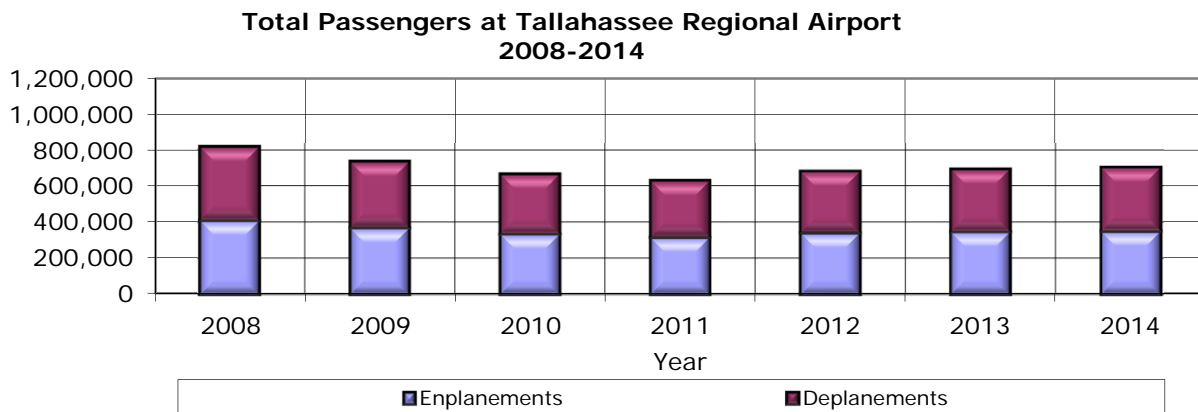
Passenger traffic at Tallahassee Regional Airport was up for the third straight year, up 3.6% per year on average since 2011.

**Figure 3-11
Tallahassee Regional Airport Traffic Statistics (2008-2014)**

	2008	2009	2010	2011	2012	2013	2014
Enplanements	411,532	371,106	336,598	318,172	344,078	348,185	352,821
Deplanements	409,411	366,579	334,099	315,619	340,533	348,539	353,107
Total Passengers	820,943	737,685	670,697	633,791	684,611	696,724	705,928

Source: City of Tallahassee, Aviation Department

**Figure 3-12
Total Passengers at Tallahassee Regional Airport (2008-2014)**



Source: City of Tallahassee, Aviation Department

Section 4

Education

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4.1 Higher Education Institutions Enrollment

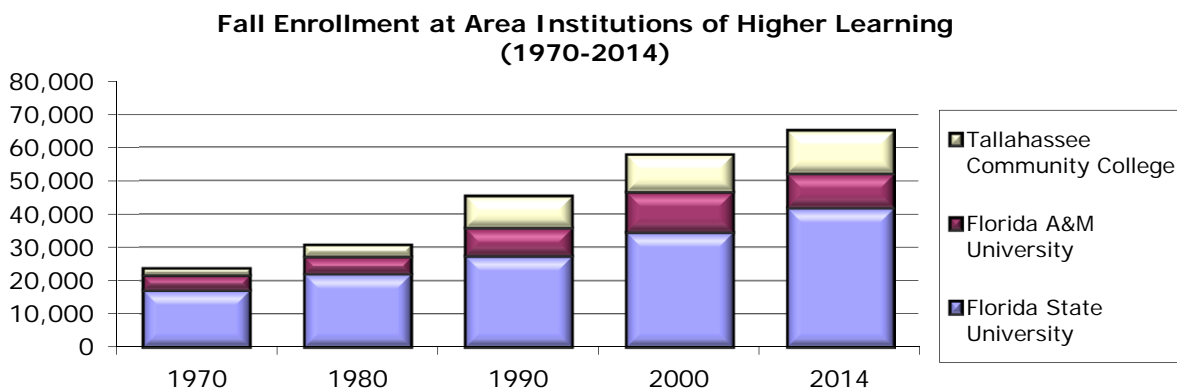
Fall 2014 enrollment figures at Florida A&M University and Tallahassee Community College trended downward compared with Fall 2013 totals.

Figure 4-1
Fall Enrollment at area Institutions of Higher Learning (1960-2014)

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
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	14,613	67,965
2013	41,477	10,734	13,634	65,845
2014	41,773	10,229	13,045	65,047

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 (1970-2014)



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) decreased marginally in the 2013-14 school year. The dropout rate for grades 9-12 decreased to 0.6% in the 2013-2014 school year.

Figure 4-3
Leon County Public School Enrollment, K-12 (1960-61-2013-14)

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
2013-14	32,182

Sources: Leon County Public Schools, Program Monitoring & Evaluation Services;
Florida Department of Education, Funding & Financial Reporting

Figure 4-4
Leon County Public School Dropout Statistics, Grades 9-12 (1996-97-2013-14)

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%
2012-13	0.7%
2013-14	0.6%

Source: Leon County Public Schools, Program Monitoring & Evaluation Services
Florida Department of Education, Funding & Financial Reporting

4.3 Leon County Public School Grades

Forty-three percent of Leon County Schools received an A or B grade in the 2013-14 school year.

Figure 4-5
Leon County Public School Grades, K-12 (2009-2014)

School Name	2014 Grade	2013 Grade	2012 Grade	2011 Grade	2010 Grade	2009 Grade
Amos P. Godby High School	C	C	B	C	B	F
Apalachee Elementary School	B	C	D	C	C	C
Astoria Park Elementary School	C	C	B	A	A	A
Augusta Raa Middle School	A	C	B	A	A	A
Belle Vue Middle School						C
Bond Elementary School	D	D	C	C	B	B
Buck Lake Elementary School	A	A	A	A	A	A
C.K. Steele-Leroy Collins Charter M.S.	D	F	D	C	C	B
Canopy Oaks Elementary School	C	B	A	A	A	A
Chaires Elementary School	A	B	A	A	A	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	B	A	A	A	A
Fairview Middle School	B	B	B	B	A	B
Fort Braden Elementary School	B	C	C	B	C	B
Frank Hartsfield Elementary School	D	C	B	C	C	B
Gilchrist Elementary School	A	A	A	A	A	A
Governors Charter Academy	C	C				
Griffin Middle School	C	D	C	C	C	C
Hawks Rise Elementary School	A	A	A	A	A	A
Imagine School at Evening Rose	D	C	C	C	A	F
J. Michael Conley Elementary School	C	B	A	A	B	A
James Rickards High School	C	C	C	B	A	D
John G. Riley Elementary School	D	C	C	B	C	A
Kate Sullivan Elementary School	B	B	A	B	B	B
Killlearn Lakes Elementary School	A	A	A	A	A	A
Lawton Chiles High School	A	A	A	A	A	B
Leon High School	B	B	A	B	B	C
Lillian Ruediger Elementary School	C	C	B	C	C	A
Lincoln High School	A	B	A	B	A	B
Oak Ridge Elementary School	C	D	C	B	C	A
Pineview Elementary School	C	C	B	C	A	B
R. Frank Nims Middle School	C	D	D	C	F	D
Roberts Elementary School	A	A	A	B	A	A
Sabal Palm Elementary School	D	C	C	B	B	B
Sail	A	A	A	A	B	B
Sealey Elementary School	C	B	A	B	B	A
Springwood Elementary School	B	C	C	B	C	A
Stars Middle School	C	C	B	A	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	B	A	B	A	A
William J. Montford III Middle School	A	A	A	A	A	A
Woodville Elementary School	C	C	B	A	B	B

Source: Florida Department of Education, Testing, Research & Evaluation

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	21.2
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

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5.1 History of Tallahassee/Leon County

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

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

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

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

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

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

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

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

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

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

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

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

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

1783 Spain regains possession of Florida.

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

1819 Florida is ceded by Spain to the United States.

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

5.1 History of Tallahassee/Leon County

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

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

1845 Florida becomes the 27th State.

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

1861 Florida secedes from the Union.

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

1887 The Florida Agricultural and Mechanical University is established.

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

1931 The Lively Vocational Technical School is established.

1966 The Tallahassee Community College is established.

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

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

5.2 Tallahassee's History of Annexations

The City of Tallahassee has had a long history of annexation activity as a means of achieving growth. During its first 150 years, Tallahassee expanded from one-quarter of a mile in size to 28.18 square miles by 1980. 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 103.31 square miles as of January 1, 2015. 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 (1927-2014)

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
2013	103.25	0.00	103.25
2014	103.31	0.06	103.31

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) (1981-2010)	Avg. Low Temperature (Fahrenheit) (1981-2010)	Avg. Days Above 90 degrees (Fahrenheit) (1962-2012)	Avg. Days Below 32 degrees (Fahrenheit) (1962-2012)	Avg. Number of Days With Rain (1962- 2012)	Avg. Rainfall (Inches) (1981- 2010)
January	64	39	0	10	9	4.3
February	68	42	0	7	8	4.9
March	74	47	0	2	8	5.9
April	80	52	1	3	6	3.1
May	87	62	9	0	7	3.5
June	91	70	19	0	12	7.7
July	92	72	23	0	16	7.2
August	92	72	22	0	14	7.4
September	89	68	15	0	8	4.7
October	81	57	2	0	5	3.2
November	73	48	0	3	6	3.5
December	65	41	0	9	8	3.9
Annual	79.5	55.8	91	34	107	59.2

Source: National Climatic Data Center, Comparative Climatic Data, For the United States Through 2012

5.4 Public Safety

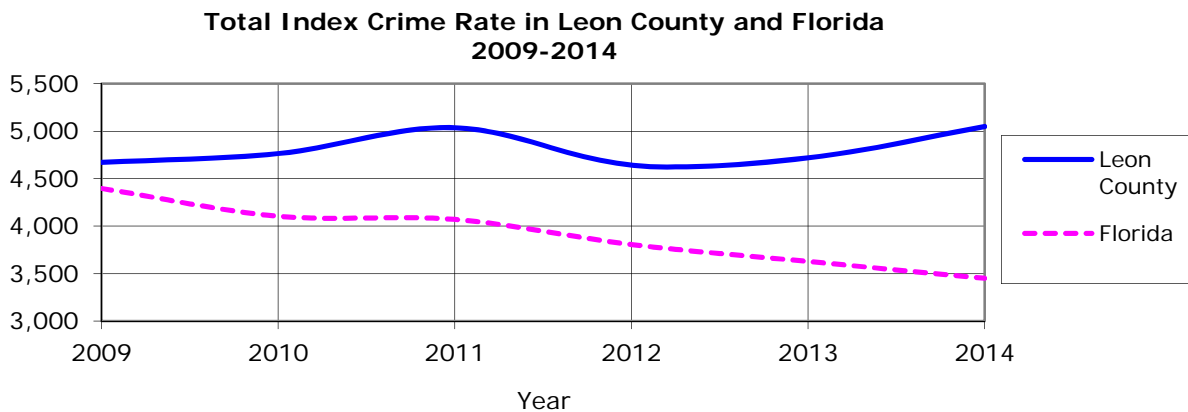
Between 2013 and 2014, Leon County experienced a 7.0% increase in the total crime index rate (rate per 100,000 population) compared to a 4.9% decrease for the State of Florida. The index rate for violent crimes in Leon County increased 15.2% in 2014 over 2013 levels. The index rate for Property Crimes in Leon County increased 5.6% in 2014 over 2013 levels with the rate of burglaries up 5.8% during the period and a 47.7% increase in the rate of motor vehicle thefts.

Figure 5-3
Leon County Crime Rates, Rate per 100,000 Residents (2009-2014)

Type of Crime	2009	2010	2011	2012	2013	2014	Percent Change (2013-2014)
Violent Crimes	742.0	762.6	735.1	674.2	658.5	758.6	15.2%
Murder	3.6	5.5	5.1	6.1	5.0	6.0	20.0%
Forcible Sex Offenses	52.8	86.6	77.8	69.9	98.4	116.6	18.5%
Robbery	196.9	196.1	208.1	207.4	154.1	118.4	-23.2%
Aggravated Assault	488.7	474.4	444.1	390.8	400.9	517.6	29.1%
Property Crime	3,929.0	4,002.1	4,301.8	3,969.1	4,061.8	4,290.9	5.6%
Burglary	1,459.2	1,279.6	1,470.3	1,216.6	997.9	1,055.8	5.8%
Larceny	2,310.4	2,553.7	2,654.9	2,521.7	2,866.6	2,943.9	2.7%
Motor Vehicle Theft	159.4	168.8	176.6	230.8	197.2	291.2	47.7%
Index Rate (per 100,000)	4,671.0	4,764.7	5,037.0	4,643.3	4,720.2	5,049.6	7.0%

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

Figure 5-4
Total Index Crime Rate in Leon County and Florida (2009-2014)



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 (2014)

Taxing Authority	Millage Rate	Where Tax is Applied
Leon County Commission		
General Property Tax	8.3144	Anywhere in Leon County
County EMS MSTU	0.5000	Anywhere in Leon County
Leon County School Board		
State Law	5.1360	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	0.0390	Anywhere in Leon County
Inside City Limits Total	19.9374	
Outside City Limits Total	16.2374	
Downtown Improvement Area	20.9374	

Source: Leon County Property Appraiser

Section 6

Residential and Commercial Development

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6.1 Residential Development

The overall level of residential building permits for new construction issued in Leon County has remained steady over the last three years. There were 482 permits issued for new single-family (detached and attached) homes in 2014, the highest level since 2008, but still well below the historical annual average of 1,265 new single-family construction permits issued per year since 1970 (earliest Planning Department records available). Multi-family new construction permits continued strong in 2014 with three larger apartment communities permitted (The Woodlands on West Tennessee St., The Onyx and U Club on Woodward Phase II).

Figure 6-1
Residential Building Permits Issued (New Construction) By Type
in Leon County (1985-2014)

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
2013	398	64	720	1,182	54	1,236
2014	443	39	698	1,180	50	1,230

*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 127,074 residential housing units in Leon County as of 2014, 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
2014(e)	86,242	40,832	127,074
2020(p)	92,153	41,563	133,716
2030(p)	102,034	43,263	145,297
2040(p)	110,767	44,793	155,560

Sources: U.S. Department of Commerce, Bureau of the Census (1970-2010), Tallahassee-Leon County Planning Department Estimates and Projections (2014-2040)

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

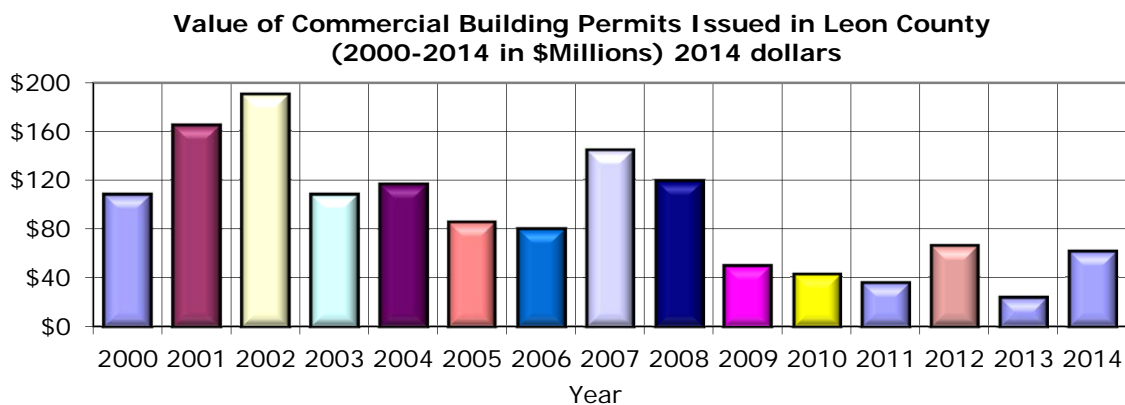
The value of commercial permits issued for new construction in 2014 was up in comparison with recent historical averages. Note: For the purposes of this comparison, the valuation of permits to construct new public facilities are not included in these totals.

Figure 6-4
Commercial Building Permits Issued (New Construction) in Leon County (2000-2014)

Year	Number of Permits	Value of Permits (\$Millions)	Permit Value in 2014 Dollars (\$Millions)
2000	119	\$78.7	\$108.2
2001	140	\$123.5	\$165.1
2002	129	\$144.3	\$189.9
2003	104	\$84.1	\$108.2
2004	106	\$93.4	\$117.0
2005	98	\$70.5	\$85.4
2006	109	\$68.0	\$79.8
2007	83	\$126.4	\$144.3
2008	88	\$108.5	\$119.3
2009	48	\$45.2	\$49.9
2010	30	\$39.0	\$42.3
2011	26	\$34.7	\$35.5
2012	54	\$63.7	\$65.7
2013	25	\$23.1	\$23.5
2014	39	\$60.9	\$60.9

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 (2000-2014)



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

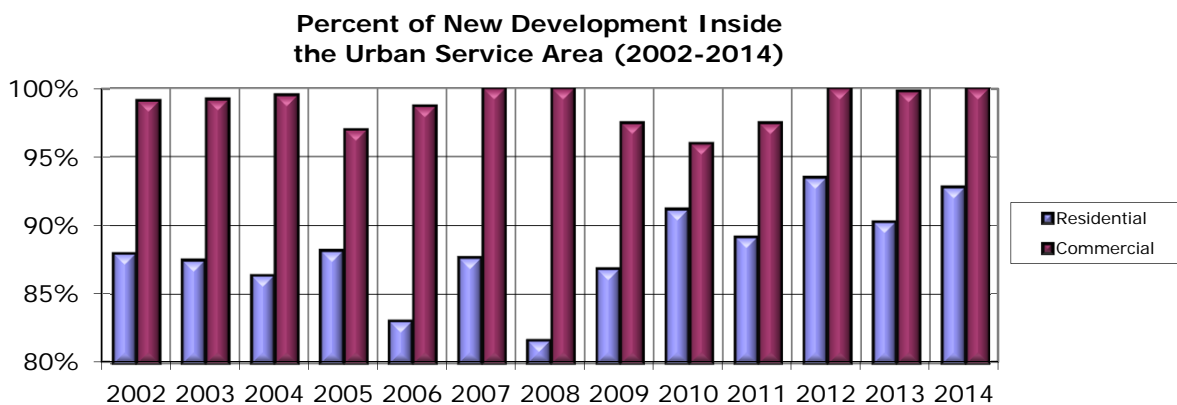
The principal growth management strategy of the Tallahassee-Leon County Comprehensive Plan is the Urban Service Area (USA). The location and size of the USA is based upon the area necessary to accommodate 90% of new residential dwelling units within the County by the Plan Horizon. The percentage of new residential development constructed within the approximate 161 square mile USA in 2014 was 92.8%.

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%
2013	90.3%	99.8%
2014	92.8%	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 (2002-2014)



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 to 21.2% for year-end 2014, up from 19.9% in year-end 2013.

Figure 6-8
Office Market Survey (Year-End 2014)

Market	Number of Properties	Square Feet Surveyed	Square Feet Vacant	Percent Vacant	Asking Rents*
Downtown	23	1,010,683	181,734	18.0%	\$16.00-\$29.00**
Northeast	75	1,976,166	312,104	15.8%	\$10.00-\$26.00
Northwest/West	22	1,251,748	315,804	25.2%	\$7.00-\$17.95
Southeast	32	2,810,255	729,008	25.9%	\$8.00-\$19.19
Total	152	7,048,852	1,538,650	21.2%	\$7.00-\$29.00

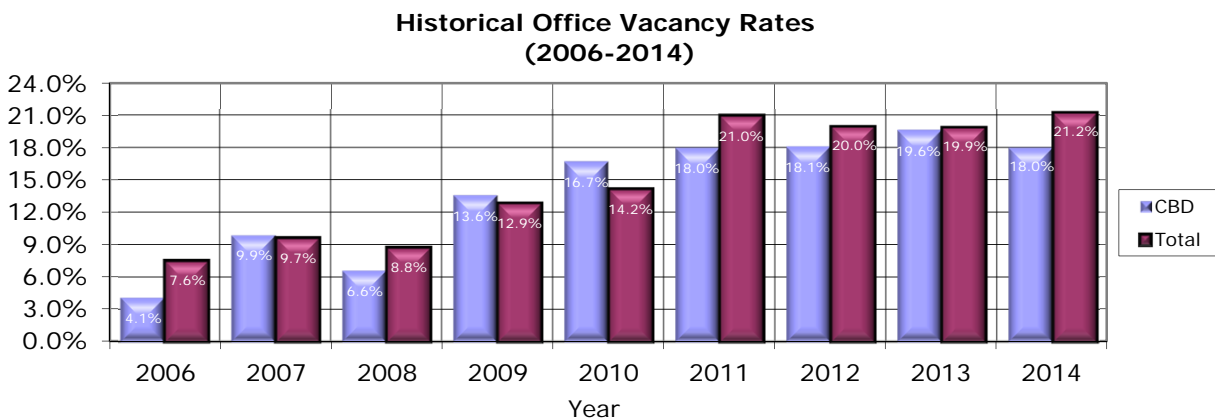
*All rents adjusted to full service (operating expenses include utilities and janitorial)

**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 (2006-2014)



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

Note: Data for years 2004-2009 represent first quarter data, 2010-2014 represent end-of-year data.

6.6 Apartment Market Summary

The apartment vacancy rate in Tallahassee decreased from 8.5% in September 2013 to 7.3% in September 2014. The average monthly rent is over \$1,050 with the average one bedroom renting for just over \$700 per month and the average four bedroom renting for just over \$1,900 per month.

Figure 6-10
Apartment Market Survey (2007-2014)

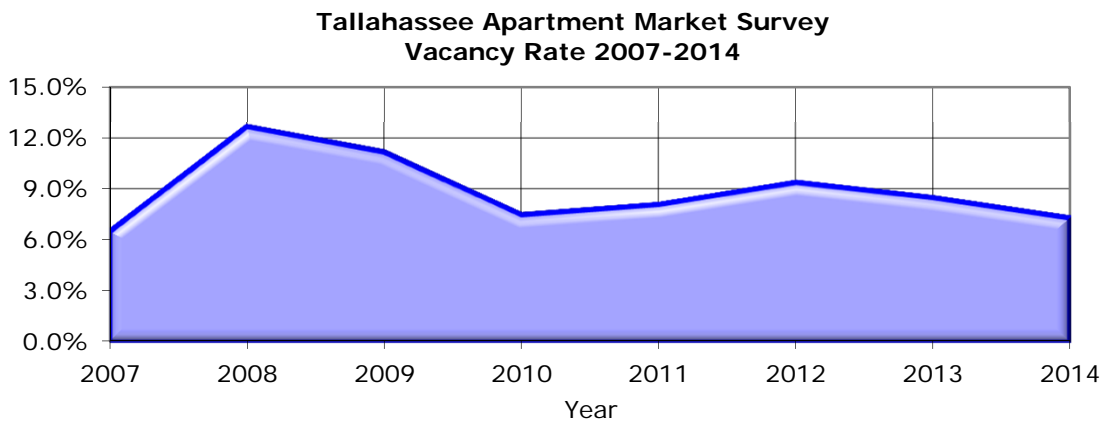
	Sept. 2007	Sept. 2008	Sept. 2009	Sept. 2010	Sept. 2011	Sept. 2012	Sept. 2013	Sept. 2014
Total Units Surveyed	17,722	18,348	19,307	18,829	19,419	20,217	21,487	21,770
Vacant Units	1,149	2,328	2,163	1,407	1,573	1,902	1,819	1,586
Vacancy Rate	6.5%	12.7%	11.2%	7.5%	8.1%	9.4%	8.5%	7.3%
Average Sq. Ft.	950-	1,000-	1,000-	1,000-	1,000-	1,000-	1,000-	1,000-
Range	1,000	1,050	1,050	1,050	1,050	1,050	1,050	1,050
Average Rent per	\$850-	\$900-	\$900-	\$900-	\$950-	\$950-	\$950-	\$1,050-
Month Range	\$900	\$950	\$950	\$950	\$1,000	\$1,000	\$1,000	\$1,100

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, 2014 Tallahassee Apartment Index, www.apindex.com, October 2014

Figure 6-11
Apartment Market Vacancy Rate (2007-2014)



Source: Real Data, 2014 Tallahassee Apartment Index, www.apindex.com, October 2014

6.7 Median Residential Sale Prices

The median sales price of a detached single-family home in Leon County increased 0.5% per quarter on average between first quarter 2010 and fourth quarter 2014. Over the past twelve years, (first quarter 2001 to first quarter 2014) the median sales price increased on average 0.6% per quarter.

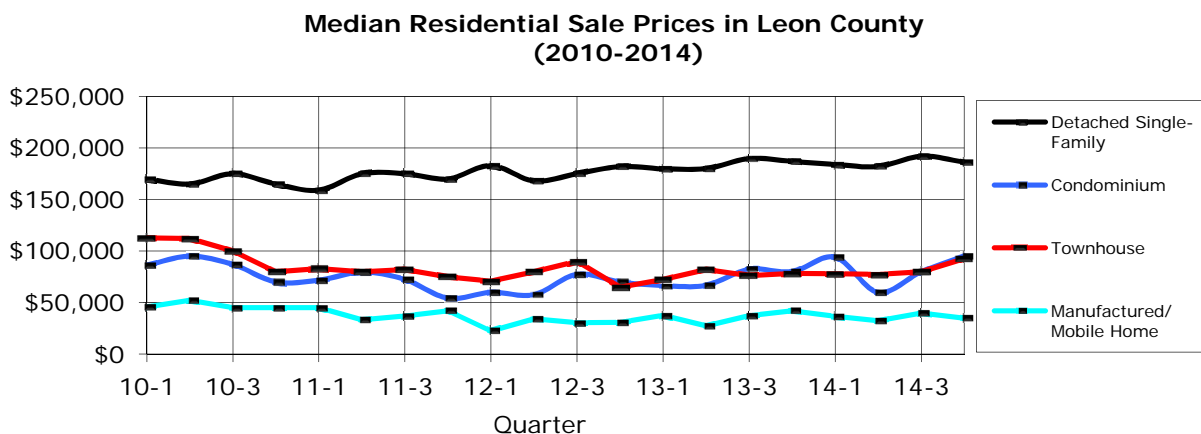
Figure 6-12
Median Residential Sale Prices in Leon County (2010-2014)

Quarter	Detached Single-Family	Condominium	Townhouse	Manufactured/ Mobile Home
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
2013-1	\$179,750	\$66,500	\$72,500	\$37,600
2013-2	\$180,000	\$66,816	\$82,000	\$27,375
2013-3	\$189,700	\$82,250	\$76,000	\$37,400
2013-4	\$187,000	\$80,000	\$78,300	\$42,000
2014-1	\$184,000	\$94,000	\$78,000	\$36,750
2014-2	\$182,000	\$59,835	\$77,300	\$32,500
2014-3	\$192,000	\$79,900	\$80,000	\$39,900
2014-4	\$186,250	\$95,000	\$92,700	\$35,000

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 (2010-2014)



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

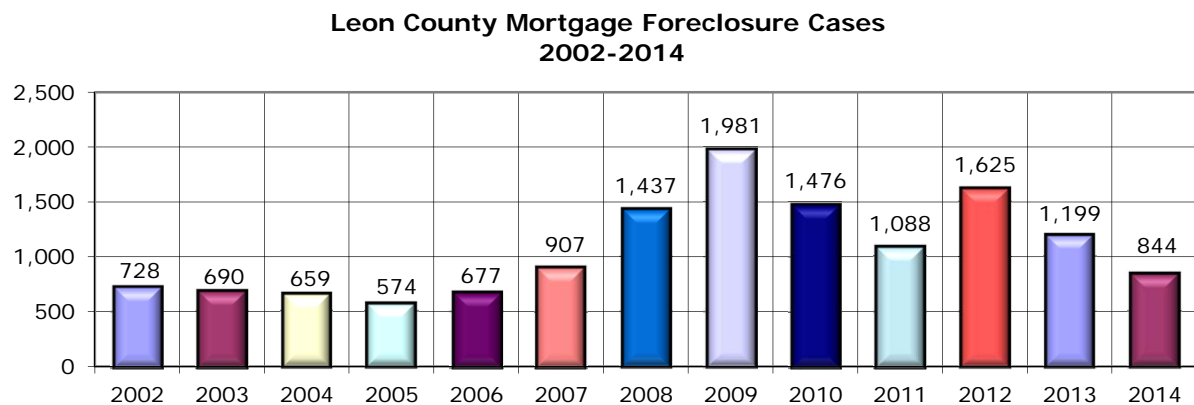
Mortgage foreclosure cases decreased 29.6% in 2014 when compared to 2013. There were 844 mortgage foreclosure cases in Leon County in 2014 according to the Leon County Clerk of Courts.

Figure 6-14
Leon County Mortgage Foreclosure Cases (2002-2014)

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%
2013	1,199	-26.2%
2014	844	-29.6%

Source: Leon County Clerk of Courts

Figure 6-15
Leon County Mortgage Foreclosure Cases (2002-2014)



Source: Leon County Clerk of Courts