



The Tallahassee Economic, Quality of Life and Investment Climate

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Executive Summary

The following report on “The Tallahassee Economic, Quality of Life and Investment Climate” provides valuable insight into economic development in the Tallahassee/ Leon County area. The sections highlighted include: (1) quality of life (QOL), (2) new economy, (3) investment incentives, (4) GIS mapping and (5) economic impact analysis.

Tallahassee has a competitive environment for investment and has several strengths in the areas of QOL, new economy, transportation facilities, and many other aspects. With the efforts exerted on all levels to strengthen the competitive economic position of Tallahassee, there is a reason to expect that the trend will be positive in the future. Tallahassee is becoming one of the fastest growing manufacturing and high- tech economies in Florida. (Economic Yearbook 2007 BIG BEND: Rounding out the Economy: The Big Bend region is growing its manufacturing and tourism base, Charlotte Crane) Tallahassee was one of the fastest-growing U.S. cities in the late 20th century according to Columbia Encyclopedia. According to the AeAnet.org website, Florida ranks 4th in total employment in high-tech industries (AeA Cyberstates, 2006).

Tallahassee has much to offer in terms of quality of life (QOL). It has favorable living and working conditions, a high level of educational attainment, a moderate cost of housing, and a substantial transportation network with an airport that is close to both the major highways. The health network QOL is also significant. Although direct investment incentives offered to investors are critical in determining an investor’s decision-making process with respect to expansion or relocation decisions, the QOL index represents an indirect business incentive.

The new economy trend is a concept used in previous national and local studies. In a Taltech study conducted by FSU CEFA in the year 2003, Tallahassee received a score of 47.7 and ranked 11th on the national level among the 66 Metropolitan Statistical Areas. The five main categories of this score were knowledge, globalization, economic, dynamism and competition, transformation to a digital economy, and technological innovation. The study implemented a measure termed the Metropolitan “New Economy Index” (NEI) which used 16 indicators according to the FSU CEFA study, strengths (as evidenced by a high NEI) in Tallahassee included: (1) internet backbone, (2) managerial professional and technical jobs, (3) workforce education, (4) online education, (5) academic research and development funding.

The more commonly used direct investment incentives in the Tallahassee area are tax relief incentives. In addition, the City of Tallahassee’s Targeted Business Pilot Program (TBPP) offers other incentives that encourage investment in strategic locations in Tallahassee termed the “Enterprise Zone”, among other locations (e.g., Frenchtown, Gaines Street, Airport, etc.). To ascertain the effectiveness of the incentives, it is vital to consider the current investors’ opinions using surveys regarding the strengths and weaknesses in Tallahassee. FSU CEFA has been using the WITS database to provide demographic information in report and mapping formats. These maps are customized to Leon County, City of Tallahassee, Enterprise zone and other strategic locations (Figure 1).

1. Introduction

Tallahassee has been the capital of Florida since 1824. It is located in the heart of Leon County, (Figure 1), as a part of the Big Bend Region (Figure 2)¹ with a population of 150,627 in 2007 estimate² It has a total area of 98.2 square mile (sq.m).³ Tallahassee is also becoming one of the fastest growing manufacturing and high- tech economies in Florida.⁴

Figure 2: Tallahassee: In the Heart of Leon County

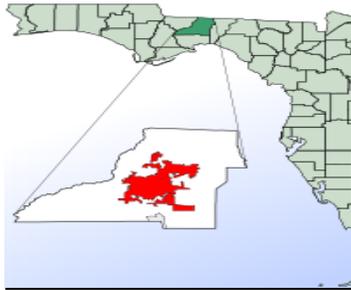


Figure 3: Tallahassee, the Big Bend, and Florida



Florida GDP ranked fourth among the US states, with a total of \$674.0 billion in the year 2005. In addition, the state is the third most populous in the US. The state has 14 deepwater seaports. According to Cyberstates, Florida's high-tech employment totaled 276,400 in the year 2005, up by 10,900, or by 4%. This makes Florida the 4th ranked Cyberstate by tech industry employment and the 2nd fastest growing Cyberstate in the year 2005. ⁵

Florida has many comparative attractive merits for businesses:⁶

- Florida is a national leader in international commerce, with \$95.3 billion in trade, proximity to Latin America and a multicultural population. High-tech exports from Florida reached \$11 billion in the year 2005, the third highest nationwide. Moreover, Florida is the ninth largest producer of exported goods. (WISER, 2003)

² Most of the demographic data will be taken from WITS: <http://wired.extendthereach.com>.

³ <http://www.census.gov/>.

⁴ http://www.answers.com/topic/tallahassee-florida#wp-_note-1.

⁵ http://www.aeanet.org/Publications/idjj_fcc2007_overview.asp .

⁶ The website www.businessflorida.com includes detailed information about Florida that is beneficial to businesses.

- In the year 2005, Florida's 3.8% unemployment rate was the second lowest among large US states. Florida added 259,800 new jobs from July 2005 to July 2006 and ranked first in the nation for job creation. Florida remains one of only 10 states with a right-to-work provision in its constitution. Florida's metro areas hold the top 3 spots and 12 of the top 30 on the Milken Institute's Best Performing Cities Index of where jobs created. Florida has the fourth largest labor force, and the seventh lowest unemployment rate. ([BLS, 2006](#))
- Florida has the fourth highest number of business establishments ([BLS, 2005](#))
- Florida ranks fourth in the nation for total high-tech employment with 265,484 high-tech workers. Florida added 6,700 high-tech jobs in the year 2004 to become the second fastest growing state in high-tech industry employment. According to the AeAnet.org website, Florida ranks fourth in total employment in high-tech industries. ([AeA Cyberstates, 2006](#))
- Florida has 354 financial institutions, including 56 international banks.
- Defense-related industries are a \$44 billion segment of the state's economy, representing 714,500 direct and indirect jobs.
- Every Floridian lives within 50 miles of an institution of post-secondary learning.
- Telecommunications: Eight Florida cities are on Intel Corporation's list of top 100 for greatest wireless accessibility.
- QOL: Florida has earned top rankings in Harris Poll's "most desirable places to live" since the survey's inception. "
- Florida has the eighth largest economy in the western hemisphere and the 19th largest economy in the world ([BEA, 2006](#)). It is the ninth largest recipient of Foreign Direct Investment. ([BEA, 2003](#))

1.A Leon County

- The percentage of students who obtained Bachelor's degree or higher was 41.7% of the total population in Leon County. Its rank was 48th on the US level (out of 3,141 counties).
- Leon County recorded a low level of unemployment rate of 2.7% in the year 2006.

- Leon County has average wage per job of \$34,541 (Table 1).
- The rate of growth for the period 1990-2005 was 27.6%, making Leon County among the top tier (upper fifth) of all US counties.
- Given the relatively low level of unemployment, high level of wages, and the relatively large labor force, Leon County ranked 227th (out of 3,141).

More demographics are included in Table 1.

Table 1: Leon County Demographics and Their Relative US Rank

	Value	Rank in U.S.	Industry Overview (2005)	Value	Rank in U.S.
Population (2006)	245,625	<u>250</u>	Covered Employment	145,159	<u>192</u>
Growth (%) since 1990	27.6%	<u>680</u>	Average wage per job	\$34,541	<u>490</u>
Households (2000)	96,521	<u>223</u>	Manufacturing - % all jobs in County	1.5%	<u>2710</u>
Labor Force (persons) (2006)	139,341	<u>227</u>	Average wage per job	\$39,284	<u>954</u>
Unemployment Rate (2006)	2.7	<u>2983</u>	Transportation & Warehousing - % all jobs in County	0.4%	<u>2964</u>
Per Capita Personal Income (2005)	\$32,188	<u>490</u>	Average wage per job	\$53,659	<u>50</u>
Median Household Income (2004)	\$39,562	<u>1118</u>	Health Care, Social Assist. - % all jobs in County	9.9%	<u>1190</u>
Poverty Rate (2004)	12.7	<u>1623</u>	Average wage per job	\$38,413	<u>323</u>
H.S. Diploma or More - % of Adults 25+ (2000)	89.1	<u>160</u>	Finance and Insurance - % all jobs in County	3.4%	<u>757</u>
Bachelor's Deg. or More - % of Adults 25+ (2000)	41.7	<u>48</u>	Average wage per job	\$51,484	<u>259</u>

Source: http://www.stats.indiana.edu/uspr/a/us_profile_frame.html

- According to Census 2000 (the latest available), the City of Tallahassee ranks 134th among all US cities with respect to population. The population per square mile was 1,574.
- Between 1990 and 2000, the land area of the city has grown by 51.2%. The population growth rate was moderate with an average of 2.07% in the years 1990-2000. ⁷
- Tallahassee ranks 115th in the overall growth among all US cities. Comparing to the neighboring cities in Florida and neighboring states, the City of Tallahassee ranked 18 out of 35 (Table 2).

Section 2 will discuss the QOL in Tallahassee. Section 3 will outline the new economy trend. Section 4 covers the investment incentives. GIS analysis results (using the WITS database) are depicted in Section 5. Section 6 highlights the economic impact analysis. Section 7 will describe the report's conclusions and recommendations. The Appendices Section includes detailed data (included a

⁷ Check the link <http://www.demographia.com/db-uscity98.htm> for more demographic rankings.

business listing in the enterprise zone, the schools types and rating and higher education in Tallahassee).

Table 2: The Fastest Growing Cities in Florida, Alabama and Georgia in the Year 2006

rank	city	state	change
1	Port St. Lucie	Florida	61.9
2	Miramar	Florida	48.7
3	Cape Coral	Florida	47.8
4	Atlanta	Georgia	16.8
5	Orlando	Florida	14.5
6	Miami	Florida	11.5
7	Athens-Clarke	Georgia	11.3
8	Chesapeake	Virginia	10.7
9	Tampa	Florida	9.7
10	Pembroke Pines	Florida	9.1
11	Coral Springs	Florida	9.1
12	Fort Lauderdale	Florida	8.9
13	Jacksonville	Florida	8
14	Alexandria	Virginia	6.8
15	Huntsville	Alabama	5.5
16	Arlington CDP	Virginia	5.5
17	Hollywood	Florida	4.6
18	Tallahassee	Florida	4.4
19	Pompano Beach	Florida	4.2
20	Virginia Beach	Virginia	2.4
21	Columbus	Georgia	1.3
22	Portsmouth	Virginia	0.8
23	Montgomery	Alabama	0.1
24	St. Petersburg	Florida	-0.1
25	Hampton	Virginia	-1
26	Newport News	Virginia	-1.3
27	Clearwater	Florida	-1.6
28	Norfolk	Virginia	-2.3
29	Gainesville	Florida	-2.5
30	Richmond	Virginia	-2.6
31	Augusta-Richmond	Georgia	-3
32	Mobile	Alabama	-3.2
33	Hialeah	Florida	-4.1
34	Savannah	Georgia	-4.2
35	Birmingham	Alabama	-5.4

Source: <http://www.citymayors.com/statistics/us-cities-growth-2007.html>

2. QOL

2.A QOL Defined

QOL was defined by Moriarty (1999) as an overall sense of well-being when applied to an individual" and a "supportive environment when applied to a community". While some dimensions of QOL can be quantified using indicators that research has shown to be related to determinants of health and community-well being, other valid dimensions of QOL include the perceptions of community residents about aspects of their neighborhoods and communities that either enhance or diminish their QOL. Most QOL studies focus on health and life expectancy. This does not imply that QOL is only a health-related measure. In fact, the concept of QOL has social, economic and cultural dimensions. These are probably more important to societies than health-related QOL measures simply because they include more comprehensive requirements for individuals' satisfaction. A primary research area in QOL literature concerns the measurement of QOL. For a long time, there has been consensus that material well-being is an accepted measure of QOL. The material well-being most commonly used measure is income per capita, presented as the average share in real GDP of the population. This definition has been subject to criticism because material well-being is not at all the sole determinant of QOL. It is not necessary that a higher personal income and no personal freedom are preferable to higher personal freedom and substantially lower income. Several components are integral to QOL. Some literature has tried to incorporate the other dimensions of QOL into material well-being. Nevertheless, it faced "insurmountable difficulties in assigning monetary values to the various factors and intangibles that comprise a wider measure of socio-economic well being." (EIU, 2005) Following, there will be a discussion of two common and varied methods of measuring the QOL: the EIU's QOL survey-based index and the non-indexed approach. The latter approach is called non-indexed because it includes many variables that cannot be abbreviated in one number. This is the traditional approach to measure the QOL. It has been widely used in literature.

2.B QOL Measures

The indexed measure has some limitations. First, it stems from regression results in which the likelihood of getting desired results is high due to the subjectivity of determinants selection. Multicollinearity, the existence of linear correlation among the explanatory variables, is another issue affecting the reliability of the multiple

regression results. Third, the selection of different years will probably lead to different results. These problems will not occur if the non-indexed measure is used.

The non-indexed measures have an advantage of providing a more detailed analysis. Nothing prevents one from using both measures and then making some comparisons between the two. For the purpose of this study, however, the detailed non-indexed measure is the recommended one due to its simplicity, popularity and practicality as compared to the indexed measure.

In measuring the QOL, the non-indexed measures are easily compared to US, Florida, Leon County and neighborhood cities.

Table 3: Non-Indexed Measures of the QOL

<ul style="list-style-type: none"> • DEMOGRAPHICS 1. Total population 2. Population by age group 3. Population by race 4. Income distribution 5. Public school enrollment 6. Minority public school enrollment 7. Private school enrollment 	<ul style="list-style-type: none"> • FAMILIES 1. Children in single parent families 2. Births to unwed mothers 3. Births to teen mothers 4. Children in foster care 5. Child abuse and neglect 6. Child care affordability 7. Homelessness 	<ul style="list-style-type: none"> • PUBLIC SAFETY 1. Violent crime rate 2. Property crime rate 3. Youths referred for delinquency 4. Youths referred for felonies and misdemeanors 5. Traffic crashes 6. Fatal traffic crashes 7. Drinking and driving 8. Perception of neighborhood safety 9. Recidivism among serious habitual offenders 	<ul style="list-style-type: none"> • HEALTH 1. Health insurance 2. Emergency room visits 3. Infant mortality 4. Low birth weight 5. Sexually transmitted diseases among teenagers 6. Youth smoking 7. Youth drinking 8. Youth substance abuse 9. Youth mental health
<ul style="list-style-type: none"> • EDUCATION 1. School readiness 2. Reading 3. White-African American gap in reading 4. Mathematics 5. White-African American gap in mathematics 6. Writing 7. Third grade retention 8. High school graduation rate 9. High school dropout rate 10. Pursuit of postsecondary education 11. Average teacher salary 12. School safety 13. Adult educational attainment 14. Public library use 15. Class size 16. Students with disabilities 	<ul style="list-style-type: none"> • ECONOMY 1. Unemployment rate 2. Average annual wage 3. Per capita income 4. Children in poverty 5. Child poverty by family 6. Home ownership 7. Affordability of rental 8. Tourism 9. Employment by industry 	<ul style="list-style-type: none"> • COMMUNITY 1. Voter registration 2. Voter turnout 3. Public perception 4. Sprawl 5. Substandard living 6. Use of public transportation 7. Transportation to work 8. Travel time to work 9. Parks and recreation 10. Traffic congestion 	<ul style="list-style-type: none"> • ENVIRONMENT 1. Lake water quality 2. Conservation of natural 3. Water consumption 4. Electricity consumption 5. Recycling 6. Outdoor air quality

Source: QOL Report 2006 the 21st Century Council, Inc., Tallahassee, Florida

The non-indexed measures of the QOL are based on published raw data about all the possible indicators related to the QOL. In each of the indicator categories, several variables measure some issue in the QOL. A shortcoming of this measure is that it is multidimensional, and hence comparisons might be difficult to pick the appropriate indicators for comparison across states, counties or cities. However, this method is more acceptable as a user friendly and non-academic method.

Indicators incorporate Community, Demographics, Economy, Education, Environment, Families, Health, and Public Safety aspects. The possible indicators for Tallahassee are listed in the previous table. (QOL Report, 2006) The next table shows the combined ratings of 1999 QOL factors in the year 1999.

Table 4: The Combined Ratings of QOL Factors in the year 1999

Low crime rate	79.9
Ratings of public schools	72.4
Health facilities	70.4
Housing availability	70.1
Housing costs	69.1
Recreational opportunities	57.6
Climate	58.8
Cultural opportunities	52.5
Colleges and universities in area	52.4

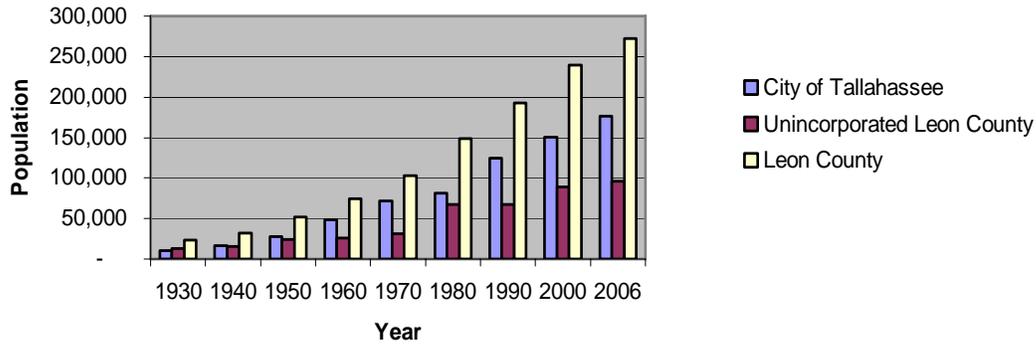
2.C Tallahassee QOL

In the year 2007, the population estimate for the Tallahassee area was 150,627. The 2000 Census showed a population of 150,638, and in 1990, it was 128,556 representing a 17.2% increase. It is projected that the population will be 153,154 in the year 2012, representing an increase of 1.7% from 2007 estimate. The gender distribution in the year 2007 was 47.6% male and 52.4% female. The median age of the population according to 2007 estimate was 28.7 years, compared to the US median age of 36.5 years. The population density was approximately 1,533.1 people per square mile (sq. m). The area of the City of Tallahassee is 98.2 sq. m - 14% of the area of Leon County.⁸

For Leon County, and in the year 2007, the population estimate was 248,467. The 2000 Census showed a population of 239,452, and in 1990, it was 192,495 representing an increase of 24.4%. It is projected that the population will be 257,825 in the year 2012, representing an increase of 3.8% from 2007 estimate. The gender distribution in the year 2007 was 48% male and 52% female. The median age of the population according to 2007 estimate was 31.6 years, compared to the US median age of 36.5 years. The population density was approximately 353.9 pop/sq. m. The area of the Leon County is 702 sq. m.

⁸ The numbers in this paragraph and the next one are all obtained from WITS.

Figure 4: Leon County Population Growth



Source: US department of commerce, Bureau of Census (1930-2000) University of Florida, Bureau of Economic and Business Research (2001-2006 estimates)

In the year 2007, there were 69,890 households in the Tallahassee area. The Census showed household counts of 63,221 households in the year 2000, up from 51,692 households in the year 1990, representing an increase of 22.3%. It was estimated that the number of households will be 74,650 in the year 2012, representing an increase of 6.8% from 2007. The average household size was 2.16 persons in the year 2007. In the year 2007, the median number of years in residence was 2.13. The average household size was 2.00 people and the average family size was 2.72 people. The average number of vehicles per household was 1.7 vehicles.

In the year 2007, the median household income was \$36,555, compared to the US median of \$51,680. The Census showed median household incomes of \$30,943 in the year 2000 and \$24,212 in the year 1990 representing an increase of 27.8%. It was estimated that the median household income will be \$40,237 in the year 2012, which would represent an increase of 10.1% from 2007. In the year 2007, the per capita income was \$25,380, compared to the \$US per capita, which was \$25,232. The 2007 average household income was \$52,150, compared to the US average of \$65,273.

In the year 2007, the racial makeup was as follows: 59.7% White; 34.1% African American; 0.2% Native American; 3.3% Asian/Pacific Islander, and 1.0% other. This can be compared to the US racial makeup of 74.5% White, 12.0% African American, 0.8% Native American, 4.6% Asian/Pacific Islander and 5.3% Other. People of Hispanic ethnicity are counted independently of race. People of Hispanic origin made up 5.1% of the 2007 population when compared to the US makeup of

15.1%. Changes in the population within each race and ethnicity category from the 1990 Census to the 2000 Census were as follows: 26.2% American Indian, Eskimo, Aleut Population; 63.3% Asian, Pacific Islander; 41.0% African American; 64.7% Hispanic Ethnicity; 64.0% other; and White 3.0%.

Table 5: Racial Makeup in the City of Tallahassee in the year 2007

	1990 Census		2000 Census		2007 Estimate		2012 Projection		%	
									1990 to 2000	2007 to 2012
White	88,915	69.2%	91,544	60.8%	89,891	59.7%	90,147	58.9%	3.0%	0.3%
African American	36,245	28.2%	51,116	33.9%	51,340	34.1%	52,337	34.2%	41.0%	1.9%
American Indian or Alaska Native	299	0.2%	378	0.3%	369	0.3%	359	0.2%	26.2%	-2.8%
Asian or Pacific Islander	2,207	1.7%	3,604	2.4%	5,016	3.3%	5,969	3.9%	63.3%	19.0%
Some Other Race	886	0.7%	1,453	1.0%	1,448	1.0%	1,805	1.2%	64.0%	24.6%
Two or More Races			2,543	1.7%	2,562	1.7%	2,536	1.7%		-1.0%
Hispanic Ethnicity	3,798	3.0%	6,254	4.2%	7,645	5.1%	8,929	5.8%	64.7%	16.8%
Not Hispanic or Latino	124,759	97.1%	144,384	95.9%	142,981	94.9%	144,225	94.2%	15.7%	0.9%

Source: WITS, 2007

The median housing value was \$73,865 in the year 1990, compared to the US median of \$78,382 for the same year. The 2000 Census median housing value was \$101,065, which was a 36.8% increase from 1990. In the year 1990, there were 23,996 owner occupied housing units vs. 27,909 in the year 2000. Also in the year 1990, there were 27,697 renter occupied housing units vs. 35,312 in the year 2000. The average rent in the year 1990 was \$354 vs. \$504 in the year 2000. In the year 2007, there were 87,737 people over the age of 16 in the labor force. Of these, 90.2% were employed, 9.6% were unemployed, 29.2% were not in the labor force and 0.1% was in the Armed Forces.

In the year 1990, unemployment was 5.4% and in the year 2000, it was 11.0%. In the year 2007, there were 128,056 employees (daytime population) and there were 8,782 establishments. In the year 1990, 75.6% of employees were employed in white-collar occupations and 24.4% were employed in blue-collar occupations. In the year 2000, white-collar workers made up 74.7% of the population, and those employed in blue-collar occupations made up 25.3%. In the

year 1990, the average time traveled to work was 10 minutes and in the year 2000, it was 18 minutes. The latest available data for unemployment in November 2007 indicates a rate of unemployment in Leon County of 3.2%, compared to 3% a year before. ⁹

2.C.1 Demographics¹⁰

2.C.1.1 Total Number of Residents

Leon County's population from 1980 to 2006 was nearly the same as the average percentage on the state level. It increased by 86% - about the same percentage growth as the state (87%). In the year 1980, Leon County's population included 145,981 people, an increase of 4,800 people per year. Compared with the neighboring counties, Leon County has the largest population in the 4-county region. In fact, the total number of population of the three counties did exceed one third of the population of Leon County. However, Wakulla County, not Leon County, is the fastest growing County, but, its population was significantly smaller.

Table 6: Total Number of Residents by County (1980-2006)

	1980	1985	1990	1995	2000	2006	% change
							1980 to 2006*
Leon	145,981	166,421	192,493	217,185	239,452	271,900	+86%
Wakulla	10,719	12,352	14,202	17,207	22,863	27,421	+156%
Gadsden	41,324	41,975	41,116	43,460	45,087	47,662	+15%
Jefferson	10,585	10,919	11,296	12,832	12,902	14,169	+34%
Florida*	9,753,351	11,272,332	12,938,071	14,335,992	15,982,378	18,232,652	+87%

QOL Report, 2006 the 21st Century Council, Inc., Tallahassee, Florida

The population density numbers in the year 2006 indicate that Leon County dominated the other three counties. Population density reached 351.5 people per sq. m. Compared to 88.5 sq.m; 24.8 sq.m; and 47.5 sq.m in Gadsden, Jefferson and Wakulla Counties, respectively.

2.C.1.2 Percentage of Leon County residents in each age group

As of 2007, children and young adults (ages 0-19) comprised 25.8% of the population. The proportion of the population of the college-age residents (19-24) was 11.7%. The group of ages (0-19), however, remains the county's largest age group with of the overall population. The college-age residents' portion exceeds its counterpart for the other counties. These numbers are important as it reflects the

⁹ The recent unemployment number are obtained from:
<http://tallahassee.com/apps/pbcs.dll/article?AID=/20071228/BUSINESS/712280303/1003>.

¹⁰ The subsections of 2.D are extracted from the following source:
 Quality of Life Report. 2006. The 21st Century Council, Inc., Tallahassee, Florida.

growing age demographics and job potential in the community. This is apparent in the median age of population (31.6 in the year 2007).

Table 7: Age Distribution of Population by County in the Year 2007

	Gadsden	Jefferson	Leon	Wakulla
Total Population	46,558	14,972	248,467	28,803
Total Households	16,520	5,104	110,030	11,032
Female Population	24,570	6,716	129,181	13,645
% Female	52.8%	44.9%	52.0%	47.4%
Male Population	21,988	8,256	119,286	15,158
% Male	47.2%	55.1%	48.0%	52.6%
Population Density (per Sq. Mi.)	88.1	24.5	353.9	46.7
Age 0 - 19	28.4%	22.0%	25.8%	24.2%
Age 20 - 24	7.0%	6.1%	11.7%	7.1%
Age 25 - 34	13.2%	13.8%	17.1%	13.1%
Age 35 - 44	13.4%	14.8%	12.2%	14.9%
Age 45 - 54	14.3%	16.2%	13.2%	16.0%
Age 55 - 64	11.1%	12.8%	10.7%	12.0%
Age 65 - 74	7.2%	7.7%	5.5%	7.7%
Age 75 - 84	4.0%	4.8%	2.8%	4.0%
Age 85 +	1.4%	1.8%	1.0%	1.1%
Median Age	36.1	40.8	31.6	39.1

Source: WITS, 2007

2.C.1.3 Percent of Households at Various Income levels

Compared to Florida and the United States, Leon County has a significantly larger percentage of households in the lowest income group (less than \$10,000 per year). This number should be taken with caution because students form a significant proportion of the population.

2.C.1.4 Number of Students Enrolled In Leon County Public Schools by Grade Level

Public school enrollment in Leon County has remained relatively stable over the last seven years, despite an increase in the county's overall population. Middle and high school students (grades 6-12) comprise 51% of student enrollment in Leon County Public Schools. Overall, enrollment in years 2005-06 was up 1.5% compared with years 2004-05. PreK-5 enrollment was up 2.8%. A slight decrease in enrollment in grades 6-8 was offset by a similar increase in grades 9-12.

2.C.1.5 Minority Public School Enrollment

The indicator used for this is the percent of students enrolled in Leon County Public Schools who were minorities (African American and Other). Leon County public schools are experiencing an increasing percentage of minority students particularly at the elementary level. As of 2005-06, 52% of students in grades PreK-5 were non-White, mainly African American. Although students of "Other" races/ Ethnicities comprise a small proportion of total enrollment, this group showed the largest

proportional increase from 1995-96 to 2005-06 in both elementary and secondary schools.

2.C.1.6 Percent Of Elementary, Middle And High School Students Enrolled In Private School.

While the vast majority of students in Leon County attend public school, 16% in the 2005-06 school year attend private school – a larger percentage than in the state as a whole. The increase in the year 2000-01 reflects the inclusion of pre-kindergarten students in the count that year.

2.C.1.7 Private School Enrollment

Table 8: Leon County Private School Enrollment (1997-2006)

Private School	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Leon - # enrolled*	4,899	4,722	4,726	5,866	5,585	5,983	5,884	6,709	6,146
Leon -% enrolled	13.5%	13.0%	13.0%	15.5%	14.9%	15.8%	15.4%	17.4%	16.0%
Florida -% enrolled	10.6%	10.5%	10.8%	12.5%	12.4%	12.9%	12.8%	12.9%	11.6%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.2 Families

2.C.2.1 Children in Single Parent Families (Percentage of Children, under Age 18, Who Live in Single Parent Families (Rather Than in Married- Couple Families)

In the year 2000, nearly one in three children in Leon County lived in a single parent family – a higher percentage than in Florida or the United States. The percent of children living in single parent families has increased over the past decade in Leon County, the state and the nation. A single female heads most of these families.

Table 9: Children in Single Parent Families in the year 1990 and 2000

Children in single parent families	1990	2000	Difference 1990 to 2000
Leon County	27.4%	32.0%	+4.6%
Florida	24.5%	29.4%	+4.9%
United States	21.5%	25.3%	+3.8%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.2.2 Percent of Births to Unwed Mothers by Race

The percentage of babies born to unwed mothers continues to increase slowly in Leon County. In Leon County in the year 2005, African American children were more than three times as likely to be born to unwed mothers as White children were. Overall, Leon County continues to mirror the state as a whole on this indicator. Just over two in five babies of all races are born to unwed mothers in Florida.

Table 10: Percent of Births to Unwed Mothers by Race (1997-2005)

Births to unwed mothers	1997	1998	1999	2000	2001	2002	2003	2004	2005
Leon -White	16%	17%	19%	18%	19%	22%	19%	23%	22%
Leon -African American	69%	70%	69%	69%	70%	67%	72%	70%	74%
Leon – Total -all races	36%	37%	38%	38%	38%	39%	40%	41%	42%
Florida – Total -all races	36%	37%	37%	38%	39%	39%	40%	41%	43%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.2.3 Births to Teen Mothers (Number of Teenage Mothers, Ages 15-19, Who Gave Birth per 1,000 Teenage Girls Ages 15-19)

Overall, the rate of births to teenage mothers has been declining in Leon County and in Florida. A significant racial disparity exists but the gap is closing somewhat, primarily because of the decline in the rate of births to African American teenagers. The rate of births to teens in Leon County for all races is less than half the state rate.

Table 11: Births to Teen Mothers (1997-2005)

Births to teen mothers	1997	1998	1999	2000	2001	2002	2003	2004	2005
Leon -White	13.9	14.4	13.2	14.5	11.5	13.0	11.6	9.9	12.5
Leon -African American	46.7	48.6	42.1	41.5	36.4	34.4	32.8	29.4	30.9
Leon – Total -all races	23.7	25.0	22.6	23.7	20.1	20.3	19.2	18.1	19.9
Florida – Total - all races	55.5	54.0	51.6	50.4	47.2	44.3	42.4	41.6	41.9

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.2.4 Number of Children under Age 18 Who Are In Foster Care or Residential Group Care under the Custody of the Florida Department of Children and Families (DCF)

In this region of Florida, the number of children in foster care and residential group care has increased over the past two years in District 2 but has remained stable for the State. Leon County saw an increase of 13 children in foster or residential group care between 2004 and 2005. District 2 includes 14 counties in North Florida, including Leon.

Table 12: Number of Children under Age 18 Who Are in Foster Care or Residential Group Care under the Custody of the Florida Department of Children and Families (1997-2005)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
DCF District 2 Number of children	321	342	380	378	345	311	309	304	380	417
Leon County Number of children	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	113	126
Florida-Number of children*	8,941	8,950	9,875	10,430	10,885	10,657	11,285	11,476	11,342	11,137

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.2.5 Child Abuse and Neglect (Number Of Child Abuse and Neglect Victims (Per 100,000 Children under Age 18) Whose Maltreatment Was Verified or Found To Have Some Evidence of Occurrence)

The rate of child abuse and neglect in Leon County has remained at relatively the same level over the past few years. Leon County's rate was the same or higher than the statewide rate until 2000-01, when it dropped below the state rate. The unusually high rates for Florida in the year 2000-01 and 2001-02 most likely reflect a statewide initiative to investigate backlogged cases. The same child may be counted more than once if involved in more than one incident. An unusually high rate in a single year is most likely due to a reduction of backlog (closure of a high number of reports from prior years), while an unusually low rate may be due to growth in backlog. 2002-2003 data are incomplete due to a new reporting system that was phased in across the state.

2.C.2.6 Child Care Affordability (Cost of Childcare in Leon County as a Percentage of Family Income)

The average family with children pays a substantial portion of their income on childcare – especially if they have more than one child in need of care. Single parent families are at a particular disadvantage because their median income is less than one-third of the income of married couples with children.

2.C.2.7 Homelessness (Number of Homeless People in Tallahassee)

In the year 2005, 739 people in Tallahassee reported having no regular place to stay or expected to be forced to leave their home within the next week without another place to go. Almost half (46%) of the city's homeless in both 2003 and 2005 were children, ages 0-18. (1) Interviews conducted during a 15-hour period on January 24, 2005 at emergency shelters, congregate meal programs, day labor programs, social service agencies, public places and street and wooded locations frequented by homeless individuals, and (2) data from the Leon County School District's family survey and administrative records.

2.C.3 Public Safety

2.C.3.1 Violent Crime Rate (Number of Violent Crimes Reported Per 100,000 Residents)

Leon County's violent crime rate decreased in the year 2006, after two years of slight increase in both 2004 and 2005, and after declining each year between 1999 and 2003. The gap between Leon County and Florida has narrowed since the mid 1990's. However, Leon County and Florida's rate continues to be well above that

of the nation. This includes murder and non-negligent manslaughter, forcible rape, robbery and aggravated assault.

Table 13: Violent Crime Rate (1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Leon County	1229.6	1066.3	1105.5	1054.5	1006.1	846.2	736.6	756.4	781.6	776.5
Florida	1025.0	931.1	841.0	801.1	798.0	767.1	727.7	706.2	702.2	705.8
United States	611.3	567.5	523.0	506.5	504.4	494.4	475.8	465.5	*	

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida.. Numbers for 2006 are from Florida Statistical Analysis Center: FDLE, (1989-2006). Crime in Florida, Florida

2.C.3.2 Property Crime Rate (Number of Property Crimes Reported Per 100,000 Residents)

Leon County's property crime rate steadily declined between 1995 and 2004 and increased a negligible amount in the year 2005. In the year 2004, Leon County's property crime rate was lower than the state's for the first time in ten years. Even though this rate increased in the year 2005, it decreased again in the year 2006. Property crimes include burglary/ breaking, entering, larceny/theft, motor vehicle theft, and arson.

Table 14: Property Crime Rate (1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Leon County	7345.6	6764.9	6034.4	5913.1	5687.8	5516.1	4871.2	4112.2	4149.6	3842.2
Florida	6273.1	5902.7	5257.1	4803.2	4781.9	4631.3	4436.5	4149.1	3974.9	3926.0
United States	4318.7	4051.8	3743.6	3618.3	3658.1	3624.1	3588.4	3517.1	*	*

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida.. Numbers for 2006 are from Florida Statistical Analysis Center: FDLE, (1989-2006). Crime in Florida, Florida

2.C.3.3 Youth Referred For Delinquency Percent of Youths Ages 10-17 Who Were Referred To the Florida Department of Juvenile Justice for Delinquency)

The percentage of youths referred for delinquent acts in Leon County remained at 5% in the year 2005-06. Leon County's rate of youth referrals has been identical to the State average over the past three years after being below the State average for the two years prior to that.

2.C.3.4 Youths Referred For Felonies and Misdemeanors (Number of Youths in Leon County Referred To the Florida Department of Juvenile Justice for Felonies vs. Misdemeanors)

In Leon County, a greater number of youths are referred for misdemeanors than felonies (generally more serious crimes) Youth referrals for both misdemeanors and felonies have remained at similar levels in four of the past five years with 2003-04 experiencing the most felonies and misdemeanors in a year.

2.C.3.5 Traffic Crashes (Number Of Traffic Crashes per 10,000 Licensed Drivers, By Age Group (15-19 and 20-24))

In Leon County and Florida, drivers ages 15-19 and 20-24 have higher traffic crash rates than any other age group. Crash rates for young drivers are consistently higher in Leon County than in Florida. In the year 2005, traffic crash rates for age groups 15-19 and 20-24 decreased somewhat in Leon County when compared to 2004 while increasing at a marginal rate in Florida.

Table 15: Traffic Crashes (1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Leon, ages 15-19	889.90	1,023.10	960.65	835.07	796.73	1,012.39	926.00	1,001.50	937.00
Leon, ages 20-24	674.07	755.84	667.19	608.20	563.69	769.70	969.39	713.60	685.00
Florida, ages 15-19	645.16	626.26	597.00	553.83	553.36	516.51	489.54	485.03	488.97
Florida, ages 20-24	470.92	452.37	425.30	404.80	412.40	395.56	382.13	392.86	417.16

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.3.6 Fatal Traffic Crashes (Number of drivers, by age, in traffic crashes in Leon County that resulted in fatalities)

In Leon County, the number of drivers in fatal traffic crashes increased sharply in the year 2005, resulting in the most drivers in fatal crashes in a single year in more than a decade! Young drivers (age 15-24) accounted for 34% (seventeen out of fifty) of drivers in fatal crashes in the year 2005.

Table 16: Fatal Traffic Crashes (1997-2005)

Fatal crashes	1997	1998	1999	2000	2001	2002	2003	2004	2005
Drivers aged 15-19	2	3	3	9	3	5	5	2	3
Drivers aged 20-24	6	3	0	7	4	8	8	3	14
Total -drivers all ages	29	18	12	43	23	34	39	21	50 34%
Percent - drivers age 15-24*	28%	33%	25%	37%	30%	38%	33%	24%	

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.3.7 Number of Traffic Crashes Involving a Drinking Driver per 10,000 Licensed Drivers, By Age Group (15-19 and 20-24)

Drinking and driving is a serious problem in Leon County, particularly for the 20-24 age groups. Leon County's rates of "drinking driver" crashes for both 15-19 and 20-24 year olds are significantly higher than the rates for the State. The percent of total fatalities alcohol-related in Leon County for all ages reached 50% in the year 2005 with 21 deaths from alcohol-related traffic crashes.

2.C.3.8 Drinking and Driving

Table 17: Drinking and Driving (1997-2005)

Traffic crashes involving a drinking driver	1999	2000	2001	2002	2003	2004	2005
Leon, ages 15-19	31.65	39.13	40.08	37.74	33.13	29.00	30.00
Florida, ages 15-19	15.23	16.75	17.58	14.38	14.30	13.79	13.57
Leon, ages 20-24	46.03	43.94	51.28	43.35	40.24	40.50	40.00
Percent of total fatalities alcohol-related							
Florida, ages 20-24	24.27	24.68	27.24	23.60	24.24	25.32	25.95
Leon County – all ages*	31%	42%	32%	33%	33%	47%	50%
Florida – all ages*	32%	33%	33%	32%	34%	34%	35%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.3.9 Perception of Neighborhood Safety (Percent of Adult Tallahassee Residents Who Report Feeling Safe in Their Neighborhood)

The vast majority of Tallahassee residents say they feel safe in the neighborhood where they live. As of years 2003, residents were less likely to feel safe if they lacked a high school diploma (91%), had an income under \$10,000 (89%) or lived in the following zip codes: 32311 (80%), 32305 (90%), 32310 (90%), or 32304 (91%)

Table 18: Perception of Neighborhood Safety (1997-2005)

	1999	2000	2001	2002	2003
Percent of adults who say they feel safe in their neighborhood	92%	92%	92%	96%	94%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.3.10 Recidivism among Serious Habitual Offenders (Percent of Serious Habitual Offenders (Under Age 18) Who Are Crime-Free One Year after Their Arrest or Release from a Commitment Facility)

In the year 2005, Tallahassee/Leon County had 48 youths under 18 who had a history of repeatedly committing serious crimes. Usually, these juveniles are in and out of the juvenile justice system with no improvement in their behavior. These serious habitual offenders account for a very small percentage of juvenile offenders, but they typically account for over one third of juvenile arrests. Currently, these youths are served by the Serious Habitual Offender Comprehensive Action Program, a multi-agency program focusing increased attention to these juveniles.

Table 19: Crime Statistics in Tallahassee (2003-2005)

Tallahassee-Leon County	2003	2004	2005
Number of serious habitual offenders (under age 18)	45	37	48
Number crime free after one year	6	2	3
Percent crime free after one year	13%	5%	6%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.4 Health

2.C.4.1 Health Insurance (Percentage of Children and Non-Elderly Adults Who Do Not Have Health Insurance)

In the year 2004, according to the Florida Agency for Health Care

Administration's Florida Health Insurance Survey, 7.7% of Leon County residents (ages 0-64) did not have any health insurance through Medicaid, private insurance or other sources. This percentage was the lowest of any county in the State. (Seniors age 65+ are not shown because most are covered by Medicare)

Table 20: Health Insurance for 1999 and 2004

	1999	2004
Leon County, Ages 0-18	11.0%	n/a
Leon County, Ages 0-64	14.0%	7.7%
State of Florida, Ages 0-18	13.9%	12.1%
State of Florida, Ages 0-64	16.8%	19.2%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.4.2 Emergency Room Visits (Number Of Visits To Emergency Rooms At Tallahassee Memorial Hospital (TMH) And Capital Regional Medical Center (CRMC), Reported For All Ages.)

From 1996 to 2004, the number of hospital emergency room (ER) visits in Leon County increased at a much higher rate (48%) than the population (18%). TMH continues to receive the largest number of ER visits in the county. However, CRMC accounted for 34% of emergency room visits to Tallahassee hospitals in the year 2004 up from 26% in the year 1996. TMH data are reported for fiscal years ending in the date shown. CRMC data are reported by calendar year.

Table 21: Emergency Room Visits (1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004	Percent Change 1996-2004
TMH*	55,105	58,687	62,461	63,954	62,229	63,552	64,513	68,837	31%
CRMC	16,621	16,804	18,723	19,675	22,193	26,212	30,419	36,202	96%
TOTAL	71,726	75,491	81,184	83,629	84,422	89,764	94,932	105,039	48%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.4.3 Infant Mortality (Number of Infants, Per 1,000 Live Births, Who Died Before Their First Birthday – By Race)

The infant mortality rate for all races in Leon County is consistently higher than in Florida (As of years 2003-05, 9.7 per 1,000 live births in Leon County compared to 7.2 in Florida). Both Leon County and Florida show a major disparity between Nonwhites and Whites on infant mortality. The Nonwhite-White gap in Leon County has remained stable over the past three years.

2.C.4.4 Low Birth Weight (Percent of Full-Term and Premature Babies Who Weighed Less Than 5 Lbs., 9 Oz. at Birth)

On average, the percentage of babies born with a low birth weight tends to be higher in Leon County than in Florida. Black babies are about twice as likely to be

born with a low birth weight as White babies in Leon County. This is also the case on the state level.

2.C.4.5 Sexually Transmitted Diseases among Teenagers (Number of New Cases of Chlamydia and Gonorrhea, Per 100,000 Females Ages 15-19)

The reported incidence of Gonorrhea and Chlamydia has risen considerably among Leon County teenagers ages 15-19. The increase is particularly dramatic for Chlamydia. Historically, Leon County’s rates for this age group have been lower than the state’s. However, since 2000-02, Leon County’s teenagers have had a considerably higher incidence of both Gonorrhea and Chlamydia than teenagers have in the state as a whole.

Table 22: Sexually Transmitted Diseases among Teenagers (1996-2005)

	1996-98	1997-99	1998-00	1999-01	2000-02	2001-03	2002-04	2003-05
Chlamydia - Leon	1,951	1,755	1,390	2,060	2,694	3,601	3,735	3,622
Chlamydia - Florida	2,040	2,115	2,171	2,352	2,436	2,522	2,499	2,410
Gonorrhea - Leon	668	620	553	785	917	1,095	1,065	985
Gonorrhea - Florida	796	810	810	814	761	690	642	612

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.4.6 Youth Smoking (Percent of Youth Surveyed Who Reported Smoking within the Last 30 Days)

Cigarette smoking among youth has been declining in Leon County and in Florida. High school students in Leon County reported a significant decline, from 26.2% in the year 2000 to 13.2% in the year 2004.

Table 23: Youth Smoking (1997-2005)

	2000	2004
Leon County - High Schools	26.2%	13.2%
Florida – High Schools	21.7%	15.0%
Leon County - Middle Schools	13.1%	7.4%
Florida - Middle Schools	9.8%	6.9%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.4.7 Youth Drinking (Percent of Students Who Reported That They Were Current Drinkers (One or More Drinks in the Last 30 Days) and Binge Drinkers (5 or More Drinks in One Sitting In the Last 2 Weeks)

As of the Year 2004, underage alcohol consumption was a problem locally and statewide. In Leon County, almost 38% of high school students reported drinking alcohol in the last 30 days; 17% reported binge drinking in the last 2 weeks. Middle school students reported lower consumption, but still substantial drinking for that age group.

Table 24: Youth Drinking in the Year 2004

	One or more drinks in last 30 days	5 or more drinks in one sitting in last 2 weeks
Leon County - High Schools	37.8%	17.2%
Florida - High Schools	42.0%	22.0%
Leon County - Middle Schools	21.4%	8.8%
Florida - Middle Schools	20.3%	8.5%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.4.8 Youth Substance Abuse (Percent of Students Who Reported That They Used Various Substances within the Last 30 Days)

Alcohol use is much more common than drug use among high school and middle school students in Leon County and in Florida. Both are more common among high school students than middle school counterparts. In Leon County, the percent of high school and middle school students using marijuana is above state averages and illicit drugs other than marijuana, below the state average.

Table 25: Youth Substance Abuse in the Year 2004

	Marijuana	Illicit drug other than Marijuana	Alcohol
Leon County - High Schools	17.7%	7.1%	37.8%
Florida - High Schools	16.4%	7.5%	42.0%
Leon County - Middle Schools	6.5%	7.1%	21.4%
Florida - Middle Schools	5.3%	8.6%	20.3%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.4.9 Youth Mental Health (Percent Of Middle And High School Students Who Said "Yes" When Asked, "In The Past Year, Have You Felt Depressed Or Sad MOST Days, Even If You Felt OK Sometimes?")

In the year 2004, a substantial percentage (44.7%) of grade 6-12 students in Leon County reported that they felt depressed or sad most days in the past year. The percentage (48.2%) was even higher for grade 6-12 students in the state as a whole. In Leon County and the State, this problem was slightly more often reported by middle school than high school students were.

Table 26: Youth Mental Health in the Year 2004

2004	Leon County	Florida
Middle school	45.8%	49.9%
High school	43.7%	46.7%
Total – grades 6-12	44.7%	48.2%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5 Education

2.C.5.1 School Readiness (Percent of Kindergartners Entering Public School Ready to Learn)

In the year 2004, Kindergartners did not meet expectations for school readiness in Leon County. A significant gap generally 50% existed between Leon

County White and African American. A large majority of kindergartners enter Leon County Public Schools ready to learn and a slightly higher.

2.C.5.2 Reading (Percent of Leon County Public School Students Scoring Three or Above In Reading on the Florida Comprehensive Assessment Test (FCAT))

Reading performance declined in Leon County in the year 2006 compared with 2005 levels in meeting proficiency standards (three or above) for their grade level. The state showed improvement for eighth graders and no improvement for tenth graders in the year 2006. However, at all grades assessed, Leon County students continued to outperform students in the state as a whole.

2.C.5.3 Percent of Leon County Public School Students Who Scored Three or Above In Mathematics on the Florida Comprehensive Assessment Test (FCAT)

Mathematics achievement of Leon County students improved marginally in the year 2006 for grade 5 and decreased slightly for grades 8 and 10 compared with 2005 levels. As in reading, Leon County students consistently outperform students in the state at all grade levels assessed. ¹¹

2.C.5.4 Mathematics

The FCAT is administered during February-March of each school year. Only students in grades 5, 8, and 10 have been tested in Mathematics since 1999. Students in grades 3 -10 have been tested since 2002.

Table 27: Mathematics Performance (1999-2006)

	1999	2000	2001	2002	2003	2004	2005	2006
Grade 5 – Leon County	48%	53%	57%	56%	62%	61%	63%	64%
Grade 5 – Florida*	35%	46%	48%	48%	52%	52%	57%	57%
Grade 8 – Leon County	52%	63%	68%	66%	69%	69%	71%	68%
Grade 8 – Florida*	44%	51%	55%	53%	56%	57%	59%	60%
Grade 10–Leon County	54%	60%	68%	70%	73%	77%	78%	75%
Grade 10 – Florida*	47%	51%	59%	60%	60%	64%	63%	65%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida..

2.C.5.5 Writing (Percent of Leon County Public School Students Scoring Three and Above (3.5 and Above For Writing+) on the Florida Comprehensive Assessment Test (FCAT) Writing+)

On the FCAT, a significantly larger percentage of students score three or above in writing compared to mathematics and reading. Writing performance declined in Leon County in the year 2006 compared with 2005 levels for 4th and 10th

¹¹ Results are shown for all curriculum students, including those in exceptional student education who are expected to pursue a standard high school diploma.

graders in meeting proficiency standards (3.5 or above) for their grade level. The state showed improvement for fourth and eighth graders and a decline for 10th graders in the year 2006. The FCAT is administered February-March of each school year. Currently, only students in grades 4, 8 and 10 are tested in Writing. ¹²

Table 28: Writing (2002-2006)

	2002	2003	2004	2005	2006
Grade 4 – Leon County	55%	70%	72%	79%	76%
Grade 4 – Florida*	52%	69%	69%	74%	76%
Grade 8 – Leon County	82%	81%	77%	85%	89%
Grade 8 – Florida*	74%	76%	73%	76%	83%
Grade 10 – Leon County	86%	82%	83%	91%	85%78%
Grade 10 – Florida*	79%	77%	79%	79%	

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5.6 Percent of Third Graders Who Were Retained (Not Promoted To 4th Grade)

In Leon County public schools, the percentage of third graders retained increased sharply over the 3-year period from 1997-98 to 1999-00, when the state and district increased requirements for promotion to 4th grade. The increase from 00-01 to 02-03 reflects an even stricter state policy requiring an FCAT Reading score of three or above for promotion to 4th grade, with limited allowance of exemptions by district. The impact of this new policy was much more dramatic statewide than in Leon County schools.

Table 29: Third Grade Retention (1996-2005)

	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05
Leon – number	46	180	199	222	123	180	223	208	236
Leon – percent	1.9%	7.6%	8.0%	8.9%	4.9%	7.3%	9.4%	8.9%	9.2%
Florida – percent	1.5%	2.4%	3.3%	3.3%	3.0%	3.3%	14.4%	10.7%	9.5%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5.7 High School Graduation Rate (Percent of First-Time 9th Graders in Public Schools Who Earned a Standard High School Diploma in Four Years)

Graduation rates declined in Leon County from 1997 to 2001, increased steadily from 2002 to 2004 and leveled off last year. In nine of the last ten years, Leon County’s graduation rate was the same or above the state graduation rate.

¹² See previous footnote.

Table 30: High School Graduation Rate (1996-2005)

	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05
Leon County	81%	70%	65%	67%	64%	74%	76%	80%	80%
Florida	73%	72%	60%	62%	64%	68%	69%	72%	72%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5.8 High School Dropout Rate (Percent of Public School Students Age 16 and Older Who Dropped Out Of School)

Overall, Leon County's dropout rate declined in the year 2004-05 after increasing the previous school year. Since 1998-1999, the drop out rate in Leon County has declined much more slowly than the state rate. In the year 2001-02 and 2003-04, Leon County's dropout rate exceeded the state rate.

Table 31: High School Dropout Rate (1996-2005)

	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05
Leon County	4.6%	3.8%	4.0%	3.5%	3.1%	3.4%	2.7%	3.1%	2.8%
Florida	5.4%	4.8%	5.4%	4.6%	3.8%	3.2%	3.1%	2.9%	2.8%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5.9 Pursuit of Postsecondary Education (Indicator: Percent of Public High School Graduates Who Entered Community College or 4-Year Colleges And Universities In Florida The Fall After Graduation)

The percentage of high school graduates in Leon County that pursued postsecondary education immediately after high school declined at all high schools in years 2003-04 compared with 2002-03.

Table 32: Pursuits of Postsecondary Education (1996-2004)

Leon County	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
Lincoln H.S.	67%	69%	73%	67%	77%	73%	80%	74%
Leon H.S.	63%	64%	71%	70%	72%	72%	74%	70%
Godby H.S.	55%	48%	59%	55%	63%	73%	64%	60%
Rickards H.S.	47%	55%	57%	55%	54%	62%	68%	65%
Chiles H.S.	n/a	n/a	n/a	n/a	n/a	80%	80%	77%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5.10 Average Teacher Salary (Average Teacher Salary in Grades K12 in Public Schools)

The gap between Leon County and Florida regarding average teacher salary increased slightly from 2003-04 (\$1,481) to 2004-05 (\$1,620), and improved slightly in comparison with Georgia (\$6,821) 2003-04 vs. (\$6,568) 2004-05. Wakulla County's gap with Leon remained more than \$3,000 for the third straight year. The Georgia-Leon gap is the Georgia average teacher salary minus the Leon County average teacher salary.

Table 33: Average Teacher Salary in Leon County, Florida and Georgia (1996-2005) (\$)

	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05
Leon County	32,371	31,871	33,408	33,264	36,454	36,269	38,719	39,117	39,958
Georgia	35,596	37,291	39,675	41,023	42,216	44,073	45,533	45,938	46,526
Florida	33,885	34,475	35,749	36,524	38,299	39,272	40,275	40,598	41,578
Jefferson County	29,596	31,091	31,083	30,841	34,012	33,635	34,643	33,022	35,094
Gadsden County	28,802	29,458	29,888	30,562	30,846	31,750	32,831	32,428	32,656
Wakulla County	29,568	29,743	31,332	32,717	34,238	35,046	35,473	35,752	36,897
Florida-Leon gap	1,514	2,604	2,341	3,260	1,845	3,003	1,556	1,481	1,620
Georgia-Leon gap	3,225	5,420	6,267	7,759	5,762	7,804	6,814	6,821	6,568

QOL Report, 2006 and 2007, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5.11 School Safety (Number of School Safety Incidents Reported Per 1,000 K-12 Students in Public Schools)

In general, public schools in Leon County have maintained a stable level of safety. However, the rate of total incidents in Leon County has been above the statewide rate for four straight years and was 61% higher than the State rate in the year 2004-05. The number of incidents of violent acts against persons in Leon County public schools jumped from 140 to 269 occurrences between the 2003-04 and 2004-05 school year.

2.C.5.12 Adult Educational Attainment (Percent of Adults Age 25 and Older In Leon County Who Completed High School and Postsecondary Education)

Educational attainment in Leon County is significantly above the state average. In the year 2005, the percent of the population 25 and older with a bachelor's degree was 26% in Leon County compared to 16% in Florida; the percent with graduate/professional degrees was more than double the statewide average. The American Community Survey is limited to household population and excludes the population living in institutions, college dormitories and other group quarters.

Table 34: Adult Educational Attainment in the Year 2005

	Leon County	Florida
No high school diploma	9%	15%
High school diploma	18%	31%
Some college	20%	20%
Associate degree	9%	8%
Bachelor's degree	26%	16%
Graduate or professional degree	19%	9%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5.13 Public Library Use (Number of Volumes Borrowed Per Resident in Areas Served By Public Libraries)

Public library use (as measured by circulation of printed materials per resident) is higher in Leon County than in Florida as a whole. Leon County's circulation per capita has steadily increased since 1997-98 but remains significantly lower than in Alachua County, the Florida County with the highest circulation per

capita.

Table 35: Public Library Use (1994-2004)

	1994-95	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
Leon	6.53	6.61	6.34	5.99	6.30	6.61	6.87	7.33	7.92	7.84
Alachua	9.73	10.72	10.90	10.92	10.49	10.09	11.11	10.97	11.44	11.09
Florida	5.19	5.44	5.00	4.83	4.78	4.69	4.93	5.21	5.42	5.40

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5.14 Class Size: Average Number of Students per Class in Elementary, Middle and High School

In the year 2002, a state constitutional amendment capped the number of students per core-curriculum classroom at 18 in grades PK-3, 22 in grades 4-8 and 25 in grades 9-12. These caps are to be achieved by the beginning of the school year 2010-11. To date, Leon County is on track for achieving this goal. As of January 2006, Leon County's average class size for the district was at or below these targets at each grade level and was lower than the average for the state as a whole. By 2010-11, these caps will have to be met in every classroom.

Table 36: Average Number of Students per Class in Elementary, Middle and High School (2002-2006)

	2002-03	2003-04	2004-05	2005-06
Leon PK-3	20.5	18.2	17.8	18.0
Florida PK-3	23.1	20.5	19.0	18.2
Leon 4-8	22.1	20.8	20.7	19.9
Florida 4-8	24.2	22.4	21.3	20.5
Leon 9-12	22.8	22.8	22.0	21.5
Florida 9-12	24.1	24.1	23.7	23.0

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.5.15 Students with Disabilities (Percent of Students with Disabilities Scoring At or Above Grade Level in Reading and Mathematics on the Florida Comprehensive Assessment Test (FCAT))

Table 37: Students with Disabilities in the year 2005

Students With Disabilities	Leon	Wakulla	Alachua	Florida
Percent of K-12 students with disabilities (2005)	19%	19%	19%	15%
Reading (2005), grades 3-10	39%	32%	26%	28%
Mathematics (2005), grades 3-10	41%	39%	28%	30%
Percent of grades 3-10 students tested (2005)	98%	99%	98%	98%
Graduation rate (2004)	42%	48%	32%	37%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

In Leon County, students with disabilities (see table) perform well below the general student population. In the year 2005, 39% of Leon County students with disabilities were able to read at or above grade level and 41% scored at or above grade level in math. However, students with disabilities expected to earn a regular high school diploma in Leon County Public Schools have considerably higher

achievement than their peers in Alachua County and the state as a whole.

Disabilities include mental retardation, hearing impairments (including deafness), speech or language impairments, visual impairments (including blindness), serious emotional disturbance, orthopedic impairments, autism, traumatic brain injury, other health impairments, or specific learning disabilities. Data include only those students who, according to their individualized educational plan, are expected to receive a regular high school diploma, rather than a special diploma or certificate of completion.

2.C.6 Economy

2.C.6.1 Unemployment Rate (Percentage of People Age 16 and Older Who Were Seeking But Unable To Find Work)

Leon County's unemployment rate has remained consistently below Florida's and the nations. The unemployment rate has fallen in Leon County each of the past three years (2003-2005).

Table 38: Unemployment Rates in Leon County, Florida and USA (1997-2005)

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Leon County	2.9%	2.6%	3.0%	3.5%	4.4%	4.1%	3.8%	3.3%	3.0%	3.2%
Florida	4.5%	4.0%	3.8%	4.6%	5.7%	5.3%	4.8%	3.8%	3.3%	4.3%
United States	4.5%	4.2%	4.0%	4.7%	5.8%	6.0%	5.5%	5.1%	4.4%	5.0%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida .Data for the years 2006 and 2007 are from the source: Labor Market Statistics, DOL.

2.C.6.2 Average Annual Wage (Average Annual Wage and Salary per Full-And Part-Time Job)

In current dollars, Leon County's average wage during the period 1998 to 2005 was between \$943 and \$1,494. This is below the state average with the greatest gap in the most recent two years for which data is available (2004 and 2005). In constant (inflation-adjusted) dollars, the average wage in Leon County has grown 3.8% (0.5% per year average) over the time-period compared with 6.5% (0.9% per year average) for the State (numbers are adjusted in the year 2005 dollars)

Table 39: Average Annual Wage (1998-2005)

	1998	1999	2000	2001	2002	2003	2004	2005
Leon County	\$27,237	\$28,098	\$29,255	\$30,291	\$31,449	\$32,059	\$33,742	\$34,637
Florida	\$28,189	\$29,041	\$30,566	\$31,551	\$32,428	\$33,553	\$35,159	\$36,804
Leon County – Inflation Adjusted	\$33,379	\$33,530	\$33,549	\$33,657	\$34,333	\$34,142	\$34,930	\$34,637

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.6.3 Per Capita Income Average Personal Income from Wages, Public Pensions, Social Security, Interest, Public Assistance, and Other Sources

In current dollars, per capita personal income in Leon County has remained slightly below state and national averages since 1996. In constant (inflation-adjusted) dollars, per capita personal income growth between 1997 and 2004 in Leon County was nearly identical to the State (10.2% in Leon County, 10.3% for the State of Florida).

Table 40: Per Capita Income, Average Personal Income from Wages, Public Pensions, Social Security, Interest, Public Assistance, and Other Sources (1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004
Leon County	\$22,536	\$24,153	\$25,345	\$26,068	\$27,248	\$27,783	\$28,252	\$29,959
Florida	\$24,502	\$25,987	\$26,894	\$28,509	\$29,273	\$29,709	\$30,128	\$31,469
United States Adjusted for inflation (in the year 2004 dollars)*	\$25,334	\$26,883	\$27,939	\$29,845	\$30,574	\$30,810	\$31,484	\$33,050
Leon County*	\$27,022	\$28,415	\$29,065	\$28,773	\$29,173	\$29,245	\$29,036	\$29,959
Leon annual rate of change*	+0.0%	+5.2%	+2.3%	-1.0%	+1.4%	+0.2%	-0.7%	+3.2%
FL annual rate of change*	+0.7%	+4.1%	+0.9%	+2.0%	-0.4%	-0.2%	-1.0%	+1.6%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.6.4 Children in Poverty¹³

According to Census Bureau's Small Area Income & Poverty Estimates, in the year 2003 the percent of children ages 0-17 living in poverty increased in Leon County, the State of Florida and the U.S. since the 2000 Census. The rate of increase in Leon County was less than that of the State or the nation.

Table 41: Children in Poverty (1990-2003)

	1990	2000	2003
Leon County	15.7%	16.2%	16.6%
Florida	18.3%	17.2%	19.3%
United States	17.9%	16.1%	17.6%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.6.5 Child Poverty by Family Type and Age¹⁴

Children in single; female-headed families are much more likely to be in poverty than children in married-couple families. This is particularly true for very young children under age 5. Leon County has a slightly lower percentage in comparison with Florida in this measure for all age groupings and family types indicated. The American Community Survey is limited to household population and

¹³ Percent of children, ages 0-17, living in families below the federal poverty level (e.g., in the year 2003, \$14,824 for a one-parent family with two children; \$18,660 for a two-parent family with two children

¹⁴ Percent of children living below the federal poverty level, by age group (under age five vs. Under age 18) and family type (female headed family, no husband present vs. Married couple family),

excludes the population living in institutions, college dormitories and other group quarters.

Table 42: Child Poverty (2005)

	Leon	Florida
Single parent - under age 18	28.6%	33.1%
Married couple - under age 18	6.6%	6.7%
Single parent – under age 5	38.6%	41.1%
Married couple – under age 5	5.2%	6.4%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.6.6 Home Ownership (Percent of Housing Units That Were Owner-Occupied)

Leon County lags the state and the nation for homeownership rates. The relatively low level of home ownership in the area reflects the large number of college students.

Table 43: Home Ownership (2005)

	Owner-occupied	Renter-Occupied
Leon County	60%	40%
Florida	70%	30%
United States	67%	33%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.6.7 Affordability of Rental Housing¹⁵

In Leon County, almost exactly one-half of renters bear a heavy cost burden for housing relative to income. The percentage of renters paying 30% or more of household income on rent is slightly lower than in Florida but higher than the nation. The data for Leon County reflects the large number of college students in Leon County’s rental market.

Table 44: Affordability of Rental Housing (2005)

Leon County	49.9%
Florida	50.9%
United States	45.7%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.6.8 Tourism (Millions of Dollars Spent By Visitors to Leon County)

The number of visitors and their total spending in Leon County rose dramatically between 1997 and 2000. The decrease in total spending since 2000 reflects the recession and “9/11.” Tourism began to rebound from these events in the year 2002, but between 2003 and 2004, total spending has been relatively stagnant despite an overall rise in the average annual number of visitors.

¹⁵ Percent of rental units for which occupants spent 30% or more of household income on rent.

Table 45: Tourism (1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Total tourist spending (in millions)	\$429	\$613	\$701	\$988	\$853	\$874	\$774	\$805	\$772
Number of tourist visits (in millions)	1.850	1.940	2.133	2.433	2.203	2.352	2.571	2.784	2.751

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.6.9 Employment by Industry (Number of People Employed in the Tallahassee Metropolitan Statistical Area (MSA) In Higher Versus Lower Wage Non-Agricultural Industries)

The employment rates grew in the Tallahassee MSA in the late 1990s; declined slightly in the years 2001 and 2002; but has risen steadily between the years 2003 and 2005. Fueled primarily by gains in the lower and middle wage category, higher wage jobs account for a relatively high proportion of employment in the Tallahassee area because of the inclusion of federal, state and local workers. The Tallahassee MSA includes Leon, Gadsden, Wakulla and Jefferson counties government. Higher wage industries (average annual wage above \$38,500 in the year 2004) include professional and business services, financial activities, information, wholesale trade, and government (federal, state, local) middle wage industries (average annual wage ranging from \$32,000 to \$38,500 in the year 2004) include education and health, natural resources/mining/construction, transportation/warehousing/utilities, and other services. Lower wage industries (average annual wage below \$20,000 in the year 2004) include retail, leisure, and hospitality. Both full- and part-time employment is included.

2.C.7 Voter Registration (Percent of Adults, Age 18 and Older, Registered To Vote)

In both Leon County and Florida, voter registration has generally been higher in presidential election years than in gubernatorial election years. Voter registration state and countywide peaked in the 2004 presidential election year. Overall, voter registration levels have been consistently higher in Leon County compared to the state.

Table 46: Voter Registration (1990-2004)

Election year	1990	1992*	1994	1996*	1998	2000*	2002	2004*
Leon County	67%	75%	67%	81%	72%	78%	75%	84%
Florida	60%	63%	61%	72%	70%	71%	72%	76%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.7.1 Voter Turnout (Percentage of Registered Voters Who Voted In General Elections)

Generally, Leon County's voter numbers has been highest in presidential elections and lowest in municipal elections. Leon County's voter turnout in the 2004

presidential election was the highest turnout in a presidential election since 1992.

Table 47: Voter Turnout (1990-2004)

Election year	1990	1992*	1993	1994	1995	1996*	1997	1998	2000*	2001	2002	2003	2004*
Presidential													
Leon County		83%				66%			71%				80%
Florida		83%				67%			70%				74%
Gubernatorial													
Leon County	66%			75%				56%			65%		
Florida	60%	25%		66%				50%			55%		
Tallahassee**	29%		27%	31%		16%	24%	23%	31%			34%	

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.7.2 Public Perception of Growth ¹⁶

A slim majority of Tallahassee residents have rated development over the past several years as “A” or “B.” Ratings of “A” and “B” increased to 61% in the year 2002, and then dropped to former levels (55%) in the year 2003.

Table 48: Public Perception of Growth (1999-2003)

	1999	2000	2001	2002	2003
Percent rating development as "A" or "B."	55%	55%	54%	61%	55%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

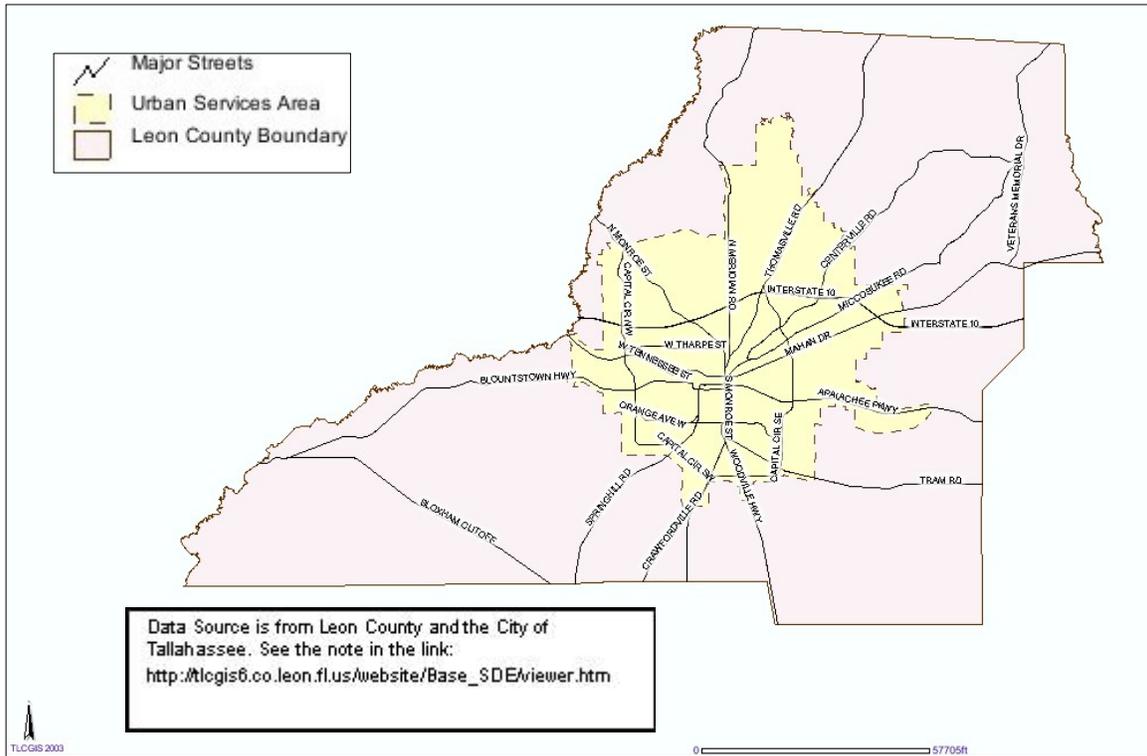
2.C.7.3 The Percentage of New Construction Permitted In Tallahassee-Leon County That Was Located Inside the Urban Service Area

The vast majority of new commercial and residential development in the City of Tallahassee - Leon County has occurred within the urban service area (USA). According to the Tallahassee - Leon County 2010 comprehensive plan, 90% of new residential growth is planned to occur inside the urban service area through the year 2020. In three of the last four years, residential development inside the USA has averaged nearly 89% while commercial development has exceeded 90% inside the USA for all four years reported. ¹⁷

¹⁶ Percent of Tallahassee residents who rated development in Tallahassee over the past several years as “a” or “b,” on an a-f scale.

¹⁷ The Urban Service Area is a compact area surrounding Tallahassee in which urban infrastructure [e.g., sewer, water, roads, mass transit, solid waste, drainage, parks] is presently available or expected to be furnished within the planning horizon of Tallahassee - Leon County currently the year 2020. It consists of those areas that should be allowed to develop to urban levels of intensity either presently or over the period through 2020. For more details, see Tallahassee-Leon County 2010 Comprehensive Plan, <http://talgov.com/planning/>.

Figure 5: Urban Service Area in Leon County



2.C.7.4 Substandard Living Conditions¹⁸

The percentage of occupied housing units in Leon County in the year 2005 with below standard living conditions was similar to the state as a whole. The percentage of housing units that lacked complete kitchen facilities was estimated to be close to zero percent while less than one percent of occupied housing units in Leon County did not have complete plumbing facilities.

Table 49: Substandard Living Conditions in the Year 2005

	Leon County	Florida
Lack complete kitchen facilities	0.0%	0.4%
Lack complete plumbing facilities	0.6%	0.5%
No telephone service	9.1%	6.0%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.7.5 Use of Public Transportation (Number of Passenger Trips on Star Metro (Formerly Taltran))

Use of public transportation- as measured by the total number of passenger trips- increased 28% from 1995 to 2005, slightly more than the growth in Leon County’s population during that time-period (23%) After a plateau from 1999 to

¹⁸ Percentage of occupied housing units that lacked (1) complete kitchen facilities, (2) complete plumbing facilities, (3) telephone service.

2001, use of public transportation has increased for four straight years (2002-2005), increasing by an average of 3.1% a year.

Table 50: Use of Public Transportation (1997-2005)

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Number of passenger trips	3,822,254	3,927,799	4,037,874	3,922,113	3,943,482	4,199,667	4,372,762	4,459,371	4,608,224

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.7.6 Transportation to Work (Percent of Workers Age 16 and Older Who Used Various Means of Transportation to Get To Work)

Table 51: Transportation to Work in the Year 2005

	Leon County	Florida
Drove alone	83.0%	80.0%
Carpooled	10.1%	11.1%
Walked	1.6%	1.6%
Worked at home	2.1%	3.6%
Public Transportation	1.8%	1.8%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

Over 93% of workers in Leon County depend on the automobile to get to work. The percentage of workers in Tallahassee who walked to work and those who used public transportation work was the same as the state. A higher percentage of workers in Leon County worked at home compared with the state average.

2.C.7.7 Travel Time to Work (Percent of Workers Living In Leon Travel Time To Work)

From 1990 to 2000, there was an increase in the percentage of Leon County workers with commute times over 20 minutes. The increases were particularly notable for commute times of 30-44 and 45 or more minutes.

Table 52: Leon County Minutes to Work in the Year 1990 And 2000

	<5	5-9	10-14	15-19	20-29	30-44	45+
1990	3%	12%	19%	23%	24%	15%	4%
2000	2%	10%	16%	21%	25%	19%	7%
Difference*	-1%	-2%	-3%	-2%	1%	4%	3%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.7.8 Parks and Recreation Areas¹⁹

As of 2005, Leon County residents had access to 112,544 acres of parks and recreation areas maintained by city, county, state and federal government. The number of acres per capita has remained about the same over the past few years.

¹⁹ Acres per capita of parks and recreation areas in Leon County

Table 53: Parks and Recreation Areas (2002-2005)

Areas maintained by:	2002	2003	2005
City of Tallahassee*	3,950	3,575	3,403
Leon County*	2,185	2,286	2,477
State of Florida*	3,303	2,956	2,925
Federal (Apalachicola National Forest)*	103,739	103,739	103,739
TOTAL*	113,177	112,556	112,544
Acres per capita	0.46	0.44	0.42

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

Parks and recreation areas include national forest, public parks, gardens, greenways, picnic facilities, campgrounds, boat landings, ball fields, tennis courts, basketball courts, multi-purpose fields, historical and archeological sites and wildlife management areas.

2.C.7.9 Traffic Congestion (Number of Vehicle Miles Traveled Per Resident and Number of Vehicle Miles Traveled Per Centerline Mile of Public Roads)

Since 1999, miles of travel per resident and per centerline mile of public road have steadily increased in Leon County and in Florida. This trend indicates that people on average are traveling more and that this demand is increasingly exceeding the capacity of our public roads.

2.C.8 Environment

2.C.8.1 Conservation of Natural Areas²⁰

In the year 2005, Leon County had 131,700 acres of land considered to have high conservation value (Potential Natural Areas) because they were in the best condition to sustain rare and disappearing plant and animal species. Of these acres, 44% were on conservation lands under private or public (federal, state, local) ownership. Conservation lands boundaries are updated frequently. However, Potential Natural Area (PNA) boundaries are updated every 3-5 years, therefore recent fluctuations in the PNA acreage could be due to GIS calculation differences.

Table 54: Land with High Conservation Value in Leon County (2002-2005)

	2002	2003	2004	2005
Total acres*	136,080	131,751	131,400	131,700
Percent on conservation lands	28%	44%	44%	44%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

²⁰ Acres of land in Leon County with high conservation value that are being conserved under public or private ownership

2.C.8.2 Water Consumption (Gallons of Water Consumed Per Day per Resident Served By Public Suppliers, Such As City and County Water Departments)

Per capita water consumption in Leon County has increased since 1995 and in the Year 2000 exceeded the state average. In addition, total freshwater use in Leon County grew 18% from 1995 to 2000 while the population grew 10%. Groundwater is the county’s primary water source. Public supply – to residences, schools and businesses –is the primary use. Agriculture, industry, power generation and recreation comprise a relatively small percentage of total water use in Leon County.

Table 55: Public Supplied Water Consumption (1990-2000)

	1990	1995	2000
Leon County - per capita - gallons per day	160	154	179
Florida - per capita - gallons per day	171	170	174
Total groundwater used for public supply, agriculture, recreation, and other purposes			
Leon County -millions of gallons per day*	38.48	38.55	45.36

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.8.3 Electricity Consumption (Number of Kilowatt Hours of Electricity Consumed Per Household Served By the City Of Tallahassee)

Total consumption of electricity has increased from 1996 to 2005, but the stable consumption per account suggests that the rate of increase has kept pace with population growth. As of 2005, commercial customers consumed the majority (60%) of electricity provided by the City of Tallahassee. Residential households consumed the remaining 40%.

2.C.8.4 Recycling (Percent of Municipal Solid Waste Collected That Was Recycled)

In the year 2003, 40% of solid waste collected in Leon County was recycled, a considerably higher rate than the state as a whole for that year. Recycling efforts in Leon County peaked in the year 2001 and 2003 and followed similar levels in the year 1999, 2000 and 2002.

Table 56: Recycling (1999-2003)

	1999	2000	2001	2002	2003
Leon County	29%	28%	40%	28%	40%
Florida	24%	26%	27%	28%	27%

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

2.C.8.5 Air Quality ²¹

Air quality is measured by the number of days with ozone and particle pollution Leon County has very clean air, compared to many other counties in Florida

²¹ Air quality levels ranges from one to three. (1) unhealthy for sensitive populations (orange), (2) unhealthy (red), (3) very unhealthy (purple)

and the nation. In the year 2006, Leon was one of the fourteen counties in Florida (among 31 with reported data) that had zero days indicating hazardous air quality for the population, including sensitive populations. (People with asthma, emphysema, cardiovascular disease or similar conditions that make them especially vulnerable to air pollution)

Table 57: Air Quality (2003-2006)

	2003	2004	2005	2006
Ozone				
Orange days	2	0	0	0
Red days	0	0	0	0
Purple days	0	0	0	0
Grade	B	A	A	A
Particle pollution				
Orange days	Not available	0	0	1
Red days	Not available	0	0	0
Purple days	Not available	0	0	0
Grade	Not available	A	A	B

QOL Report, 2006, the 21st Century Council, Inc., Tallahassee, Florida

Letter grades (A through F) are based on the levels of ozone and particle pollutants and the number of days in each category (orange, red, purple).

2.D Other Merits of Tallahassee

Beyond thriving economic growth, the area is rich in history, culture, and nature. These include museums and art galleries, to Tallahassee sponsored events including theatres, ballets, orchestras, and the highly celebrated Springtime Tallahassee Festival, among others. The mild Tallahassee climate is the perfect setting for nature lovers to enjoy famous canopy roads, biking on the St. Marks Trail, camping in the Apalachicola National Forest or strolling through the beautiful Maclay State Gardens. The nearby Florida Caverns State Parks, Wakulla Springs, St. Marks Wildlife Refuge and Lighthouse, or the Gulf of Mexico is just a short drive away.

2.D.1 Tallahassee Ranks among US Cities

The Places Rated Almanac book indicated that Tallahassee is one of the best ten cities in the US to raise a child in. This almanac serves as a comprehensive comparison guide that rank cities based on some usual and many unusual measures as the cost of doing business index, the 32nd best place to live, the top city to raise a child, the top colleges, top city for doing business, top city for QOL and logistics, and gone fishing. (David Savageau, 2007) ²²

²² Some links that includes ranking are:
City data, <http://www.city-data.com/forum/florida/57987-top-10-reasons-do-business-florida.html>

2.D.2 FSU-Related Start-Ups and Spin-Offs to the Local Tallahassee

CEFA has studied the contribution of FSU-related start-ups and spin-offs to the local Tallahassee/ Leon County economy. Using an average profile of the firms surveyed, these firms were mostly to be in emerging, growing or maturing stage of development. No firms in the survey appeared to be declining, although one had gone out of business. The majority of the firms was actively involved in research, development, and innovation, with new product development in the last five years or projected product development over the next two years. Some major results of this study were:

- Majority of the firms plan to expand in the next 3 years.
- Majority of their markets are located out of the region.
- Firms expressed no workforce problems, and were satisfied with local utilities, streets and roads, highways, airlines, air cargo, trucking, property tax assessment, zoning changes and building permits and regulatory enforcement.
- Firms were highly satisfied with services. (police, fire, ambulance and health care)
- Primary differences in satisfaction occurred among childcare, local schools (K-12), and public transportation categories.

3. The New Economy Trend

FSU CEFA conducted a study in the year 2003 comparing the Florida Metropolitan Statistical Areas with the national MSA new economies using the Metropolitan New Economy Index (NEI). An index using 16 indicators categorized in 5 parts (knowledge, globalization, economic, dynamism and competition, transformation to a digital economy, and technological innovation capacity) was computed. Tallahassee got a score of 47.7 and ranked 11th in the national level among 66 MSAs. (Lynch and Harrington, 2003) Regarding Tallahassee, its rank (of the individual 16 indicators among the 20 Florida MSAs) was as follows:

1. Managerial, professional and technical jobs; (2)

The percent of jobs held by managers, professionals, and engineering technicians in Tallahassee was 39% in the year 2000. This percent exceeded the US top MSA average of 37% in the same year.

2. Workforce education; (2)

This variable is a weighted measure of educational attainment (advanced degrees, bachelor's degrees, or some college course work) of the work force. The composite score for Tallahassee was 0.75, with Gainesville ranking 1st. This score is much higher than the US MSA average of 0.58.

3. Export focus of manufacturing; (18)

4. "Gazelles" – fast growing entrepreneurial companies; (5)

5. Job churning (creation and destruction of jobs at a point in time); (17)

6. New publicly traded companies; (11)

7. Online population; (2)

This variable is measured by the percentage of adults with Internet access at work or at home. Tallahassee MSA rank was 2nd, with 49.6% of adults had access to the Internet at work or at home in 1999 – 5% higher than the US MSA average.

8. Broadband telecommunications capacity; (17)

9. Computer use in schools; (1)

Measured by the percentage of children using computers in the classroom, the computer use in schools in Tallahassee was 63% in 1998.

10. Commercial internet domain names; (4)

11. Internet backbone; (1)

Internet backbone is measured by total capacity of all internet backbone links to other metropolitan areas as share of employment. The Tallahassee MSA ranked 2nd in internet backbone, among the 66 MSAs evaluated in the year 2000. High-tech jobs; (8)

12. Degrees granted in science and engineering; (2)

Tallahassee ranked 2nd with a score of 12.14 in 1998, compared to the US average of 10.02, in the same year.

13. Patents; (17)

14. Academic research and development funding; (2)

It is a combined measure of industry investment in R&D at academic institutions and total academic R&D. In the year 1997, Tallahassee ranked 2nd, with a

weighted score of 10.79 in the year 2000. Florida's average was 10 in the same year.

15. Venture capital; (13)

4. Investment Incentives

4.A Introduction

The business climates, or, alternatively, investment incentives, make the US a leader in the list of world countries. Walter H. Diamond (2006) states in the introduction of his book about investment incentives on the state level:

"In today's world of globalization, the United States generally is considered by foreign investors around the world to be the safest and most profitable location to invest their funds and from where to operate a headquarters or manufacturing site. After more than a decade of prosperity and a strong currency coupled with the traditional political stability, The United States has emerged as a net importer of capital for the first time in post World War II history. Increasing profit margins for multinationals, relatively low interest rates, incredible stock exchange prices and volume, a reduced level of inflation and record consumer spending resulting from sophisticated demands of the baby boomer age, as well as an accelerated rate of immigrant arrivals, all have inspired new private investment from abroad, now surpassing the \$5 trillion mark in direct and indirect investment. "(Diamond, 2006)

This implies that the incentives made available for business investors are attractive to both foreign investors and the US. However, these countrywide incentives vary by states, counties and cities in the US. The following describes the primary incentives:

- **Direct Incentives:** These include the direct policies set up by authorities in a given city or region for the purpose of not only encouraging investment, but also affecting the type of investment.
- **Indirect Incentives:** The size of the economy, the availability of resources, the leading economic indicators as a standard of living; unemployment; and educational attainment, the potentials for future growth and expansion, weather and climate, safety, and the needs of local economy.

The QOL **is the indirect incentive** that could affect the decision of the investors to choose Tallahassee as their target investment place. The question is whether these indirect incentives are tapped and utilized effectively in order to influence the investors' location preferences.

In today's business world with the substantial developments in communication, businesspersons do search for QOL measures. Therefore, it is

beneficial to have the QOL information readily accessible to new and expanding businesses.

An investor asked to choose between an investment of 50% return in a high crime potential area, and 20% in a very peaceful area would most probably choose the low return area if he/she acts *rationally*. This means that if economic development council is targeting some type of business that could not locate in the city because of, say, crime, it should undertake the some procedures and policies to control for the deterring factor for the entry of the business. Tax incentives are important factors that affect the decision of businesses to expand or relocate. However, QOL factors, such as low crime rate, are of equal importance.

4.B Investment Climate in Florida ²³

4.B.1 State-Wide Merits of Florida

A set of agreed-on factors contributes to the relatively competitive position for the state of Florida among the US states with regard to attracting investment. Literature usually mentions them as *ten reasons to expand or locate business in Florida*. (City-data.com; 2006) They are:

4.B.1.1 Leadership

Florida has a **robust base of technology-** driven businesses, with 19,838 high-tech companies employing 265,484 high-tech/high-skill workers in the year 2005, plus a significant and growing presence in many new economy sectors.

4.B.1.2 Global Gateway

Florida is the **strategic and economic center of the Americas**. Geographic location, economic influence and political stability combine to make Florida the center of trade and finance throughout the Western Hemisphere. Florida's international trade grew to \$95.3 billion in the year 2005. This growth is due in part, to a multicultural, multilingual workforce that is skilled in facilitating international commerce.

4.B.1.3 Entrepreneurial Environment

The entrepreneurial spirit is alive and thriving in Florida. Home to the Disney/SBA National Entrepreneur Center, Florida hosts a variety of tech incubators, accelerators and university- based research hubs that make it **possible for**

²³ The information in this section is extracted from the following link: <http://www.clearspringsco.com/why-florida.htm>.

business and academia to collaborate for bringing new discoveries to market. In addition, Florida ranks high in new business formation and small business survival, indicators of a policy environment that values entrepreneurship.

4.B.1.4 World Connectivity

Florida's connections to the world run deep, both literally and figuratively. Florida has **one of the world's most extensive multimode transportation systems**, with 20 major airports, 14 deepwater shipping ports, extensive highway and rail networks and Kennedy Space Center's unique Spaceport. Moreover, with multiple hubs that allow for high-speed data, voice and video transmission from around the U.S. to Europe, Latin America, Asia and Africa, Florida is truly "wired for success."

4.B.1.5 Business Climate

Florida demonstrates its **commitment to business with incentives for job creation**, investment and training as well as for locating in rural and urban sites, Enterprise Zones and brown fields. The state also provides expedited permitting services and assistance in accessing enterprise bonds, micro-loans and venture capital.

4.B.1.6 Workforce Talent

As the **fourth most populous state, Florida offers a diverse, skilled and available workforce.** Florida's universities and community colleges annually send out into the workforce several thousand high quality graduates who are eager to make a difference. State-sponsored workforce training programs make skills training for the demands of new economy jobs readily available to new and experienced workers.

4.B.1.7 Business-Friendly Government

Florida's state and local governments have made **many of the most vital business functions easily accessible online.** A pro-business, pro-technology agenda assured; the government is committed to continuing communication between legislators and key business sector associations, including Florida Aviation Aerospace Alliance, BioFlorida, Florida Defense Alliance, ITFlorida, Florida Space Authority and many others.

4.B.1.8 QOL

A spectacular climate and 300-plus days of sunshine each year, combined with outstanding cultural amenities and economic opportunity, have helped Florida

repeatedly earn top rankings in Harris Poll's "most desirable places to live." (Taylor, 1999) Already the world's number one travel destination, Florida is the natural choice for permanent residence among its many visitors who "play here, then stay here."

4.B.1.9 Visionary Development

More than any other state, Florida's economic development goals and initiatives have been developed and embraced as part of a statewide vision. Economic development organizations regularly combine forces to help existing and prospective businesses find the right location(s) to match their needs.

4.B.1.10 Growth Economy

While some regions struggle simply to maintain the status quo, Florida's economic engine surges forward. The longtime leader among all states in job creation, Florida boasts the **fourth largest gross state product in the nation** in the year 2005.

4.B.2 Enterprise Florida ²⁴

This non-negligible site includes detailed information regarding the advantages of Florida for setting up and growing business. The growing consumer market, along with an expanding pool of talent and a supportive government, in addition to a strong asset base, Florida assures long-term success for companies. The energy in Florida is blatant, and it shows up in nearly every measure and indicator.

"So, in an era when businesses must remain innovative to succeed, locate where innovation thrives - Florida. Innovation Hub of the Americas, Florida businesses continue to blossom through the support of strong research & development efforts and technology transfer. Florida Government, industry and academia have converged to create partnerships that will continue to advance Florida's technology leadership and workforce talent. Whether your organization needs to move products, services or data, doing business in Florida provides ready worldwide connectivity. "(eflora.com)

Florida is famous as the global gateway for international commerce. Florida also offers an environment conducive to the entrepreneurial spirit. Numerous venture capital firms, angel investors, technology incubators, research parks and strong university research programs help fuel business development and expansion.

Florida businesses enjoy a stable tax structure, exceptional incentives and efficient state & local governments. The most rigorous test of the strength of the state's leadership, however, comes during emergencies. Florida has proven that it is

²⁴ See eflora.com for more details about enterprise Florida.

prepared to assist businesses and residents with some of the most effective disaster prevention & response programs in the world. Lastly, the people of Florida benefit from no state personal income tax, a strong educational system, affordable housing and an enviable QOL.

4.B.3 An Important Issue: Disaster Preparedness

Since 2004, Florida's population has increased significantly, leading to record numbers of jobs created or retained, and unemployment **has dropped, despite two active hurricane seasons. This economic prosperity is a testament to the state's economic resilience and disaster preparedness.** Florida's disaster response programs serve as a model for the nation. The rapid recovery of Florida post-hurricanes economy is evidence of the state's effective and efficient disaster management plans and implementation processes. Florida did not experience hurricane activity in the year 2005, but it continues to improve its preparedness status and processes. The state is taking specific steps to instill a "culture of preparedness" and some of its pioneering programs have drawn national and international attention.

4.B.3.1 Hazard Mitigation

Florida incorporated hazard mitigation practices, such as the acquisition of flood-prone properties and hurricane shutters for critical facilities, into decision-making practices for both the public and private sectors. It implemented a "Digital Disaster Preparedness" program to protect and preserve e-mail traffic of small businesses in the event of disaster-related interruption. In addition, the state expanded its My Safe Florida Home (MSFH) program, which offers eligible Floridians free wind inspections and matching grants for improvements such as hurricane shutters, reinforced garage doors, and roof enhancements. More than 5,100 residents are already participating in the program. The governor signed into law an annual sales tax break for hurricane preparedness items.

4.B.3.2 Insurance

The state-backed Citizens Property Insurance Corporation was authorized to issue commercial property insurance coverage, specifically wind coverage, for small businesses across the state, not only in high-risk areas. **Legislation was passed to freeze rates of the Citizens Property Insurance Corporation until 2008,** lower the qualifying threshold by 10% to make insurance more affordable and impose

other restriction on nationwide insurance companies to prevent them from drastically increasing rates.

4.B.3.3 Response

Florida forms a State Emergency Response Team comprised of “first responders” for business recovery who open business assistance centers, organize business recovery workshops and activate the Florida Small Business Bridge Loan Program, when appropriate. The Florida Small Business Emergency Bridge Loan Program, which was the first such program in the United States and has been a model for other states to follow, provides expedient funds to businesses ready to begin repairs and replace destroyed inventory. Emergency management organizations and utilities continue to conduct elaborate emergency simulations and disaster-response training sessions to ensure that skills of emergency personnel remain top-notch. Florida rebuilds Construction Industry Training Initiative provides training and funding for workers of all skill levels to meet the ongoing demands of a healthy economy and hurricane recovery.²⁵

4.B.3.4 Tax System Competitiveness in Florida²⁶

The tax system is another comparative advantage Florida has relative to other US states. The Georgia Budget and Policy Institute has shown that Florida’s state and local taxes, as a percent of personal income, place Florida right in the middle of the other US states. The ratio was 9.23% in the year 2002. In addition, Florida dominates two neighboring states in the competitiveness of this important factor, as appears from the table below.²⁷

Table 58: State and Local Taxes as a Percent of Personal Income, 2002

State	Rate	State	Rate	State	Rate	State	Rate
West Virginia	10.86%	Mississippi	10.25%	Oklahoma	9.73%	Virginia	9.36%
Louisiana	10.87%	Maryland	10.18%	Missouri	9.50%	Florida	9.23%
Kentucky	10.50%	North Carolina	9.89%	Texas	9.47%	Alabama	8.60%
Arkansas	10.28%	Georgia	9.84%	South Carolina	9.45%	Tennessee	8.25%

Source: <http://gbpi.org/pubs/garevenue/20041207.pdf>

This percentage increased to 9.44% in the year 2003. Florida descending rank among the US states was 44th.

²⁵ Per eflorida.com; these innovative and effective initiatives are only a few examples of Florida’s ongoing commitment to preparedness for residents, businesses, and the overall state economy. To learn more about other Florida preparedness programs and information, see <http://www.eflorida.com/ContentSubpage.aspx?id=1912>.

²⁶ Many of this subsection information have been directly obtained from the tax foundation. Best known for its annual calculation of Tax Freedom Day, the Tax Foundation is a nonpartisan, nonprofit organization that has monitored fiscal policy at the federal, state and local levels since 1937. See the web taxfoundation.org for more information about the tax issues in the US.

²⁷ Georgia Budget and Policy Institute website, gbpi.org, includes detailed and valuable information about the tax system in Georgia and its neighbors.

Table 59: State and Local Taxes (% of Personal Income), 2003

1. Maine 12.89%	18. California 10.67%	35. Alaska 9.86%
2. New York 12.89%	19. Kansas 10.65%	36. Nevada 9.86%
3. Wyoming 12.78%	20. New Mexico 10.59%	37. Montana 9.72%
4. Hawaii 11.82%	21. Michigan 10.58%	38. Georgia 9.69%
5. Wisconsin 11.75%	22. Mississippi 10.57%	39. Oklahoma 9.68%
6. Nebraska 11.56%	23. Utah 10.55%	40. South Carolina 9.66%
7. Rhode Island 11.48%	24. Pennsylvania 10.35%	41. Texas 9.61%
8. Minnesota 11.33%	25. Iowa 10.34%	42. Oregon 9.56%
9. Ohio 11.26%	26. Arizona 10.25%	43. Missouri 9.48%
10. Vermont 11.09%	27. Maryland 10.21%	44. Florida 9.44%
11. Louisiana 11.04%	28. Illinois 10.19%	45. Virginia 9.40%
12. West Virginia 10.89%	29. Massachusetts 10.09%	46. South Dakota 9.39%
13. New Jersey 10.88%	30. Arkansas 10.07%	47. Colorado 9.04%
14. North Dakota 10.83%	31. Washington 10.07%	48. Tennessee 8.91%
15. Indiana 10.76%	32. Delaware 10.04%	49. Alabama 8.58%
16. Kentucky 10.75%	33. North Carolina 10.01%	50. New Hampshire 8.45%
17. Connecticut 10.69%	34. Idaho 9.87%	

Source: <http://www.propertytaxreform.state.fl.us/docs/Meeting092006/Competitiveness%20of%20Florida%E2%80%99s%20Tax%20Structure.pdf>

The state and local tax per capita is slightly more competitive. In the fiscal year 2003, this number was 2,784.36 compared to an overall average of the US, of 3,220.94. With this number, Florida's rank is 32 among the 50 US states.

Table 60: State and Local Tax per Capita, 2003

1. New York \$4,581.71	18. Delaware 3,260.72	35. Kentucky 2,736.19
2. Connecticut 4,569.16	19. Alaska 3,212.97	36. Oregon 2,728.34
3. New Jersey 4,285.47	20. Pennsylvania 3,190.86	37. Arizona 2,706.38
4. Wyoming 3,948.67	21. Michigan 3,181.04	38. Missouri 2,691.89
5. Massachusetts 3,928.22	22. Virginia 3,089.93	39. Utah 2,626.97
6. Minnesota 3,760.30	23. Colorado 3,084.47	40. New Mexico 2,619.45
7. Maryland 3,717.63	24. Kansas 3,075.86	41. West Virginia 2,611.92
8. Maine 3,614.36	25. Nevada 3,026.16	42. South Dakota 2,501.31
9. Rhode Island 3,562.94	26. Indiana \$3,003.89	43. Oklahoma 2,497.36
10. Wisconsin 3,522.14	27. Iowa 2,886.50	44. Idaho 2,496.39
11. Hawaii 3,502.38	28. New Hampshire 2,881.82	45. South Carolina 2,460.00
12. California 3,501.81	29. North Dakota 2,868.02	46. Tennessee 2,458.65
13. Nebraska 3,338.07	30. Georgia 2,798.46	47. Montana 2,405.88
14. Illinois 3,336.25	31. Louisiana 2,793.56	48. Mississippi 2,371.47
15. Washington 3,292.64	32. Florida 2,784.36	49. Arkansas 2,363.40
16. Vermont 3,282.22	33. North Carolina 2,779.70	50. Alabama 2,176.52
17. Ohio 3,277.60	34. Texas 2,756.51	

Source: <http://www.propertytaxreform.state.fl.us/docs/Meeting092006/Competitiveness%20of%20Florida%E2%80%99s%20Tax%20Structure.pdf>

Another study has showed that the Florida tax system is friendly (Dubay and Atkins, 2006). The study showed which States have business-friendly tax codes, and which do not. The ten states with the most business-friendly tax systems in the year 2006 were Wyoming, South Dakota, Alaska, Florida, Nevada, New Hampshire, Texas, Delaware, Montana and Oregon. These rankings come from the third edition of the Tax Foundation's *State Business Tax Climate Index*, by Foundation economist Curtis S. Dubay and Scott A. Hodge, President of the Tax Foundation. The study ranks the 50 states on how "business friendly" their tax systems are, providing a roadmap for state lawmakers concerned with keeping their states tax-competitive.

“Every one of the best tax systems raises sufficient revenue without imposing at least one of the three major state taxes—sales taxes, personal income taxes and corporate income taxes,” said Dubay.

The ten states with the least hospitable business tax climates are New York, New Jersey, Rhode Island, Ohio, Vermont, Maine, Kentucky, Nebraska, Iowa and Arkansas. “States do not enact tax changes in a vacuum,” said Hodge. “Every tax change will affect a state’s competitive position relative to its neighbors, as well as globally.” The goal of the index is to focus lawmakers on good tax fundamentals in their states, rather than short-term tax abatements and exemptions designed to lure high-profile companies temporarily, baseball teams, and auto plants from other states. “The temptation is for state lawmakers to lure high-profile companies with packages of tax bonuses,” said Hodge, “but that strategy can backfire.”

For example, in the year 2000, officials in Columbus, Ohio, lured a moving company with a 5-year package of tax goodies. In the year 2004, the company had not only failed to add 100 jobs as promised, but it had actually fired 98 employees, sending lawmakers into a panic to yank the final year of tax breaks. “Ohio’s experience shows preferential tax bonuses don’t guarantee that jobs will stay permanently,” said Hodge. “Often they mask deeper flaws in state taxes. The Tax Foundation’s new State Business Tax Climate Index helps draw those to lawmakers’ attention.”

Even states with excellent business tax climates offer extra tax incentives. In the year 1996, Florida lawmakers attracted a major credit card company to open a call center with a generous \$4 million tax refund package. Eight years later lawmakers were shocked at the announcement that the company was closing the Tampa call center and laying off 1,100 workers. Generally, the index rewards neutral tax codes; that is, there are have low, flat tax rates that apply to everyone. This makes tax law simpler and more transparent and avoids double taxation. The worst state tax codes tend to have:

- Complex, multi-rate corporate and individual income taxes;
- above-average sales tax rates that do not exempt business-to-business purchases;
- complex, high-rate unemployment tax systems; and
- High effective property tax rates, as well as a host of other wealth-based taxes.

Table 61: Major Components of the State Business Tax Climate Index, 2006

State	Overall Rank	Business Tax Index Rank	Individual Income Tax Index Rank	Sales and Gross Receipts Tax Index Rank	Unemployment Insurance Tax Index Rank	Wealth and Property Tax Index Rank
Alabama	14	14	17	11	4	6
Alaska	3	48	4	1	43	18
Arizona	25	29	20	40	12	12
Arkansas	41	44	32	37	41	13
California	40	39	47	38	20	7
Colorado	12	6	14	26	21	14
Connecticut	39	16	19	33	26	50
Delaware	8	25	26	3	11	10
Florida	4	13	4	20	1	16
Georgia	21	8	27	7	32	27
Hawaii	33	26	44	43	22	3
Idaho	24	21	37	17	46	2
Illinois	23	15	13	41	37	44
Indiana	11	20	10	14	7	19
Iowa	42	46	45	13	28	29
Kansas	34	45	23	28	15	33
Kentucky	44	40	30	23	48	30
Louisiana	36	34	22	49	9	28
Maine	45	47	38	10	42	39
Maryland	22	7	39	8	17	37
Massachusetts	27	36	15	9	49	41
Michigan	26	49	11	32	40	20
Minnesota	38	41	36	34	35	15
Mississippi	29	33	16	46	2	26
Missouri	20	4	25	29	8	17
Montana	9	17	21	5	24	23
Nebraska	43	42	34	36	14	42
Nevada	5	1	7	47	38	11
New Hampshire	6	38	8	2	44	31
New Jersey	49	50	46	27	27	46
New Mexico	28	31	24	48	18	1
New York	50	30	50	39	47	43
North Carolina	37	22	43	35	5	40
North Dakota	31	35	42	18	36	4
Ohio	47	37	48	45	13	48
Oklahoma	17	8	28	15	3	21
Oregon	10	24	33	4	30	8
Pennsylvania	16	32	12	19	16	45
Rhode Island	48	27	40	30	50	49
South Carolina	30	12	29	12	45	32
South Dakota	2	1	1	42	31	9
Tennessee	15	11	9	44	33	38
Texas	7	18	4	21	6	34
Utah	18	5	31	24	23	5
Vermont	46	43	49	16	10	47
Virginia	19	8	18	6	25	36
Washington	13	19	2	50	39	24
West Virginia	35	28	41	31	34	22
Wisconsin	32	23	35	25	29	25
Wyoming	1	1	2	22	19	35

Note: Rankings do not average across to total. States without a given tax rank equally as number 1.
Source: " <http://www.taxfoundation.org/press/show/1369.html>".

“The ideal tax system, whether at the state, federal, or international level, should be neutral to business activity,” said Dubay. “In such a system, people would base their economic decisions on the merits of the transactions rather than the tax implications.”

The methodology of the State Business Tax Climate Index focuses on the idea of tax competition, and each state’s final score depends on a comparison with the other 49 states. The overall index is composed of five specific indexes devoted to major features of a state’s tax system: the state’s principal business tax (usually the corporate income tax); the individual income tax; the sales or gross receipts tax; the unemployment insurance tax, and the state’s system for taxing assets (principally the property tax). These five component indexes are themselves composed of several sub-indexes, there are 123 variables accounting for each state’s tax system.

By assessing each state’s laws and tax collections as of the beginning of 2006 fiscal year (July 1, 2005), the rankings reflect the business tax climate at that time, and were not considered legislative action since then. While the index is comprehensive, it is not exhaustive. Future research into state taxation will lead to new variables and sub-indexes in future editions of the index.

4.B.4 Sales and Use Tax and “Doing Business in Florida”

Availability of information is an important factor for businesses in the planning and decision-making process involving business site selection or relocation. The Economic Development Council of Tallahassee/Leon County has comprehensive information about the incentives available for investment in Tallahassee. Florida Department of Revenue (FDOR) has made available online (<https://taxlaw.state.fl.us/>) comprehensive information about the tax system in Florida.

For businesses, the FDOR had published a small file about sales and use tax for business owners. (<http://dor.myflorida.com/dor/forms/2005/gt300015.pdf>)

The FDOR has a link online entitled “Doing Business in Florida”. This link includes detailed information about tax, exemption for non-profit businesses, business owner’s guide, tax incentives, new hire reporting and free tax seminars. In addition, the FDOR published reference material for businesses available either online using Florida Tax Law Library. Alternatively, brochures are available at local FDOR service centers (<http://dor.myflorida.com/dor/taxes/servicecenters.html>).

4.C Economic Development Council (EDC) of Tallahassee/ Leon County

The EDC makes available many incentives for businesses and investors to locate or expand in Tallahassee. It is very important to refer to the EDC website for investors to gain insight into the investment climate in Tallahassee.²⁸ Discussed below are the incentives available to investors in Tallahassee.

In addition to State incentives available to investors, there are also local incentives offered. The EDC sponsors a program called the Targeted Business Pilot Program.

4.D Local Incentives: The Targeted Business Pilot Program (TBPP)

4.D.1 The Program

The vision of the EDC in the long term is towards attaining sustainable economic growth. One of the important tools, TBPP, is an initiative offered by the EDC to support business growth. The program supports value-added-jobs-creating businesses regardless whether the businesses are new or existing.

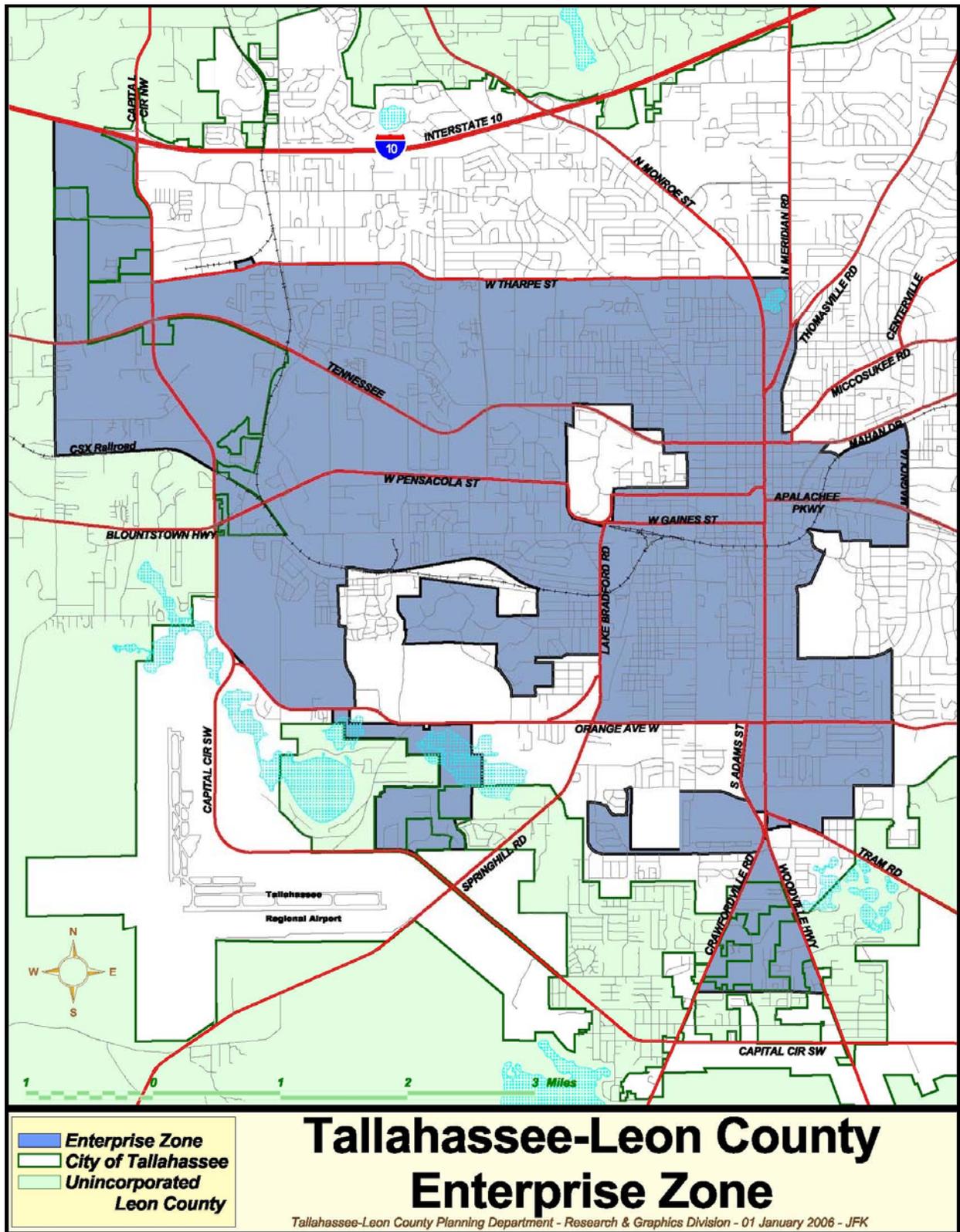
"TBPP rewards businesses that will diversify the economy in Tallahassee and Leon County, and are suited to the City and County's business mix²⁹, and will generate revenue growth from the sales of goods and services outside the local economy. The program also seeks to reward businesses that locate in designated target areas for economic growth and development; that build environmentally sensitive projects; that do business with other local businesses; and that practice good corporate citizenship."³⁰ The funds awarded under this program are used by the EDC to pay back the cost of development fees (up to 100%) and a portion of the capital investment of the business project based on paid ad valorem taxes. The EDC has set a scoring system upon which the amount of funding depends.

²⁸ <http://www.edctallahasseeleon.com/> .

²⁹ These business groups include manufacturing facilities, finance & insurance services, wholesale trade, information industries, professional; scientific & technical services, management services, and administrative & support services. They are specified in Section 4.D.1

³⁰ <http://www.taledc.com/TBPP.php>.

Figure 6: Enterprise Zone



Source: EDC of Tallahassee/Leon County, 2007

4.D.2 Eligibility – New and Existing Businesses

The following table includes the target **industries of Tallahassee** (as **established by the EDC**) for the year 2007. As stated previously, the criteria **used** were the diversification of the economy in Tallahassee and Leon County, and the suitability to the business mix of Leon County **and the City of Tallahassee**.

Table 62: TBPP: Target Industries as Set by the EDC of Tallahassee/ Leon County (2007)

<p>MANUFACTURING FACILITIES</p> <ul style="list-style-type: none"> -Chemical Manufacturing -Pharmaceutical Manufacturing -Plastics & Rubber Products Manufacturing -Computer & Electronic Product Mfg -Computer & Electronic Component Mfg <ul style="list-style-type: none"> <i>Electro medical Apparatus Mfg</i> <i>Irradiation Apparatus Mfg</i> <i>Laser Manufacturing</i> <i>Optoelectronics Manufacturing</i> <i>Reproducing Magnetic & Optical Media Mfg</i> <i>Semiconductor Manufacturing</i> <i>Software Reproducing</i> -Transportation Equipment Manufacturing - Aviation & Aerospace Manufacturing -Machinery Manufacturing <ul style="list-style-type: none"> <i>Electronic Flight Simulator Manufacturing</i> <i>Instruments for Measuring & Testing Elec.</i> <i>Lens Manufacturing</i> <i>Optical Instruments Manufacturing</i> <i>Power Distribution., Generation & Technology</i> -Electrical Equipment Manufacturing <ul style="list-style-type: none"> <i>Appliance Component Manufacturing</i> <i>Fiber Optic Cable Manufacturing</i> -Miscellaneous Manufacturing <ul style="list-style-type: none"> <i>Surgical & Medical Instrument Mfg.</i> -Food & Beverage Products Manufacturing -Textile Mills & Apparel Manufacturing -Wood & Paper Product Manufacturing -Printing & Related Support Activities -Metal Manufacturing -Furniture & Related Products Mfg. <p>FINANCE & INSURANCE SERVICES</p> <ul style="list-style-type: none"> -Nondepository Credit Institutions <ul style="list-style-type: none"> <i>Credit Intermediation & Related Activities</i> -Securities, Commodity Contracts -Insurance Carriers -Funds, Trust & Other Financial Vehicles <p>WHOLESALE TRADE</p> <ul style="list-style-type: none"> -Business-to-Business Electronic Marketing 	<p>INFORMATION INDUSTRIES</p> <ul style="list-style-type: none"> -Sound Recording Industries <ul style="list-style-type: none"> <i>Integrated Record Production/Distribution</i> -Film, Video & Electronic Media <ul style="list-style-type: none"> <i>Production (Excluding temporary "on location" filming)</i> <i>Postproduction Services</i> -Information Services & Data Processing <ul style="list-style-type: none"> <i>Internet Service Providers, Web Search Portals</i> <i>Data Processing Services</i> <i>On-line Information Services</i> -Publishing Industries <ul style="list-style-type: none"> <i>Software Publishing</i> <i>Music Publishing</i> -Telecommunications <ul style="list-style-type: none"> <i>Satellite Communications</i> <p>PROFESSIONAL, SCIENTIFIC & TECHNICAL SERVICES</p> <ul style="list-style-type: none"> -Professional, Scientific & Technical <ul style="list-style-type: none"> <i>Computer Programming/Software Development</i> <i>Computer System Design</i> <i>Management, Scientific & Tech Services</i> <i>Research & Development</i> <i>Scientific & Technical Consulting Services</i> <i>Simulation Training</i> <i>Testing Laboratories</i> -Bio-Medical & Bio-Science <p>MANAGEMENT SERVICES</p> <ul style="list-style-type: none"> -Management Services <ul style="list-style-type: none"> <i>National, International & Regional Headquarters</i> <i>Office of Bank Holding Companies</i> <p>ADMINISTRATIVE & SUPPORT SERVICES</p> <ul style="list-style-type: none"> -Customer Care Centers <ul style="list-style-type: none"> <i>Telephonic & On-line Business Services</i> <i>Customer Support</i> <i>Transaction Processing</i> <i>Technical Support</i> -Credit Bureaus
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Source: EDC of Tallahassee/Leon County, 2007

4.D.3 Incentives / Use of Funds

The following table includes a list of eligible and non-eligible development fees for reimbursement as set by the EDC. (EDC, 2007)

“Granting a reimbursement of up to 100% of an amount equivalent to the City ad valorem taxes paid on land, improvements, and tangible personal property for up to 10 years. As a means to reimburse, a part of the capital investment cost required to relocate or expand a business and reimbursement of the County ad valorem taxes equal to the amount reimbursed by the City. Expansion projects would qualify only for the incremental increase in ad valorem taxes.” (EDC, 2007)

Table 63: TBPP: Development Fees, 2007

List of Eligible City of Tallahassee Development Fees
<ul style="list-style-type: none"> • Building Permits (including electrical, plumbing, roof, foundation, gas/mechanical) • Environmental Permits • Concurrency Review Land Use Review (including Site Plans, Platting and Certificates)
Fees That are Not Eligible
<ul style="list-style-type: none"> • Non-City of Tallahassee permits • Zoning and/or Land Use Changes • Licensing • Appeals • Lost Plans • Mitigation Requirements • Temporary Uses • Variances • Demolition

Source: EDC of Tallahassee/ Leon County

4.D.4 Application Process / Payment Method

The following is the application method as set by the EDC:

1. A business submits a preliminary application to determine eligibility when development/building permits are filed. For projects already under construction, the preliminary application filing should take place prior to the receipt of the first certificate of occupancy for the building.
2. If the EDC approves the preliminary application, a Reimbursement Agreement with the City and County is executed to finalize the inducement and performance requirements.
3. Twelve months after receiving its Certificate of Occupancy, the business can file its first application for reimbursement.
4. Reimbursement of development fees (up to 100%) are paid in lump sum.
5. Annual payments of the funds that are equivalent to the City ad valorem taxes paid (up to 100%). In addition, an equal dollar amount from the County will be

made one year in arrears over a period of time up to ten years (in accordance with the scoring system below) The amount of award is subject to reduction if performance measures are not met.

6. Annual performance reports are submitted to the City of Tallahassee and Leon County.

4.D.5 Scoring System and Award Approval

The EDC has determined a set of requirements for award approval and scoring system:

1. As a screening mechanism, prior to being admitted into the scoring phase of the evaluation process, businesses must provide audited financial statements for the previous two years with their application as evidence that they are a strong, growing company in which the City and County should invest.
2. A business profile score for the application is determined on a rating system that gives points to the following categories (100 points maximum with total points determining percentage and length of inducement)
 - Number of employees - 25 Points
 - Salary levels - 25 Points
 - Amount of capital investment - 15 Points
 - Location in designated target areas - 10 Points
 - Environmental sensitivity of project design/redevelopment achievements - 10 Points
 - Local business promotion - 10 Points
 - Corporate citizenship - 5 Points

Table 64: Inducement Period, 2007

Total Points	Percentage of Inducement	*Length of Inducement (Ad Valorem Taxes Only)
40 to 49 points	50% exemption	5 years
50 to 59 points	60% exemption	6 years
60 to 69 points	70% exemption	7 years
70 to 79 points	80% exemption	8 years
80 to 89 points	90% exemption	9 years
90 to 100 points	100% exemption	10 years

Source: EDC of Tallahassee/ Leon County

*An amount equal to the ad valorem taxes will be paid by city, and matched by the county, to the business over a period of four to ten years. An amount equal to the appropriate development fees will be paid in lump sum.

3. Additionally, the Economic Development Council will prepare an economic impact analysis to determine whether the project shows a return on investment to the community.
4. A committee made up of representatives from City staff and the Economic Development Council, as well as the Treasurer-Clerk and County Administrator, will score the applications and forward its recommendation to the City and County Commissions.
5. The City and County Commissions, respectively, will make a final determination on the award of inducements under this program.
6. The program is a three-year pilot program with annual evaluations. This will provide an opportunity to eliminate the program if it proves ineffective or to modify it to improve results based on experience in the Tallahassee market.
7. **Approximate timeline:** The table below shows the approximate timeline.

Table 65: Approximate Timeline for TBPP, 2007

Preliminary Application	
1. Applicant files Preliminary Application	Day 1
2. EDC determines it is a Target Industry	About Day 7
3. Committee meets and makes recommendation	Day 10-37
4. Commission approves Preliminary Application	About Day 45-60
Reimbursement Application	
1. Building or expansion opens.	
2. New development is added to tax rolls	The following January 1st
3. Applicant files Reimbursement App. for development fees	After 12 months of opening.
4. Applicant pays ad valorem taxes	Nov. thru Mar. after (2), above, occurs.
5. Applicant files Reimbursement App. for ad valorem taxes	The April after (4), above, occurs.
6. Committee determines amount of reimbursement	Within 30 days of application.

Source: EDC of Tallahassee/ Leon County, 2007

The EDC website includes valuable information and answers the frequently asked questions by interested businesses.

4.E Florida State Incentives³¹

Walter Diamond et al. (2006) listed all the tax incentives and capital requirements on a state-by-state basis. The investment incentives were associated with tax relief, tax reduction, and tax exemption. These are the main incentives for investment that enhances business competitiveness.

³¹ The subsections of 4.E are extracted from the following source: Walter H. Diamond, Dorothy B. Diamond, and Charles C. Luetke, **A State by State Guide to Investment Incentives and Capital Formation in the United States** 3rd edition. Kluwer Law International; (May 30, 2006).

Quantitatively, incentives have ranged between 3-11 categories among states. They include the following:

- 1- Tax credits
- 2- Cash grants
- 3- Tax exemptions
- 4- Tax reductions
- 5- Tax rebates, refunds, and options
- 6- Loans and other financing subsidies
- 7- Export inducements
- 8- Custom duties exemptions
- 9- Foreign trade zone inducement
- 10- Sales or turnover tax exemptions
- 11- Sales or turnover tax reductions

As categories, Alabama leads all the US states by including all the incentives. Florida (along with Georgia and New Mexico) included eight categories. Some other states such as Missouri and Nebraska offer fewer incentives to reach three categories.

A conclusion that could be drawn from the State-level investment incentives is that Alabama, Georgia and Florida offer incentives that any other states. The following section describes the tax incentives in greater detail.

4.E.1 Tax Credits

State of Florida Enterprise Zone legislation provides companies with a tax credit against the low corporate income taxes. The law provides tax credits for new employees equal to 96% of the school portion of ad valorem taxes for up to ten years to a maximum of \$50,000 annually, a 50% credit on Florida income tax for donations to local development projects and a credit up to \$200,000 annually per on interest-free loans for 15 years. There are more than 160 designated areas for Enterprise Zones in Florida. Capital-intensive industries engaged in financial services, silicon technology, transportation equipment manufacturing, information technology and biomedical technology could earn an annual capital investment tax-credit depending on the level of investment for up to twenty years against corporate income tax.

4.E.2 Cash Grants

Negotiated cash grants are dispensed to capital-intensive industries engaged in financial services, silicon technology, transportation equipment manufacturing, information technology and biomedical technology.

4.E.3 Tax Exemptions

There is no corporate income tax on limited partnerships or subchapter S-corporations. A constitutional provision prohibits the enactment of a personal income tax law. Capital stock is not subject to franchise tax. No statewide property tax is assessed. Business inventories are not taxed and goods in transit up to 180 days are not taxed.

4.E.4 Tax Reductions

Participation in training programs may reduce property taxes in Orlando.

4.E.5 Tax Rebates, Refunds and Options

Tax refunds of \$3,000 per new job created and \$6,000 per new job created in a rural county or an Enterprise Zone are available to targeted industries locating new facilities or expanding existing facilities in Florida. Companies paying high salaries may receive higher awards.

4.E.6 Loans and Other Financing Subsidies

Land and plant construction at the Miami Free Trade Zone Industrial Park can be financed by Park and County Industrial Development Authority bond issues offered at below prime interest rates. Florida has adopted a number of other incentives to attract business, including an anti-boycott statute, the Uniform Simplification of Fiduciary Security Transfer Act, a political contribution limitations law and an out-of-state taxation reciprocity provision for banking institutions. The State of Florida also offers the surrender of certain authority provisions regarding the certificate to do business required of foreign corporations.

4.E.7 Foreign Trade Zone Inducements

Foreign Trade Zones are at Port Everglades, Miami, Orlando, Panama City, Fort Myers, Palm Beach County Port Manatee, Homestead, Wynwood, Volusia County, Sebring, Ocala, St. Lucie County, Jacksonville and Tampa.

4.E.8 Sales or Turnover Tax Exemptions

There is no sales tax on Florida produced goods for export out of Florida. The purchase of raw materials used in a final product for resale is not taxed. Nor is there sales tax or use tax on boiler fuels, the co-generation of electricity or the purchase of machinery used in a new or expanding business.

Florida's Enterprise Zone Program (EZP) encourages economic growth and investment in disadvantaged areas by offering tax advantages and incentives to businesses that are located in and/or invest in these areas.

The Governor's Office of Tourism, Trade, and Economic Development (OTTED) administers the EZP program and Enterprise Florida helps market it to businesses. The Florida Department of Revenue process completes and approves tax incentive applications and provides technical assistance relating to eligibility requirements.

4.E.9 Alabama Incentives

In addition to providing the same incentives that are given by Florida, Alabama gives the following investment incentives:

- 1- Export inducements
- 2- Custom duties exemptions
- 3- Sales or turnover tax reductions

As stated before, these incentives can be thought of as possible incentives to be established by Florida. However, there is no doubt that these macro policies are well set and carefully studied on state level before deciding on introducing any incentive.

Micro-level policies are probably more important and have a higher chance of applicability when the issues relate to local city areas and decisions are taken on local city council level, as is the case with the EDC of Tallahassee/ Leon County.

4.F Is There a Need for More Incentives?

The answer to this question depends largely on the comparative methodology with the other states, and for Tallahassee, with other cities in Florida.

Whether there is a need for more incentives or not, marketing Tallahassee is an important issue in encouraging investors to do business in Tallahassee. Scott Allen states that "One of the basic concepts taught in almost every introductory marketing course are The Four P's: Price, Product, Promotion and Place...while place

is often the most permanent of the four P's, it's also often the most overlooked.” (Allen, 2007)

To affect the investors’ decision to choose Tallahassee as the home for their business, a competitive price (i.e. monetary incentives) should be offered, and a good product: Tallahassee QOL.

In the past, the principle of consumer sovereignty has dominated the consumer theory as the factor affecting the demand for any good. In today’s world, the sovereignty is not for consumers anymore, but for sellers.

That is all due to the highly effective promotion that not only sustains the preferences of consumers, but also might even divert their preferences for goods or services totally. With this vision, the EDC of Tallahassee/ Leon County has prepared this report in a plan to give the investors a clear and comprehensive guide to their business in Tallahassee.³²

5. GIS Analysis

FSU CEFA performed the GIS analysis using software called Workforce and Innovation Technical Solution (WITS), developed by New Economy Strategies and Decision Data. Decision Data Resources specializes in providing web-based data and Geographic Information System (GIS) applications.³³ This web-enabled database and GIS products and services are marketed to a broad range of clients, including commercial realtors, site consultants, retailers, utility companies, financial institutions, market research companies, economic and workforce developers, chambers of commerce, and federal, state, and local government agencies.

The WITS approach to business is predicated on establishing and maintaining strong and trusting business relationships with its clients and strategic business partners.

FSU CEFA has been serving in an advisory capacity and as a “beta tester” with the Florida Great Northwest Workforce Innovation Technical Solution (WITS)

³² In marketing Tallahassee, there are very useful websites in getting the necessary information about this issue. They include:

- 1- <http://www.edctallahasseeleon.com/>.
- 2- <http://www.businessflorida.com/>.
- 3- <https://www.eflorida.com/>.
- 4- <http://dor.myflorida.com/dor/>.

³³ WITS product and service offerings include a full range of GIS services, database design and development, data formatting services, and custom application solutions.

software since 2007. FSU CEFA has complimentary access to many databases (WITS cites over 1,000 databases) that are normally available for a significant cost. FSU CEFA has been actively using the WITS economic development and employment data, and importing strategic location maps as overlays with the data.

5.A Analysis Tools in WITS

There are useful tools in WITS that are interrelated. They include theme maps, standard reports, list reports, key industries, and research reports. This section will cover some of these tools.

5.A.1 Standard reports

The **standard reports** include summary, comparison, rank and map data for many demographics such as:

1. Making a custom summary report
2. Simple demographics
3. Age by gender
4. Consumer expenditure
5. Demographic detail
6. Demographic snapshot charts
7. Demographic summary index
8. Demographic trend
9. Executive demographics
10. Executive summary with charts
11. Household summary
12. Housing units
13. Income
14. Income by age
15. Mature market summary
16. Population
17. US census 1980-2000 trend with charts
18. US census employment
19. US census household detail
20. US census housing value
21. US census overview
22. US census race ethnicity ancestry
23. Business
24. Business - large establishment

5.A.2 List Reports

List reports tools includes databases for 19 different variables. The most critical report is the Business Listing Report by North American Industrial Classification System (NAICS). The traffic counts (GDT) report is also a useful report.

Appendix 8.A includes a business list by the Standard Industrial Classification (SIC) as example list reports. The appendix shows that there are 216 businesses within a radius of 3 miles around the EDC address. The list is much larger if no constraint is put on the number of employees. With no constraint on employees, WITS report would exceed 1,000 businesses.

5.A.3 Key industries

Key industries reports are available for the WIRED Region Detail and WIRED Region Overview.

5.A.4 Search Report

The Article **Search Report** performs geographically relevant searches of the article repository based on a search term and/or date.

5.A.5 Mapping

This database includes useful mapping techniques that will be used in the study. The WITS tools data can be obtained not only on the county or city level but also on the zip code level. More interesting, area selection can be customized. For example, it is simple for WITS to get data within a given radii distance in miles or kilometers or even within some drive time limit (in minutes). The statistics obtained could be mapped or reported. These maps may be set in many different ways; important places are also easy to locate on the map, like airports, parks, roads, rivers, zip codes, counties, business locations...etc.

5.B Analysis and Mapping: The EDC and Surrounding Areas

Figures 6 through 12 include some customized WITS output using the Tallahassee EDC as a central point (100 N Duval St., Tallahassee):

- ♦ Figure 6 - Simple Demographics.
- ♦ Figure 7 - Average Household Income.
- ♦ Figure 8 - Business Establishments.

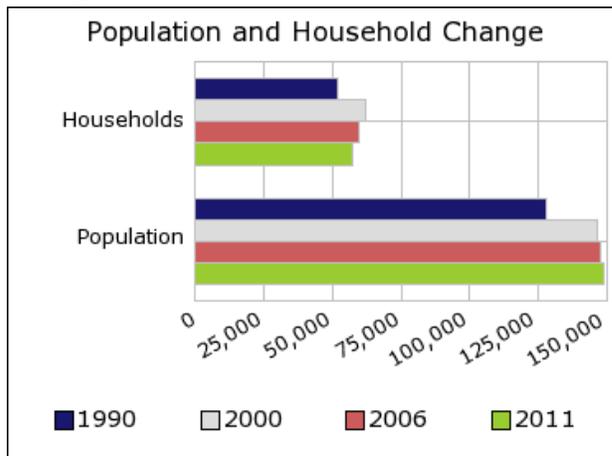
- ♦ Figure 9 - A Sample Report Of Agricultural Business Establishments’.
- ♦ Figure 10 - Population Density.
- ♦ Figure 11 - Lists An Example Of Skilled Trades By Company.
- ♦ Figure 12 - Shows Population Density.

But the focus in this figure is on driving time. These are just some examples of results that could be obtained using the WITS database.

5.B.1 Executive Summary Report with Charts

5.B.1.1 Population Demographics

Figure 8: Population and Household in the Area Surrounding of the EDC (1990—2011)



The number of households in the study area in the year 1990 was **51,814** and increased to **61,986** in the year 2000, representing an increase of **19.6%**. The household count in the year 2006 was **59,637** and the household projection for 2011 is **57,612**, a decrease of **3.4%**. The population in the study area in the year 1990 was **128,018**

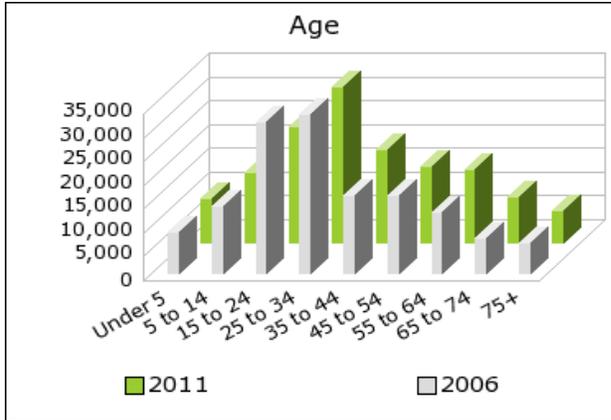
and in the year 2000, it was **146,426**, roughly a **14.4%** increase. The population in the year 2006 was **147,418** and the projection for 2011 is **148,507** representing an increase of **0.7%**. **Table 66: Population and Household in the Area Surrounding the EDC (1990-2011)**

	1990 Census	2000 Census	2006 Estimate	2011 Projection	1990 to 2000	2006 to 2011
Total Population	128,018	146,426	147,418	148,507	14.4%	0.7%
Total Households	51,814	61,986	59,637	57,612	19.6%	-3.4%

Source: WITS, 2007.

5.B.1.2 Population by Age

Figure 9: Population Distribution by Age in the Area Surrounding the EDC (2006, 2011)



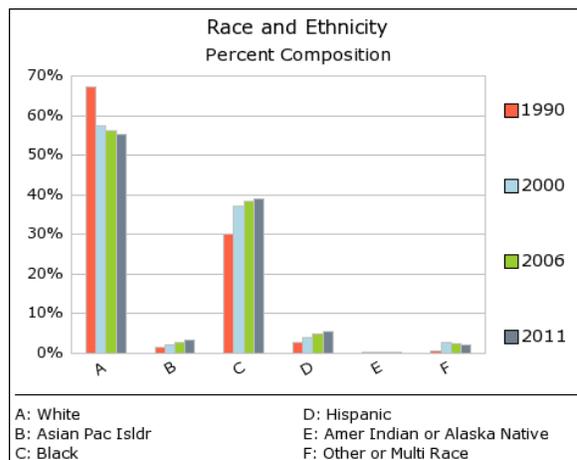
Males represented **47.4%** of the population with a median age of **29.2** years. In the year 2006, the most prominent age group in this geography is **Age 25 to 34** years. The age group least represented in this geography is **75 +** years.

Table 67: Population Distribution by Age in the Area Surrounding the EDC (1990–2011)

Age Groups	1990 Census	%	2000 Census	%	2006 Estimate	%	2011 Projection	%	1990 to 2000	2006 to 2011
0 to 4	7,356	5.8%	7,480	5.1%	8,732	5.9%	9,252	6.2%	1.7%	6.0%
5 to 14	13,571	10.6%	13,407	9.2%	13,973	9.5%	14,730	9.9%	-1.2%	5.4%
15 to 19	13,484	10.5%	17,653	12.1%	11,865	8.1%	9,880	6.7%	30.9%	-16.7%
20 to 24	24,380	19.0%	31,446	21.5%	19,942	13.5%	14,491	9.8%	29.0%	-27.3%
25 to 34	23,458	18.3%	23,747	16.2%	33,300	22.6%	32,869	22.1%	1.2%	-1.3%
35 to 44	17,181	13.4%	16,957	11.6%	16,443	11.2%	19,483	13.1%	-1.3%	18.5%
45 to 54	9,762	7.6%	15,168	10.4%	16,451	11.2%	16,010	10.8%	55.4%	-2.7%
55 to 64	7,573	5.9%	8,351	5.7%	12,925	8.8%	15,356	10.3%	10.3%	18.8%
65 to 74	6,502	5.1%	6,051	4.1%	7,511	5.1%	9,699	6.5%	-6.9%	29.1%
75 +	4,744	3.7%	6,167	4.2%	6,276	4.3%	6,737	4.5%	30.0%	7.3%

Source: WITS, 2007.

Figure 10: Population Distribution by Race and Ethnicity in the Area Surrounding the EDC (2006, 2011)



In the year 2006, the predominant race/ethnicity category in this study area was **White**. The race & ethnicity category least represented in this geography was **American Indian, Alaska Native**.

Table 68: Population Distribution by Race and Ethnicity in the Area Surrounding the EDC (2006-2011)

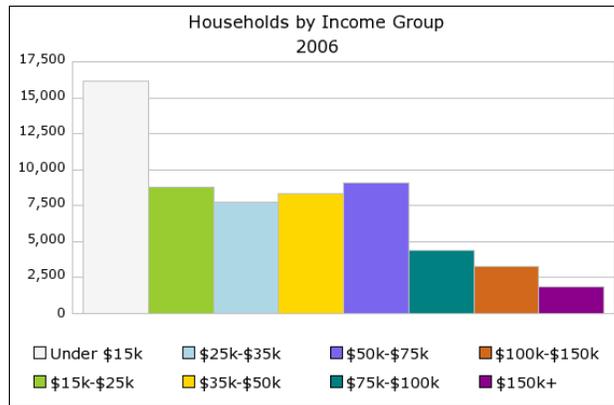
Race & Ethnicity	1990 Census	%	2000 Census	%	2006 Estimate	%	2011 Projection	%	1990 to 2000	2006 to 2011
White	86,202	67.3%	84,247	57.5%	82,746	56.1%	81,964	55.2%	-2.3%	-0.9%

African American	38,557	30.1%	54,610	37.3%	56,728	38.5%	58,099	39.1%	41.6%	2.4%
American Indian or Alaska Native	324	0.3%	393	0.3%	309	0.2%	250	0.2%	21.3%	-19.0%
Asian or Pacific Islander	2,057	1.6%	3,193	2.2%	4,154	2.8%	4,810	3.2%	55.3%	15.8%
Other Race	872	0.7%	1,458	1.0%	1,274	0.9%	1,427	1.0%	67.3%	12.1%
Two or More Races			2,525	1.7%	2,207	1.5%	1,955	1.3%		-11.4%
Hispanic Ethnicity	3,681	2.9%	6,041	4.1%	7,215	4.9%	8,120	5.5%	64.1%	12.5%
Not Hispanic or Latino	124,337	97.1%	140,385	95.9%	140,203	95.1%	140,387	94.5%	12.9%	0.1%

Source: WITS, 2007.

5.B.1.3 Household Income

Figure 11: Households by Income Group (2006)



In the year 2006 the predominant household income category in this area surrounding the EDC is below \$15,000, and the income group that is least represented in this geography is \$150,000 or above.

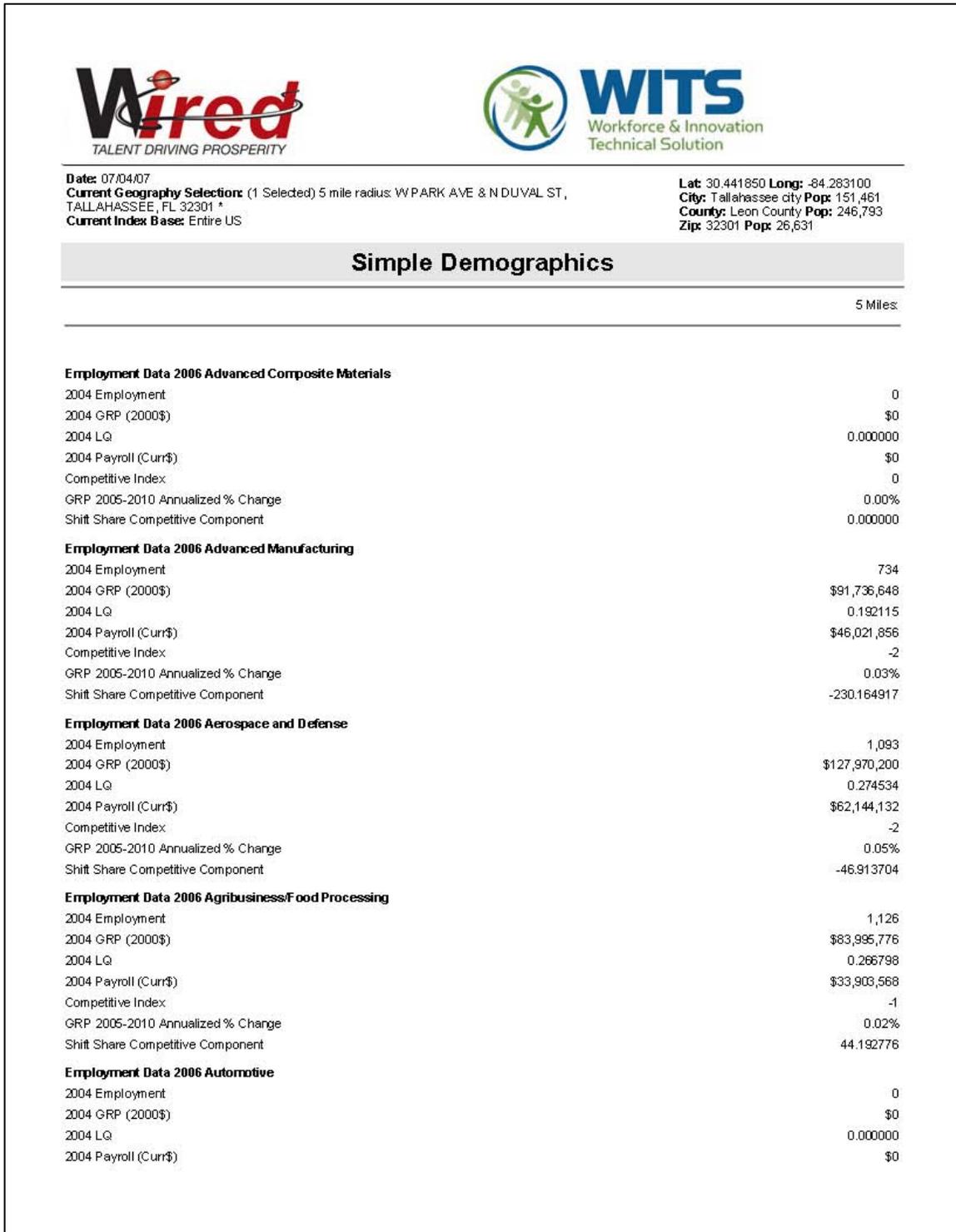
Table 69: Household Income Groups (1990-2011)

HH Income Categories	1990 Census	%	2000 Census	%	2006 Estimate	%	2011 Projection	%	1990 to 2000	2006 to 2011
\$0 - \$15,000	17,734	34.2%	17,899	28.9%	16,150	27.1%	14,963	26.0%	0.9%	-7.3%
\$15,000 - \$24,999	10,345	20.0%	10,275	16.6%	8,778	14.7%	7,939	13.8%	-0.7%	-9.6%
\$25,000 - \$34,999	7,757	15.0%	8,404	13.6%	7,729	13.0%	7,556	13.1%	8.3%	-2.2%
\$35,000 - \$49,999	6,839	13.2%	8,914	14.4%	8,372	14.0%	7,660	13.3%	30.3%	-8.5%
\$50,000 - \$74,999	5,955	11.5%	8,850	14.3%	9,106	15.3%	8,753	15.2%	48.6%	-3.9%
\$75,000 - \$99,999	1,817	3.5%	3,846	6.2%	4,420	7.4%	4,821	8.4%	111.7%	9.1%
\$100,000 - \$149,999	808	1.6%	2,399	3.9%	3,247	5.4%	3,752	6.5%	196.8%	15.5%
\$150,000 +	536	1.0%	1,400	2.3%	1,835	3.1%	2,169	3.8%	160.9%	18.2%
Average Hhld Income	\$30,593		\$40,171		\$44,279		\$47,780		31.3%	7.9%
Median Hhld Income	\$22,639		\$28,206		\$31,172		\$32,534		24.6%	4.4%
Per Capita Income	\$12,672		\$17,006		\$18,930		\$19,471		34.2%	2.9%

*Reports requiring summarization use only the largest Radius or Drive Time around each center point to calculate results.

Source: WITS, 2007.

Figure 12: Simple Demographics in the Area Surrounding the EDC



Competitive Index	0
GRP 2005-2010 Annualized % Change	0.00%
Shift Share Competitive Component	0.000000
Employment Data 2006 Construction	
2004 Employment	7,093
2004 GRP (2000\$)	\$340,054,080
2004 LQ	0.680033
2004 Payroll (Curr\$)	\$243,248,160
Competitive Index	2
GRP 2005-2010 Annualized % Change	0.03%
Shift Share Competitive Component	826.486328
Employment Data 2006 Creative Media Arts	
2004 Employment	0
2004 GRP (2000\$)	\$0
2004 LQ	0.000000
2004 Payroll (Curr\$)	\$0
Competitive Index	0
GRP 2005-2010 Annualized % Change	0.00%
Shift Share Competitive Component	0.000000
Employment Data 2006 Energy/Alternative Fuels	
2004 Employment	1,425
2004 GRP (2000\$)	\$156,090,704
2004 LQ	0.332950
2004 Payroll (Curr\$)	\$76,210,960
Competitive Index	-1
GRP 2005-2010 Annualized % Change	0.03%
Shift Share Competitive Component	-47.181458
Employment Data 2006 Financial Services	
2004 Employment	0
2004 GRP (2000\$)	\$0
2004 LQ	0.000000
2004 Payroll (Curr\$)	\$0
Competitive Index	0
GRP 2005-2010 Annualized % Change	0.00%
Shift Share Competitive Component	0.000000
Employment Data 2006 Healthcare	
2004 Employment	11,377
2004 GRP (2000\$)	\$593,548,736
2004 LQ	0.883919
2004 Payroll (Curr\$)	\$476,155,264
Competitive Index	0
GRP 2005-2010 Annualized % Change	0.01%
Shift Share Competitive Component	-2,064.412598
Employment Data 2006 Information Technology	
2004 Employment	3,166
2004 GRP (2000\$)	\$345,947,360
2004 LQ	0.920695
2004 Payroll (Curr\$)	\$183,562,176
Competitive Index	3
GRP 2005-2010 Annualized % Change	0.07%
Shift Share Competitive Component	524.647400

Employment Data 2006 Life Sciences

2004 Employment	3,528
2004 GRP (2000\$)	\$260,357,408
2004 LQ	0.887218
2004 Payroll (Curr\$)	\$186,191,456
Competitive Index	2
GRP 2005-2010 Annualized % Change	0.04%
Shift Share Competitive Component	538.448059

Employment Data 2006 Logistics

2004 Employment	0
2004 GRP (2000\$)	\$0
2004 LQ	0.000000
2004 Payroll (Curr\$)	\$0
Competitive Index	0
GRP 2005-2010 Annualized % Change	0.00%
Shift Share Competitive Component	0.000000

Employment Data 2006 Marine Ship Building

2004 Employment	0
2004 GRP (2000\$)	\$0
2004 LQ	0.000000
2004 Payroll (Curr\$)	\$0
Competitive Index	0
GRP 2005-2010 Annualized % Change	0.00%
Shift Share Competitive Component	0.000000

Employment Data 2006 Optics

2004 Employment	0
2004 GRP (2000\$)	\$0
2004 LQ	0.000000
2004 Payroll (Curr\$)	\$0
Competitive Index	0
GRP 2005-2010 Annualized % Change	0.00%
Shift Share Competitive Component	0.000000

Employment Data 2006 Wood Products

2004 Employment	0
2004 GRP (2000\$)	\$0
2004 LQ	0.000000
2004 Payroll (Curr\$)	\$0
Competitive Index	0
GRP 2005-2010 Annualized % Change	0.00%
Shift Share Competitive Component	0.000000

Occupation and Employment 1990

% Employed	94.15%
% in Labor Force	67.45%

Occupation and Employment 1990 Female (Pop 16 Plus)

Civilian Employed	33,854
Not in Labor Force	20,043

Occupation and Employment 2006

% Civilian Employed	95.53%
% Not in labor force	33.66%

Occupation and Employment 2011

Figure 13: Average Household Income in the Area Surrounding the EDC



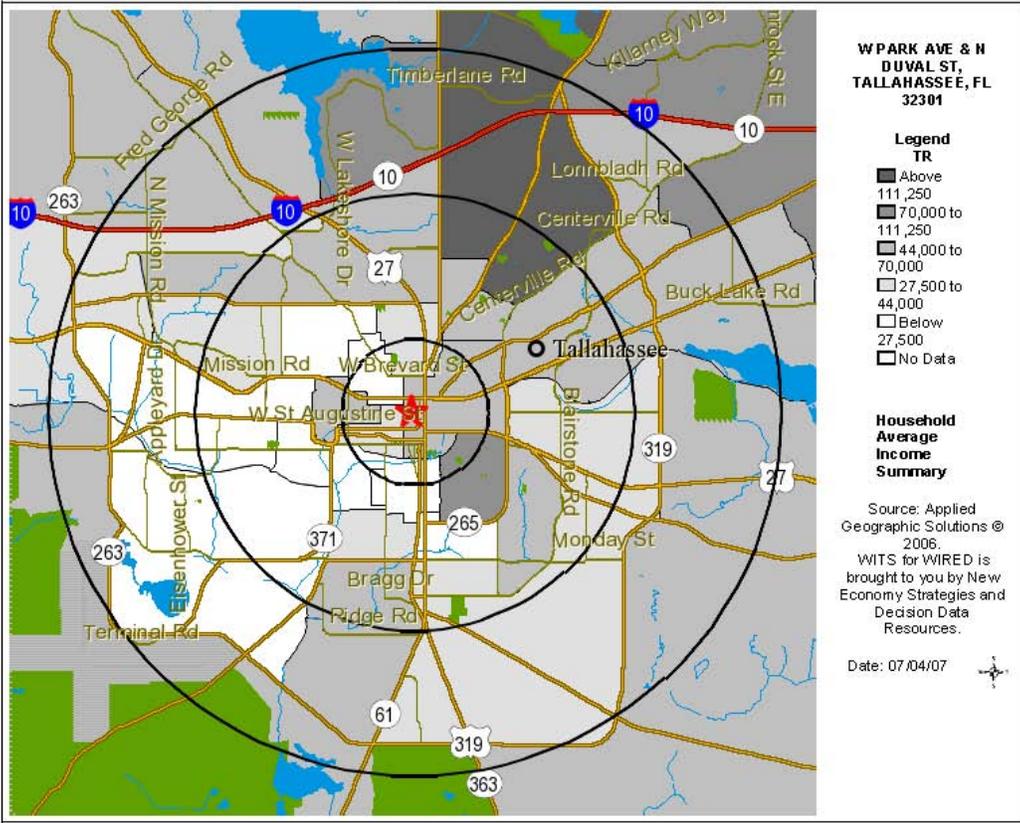
Date: 07/04/07

Current Geography Selection: (3 Selected) 1, 3, 5 mile radii: WPARK AVE & N DUVAL ST, TALLAHASSEE, FL 32301

Your title for this geography: EDC Tallahassee
Current Index Base: Entire US

Lat: 30.441850 Long: -84.283100
City: Tallahassee city Pop: 151,461
County: Leon County Pop: 246,793
Zip: 32301 Pop: 26,631

Average Household Income



Current year data is for the year 2006, 5 year projected data is for the year 2011. More About Our Data.
Demographic data © 2006 by Experian/Applied Geographic Solutions.
Traffic Count data © 2006 by Tele Atlas. All rights reserved.
Business List data © 2006 by InfoUSA. All rights reserved.

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Figure 14: Business Establishments in the Area Surrounding the EDC



Date: 07/04/07

Current Geography Selection: (3 Selected) 1, 3, 5 mile radii: WPARK AVE & N DUVAL ST, TALLAHASSEE, FL 32301

Your title for this geography: EDC Tallahassee

Current Index Base: Entire US

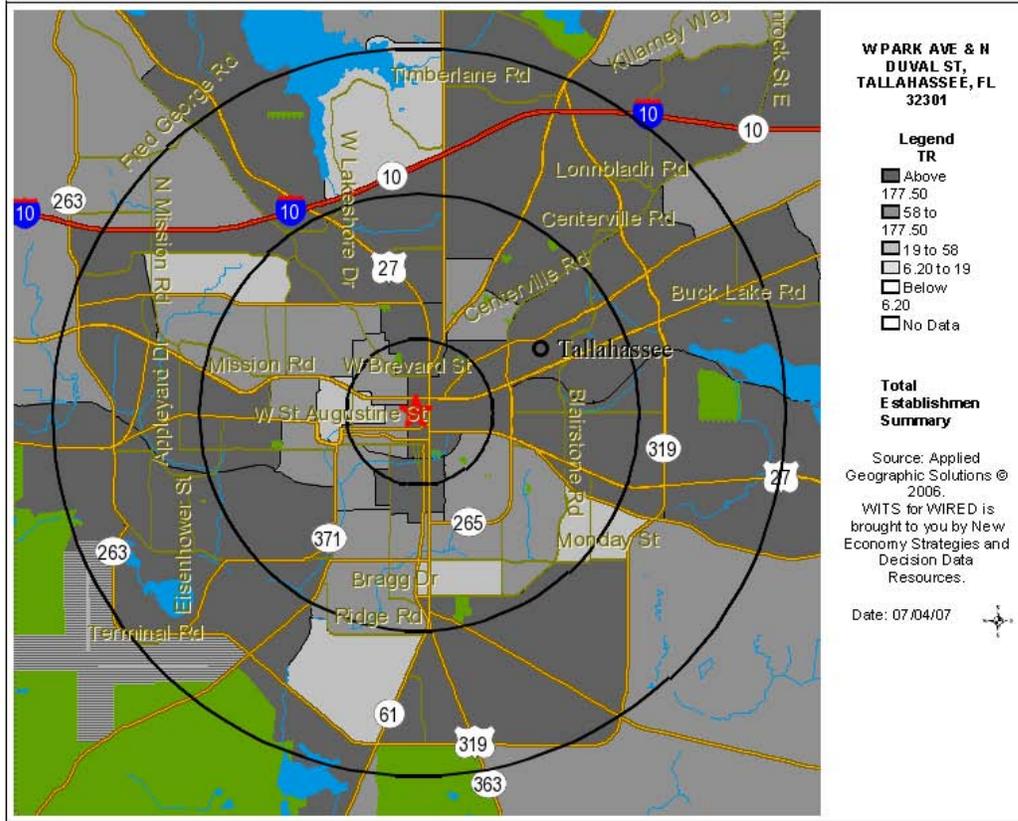
Lat: 30.441850 Long: -84.283100

City: Tallahassee city Pop: 151,461

County: Leon County Pop: 246,793

Zip: 32301 Pop: 26,631

Business Establishments



Current year data is for the year 2006, 5 year projected data is for the year 2011. More About Our Data.

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Figure 15: Agricultural Business Establishments Reports in the Area Surrounding the EDC



Figure 16: Population Density in the Area Surrounding the EDC (Within Five-Miles Radius)



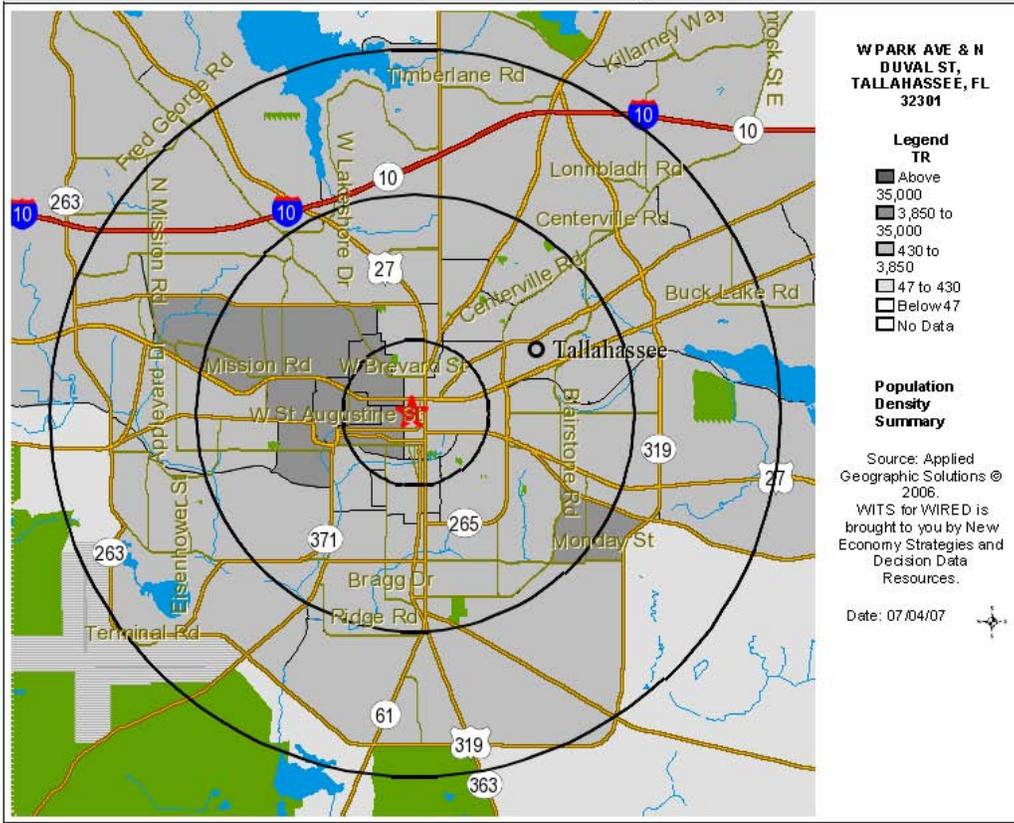
Date: 07/04/07

Current Geography Selection: (3 Selected) 1, 3, 5 mile radii: WPARK AVE & N DUVAL ST, TALLAHASSEE, FL 32301

Your title for this geography: EDC Tallahassee
Current Index Base: Entire US

Lat: 30.441850 Long: -84.283100
City: Tallahassee city Pop: 151,461
County: Leon County Pop: 246,793
Zip: 32301 Pop: 26,631

Population Density



Current year data is for the year 2006, 5 year projected data is for the year 2011. More About Our Data.
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Figure 17: Skilled Trades by Skill and Company in the Area Surrounding the EDC



Date: 07/04/07
Current Geography Selection: 5 mile radius: W PARK AVE & N DUVAL ST, TALLAHASSEE, FL 32301
Current Index Base: Entire US

EmployOn Area List - Skilled Trades

Selected Months: Jun 2007

Skilled Trades

Company	Total	Computer and Mathematical	Architecture and Engineering	Arts, Design, Entertainment, Sports, and Media	Construction and Extraction	Production
AFFILIATED COMPUTER SERVICES, INC.	0	0	0	0	0	0
ALLTEL CORPORATION	1	1	0	0	0	0
ANTEON INTERNATIONAL CORPORATION	0	0	0	0	0	0
BRANCH BANKING AND TRUST COMPANY	0	0	0	0	0	0
CARDINAL HEALTH, INC.	1	1	0	0	0	0
CIBER, INC.	12	11	1	0	0	0
ERS GROUP	1	1	0	0	0	0
FIRST AMERICAN EQUITY LOAN SERVICES	0	0	0	0	0	0
GENERAL DYNAMICS CORPORATION	0	0	0	0	0	0
MORGAN STANLEY	0	0	0	0	0	0
ROBERT BOETTNER	1	0	0	1	0	0
SANOFI-AVENTIS	0	0	0	0	0	0
SODEXHO, INC.	0	0	0	0	0	0
SOUTHWEST RESEARCH INSTITUTE	1	1	0	0	0	0
THE PRINCIPAL FINANCIAL GROUP	0	0	0	0	0	0

Current year data is for the year **2006**, 5 year projected data is for the year **2011**. More About Our Data.
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Figure 18: Population Density in the Area Surrounding the EDC (Within 15 Minutes Drive Time)



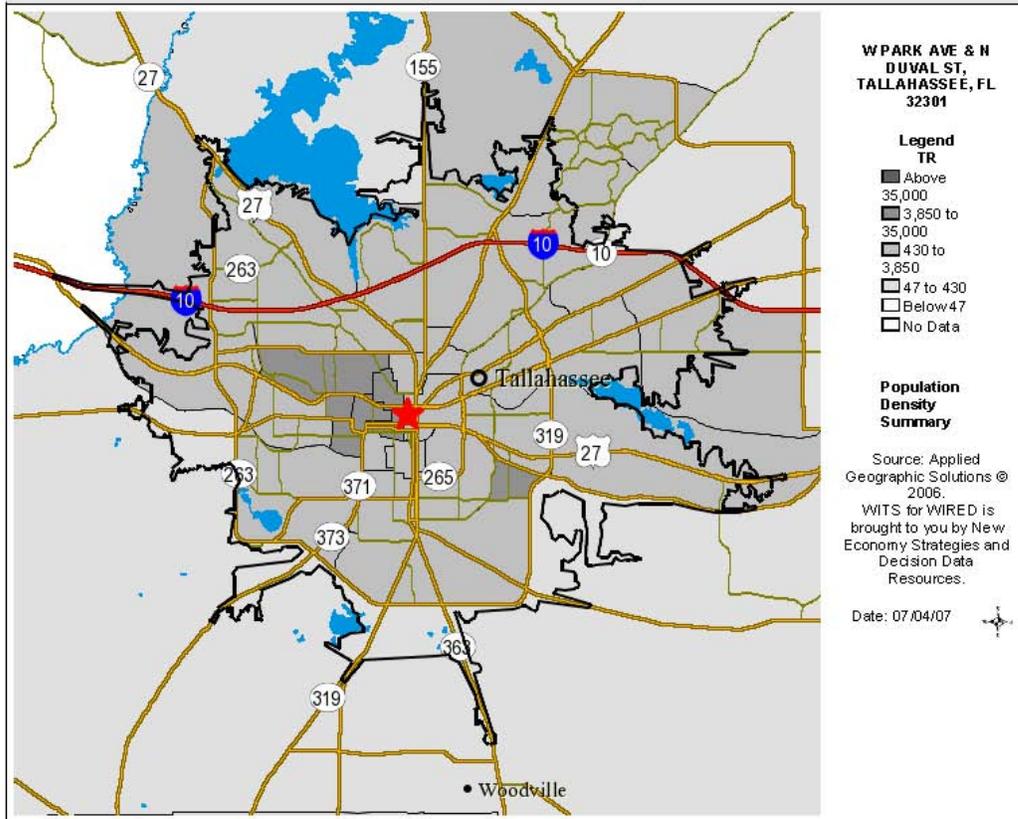
Date: 07/04/07

Current Geography Selection: (1 Selected) 15 minute drive time: WPARK AVE & N DUVAL ST, TALLAHASSEE, FL 32301

Current Index Base: Entire US

Lat: 30.441850 Long: -84.283100
 City: Tallahassee city Pop: 151,461
 County: Leon County Pop: 246,793
 Zip: 32301 Pop: 26,631

Population Density



Current year data is for the year 2006, 5 year projected data is for the year 2011. More About Our Data.
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5.C Strategic Locations (Based On Tallahassee Targeted Issues Committee Definition)

5.C.1 Demographics

The primary strategic locations in Tallahassee are the Gaines Street area, the Frenchtown area, and the Tallahassee Regional Airport area.

5.D Enterprise Zone

The next table summarizes demographics in the enterprise zone. Prior to the table, a summary of demographic information in the enterprise zone is provided.

5.D.1.1 Population

The year 2007 population was 59,590. The 2000 Census showed a population of 60,879, and in the year 1990, it was 53,948 representing a 12.9% increase. It was estimated that the population will be 59,856 in the year 2012, representing an increase of 0.4% from 2007. The population was 48.4% male and 51.6% female. In the year 2007, the median age of the population was 24.2, compared to the US median age that was 36.7. The population density was 2,985.8 people per square mile.

5.D.1.2 Households

There were 27,533 households in the year 2007. The Census showed household counts of 25,322 in the year 2000, up from 22,873 in the year 1990, representing an increase of 10.7%. It was estimated that the number of households will be 29,133 in the year 2012, representing an increase of 5.8% from the year 2007. For the year 2007, the average household size was 2.16 persons. In the year 2007, the median number of years in residence in this geography's population was 1.66. The average household size was 1.92 people and the average family size was 2.78 people. The average number of vehicles per household in this geography was 1.5.

5.D.1.3 Income

In the year 2007, the median household income was \$18,338, compared to the US median that was \$51,680. The Census showed median household incomes of \$15,932 in the year 2000 and \$12,598 in the year 1990 representing an increase of 26.5%. It was estimated that the median household income will be \$19,860 in the year 2012, which would represent an increase of 8.3% from the year 2007.

In the year 2007, the per capita income was \$14,671, compared to the \$US per capita, which was \$25,232. The 2007 average household income was \$27,493, compared to the US average of \$65,273.

5.D.1.4 Race & Ethnicity

In the year 2007, the racial makeup was as follows: 45.5% White; 48.2% African American; 0.2% Native American; 3.2% Asian/Pacific Islander, and 1.2% other. This can be compared to the US racial makeup of 74.5% White, 12.0% African American, 0.8% Native American, 4.6% Asian/Pacific Islander and 5.3% Other.

People of Hispanic ethnicity are counted independently of race. People of Hispanic origin made up 5.9% of the year 2007 population when compared to the US makeup of 15.1%. Changes in the population within each race and ethnicity category from the 1990 Census to the 2000 Census were as follows: 13.3% American Indian, Eskimo, Aleut Population; 22.5% Asian, Pacific Islander; 24.2% African American; 84.1% Hispanic Ethnicity; 47.7% Other; and White -2.2%.

5.D.1.5 Housing

The median housing value was \$45,088 in the year 1990; compared to the US median of \$78,382 for the same year. The 2000 Census median housing value was \$62,882, which was a 39.5% increase from 1990. In the year 1990, there were 6,191 owner occupied housing units vs. 5,530 in the year 2000. Also in the year 1990, there were 16,682 renter occupied housing units vs. 19,792 in the year 2000. The average rent in the year 1990 was \$299 vs. \$435 in the year 2000.

5.D.1.6 Employment

In the year 2007, there were 32,164 people over the age of 16 in the labor force. Of these 83.1% were employed, 16.8% were unemployed, 34.2% were not in the labor force and 0.1% were in the Armed Forces. In the year 1990, unemployment was 8.9% and in the year 2000, it was 19.1%. In the year 2007, there were 62,876 employees (daytime population) and 3,564 business establishments.

In the year 1990, 64.9% of employees were employed in white-collar occupations and 35.1% were employed in blue-collar occupations. In the year 2000, white-collar workers made up 64.8% of the population, and those employed in blue-collar occupations made up 35.2%. In the year 1990, the average time traveled to work was 9 minutes and in the year 2000, it was 16 minutes.

Table 70: Summary of Demographics in the Enterprise Zone (2007)

Population Demographics										
									Percent Change	
	1990 Census		2000 Census		2007 Estimate		2012 Projection		1990 to 2000	2007 to 2012
Total Population	53,948		60,879		59,590		59,856		12.9%	0.4%
Population Density (Pop/Sq Mi)	2,703.1		3,050.4		2,985.8		2,999.1		12.9%	0.4%
Total Households	22,873		25,322		27,533		29,133		10.7%	5.8%
Population by Gender										
Male	25,848	47.9%	29,277	48.1%	28,870	48.5%	29,135	48.7%	13.3%	0.9%
Female	28,100	52.1%	31,603	51.9%	30,719	51.6%	30,721	51.3%	12.5%	0.0%
Population by Race/Ethnicity										
									Percent Change	
	1990 Census		2000 Census		2007 Estimate		2012 Projection		1990 to 2000	2007 to 2012
White	27,530	51.0%	26,938	44.3%	27,121	45.5%	27,469	45.9%	-2.2%	1.3%
Black	24,657	45.7%	30,615	50.3%	28,693	48.2%	27,943	46.7%	24.2%	-2.6%
American Indian or Alaska Native	130	0.2%	147	0.2%	146	0.3%	139	0.2%	13.3%	-4.7%
Asian or Pacific Islander	1,124	2.1%	1,376	2.3%	1,879	3.2%	2,210	3.7%	22.5%	17.6%
Some Other Race	507	0.9%	749	1.2%	724	1.2%	987	1.7%	47.7%	36.3%
Two or More Races			1,055	1.7%	1,025	1.7%	1,109	1.9%		8.1%
Hispanic Ethnicity	1,569	2.9%	2,889	4.7%	3,502	5.9%	4,070	6.8%	84.1%	16.2%
Not Hispanic or Latino	52,379	97.1%	57,991	95.3%	56,088	94.1%	55,786	93.2%	10.7%	-0.5%
Population by Age										
									Percent Change	
	1990 Census		2000 Census		2007 Estimate		2012 Projection		1990 to 2000	2007 to 2012
0 to 4	3,020	5.6%	2,900	4.8%	4,009	6.7%	4,328	7.2%	-4.0%	7.9%
5 to 14	5,087	9.4%	4,453	7.3%	5,967	10.0%	6,545	10.9%	-12.5%	9.7%
15 to 19	6,593	12.2%	10,584	17.4%	6,272	10.5%	4,443	7.4%	60.5%	-29.2%
20 to 24	15,745	29.2%	20,289	33.3%	15,919	26.7%	10,314	17.2%	28.9%	-35.2%
25 to 34	9,623	17.8%	8,754	14.4%	10,742	18.0%	13,834	23.1%	-9.0%	28.8%
35 to 44	5,064	9.4%	5,075	8.3%	4,834	8.1%	5,635	9.4%	0.2%	16.6%
45 to 54	2,626	4.9%	3,567	5.9%	4,276	7.2%	4,662	7.8%	35.8%	9.0%
55 to 64	2,270	4.2%	1,992	3.3%	3,633	6.1%	4,752	7.9%	-12.2%	30.8%
65 to 74	2,186	4.1%	1,621	2.7%	2,276	3.8%	3,287	5.5%	-25.9%	44.4%
75 to 84	1,359	2.5%	1,199	2.0%	1,281	2.2%	1,550	2.6%	-11.8%	21.1%
85+	375	0.7%	446	0.7%	511	0.9%	606	1.0%	18.7%	18.6%
Median Age:										
Total Population	23.6		22.2		24.2		27.3		-5.8%	13.0%
Households by Income										
									Percent Change	
	1990 Census		2000 Census		2007 Estimate		2012 Projection		1990 to 2000	2007 to 2012
\$0 - \$15,000	12,739	55.7%	12,103	47.8%	11,995	43.6%	12,026	41.3%	-5.0%	0.3%
\$15,000 - \$24,999	4,968	21.7%	5,047	19.9%	5,107	18.6%	5,201	17.9%	1.6%	1.8%
\$25,000 - \$34,999	2,474	10.8%	3,394	13.4%	3,651	13.3%	3,584	12.3%	37.2%	-1.8%
\$35,000 - \$49,999	1,569	6.9%	2,383	9.4%	3,006	10.9%	3,581	12.3%	51.9%	19.1%
\$50,000 - \$74,999	810	3.5%	1,404	5.5%	2,102	7.6%	2,606	8.9%	206.7%	24.0%
\$75,000 - \$99,999	199	0.9%	590	2.3%	884	3.2%	925	3.2%	196.4%	4.6%
\$100,000 - \$149,999	37	0.2%	212	0.8%	496	1.8%	822	2.8%	475.9%	65.6%
\$150,000 +	70	0.3%	188	0.7%	292	1.1%	390	1.3%	168.8%	33.5%
Average Hhld Income	\$17,897		\$23,681		\$27,493		\$29,290		32.3%	6.5%
Median Hhld Income	\$12,598		\$15,932		\$18,338		\$19,860		26.5%	8.3%
Per Capita Income	\$7,834		\$9,850		\$14,671		\$16,204		25.7%	10.5%

Table 71: Household Summary Report in the Enterprise Zone (2007)

Employment and Business										
	1990 Census				2000 Census				Percent Change	
	1990 Census		2000 Census		2007 Estimate		2012 Projection		1990 to 2000	2007 to 2012
Age 16 + Population	45,383		53,102		48,930		48,457		17.0%	-1.0%
In Labor Force	28,085	61.9%	33,130	62.4%	32,164	65.7%	31,901	65.8%	18.0%	-0.8%
Employed	25,462	90.7%	26,739	80.7%	26,719	83.1%	26,524	83.2%	5.0%	-0.7%
Unemployed	2,493	8.9%	6,340	19.1%	5,397	16.8%	5,326	16.7%	154.4%	-1.3%
In Armed Forces	120	0.3%	51	0.2%	48	0.1%	50	0.1%	-57.4%	4.3%
Not In Labor Force	17,298	38.1%	19,972	37.6%	16,718	34.2%	16,506	34.1%	15.5%	-1.3%
Number of Employees (Daytime Pop)					62,876					
Number of Establishments					3,564					
Emp in Blue Collar Occupations			9,402	35.2%						
Emp in White Collar Occupations			17,337	64.8%						
Housing Units										
	1990 Census				2000 Census				Percent Change	
	1990 Census		2000 Census		2007 Estimate		2012 Projection		1990 to 2000	2007 to 2012
Total Housing Units	26,148		28,428		31,529		33,721		8.7%	7.0%
Owner Occupied	6,191	23.7%	5,530	19.5%	7,222	22.9%	8,221	24.4%	-10.7%	13.8%
Renter Occupied	16,682	63.8%	19,792	69.6%	20,311	64.4%	20,913	62.0%	18.6%	3.0%
Vacant	3,275	12.5%	3,106	10.9%	3,996	12.7%	4,588	13.6%	-5.2%	14.8%
Vehicles Available										
	1990 Census				2000 Census				Percent Change	
	1990 Census		2000 Census		2007 Estimate		2012 Projection		1990 to 2000	2007 to 2012
Average Vehicles Per Hhld	1.30		1.20		1.50		1.70		-7.5%	11.1%
0 Vehicles Available	4,332	16.5%	3,935	15.5%	2,891	10.5%	2,366	8.1%	-9.2%	-18.2%
1 Vehicle Available	9,981	38.1%	12,370	48.9%	13,153	47.8%	13,607	46.7%	23.9%	3.5%
2+ Vehicles Available	11,888	45.4%	9,016	35.6%	11,490	41.7%	13,161	45.2%	-24.2%	14.5%
Marital Status										
	1990 Census				2000 Census				Percent Change	
	1990 Census		2000 Census		2007 Estimate		2012 Projection		1990 to 2000	2007 to 2012
Age 15+ Population	45,840		53,526		49,745		49,079		16.8%	-1.3%
Married, Spouse Present	10,313	22.5%	7,121	13.3%	6,873	13.8%	6,821	13.9%	-31.0%	-0.8%
Married, Spouse Absent	1,105	2.4%	4,777	8.9%	3,990	8.0%	3,787	7.7%	332.4%	-5.1%
Divorced	4,157	9.1%	3,827	7.2%	3,688	7.4%	3,659	7.5%	-7.9%	-0.8%
Widowed	2,341	5.1%	1,734	3.2%	1,653	3.3%	1,631	3.3%	-25.9%	-1.3%
Never Married	27,924	60.9%	36,068	67.4%	33,540	67.4%	33,181	67.6%	29.2%	-1.1%
Educational Attainment										
	1990 Census				2000 Census				Percent Change	
	1990 Census		2000 Census		2007 Estimate		2012 Projection		1990 to 2000	2007 to 2012
Age 25+ Population	23,503		22,654		27,552		34,325		-3.6%	24.6%
Grade K - 8	2,493	10.6%	1,043	4.6%	1,477	5.4%	1,638	4.8%	-58.2%	10.9%
Grade 9 - 12	3,715	15.8%	3,193	14.1%	2,130	7.7%	1,682	4.9%	-14.0%	-21.0%
High School Graduate	5,187	22.1%	4,822	21.3%	5,643	20.5%	6,727	19.6%	-7.0%	19.2%
Some College, No Degree	3,869	16.5%	4,986	22.0%	5,803	21.1%	6,857	20.0%	28.9%	18.2%
Associates Degree	1,778	7.6%	1,622	7.2%	2,505	9.1%	3,513	10.2%	-8.8%	40.2%
Bachelor's Degree	3,980	16.9%	3,868	17.1%	5,834	21.2%	8,175	23.8%	-2.8%	40.1%
Graduate Degree	2,491	10.6%	2,865	12.7%	4,160	15.1%	5,733	16.7%	15.0%	37.8%
No Schooling Completed			255	1.1%						

5.D.2 Business Listing by NAICS in the Enterprise Zone

This area included 4,035 businesses as defined by NAICS. The whole database of industries is listed in an appendix. However, the business sectors of Enterprise Zone as figures are shown below. The table below depicts the number of businesses distributed by sector, also shown as a histogram. Professional scientific and technical services sector has the highest number of industries, with 860 businesses, followed by retail trade, and the construction sector. There are no Mining businesses in the enterprise zone, and there is only one business in the management of companies and enterprises sector.

Figure 19: Number of Businesses (by NAICS) in the Enterprise Zone

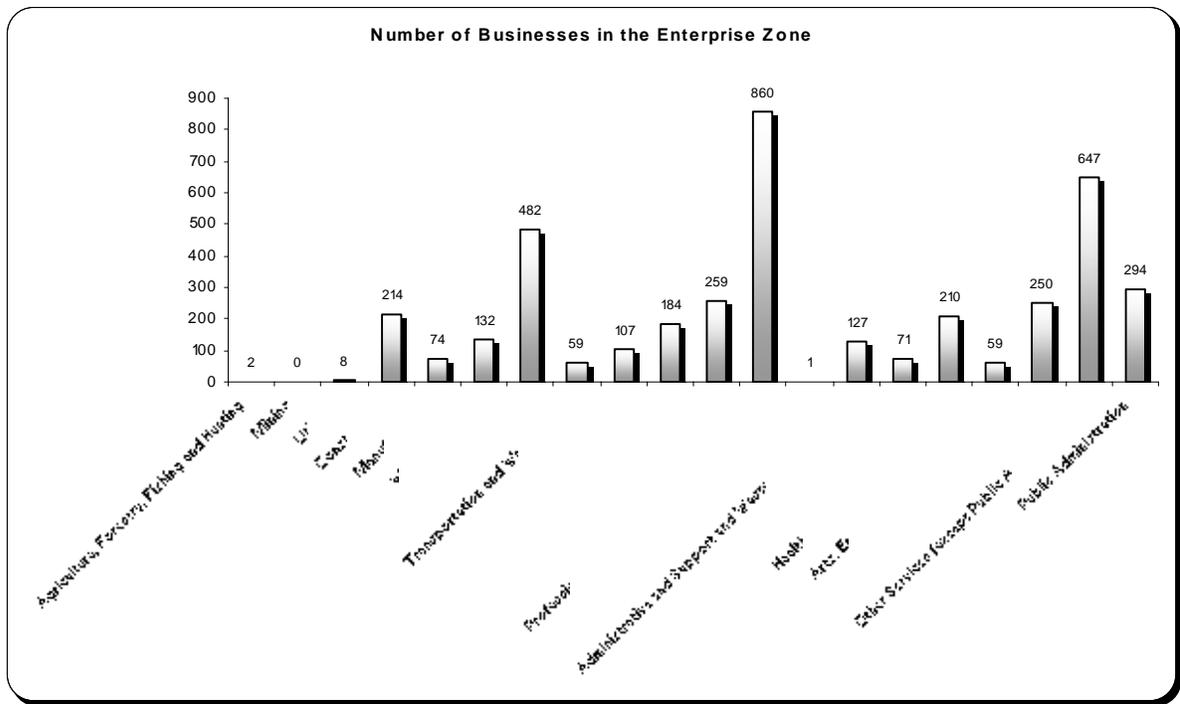


Table 72: Enterprise Zone Businesses by NAICS (2007)

NAICS Industry	NAICS	Number of Businesses
Agriculture, Forestry, Fishing and Hunting	11	2
Mining	21	0
Utilities	22	8
Construction	23	214
Manufacturing	31, 32, 33	74
Wholesale Trade	42	132
Retail Trade	44, 45	482
Transportation and Warehousing	48, 49	59
Information	51	107
Finance and Insurance	52	184
Real Estate and Rental and Leasing	53	259
Professional, Scientific, and Technical Services	54	860
Management of Companies and Enterprises	55	1
Administrative and Support and Waste Management and Remediation Services	56	127
Educational Services	61	71
Health Care and Social Assistance	62	210
Arts, Entertainment, and Recreation	71	59
Accommodation and Food Services	72	250
Other Services (except Public Administration)	81	647
Public Administration	92	294

Calculated by CEFA using WITS

The distribution of average sales and employment by NAICS, is shown below. In addition, the next figure shows that Wholesale Trade, Retail Trade and Arts, Entertainment, and Recreation are the highest with respect to sales volume.

Figure 20: Agriculture Businesses in the Enterprise Zone

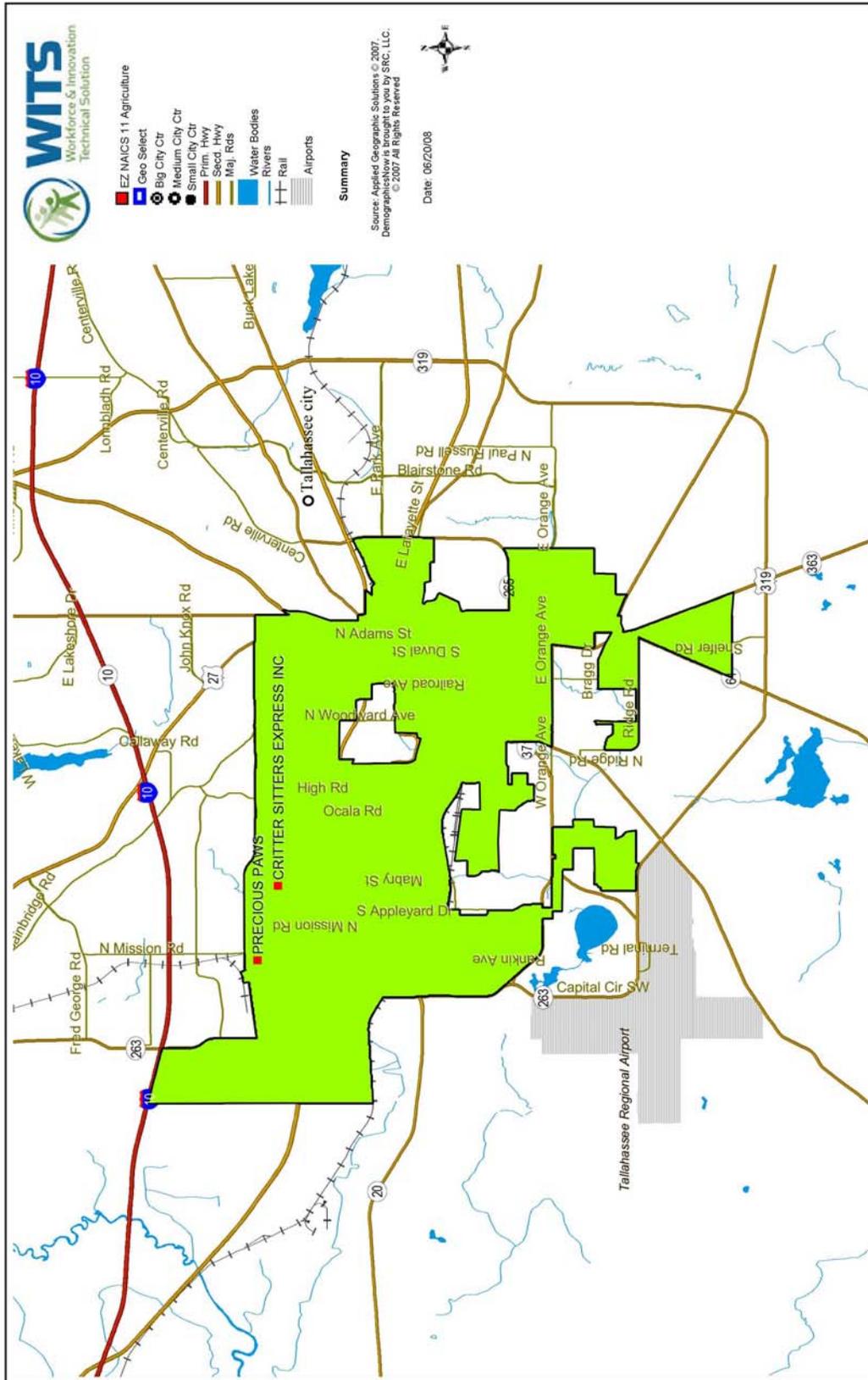


Figure 21: Utilities Businesses in the Enterprise Zone

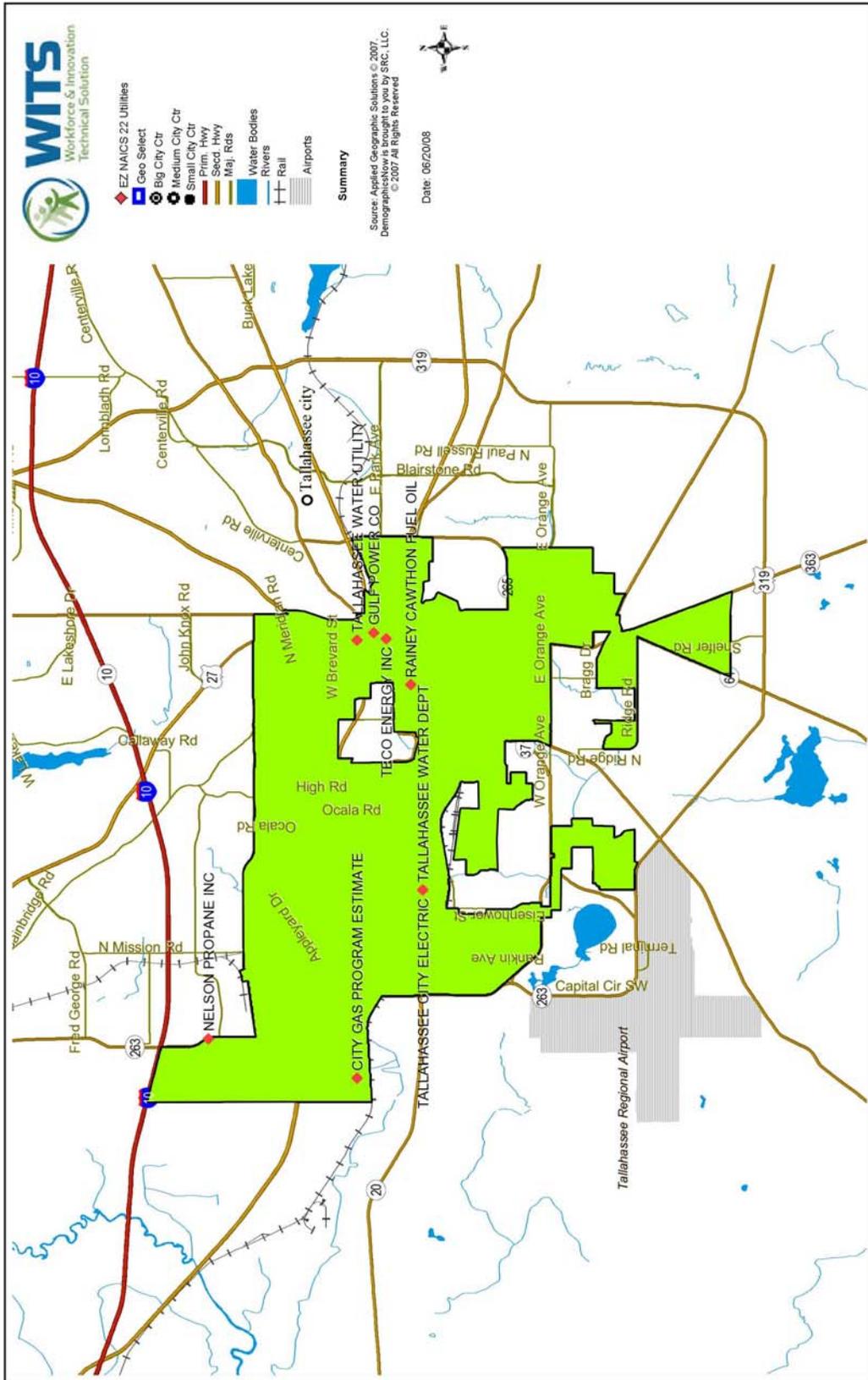


Figure 22: Construction Businesses in the Enterprise Zone

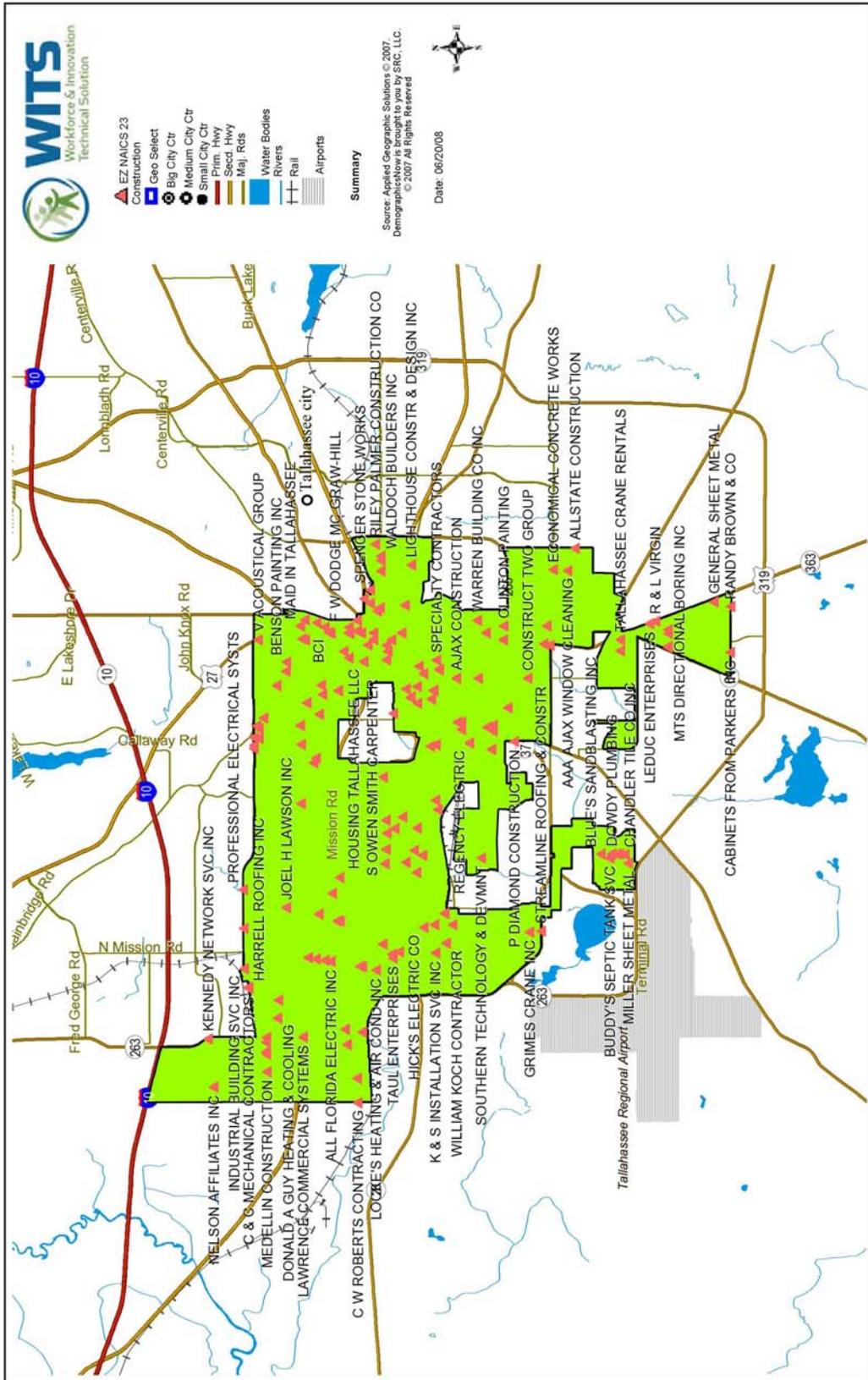


Figure 23: Manufacturing Businesses in the Enterprise Zone

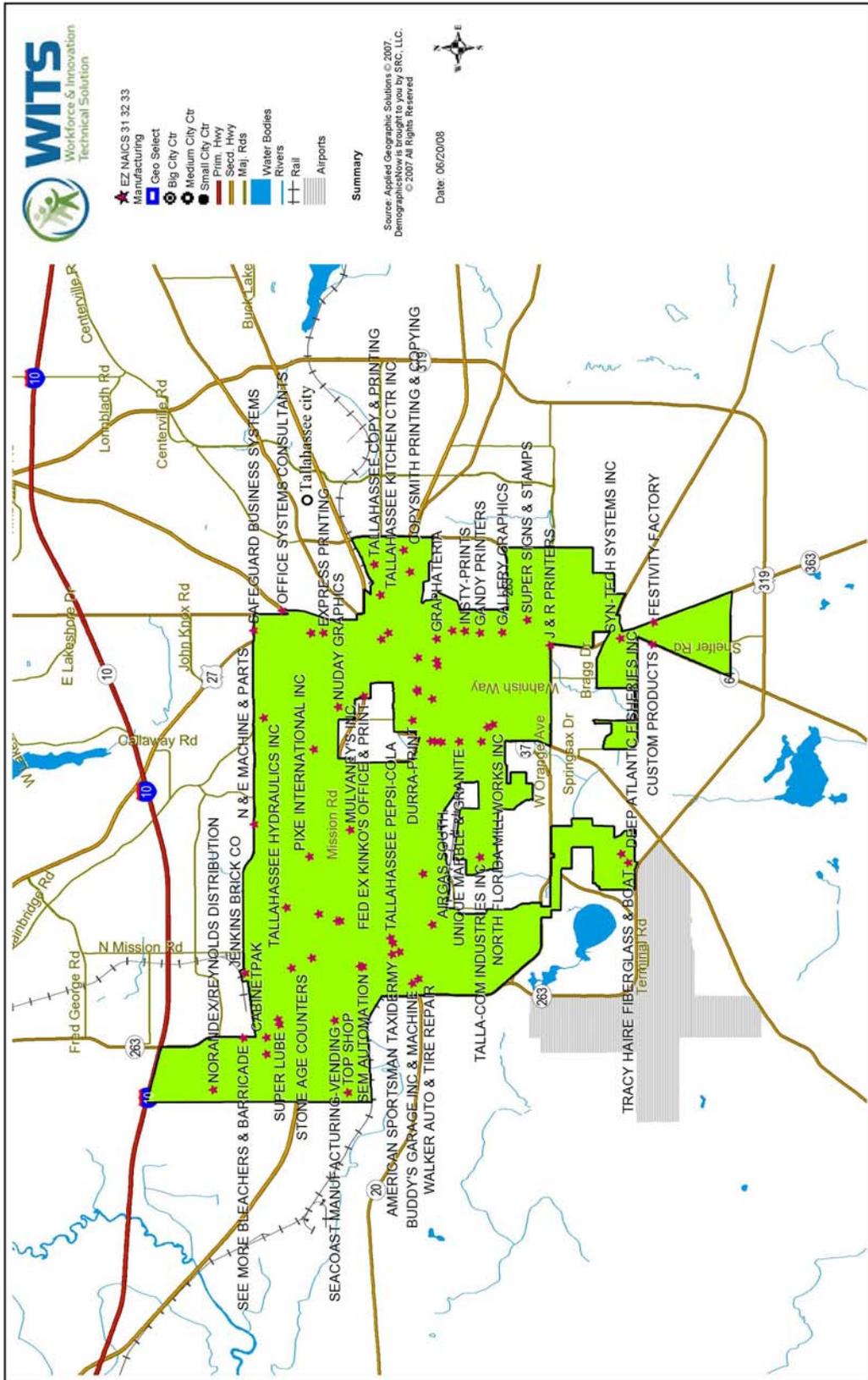


Figure 24: Wholesale Trade Businesses in the Enterprise Zone

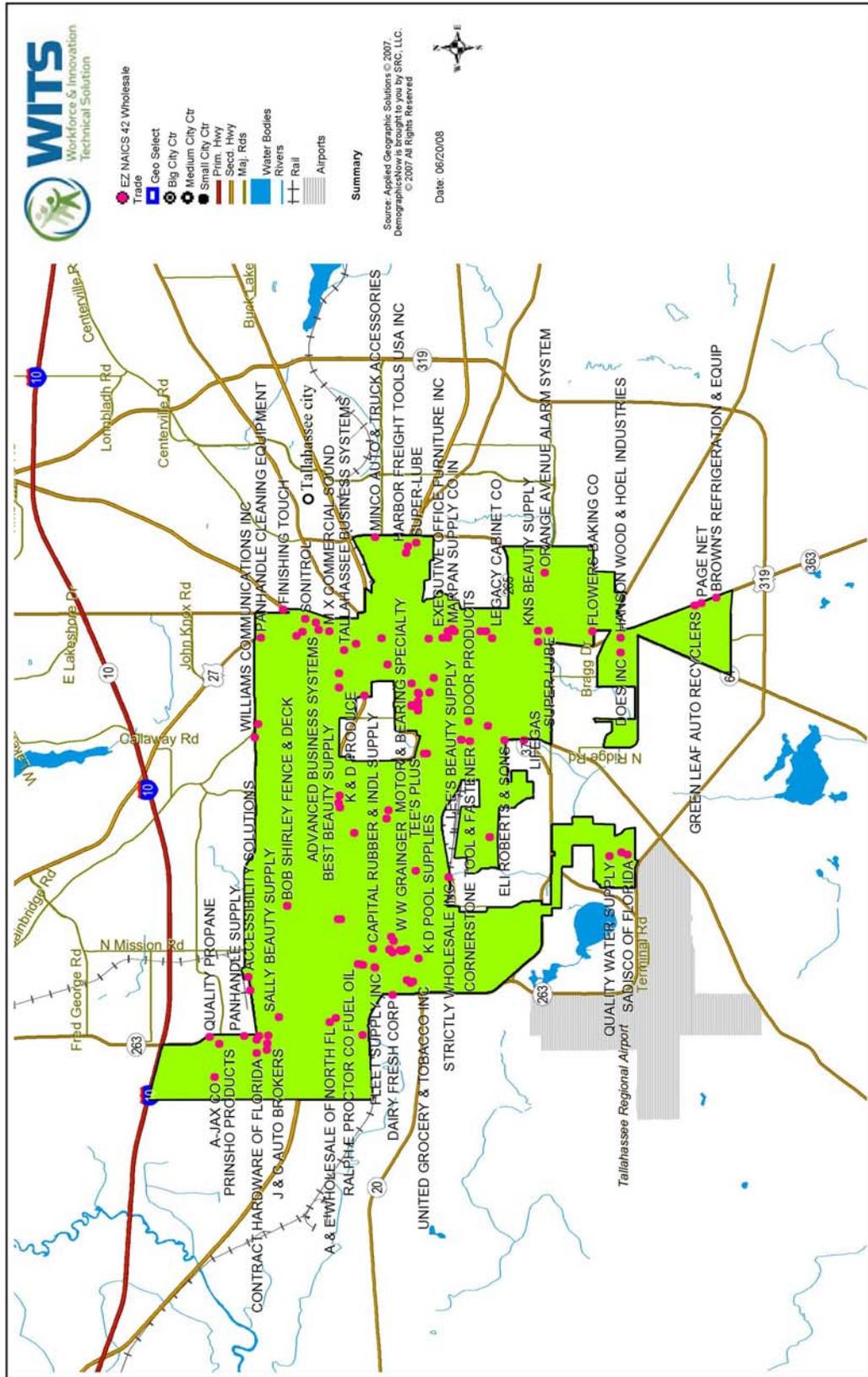


Figure 25: Retail Trade Businesses in the Enterprise Zone

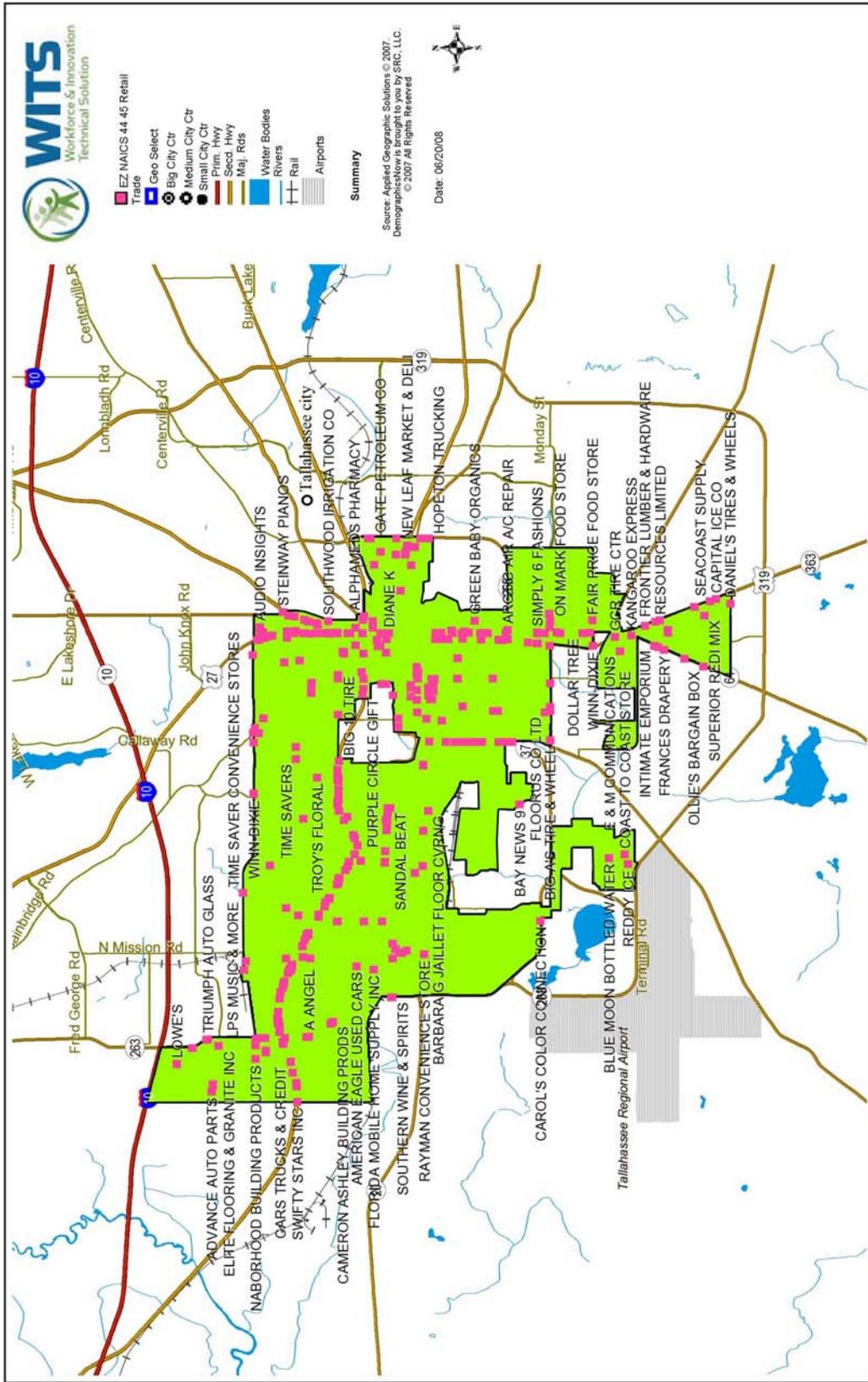


Figure 30: Professional, Scientific and Technical Services Businesses in the Enterprise Zone

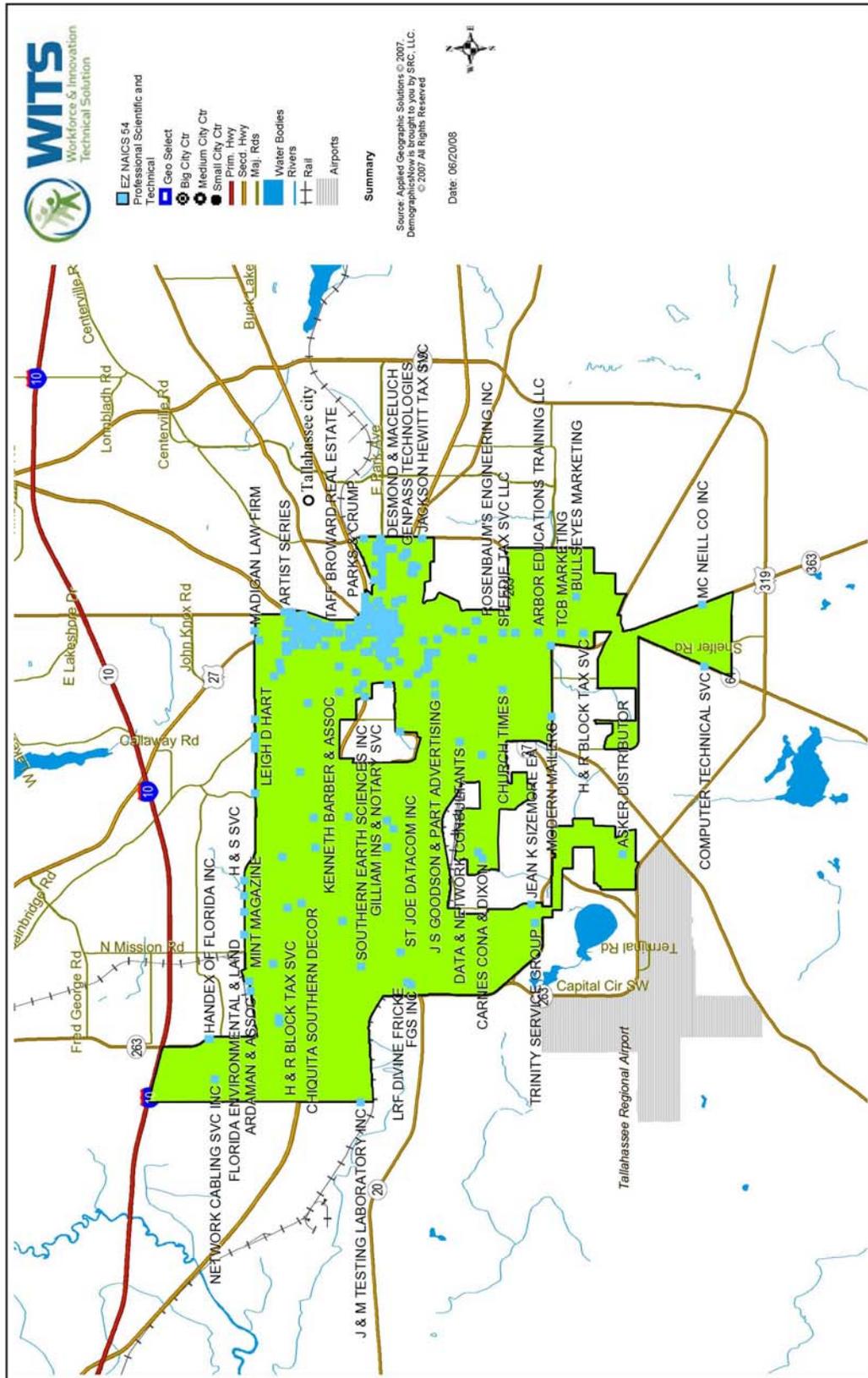


Figure 31: Management of Companies Businesses in the Enterprise Zone

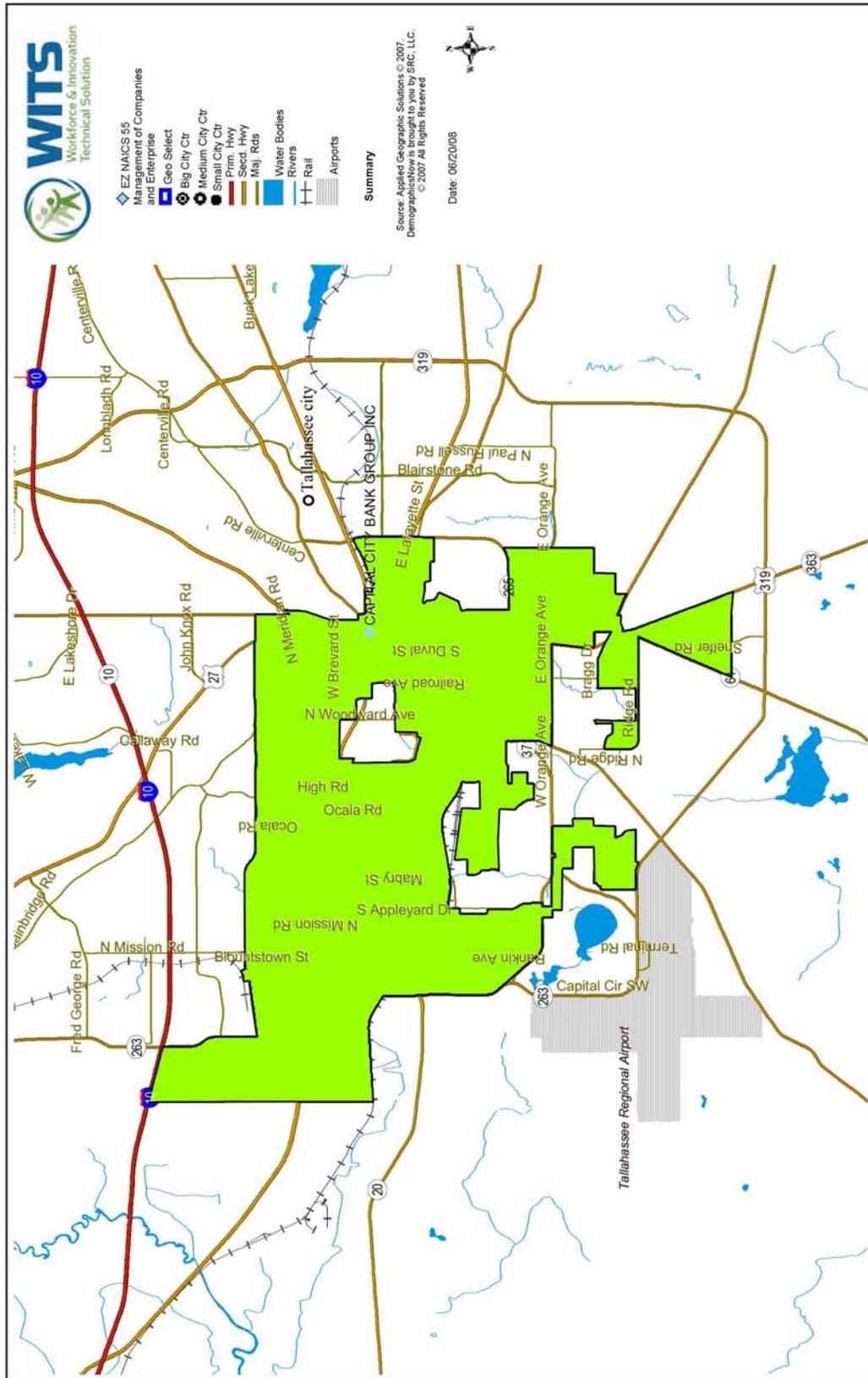


Figure 33: Educational Services Businesses in the Enterprise Zone

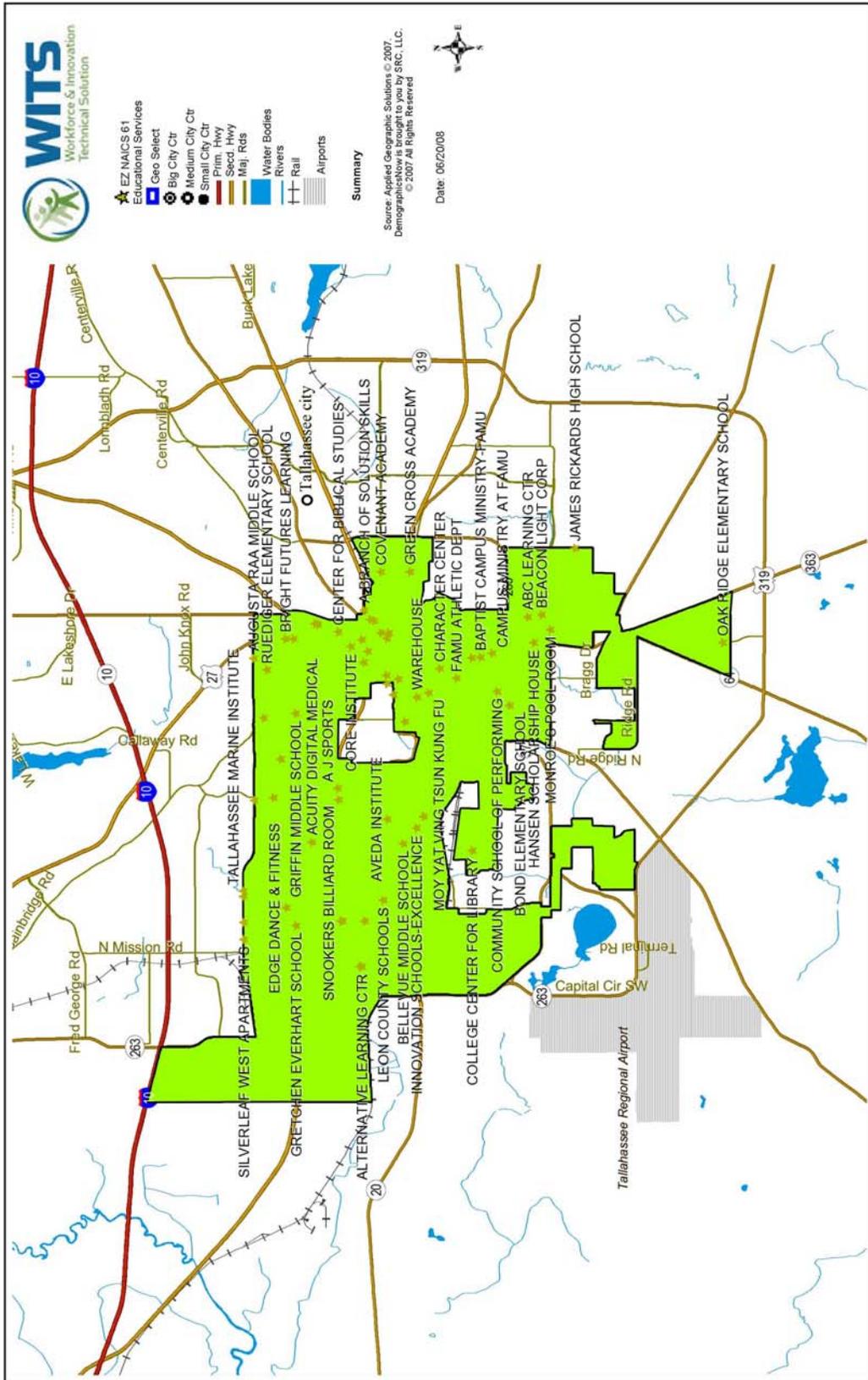
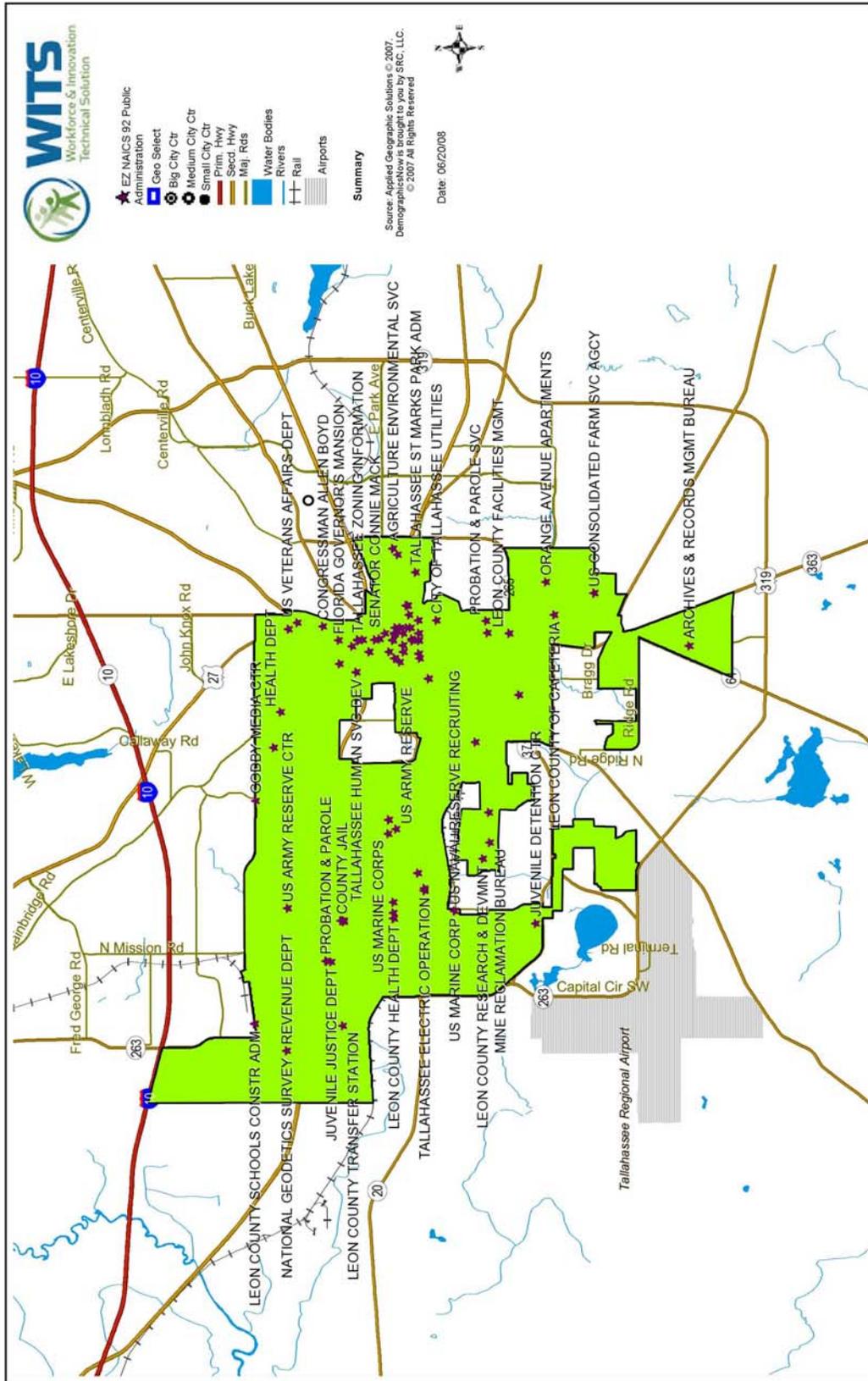


Figure 38: Public Administration Businesses in the Enterprise Zone



5.D.3 Gaines Street Area

5.D.3.1 Demographics

5.D.3.1.1 Population

In the year 2006, the population was 784. The 2000 Census showed a population of 862, and in the year 1990, it was 535 representing a 61.0% increase. It was estimated that the population will be 727 in the year 2011, representing a decrease of 7.2% from 2006. The population was 44.9% male and 55.1% female. The median age of the population was 23.2, compared to the US median age that was 36.5. The population density in the Gaines Street area was 986.6 people per square mile.

5.D.3.1.2 Households

In the year 2006, there were 432 households in the Gaines Street. The Census showed household counts of 488 in the year 2000, up from 532 in the year 1990, representing a decrease of 8.2%. It was estimated that the number of households will be 428 in the year 2011, a decrease of 0.9% from the year 2006. The average household size was 1.82 persons.

In the year 2006, the median number of years in residence was 1.71. The average household size was 1.03 people and the average family size was 2.41 people. The average number of vehicles per household in this geography was 1.2.

5.D.3.1.3 Income

In the year 2006, the median household income was \$10,802, compared to the US median that was \$48,271. The Census showed median household incomes of \$10,046 in the year 2000 and \$9,212 in the year 1990 representing an increase of 9.1%. It was estimated that the median household income will be \$11,412 in the year 2011, which would represent an increase of 5.6% from the year 2006.

In the year 2006, the per capita income was \$8,180, compared to the \$US per capita, which was \$24,529. The 2006 average household income was \$16,543, compared to the US average of \$63,629.

5.D.3.1.4 Race & Ethnicity

In the year 2006, the racial makeup was as follows: 57.1% White; 38.5% African American; 0.2% Native American; 2.2% Asian/Pacific Islander and 0.9% for

other races. This can be compared to the US racial makeup of 75.9% White, 12.1% African American, 0.7% Native American, 4.5% Asian/Pacific Islander and 4.5% Other.

People of Hispanic ethnicity are counted independently of race. People of Hispanic origin made up 6.3% of the year 2006 population, when compared to the US makeup of 14.9%.

5.D.3.1.5 Housing

The median housing value was \$36,588 in the year 1990; compared to the US median of \$78,382, for the same year. The 2000 Census median housing value was \$52,356, which was a 43.1% increase from 1990. In the year 1990, there were 98 owner occupied housing units vs. 75 in the year 2000. Also in the year 1990, there were 434 renter occupied housing units vs. 413 in the year 2000. The average rent in the year 1990 was \$274 vs. \$376 in the year 2000.

5.D.3.1.6 Employment

In the year 2006, there were 367 people over the age of 16 in the labor force. Of these, 80.1% were employed, 19.7% were unemployed, 42.3% were not in the labor force and 0.1% was in the Armed Forces. In the year 1990, unemployment was 8.7% and in the year 2000, it was 48.3%.

In the year 2006, there were 9,436 employees (daytime population) and there were 374 businesses.

For Gaines Street area in the year 1990, 63.4% of employees were employed in white-collar occupations and 36.6% were employed in blue-collar occupations. In the year 2000, white-collar workers made up 62.8% of the population, and those employed in blue-collar occupations made up 37.2%. In the year 1990, the average time traveled to work was 8 minutes, and in the year 2000, it was 14 minutes.

5.D.3.2 Business Listing by NAICS

The GIS analysis demonstrated that there were 269 businesses in Gaines Street strategic location. The distribution of these businesses in the year 2007 was as follows:

- ♦ 1 utility business
- ♦ 17 construction businesses
- ♦ 14 manufacturing businesses
- ♦ 18 wholesale trade businesses

- ♦ 43 retail trade businesses
- ♦ 6 transportation and warehousing businesses
- ♦ 8 information businesses
- ♦ 6 finance and insurance businesses
- ♦ 17 real estate and rental and leasing
- ♦ 19 professional, scientific, and technical services businesses
- ♦ 9 administrative, support, waste management and remediation services businesses
- ♦ 5 educational services businesses
- ♦ 5 health care and social assistance businesses
- ♦ 8 arts, entertainment, and recreation businesses
- ♦ 19 accommodation and food services businesses
- ♦ 51 other services (except public administration)
- ♦ 23 public administrations.

These businesses are shown on the map of this location after the table.

Table 73: Business Listing in Gaines Street Strategic Location (2007)

Company Name	Number of Employees	Sales Volume (\$000)	NAICS	Sector
Rainey Cawthon Fuel Oil	50 to 99	\$100,000 to 499,999	22121002	22
Benchmark Construction Inc	1 to 4	\$1 to 499	23611505	23
Brunette Construction	5 to 9	\$1,000 to 2,499	23816014	23
Burnette Construction	1 to 4	\$1 to 499	23816014	23
Culpepper Construction	20 to 49	\$20,000 to 49,999	23611505	23
Gld Mechanical	1 to 4	\$1 to 499	23821038	23
Karen Mack Tiles	1 to 4	\$1 to 499	23834005	23
Kone Inc	10 to 19	\$1,000 to 2,499	23829005	23
Leon Screening & Repairing Inc	10 to 19	\$1,000 to 2,499	23611825	23
Marlin Coating Inc	1 to 4	\$1 to 499	23832003	23
Morgan Electric Co	20 to 49	\$2,500 to 4,999	23821007	23
Orange State Construction	5 to 9	\$1,000 to 2,499	23611505	23
Pelican Woodworks	1 to 4	\$1 to 499	23835013	23
R & M Construction	1 to 4	\$1 to 499	23799012	23
Scott Burnett Inc-Mechanical	20 to 49	\$5,000 to 9,999	23821038	23
Specialty Contractors	20 to 49	\$2,500 to 4,999	23831001	23
Williams Concrete Construction	1 to 4	\$500 to 999	23811001	23
Winchester Construction	1 to 4	\$1 to 499	23611505	23
Deanne's Office & Computer	10 to 19	\$1,000 to 2,499	32311009	32
Durra-Print	20 to 49	\$2,500 to 4,999	32311908	32
Full Press Apparel Inc	10 to 19	\$1,000 to 2,499	32311301	32
Graphateria	20 to 49	\$5,000 to 9,999	32311009	32
Qwik Print & Bindery Of FI Inc	20 to 49	\$5,000 to 9,999	32311009	32
Auto Parts Warehouse	1 to 4	\$1,000 to 2,499	33639902	33
Bob's Barricades	1 to 4	\$1 to 499	33299916	33
Concepts In Design	1 to 4	\$1 to 499	33995008	33
Folsom Inc	1 to 4	\$500 to 999	33232204	33
Sauls Signs & Designs	1 to 4	\$1 to 499	33995008	33
Sign Professionals	1 to 4	\$1 to 499	33995008	33
Tallahassee Powder Coating	5 to 9	\$1,000 to 2,499	33281219	33
Tallahassee Welding & Machine	10 to 19	\$2,500 to 4,999	33271002	33
Unique Marble & Granite	5 to 9	\$1,000 to 2,499	33711004	33
Amoco Oil Products	5 to 9	\$20,000 to 49,999	42472018	42
Baker Distributing Co	5 to 9	\$2,500 to 4,999	42373003	42
Bumper To Bumper	5 to 9	\$2,500 to 4,999	42312015	42
Class A Electronic Llc	1 to 4	\$2,500 to 4,999	42369037	42
Ferguson Enterprises Inc	20 to 49	\$10,000 to 19,999	42372027	42
Fleet Supply Inc	10 to 19	\$5,000 to 9,999	42312065	42
Gramling's Inc	5 to 9	\$2,500 to 4,999	42491012	42
Ipw Of Tallahassee Inc	5 to 9	\$2,500 to 4,999	42312015	42
Lee's Beauty Supply	1 to 4	\$1,000 to 2,499	42385007	42

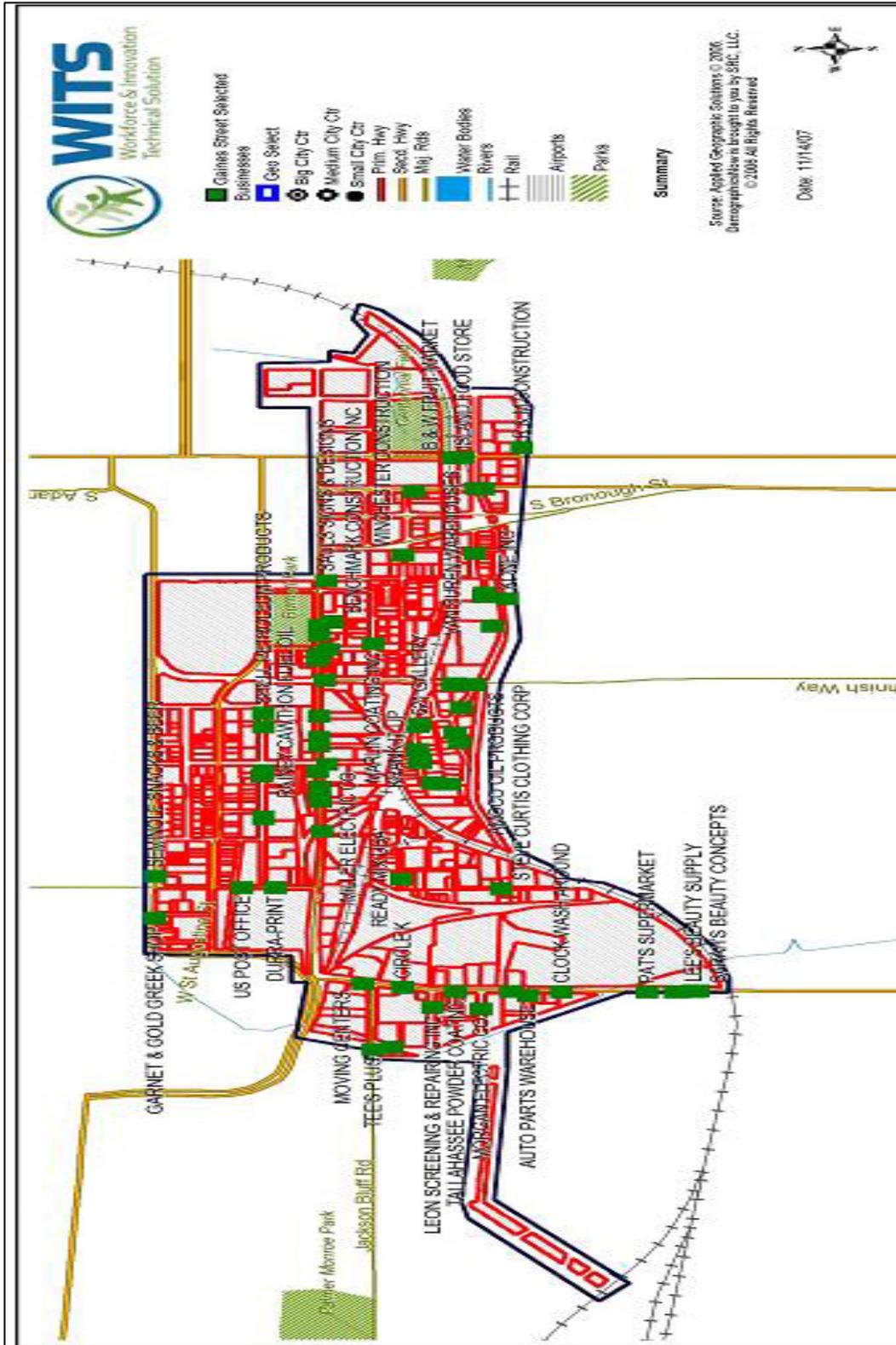
Company Name	Number of Employees	Sales Volume (\$000)	NAICS	Sector
Miller Electric Co	1 to 4	\$1,000 to 2,499	42361015	42
Motor & Bearing Specialty	10 to 19	\$10,000 to 19,999	42361023	42
Oscar G Carlstedt Co	10 to 19	\$2,500 to 4,999	42493006	42
Rainey Cawthon Distr Inc	20 to 49	\$10,000 to 19,999	42472014	42
Rsc Equipment Rental	10 to 19	\$5,000 to 9,999	42381002	42
Sarah's Beauty Concepts	1 to 4	\$1,000 to 2,499	42385007	42
Tallahassee Moulding & Millwk	5 to 9	\$2,500 to 4,999	42331031	42
Tee's Plus	1 to 4	\$500 to 999	42385007	42
Tri-States Automotive	5 to 9	\$2,500 to 4,999	42312015	42
A 1 Parts & Performance Inc	5 to 9	\$2,500 to 4,999	44122108	44
Allbrand Stereo	1 to 4	\$1,000 to 2,499	44311221	44
American Telephone Co	10 to 19	\$2,500 to 4,999	44311207	44
B & W Fruit Market	1 to 4	\$500 to 999	44523003	44
Capital Cash & Carry Inc	5 to 9	\$1,000 to 2,499	44411001	44
Circle K	5 to 9	\$1,000 to 2,499	44512001	44
Clock Wash Around	1 to 4	\$1 to 499	44831003	44
Ferguson Bath & Kitchen Gllry	20 to 49	\$5,000 to 9,999	44229947	44
Florida Southern Plywood Corp	1 to 4	\$1,000 to 2,499	44419054	44
Furrin Auto Parts Warehouse	5 to 9	\$1,000 to 2,499	44131011	44
Gaines Street Shell	5 to 9	\$1,000 to 2,499	44512001	44
Garnet & Gold Greek Shop	10 to 19	\$1,000 to 2,499	44819026	44
Glass Doctor	10 to 19	\$1,000 to 2,499	44419031	44
House Of Plywood	1 to 4	\$1,000 to 2,499	44419054	44
Island Food Store	5 to 9	\$1,000 to 2,499	44512001	44
J H Dowling Inc	20 to 49	\$2,500 to 4,999	44411001	44
Margo's Balloons Baskets	5 to 9	\$500 to 999	44812002	44
Pat's Supermarket	5 to 9	\$1,000 to 2,499	44511003	44
Ready Mix Usa	20 to 49	\$5,000 to 9,999	44419012	44
Romac Lumber & Supply Inc	20 to 49	\$5,000 to 9,999	44419044	44
Seminole Snacks & Beer	1 to 4	\$1 to 499	44512001	44
Shell Petroleum Products	5 to 9	\$2,500 to 4,999	44719005	44
Stereo Sales Inc	10 to 19	\$1,000 to 2,499	44131013	44
Steve Curtis Clothing Corp	1 to 4	\$1 to 499	44814001	44
Telephone Co	10 to 19	\$2,500 to 4,999	44311223	44
621 Gallery	1 to 4	\$1 to 499	45392002	45
Amen-Ra's Bookshop	1 to 4	\$500 to 999	45121105	45
Avant-Garb	1 to 4	\$1 to 499	45331046	45
Cd Warehouse	1 to 4	\$1 to 499	45122001	45
Cosmic Cat Comics & Games	1 to 4	\$1 to 499	45121108	45
E T Ceterrocks	1 to 4	\$1 to 499	45112033	45
Krank It Up	1 to 4	\$1 to 499	45111008	45
Other Side	1 to 4	\$1 to 499	45331046	45
Pelican Place	1 to 4	\$500 to 999	45392002	45
Phaze One	1 to 4	\$1 to 499	45111044	45
Plywood Sculpture	1 to 4	\$500 to 999	45392002	45
Railroad Square Artist Studios	1 to 4	\$500 to 999	45392002	45
Really Knit Stuff	1 to 4	\$1 to 499	45113024	45
Reaver Enterprises	1 to 4	\$500 to 999	45112011	45
Sick Boy Vintage	1 to 4	\$1 to 499	45331046	45
University Cycles-Tallahassee	1 to 4	\$500 to 999	45111006	45
Waxed Out Candles	1 to 4	\$1 to 499	45322013	45
Wooly Bully	1 to 4	\$1 to 499	45112011	45
Hall's Airfreight & Delivery	1 to 4	\$1 to 499	48411004	48
Moving Centers	5 to 9	\$1 to 499	48411009	48
Roadway Express Inc	5 to 9	\$1,000 to 2,499	48423017	48
Railroad Square Art Park	1 to 4	\$1 to 499	49311009	49
Us Post Office	5 to 9		49111001	49
Van Buren Warehouses	20 to 49	\$2,500 to 4,999	49311009	49
Abortion Information	5 to 9	\$500 to 999	51919018	51
Alltel	1 to 4	\$1,000 to 2,499	51721201	51
Audio Labs	10 to 19	\$1,000 to 2,499	51821013	51
Dept Of Banking Legal Library	20 to 49		51912011	51

Company Name	Number of Employees	Sales Volume (\$000)	NAICS	Sector
Instructional Television	10 to 19		51512001	51
Telephone Systems Inc	10 to 19	\$2,500 to 4,999	51711006	51
Tri-Tech Communications Inc	10 to 19	\$2,500 to 4,999	51711006	51
Wjzt	1 to 4	\$1 to 499	51511203	51
B B & T	5 to 9		52211002	52
Bank Of America	10 to 19		52211002	52
Florida Commerce Credit Union	5 to 9	\$1,000 to 2,499	52213003	52
Florida State University Cu	10 to 19	\$1,000 to 2,499	52213003	52
Leo Young Insurance	1 to 4	\$1 to 499	52421001	52
Quality Insurance	1 to 4	\$500 to 999	52421001	52
American Audio Visual	1 to 4	\$1 to 499	53221003	53
Cornerstone Realty	5 to 9	\$500 to 999	53121003	53
Eagle Equipment & Scaffolding	1 to 4	\$500 to 999	53249010	53
Estate Liquidators	1 to 4	\$1 to 499	53131112	53
Ideal Estates Realty	5 to 9	\$500 to 999	53121003	53
Kingston Square	1 to 4	\$500 to 999	53111002	53
Melton Chip Apartments	1 to 4	\$500 to 999	53111002	53
Mouse Properties	1 to 4	\$1 to 499	53121003	53
P 3 Llc	1 to 4	\$1 to 499	53121003	53
P3 Management	1 to 4	\$500 to 999	53121005	53
Penwood Apartments	1 to 4	\$500 to 999	53111002	53
Portland Terrace Apartments	1 to 4	\$500 to 999	53111002	53
Southern Furniture Leasing	5 to 9	\$500 to 999	53229921	53
Southgate Apartments	1 to 4	\$1 to 499	53111002	53
Spirit Realty Inc	1 to 4	\$1 to 499	53121003	53
Star Lite Realty	1 to 4	\$1 to 499	53121003	53
U-Haul Co	1 to 4	\$500 to 999	53212016	53
CDP	5 to 9	\$1,000 to 2,499	54133052	54
Crown Communications	1 to 4	\$500 to 999	54161814	54
David Mccord Photo	1 to 4	\$1 to 499	54192204	54
Denmark's Photography	1 to 4	\$1 to 499	54192204	54
Excel Decorators Inc	1 to 4	\$1 to 499	54141003	54
Famos Llc	1 to 4	\$1 to 499	54161401	54
Gilchrist Ross Crowe	5 to 9	\$1,000 to 2,499	54131001	54
Graphic Visions	1 to 4	\$1 to 499	54143006	54
Huffman/Tarmey Architecture	5 to 9	\$1,000 to 2,499	54131001	54
Huffman/Tarmey Architecture	1 to 4	\$500 to 999	54131001	54
J S Goodson & Part Advertising	1 to 4	\$500 to 999	54181001	54
Jadis Graphics	1 to 4	\$1 to 499	54143006	54
James B Meyer	1 to 4	\$1 to 499	54111002	54
Mateo Design Group	1 to 4	\$1 to 499	54141003	54
Q P Publishing	20 to 49	\$2,500 to 4,999	54151102	54
Railroad Square Ind Park	1 to 4	\$1 to 499	54121903	54
State Sports Publishing	1 to 4	\$500 to 999	54161102	54
Wilderness Graphics	20 to 49	\$2,500 to 4,999	54143006	54
Wood & Partners Inc	10 to 19	\$1,000 to 2,499	54132004	54
Americas Carpet & Upholstery	50 to 99	\$5,000 to 9,999	56174001	56
Associated Services & Supplies	50 to 99	\$2,500 to 4,999	56172001	56
Canopy Roads Management Inc	1 to 4	\$1 to 499	56111023	56
Elm Management Group	1 to 4	\$1 to 499	56111022	56
Guardsmark Inc	1 to 4	\$1 to 499	56161208	56
Lang Environmental Inc	5 to 9	\$500 to 999	56291001	56
Patterson JC Real Est Broker	1 to 4	\$1 to 499	56199017	56
Step One Temp Emplmnt & Trng	1 to 4	\$1 to 499	56131005	56
Trojan Labor	1 to 4	\$1 to 499	56132001	56
Center-Professional Development	20 to 49		61131009	61
Character Center	1 to 4	\$500 to 999	61171012	61
Florida State Univ Intramural	10 to 19		61131009	61
Moy Yat Ving Tsun Kung Fu	1 to 4	\$1 to 499	61162014	61
Warehouse	10 to 19	\$1,000 to 2,499	61162003	61
A Women's Pregnancy Ctr	5 to 9	\$1 to 499	62141005	62
Capital Support Svc Inc	5 to 9		62419012	62

Company Name	Number of Employees	Sales Volume (\$000)	NAICS	Sector
Community Chiropractic Ctr	1 to 4	\$1 to 499	62131002	62
Echo Outreach Ministries	5 to 9		62419012	62
Family Tree A Lesbian Gay Ctr	5 to 9		62419012	62
Florida State University	1,000 to 4,999	\$500,000 to 999,999	71111007	71
J & H Music Co Inc	1 to 4	\$1 to 499	71312003	71
Mickee Faust Club	1 to 4	\$500 to 999	71111007	71
Tallahassee Leon County Civic	500 to 999	\$100,000 to 499,999	71131003	71
Tallahassee Music & Amusement	1 to 4	\$1 to 499	71312003	71
Tallahassee Rock Gym	1 to 4	\$1 to 499	71394011	71
Tallahassee Titaln	20 to 49	\$5,000 to 9,999	71121102	71
Wigwam Vending Inc	1 to 4	\$1 to 499	71312003	71
All Saints Cafe Llc	5 to 9	\$1 to 499	72221305	72
Bandidos Burritos	1 to 4	\$1 to 499	72221105	72
Beta Bar	1 to 4	\$1 to 499	72241006	72
Centre Catering	250 to 499	\$10,000 to 19,999	72232001	72
Church's Chicken	10 to 19	\$500 to 999	72221105	72
Fat Sandwich	1 to 4	\$1 to 499	72221105	72
Heavenley Catering	1 to 4	\$1 to 499	72232001	72
Mc Donald's	20 to 49	\$1,000 to 2,499	72221105	72
Palace Saloon	10 to 19	\$500 to 999	72241001	72
Popeye's Chicken & Biscuits	20 to 49	\$500 to 999	72221105	72
Renaissance Coffee & Tea Co	1 to 4	\$1 to 499	72221105	72
Savannah's Country Buffet	1 to 4	\$1 to 499	72221105	72
Shell Oyster Bar	5 to 9	\$1 to 499	72221105	72
Simmer Down Island Cafe	1 to 4	\$1 to 499	72221105	72
Spotlight Grille	20 to 49	\$1,000 to 2,499	72221105	72
St Michael's Pub	1 to 4	\$1 to 499	72241001	72
Subway Sandwiches & Salads	10 to 19	\$1 to 499	72221105	72
Subway Sandwiches & Salads	20 to 49	\$1,000 to 2,499	72221105	72
Whataburger	20 to 49	\$1,000 to 2,499	72221105	72
Ace Of Florida Inc	5 to 9		81391002	81
Action Auto Repair	1 to 4	\$1 to 499	81111104	81
Ahmed Trenadier Club	1 to 4		81341002	81
Ben Beldock Massage Therapist	1 to 4	\$1 to 499	81219908	81
Bob's Auto Repair	5 to 9	\$500 to 999	81111104	81
Buddy's Garage Inc	1 to 4	\$1 to 499	81111104	81
California Nails	1 to 4	\$1 to 499	81211302	81
Campus Radiator	1 to 4	\$1 to 499	81111807	81
Capital City Collision Ctr	5 to 9	\$500 to 999	81112102	81
Carrerasports Inc	1 to 4	\$1 to 499	81111104	81
Centerpoint Church	1 to 4		81311008	81
Cinquefoil Lymphedema Therapy	1 to 4	\$1 to 499	81219908	81
City Side Car Grooming Svc	1 to 4	\$1 to 499	81119208	81
Cleo's Garage	1 to 4	\$1 to 499	81111104	81
Colour Diva	1 to 4	\$1 to 499	81211202	81
Computers First	1 to 4	\$1 to 499	81121206	81
Debonair Hair Salon	1 to 4	\$1 to 499	81211202	81
Euphoria	1 to 4	\$1 to 499	81299030	81
First Impression Furniture Rpr	1 to 4	\$1 to 499	81142006	81
First Impression Furniture Rpr	1 to 4	\$1 to 499	81142006	81
Florida Consumer Action Ntwrk	1 to 4		81341018	81
Florida Prosecuting Attorneys	5 to 9		81341018	81
Garrett's Hair Salon	1 to 4	\$1 to 499	81211202	81
Happytown Coin Laundry	1 to 4	\$1 to 499	81232001	81
Hillel Foundation Jewish	1 to 4		81311026	81
Islamic Center Of Tallahassee	1 to 4		81311021	81
Jeff's Paint & Body Shop	1 to 4	\$1 to 499	81112102	81
John's & Son Auto Repair Inc	1 to 4	\$1 to 499	81111104	81
Maner Garage	1 to 4	\$1 to 499	81111104	81
Ms Tu Tu's	1 to 4	\$1 to 499	81211202	81
New Radiators Cheap	1 to 4	\$1 to 499	81111807	81
Perry's Lounge	1 to 4		81341004	81

Company Name	Number of Employees	Sales Volume (\$000)	NAICS	Sector
Pilgrim Rest Baptist Church	1 to 4		81311008	81
Planet Gumbo Inc	1 to 4		81341018	81
Pro Cycle	1 to 4	\$1 to 499	81131027	81
Professional Automotive Ctr	1 to 4	\$1 to 499	81111104	81
Ransom's Upholstery & Tv Rpr	1 to 4	\$1 to 499	81121117	81
Reeves Welding Inc	1 to 4	\$1 to 499	81149058	81
Second Chance Outreach	1 to 4		81311008	81
Seminole Barber Shop	1 to 4	\$1 to 499	81211101	81
Shear Image Barber & Beauty	5 to 9	\$1 to 499	81211101	81
Sherman's Furniture Rfnshng	1 to 4	\$1 to 499	81142006	81
Stewardship Drycleaners	1 to 4	\$1 to 499	81232002	81
Strick's Auto & Truck Repair	1 to 4	\$1 to 499	81111104	81
Tommy's Auto Repair	1 to 4	\$1 to 499	81111104	81
True Fellowship Holiness Chr	1 to 4		81311008	81
University Barber Shop	1 to 4	\$1 to 499	81211101	81
University Laundry Mat	1 to 4	\$1 to 499	81232001	81
Wash Around The Clock	1 to 4	\$1 to 499	81232001	81
What's The Point	1 to 4	\$1 to 499	81299005	81
World Class Hair Salon Inc	1 to 4	\$1 to 499	81211302	81
Banking & Finance Dept	500 to 999		92113005	92
Banking Dept	10 to 19		92615004	92
Bureau Of Notaries	5 to 9		92112008	92
City Of Tallahassee Utilities	5 to 9		92613001	92
Consumer Services Div			92615004	92
Corporate Records	100 to 249		92119006	92
Education Dept	20 to 49		92311004	92
Education For Exceptional	100 to 249		92311004	92
Finance Division	50 to 99		92113005	92
Financial Regulation	5 to 9		92112008	92
Florida Department-Financial	500 to 999		92112008	92
Information Systems Div	100 to 249		92613004	92
Legal Affairs Dept	500 to 999		92112008	92
Leon County Civic Ctr	5 to 9		92119002	92
Leon County Community Dev Dept	5 to 9		92512002	92
Leon County Election Warehouse	1 to 4		92112007	92
Leon County Housing Dept	5 to 9		92112007	92
Leon County Veterans Svc	1 to 4		92112007	92
Leon County Veterans Svc Dept	1 to 4		92112007	92
Leon County Volunteer Ctr	5 to 9		92112007	92
Securities & Finance Div	500 to 999		92113005	92
Treasurer Dept			92113005	92
Us Commerce Dept	5 to 9		92611003	92

Figure 39: Businesses on Gaines Street



5.D.4 The Frenchtown Area

5.D.4.1 Demographics

5.D.4.1.1 Population

In the year 2006, the population was 3,431. The 2000 Census showed a population of 3,466, and in the year 1990, it was 3,515, representing a 1.4% decrease. It was estimated that the population will be 3,401 in the year 2011, representing a decrease of 0.9% from 2006. The population was 51.9% male and 48.1% female. In the year 2006, the median age of the population was 30.8, compared to the US median age, which was 36.5. The population density was 4,558.2 people per square mile.

5.D.4.1.2 Households

In the year 2006, there were 1,512 households in the Frenchtown area. The Census showed household counts of 1,598 in the year 2000, up from 1,680 in the year 1990, representing a decrease of 4.9%. It was estimated that the number of households will be 1,574 in the year 2011, representing an increase of 4.1% from the year 2006. The average household size was 2.27 persons.

In the year 2006, the median number of years in residence in this geography's population was 2.13. The average household size was 2.15 people and the average family size was 3.35 people. The average number of vehicles per household was 1.3.

5.D.4.1.3 Income

In the year 2006, the median household income was \$14,650, compared to the US median that was \$48,271. The Census showed median household incomes of \$14,185 in the year 2000 and \$9,353 in the year 1990 representing an increase of 51.7%. It was estimated that the median household income will be \$15,092 in the year 2011, which would represent an increase of 3.0% from the year 2006.

In the year 2006, the per capita income was \$13,210, compared to the \$US per capita, which was \$24,529. The 2006 average household income was \$26,116, compared to the US average of \$63,629.

5.D.4.1.4 Race & Ethnicity

In the year 2006, the racial makeup was as follows: 30.1% White; 65.6% African American; 0.2% Native American; 1.8% Asian/Pacific Islander, and 0.7% other. This can be compared to the US racial makeup which was 75.9% White, 12.1% African American, 0.7% Native American, 4.5% Asian/Pacific Islander and 4.5% Other.

People of Hispanic ethnicity are counted independently of race. People of Hispanic origin made up 3.9% of the year 2006 population when compared to the US makeup of 14.9%. Changes in the population within each race and ethnicity category from the 1990 Census to the 2000 Census were as follows: 27.9% American Indian, Eskimo, Aleut Population; 0.3% Asian, Pacific Islander; -2.8% African American; 15.3% Hispanic Ethnicity; 43.3% Other; White -5.4%.

5.D.4.1.5 Housing

The median housing value was \$36,700 in the year 1990; compared to the US median of \$78,382 for the same year. The 2000 Census median housing value was \$56,190, which was a 53.1% increase from 1990. In the year 1990, there were 475 owner occupied housing units vs. 446 in the year 2000. Also in the year 1990, there were 1,205 renter occupied housing units vs. 1,152 in the year 2000. The average rent in the year 1990 was \$256 vs. \$379 in the year 2000.

5.D.4.1.6 Employment

In the year 2006, there were 1,668 people over the age of 16 in the labor force . Of these 92.3% were employed, 7.7% were unemployed, 42.0% were not in the labor force and 0.0% were in the Armed Forces. In the year 1990, unemployment was 13.4% and in the year 2000, it was 18.0%.

In the year 2006, there were 1,830 employees (daytime population) and there were 199 establishments.

In the year 1990, 51.7% of employees were employed in white-collar occupations and 48.3% were employed in blue-collar occupations. In the year 2000, white-collar workers made up 56.7% of the population, and those employed in blue-collar occupations made up 43.3%. In the year 1990, the average time traveled to work was 8 minutes and in the year 2000, it was 18 minutes.

5.D.4.2 Business listing by NAICS

The next table shows the businesses in the area. The definition of sectors by NAICS is detailed later in the enterprise zone section. The sector of the businesses (NAICS code) is specified in the last column of the table.

Table 74: Business Listing in Frenchtown Strategic Location (2007)

Company Name	Number of Employees	Sales Volume (\$000)	NAICS Code	Sector
Billy Owens General Contractor	5 to 9	\$1,000 to 2,499	23611505	23
Dri Coat Waterproofing Cnslt	5 to 9	\$500 to 999	23839004	23
Florida Developers/General	20 to 49	\$10,000 to 19,999	23611505	23
Housing Tallahassee Llc	1 to 4	\$1,000 to 2,499	23721005	23
Jim Lambert Construction	10 to 19	\$2,500 to 4,999	23611505	23
Pour Guys Concrete Inc	5 to 9	\$500 to 999	23811001	23
Rollins' Chemicals-Janitorial	1 to 4	\$1 to 499	23899059	23
Sheffield Construction Co Inc	1 to 4	\$1,000 to 2,499	23611505	23
United Contracted Svc	1 to 4	\$1 to 499	23811001	23
Fed Ex Kinko's Office & Print	5 to 9	\$1,000 to 2,499	32311009	32
Nuday Graphics	1 to 4	\$500 to 999	32311009	32
Hair & More Inc	1 to 4	\$1,000 to 2,499	42385007	42
Integrated Facility Systems	10 to 19	\$5,000 to 9,999	42321003	42
Superlube	1 to 4	\$10,000 to 19,999	42472017	42
Tallahassee Business Systems	1 to 4	\$500 to 999	42342020	42
B & B Tires	1 to 4	\$1 to 499	44132001	44
Custom Auto Sound	1 to 4	\$1 to 499	44311221	44
Doug's Lamp & Shade	5 to 9	\$1,000 to 2,499	44229942	44
Doug's Vacuum Ctr	5 to 9	\$1,000 to 2,499	44311126	44
Economy Drug Store	1 to 4	\$1 to 499	44611009	44
Fourth Avenue Super Market	5 to 9	\$1,000 to 2,499	44511003	44
Glass Service Ctr-Tallahassee	5 to 9	\$1,000 to 2,499	44419031	44
Lander's Fashions	1 to 4	\$1 to 499	44812010	44
Mays-Munroe Inc	5 to 9	\$1,000 to 2,499	44311104	44
Mike's Liquor & Beer Barn	1 to 4	\$500 to 999	44531004	44
Randolph Alteration Shop	5 to 9	\$500 to 999	44819001	44
Sleep On It Bedding	1 to 4	\$500 to 999	44211003	44
Time Saver Convenience Store	1 to 4	\$500 to 999	44512001	44
Time Saver Convenience Store	5 to 9	\$1,000 to 2,499	44512001	44
Ashmore's Antiques	1 to 4	\$1 to 499	45331001	45
Family Dollar Store	5 to 9	\$500 to 999	45299013	45
Florida Coffee Svc Inc	1 to 4	\$500 to 999	45439002	45
Lamplighter Antiques	5 to 9	\$500 to 999	45331001	45
Muse 3	1 to 4	\$1 to 499	45322013	45
Purple Circle Gift	1 to 4	\$1 to 499	45322013	45
Rick's Toy Box	5 to 9	\$1,000 to 2,499	45122004	45
Mind Productions & Assoc	1 to 4	\$500 to 999	51113003	51
Cash Register Auto Insurance	1 to 4	\$500 to 999	52421001	52
Cornucopia Tax Svc	5 to 9	\$1,000 to 2,499	52393005	52
Mike's Pawn Shop	1 to 4	\$1 to 499	52229813	52
Quick Bail Bonds	1 to 4	\$1,000 to 2,499	52412609	52
Western Union	1 to 4	\$1,000 to 2,499	52232010	52
Bethel Towers	1 to 4	\$500 to 999	53111002	53
Big Bend Rental Ctr	1 to 4	\$1 to 499	53249002	53
Canopy Roads Management Inc	1 to 4	\$1 to 499	53121005	53
Carolina Square Apartments	1 to 4	\$500 to 999	53111002	53
Party Center	5 to 9	\$500 to 999	53229932	53
Rental Center	5 to 9	\$1,000 to 2,499	53231003	53
Savannahs	1 to 4	\$500 to 999	53111002	53
Seminole Oaks Apartment	20 to 49	\$2,500 to 4,999	53111002	53
University Lofts Apartments	1 to 4	\$500 to 999	53111002	53
Akbar Consultants	1 to 4	\$1 to 499	54161401	54

Company Name	Number of Employees	Sales Volume (\$000)	NAICS Code	Sector
Barbara's Custom Drapery	1 to 4	\$1 to 499	54141003	54
Cummings Hobbs & Wallace	1 to 4	\$1 to 499	54111002	54
Cummings Hobbs & Wallace	1 to 4	\$500 to 999	54111002	54
GMA Inc	1 to 4	\$500 to 999	54182002	54
Kenneth Barber & Assoc	1 to 4	\$1 to 499	54161401	54
Peter R Brown Construction Inc	1 to 4	\$500 to 999	54111002	54
Rosalyn Bonds Greene	1 to 4	\$1 to 499	54111002	54
Tallahassee Logo & Advertising	1 to 4	\$1,000 to 2,499	54189008	54
Taxes By The Book	1 to 4	\$1 to 499	54121301	54
Waterhouse & Assoc	5 to 9	\$1 to 499	54121301	54
Advanced Plumbing Inc	10 to 19	\$1,000 to 2,499	56299102	56
Economy Lawn & Tree Svc	1 to 4	\$1 to 499	56173022	56
Labor Finders	1 to 4	\$1 to 499	56132001	56
Mary Elizabeth Morgan Cleaning	1 to 4	\$1 to 499	56172001	56
Target Copy	20 to 49	\$2,500 to 4,999	56143903	56
Tekey's Pest Control	1 to 4	\$1 to 499	56171009	56
Griffin Middle School	50 to 99		61111007	61
Sail High School	20 to 49		61111007	61
Steel-Collins Middle School	5 to 9		61111007	61
Adoption With A Heart	5 to 9		62411001	62
Bethel Family Counseling	5 to 9	\$500 to 999	62111107	62
Brandon's Place At Lincoln	10 to 19	\$1 to 499	62441003	62
Capital Area Community Action	5 to 9		62419012	62
Casa Calderon Apartments	5 to 9	\$1 to 499	62331101	62
Catholic Charities	5 to 9	\$1 to 499	62419011	62
Eye I Deals	5 to 9	\$500 to 999	62132003	62
Haven Of Rest Mission	5 to 9		62422104	62
Lutheran Social Svc	1 to 4		62419012	62
Neighborhood Health Svc Inc	1 to 4	\$500 to 999	62111107	62
Shelter	10 to 19		62419012	62
Shisa	1 to 4	\$500 to 999	62199901	62
Toya Child Care Ctr	1 to 4	\$1 to 499	62441003	62
Toya Learning Ctr	1 to 4	\$1 to 499	62441003	62
Virginia Street Head Start Ctr	5 to 9	\$1 to 499	62441003	62
Watch Me Grow Child Care	1 to 4	\$1 to 499	62441003	62
Dade Street Community Ctr	5 to 9	\$500 to 999	71394010	71
Fourth Avenue Community Ctr	5 to 9	\$1 to 499	71394010	71
Mike Martin Baseball Camp	1 to 4	\$1 to 499	71399002	71
Robinson Trueblood Pool	5 to 9	\$500 to 999	71394020	71
Bethel Family Restaurant	5 to 9	\$1 to 499	72221105	72
Big Daddy's	5 to 9	\$1 to 499	72241006	72
Blue Collar Banquet Facility	1 to 4	\$1 to 499	72232001	72
Blue Collar Snack Shop	1 to 4	\$1 to 499	72221105	72
Bullwinkle's Saloon	20 to 49	\$1,000 to 2,499	72241001	72
Chubby's Chicken Fingers	10 to 19	\$1 to 499	72221105	72
Ferrell's Plaza	10 to 19	\$1 to 499	72221105	72
Floyd's Music Store	20 to 49	\$2,500 to 4,999	72241006	72
G & G Restaurant	1 to 4	\$1 to 499	72221105	72
Greater French Town Governors	10 to 19	\$1 to 499	72221105	72
Gumby's Pizza	20 to 49	\$1,000 to 2,499	72211016	72
Hallie's Ice Cream Fountain	1 to 4	\$1 to 499	72221313	72
Holiday Inn-Downtown Cptl Hill	50 to 99	\$5,000 to 9,999	72111002	72
Irish Pub & Coffee House	1 to 4	\$1 to 499	72241001	72
Jenny's Lunchbox li	10 to 19	\$1 to 499	72221105	72
Ken's Tavern	5 to 9	\$500 to 999	72241001	72
Loop Pizza Grill	20 to 49	\$1,000 to 2,499	72221105	72
Mc Donald's	20 to 49	\$1,000 to 2,499	72221105	72
Pitaria	10 to 19	\$1 to 499	72221105	72
Poor Paul's Pourhouse	5 to 9	\$500 to 999	72241001	72
Popeye's Chicken & Biscuits	10 to 19	\$500 to 999	72221105	72
San Salvadore Lounge	1 to 4	\$1 to 499	72241003	72
Subway Sandwiches & Salads	20 to 49	\$500 to 999	72221105	72

Company Name	Number of Employees	Sales Volume (\$000)	NAICS Code	Sector
Tini's Lower Lounge	1 to 4	\$1 to 499	72241001	72
Tropical Smoothie Cafe	5 to 9	\$1 to 499	72221105	72
University Inn & Suites	5 to 9	\$500 to 999	72111002	72
Wendy's	20 to 49	\$1,000 to 2,499	72221105	72
Wilson's Bar-B-Que & Soul Food	5 to 9	\$1 to 499	72221105	72
Yianni's Chapter Ii	1 to 4	\$1 to 499	72241001	72
Zaxby's	20 to 49	\$1,000 to 2,499	72221105	72
A Life Recovery Ctr Inc	1 to 4	\$500 to 999	81331905	81
A Touch Of Health	1 to 4	\$1 to 499	81219908	81
Al's New Image Unisex Hair Sln	1 to 4	\$1 to 499	81211202	81
Artistic Barber Shop	5 to 9	\$1 to 499	81211101	81
Artistic Beauty Shop	1 to 4	\$1 to 499	81211202	81
Bethel Baptist Church	1 to 4		81311008	81
Bethel Christian Academy	10 to 19		81311006	81
Bethel Empowerment Foundation	1 to 4		81341018	81
Bethel Family Life Ctr	5 to 9		81311008	81
Campus Edge Coin Laundry	1 to 4	\$1 to 499	81232001	81
Capital City Tattoo'z	1 to 4	\$1 to 499	81299030	81
Church Of God Of Prophecy	1 to 4		81311008	81
Co-Cathedral Of St Thomas More	10 to 19		81311008	81
Doc's One Stop Hair Nail Place	1 to 4	\$1 to 499	81211202	81
Fine Art For Life	1 to 4	\$1 to 499	81299030	81
First Mission Annex	1 to 4		81311008	81
First Mission Christ Temple	1 to 4		81311008	81
Florida Coalition For Homeless	1 to 4		81341018	81
Frenchtown Boys & Girls Club	1 to 4		81341018	81
Frenchtown Outreach Ctr Inc	5 to 9	\$1,000 to 2,499	81331904	81
Furrin Auto	5 to 9	\$500 to 999	81111104	81
Gilliams Barber Shop	5 to 9	\$1 to 499	81211101	81
Grace Mission	5 to 9		81311008	81
Greater Blessings Tabernacle	1 to 4		81311008	81
Greater Mt Pleasant Missionary	10 to 19		81311008	81
Image Makers Co	1 to 4	\$1 to 499	81211101	81
Macedonia Primitive Baptist	1 to 4		81311008	81
Mt Olive Lodge 5	1 to 4		81341002	81
New Designs Hair Works	1 to 4	\$1 to 499	81211202	81
Philadelphia Primitive Baptist	1 to 4		81311008	81
Pioneer Brake & Auto Repair	1 to 4	\$1 to 499	81111104	81
Private Quarters Hair Salon	5 to 9	\$1 to 499	81211202	81
Project Anne Inc	1 to 4		81331908	81
Randolph Cleaners	1 to 4	\$1 to 499	81232002	81
Shear Designs	1 to 4	\$1 to 499	81211101	81
Sheffield's Body Shop	1 to 4	\$1 to 499	81112102	81
Shisa House West	5 to 9		81331908	81
St Marys Primitive Church	1 to 4		81311008	81
Strong-Jones Funeral Home Inc	5 to 9	\$500 to 999	81221002	81
Tallahassee Church Of God	1 to 4		81311008	81
Tallahassee Urban League Inc	10 to 19		81331908	81
Today's Hair Design	1 to 4	\$1 to 499	81211101	81
Trinity Missionary Baptist	1 to 4		81311008	81
Veldt Barber & Beauty Salon	1 to 4	\$1 to 499	81211202	81
Watson Temple Cogic Fellowship	1 to 4		81311008	81
Leon County Growth & Env Mgmt	50 to 99		92112007	92
Neighborhood & Community Svc	1 to 4		92112006	92
Neighborhood Health Svc Inc	20 to 49		92312001	92
Tallahassee Housing Dev Svc	20 to 49		92112006	92
Tallahassee Human Svc Dev	1 to 4		92313001	92
Tallahassee Parking Tickets	5 to 9		92112006	92

5.D.5 Tallahassee Regional Airport

5.D.5.1 Demographics

5.D.5.1.1 Population

The year 2006 population was 22,700. The 2000 Census showed a population of 22,318, and in the year 1990, it was 22,663 representing a 1.5% decrease. It was estimated that the population will be 22,932 in the year 2011, representing an increase of 1.0% from the year 2006. The population was 49.3% male and 50.7% female. In the year 2006, the median age of the population was 29.2, compared to the US median age that was 36.5. The population density was 802.9 people per square mile.

5.D.5.1.2 Households

There were 8,777 households in the year 2006. The Census showed household counts of 9,162 in the year 2000, up from 9,037 in the year 1990, representing an increase of 1.4%. It was estimated that the number of households will be 9,196 in the year 2011, representing an increase of 4.8% from the year 2006. The average household size was 2.59 persons.

In the year 2006, the median number of years in residence was 2.12. The average household size was 2.54 people and the average family size was 3.40 people. The average number of vehicles per household was 1.5.

5.D.5.1.3 Income

In the year 2006, the median household income was \$24,812, compared to the US median that was \$48,271. The Census showed median household incomes of \$22,203 in the year 2000 and \$16,636 in the year 1990 representing an increase of 33.5%. It was estimated that the median household income will be \$26,425 in the year 2011, which would represent an increase of 6.5% from the year 2006.

In the year 2006, the per capita income was \$12,892, compared to the \$US per capita, which was \$24,529. The 2006 average household income was \$33,355, compared to the US average of \$63,629.

5.D.5.1.4 Race & Ethnicity

In the year 2006, the racial makeup was as follows: 34.2% White; 60.3% African American; 0.3% Native American; 3.1% Asian/Pacific Islander, and 1.0%

other. This can be compared to the US racial makeup of 75.9% White, 12.1% African American, 0.7% Native American, 4.5% Asian/Pacific Islander and 4.5% Other.

People of Hispanic ethnicity are counted independently of race. People of Hispanic origin made up 3.6% of the year 2006 population when compared to the US makeup of 14.9%. Changes in the population within each race and ethnicity category from the 1990 Census to the 2000 Census were as follows: 10.8% American Indian, Eskimo, Aleut Population; -14.0% Asian, Pacific Islander; 14.8% African American; 85.3% Hispanic Ethnicity; 77.6% Other; and White -25.2%.

5.D.5.1.5 Housing

The median housing value was \$44,251 in the year 1990; compared to the US median of \$78,382 for the same year. The 2000 Census median housing value was \$61,882, which was a 39.8% increase from 1990. In the year 1990, there were 4,062 owner occupied housing units vs. 3,967 in the year 2000. Also in the year 1990, there were 4,975 renter occupied housing units vs. 5,195 in the year 2000. The average rent in the year 1990 was \$267 vs. \$412 in the year 2000.

5.D.5.1.6 Employment

In the year 2006, there were 11,574 people over the age of 16 in the labor force. Of these 96.8% were employed, 3.2% were unemployed, 35.2% were not in the labor force and 0.0% were in the Armed Forces. In the year 1990, unemployment was 8.2% and in the year 2000, it was 7.6%.

In the year 2006, there were 8,612 employees (daytime population) and there were 653 business establishments. For this area in the year 1990, 59.8% of employees were employed in white-collar occupations and 40.2% were employed in blue-collar occupations. In the year 2000, white-collar workers made up 57.8% of the population, and those employed in blue-collar occupations made up 42.2%. In the year 1990, the average time traveled to work was 11 minutes and in the year 2000 it was 19 minutes.

5.D.5.2 Business Listing by NAICS

There are 30 businesses in this strategic location. Most of these businesses are transportation and retail trade sectors.

Table 75: Business Listing in Tallahassee Regional Airport Strategic Location (2007)

Company Name	Number of Employees	Sales Volume (\$000)	NAICS Code	Sector
FORESTRY DIVISION	10 to 19	\$2,500 to 4,999	11531005	11
PARADIES SHOPS	5 to 9	\$500 to 999	45322013	45
ABX AIR INC	5 to 9	\$1,000 to 2,499	48111201	48
AERO ASSOCIATES INC	5 to 9	\$1,000 to 2,499	48819004	48
AMERICA WEST AIRLINES	10 to 19	\$2,500 to 4,999	48111102	48
DELTA CARGO	1 to 4	\$500 to 999	48111102	48
FLIGHTLINE GROUP INC	50 to 99	\$10,000 to 19,999	48819004	48
MESABA AIRLINES	10 to 19	\$2,500 to 4,999	48111102	48
TALLAHASSEE REGL AIRPORT-TLH	500 to 999	\$50,000 to 99,999	48811907	48
ALAMO RENT-A-CAR	20 to 49	\$2,500 to 4,999	53211101	53
ALAMO RENT-A-CAR	10 to 19	\$2,500 to 4,999	53211101	53
AVIS RENT A CAR	20 to 49	\$10,000 to 19,999	53211101	53
BUDGET RENT A CAR	5 to 9	\$1,000 to 2,499	53211101	53
DOLLAR RENT A CAR	5 to 9	\$1,000 to 2,499	53211101	53
EAGLE AIRCRAFT CORP	10 to 19	\$1,000 to 2,499	53241101	53
ENTERPRISE RENT A CAR	10 to 19	\$1,000 to 2,499	53211101	53
HERTZ RENT A CAR	20 to 49	\$5,000 to 9,999	53211101	53
HERTZ RENT A CAR	50 to 99	\$10,000 to 19,999	53211101	53
NATIONAL CAR RENTAL	20 to 49	\$5,000 to 9,999	53211101	53
HENRY & RILLA WHITE FOUNDATION	1 to 4		54172006	54
MEGADATA CORP	1 to 4	\$500 to 999	54169074	54
LIFENET AIR AMBULANCE	10 to 19	\$1,000 to 2,499	62191002	62
COFFEE BEANERY LTD	1 to 4	\$1 to 499	72221305	72
CREATIVE HOST SVC OF FLORIDA	20 to 49	\$500 to 999	72221105	72
CHURCH OF CHRIST SPRINGHILL RD	1 to 4		81311008	81
STANDARD PARKING	10 to 19	\$1,000 to 2,499	81293004	81
STRESS BUSTERS ZONE INC	1 to 4	\$1 to 499	81219908	81
UNITY BAPTIST CHURCH	1 to 4		81311008	81
YOUTHTRACK INC SEMINOLE WORK	20 to 49		81341018	81
LEON COUNTY SCH AVIATION MNTNC	1 to 4		92119002	92

6. Economic Impact Analysis

Economic impact analysis of new, existing, expanding or relocating businesses is frequently analyzed using economic impact modeling software.

6.A Economic Impact Using Input Output Analysis

Input Output analysis is an accounting framework that describes an economy's flow of goods and services. There are usually multipliers that are generated or calculated (output, employment and income). They measure total change throughout the economy (including indirect and induced effects). They also can be used to predict changes in local output, employment and income resulting from a change in economic activity.

6.B Economic Impact Analysis Considerations for Measurement³⁴

Typically, these include:

- How many workers will be hired, and what is the expected payroll and expected value of production?
- What is the multiplier effect?
- What is the timeline for employment (how long will it take to reach capacity)?
- What is the new economic activity associated with new or expansion of business?
- Will the new economic activity stimulate construction in related businesses, housing, and other sectors of the economy?
- Do the changes in employment, income and sales represent net or gross additions to the community's economic base?
- How does the new economic activity compliment the local economic situation?
- Which people and businesses will benefit; which will bear the costs?

6.C Some Economic Impact Analysis Questions/Criteria That Are Required For Economic Impact Modeling To Occur

- What is the economic analysis that needs to be performed? Is it for one year or for multiple years?
- What is the area of analysis? City, County, Region?

³⁴ John Gordon in How Extension Can Help Communities Conduct Economic Impact Analysis.

- What data are available? Typically, information/variables such as business/sector NAICS codes for industry and positions, number of employees, projected salaries/wages, construction expenditures, etc., are data used for the IMPLAN/REMI models.
- How much time do you have to respond?
- Resources – What funding is available?
- How should the results be delivered or presented?

FSU CEFA has been performing economic impact analysis in recent years for businesses that are start-ups, relocating or expanding in the Tallahassee area. Usually, CEFA provides the economic impact results in terms of revenues/sales (output), income and employment. There are additional results often presented regarding businesses including projected tax revenues and value-added, among others. Some examples of recent economic impact analyses conducted by FSU CEFA for the EDC included:

- Danfoss Turbocor
- Medical Manufacturing
- Project Trophy
- Project Osprey
- Talla-Tech Industry Expansion
- Motorcycle Assembly Plant

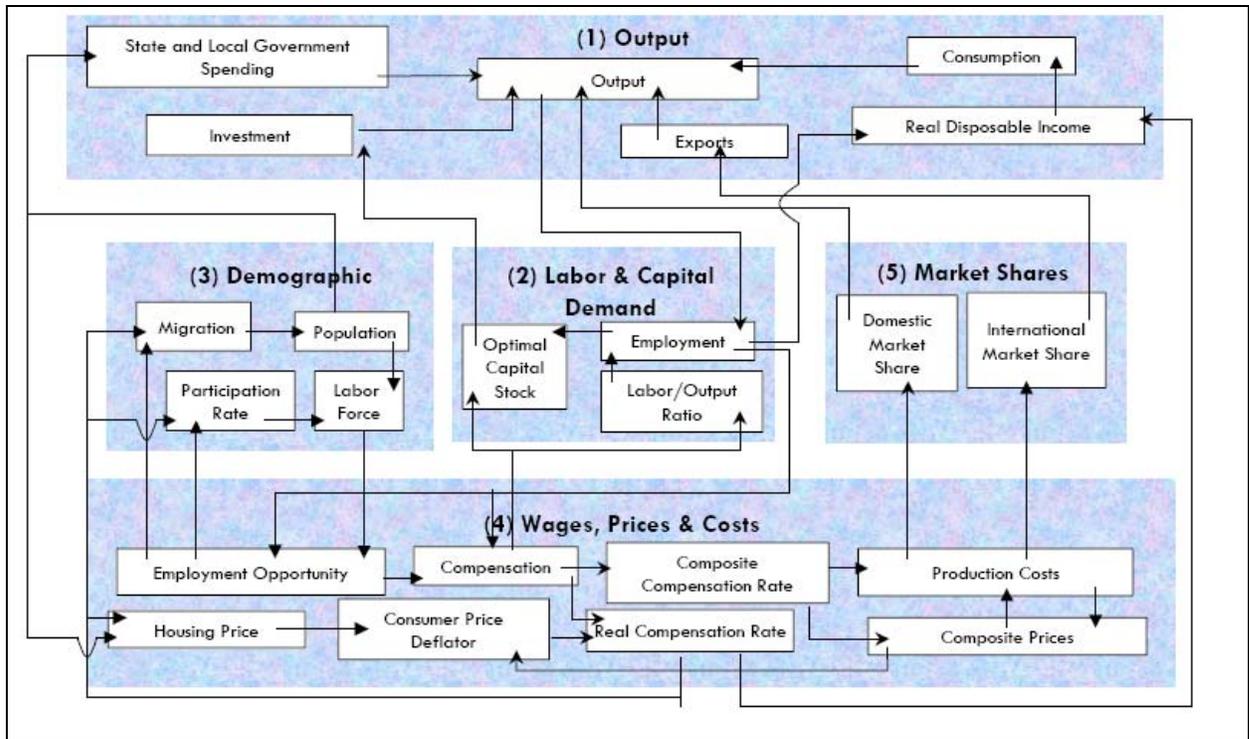
6.D The REMI Model

REMI, 2004 is a widely used dynamic integrated input-output and econometric model. REMI is based on neoclassical theory and was founded in the year 1980. REMI is used extensively to measure proposed legislative and other program and policy economic impacts across the private and public sectors of the state by the Florida Joint Legislative Management Committee, Division of Economic & Demographic Research, the Florida Department of Labor and other state and local government agencies. In addition, it is the chosen tool to measure these impacts by a number of universities and private research groups that evaluate economic impacts across the state and nation. The following figure provides a baseline for the calculation of economic impact estimates in REMI.

The REMI model shares two underlying assumptions with mainstream economic theory: households maximize their utility and producers maximize their

profits. The REMI model includes hundreds of equations that describe cause-and-effects relationships in the economy, extending beyond an input-output model.

Figure 42: REMI Economic Impact Analysis Framework

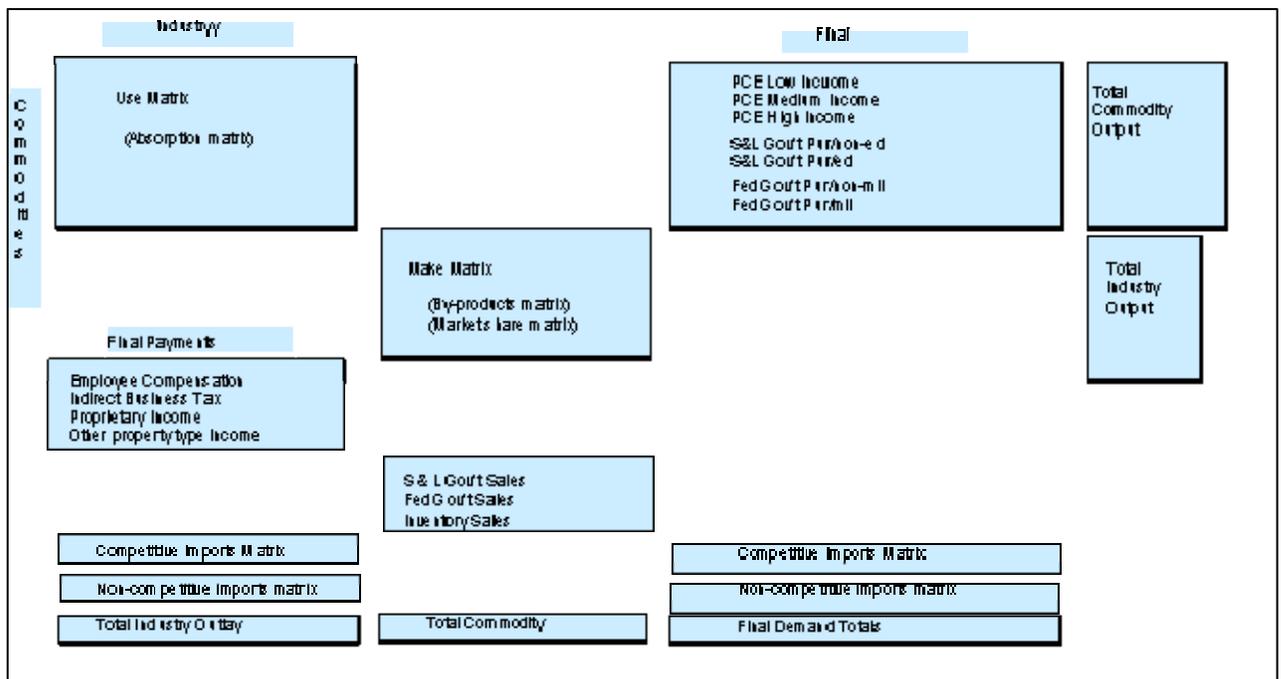


A REMI model (version 8.0) has been developed for this region (by county), and is currently housed with the Apalachee Regional Planning Council (ARPC) and includes 23 sectors. FSU CEFA uses the REMI model that has been developed for the state of Florida and includes 169 sectors. REMI's principal advantage is that it is a dynamic input output econometric model, and can be used to forecast both direct and indirect economic effects over multiple-year periods. However, the model is not county specific which could lead to unnecessarily inflated results. Other input-output models primarily are used for static or single year analysis. REMI uses three sources of employment wage and salary data: the Bureau of Economic Analysis (BEA) employment, wage, and personal income series, ES-202 establishment employment and wage and salary data, and County Business Patterns (CBP) data published by the Bureau of the Census. The industries are based on the North American Industrial Classification System (NAICS).

6.E The IMPLAN Model

The Impact Analysis for Planning, or IMPLAN model, in contrast to REMI, is solely an input-output model. The theoretical framework is input output, developed by Wassily Leontief, for which he received the Nobel Prize in the year 1973. The basic assumption of the IMPLAN model is that the fundamental information in input output analysis involves the flow of products from each industrial sector (producer) to each of the industrial sectors considered as consumers. IMPLAN was founded in the year 1993, as an extension of two researchers' work at the University of Minnesota and involving collaborative work with the U.S. Forest Service Land Use Planning Unit in Colorado. It is non-survey based, and its structure illustrates that of input-output models found in the regional science literature. The following figure provides a baseline for the calculation of the economic impact estimates in IMPLAN.

Figure 43: IMPLAN Economic Analysis Framework



* IMPLAN Central NRCS Economists Workshop, MIG, INC. 1997

Key Input-Output Assumptions Used in IMPLAN

1. Constant returns to scale production function (i.e., linear)
2. Homogeneous sector output

3. No input substitution
4. No supply constraints
5. Other IMPLAN Considerations
 - a. Technology and trade relations are assumed.
 - b. Need to account for Price changes.
 - c. Need to account for Structural changes
 - d. Employment increase or decrease causes immediate in or out migration (i.e., full employment)

Similar to REMI, IMPLAN assumes a uniform national production technology and uses the regional purchase coefficient approach to regionalize the technical coefficients. IMPLAN 2004 Florida county-level was used for the economic analysis for this research. This newer version now has 509 sectors instead of 528 and includes the conversion from SIC to NAICS codes. The primary sources of employment and earnings data are County Business Patterns data and BEA data.

6.F Targeted Economic Development (TED)

TED is a systemized approach to analyzing a community or regional economy to identify potential options for creation, attraction, retention, or expansion of job/income opportunities and economic growth. It is also analytical tools and community-planning tools are utilized to enhance community decision making and incorporate local desires and ideas. It includes several methodologies:

- Target Industry Analysis
- Cluster Analysis
- Community Assessment and Planning

Target Industry Analysis is a method of local community economic analysis that produces a list of business sectors that have a moderate-to-strong likelihood of containing companies that might be interested in expanding and/or locating in the community under study. Target Industry Analysis Techniques include:

- Econometrics (probability)
- Location Quotients
- Input-Output Analysis

6.G Econometric Model of TED

The following model captures the contention that cities attempt to determine the payoff of program designation before applying. The expected payoff from applying for a targeted development program can be specified as follows:

$$V_{it} = P_{it} (B_{it} - C_{it}) - A_{it}$$

Where P_{it} is the probability of city i receiving program t designation, B_{it} is the discounted present value of the expected benefit of implementing the program, C_{it} is the discounted present value of the cost of implementing the program, and A_{it} is the cost of completing the application. A city applies for a program if its expected payoff is positive.

Cities are allowed to apply for more than one designation for a given qualifying area. In this case, city i first applies for the program that has the highest expected payoff, assuming it is the only program implemented. If $V_{i,1} > V_{i,2}$, city i will choose to apply for Program 1 designation.

The city evaluates the merit of applying for the second program. It is likely that the marginal benefit of receiving either program designation would be smaller if it is selected second instead of first.

The cost of completing the second application is likely to be less, given that both programs require a similar strategic planning process. Even if the probability of receiving both programs is low, a city may still benefit from applying to a second program if the cost of the second application is sufficiently small or if submitting both applications increases the probability of receiving either designation enough to compensate for the extra application costs.

Although little is known about the perceived benefits or the expected probability of receiving designation, one can still make inferences about the choice between the two programs. In particular, unless the benefit of implementing a Program 2 is sufficiently high to offset the higher implementation costs, and as long as the probabilities of receiving designation are the same, we would expect the city to select Program 2 over Program 1 in the application procedure.

There are also potential differences in the application decision parameters across cities. Application costs, for instance, may vary across cities depending on unique features of government. In addition, the expected benefits of the programs may be greater for cities in relatively worse economic conditions.

7. Conclusions and Recommendations

7.A Conclusions

1. The City of Tallahassee/ Leon County has several merits that together form a solid package of incentives for businesses to locate, expand or relocate in Tallahassee. The quality of life measures showed that the City of Tallahassee has a good standing in this regard.
2. The strategic locations determined by the EDC of Tallahassee/ Leon County support several industries that are beneficial to local economic growth and development in Tallahassee and to the level of employment.
3. The new economy trend ranks Tallahassee MSA high relative to the other MSA's in the state.
4. The GIS analysis is a useful visual tool to investors interested in businesses startup, expansion or relocation.
5. The enterprise zone area contains 4,577 businesses defined by NAICS, City of Tallahassee EZ map, and the WITS database.

7.B Recommendations

1. Given that QOL factors in Tallahassee are well documented and support a high standard of living, it is recommended that QOL factors be included in investment incentive packages offered to new or expanding business.
2. The GIS analysis should be used as a tool available to interested investors to provide a visual description about the benefits of investing in the City of Tallahassee. For example, businesses five minutes from Tallahassee regional airport are also 3 miles. The enterprise boundaries touch the major highways and the I-10. These facts, and many other facts in this template, are possible suggestions to be included in promoting the city for investors.

186 Businesses within 5 minutes drive time from the Airport.

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