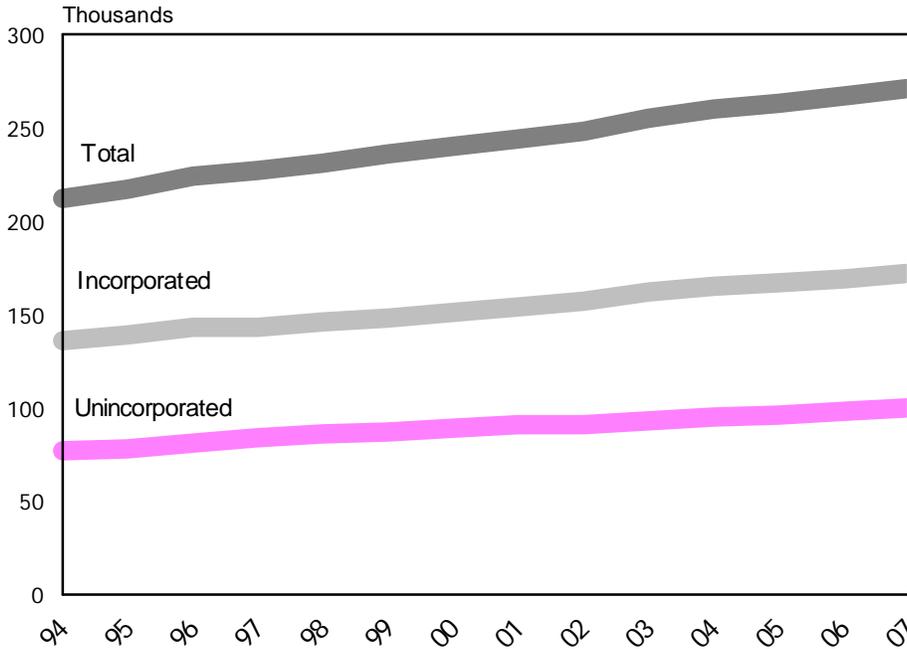


Trend Analysis

Community Economic Profile	6 - 2
Comparative Data for Like-Sized Counties	6 - 11
Comparative Data for Surrounding Counties	6 - 14

Community Economic Profile

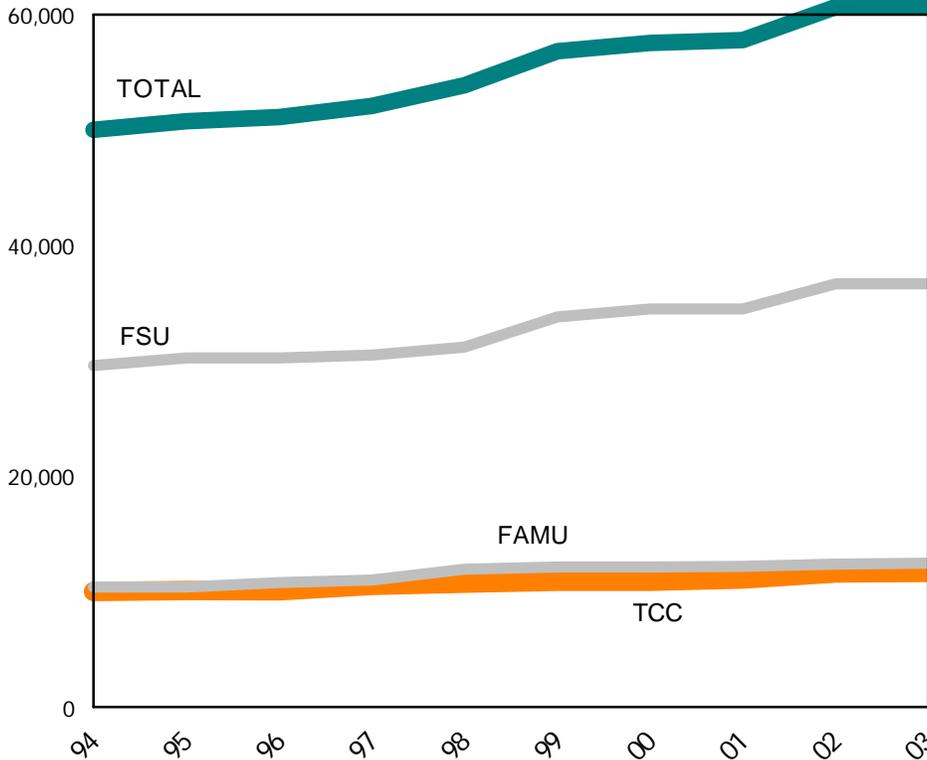
Population



Source: Tallahassee/Leon County Planning Department, Division of Research & Graphics, and University of Florida BEBR.

The population of the County in 2003 was 255,500: 64% Incorporated and 36% Unincorporated. Average ratios over the last decade have remained steady at this 2/3 & 1/3 ratio. Total county population projections are moderate and are stable at 1.4%. The county and the incorporated area have grown steadily with neither area having greater growth than the other, over the last decade. Population estimates include higher education enrollment.

Higher Education Enrollment



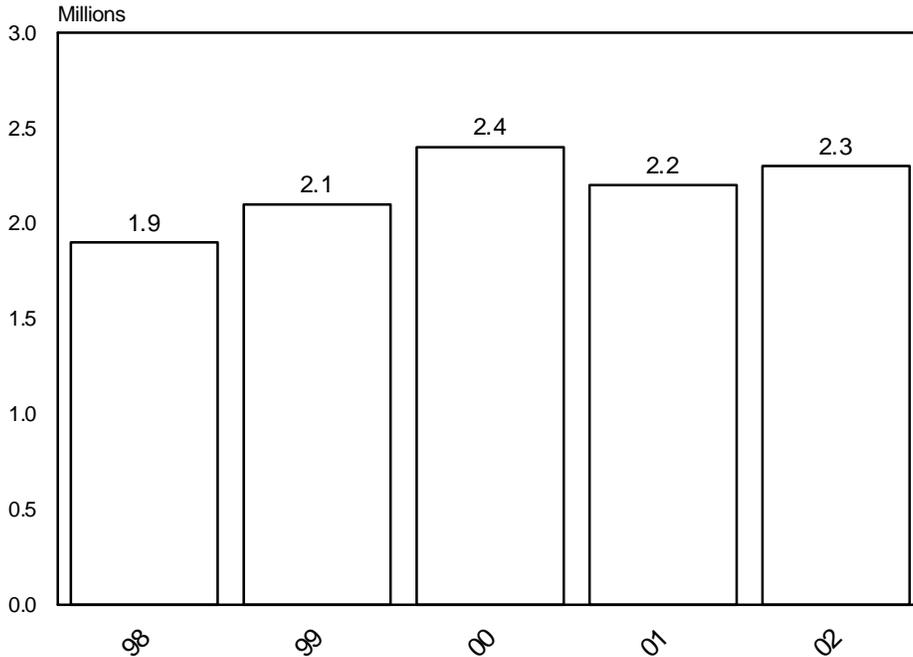
Source: Tallahassee/Leon County Planning Department, Office of the Registrar for FSU, FAMU and TCC.

Three institutions of higher learning are located in Tallahassee: Florida State University (FSU), Florida Agricultural & Mechanical University (FAMU), and Tallahassee Community College (TCC). Total enrollment for 2001 was 57,803 and has remained relatively constant the past 3 years.

In the last decade, FSU has had the highest overall average enrollment increase (2.37%), followed by FAMU (2.13%), then TCC (1.62%). However, in the last year, FAMU has had a higher enrollment increase (.69%) of the 3 institutions..

Community Economic Profile

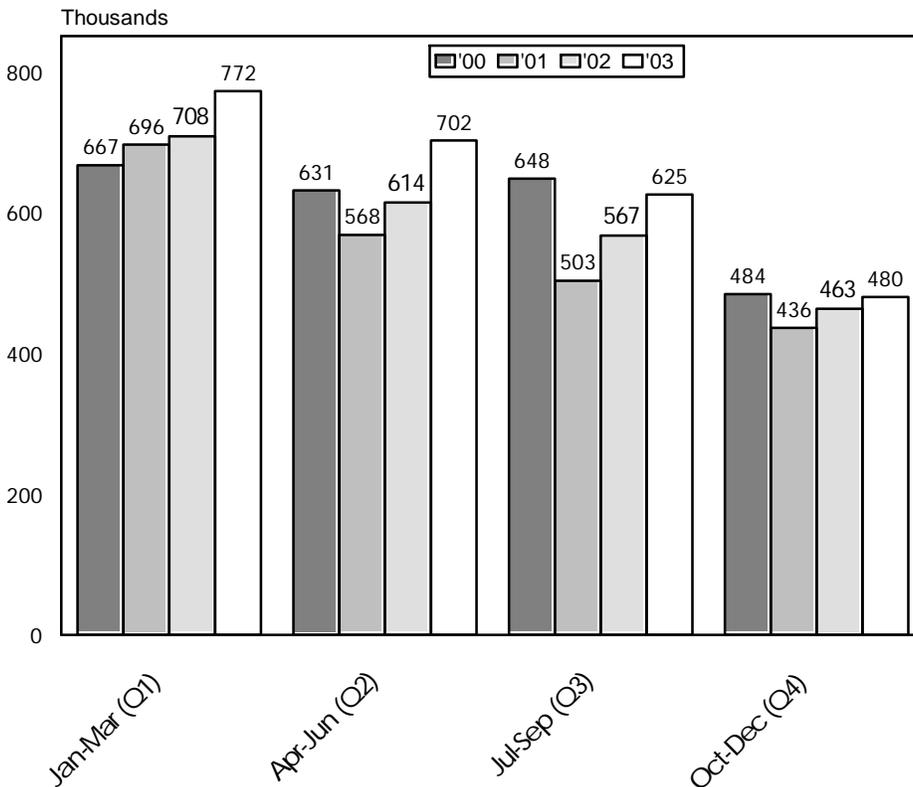
Annual County Visitors



Source: Leon County Tourist Development Council, Dr. Mark A. Bonn, Ph.D., College of Business, Florida State University

Visitor data is collected and reported on an annual basis, therefore, 2001's 8% decrease in visitors reflects two events that significantly impacted usual increases: (1) the events on and after September 11 and (2) a national recession. Visitor data from 2002 reflects a 5% increase in visitors from the previous year.

Quarterly Visitors



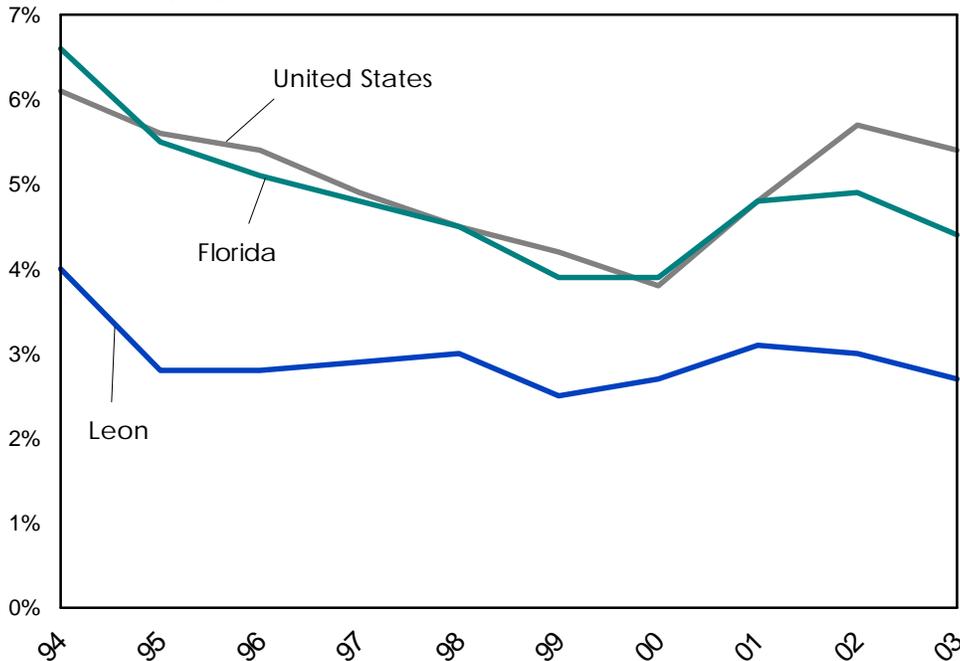
Source: Leon County Tourist Development Council, Dr. Mark A. Bonn, Ph.D., College of Business, Florida State University

Visitor increases are usually seen in the 1st and 2nd quarters (Q1 & Q2) due to the legislative session and higher education events. In 2001, the 2nd, 3rd and 4th quarters experienced a decrease which may be the result of the start of a national recession. However, there have been no decreases per quarter since 2001.

On average 2003 saw a 9.3% increase of quarterly visitors from the previous year. The 4th quarter is typically the quarter with the least visitors.

Community Economic Profile

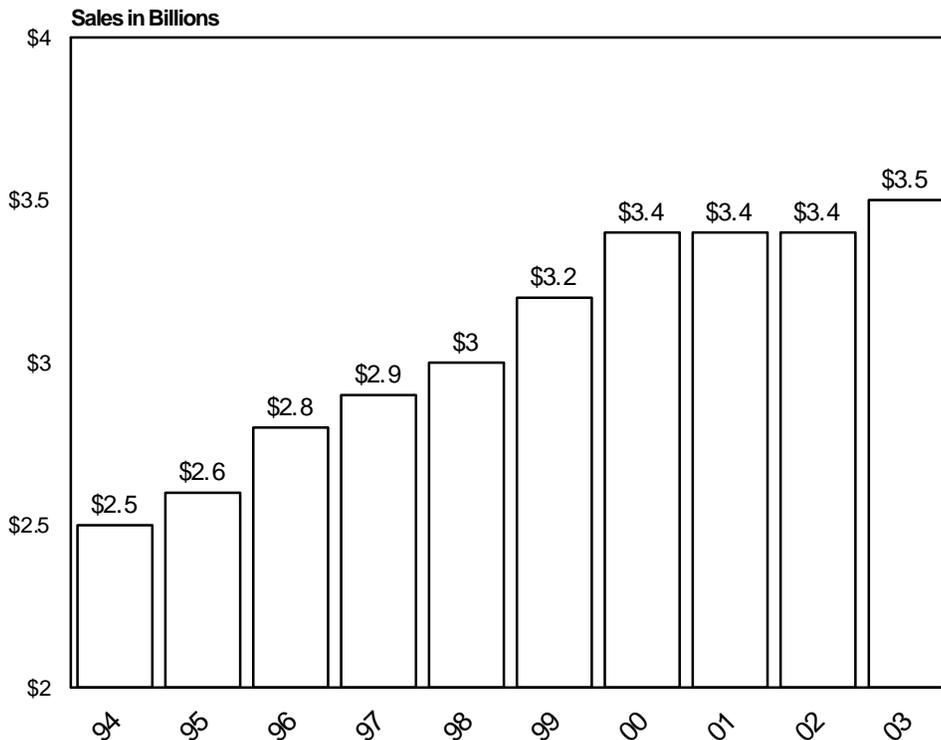
Unemployment Statistics



Unemployment rates are a traditional indicator of economic health. Leon County's unemployment rate has remained below the state and national averages for the last ten years. In addition, it increased 15% in 2001 and decreased 3% in 2002. In 2003, the unemployment rate increased 10% in Leon County, though it still remains at a modest 2.7% as compared to 4.4% statewide and 5.4% nationwide.

Source: Florida Agency for Workforce Innovation, Labor Market Statistics; US Department of Labor, Bureau of Labor Statistics; Tallahassee Leon County Planning Department

Taxable Retail Sales

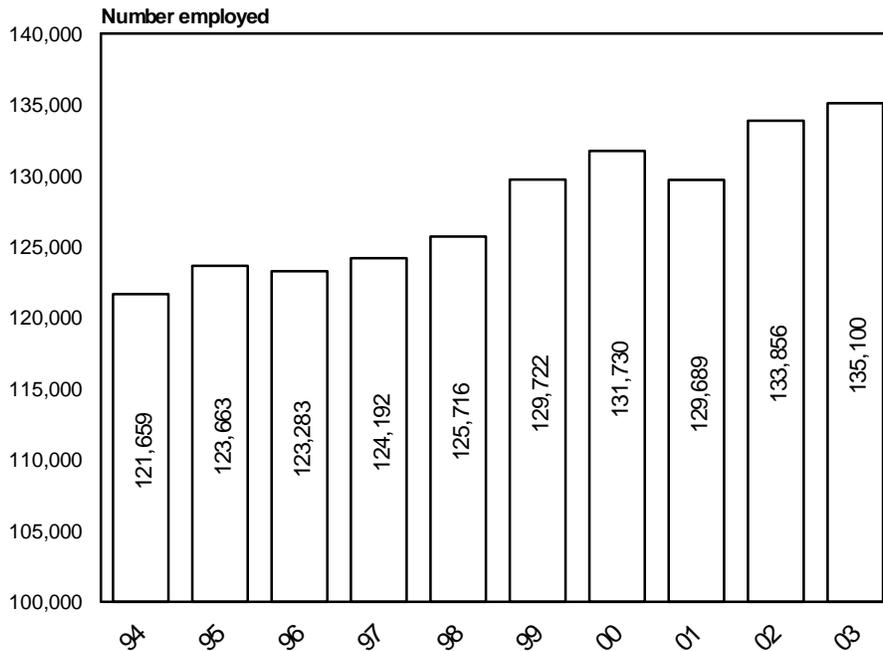


Taxable Retail Sales are reported by Metropolitan Statistical Area (MSA). Tallahassee's MSA includes Leon and Gadsden Counties. Taxable retail sales increased 3.1% in 2003. This compares to a 1.9% increase statewide for the same period.

Source: Florida Legislature's Office of Economic and Demographic Research, Tallahassee Leon County Planning Department

Community Economic Profile

Total County Labor Force



The number of civilian workers in Leon County increased slightly by 1% from 2002 to 2003. Since 1994, the number of workers in the labor force has increased an average of 1% annually, or a total of 13,441 positions.

Source: Source: Florida Agency for Workforce Innovation, Labor Market Statistics; US Department of Labor, Bureau of Labor Statistics; Tallahassee Leon County Planning Department

Employment by Industry - 1993 vs. 2003

Industry	# Employees 1993	% Labor Force	# Employees 2003	% Labor Force	% Change
Government	54,400	40.9%	61,300	38.0%	12.7%
Services & Miscellaneous	40,200	30.2%	55,900	34.6%	39.1%
Retail Trade	15,000	11.3%	17,600	10.9%	17.3%
Finance, Insurance & Real Estate	5,600	4.2%	7,300	4.5%	30.4%
Construction	5,800	4.4%	7,000	4.3%	20.7%
Wholesale Trade	3,100	2.3%	2,900	1.8%	-6.5%
Manufacturing	3,900	2.9%	3,600	2.2%	-7.7%
Transportation, Communication & Public Utilities	5,100	3.8%	5,900	3.7%	15.7%
Total	133,100	100.0%	161,500	100.0%	21.3%

Over the past ten years, Leon County's major industries include Government, Services, and Retail Trade. This is attributed to the support needed for the large government and higher education infrastructure located in the area.

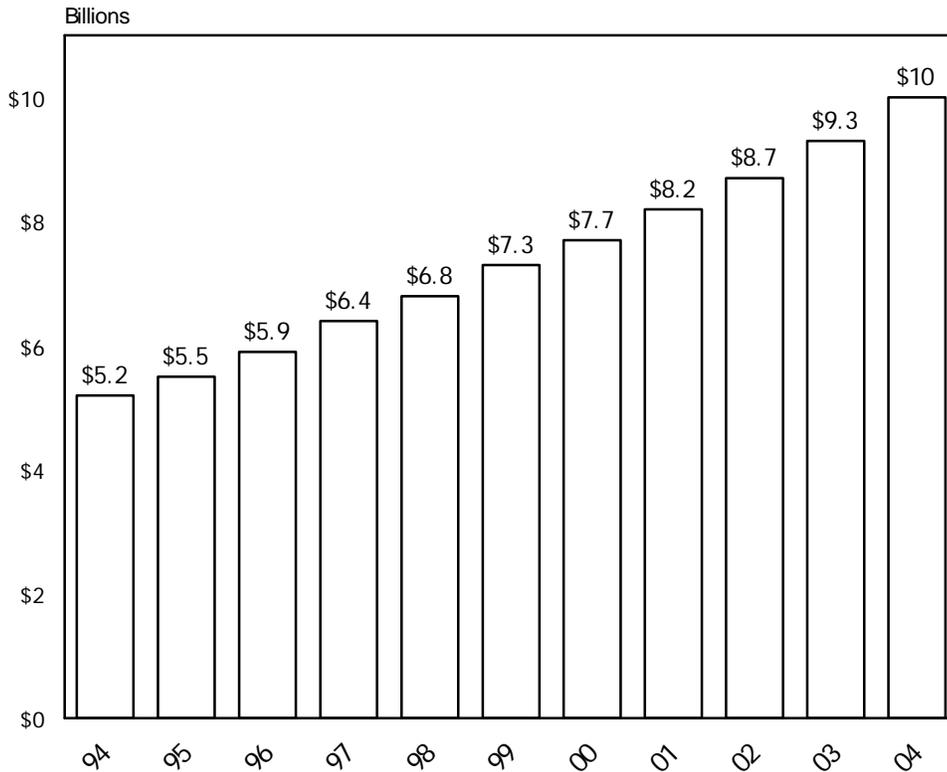
The most dramatic increase over the last decade is the Services sector (39.1%). Areas of Wholesale and Manufacturing are the only areas that have seen a decrease over the past decade.

As a whole, these industries have seen a 21.3% increase in employment over the past decade.

Source: Source: Florida Agency for Workforce Innovation, Labor Market Statistics; US Department of Labor, Bureau of Labor Statistics; Tallahassee Leon County Planning Department

Community Economic Profile

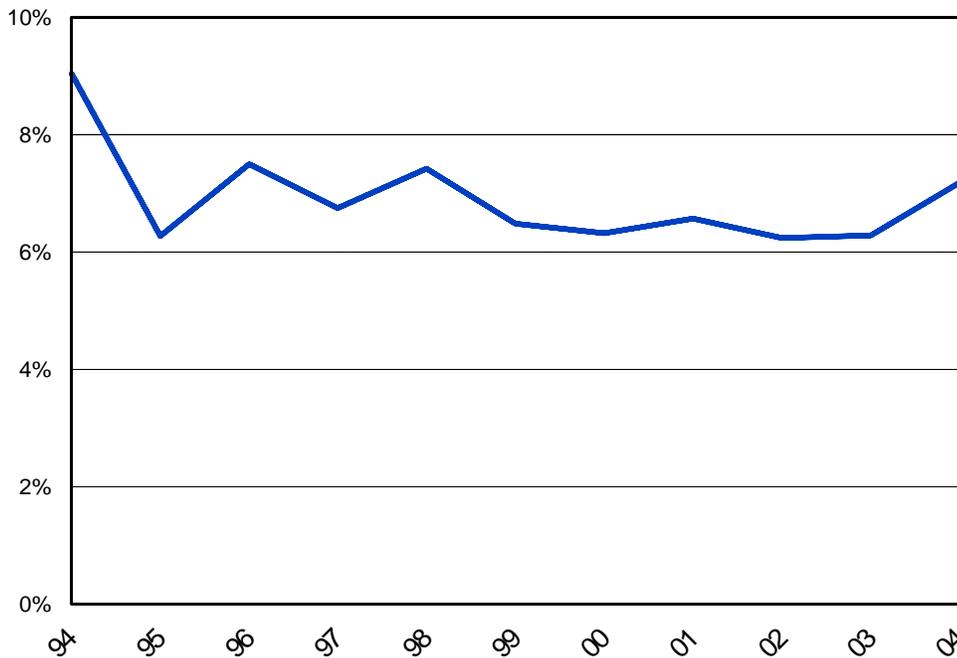
Taxable Value



Taxable values have increased steadily over the past 10-year period.

Source: Certification of Final Taxable Value, Forms DR-420 & DR-422

Annual Percentage Increase of Taxable Value



The average annual amount of growth during this ten-year period is 6.7%.

Source: Certification of Final Taxable Value, Forms DR-420 & DR-422

**Leon County Government
Fiscal Year 2005 Budget**

Community Economic Profile
Principal Taxpayers

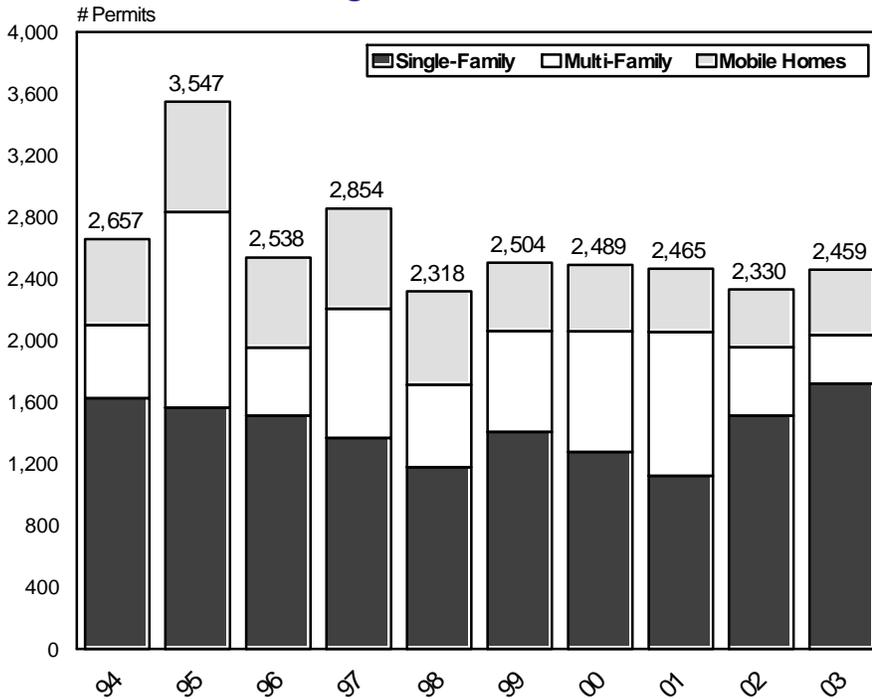
2002			2003		
Name	Total Taxable Value	Total Taxes	Name	Total Taxable Value	Total Taxes
Sprint - Florida, Inc.	\$166,413,756	\$3,546,289	Sprint - Florida, Inc.	\$154,414,956	\$3,366,346
Talquin Electric Coop, Inc.	\$80,762,747	\$1,583,393	Smith Interest General Partnership (Gov. Square Mall)	\$108,557,196	\$2,395,565
Smith Interest General Partnership (Gov. Square Mall)	\$55,129,609	\$1,184,184	Talquin Electric Coop, Inc.	\$86,922,122	\$1,608,603
Koger Equity, Inc.	\$46,631,378	\$1,001,653	Koger Equity, Inc.	\$46,747,189	\$1,035,170
Stiles, J.A., III Etal. Trust (Tallahassee Mall)	\$42,150,288	\$905,388	Stiles, J.A., III Etal. Trust (Tallahassee Mall)	\$44,840,920	\$992,957
Wal-mart Stores	\$31,950,960	\$686,307	Wal-mart Stores	\$28,896,409	\$639,882
Comcast Cablevision, Inc.	\$28,905,988	\$596,316	Blairstone Properties, LLC	\$27,285,201	\$604,203
Blairstone Properties, LLC	\$27,252,400	\$585,382	Capital City Bank	\$26,918,933	\$595,907
Capital City Bank	\$29,368,557	\$545,926	Comcast Cablevision, Inc.	\$27,207,451	\$558,103
Florida Gas Transmission Company	\$26,593,434	\$520,662	Florida Gas Transmission Company	\$27,410,855	\$505,869
Total	\$535,159,117	\$11,155,500	Total	\$579,201,232	\$12,302,605

The taxable value of Leon County's Top Ten Taxpayers increased by \$44 million from 2002 to 2003. This 8% increase in value led to a 10% increase in total taxes paid based on total taxable value.

Note: Taxes Paid reflect all taxing authorities. (i.e. School Board, County, City, etc.)

Community Economic Profile

Residential Building Permits

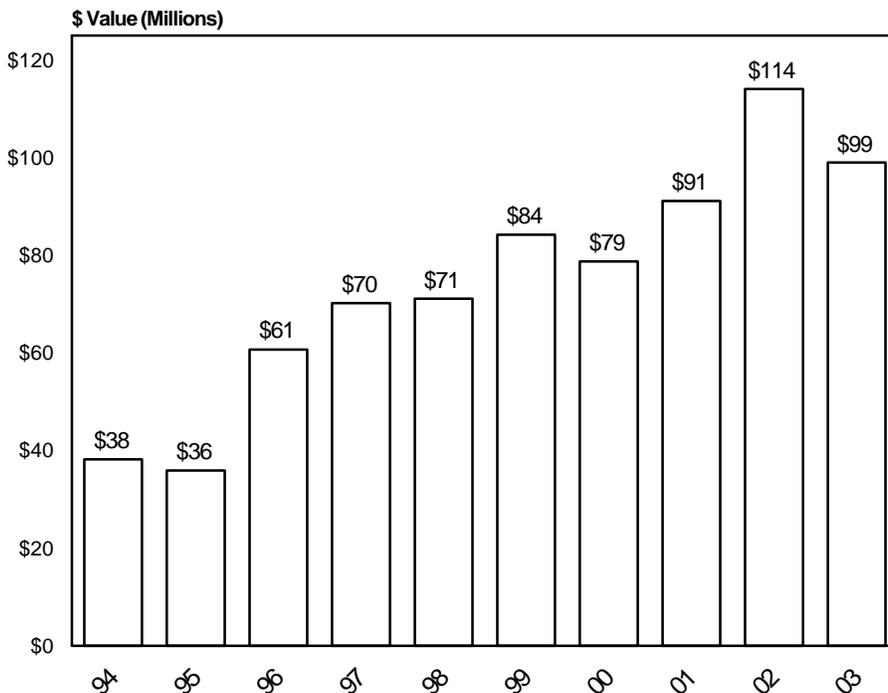


Source: Leon County Growth & Environmental Management and City of Tallahassee Building Inspection Division.

Overall, Residential Building Permits have increased for 2003 by 6%.

Multi-Family permits decreased noticeably (29%) in 2003, but an increase was seen in permits granted for both Single-Family and Mobile Homes.

Commercial Permits



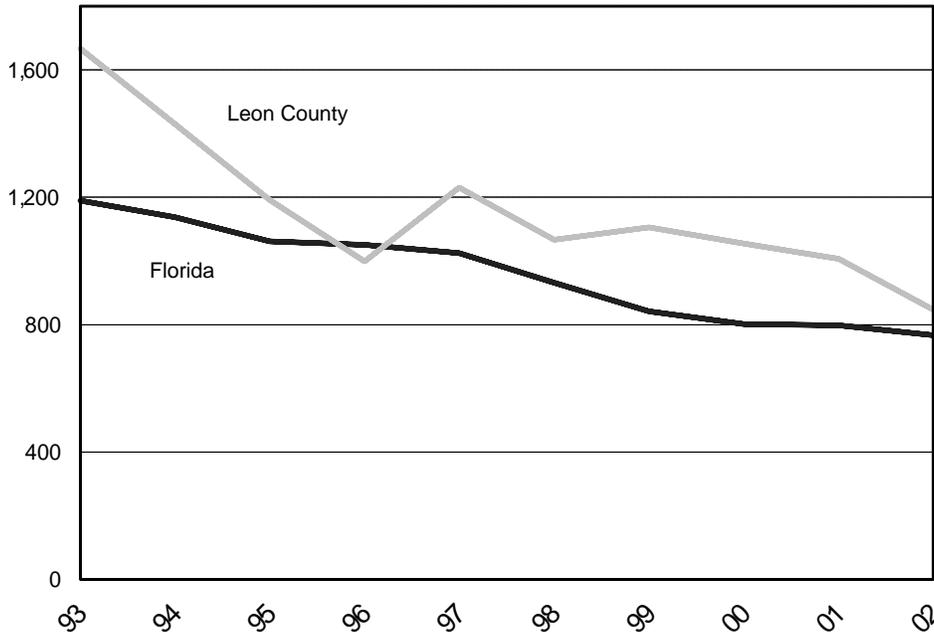
Source: Leon County Growth & Environmental Management and City of Tallahassee Building Inspection Division.

In 1996, commercial development showed a substantial increase. This trend continued through 1999. Since 1996, commercial development in Leon County has remained relatively strong. 2003 reflects a 13% decrease over 2002 activity.

Community Economic Profile

Violent Crime Rate

Per 100,000 Residents



Source: Florida Statistical Analysis Center, FDLE

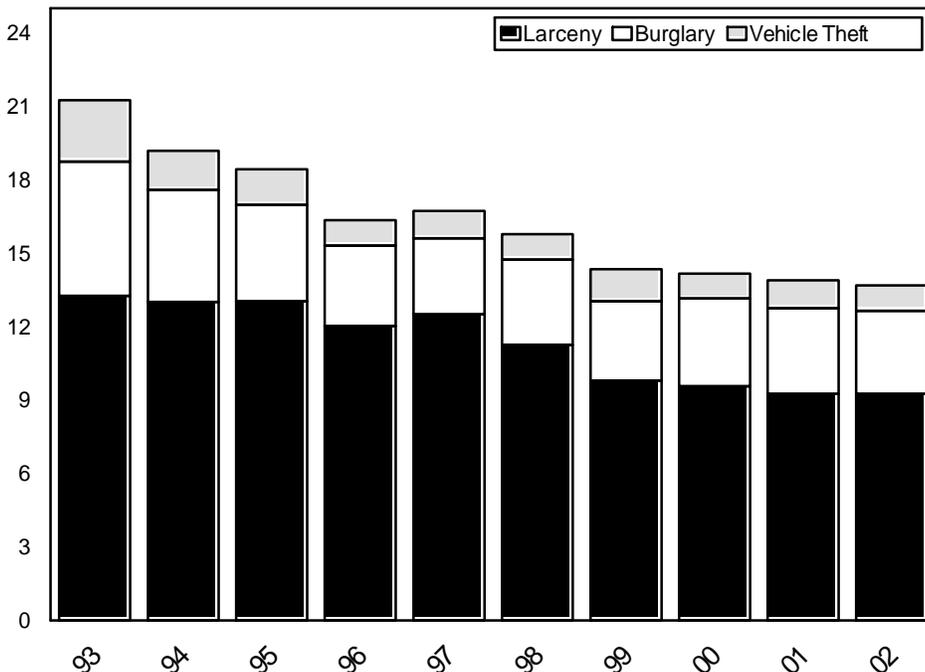
Violent Crime consists of murder, sex offenses, robbery and aggravated assault.

In 2002, Leon County saw a 15% decrease in violent crime committed per 100,000 people.

Over the past ten years Violent Crime has decreased an average of 6.5%.

Crimes Against Property

Thousands



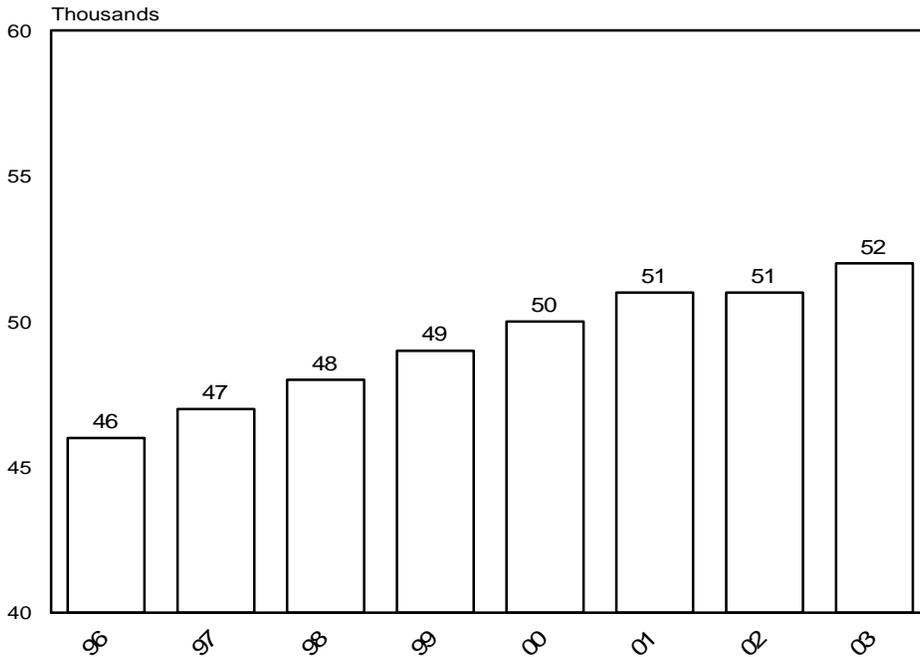
Source: Florida Statistical Analysis Center, FDLE

Property Crime in Leon County has continually decreased since 1993. Over the ten year period there has been an average of 6.6% decrease.

Motor Vehicle Theft saw the greatest decline from 2001 to 2002 at 9%.

Community Economic Profile

Homestead Parcels



Growth in homestead parcels remains steady at approximately 1.5% growth per year.

Source: Property Appraiser, Official Tax Roll Certification (Form DR-403PC)