Capital Area Council of Governments

2008 State of the Region

CAPCOG General Assembly
Marriott Austin Airport South
December 10, 2008

Betty Voights, Executive Director
Brian Kelsey, Director
• 2008
• 2009
• CAPCOG Strategies
• Q&A
2008
• Strong growth, but slowing
• Home building correction
• Rising unemployment
• Still competitive
CAPCOG’s population grew by an estimated 42,000 people in 2007.

CAPCOG ranked third among COGs. 92% of statewide growth was in the 4 largest COGs.

Population Change in Texas COG Regions, 2007

Numeric Change

-1738 - 0
1 - 1000
1001 - 10000
10001 - 50000
50001 - 109310

Source: Texas State Data Center
### Population % of CAPCOG

<table>
<thead>
<tr>
<th>County</th>
<th>Population</th>
<th>% of CAPCOG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travis</td>
<td>956,901</td>
<td>56%</td>
</tr>
<tr>
<td>Williamson</td>
<td>381,461</td>
<td>22%</td>
</tr>
<tr>
<td>Hays</td>
<td>142,310</td>
<td>8%</td>
</tr>
<tr>
<td>Bastrop</td>
<td>72,620</td>
<td>4%</td>
</tr>
<tr>
<td>Burnet</td>
<td>43,433</td>
<td>3%</td>
</tr>
<tr>
<td>Caldwell</td>
<td>35,843</td>
<td>2%</td>
</tr>
<tr>
<td>Fayette</td>
<td>24,037</td>
<td>1%</td>
</tr>
<tr>
<td>Llano</td>
<td>19,220</td>
<td>1%</td>
</tr>
<tr>
<td>Lee</td>
<td>17,391</td>
<td>1%</td>
</tr>
<tr>
<td>Blanco</td>
<td>9,420</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: Texas State Data Center. Percentages do not sum to 100 due to rounding.

**Fastest growing counties in Texas during 2007:**
- Williamson 5th
- Travis 10th
- Hays 14th
- Burnet 21st
Fastest Growing Places in the Capital Area, 2007

1. Austin 9,332
2. Round Rock 4,604
3. Leander 3,960
4. San Marcos 3,708
5. Cedar Park 3,093
6. Georgetown 2,852
7. Hutto 2,297
8. Lakeway 1,981
9. Kyle 1,233
10. Jollyville 1,085
11. Buda 1,008

Source: Texas State Data Center
Housing Starts (SAAR), 1990-2014
Austin-Round Rock MSA

Source: IHS Global Insight. SAAR is seasonally-adjusted annual rate. Data is total number of units, single-family and multi-family.
Unemployment Rate, October 2008

US: 6.1
Texas: 5.4

Source: Texas Workforce Commission
### Unemployed in the Capital Area

<table>
<thead>
<tr>
<th>County</th>
<th>Oct-08</th>
<th>Change 2007-08</th>
<th>Change 2006-07</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bastrop</td>
<td>1,915</td>
<td>602</td>
<td>-113</td>
</tr>
<tr>
<td>Blanco</td>
<td>199</td>
<td>39</td>
<td>-2</td>
</tr>
<tr>
<td>Burnet</td>
<td>990</td>
<td>276</td>
<td>-96</td>
</tr>
<tr>
<td>Caldwell</td>
<td>960</td>
<td>317</td>
<td>-61</td>
</tr>
<tr>
<td>Fayette</td>
<td>457</td>
<td>87</td>
<td>-28</td>
</tr>
<tr>
<td>Hays</td>
<td>3,458</td>
<td>947</td>
<td>-148</td>
</tr>
<tr>
<td>Lee</td>
<td>373</td>
<td>72</td>
<td>-16</td>
</tr>
<tr>
<td>Llano</td>
<td>411</td>
<td>93</td>
<td>-28</td>
</tr>
<tr>
<td>Travis</td>
<td>25,099</td>
<td>6,927</td>
<td>-799</td>
</tr>
<tr>
<td>Williamson</td>
<td>10,090</td>
<td>3,171</td>
<td>-294</td>
</tr>
</tbody>
</table>

Unemployed people in the Capital Area reached 43,952 in October 2008, a 40% increase from one-year earlier.

Source: Texas Workforce Commission
Job Growth, Oct-07 to Oct-08

- Austin: 1.9%
- Raleigh: 1.7%
- Boston: 0.6%
- Denver: 0.1%
- San Jose: 0.1%
- Seattle: -0.1%
- Nashville: -0.3%
- Albuquerque: -0.4%
- Los Angeles: -0.9%
- San Diego: -0.9%
- San Francisco: -1.0%
- Phoenix: -2.6%

• Mild recession predicted
• Slower growth
• Fewer people moving here
• Declining affordability (?)
Quarterly Job Growth, 1990-2014
Austin-Round Rock MSA

1990-2008 average

Source: IHS Global Insight
Capital Area Region

Population

Employment

Source: U.S. Bureau of Economic Analysis
Estimated Number of People Moving from California to Capital Area, 1992-2007

1992-2004 average

Source: Internal Revenue Service
Housing prices in Austin-Round Rock increased by 5.6% between 2007Q3 and 2008Q3, ranking first among 292 metro areas tracked by OFHEO.
Housing Affordability
(Higher index reading = more affordable)

Austin-Round Rock, TX

Source: IHS Global Insight
CAPCOG Strategies
• Economic development strategy update
• County land use/transportation planning
• Implications for air quality
• Expanded regional clearinghouse
Capital Area grew from 1.3 million to 1.7 million residents between 2000 and 2008, an increase of 26 percent.

For every 100 residents added during 2000-08, 22 were in Austin and 11 were in Round Rock.

On average, 17 out of every 100 new residents were in unincorporated areas of the counties.

<table>
<thead>
<tr>
<th>City</th>
<th>Share of Population Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austin</td>
<td>22</td>
</tr>
<tr>
<td>Round Rock</td>
<td>11</td>
</tr>
<tr>
<td>Cedar Park</td>
<td>8</td>
</tr>
<tr>
<td>Kyle</td>
<td>5</td>
</tr>
<tr>
<td>Georgetown</td>
<td>5</td>
</tr>
<tr>
<td>San Marcos</td>
<td>5</td>
</tr>
<tr>
<td>Pflugerville</td>
<td>5</td>
</tr>
<tr>
<td>Leander</td>
<td>5</td>
</tr>
<tr>
<td>Hutto</td>
<td>3</td>
</tr>
<tr>
<td>Other Cities</td>
<td>12</td>
</tr>
<tr>
<td>ETJ Areas</td>
<td>2</td>
</tr>
<tr>
<td>Unincorp.</td>
<td>17</td>
</tr>
</tbody>
</table>

Source: Texas State Data Center. Table shows share of population growth in the Capital Area between 2000 and 2008 (per 100 new residents).
One out of five Capital Area residents lives in a rural area. CAPCOG’s rural population grew by 56,190 in 2000-08.

Estimated Percent Total Population Growth Occurring in Rural Areas, 2000-08

Source: Texas State Data Center. Rural includes all unincorporated areas. ETJ areas, such as Jollyville and Brushy Creek, are counted as urban.
Share of Total Nonfarm Employment in Austin-Round Rock MSA, 1990-2014

- Government: 21%
- Manufacturing: 14%
- Professional Services: 11%
- Retail: 7%

Source: IHS Global Insight
Geospatial Data

CAPCOG provides vector data (e.g., point, line, or polygon) as an ESRI geodatabase and an ESRI shapefile, and raster data (e.g., orthoimagery, digital elevation models, etc.) as a MsSID file. NEW FEATURE! Now users with Google Earth can view CAPCOG's geospatial data by downloading KMZ files. Shapefiles and SID images may be viewed using free software such as ESRI's ArcExplorer (Version 2 for Windows) or LizardTech's ExpressView (SID images only). The data developed and/or distributed by CAPCOG is in a NAD 83, State Plane, Texas Central Zone, feet map projection and coordinate system. Refer to the metadata for information regarding a specific data layer. CAPCOG provides data to the general public under certain terms and conditions. Review our Data License for more information.

Our most requested datasets are available to the public at no charge. Simply right-click on the hyperlink for the data format of your choice and select “Save Target As...”. CDs, DVDs, or prints of these datasets are available to the public at cost of reproduction plus labor and shipping. Please see our fee schedule for more information. To order a CD, DVD, or print, please contact CAPCOG Center for Regional Development at (512) 916-6000 or Carolyn Defore.

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Questions?
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