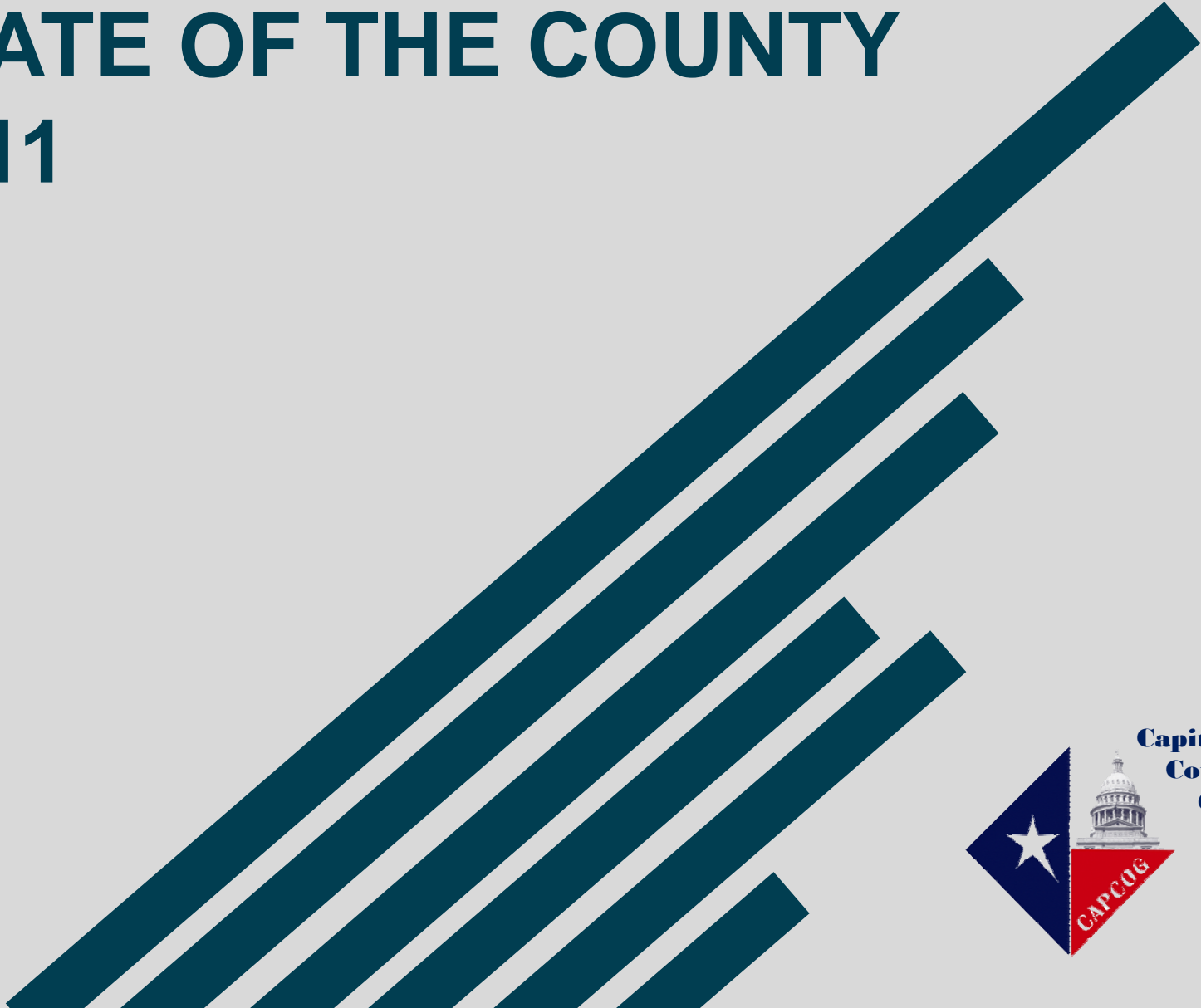
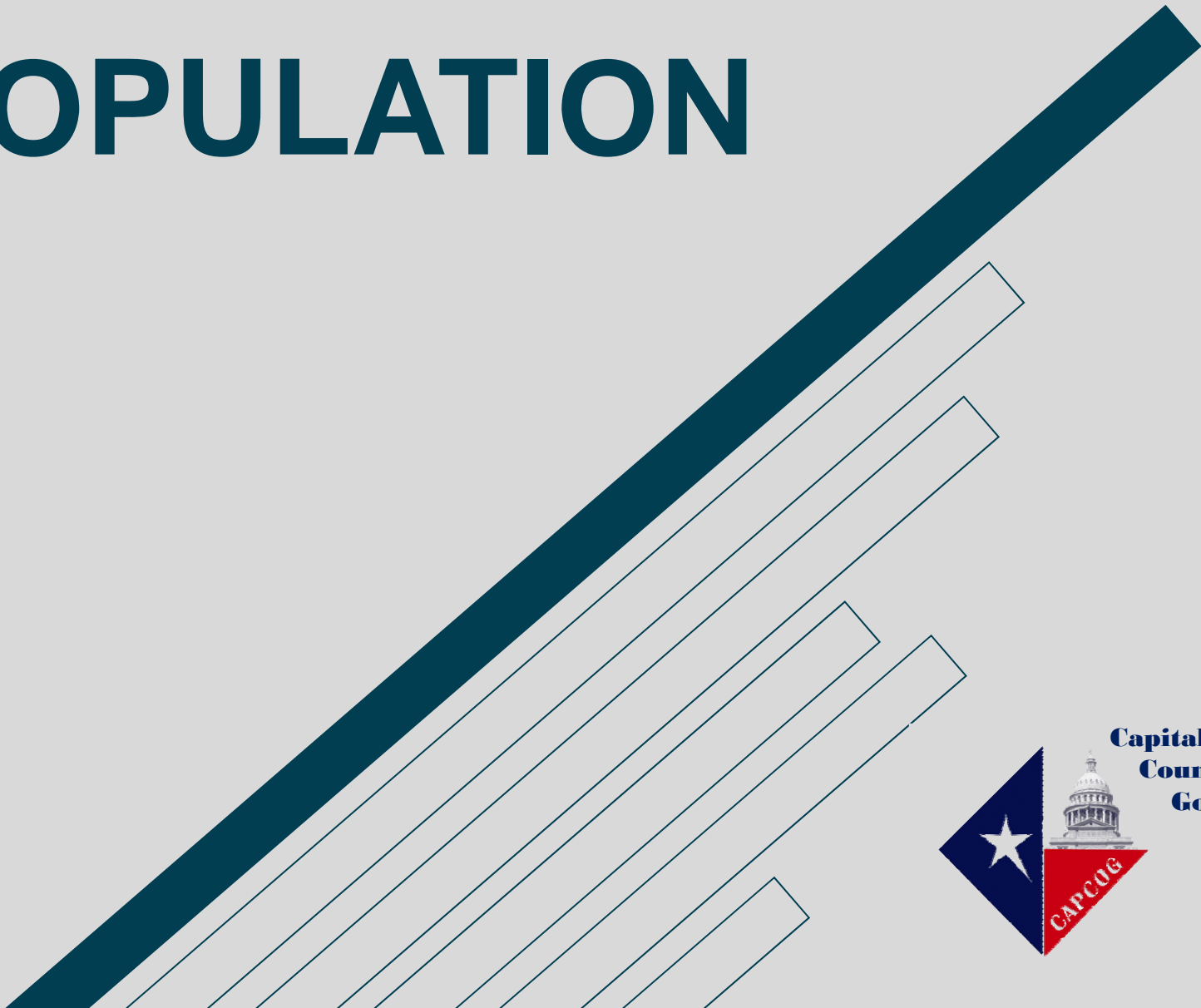


BURNET STATE OF THE COUNTY 2011



POPULATION



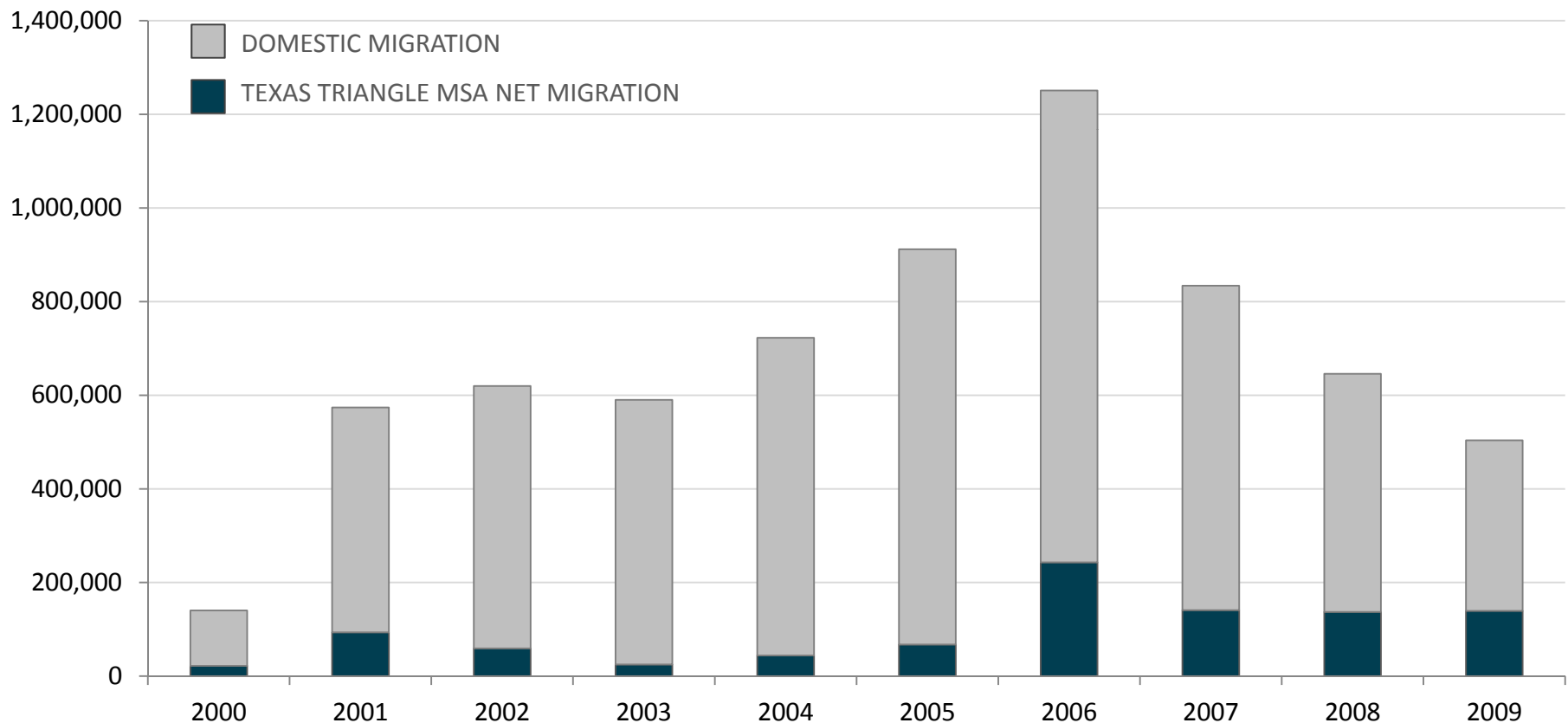
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Governments**

POPULATION – THE RISE OF TEXAS

During the past decade, the State of Texas has proved tremendously attractive to residents living outside the state. While migration in the U.S. has dropped significantly since the beginning of the recession, Texas continues to lure people from across the country. In 2009, nearly one in four people who moved did so to one of four metropolitan areas—Austin, Dallas, Houston, and San Antonio.



U.S. INTERNAL MIGRATION PATTERNS (2000 – 2009)



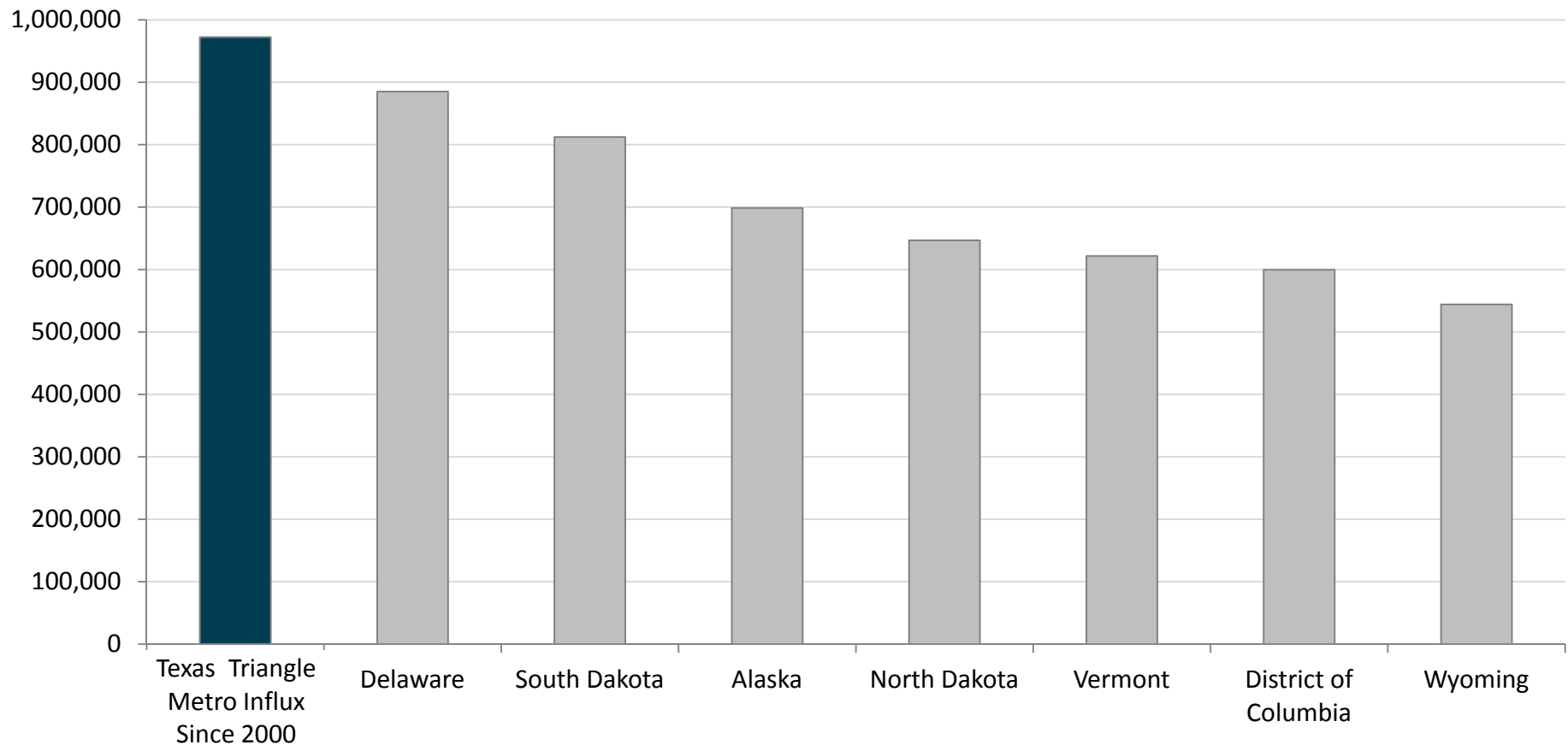
SOURCE: U.S. CENSUS BUREAU

POPULATION – THE RISE OF TEXAS

Since 2000, more than 972,000 people have moved to the Texas Triangle's four major metropolitan areas—Austin, Dallas, Houston, and San Antonio. To put this number in perspective, the population of Delaware is just 885,000. In fact, the number of new residents that have moved to the Texas Triangle during the past decade is greater than the population of six states and the District of Columbia.



TEXAS MIGRATION SINCE 2000 COMPARED TO STATE POPULATIONS



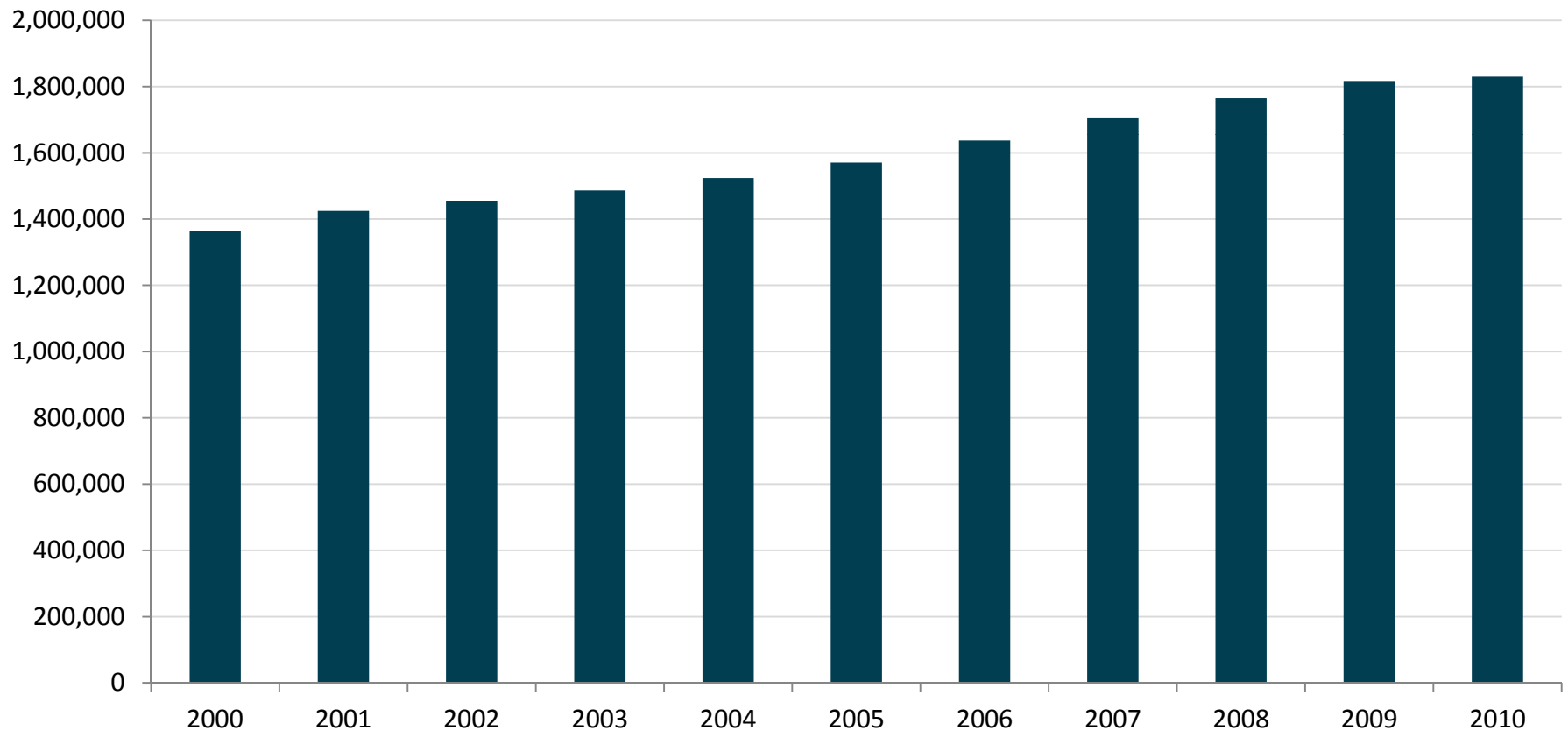
SOURCE: U.S. CENSUS BUREAU

POPULATION – CAPCOG REGION GROWTH

The CAPCOG region has experienced significant growth during the past decade. Since 2000, the population of the 10-County CAPCOG region has jumped from 1.36 million to 1.83 million—an increase of more than 34 percent. During this same period, the population of the U.S. increased just 9.7 percent and the population of Texas increased 20.6 percent.



POPULATION OF 10-COUNTY CAPCOG REGION



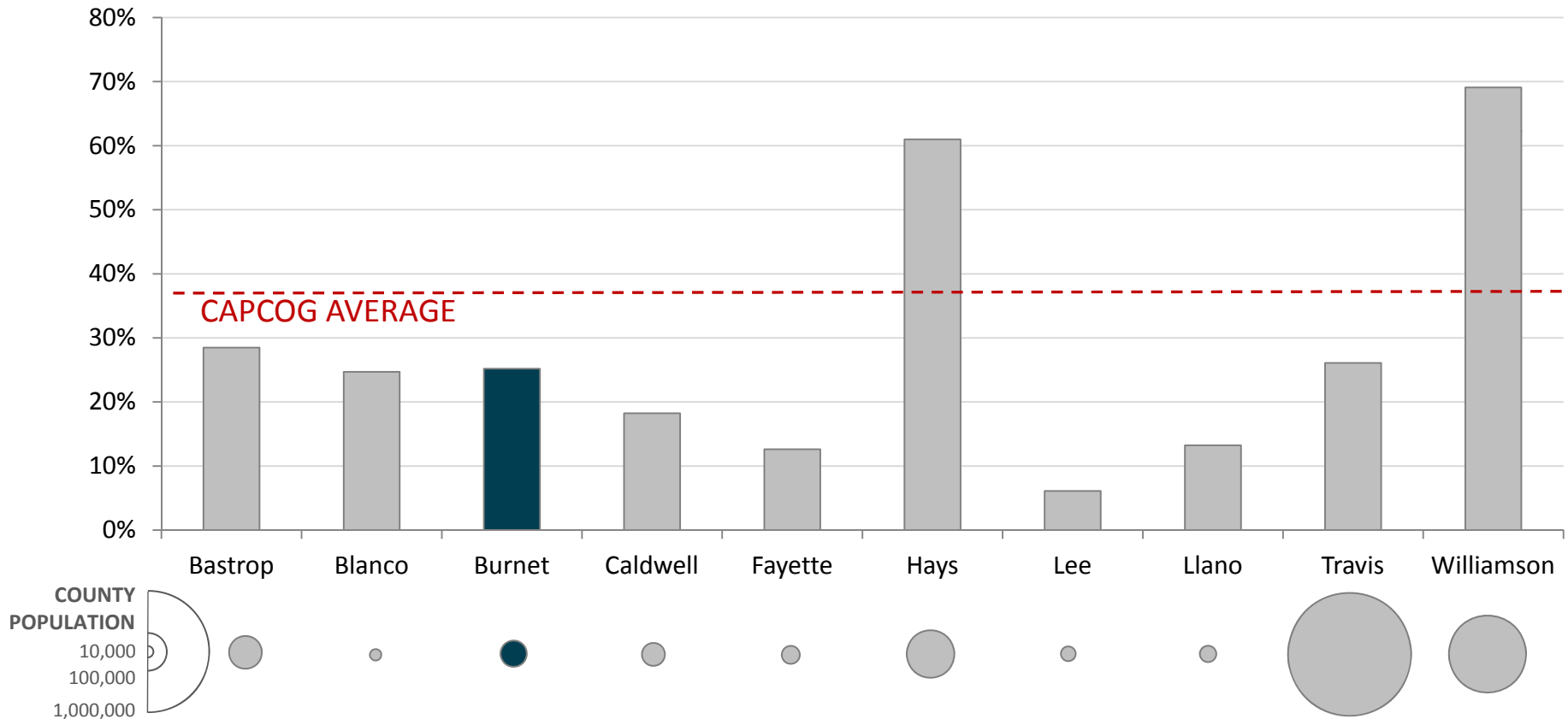
SOURCE: U.S. CENSUS BUREAU

POPULATION – CAPCOG REGION GROWTH

Within the CAPCOG region, Burnet County experienced the fifth fastest rate of growth during the past decade. Since 2000, the population of Burnet County has increased by 25 percent. The population of Travis County, the traditional engine of growth within the region, increased by 26 percent during the past decade (although the County added the greatest number of new residents).



POULATION GROWTH OF 10-COUNTY CAPCOG REGION (2001 TO 2010)



SOURCE: U.S. CENSUS BUREAU

POPULATION - COMPONENTS OF POPULATION CHANGE

The spectacular growth of the CAPCOG region is largely due to massive levels of migration. In America, for example, new migrants to the country account for little more than a third of all population growth. Instead, most population gains are attributable to natural increases (births minus deaths). Within the CAPCOG region, however, migration is responsible for two-thirds of all population growth. Within Burnet County, migration now accounts for more than 90 percent of all population gains.



POPULATION GROWTH : MIGRATION VS. NATURAL INCREASE (2000 – 2009)

U.S.

MIGRATION 36.1%

NATURAL INCREASE 63.9%

CAPCOG

MIGRATION 66.5%

NATURAL INCREASE 33.5%

BURNET COUNTY

MIGRATION 92.7%

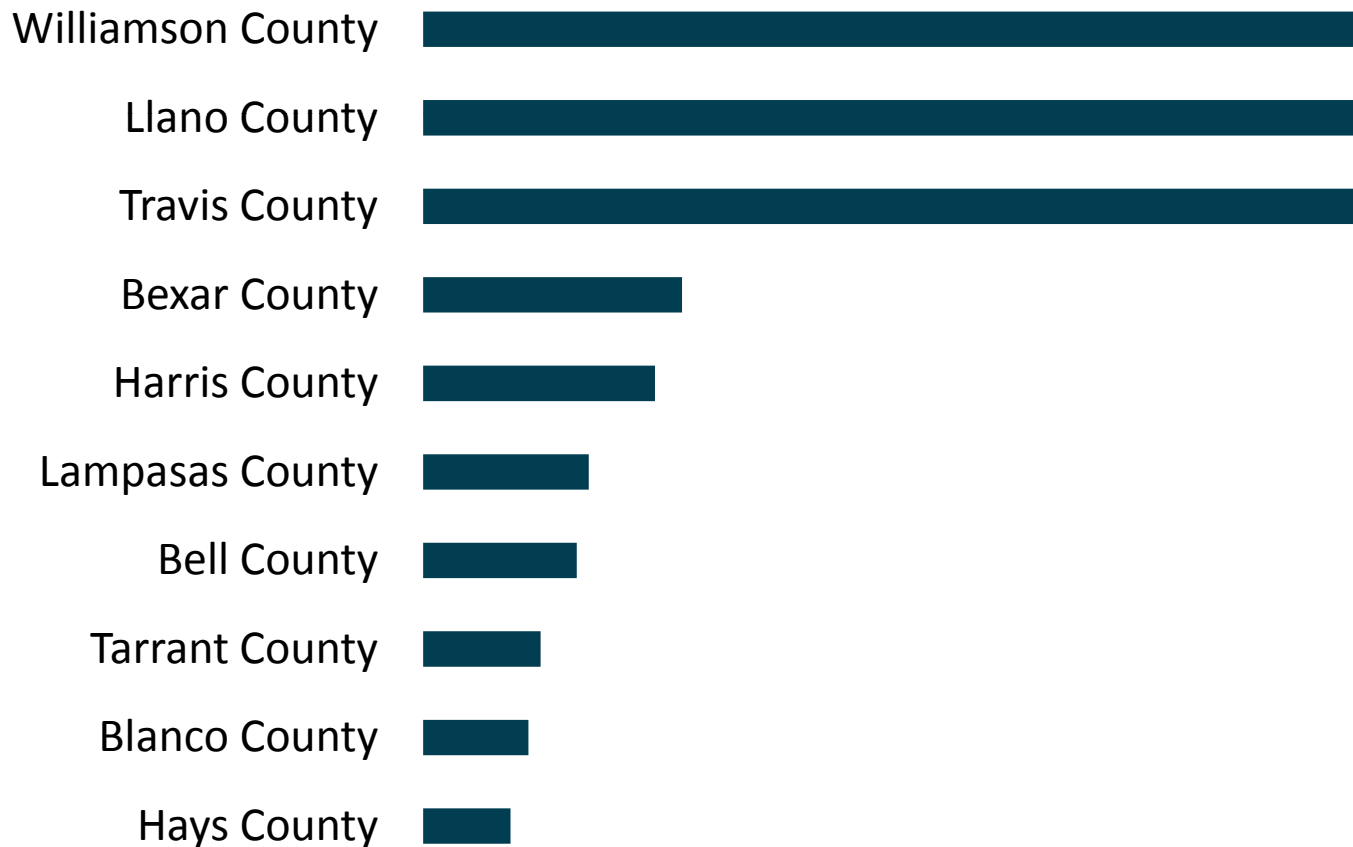
NATURAL INCREASE 7.3%

POPULATION – BURNET COUNTY IN-MIGRATION PATTERNS

Within the region, Travis and Williamson County serves as a giant funnel for migrants. Each year, thousands of people move to Travis and Williamson County from major metropolitan areas throughout the country. In turn, many of these people later move to surrounding counties. Burnet County is a direct beneficiary of this second-wave migration dynamic. Between 2008 and 2009, the overwhelming share of migrants to Burnet County were from three neighboring jurisdictions—Williamson, Travis, and Llano Counties.



ORIGIN OF IN-MIGRANTS TO BURNET COUNTY (2008-2009)

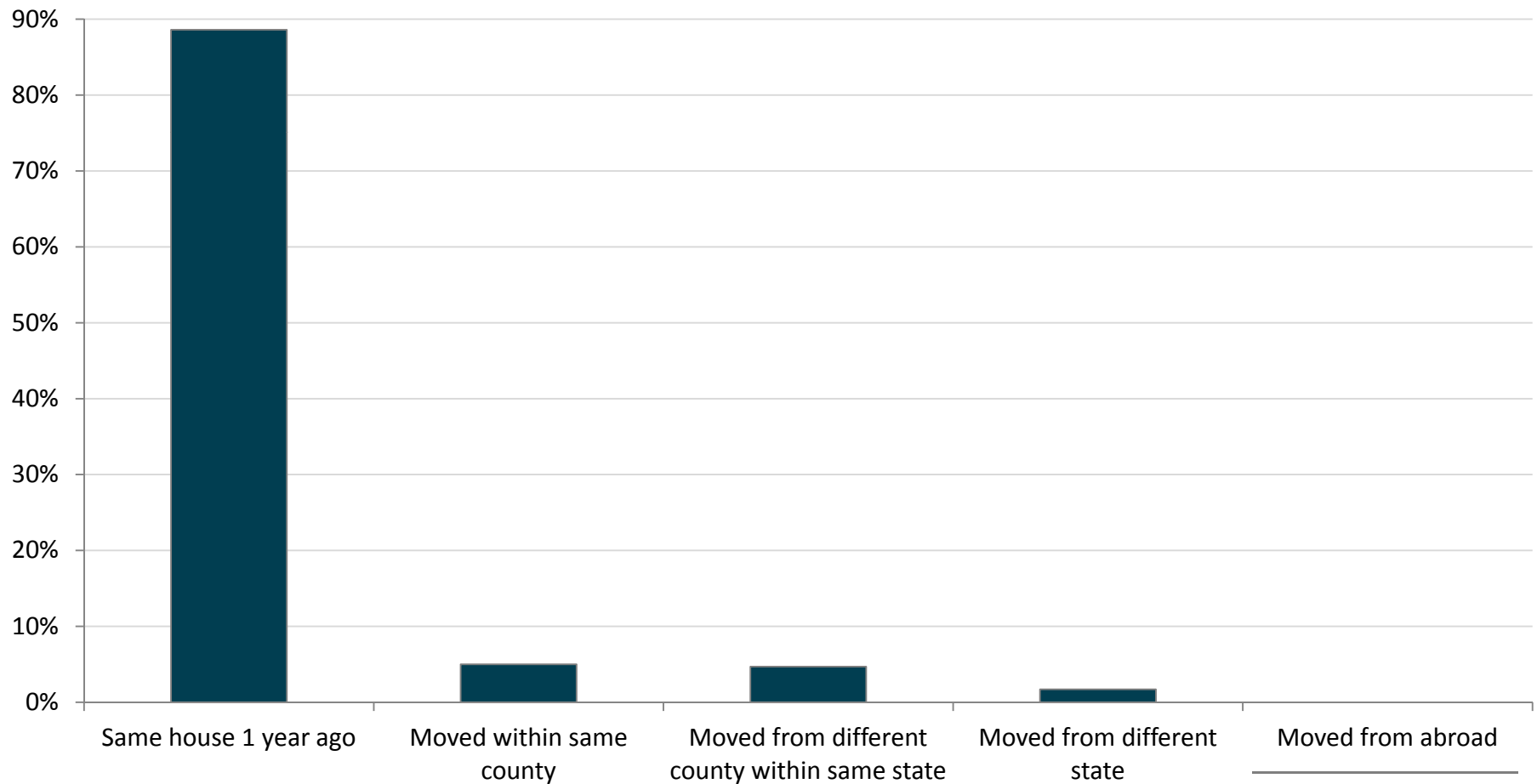


POPULATION – CAPCOG REGION GROWTH

Burnet County continues to lure new residents each year. Between 2008 and 2009, 11 percent of all residents within Burnet County had lived in the community for less than a year. Most of the new residents came from other counties in Texas, though out-of-state residents accounted for nearly two percent of the total population of Burnet County in 2010.



GEORGAPHIC MOBILITY OF POPULATION AGE 1 AND OLDER (2008 TO 2010)



SOURCE: U.S. CENSUS BUREAU

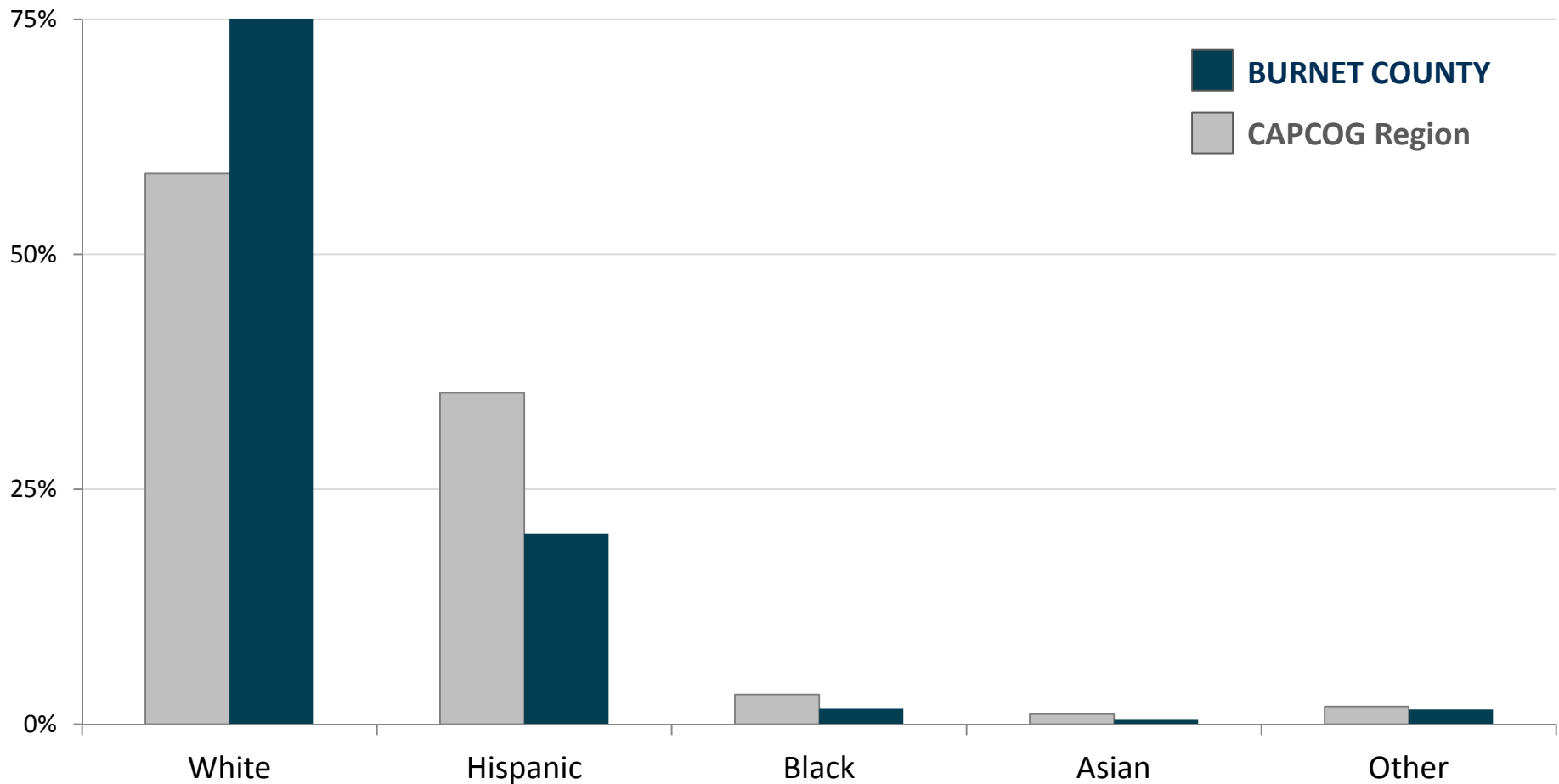
PEOPLE



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PEOPLE - RACIAL & ETHNIC COMPOSITION - 2010

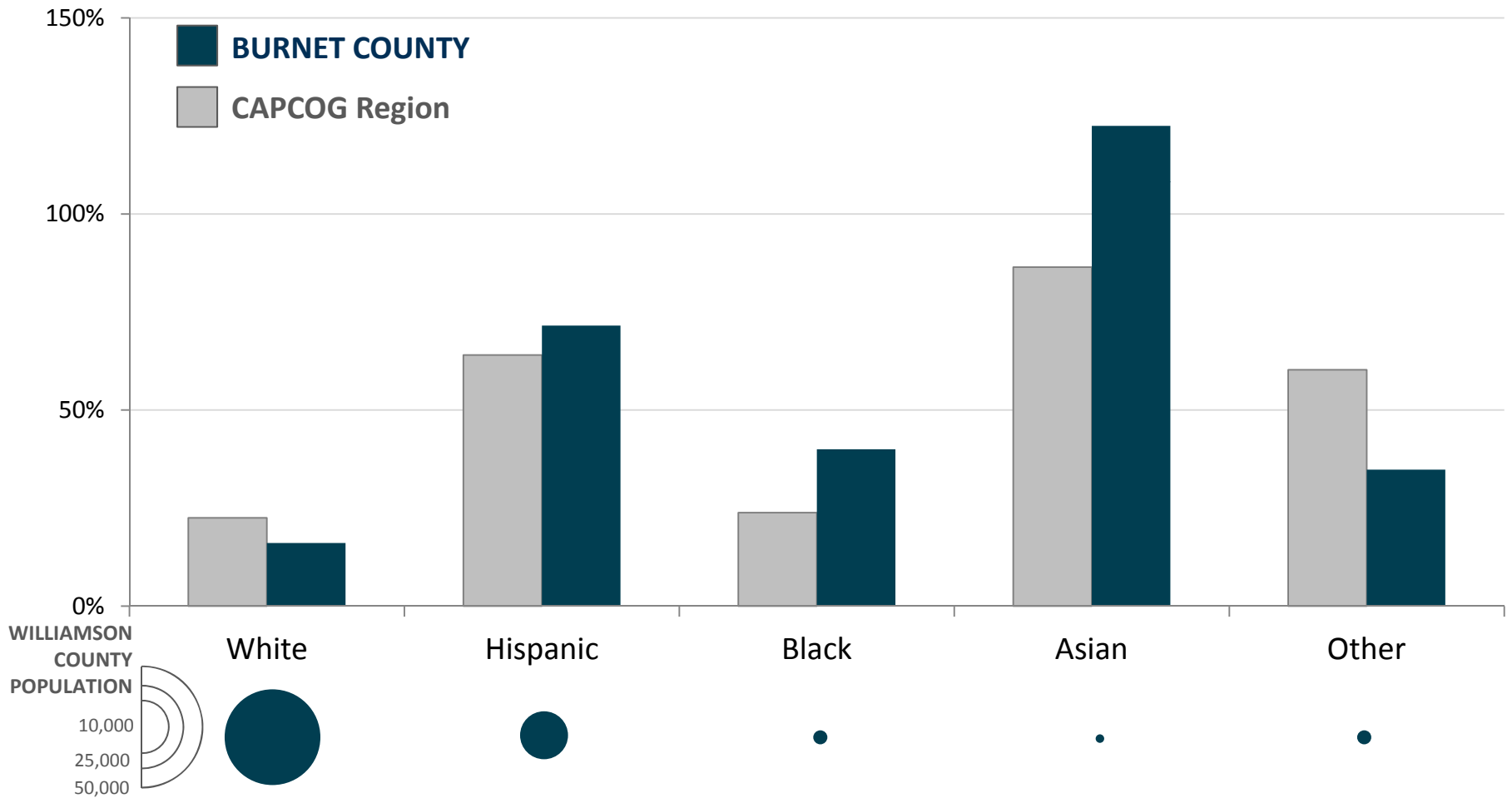
The racial and ethnic composition of Burnet County differs slightly from the regional average. The proportion of White residents in Burnet County, for example, is higher than the average of the entire CAPCOG region. In contrast, Hispanic residents represent a smaller share of Burnet County's population than the regional average. Burnet County also features a lower proportion of other minority groups than the overall region.



SOURCE: U.S. CENSUS BUREAU

PEOPLE - GROWTH BY RACIAL & ETHNIC GROUP (2000 – 2010)

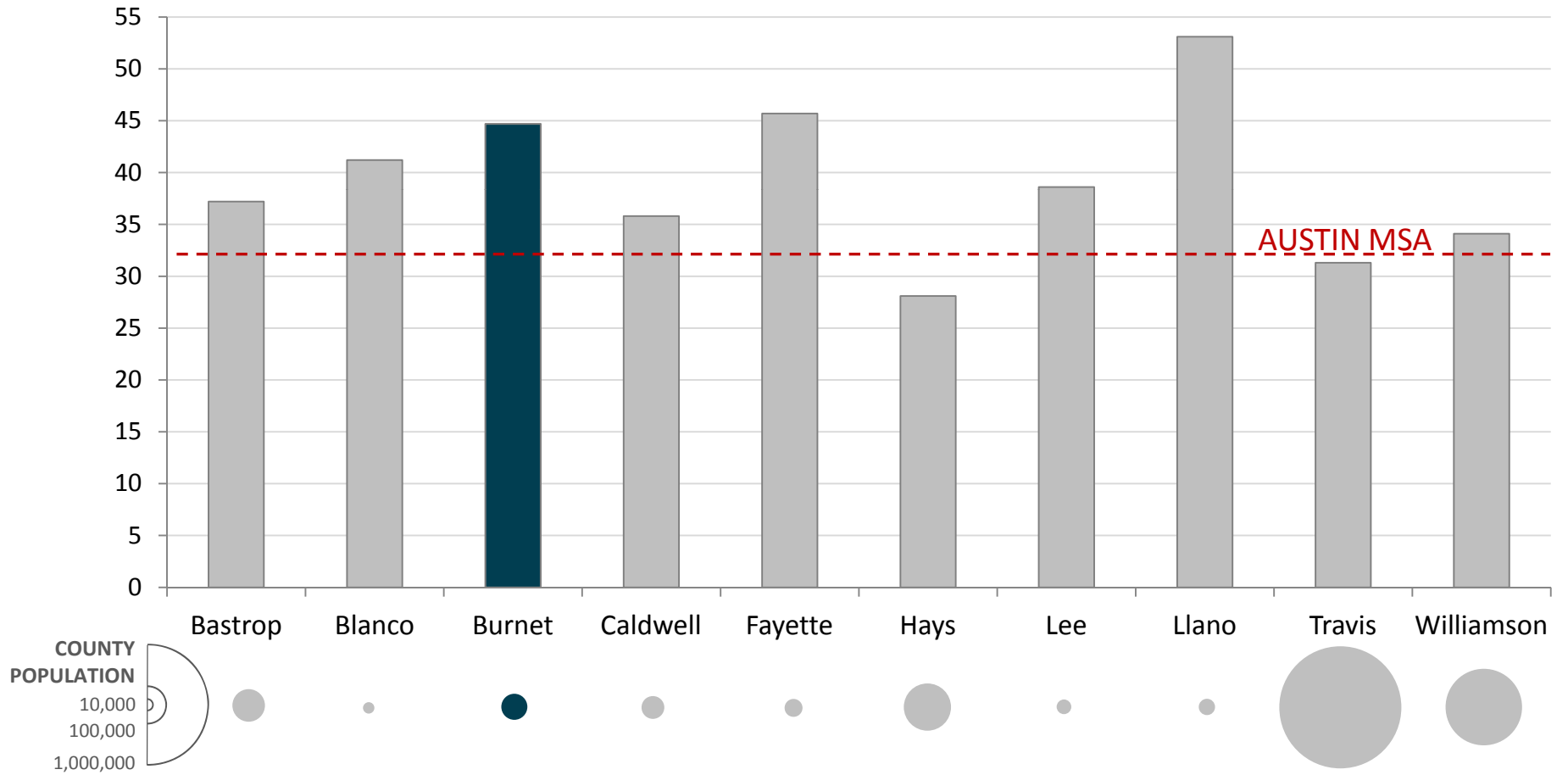
Every racial and ethnic group within Burnet County is experiencing growth. Asian residents are the fastest-growing racial/ethnic group within Burnet County; since 2000, this population has increased more than 120 percent. Hispanic residents are the second-fastest growing single racial/ethnic group in Burnet County. During the past decade, this population has increased more than 70 percent.



SOURCE: U.S. CENSUS BUREAU

PEOPLE – MEDIAN AGE (2005-2009)

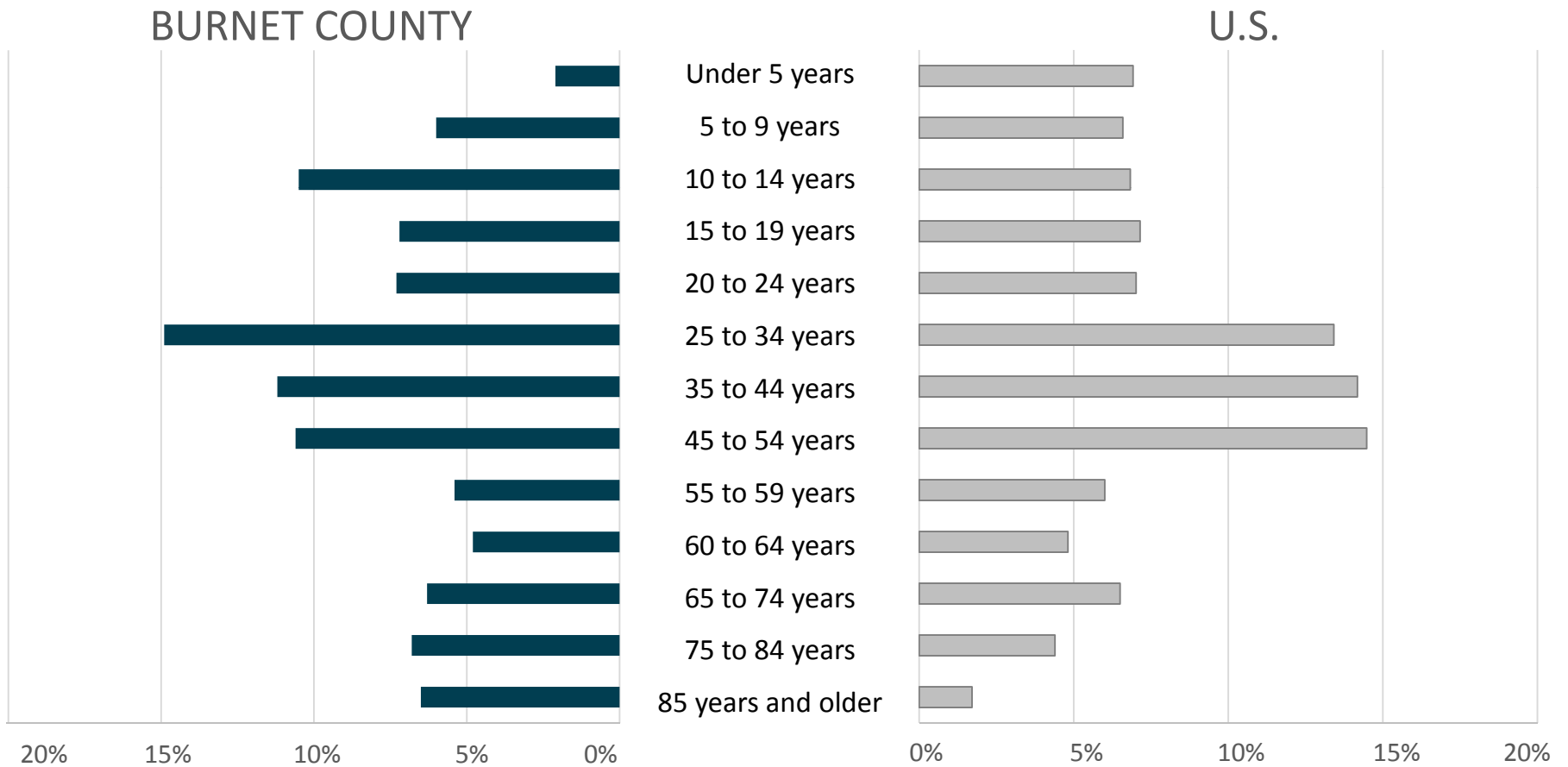
Burnet County is the third-oldest county in the CAPCOG region, with a median age of 44.7—approximately 8 years older than the national figure.



SOURCE: U.S. CENSUS BUREAU

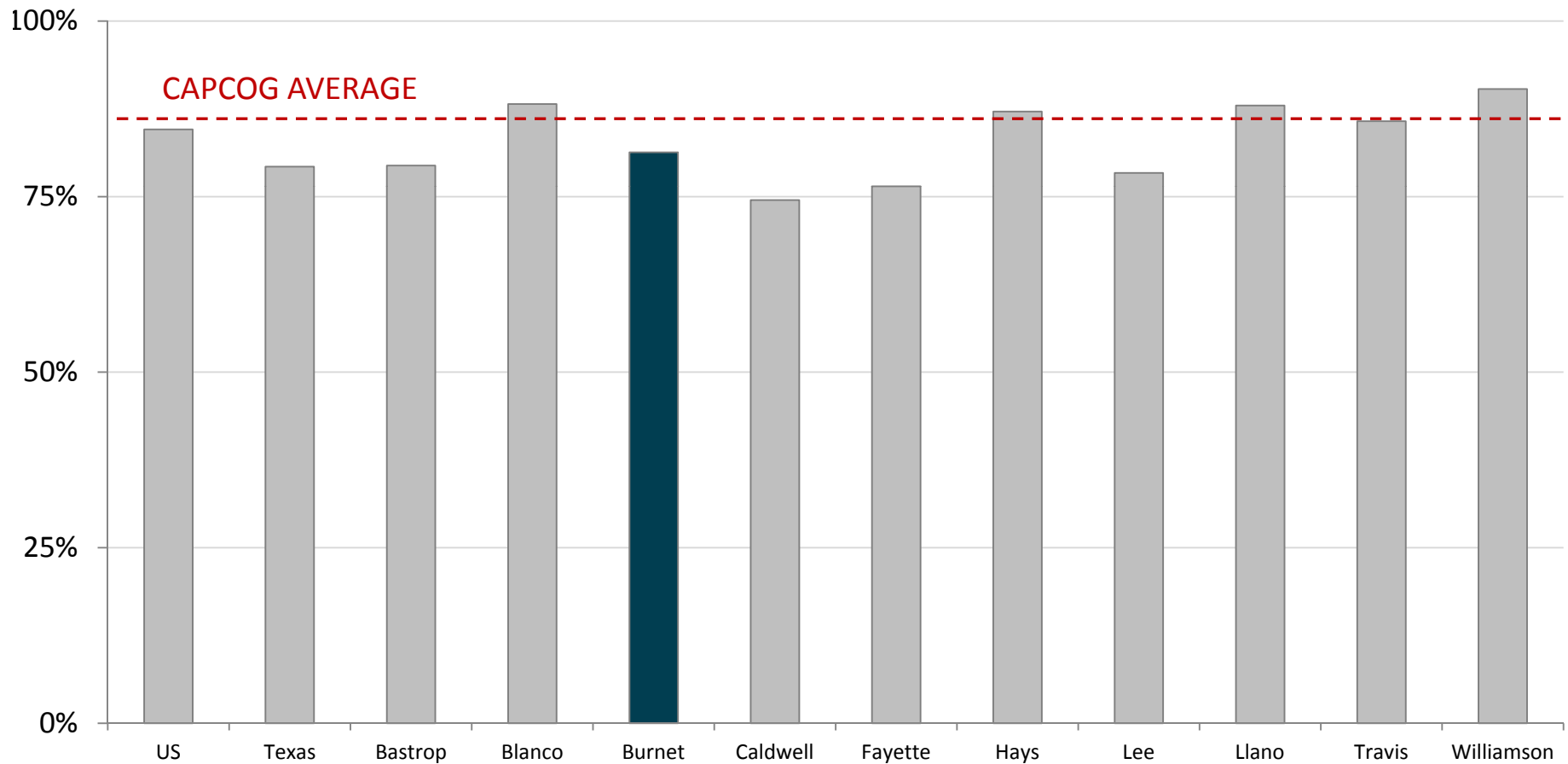
PEOPLE – AGE DISTRIBUTION (2008-2010)

The relative maturity of Burnet County is further reflected in the age distribution of the County. For example, Burnet County features fewer residents between the ages of 35 and 59 than the U.S. average. In contrast, Burnet County features a higher proportion of residents age 60 and older than the U.S. average. Still, there are signs that Burnet County may be attracting more young families; the county has a higher proportion of residents between the ages of 10–14 years and 25-34 years than the U.S. average.



PEOPLE – H.S. EDUCATIONAL ATTAINMENT (2005-2009)

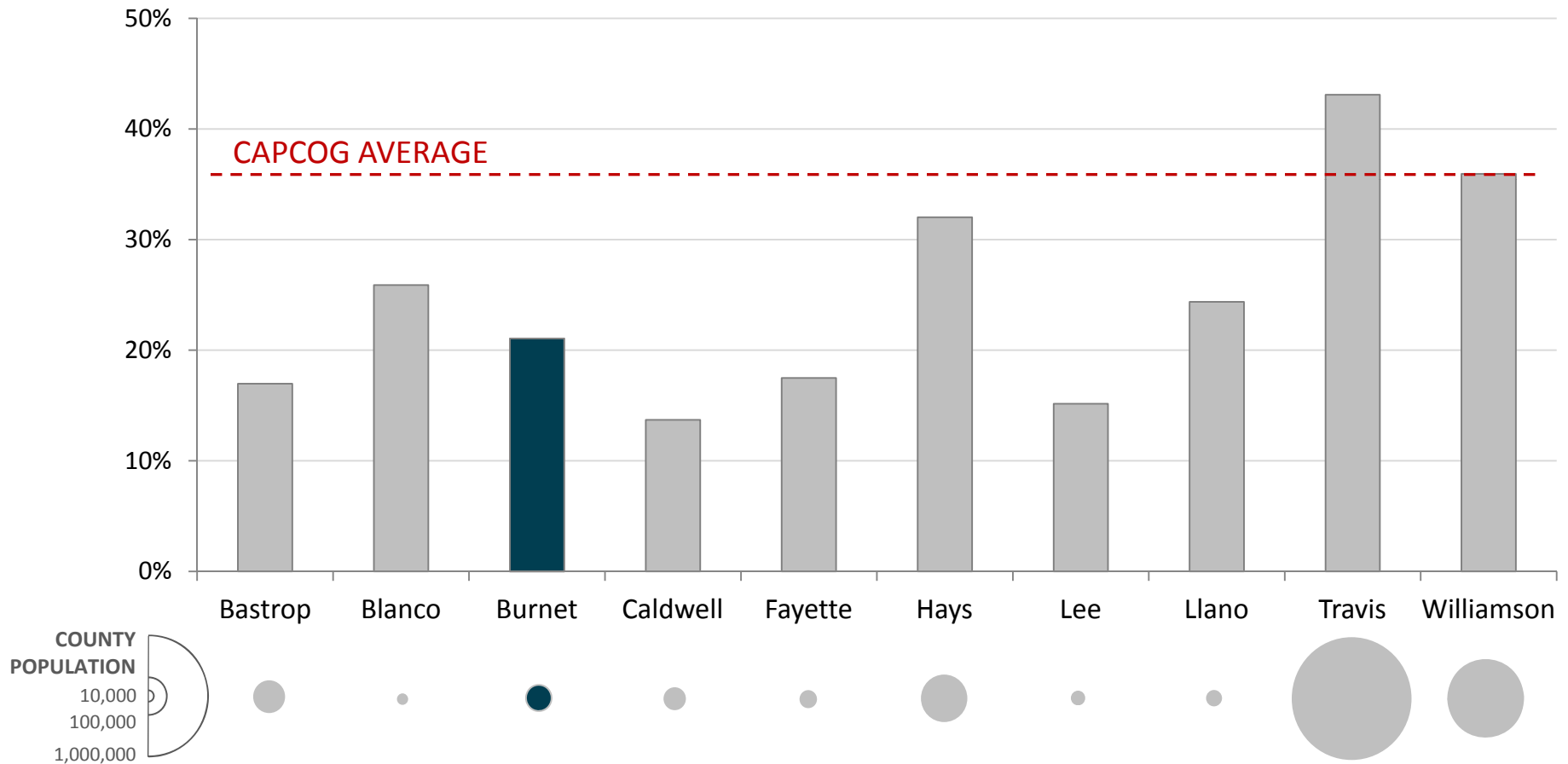
Approximately 81 percent of all residents 25 years and older within Burnet County possess a high school (or equivalent) degree. Within the CAPCOG region, Burnet County has the sixth highest level of high school educational attainment. While the proportion of residents with a high school degree in Burnet County is higher than the Texas average, it remains slightly below the U.S. average.



SOURCE: U.S. CENSUS BUREAU

PEOPLE – COLLEGE EDUCATIONAL ATTAINMENT (2005-2009)

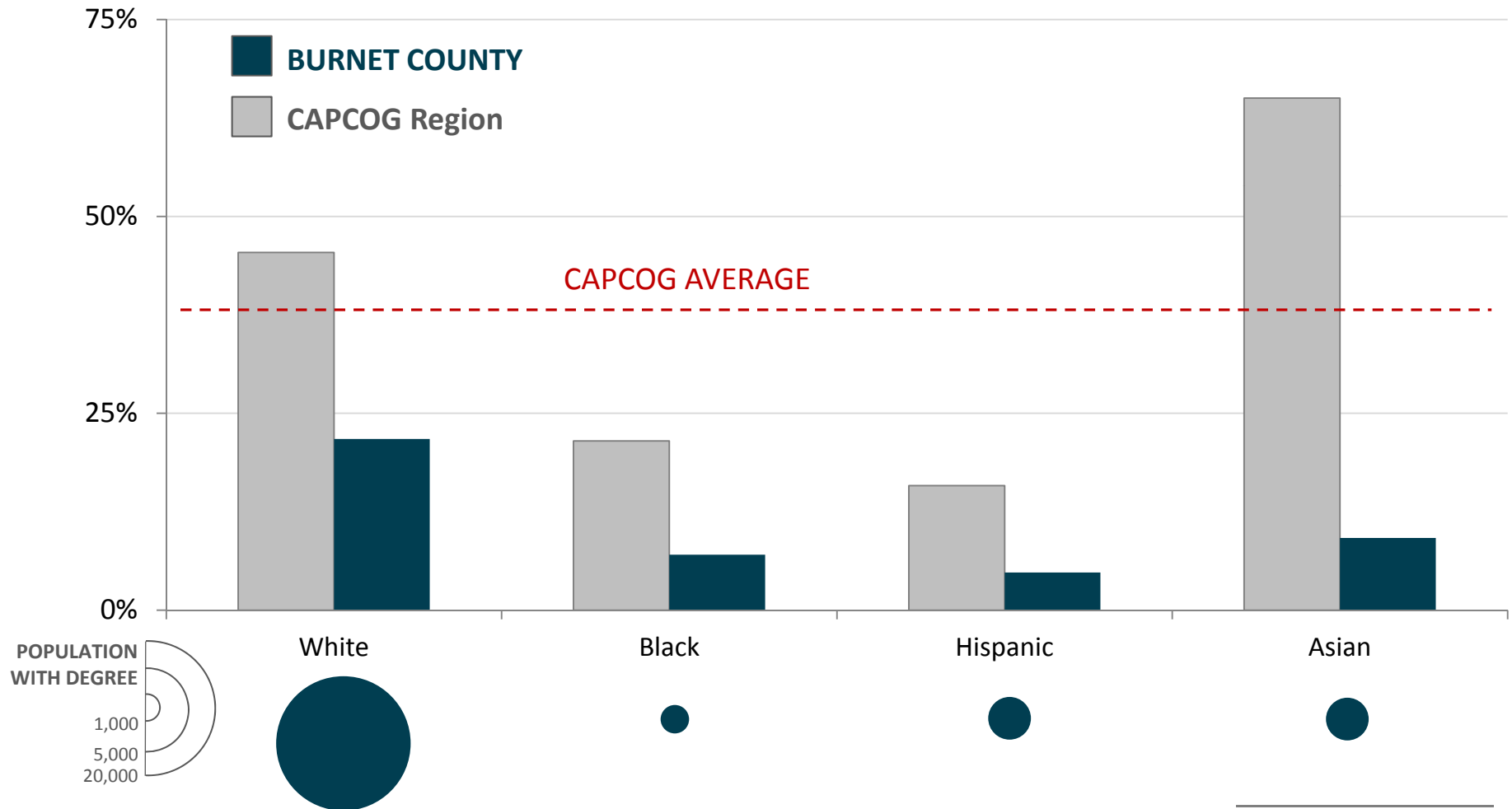
Approximately 21 percent of Burnet County residents over the age of 25 possess a 4-year college education, the sixth-highest level of college educational attainment within the CAPCOG region and approximately six percentage points lower than the national average.



SOURCE: U.S. CENSUS BUREAU

PEOPLE - EDUCATIONAL ATTAINMENT BY RACE (2005-2009)

Within Burnet County (and the CAPCOG region), there are striking differences in the educational attainment levels of individual racial and ethnic groups. While 22 percent of Asian residents age 25 years and older within Burnet County possess a college degree, for example, the figure is less than 5 percent for Hispanic residents. Given the growth trajectories of individual racial and ethnic groups, these differences have profound consequences for our region.



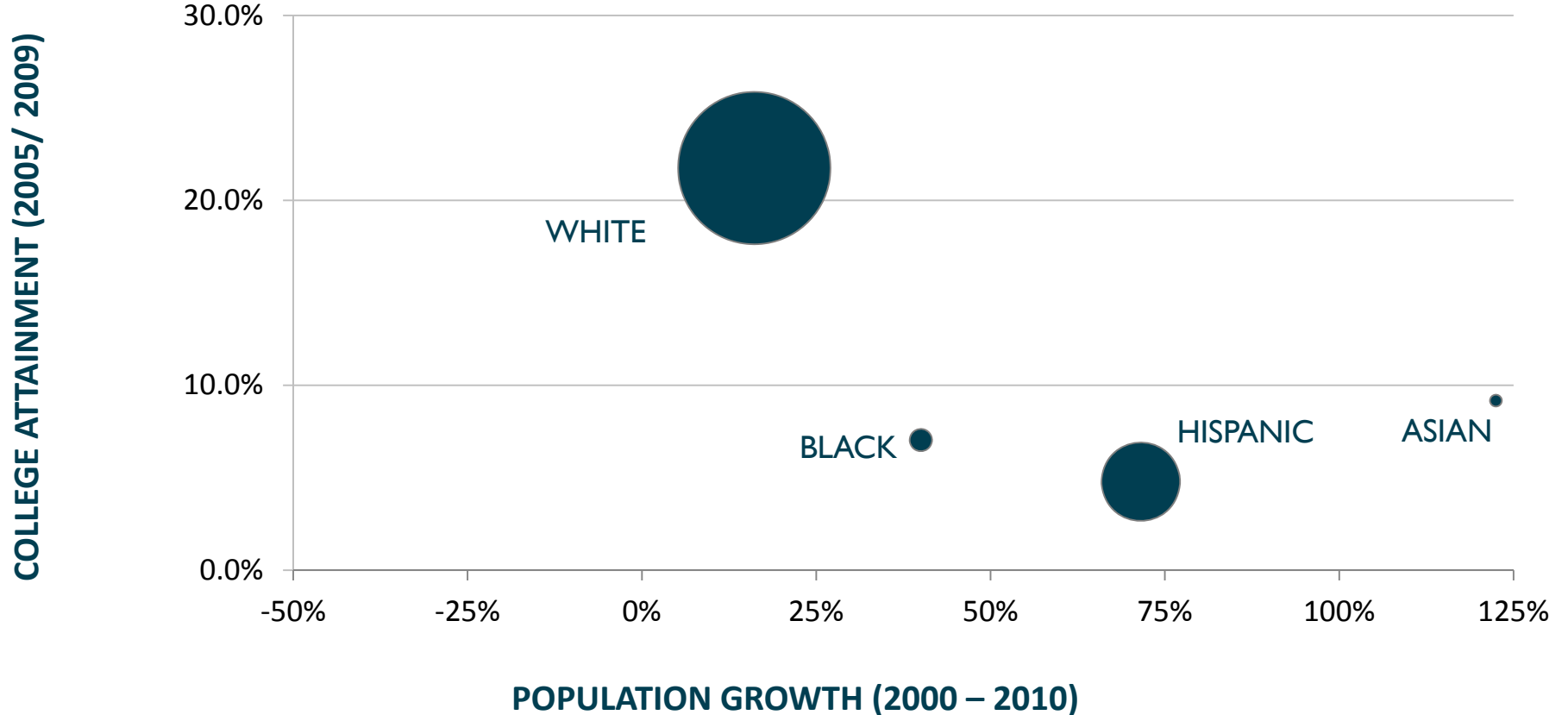
SOURCE: U.S. CENSUS BUREAU

PEOPLE – EDUCATION & POPULATION GROWTH

The growth dynamics of individual racial and ethnic groups—combined with wide discrepancies in the rate of college educational attainment—suggest that maintaining its current level of educational attainment may be difficult for Burnet County (as well as the rest of the CAPCOG region). Unless our region can increase college educational attainment of the fastest growing racial and ethnic groups, the overall rate of educational attainment within Burnet County will likely stagnate.

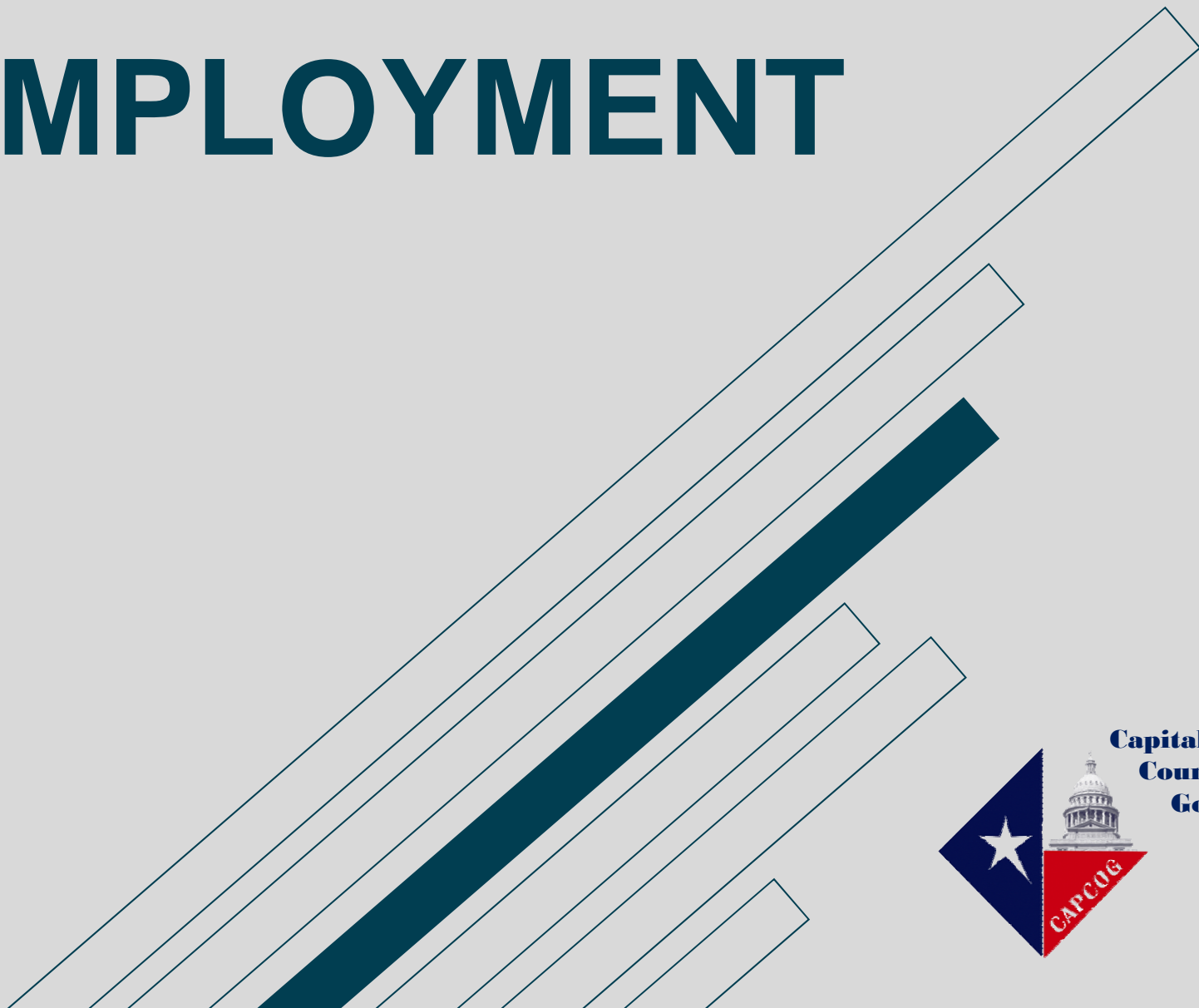


**GROWTH IN COLLEGE ATTAINMENT (2001 – 2009) VS. POPULATION GROWTH (2010)
VS. POPULATION SIZE (2010) BURNET COUNTY**



SOURCE: U.S. CENSUS BUREAU

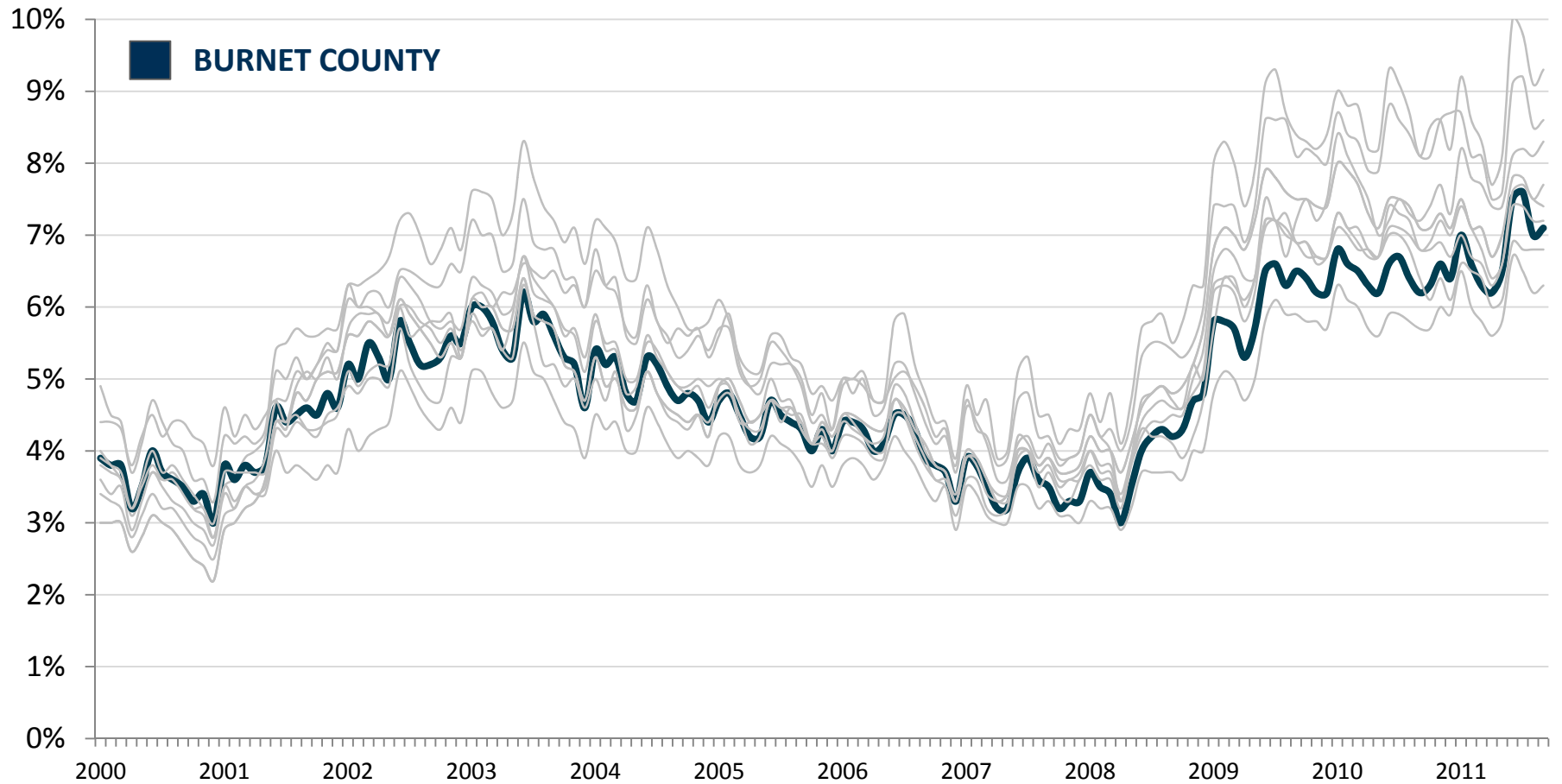
EMPLOYMENT



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UNEMPLOYMENT – 2000 - 2010

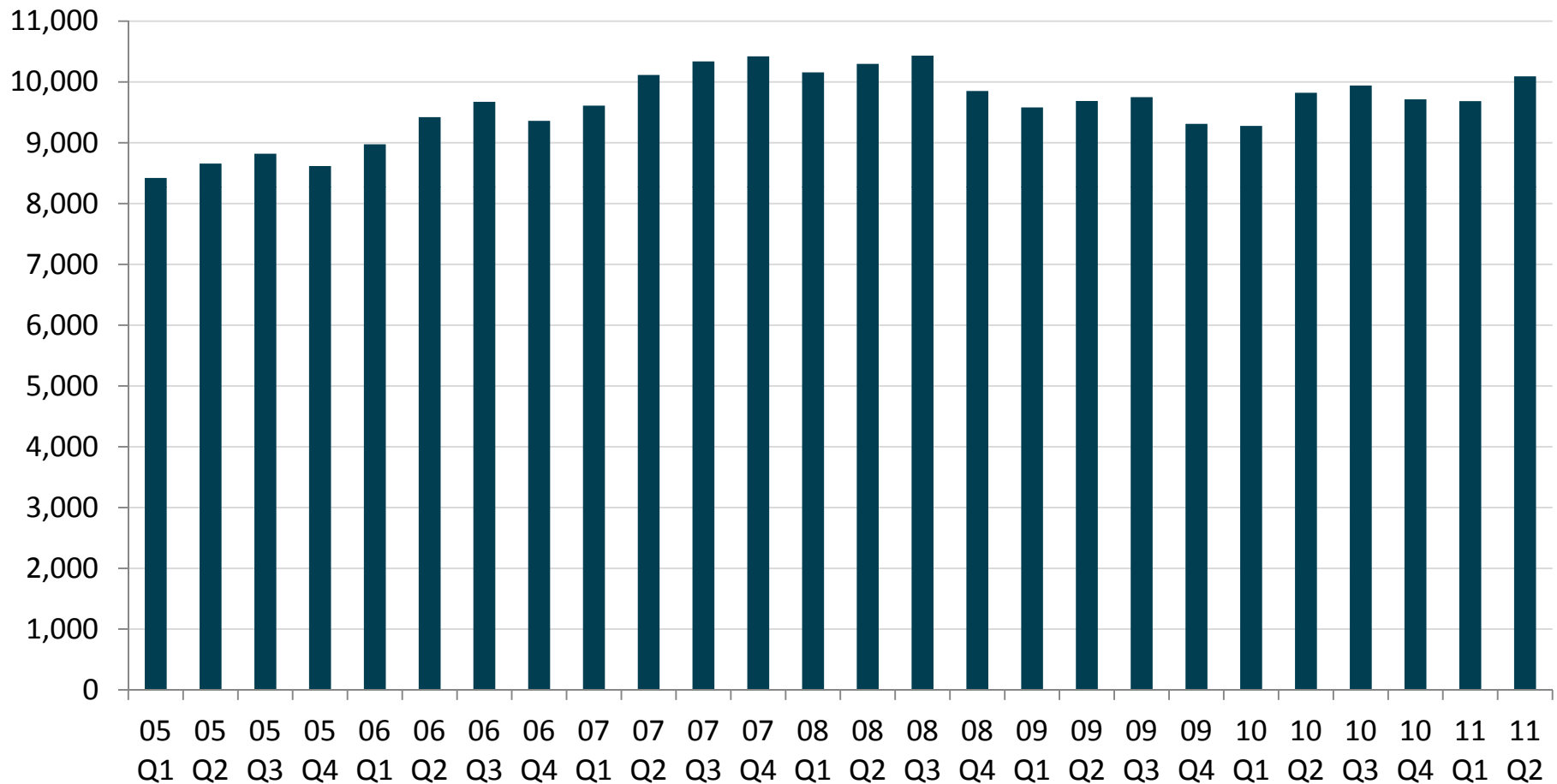
During the past decade, the unemployment rate of Burnet County has remained among the lowest in the CAPCOG region. Today, the unemployment rate in Burnet County is approximately 7 percent, below the national average and regional average.



SOURCE: U.S. BUREAU OF LABOR STATISTICS

EMPLOYMENT – 2005 - 2010

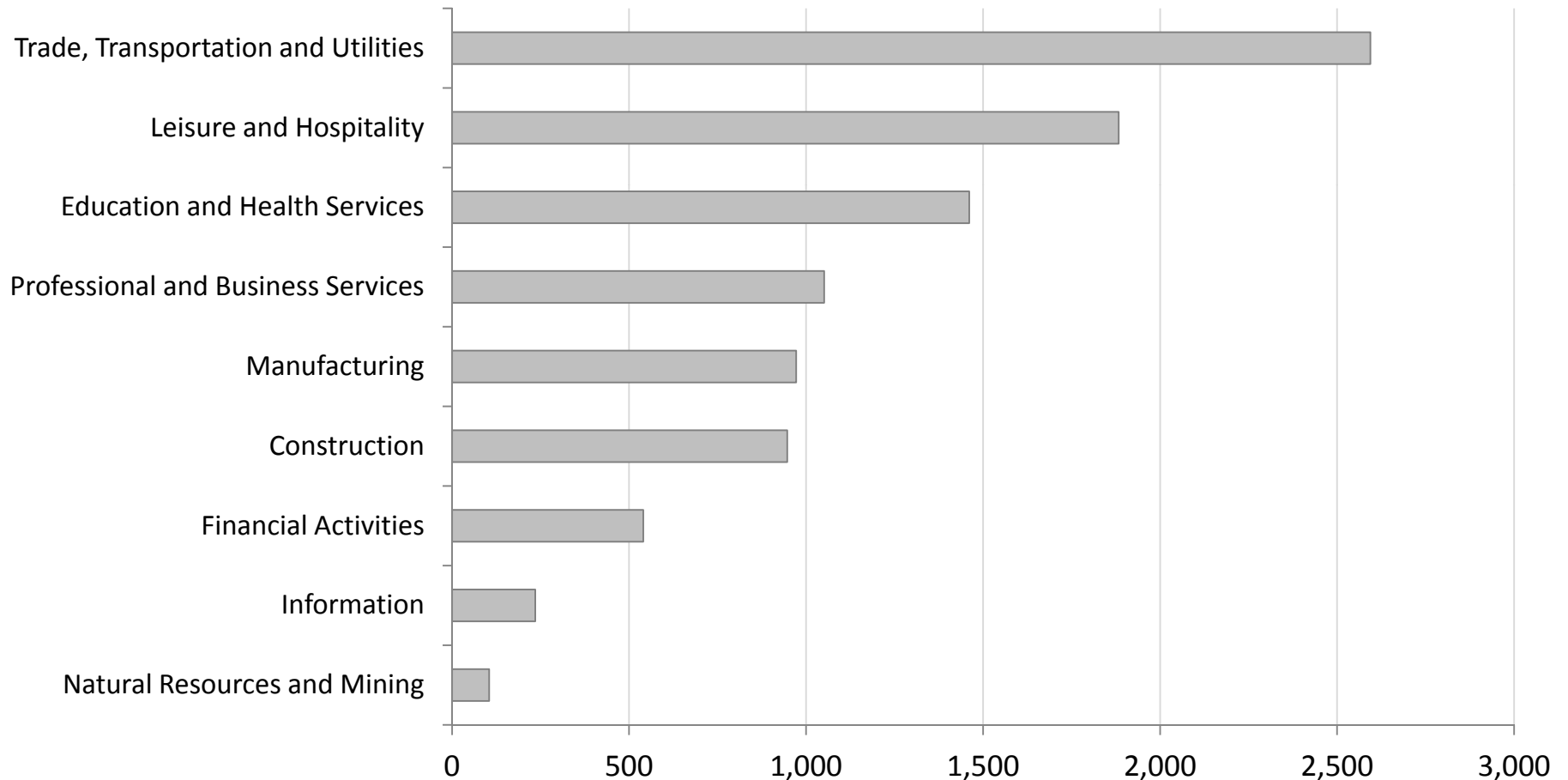
Since 2005, employment in Burnet County has grown from approximately 8,400 to more than 10,000—an increase of 20 percent. In many regions within the country, employment levels today remain significantly below their pre-recession high. Burnet County, however, has recovered nearly all the jobs lost during the recession.



SOURCE: U.S. BUREAU OF LABOR STATISTICS

BURNET COUNTY EMPLOYMENT BY INDUSTRY (2011)

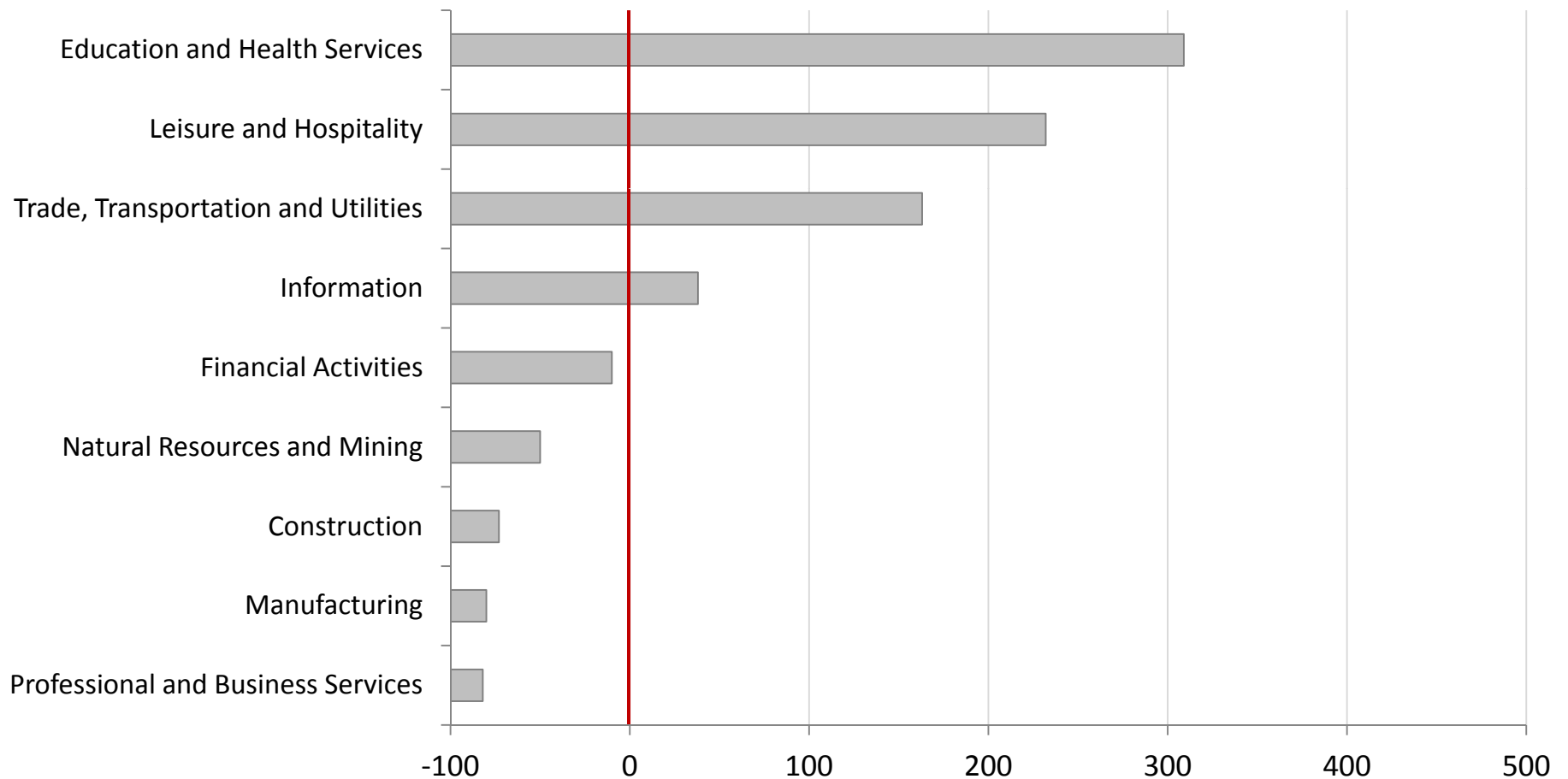
With more than 2,500 workers, Trade, Transportation & Utilities is the largest employment category within Burnet County. Leisure & Hospitality, with approximately 1,900 workers, is the second-largest employment category. The third-largest employment category in Burnet County, Education & Health Services, employs nearly 1,500 workers.



SOURCE: U.S. BUREAU OF LABOR STATISTICS

BURNET COUNTY EMPLOYMENT BY INDUSTRY (2006 – 2010)

During the past five years, the Education & Health Services employment sector has added the greatest number of jobs within Burnet County. Leisure & Hospitality added the second-greatest number of jobs during this period. Trade, Transportation, & Utilities added the third-greatest number of jobs.



SOURCE: U.S. BUREAU OF LABOR STATISTICS

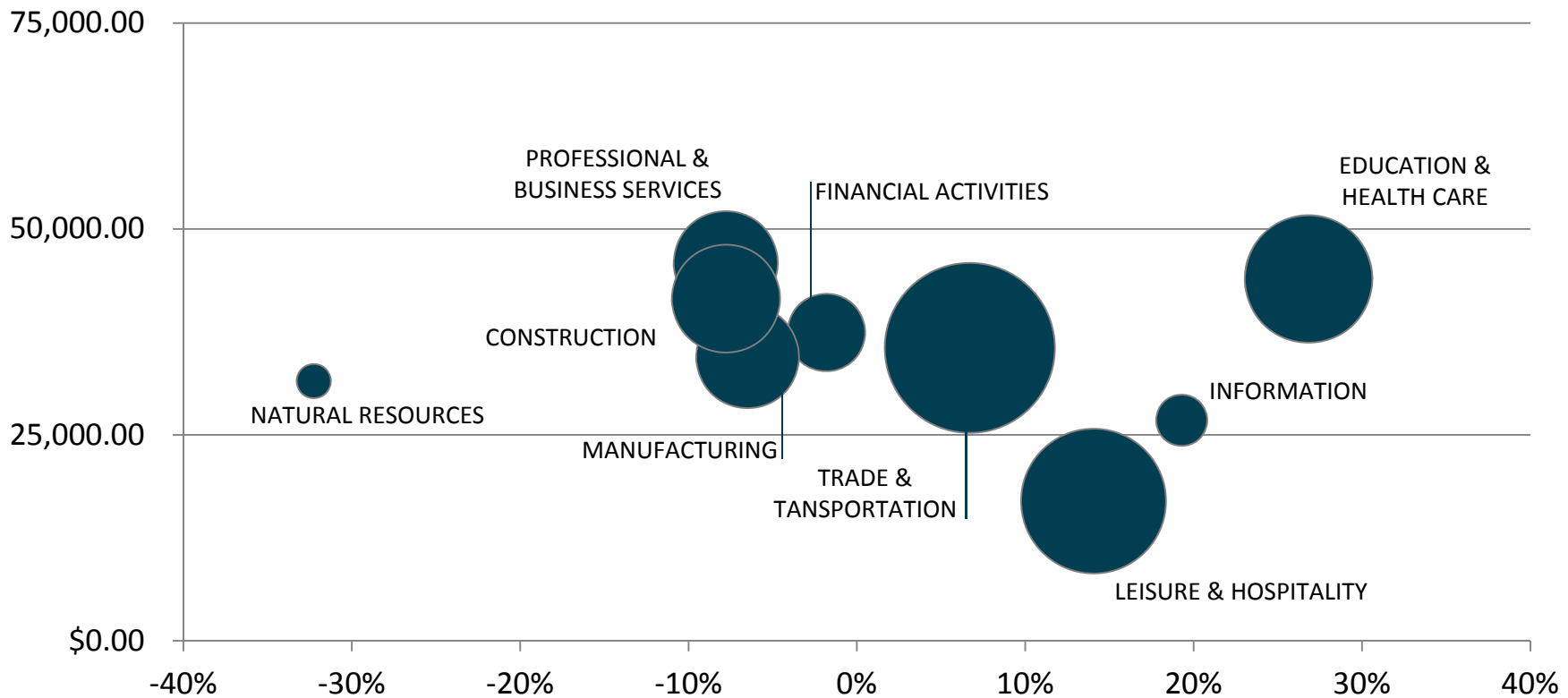
BURNET COUNTY DYNAMICS OF EMPLOYMENT GROWTH

One of the more troubling employment trends within the CAPCOG region is the interrelation of job growth and prevailing wages. In short, low-skill, low-wage industries such as Leisure & Hospitality, for example, are growing faster than high-skill, high-wage jobs in industries such as Manufacturing and Construction.



EMPLOYMENT GROWTH (2006 – 2010) VS. AVERAGE SALARY (2010) VS. EMPLOYMENT SIZE (2010)

BURNET COUNTY



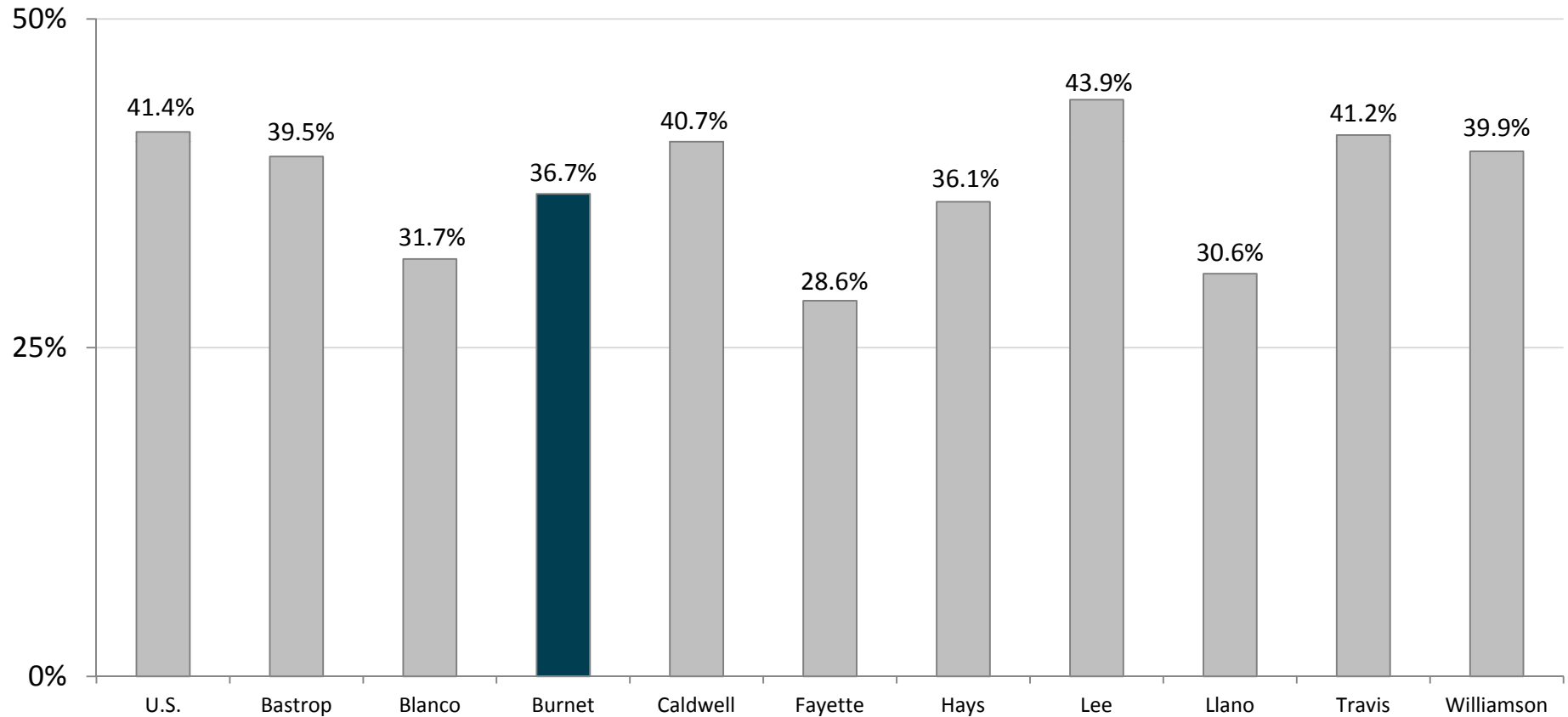
SOURCE: U.S. BUREAU OF LABOR STATISTICS

BURNET COUNTY EMPLOYMENT DYNAMICS

Burnet County has the fourth-lowest rate of employment in comparison to its overall population; in 2010, fewer than 37 percent of all residents in Burnet County were employed. This figure is approximately 10 percent lower than the national average.

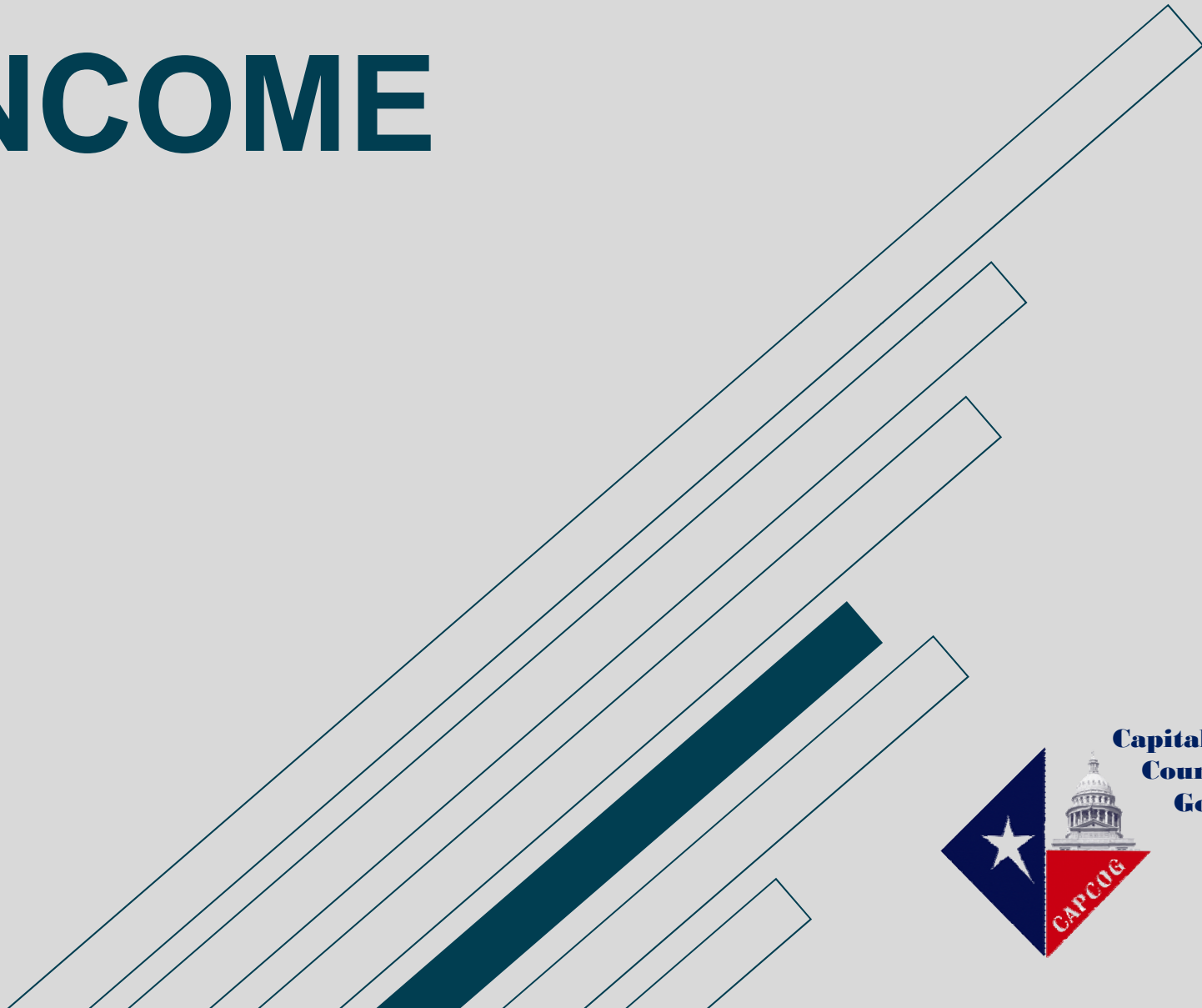


PROPORTION OF RESIDENTS EMPLOYED



SOURCE: U.S. BUREAU OF LABOR STATISTICS

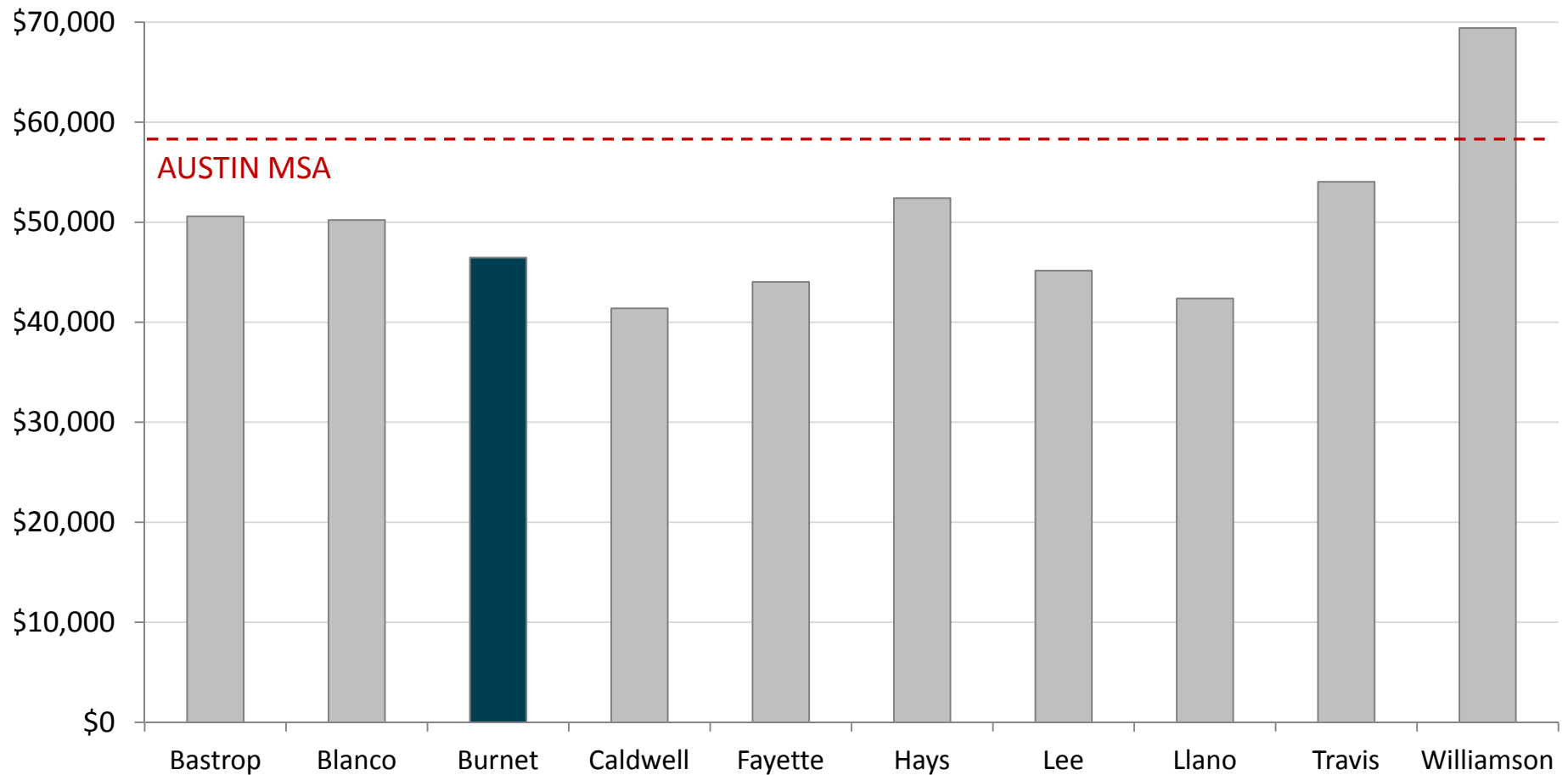
INCOME



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MEDIAN HOUSEHOLD INCOME (2005-2009)

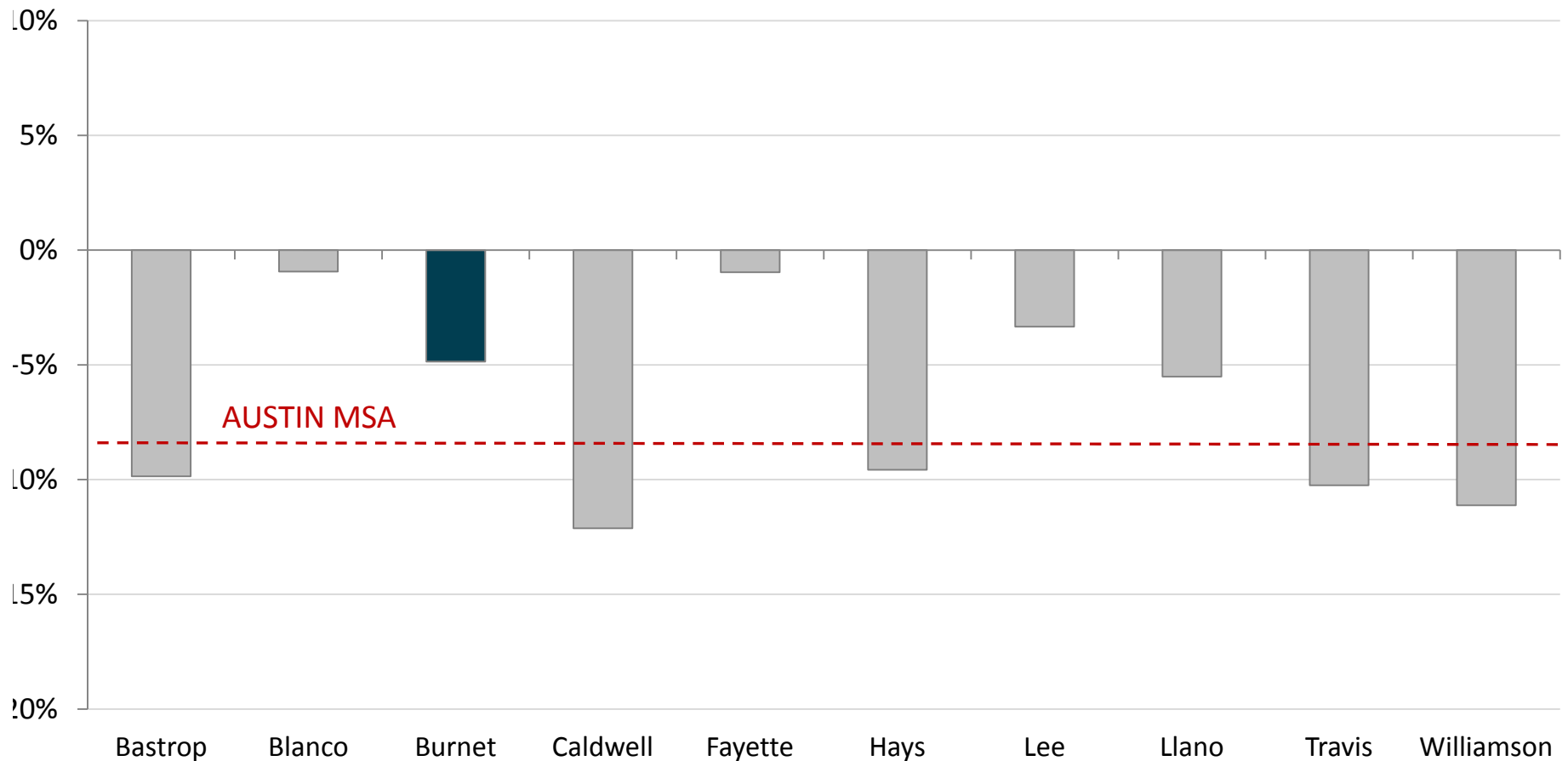
Median household income in Burnet County is approximately \$46,500, the sixth-highest figure within the CAPCOG region.



SOURCE: U.S. CENSUS BUREAU

CHANGE IN MEDIAN HOUSEHOLD INCOME (2000 vs. 2005/09)

Higher levels of growth among low-skill, low-wage industries has resulted in declining levels of household income in Burnet County and every county within the CAPCOG region. Between 2000 and 2009, median household income levels in Burnet County fell nearly 5 percent (on an inflation-adjusted basis). During the past decade, however, Burnet County has suffered less severe declines in household income than many other jurisdictions within the CAPCOG region.



AFFORDABILITY



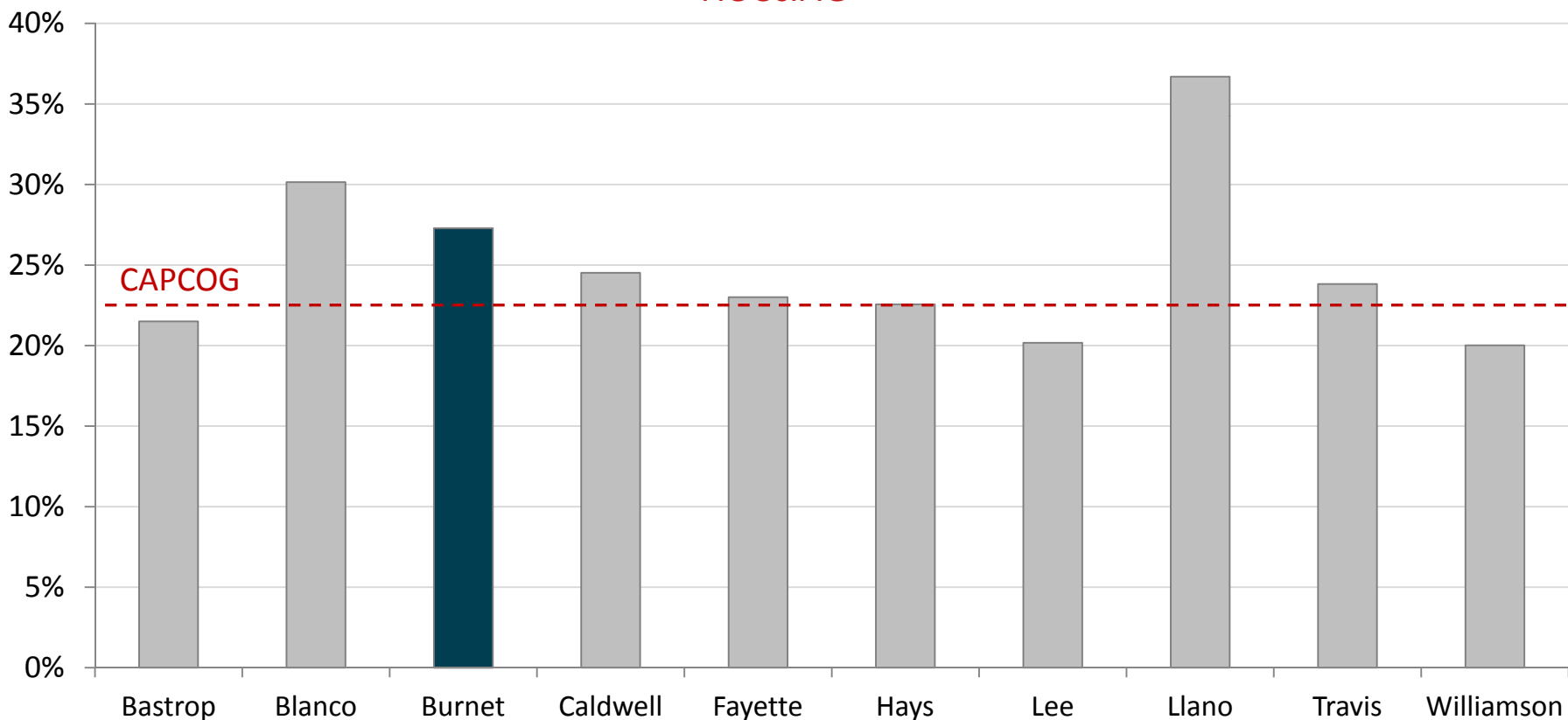
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HOUSING AFFORDABILITY (2000)

The generally accepted definition of affordability is for a household to pay no more than 30 percent of its annual income on housing. Families who pay more than 30 percent of their income for housing are considered cost burdened and may have difficulty affording necessities such as food, clothing, transportation and medical care. In 2000, 27 percent of homeowners in Burnet County with a mortgage spent more than 30 percent of their income on housing—a higher proportion than the CAPCOG average.



— PERCENTAGE OF HOMEOWNERS WITH A MORTGAGE THAT SPEND MORE THAN 30% OF INCOME ON HOUSING —



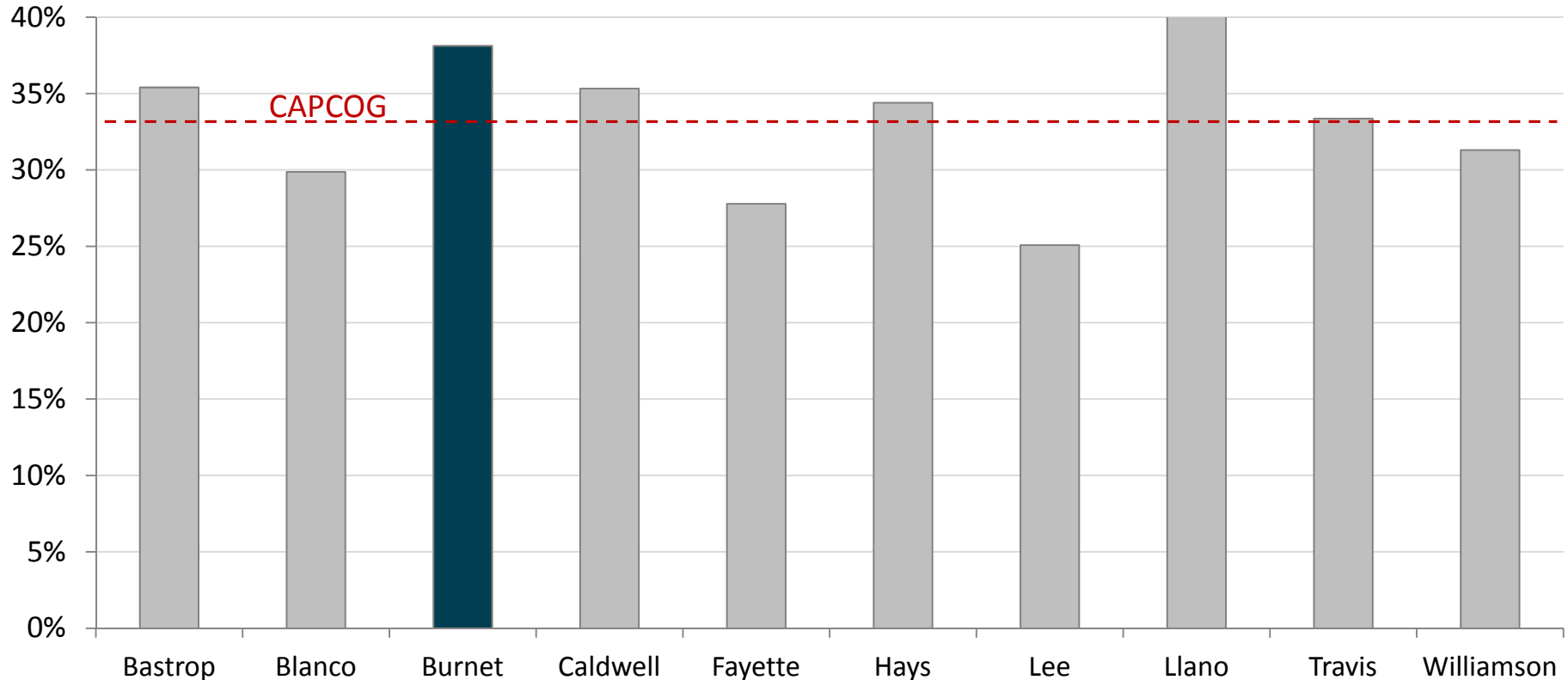
SOURCE: U.S. CENSUS BUREAU

HOUSING AFFORDABILITY (2005-2009)

In 2005/09, the percentage of homeowners in Burnet County with a mortgage that spent more than 30 percent of their income on housing jumped to 38 percent. During the past decade, housing has become less affordable in every county within the CAPCOG region. While home prices have slightly increased during this period, stagnant (and declining) levels of income are primarily responsible for the decline of housing affordability within the CAPCOG region.

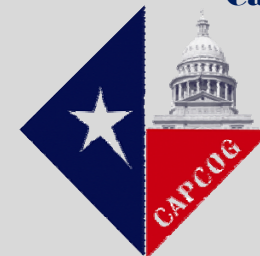
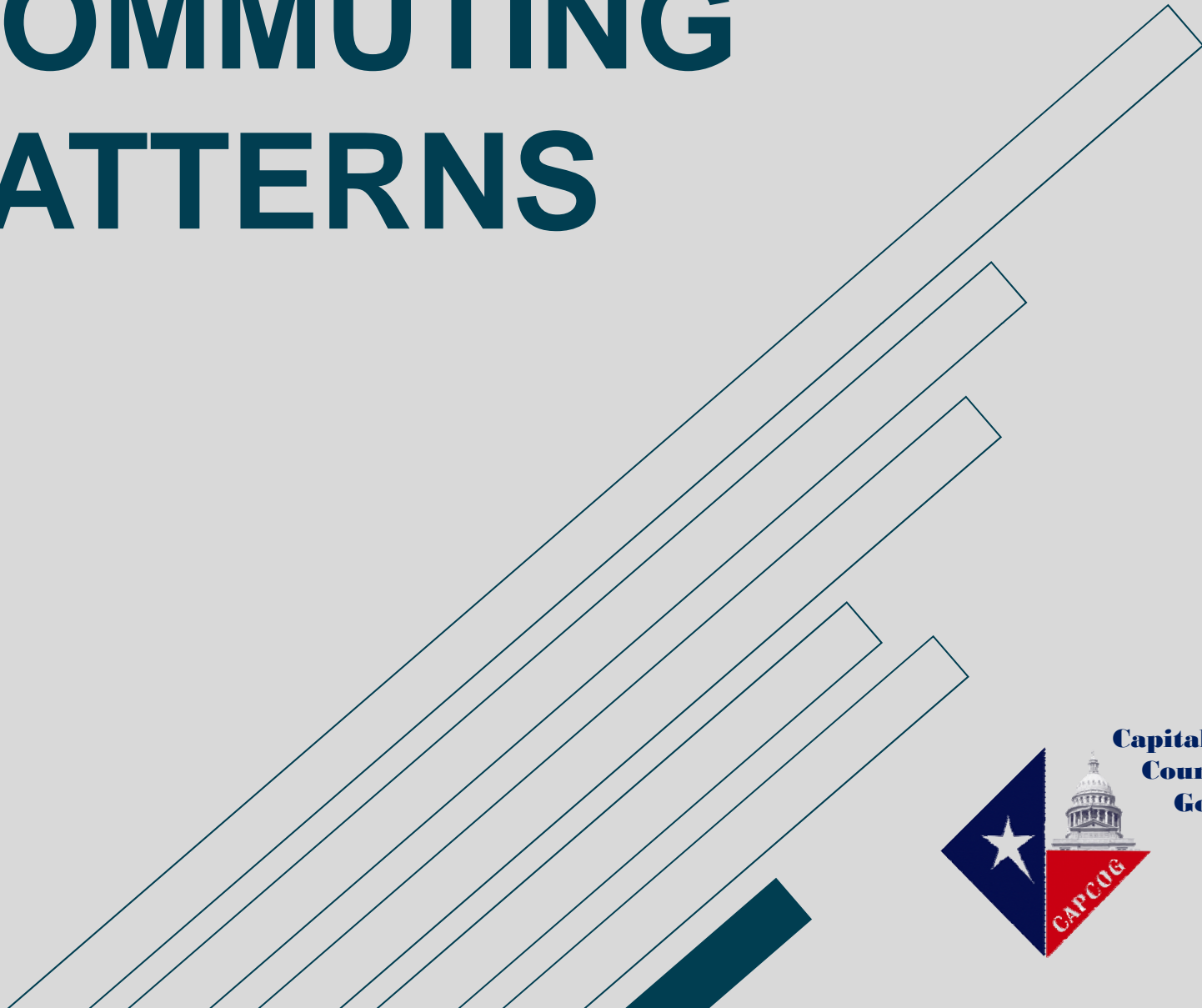


— PERCENTAGE OF HOMEOWNERS WITH A MORTGAGE THAT SPEND MORE THAN 30% OF INCOME ON HOUSING —



SOURCE: U.S. CENSUS BUREAU

COMMUTING PATTERNS



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DAILY COMMUTING PATTERN BALANCE - BURNET COUNTY

A The light red circle depicts workers living in Burnet County who commute to another county for employment.

B Workers living and working in the designated county are represented by the overlapping circles.

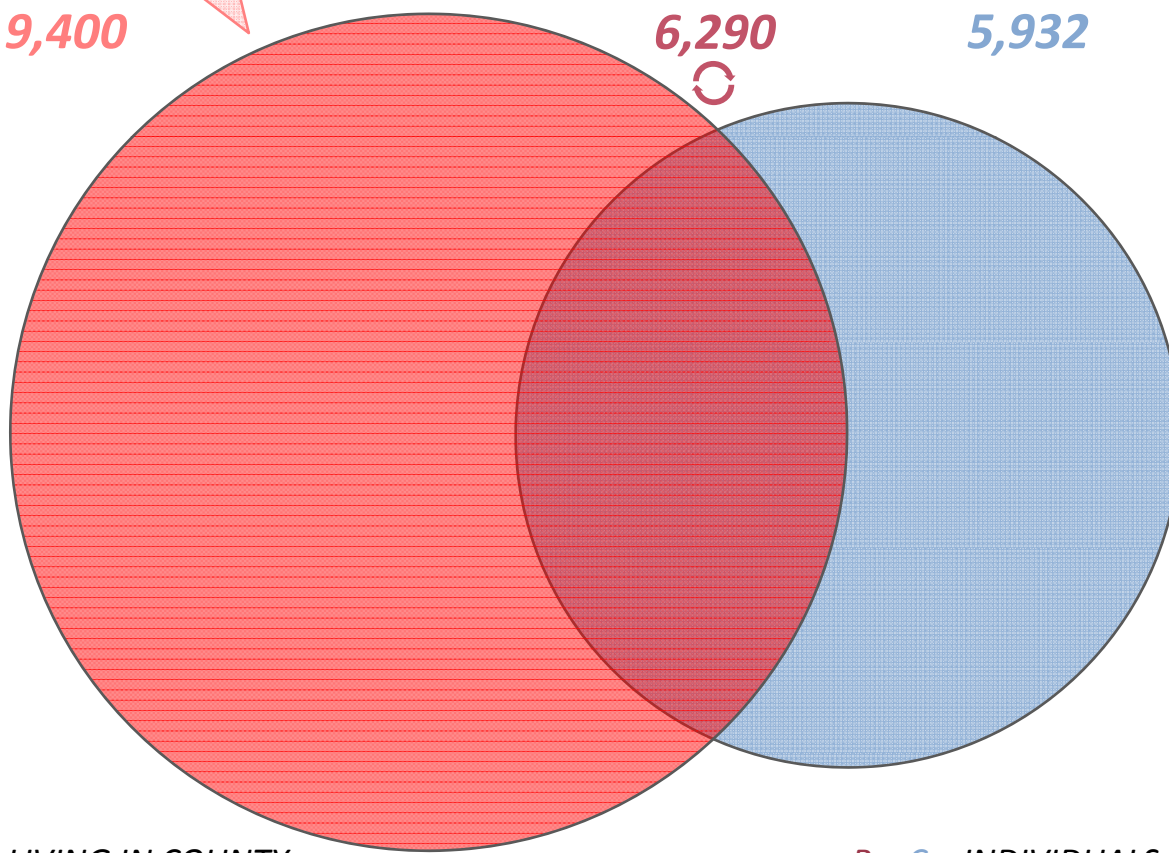
C The blue circle depicts outside workers who commute into Burnet County for work.



←
9,400

6,290
C

←
5,932



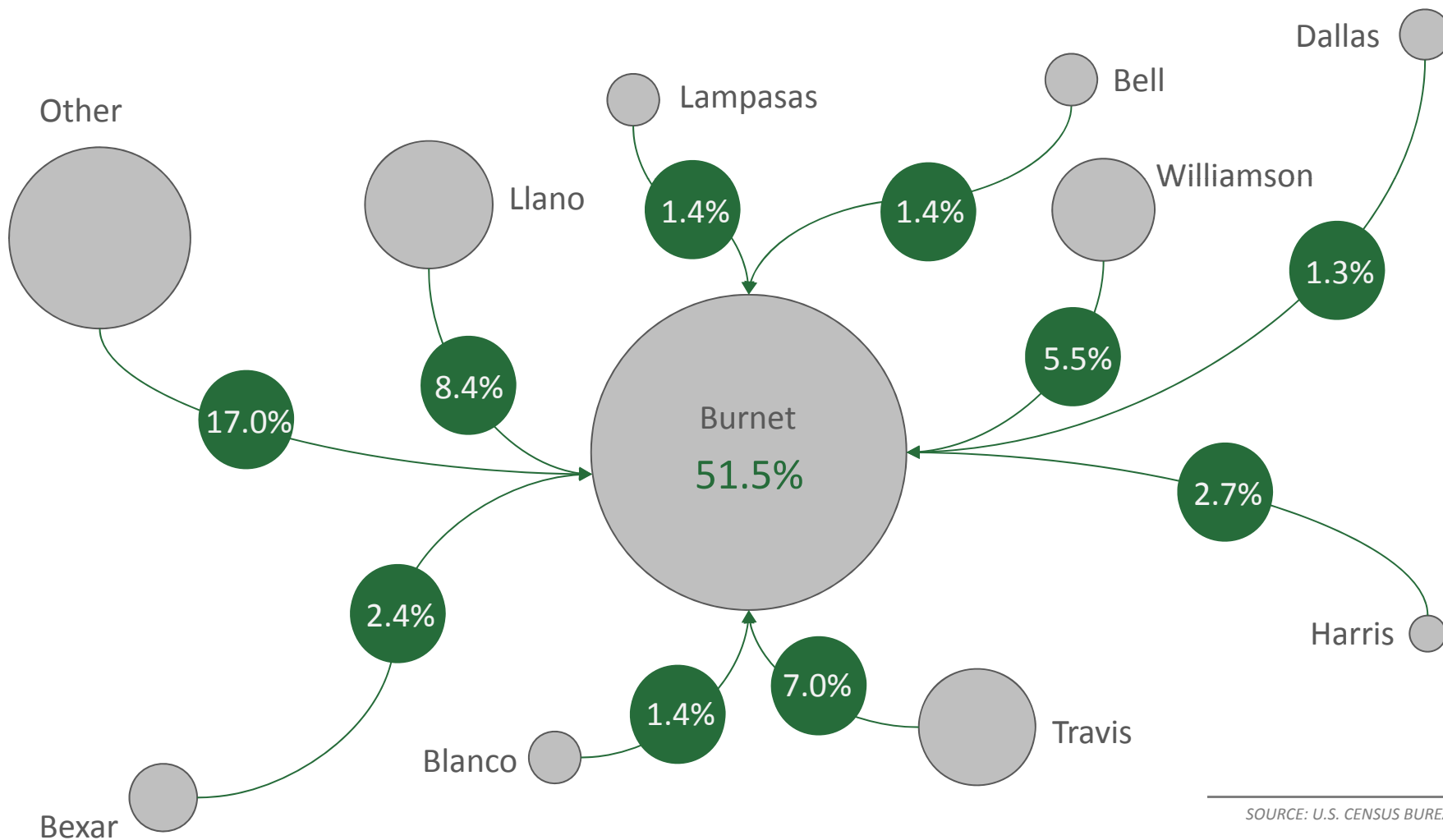
$A + B =$ WORKERS LIVING IN COUNTY

$B + C =$ INDIVIDUALS WORKING IN COUNTY

SOURCE: U.S. CENSUS BUREAU

BURNET COUNTY – WHERE WORKERS LIVE?

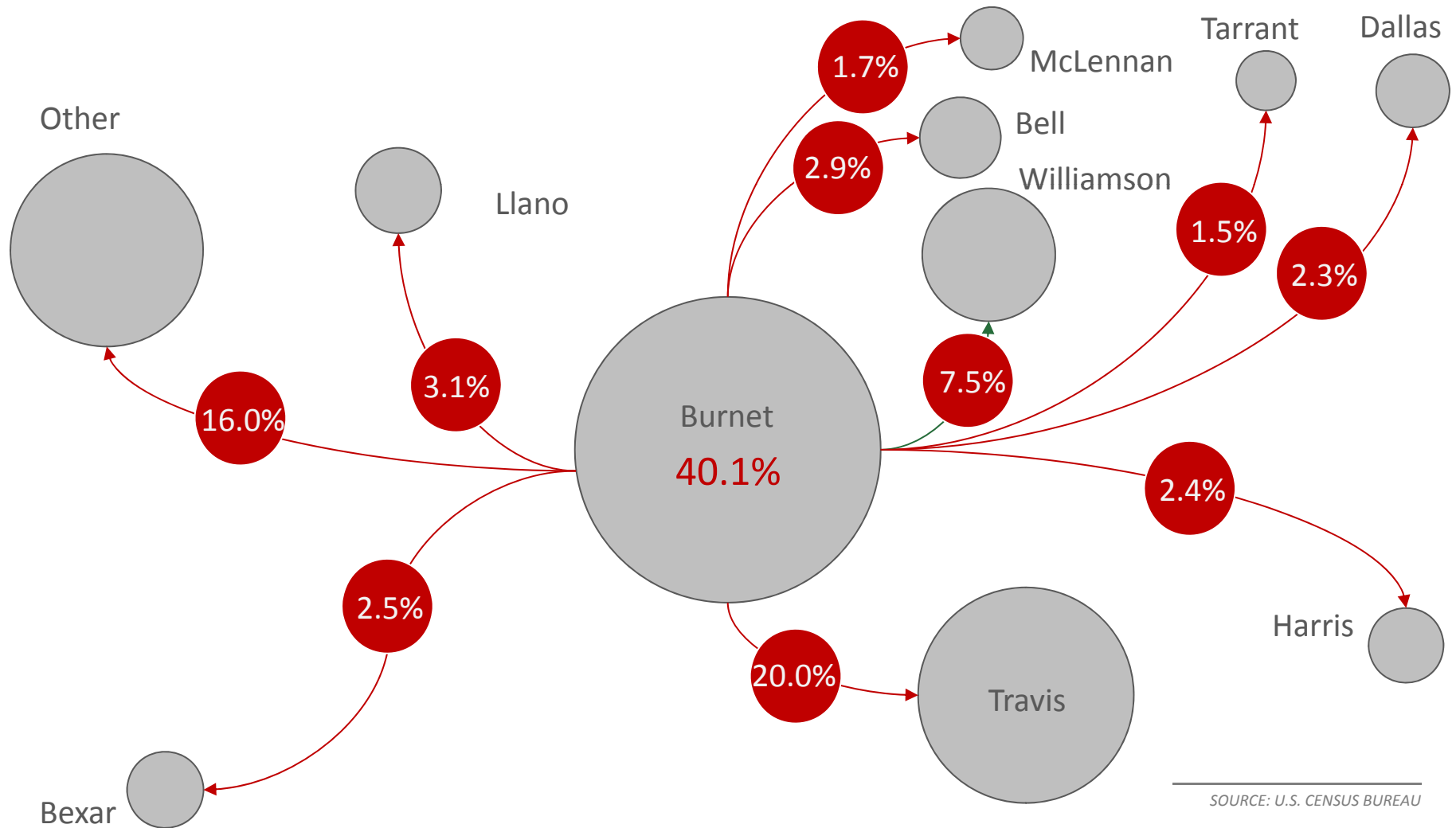
Nearly half of Burnet County residents commute to jobs outside of the county. Llano County is the largest recipient of Burnet County workers. Travis and Williamson Counties are also leading recipients of Burnet County workers.



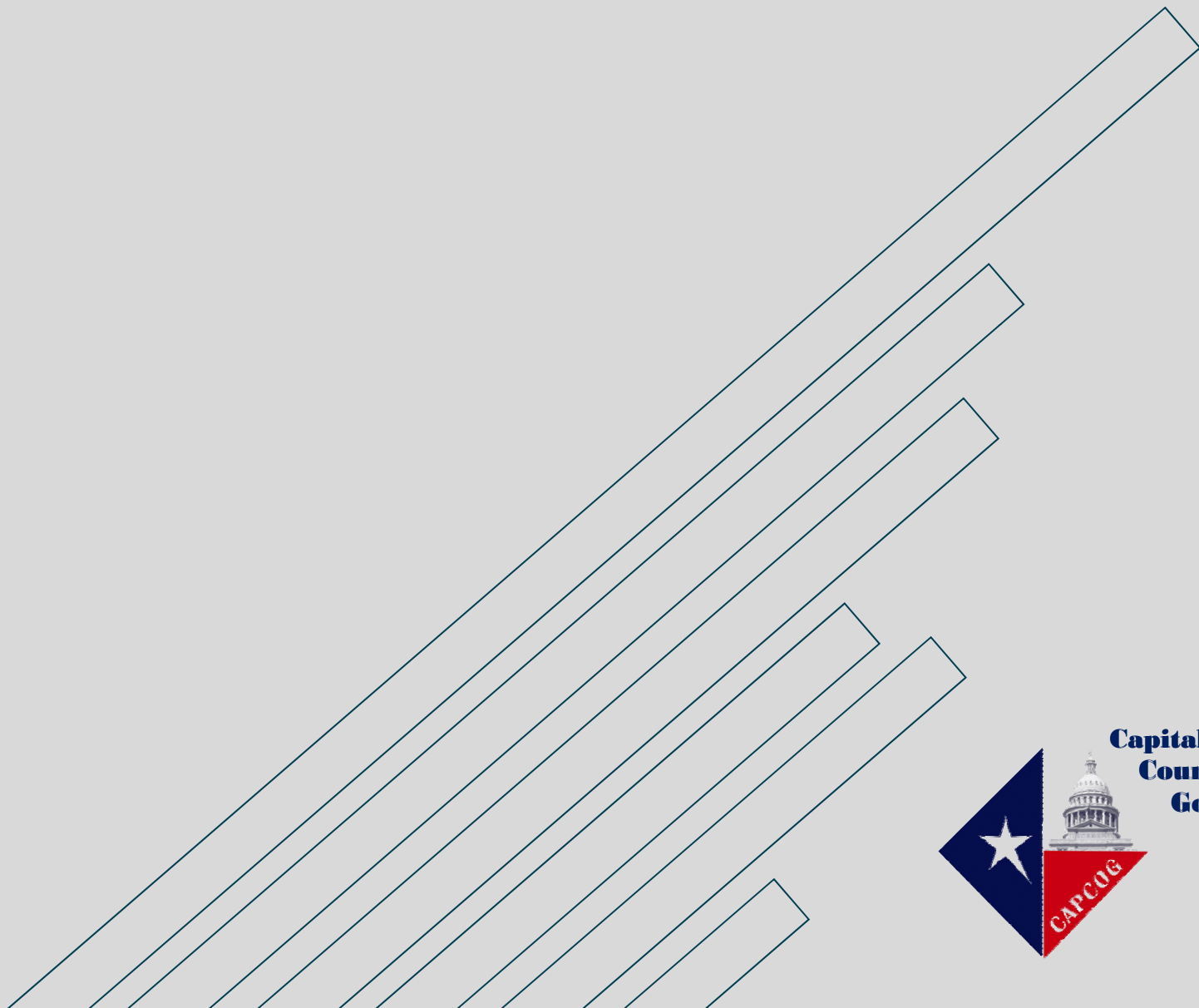
SOURCE: U.S. CENSUS BUREAU

BURNET COUNTY – WHERE RESIDENTS WORK?

Just as many residents of Burnet County work in other jurisdictions, many outside residents are employed within Burnet County. Every day, more than half of all individuals working in Burnet County commute from another county. The top ten origins of worker in Burnet County residents are listed below. Travis County is the largest external source Burnet County workers; nearly 20 percent of workers in Burnet County live in Travis County.



SOURCE: U.S. CENSUS BUREAU



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