

LLANO STATE OF THE COUNTY 2012

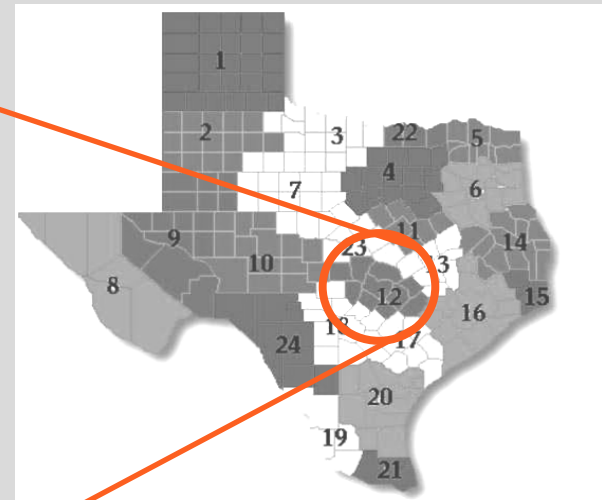
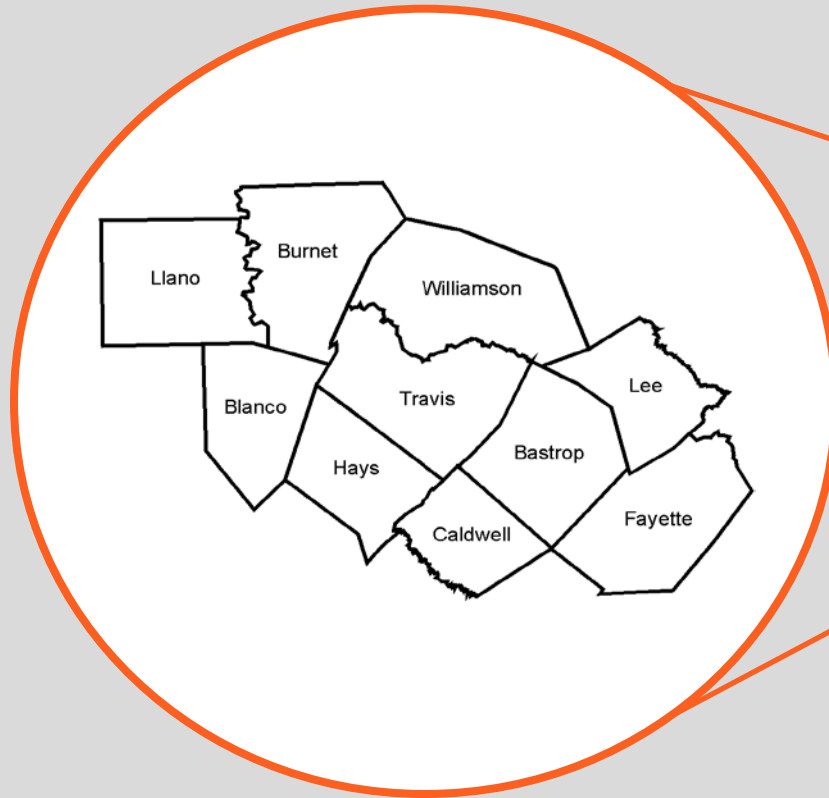


Regional Planning Commission in Statute; more often called a Cog. CAPCOG includes the following divisions:

- Emergency Communications 9-1-1
- Area Agency on Aging
- Homeland Security Planning & Training
- Regional Law Enforcement Academy
- Air Quality Planning
- Economic Development Analysis & Tech Assist
- Solid Waste Planning

THE CAPITAL AREA COUNCIL OF GOVERNMENTS

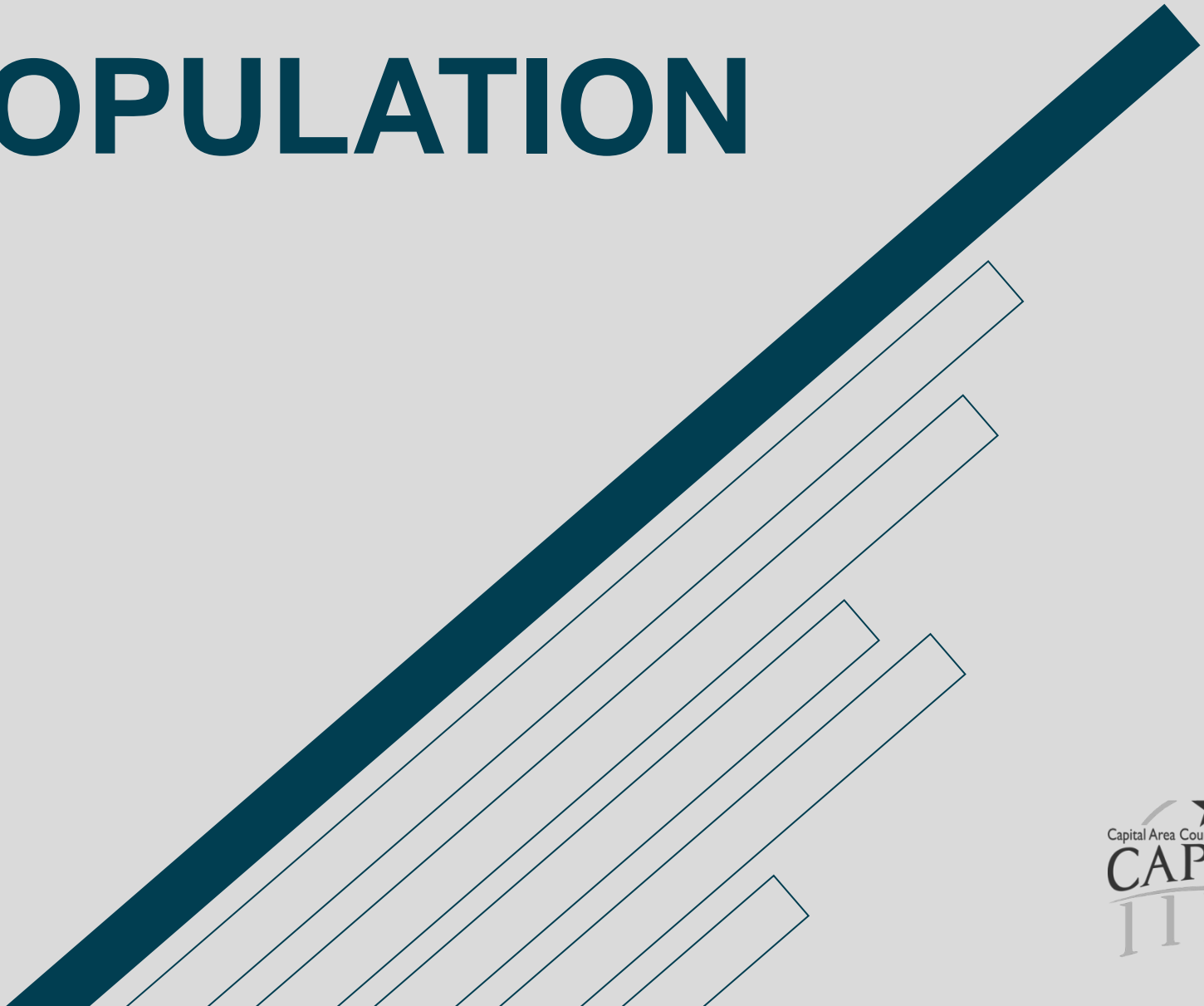
Ten-County service area (State of Texas planning region 12)



EXECUTIVE COMMITTEE

Chairman	Judge Tom Bonn	Representative Larry Gonzales	Commissioner Karen Huber	Council Member Kim Porterfield
Judge Donna Klaeger	Caldwell County	Texas House	Travis County	City of San Marcos
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1 st Vice Chairman	City of Lockhart	City of Buda	Fayette County	City of Marble Falls
Mayor Alan McGraw	Judge Bert Cobb	Judge Dan A. Gattis	Commissioner Cynthia Long	Council Member Kathie Tovo
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2 nd Vice Chairman	Mayor Jeff Coleman	Representative Larry Gonzales	Judge Ronnie McDonald	Representative Paul Workman
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Llano County	Commissioner Sarah Eckhardt	Judge Bill Guthrie	Council Member Scott Mitchell	
Secretary	Travis County	Blanco County	City of Cedar Park	
Mayor Marc Holm	Council Member Ron Fletcher	Mayor Bill Hamilton	Council Member Brad Pickett	
City of Elgin	City of Buda	City of Rollingwood	City of Kyle	
Immediate Past Chair	Judge Dan A. Gattis	Mayor Marc Holm	Commissioner Maurice Pitts	
Commissioner Will Conley	Williamson County	City of Elgin	Lee County	

POPULATION

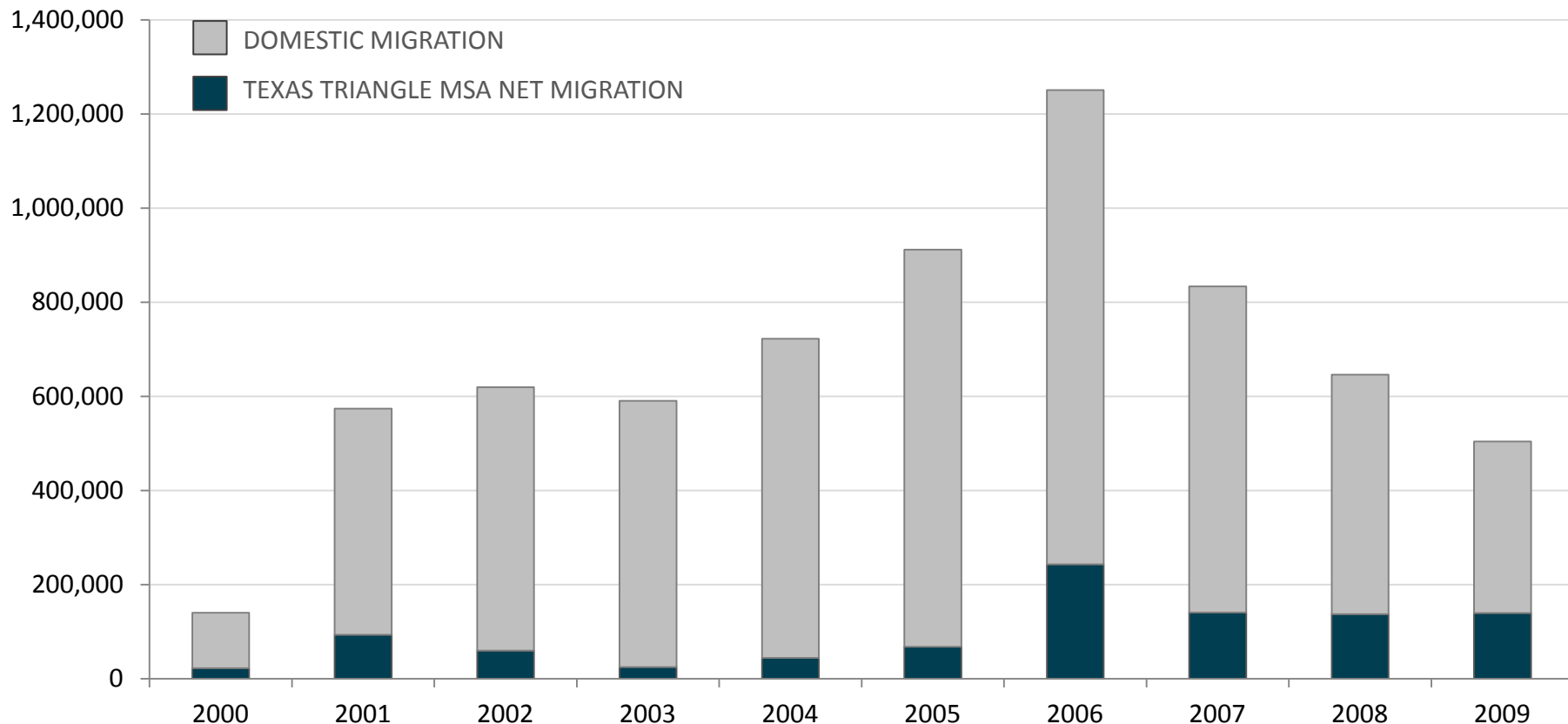


POPULATION – THE RISE OF TEXAS

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)



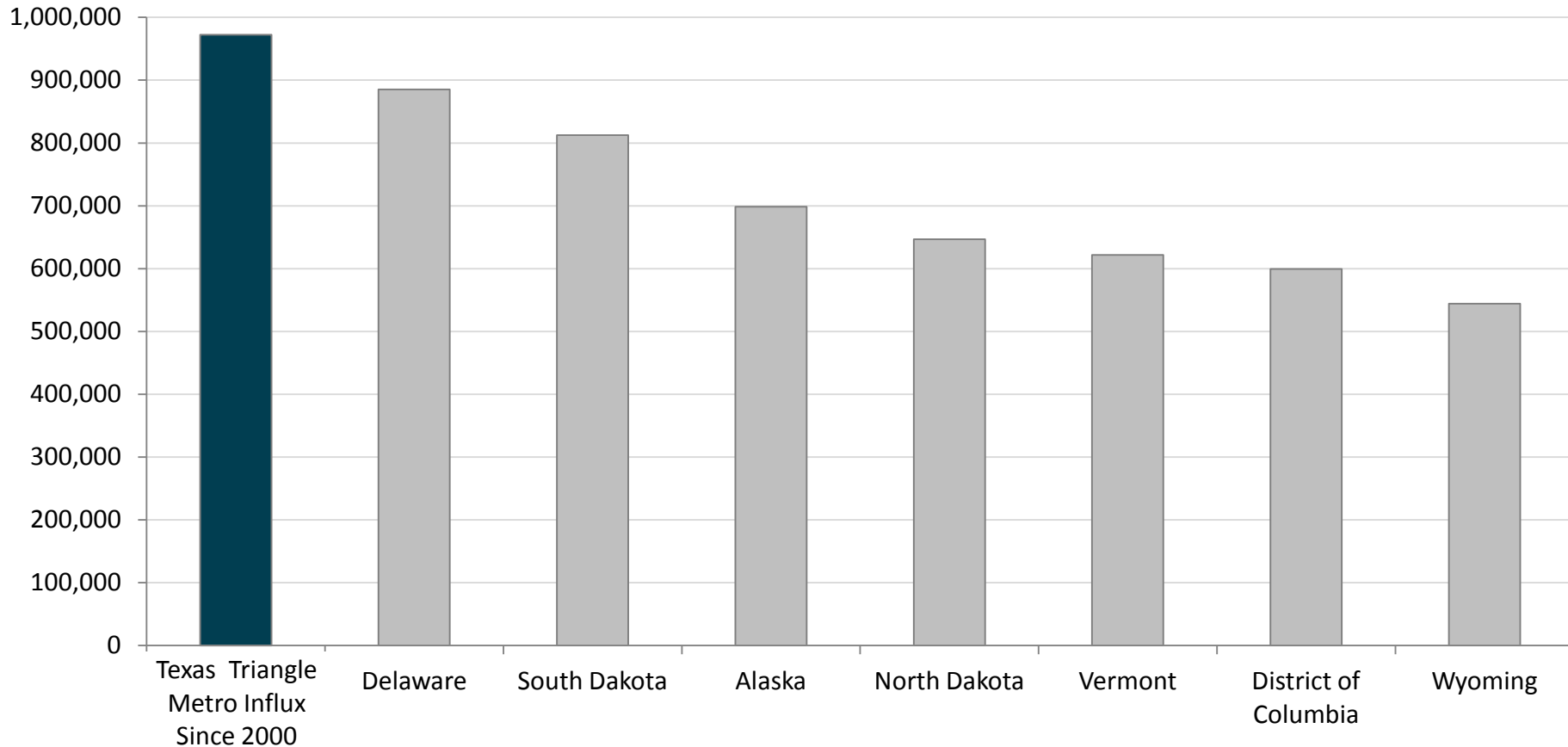
SOURCE: U.S. CENSUS BUREAU

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



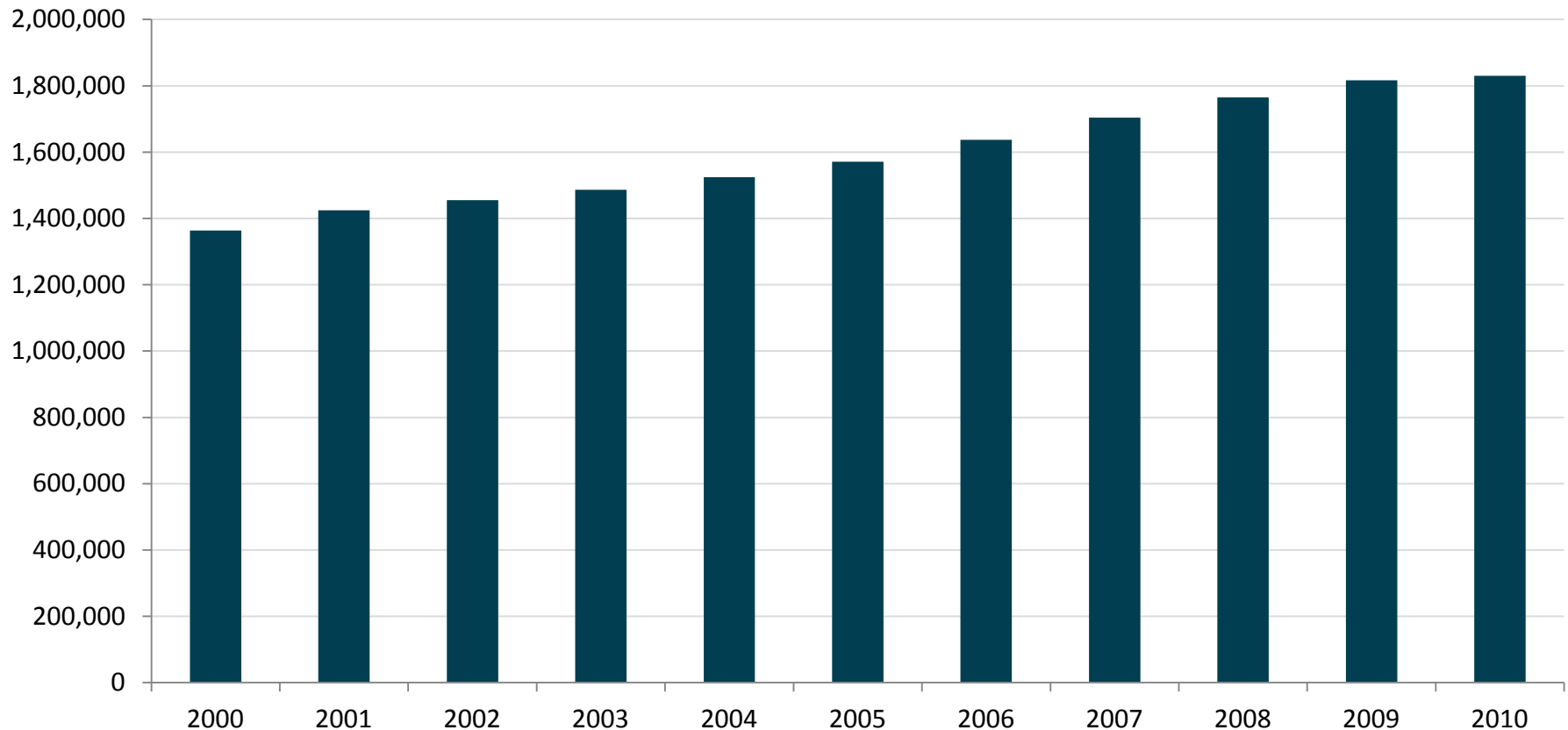
SOURCE: U.S. CENSUS BUREAU

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

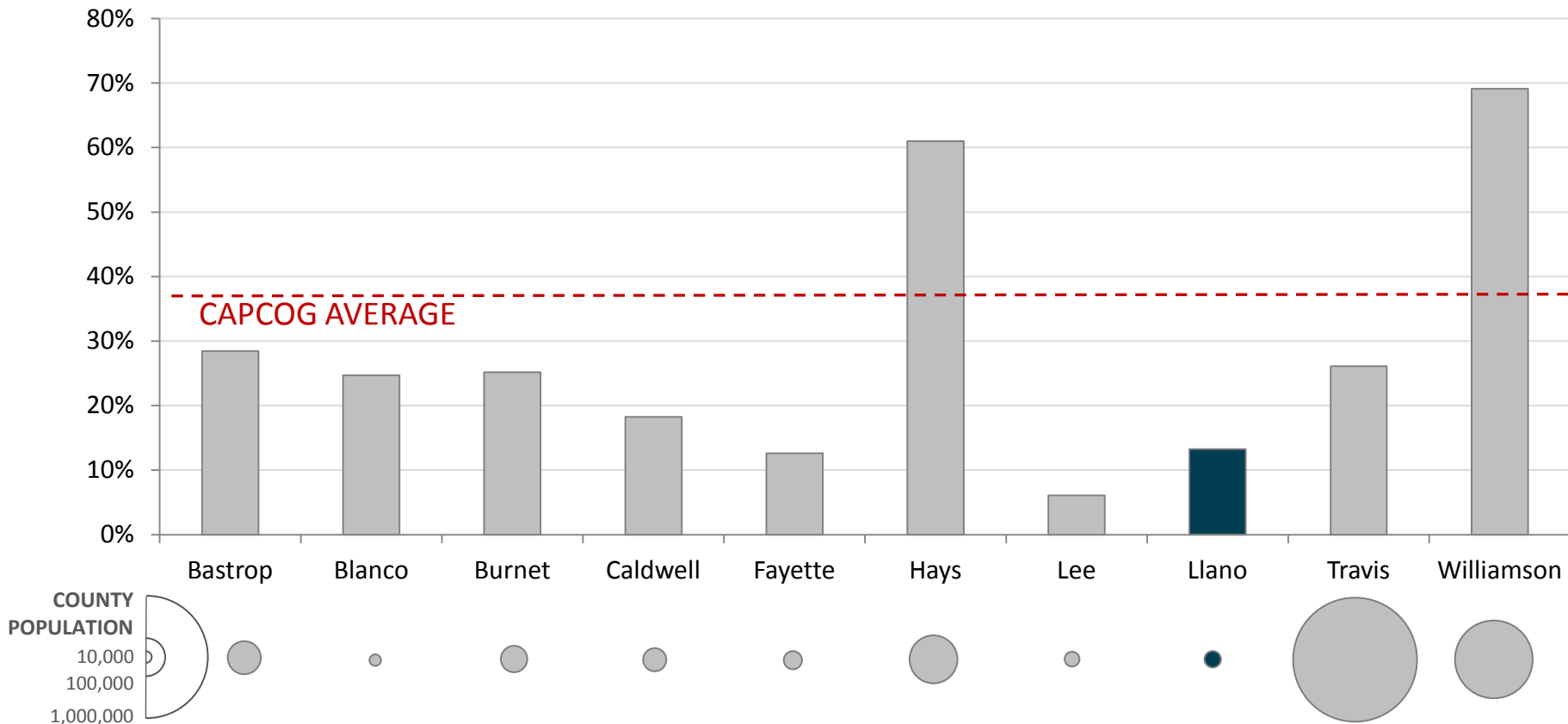


POPULATION – CAPCOG REGION GROWTH

Within the CAPCOG region, Llano County experienced the third-slowest rate of growth during the past decade. Since 2000, the population of Llano County has increased by approximately 13 percent; Llano County is currently home to more than 19,000 residents. During this period, only Lee and Fayette counties experienced lower levels of growth. The population of Travis County, the traditional engine of growth within the region, increased by 26 percent during the past decade.



POULATION GROWTH OF 10-COUNTY CAPCOG REGION (2000 – 2010)



POPULATION - COMPONENTS OF POPULATION CHANGE

Llano County's growth during the past decade has been wholly dependent on in-migration. Since 2000, deaths of existing residents have outpaced births within Llano County. In the absence of any natural increase, Llano County's population growth has been sustained by individuals moving to Llano from other jurisdictions.



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

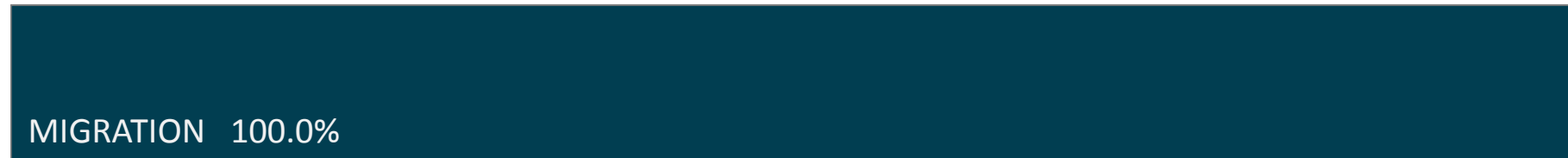
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CAPCOG



LLANO COUNTY

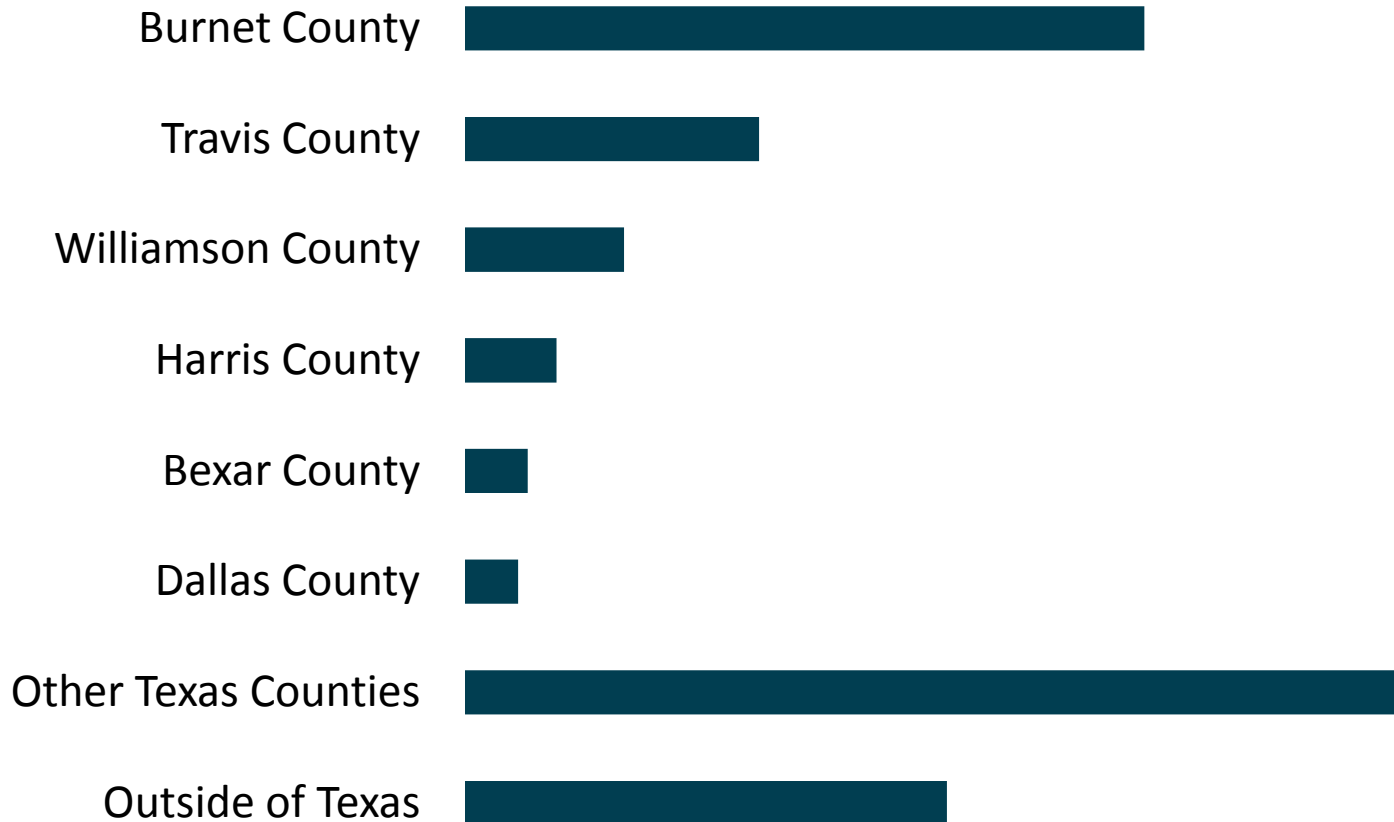


POPULATION – LLANO COUNTY IN-MIGRATION PATTERNS

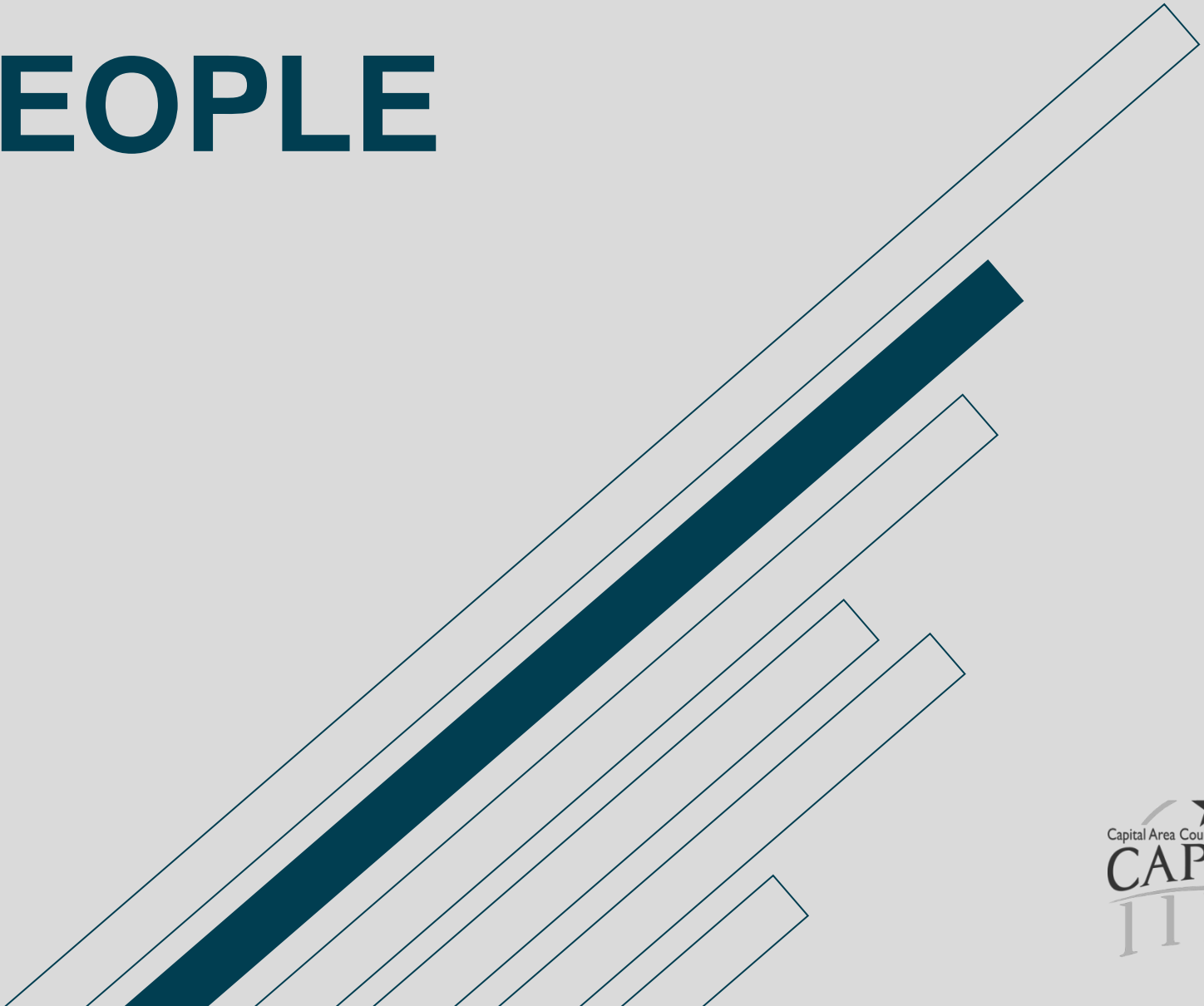
The largest sources of migration into Llano County remains former residents of the Austin metropolitan region, particularly Travis and Williamson Counties. Llano County also receives transplants from the other major metropolitan areas in Texas, including Dallas (Dallas County), Houston (Harris County), and San Antonio (Bexar County).



ORIGIN OF IN-MIGRANTS – LLANO COUNTY (2009-2010)

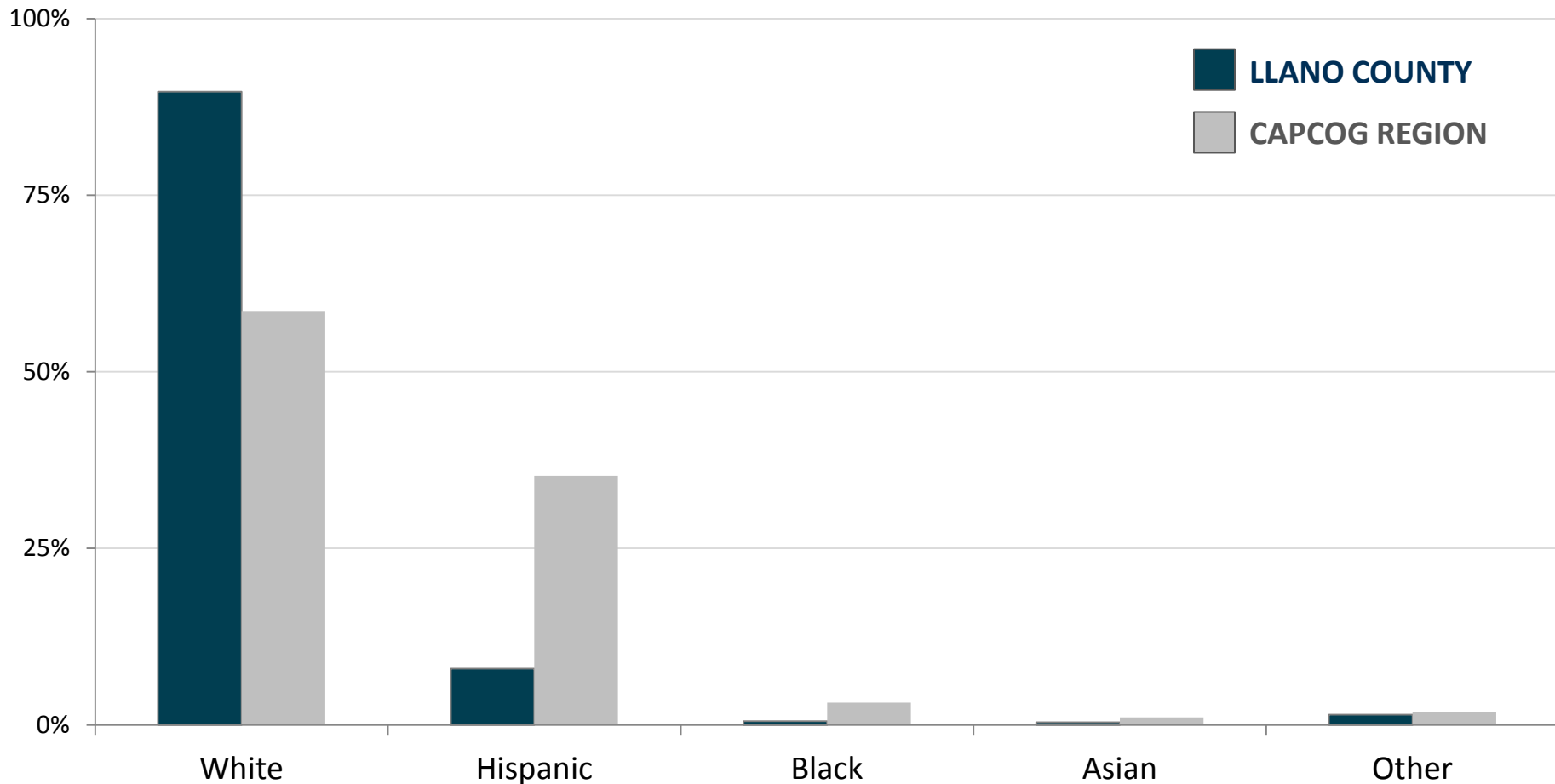


PEOPLE



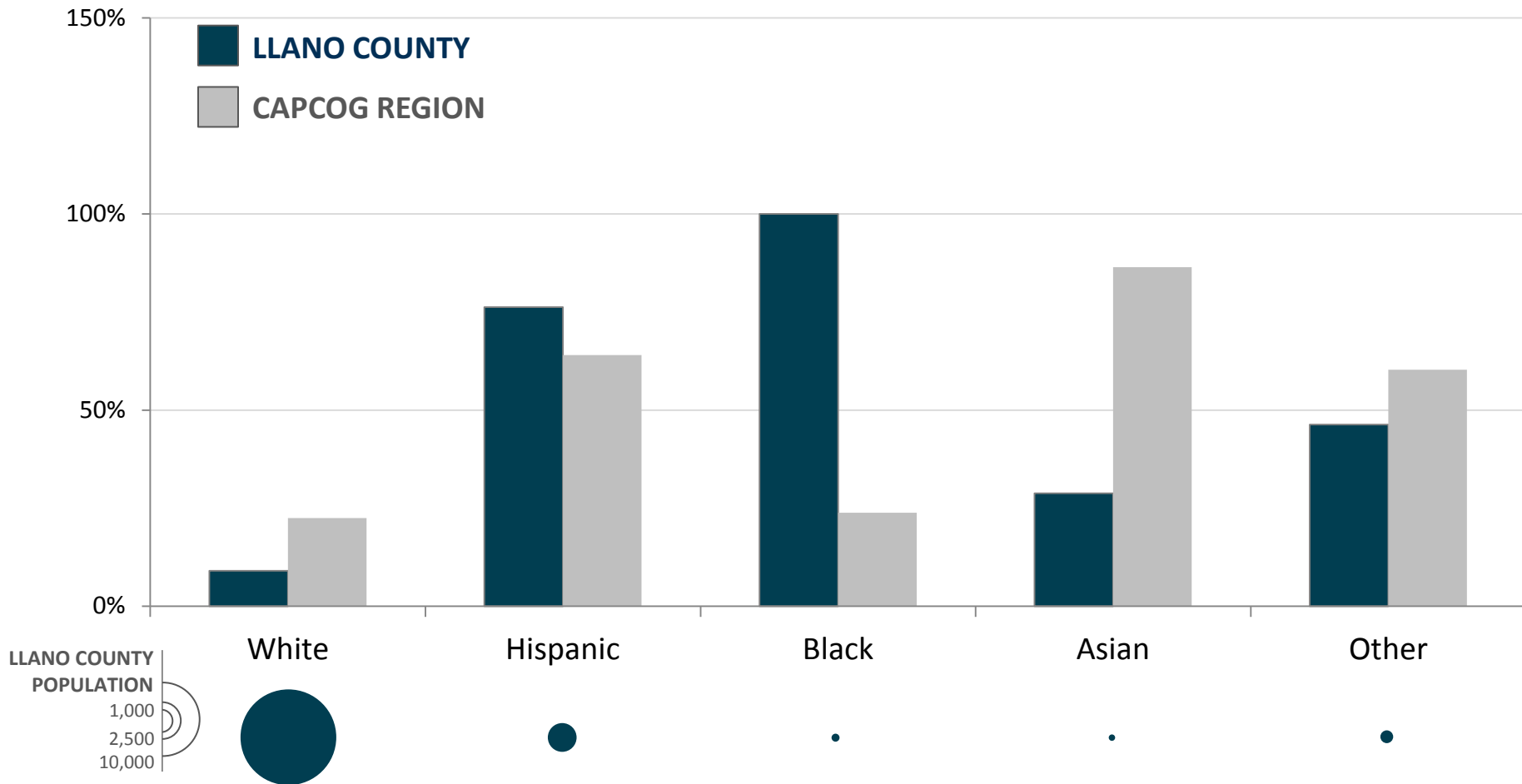
PEOPLE - RACIAL & ETHNIC COMPOSITION - 2010

The racial and ethnic composition of Llano County differs slightly from the regional average. The proportion of White residents in Llano County, for example, is approximately 13 percentage points higher than the CAPCOG regional average. In contrast, Hispanic residents represent a significantly smaller share of Llano County's population than the regional average. Llano County also features a lower proportion of other minority groups than the overall region.



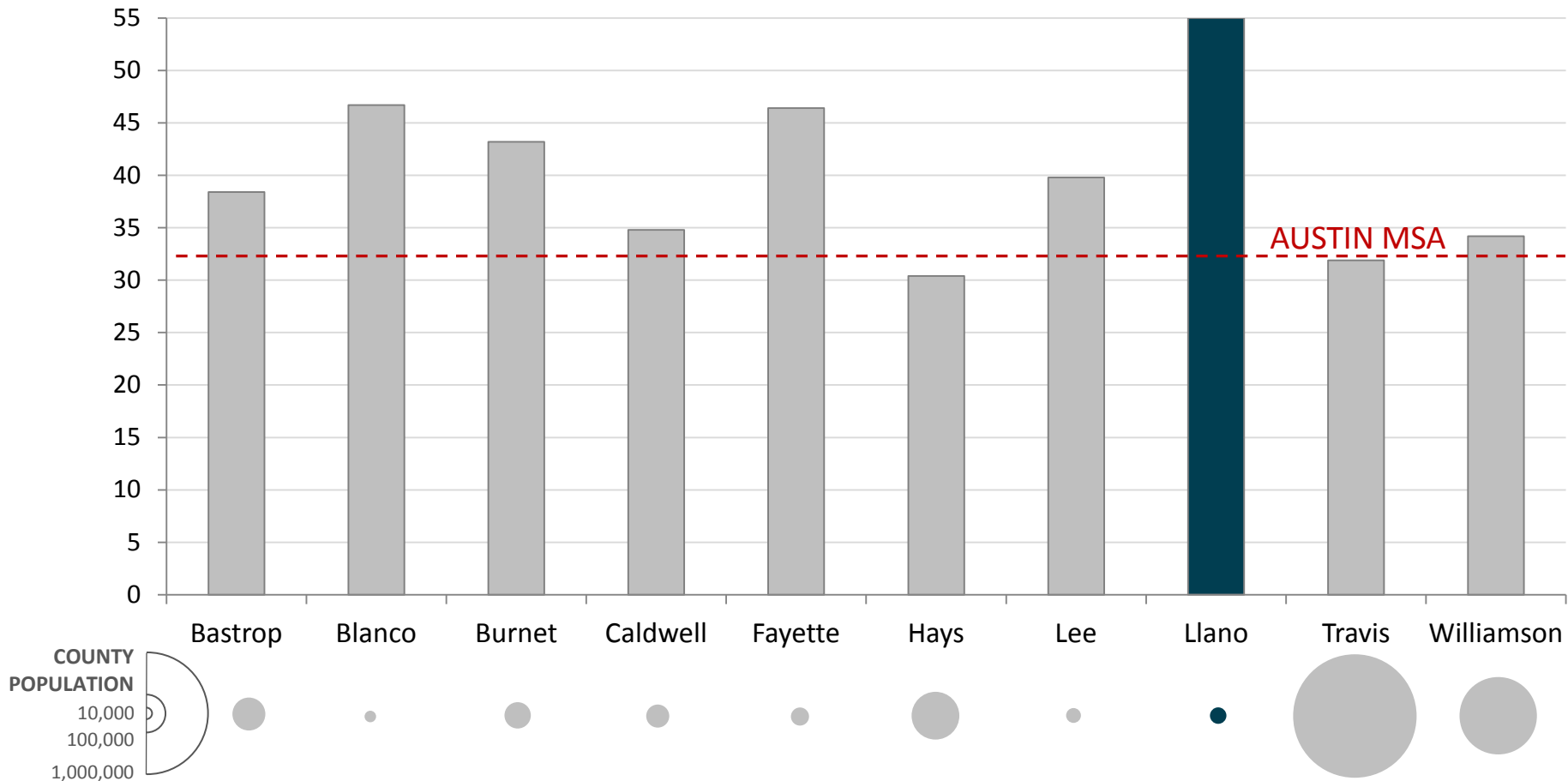
PEOPLE - GROWTH BY RACIAL & ETHNIC GROUP (2000 – 2010)

Every racial and ethnic group within Llano County is experiencing growth. Black residents are the fastest-growing racial/ethnic group within Llano County. Since 2000, this population has increased more than 100 percent (although the absolute increase was fewer than 50 individuals). Hispanic residents are the second-fastest growing single racial/ethnic group in Llano County. During the past decade, this population has increased more than 75 percent. The Asian population increased by more than 28 percent in Llano County.



PEOPLE – MEDIAN AGE (2010)

Llano County is significantly older than the rest of the CAPCOG region. Currently, the median age in Llano County is 55—approximately 8 years older than the national figure and nearly 10 years higher than Blanco County (which is the second oldest county in the CAPCOG region). Llano County's median age is approximately 20 years higher than the figure for the Austin metropolitan region.

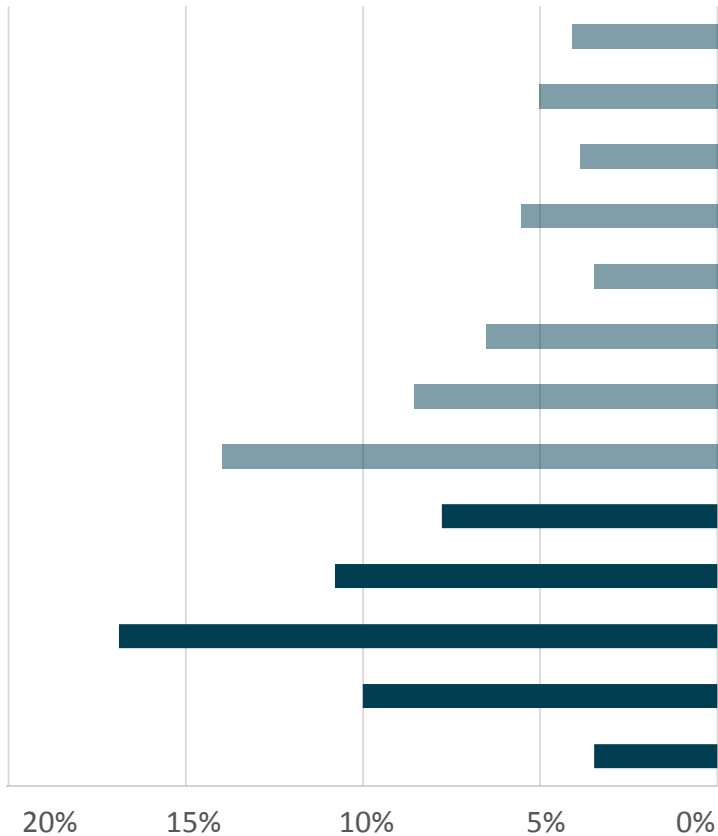


PEOPLE – AGE DISTRIBUTION (2010)

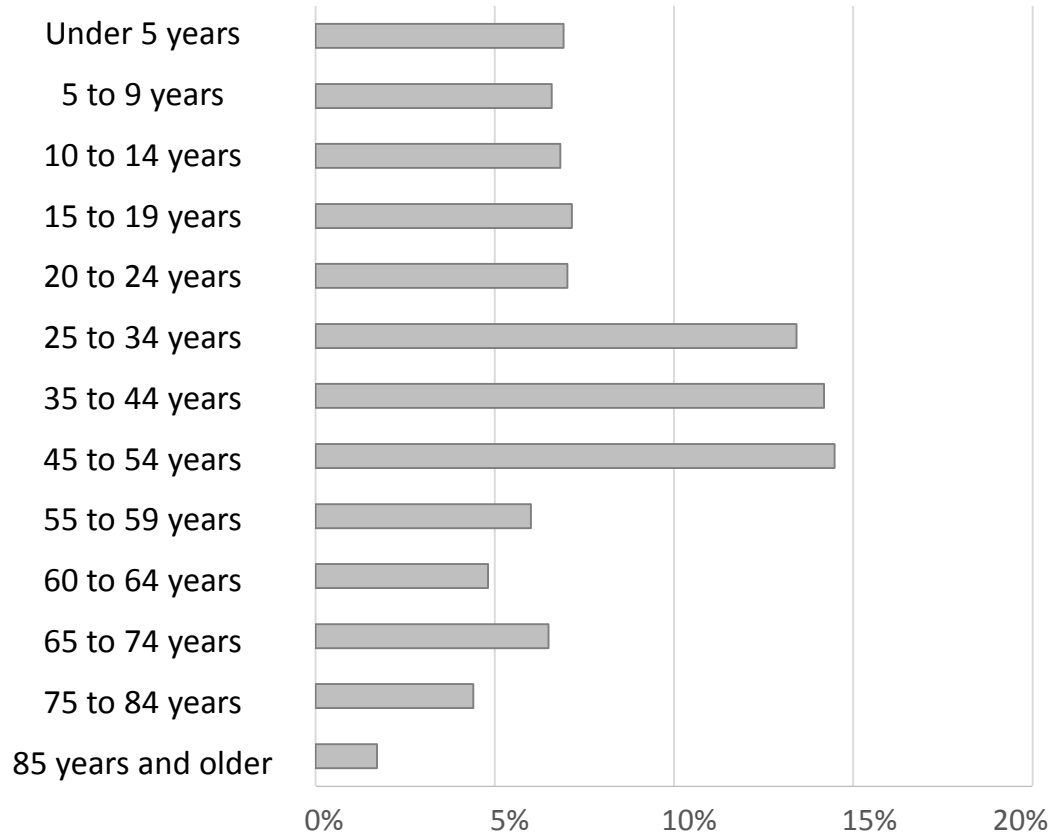
The relative maturity of Llano County is further reflected in the age distribution of the County. For example, barely half (51 percent) of Llano County residents are under the age of 55. Nationally, this figure is 76 percent. Nearly one in three Llano County residents is age 65 and older; nationally, the figure is one in eight. Llano County will continue to grow older in the years ahead, as the second largest age cohort includes individuals between the ages of 45 and 54.



LLANO COUNTY

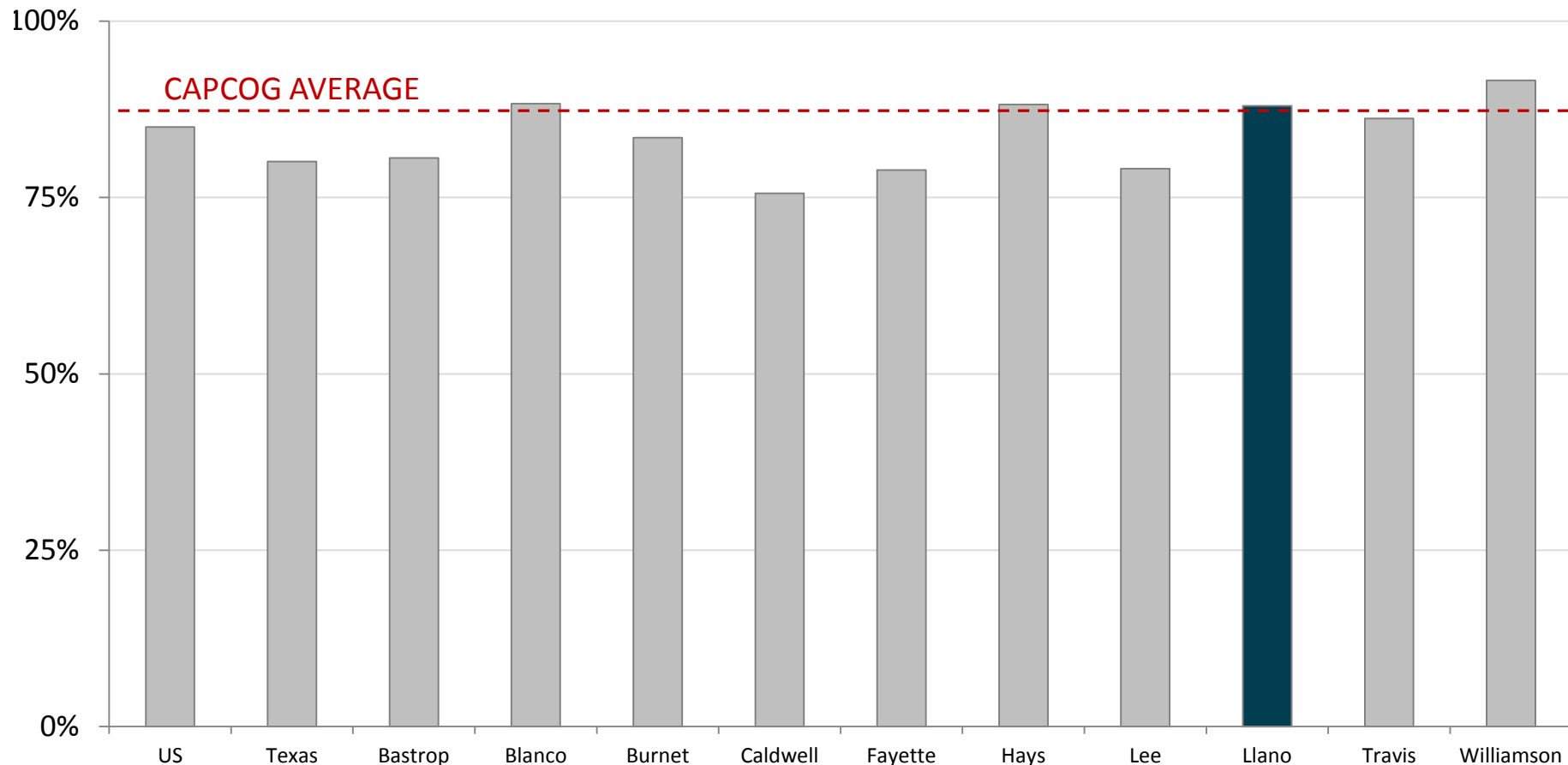


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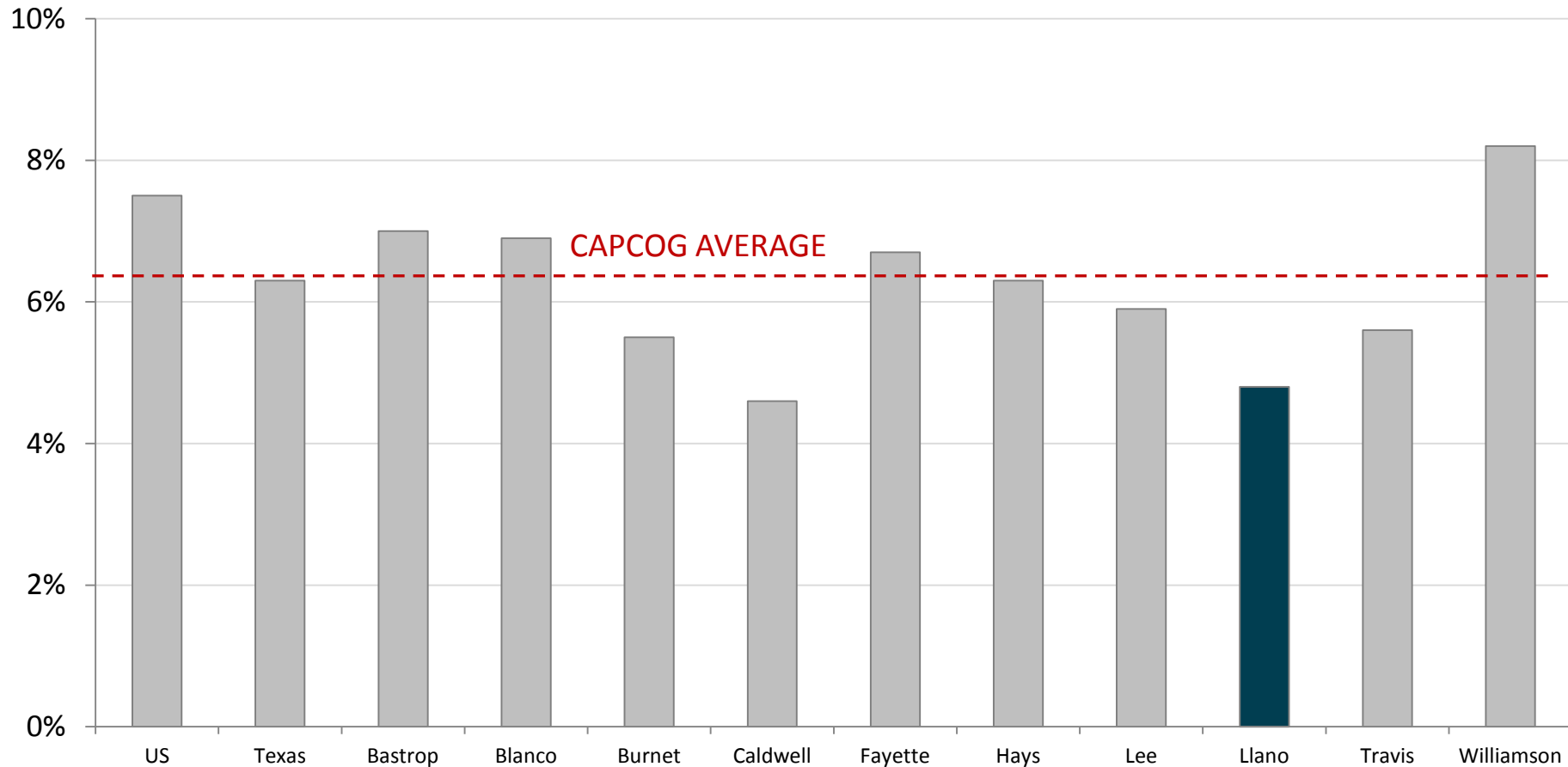
PEOPLE – H.S. EDUCATIONAL ATTAINMENT (2010)

Approximately 88 percent of all residents 25 years and older within Llano County possess a high school (or equivalent) degree. Within the CAPCOG region, Llano County has the fourth highest level of high school educational attainment. The proportion of residents with a high school degree in Llano County is higher than the national average and nearly identical to the average of the Austin metropolitan region.



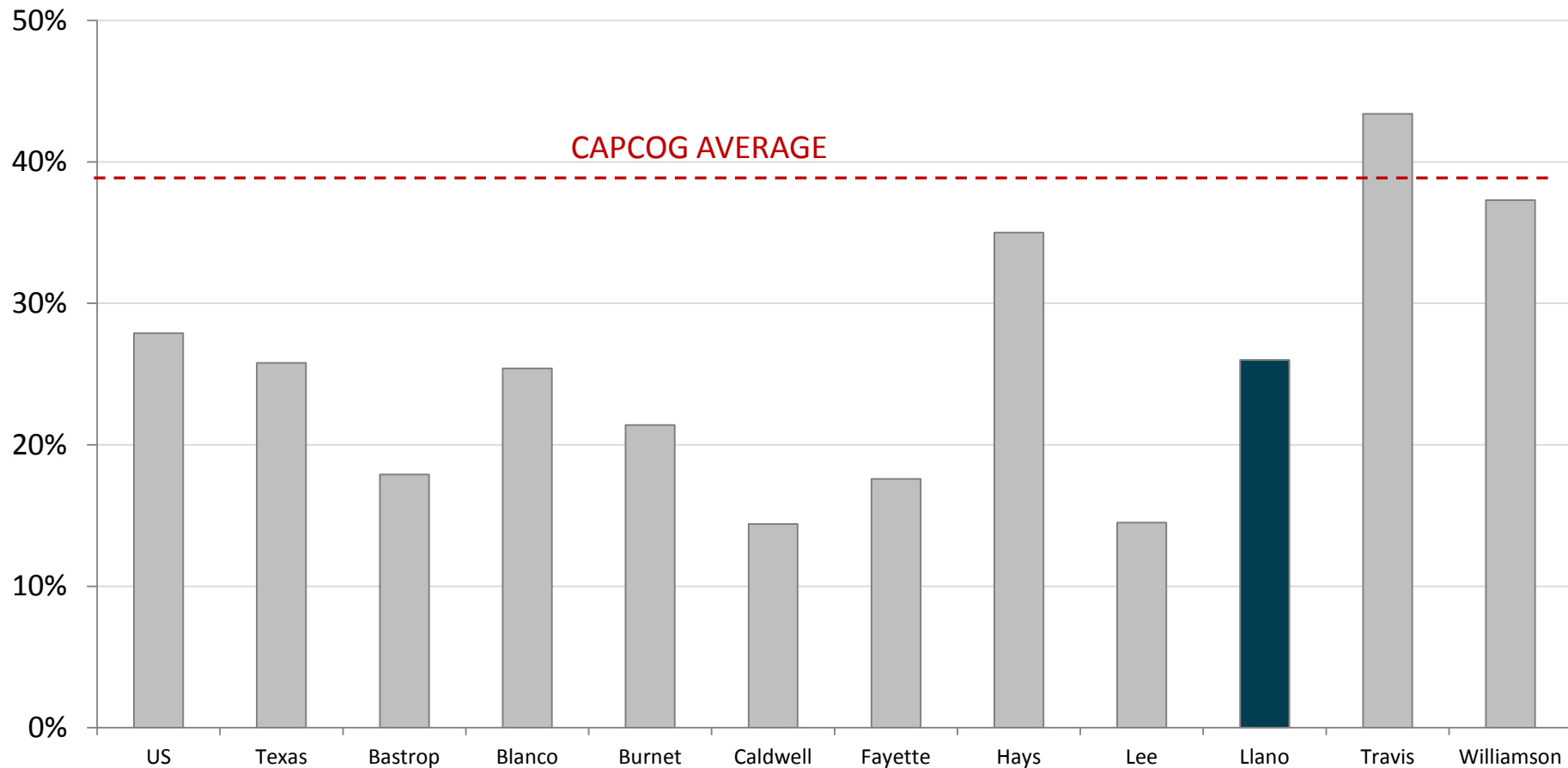
PEOPLE – ASSOCIATE’S EDUCATIONAL ATTAINMENT (2010)

Compared to the regional average, a slightly lower percentage of Llano County residents age 25 and older possess an Associate’s degree. In 2010, nearly 5 percent of Llano County residents possessed an Associate’s degree. Within the Austin metropolitan region, this figure is approximately 6 percent; nationally, more than 7 percent of individuals age 25 and older possess an Associate’s degree.

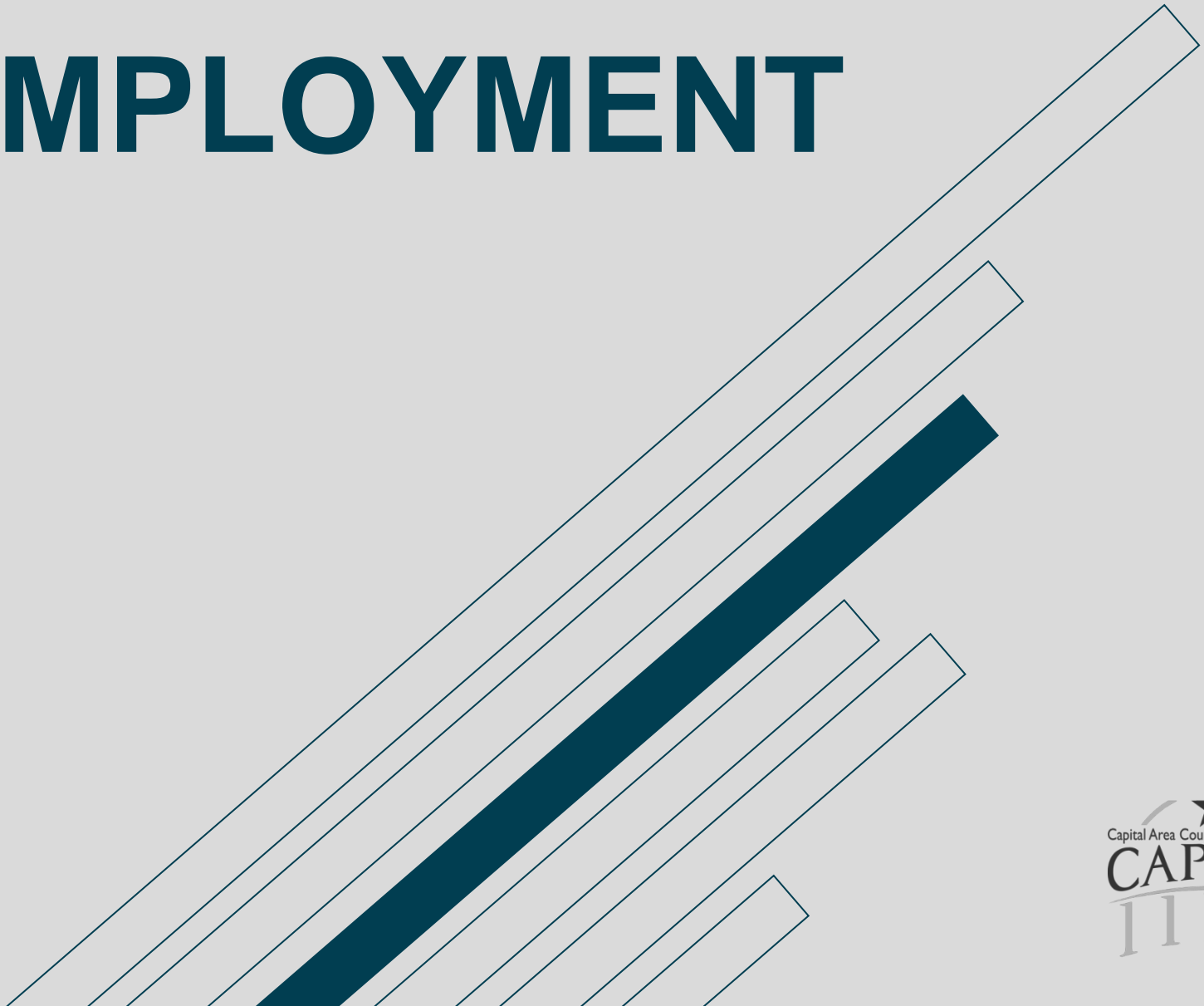


PEOPLE – COLLEGE EDUCATIONAL ATTAINMENT (2010)

Approximately 26 percent of Llano County residents over the age of 25 possess a 4-year college education, the fourth-highest level of college educational attainment within the CAPCOG region and similar to the national average.

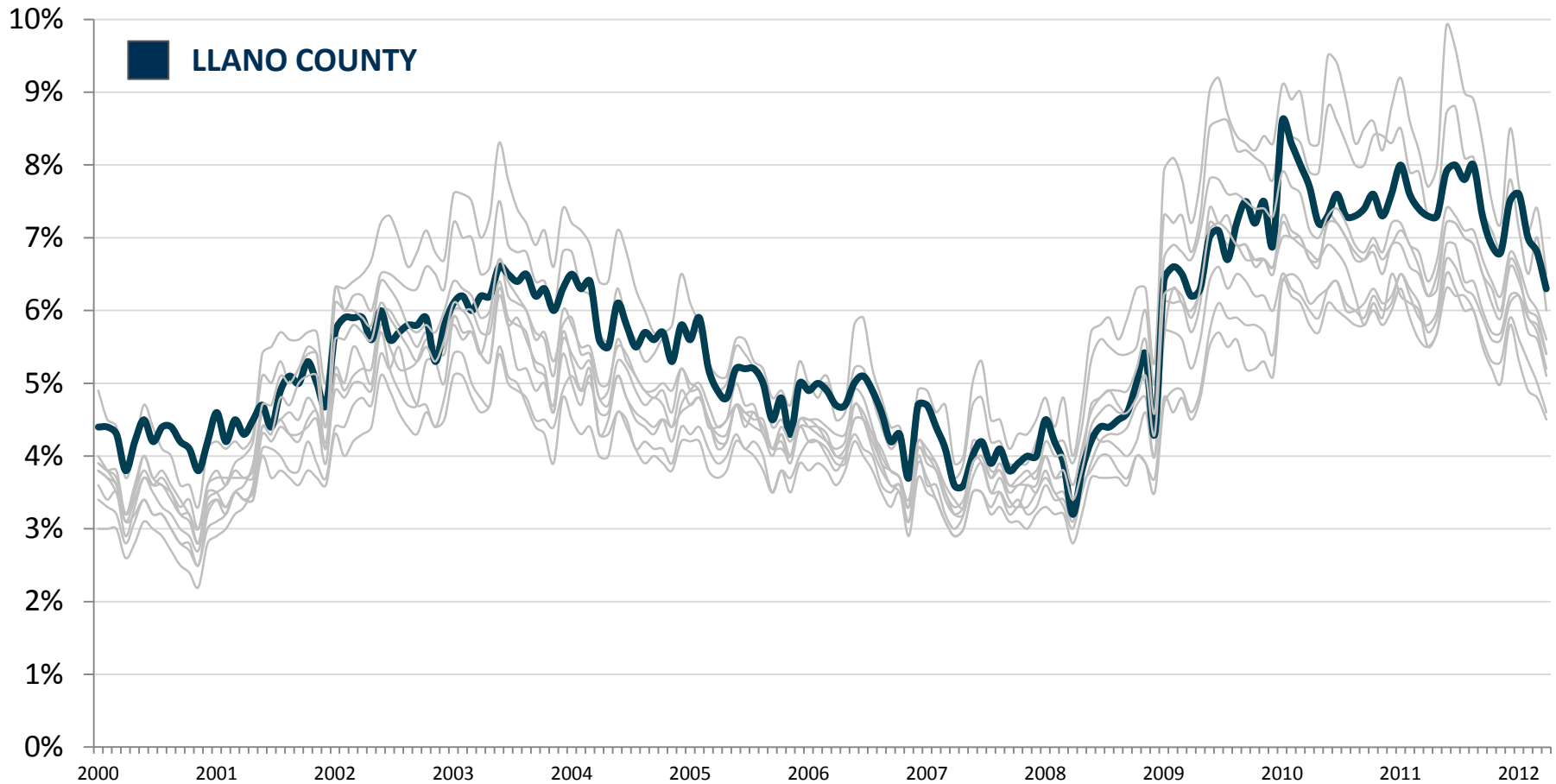


EMPLOYMENT



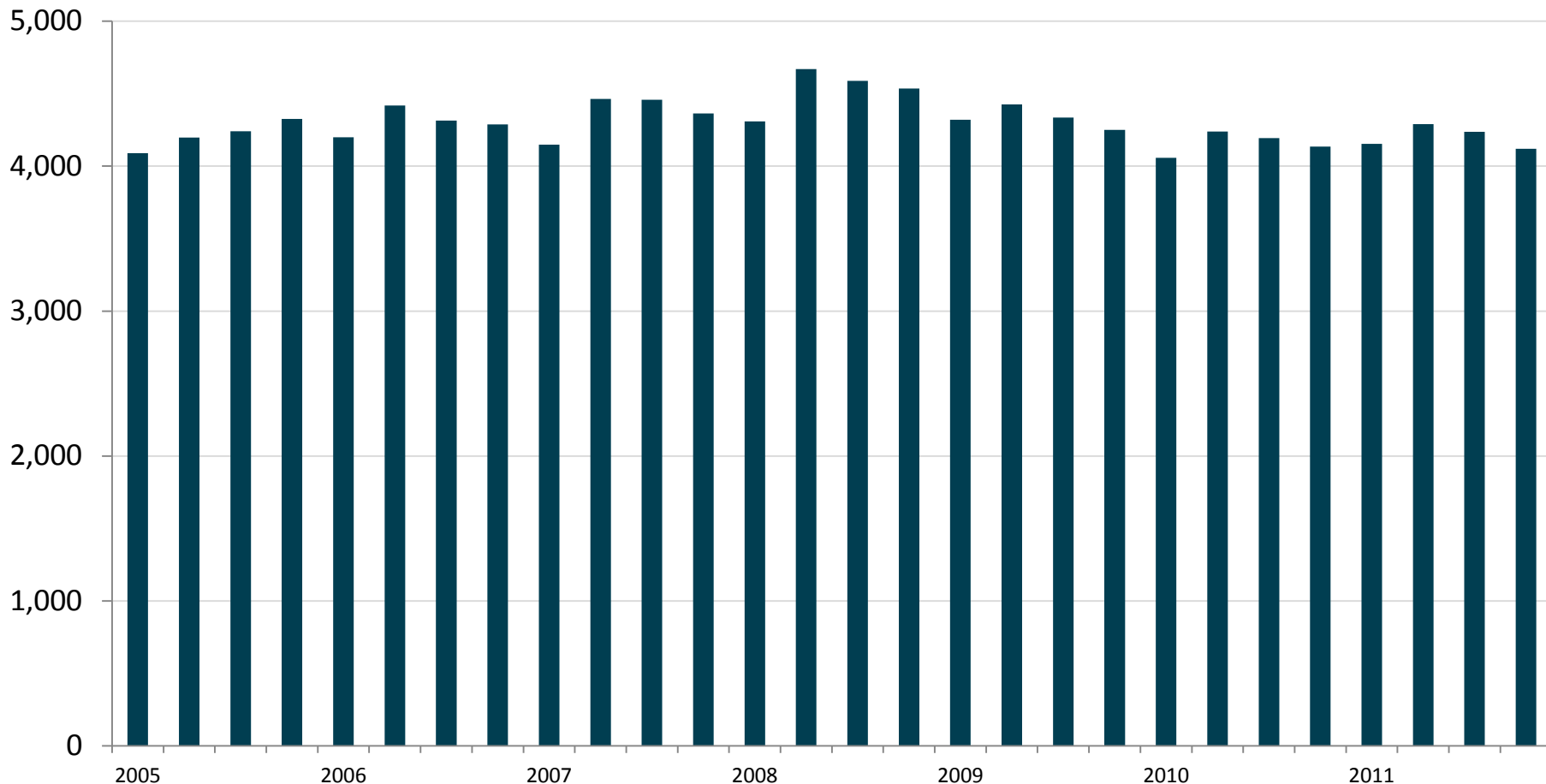
UNEMPLOYMENT – 2000 - 2012

During the past decade, the unemployment rate of Llano County has remained among the highest in the CAPCOG region. Today, the unemployment rate in Llano County is 6.3 percent, approximately a percentage point above the average of the Austin metropolitan region. Still, Llano County's unemployment rate remains well below the national average.



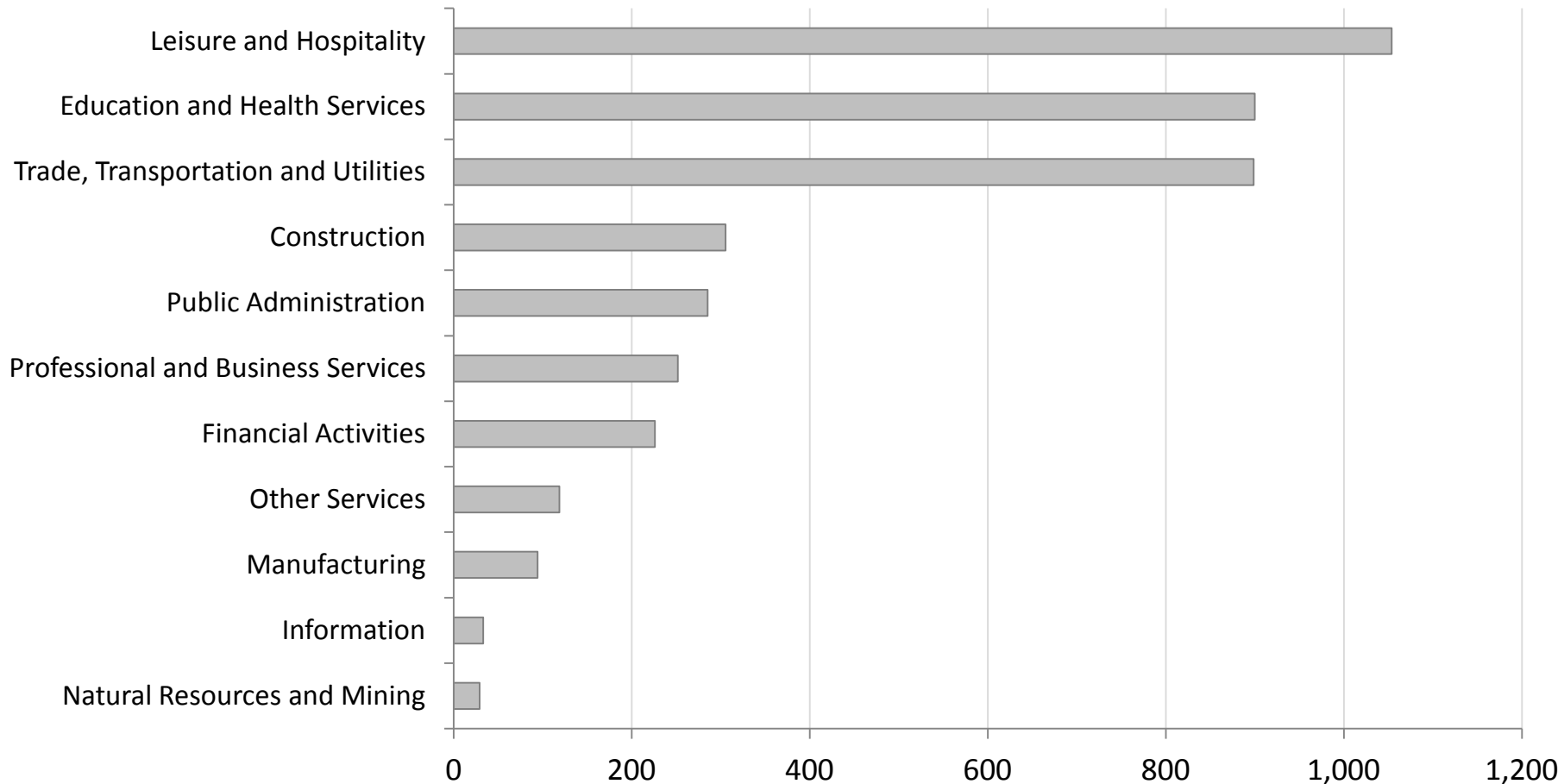
EMPLOYMENT – 2005 - 2011

Since 2005, employment in Llano County has remained remarkably flat. During the past seven years, Llano County has shed approximately a dozen jobs. In 2005, the average employment total for Llano County was 4,213. In 2011, this figure was 4,200. Llano County has yet to recover from the recession; in 2008, the County reached it peak employment of 4,500. Since then, the County has loss approximately 300 jobs.



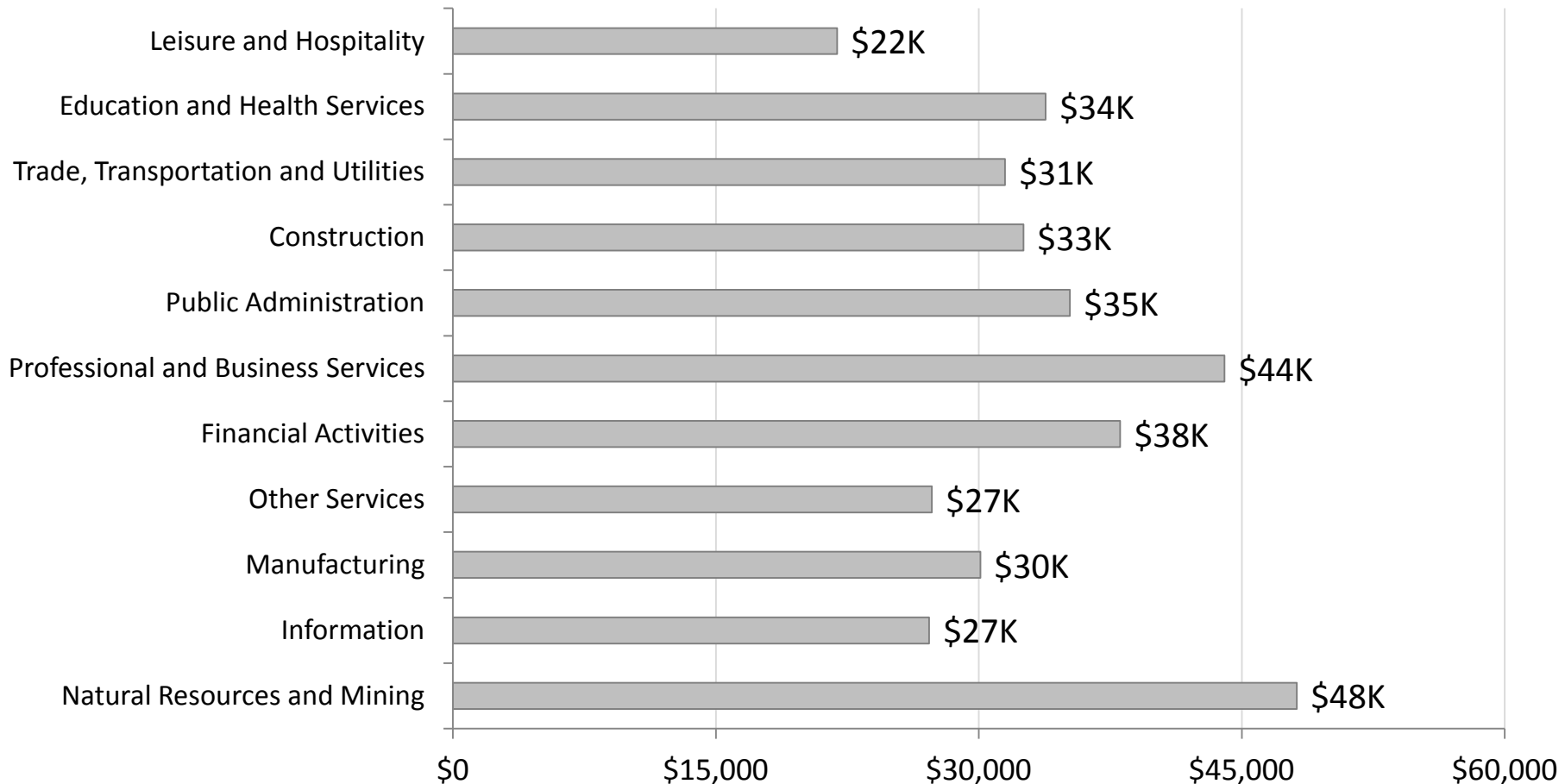
LLANO COUNTY EMPLOYMENT BY INDUSTRY (2011)

With approximately 1,050 workers, Leisure & Hospitality is the largest employment category within Llano County. The other leading employment sectors within Llano County, Education & Health Services and Trade, Transportation & Utilities, each employ approximately 900 workers.



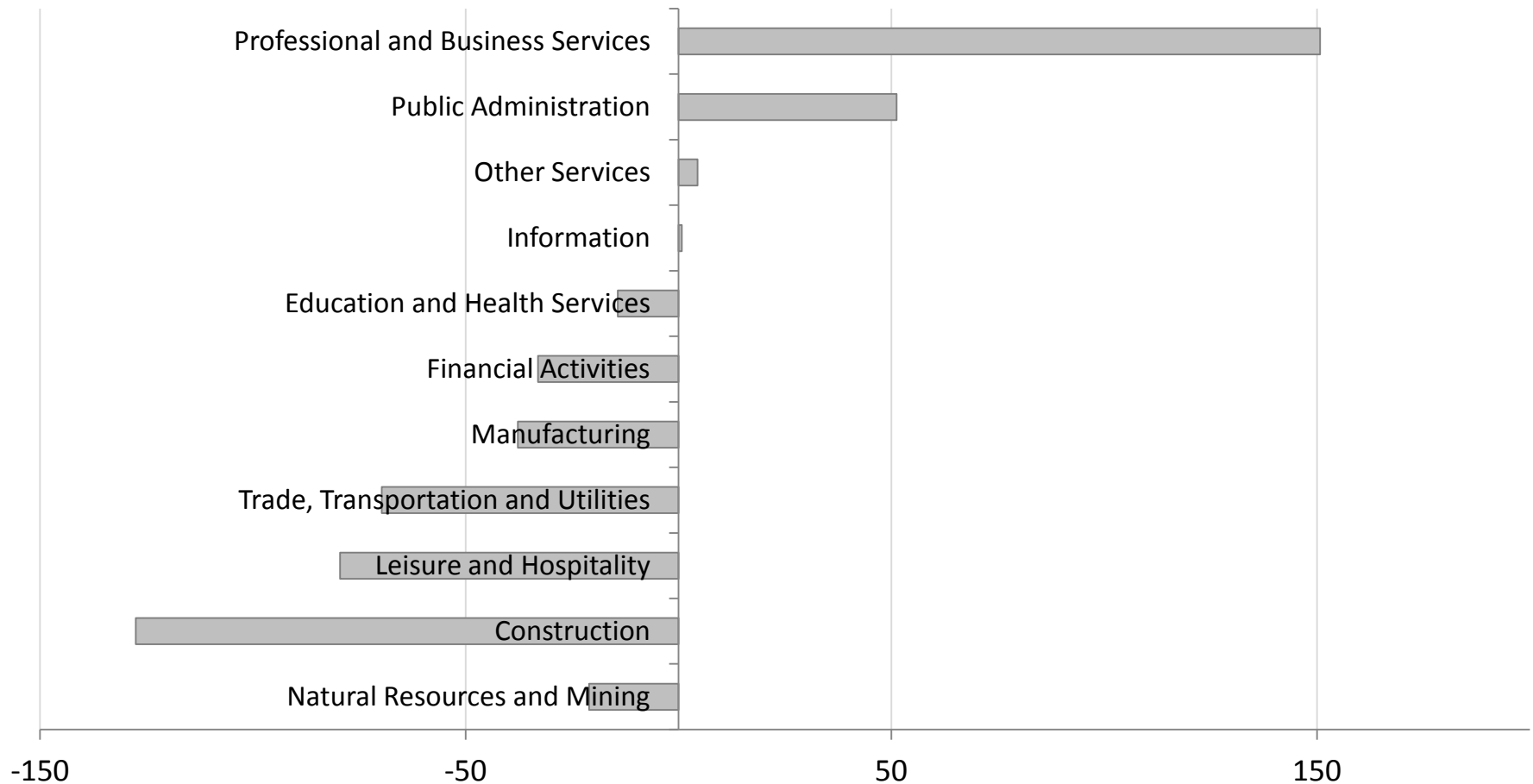
LLANO COUNTY INCOME BY INDUSTRY (2011)

Wages in Llano differ significantly between various industries. The average salary for the highest-paying employment sector in Llano, Natural Resources & Mining, is approximately \$48,000—more than twice the average salary of the lowest-paying employment sector Llano, Leisure & Hospitality. Furthermore, there are thirty-three workers in Leisure & Hospitality for every one in Natural Resources & Mining



LLANO COUNTY EMPLOYMENT BY INDUSTRY (2006 – 2011)

During the past five years, the Professional & Businesses employment sector has added the greatest number of jobs within Llano County. Public Administration added the second-greatest number of jobs during this period. Outside of 'Other Services' and Information, all other employment sectors have experienced employment declines since 2006.

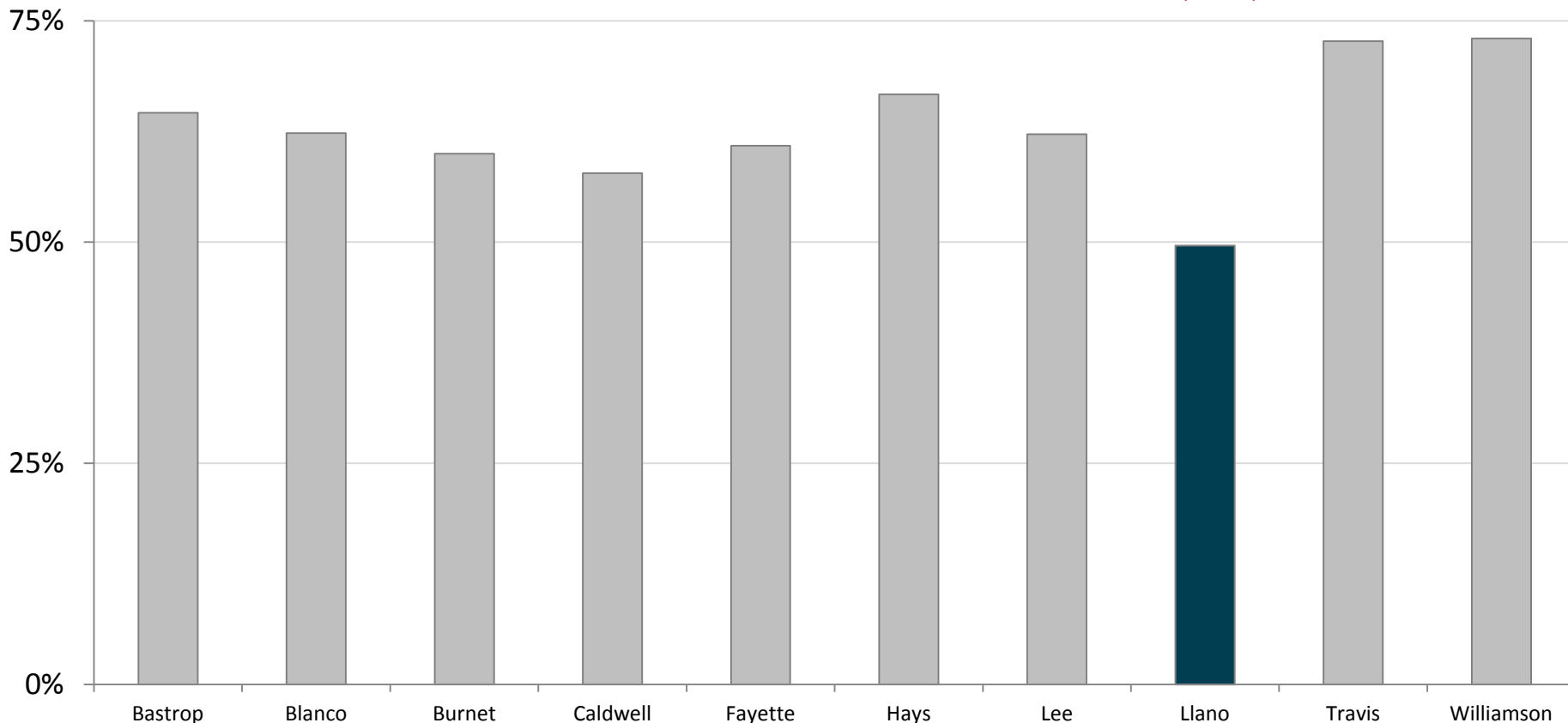


LLANO COUNTY EMPLOYMENT DYNAMICS (2010)

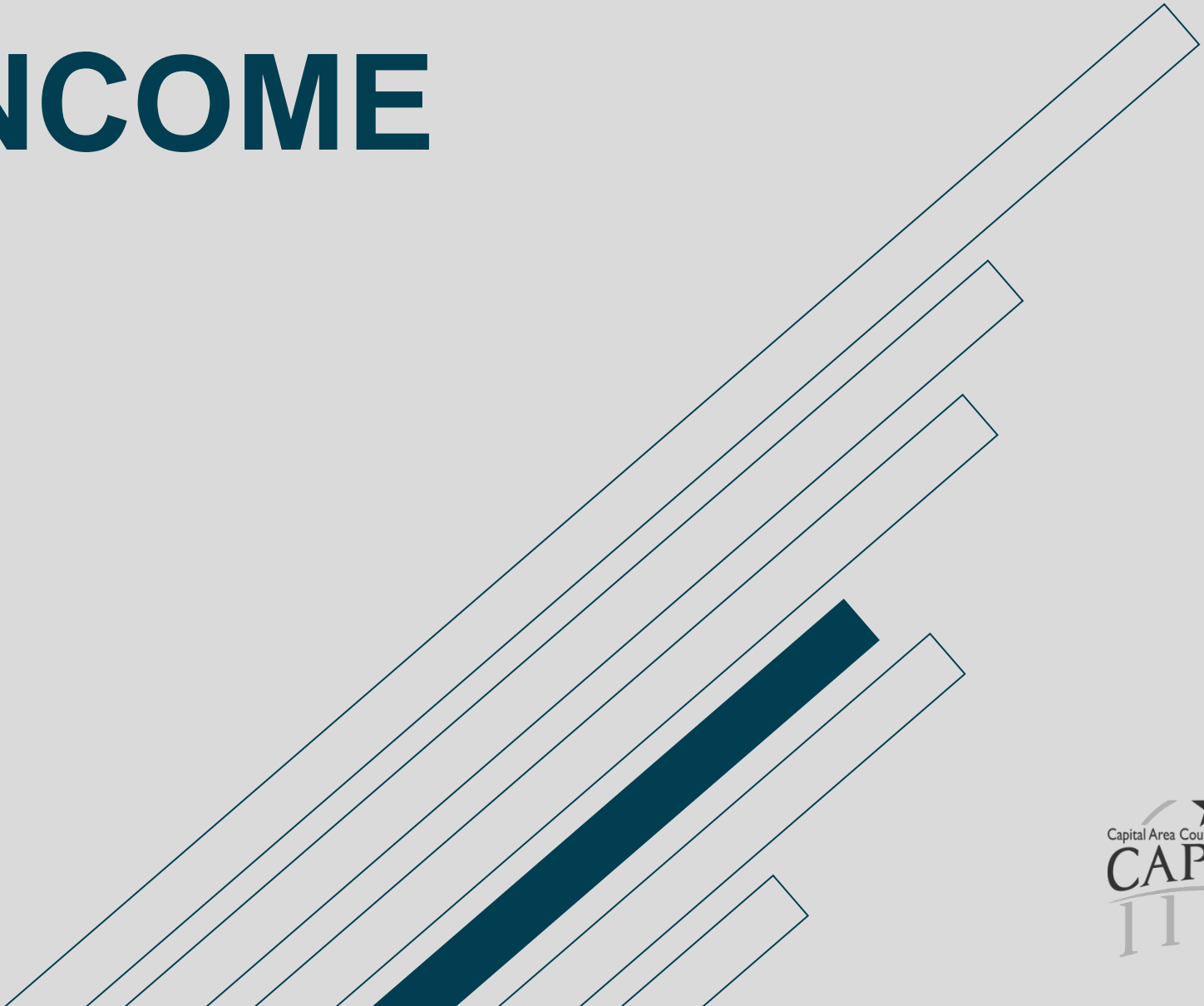
Llano County has the second lowest rate of labor participation within the CAPCOG region; less than half of all individuals age 16 and older are in the labor force. The labor force is defined as the total population of workforce age that is actively employed or seeking employment. Llano County's labor force participation rate is approximately 15 percentage points lower than the national average.



PORPORTION OF POPULATION AGE 16+ IN LABOR FORCE (2010)

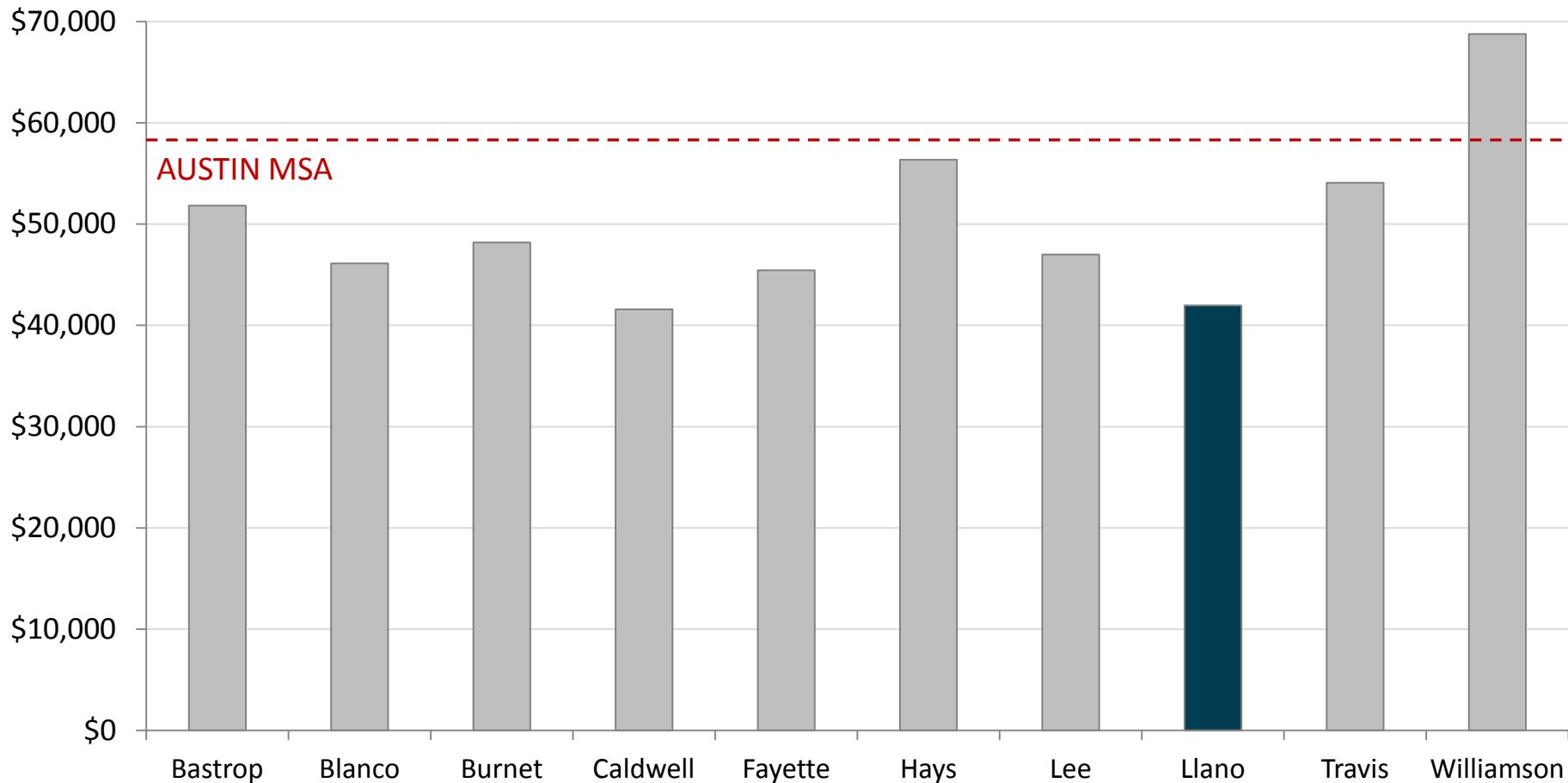


INCOME



MEDIAN HOUSEHOLD INCOME (2010)

Median household income in Llano County is approximately \$42,000. Within the 10-county CAPCOG region, only Caldwell County has a lower median household income. Median household income in Llano County is approximately \$15,000 lower than the median household income of the 5-county Austin metropolitan region.

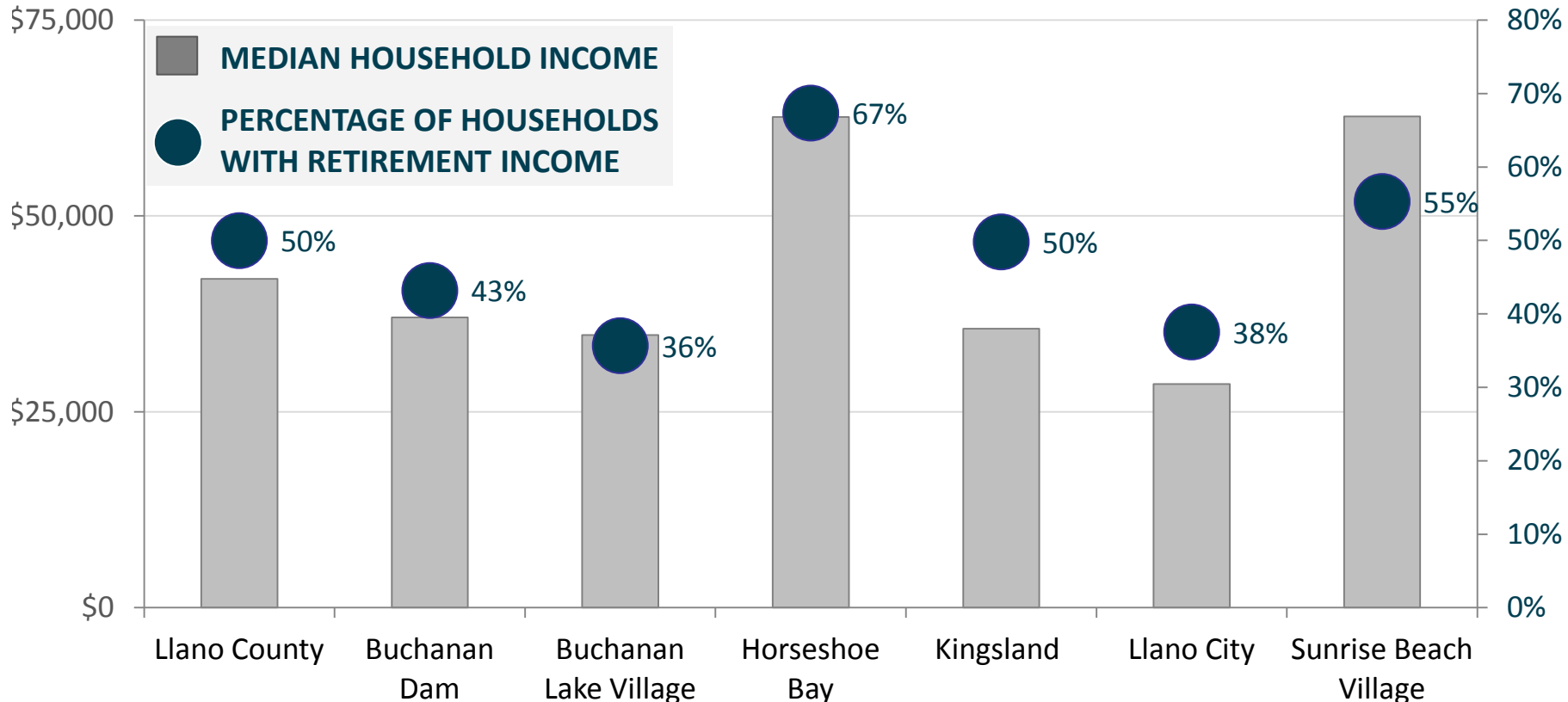


THE DIVERGENCE BETWEEN WORK AND INCOME (2010)

At the city level, income within Llano County diverges markedly between individuals who are in the labor force and individuals who are retired. On average, cities with high proportions of retired individuals also have higher median household incomes. The divergence between work and income suggests that Llano is home to two distinct populations—affluent retirees and less-wealthy workers.

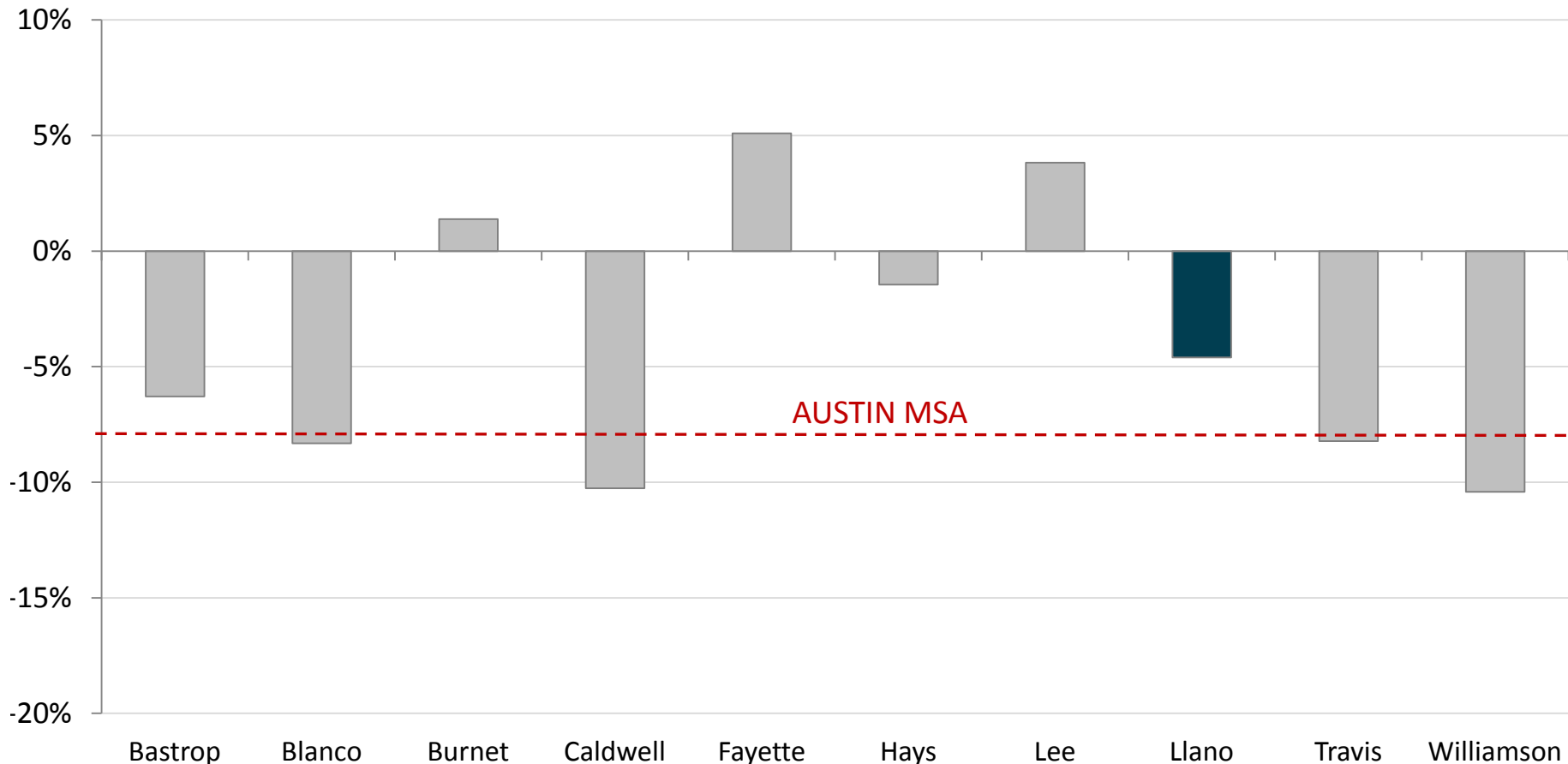


— RELATIONSHIP BETWEEN MEDIAN HOUSEHOLD INCOME & PERCENTAGE OF HOUSEHOLDS WITH RETIREMENT INCOME —



CHANGE IN MEDIAN HOUSEHOLD INCOME (2000 vs. 2010)

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



AFFORDABILITY

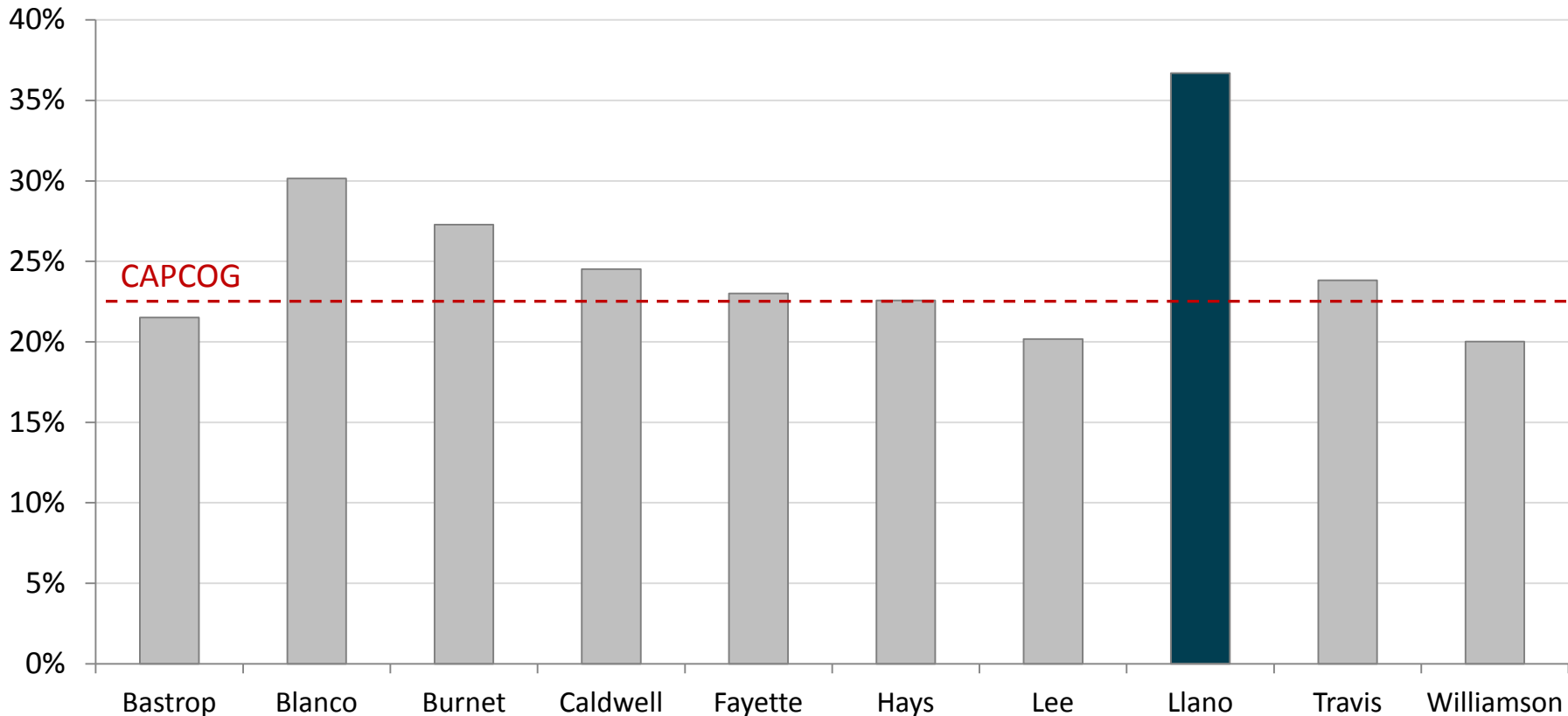


HOUSING AFFORDABILITY (2000)

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, nearly 37 percent of homeowners in Llano County with a mortgage spent more than 30 percent of their income on housing—a higher proportion than any other county in the CAPCOG region.



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

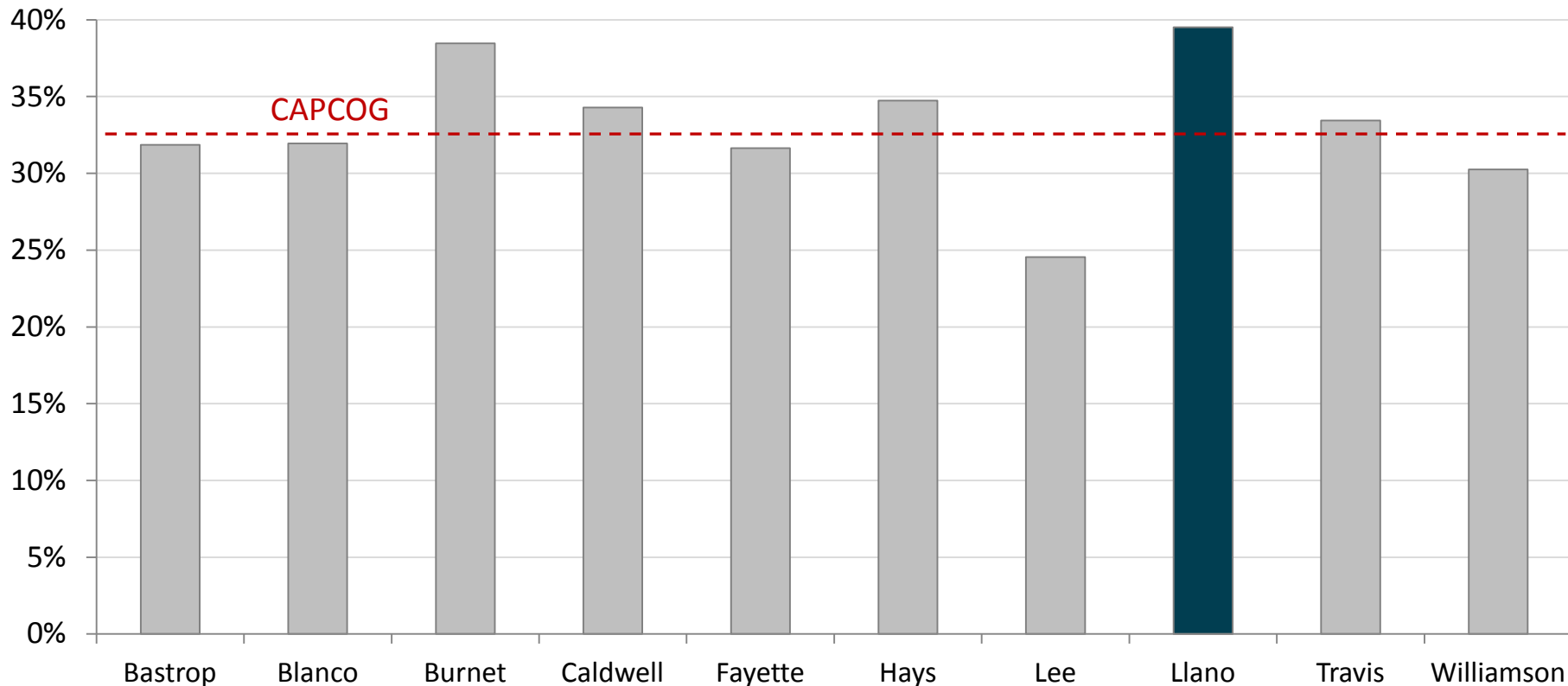


HOUSING AFFORDABILITY (2010)

In 2010, the percentage of homeowners in Llano County with a mortgage that spent more than 30 percent of their income on housing increased to nearly 40 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 —



COMMUTING PATTERNS

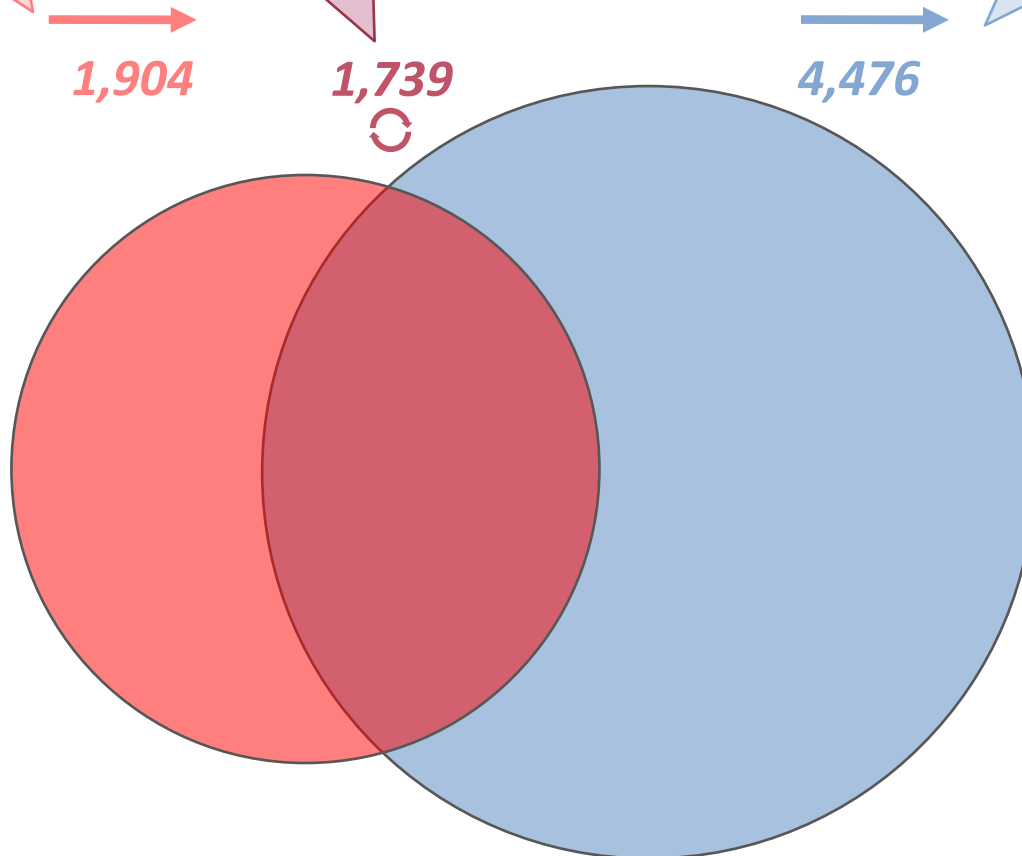


DAILY COMMUTING PATTERN BALANCE - LLANO COUNTY

A The light red circle depicts workers who commute into Llano County for work

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

C The blue circle depicts workers living in Llano County who commute to another county for employment.

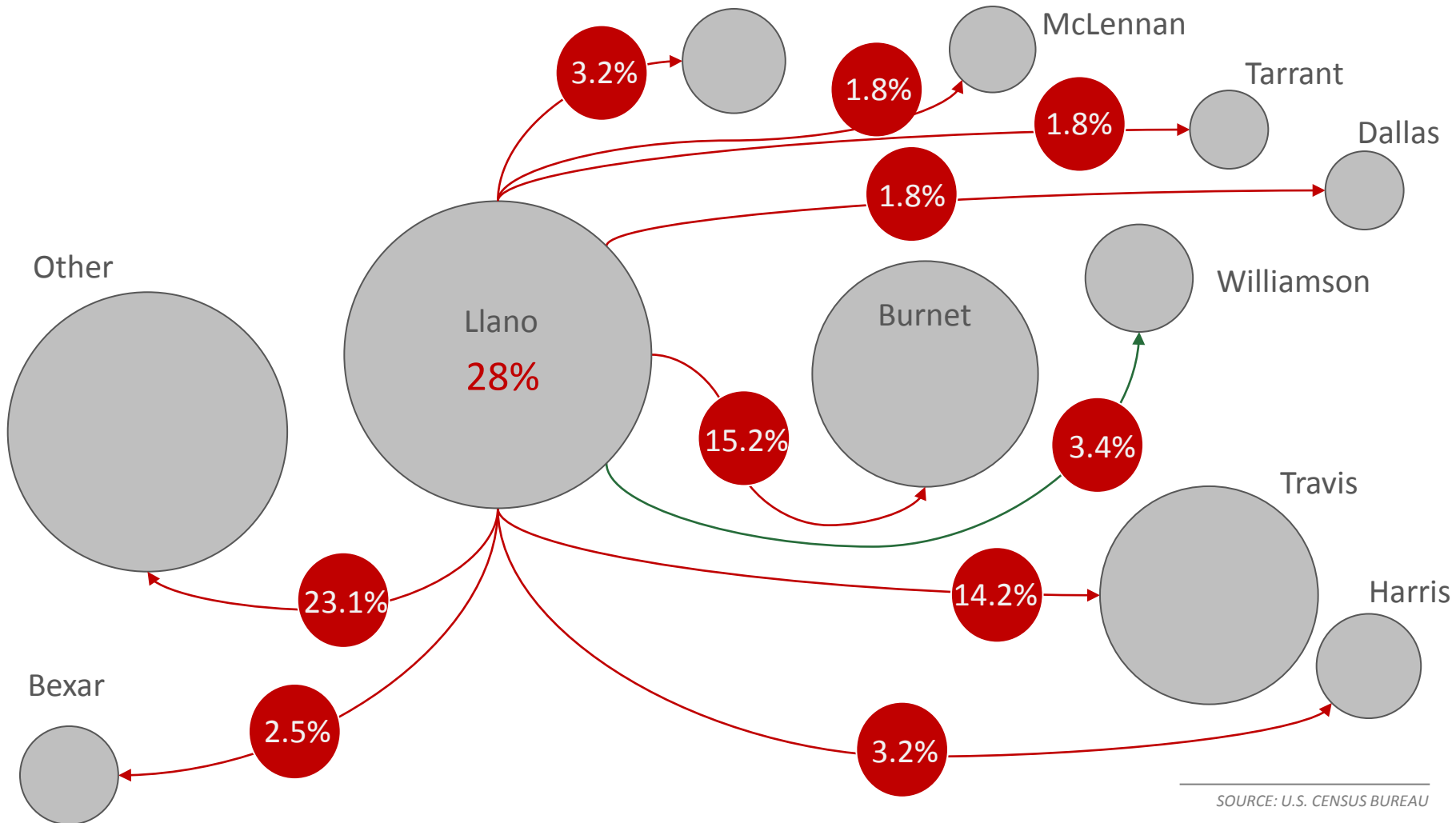


$A + B =$ INDIVIDUALS WORKING IN COUNTY

$B + C =$ WORKERS LIVING IN COUNTY

LLANO COUNTY – WHERE RESIDENTS WORK?

Nearly 75 percent of Llano County employed residents commute to jobs outside of the county. Burnet County is the largest recipient of Llano County workers, closely followed by Williamson County. The remaining workers that leave Llano County for employment are dispersed throughout Central Texas.



LLANO COUNTY – WHERE WORKERS LIVE?

Just as many residents of Llano County work in other jurisdictions, many outside residents are employed within Llano County. Every day, more than half of all individuals working in Llano County commute from another county. The top ten origins of worker in Llano County residents are listed below. Burnet County is the largest external source Llano County workers; nearly 15 percent of workers in Llano County live in Burnet County.

