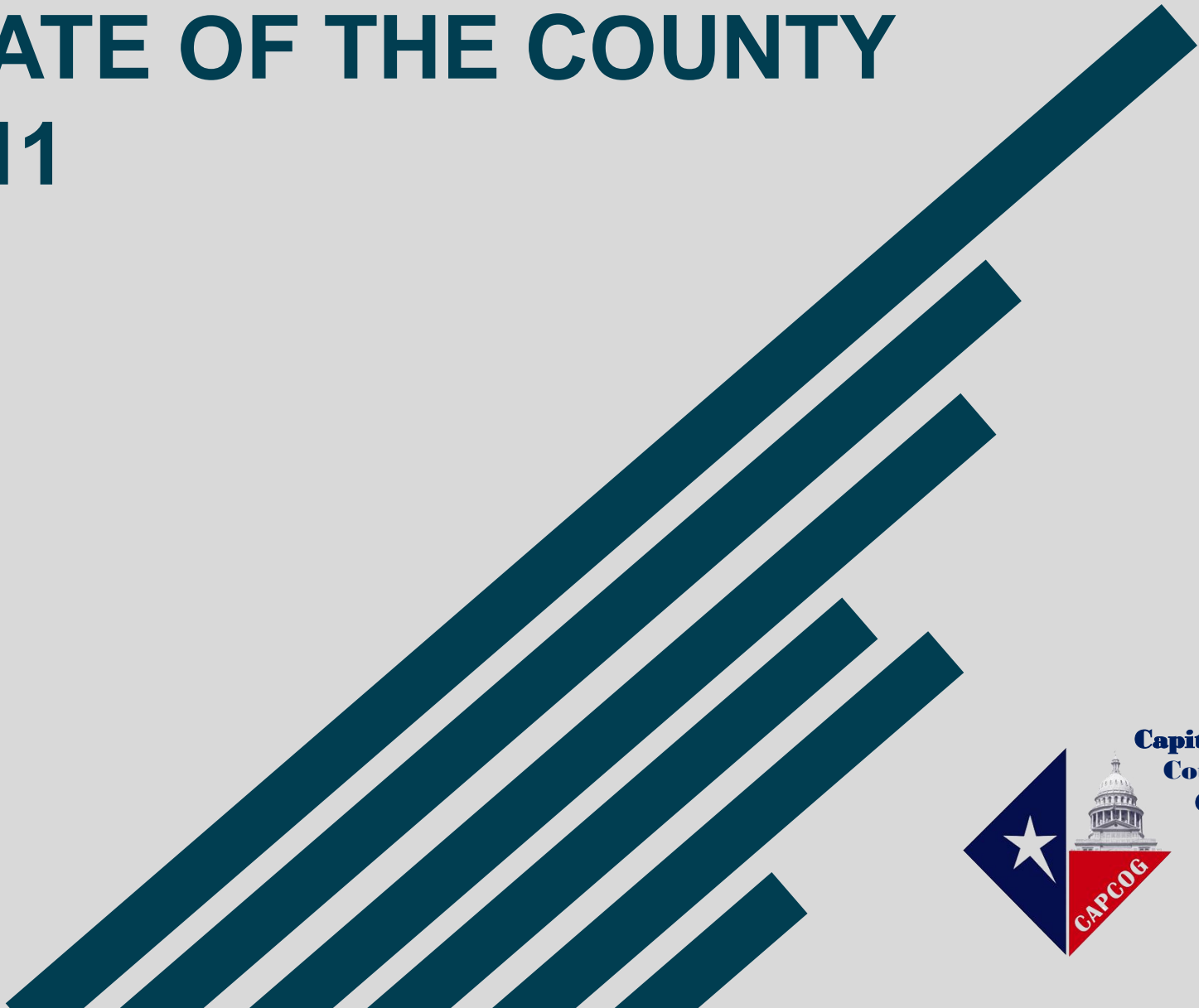
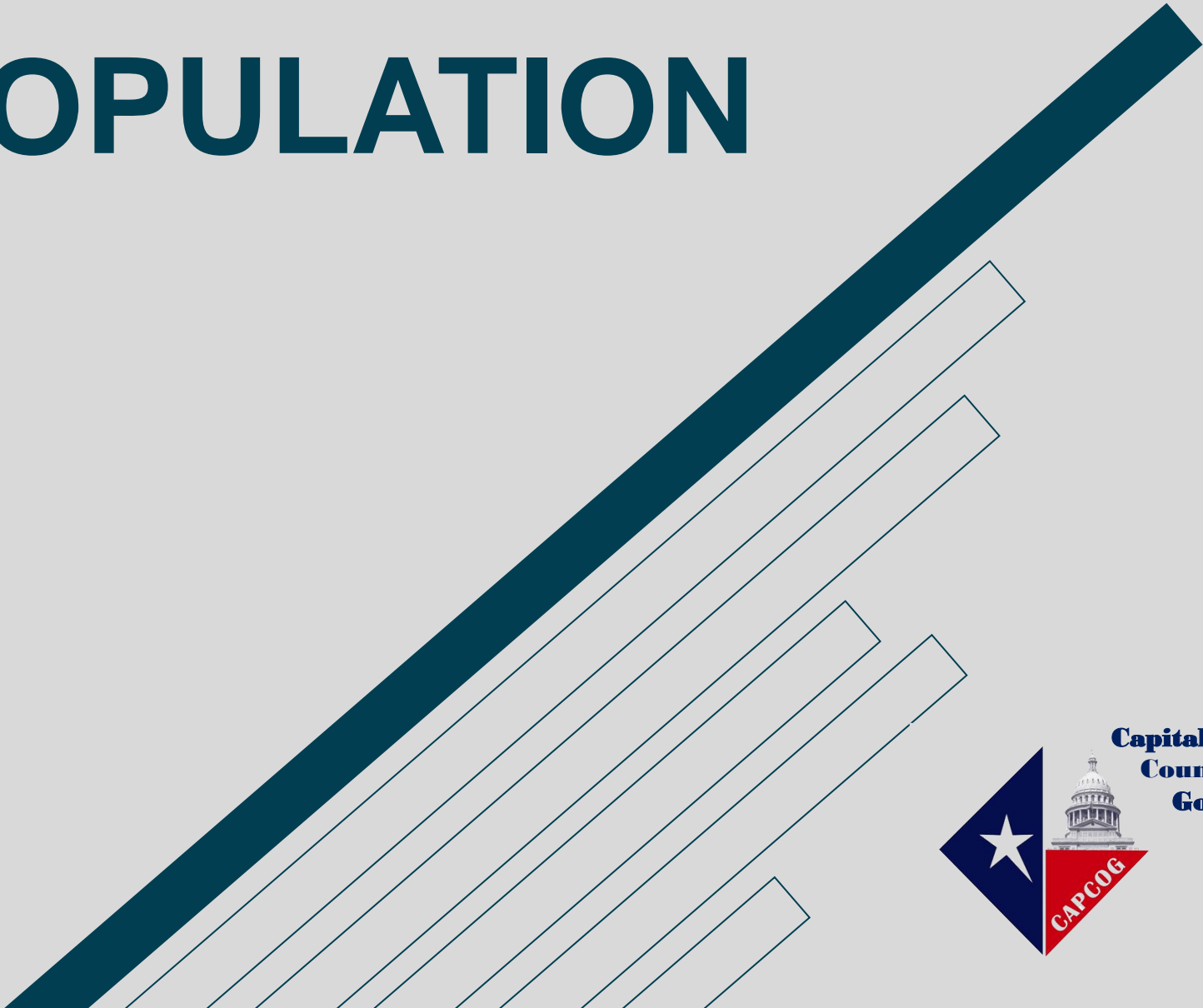


WILLIAMSON STATE OF THE COUNTY 2011



POPULATION

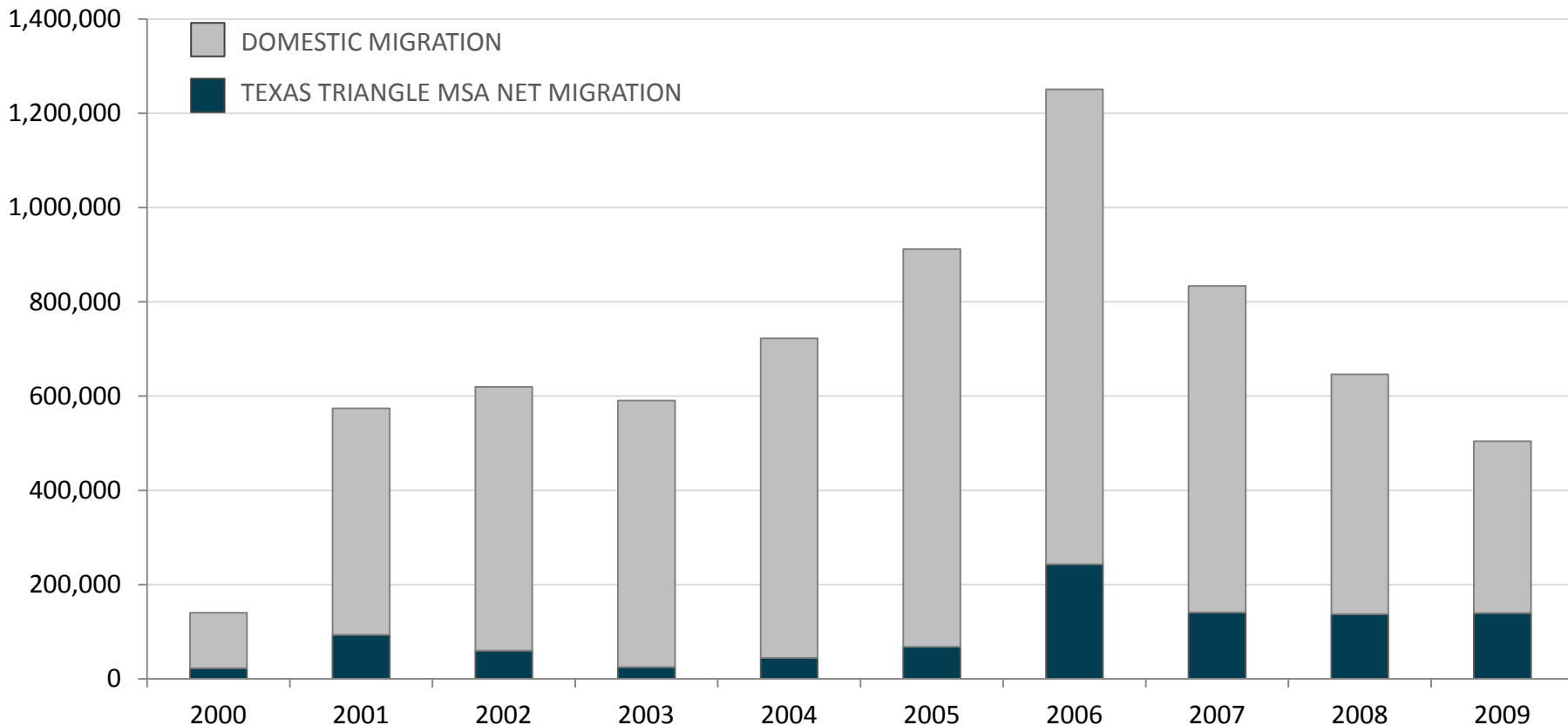


POPULATION – THE RISE OF TEXAS

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.

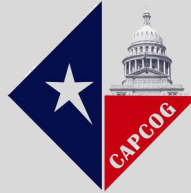


U.S. INTERNAL MIGRATION PATTERNS (2000 – 2009)

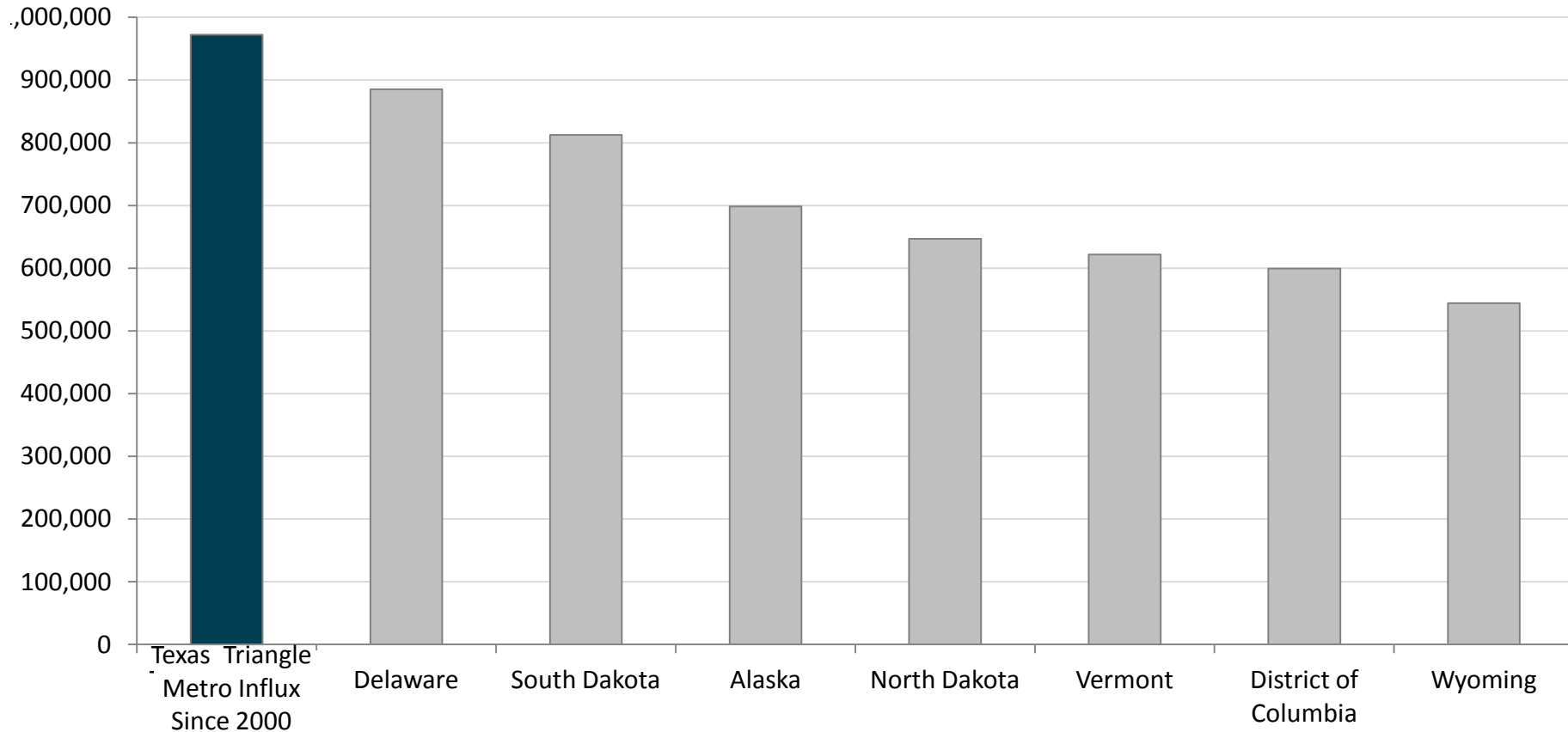


POPULATION – THE RISE OF TEXAS

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

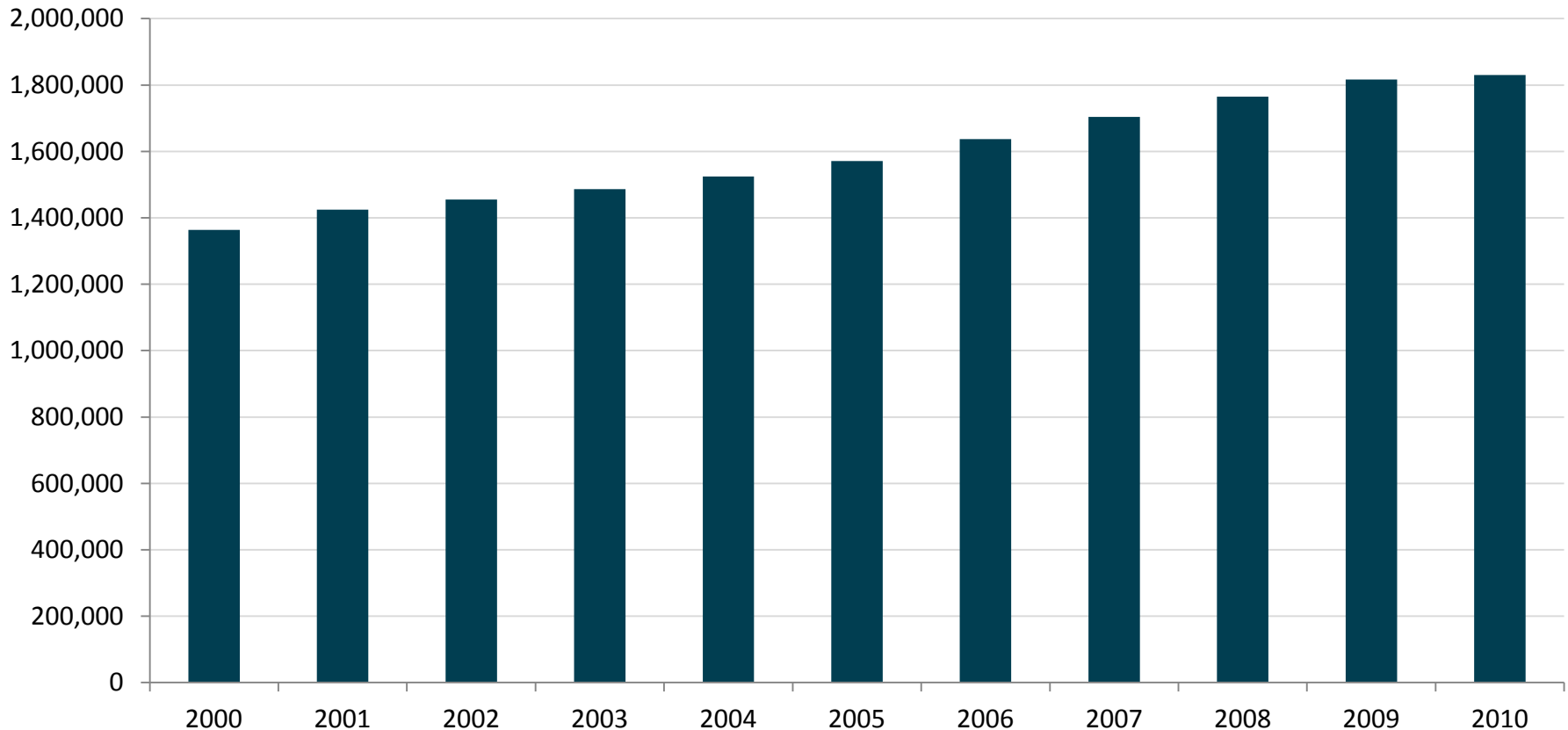


POPULATION – CAPCOG REGION GROWTH

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

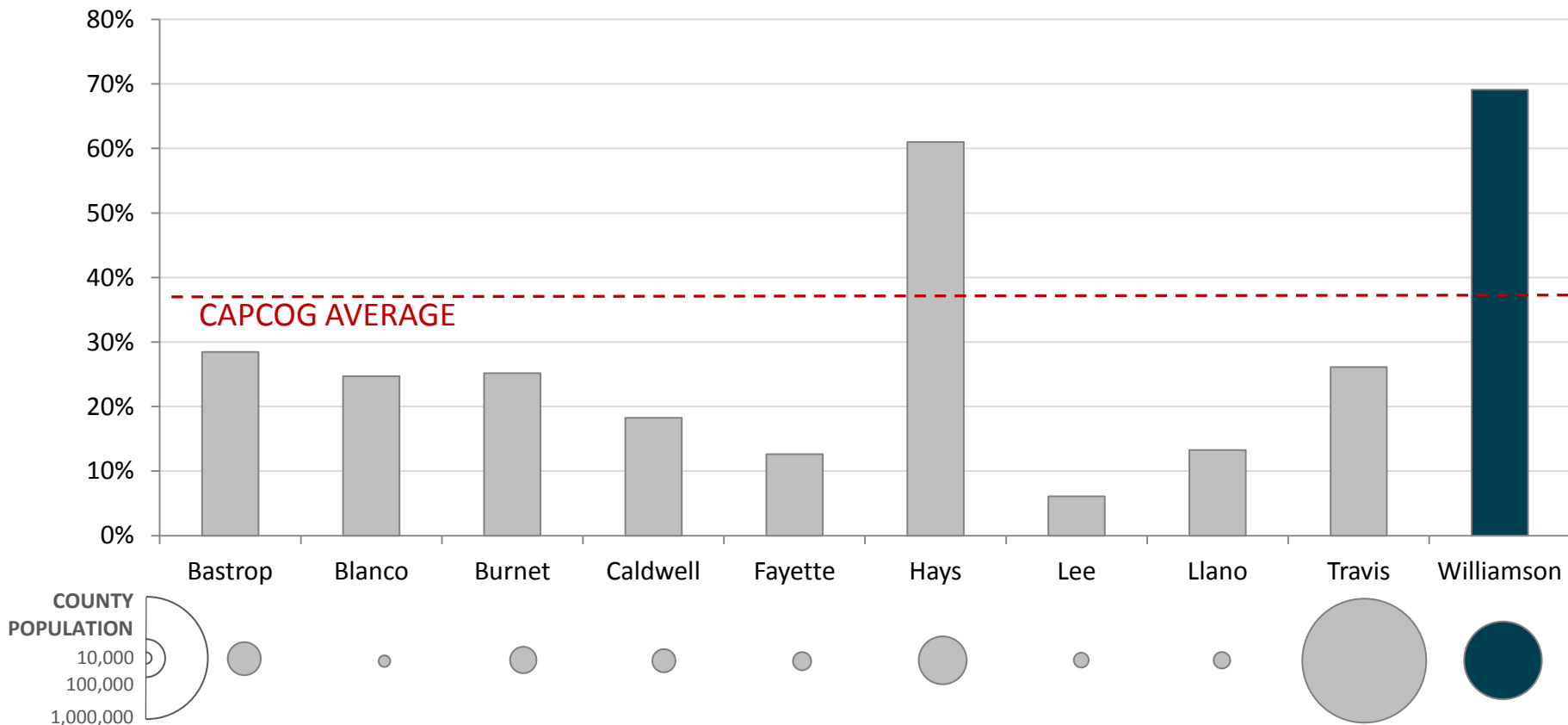


POPULATION – CAPCOG REGION GROWTH

Within the CAPCOG region, Williamson County experienced the fastest rate of growth during the past decade. Since 2000, the population of Williamson County has increased by 69 percent. The population of Travis County, the traditional engine of growth within the region, increased by just 26 percent during the past decade (although the County added the greatest number of new residents).

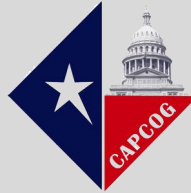


POULATION GROWTH OF 10-COUNTY CAPCOG REGION (2001 TO 2010)



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 Williamson County, migration now accounts for more than 75 percent of all population gains.

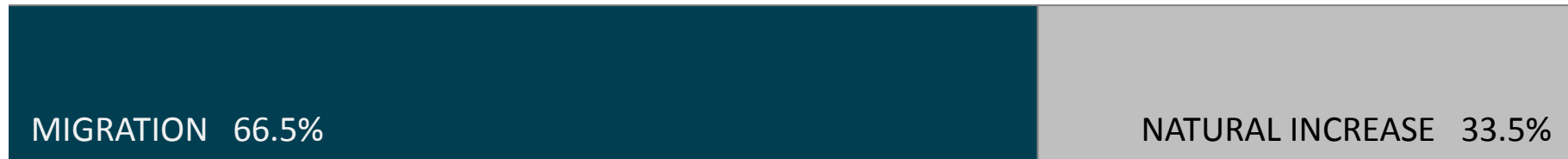


POPULATION GROWTH : MIGRATION VS. NATURAL INCREASE (2000 – 2009)

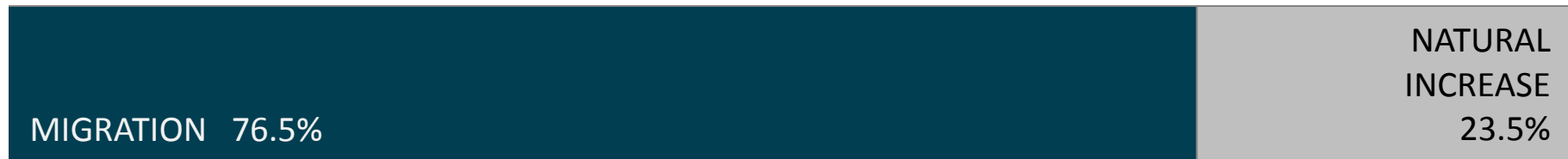
U.S.



CAPCOG

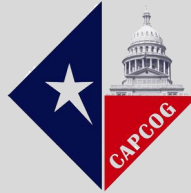


WILLIAMSON COUNTY

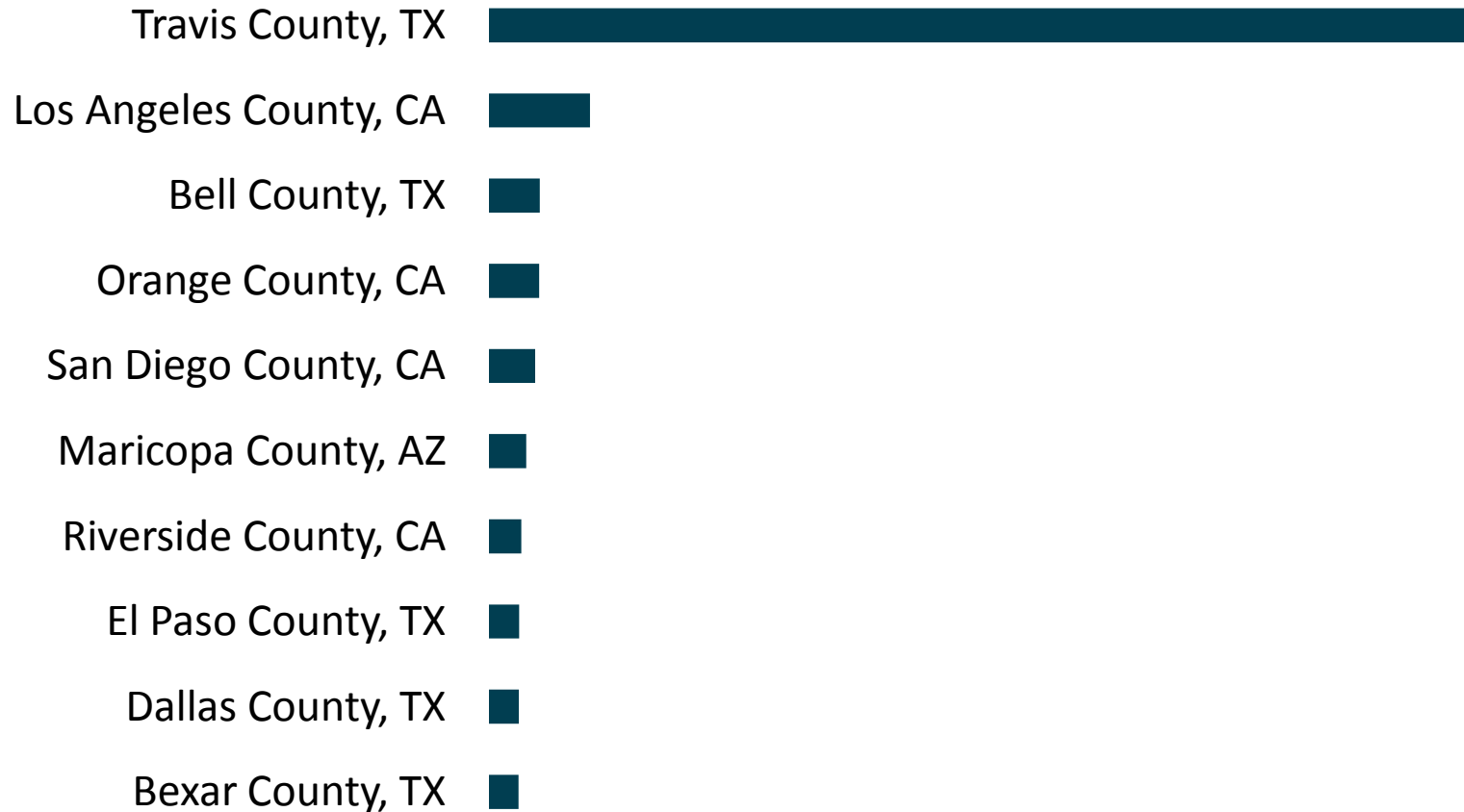


POPULATION – HAYS COUNTY IN-MIGRATION PATTERNS

Within the region, Travis County serves as a giant funnel for migrants. Each year, thousands of people move to Travis County from major metropolitan areas throughout the country. In turn, many of these people later move to surrounding counties. Williamson County is one of the primary recipients of this second-wave migration dynamic. Between 2007 and 2008, the overwhelming share of migrants to Williamson County were from Travis County. A smaller number of migrants moved from other parts of Texas and California.

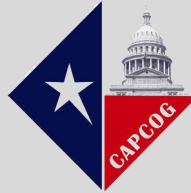


ORIGIN OF IN-MIGRANTS TO WILLIAMSON COUNTY (2007-2008)

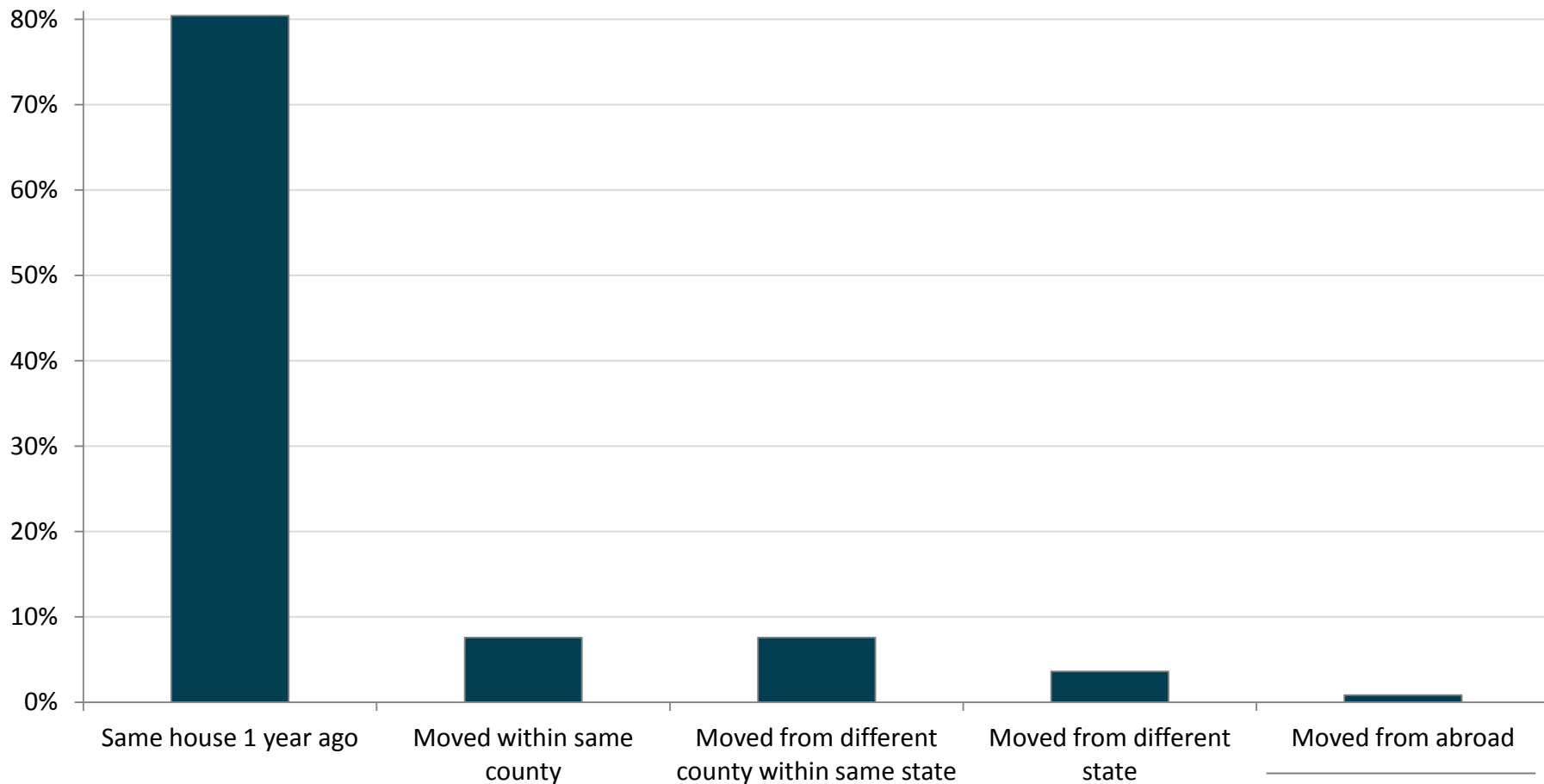


POPULATION – CAPCOG REGION GROWTH

Williamson continues to lure a significant number of new residents each year. Between 2008 and 2009, 12 percent of all residents within Williamson 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 and international residents accounted for nearly five percent of the total population of Williamson County in 2009.

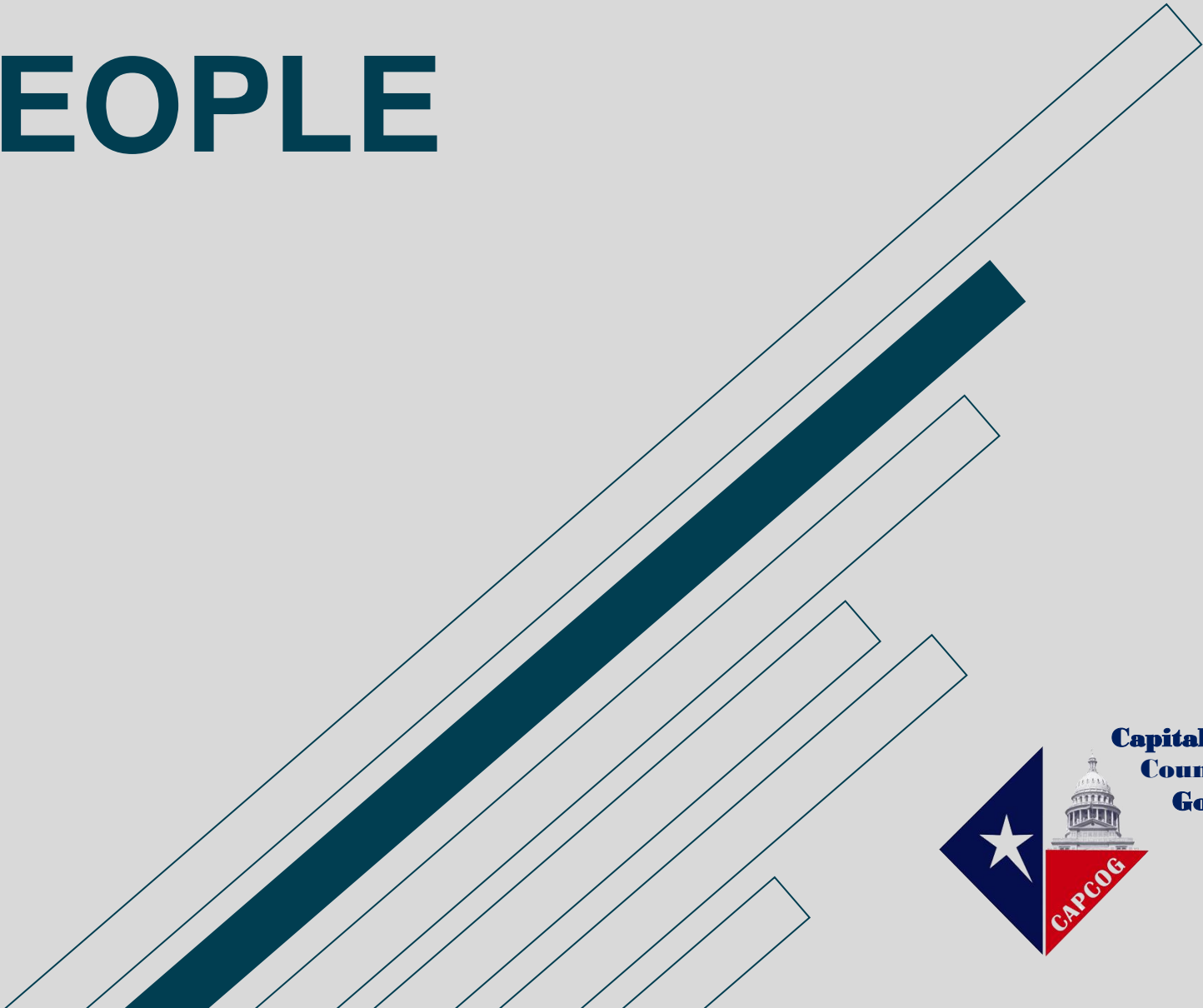


GEORGAPHIC MOBILITY OF POPULATION AGE 1 AND OLDER (2008 TO 2009)



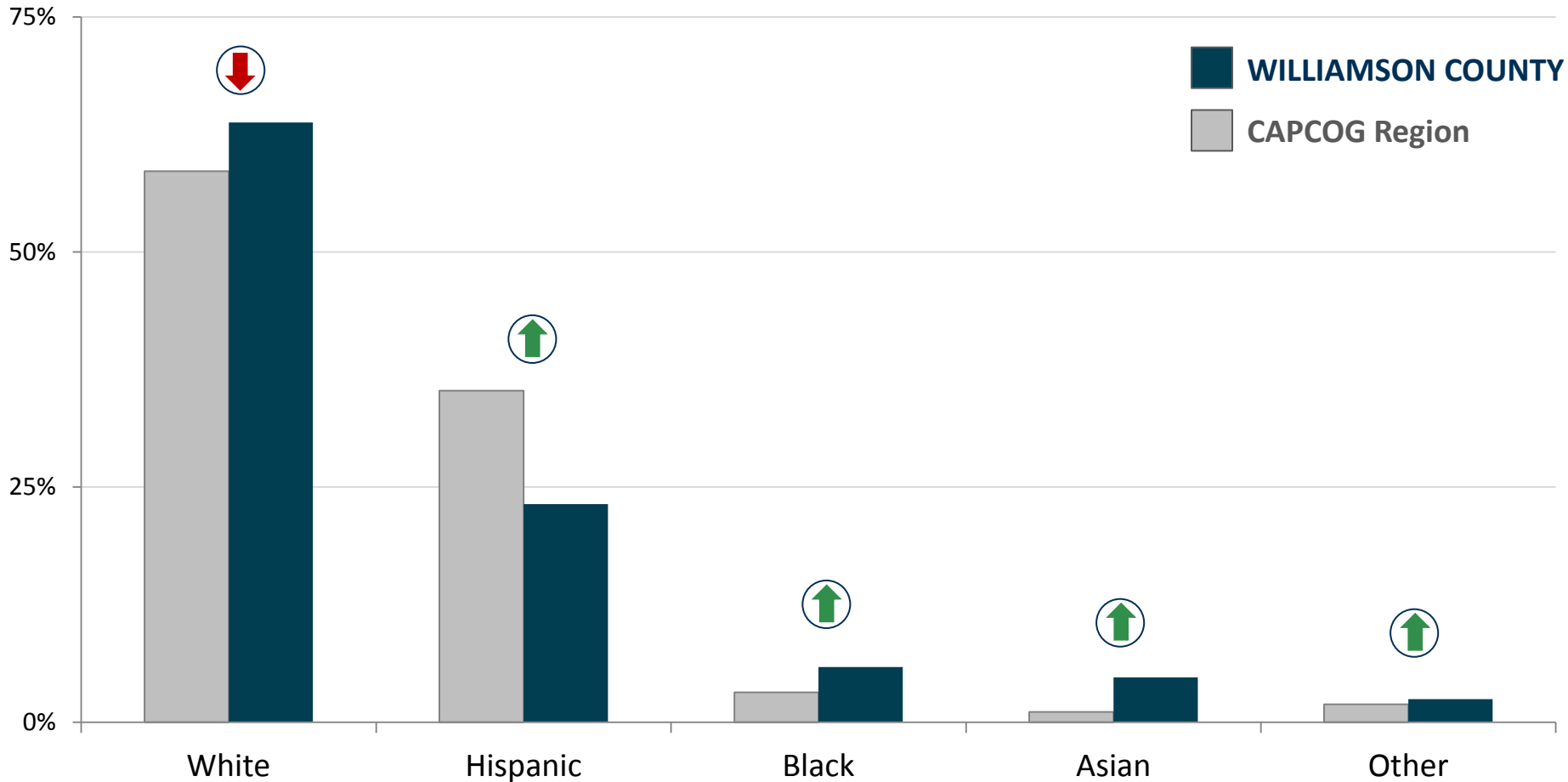
SOURCE: U.S. CENSUS BUREAU

PEOPLE



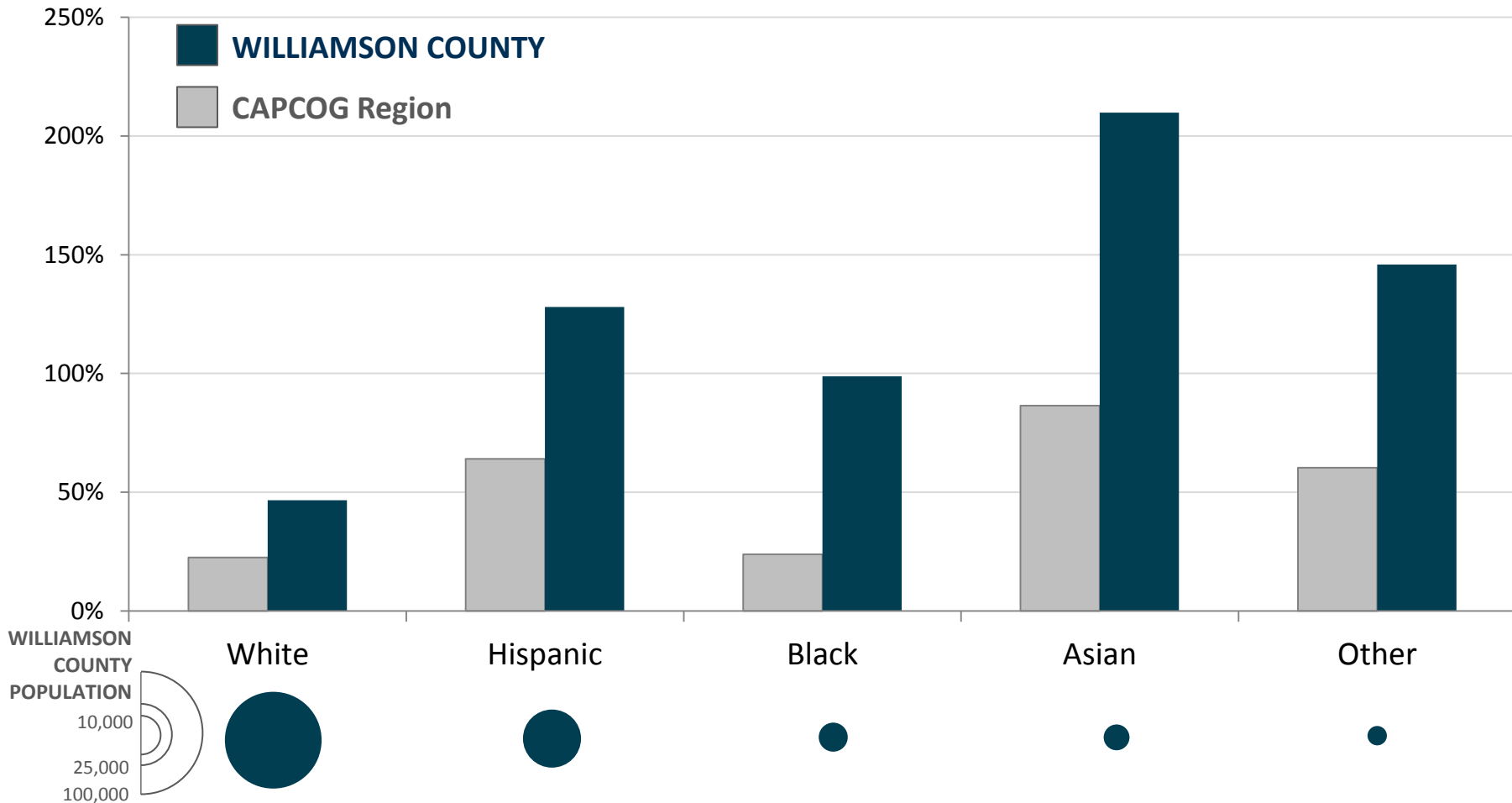
PEOPLE - RACIAL & ETHNIC COMPOSITION - 2010

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



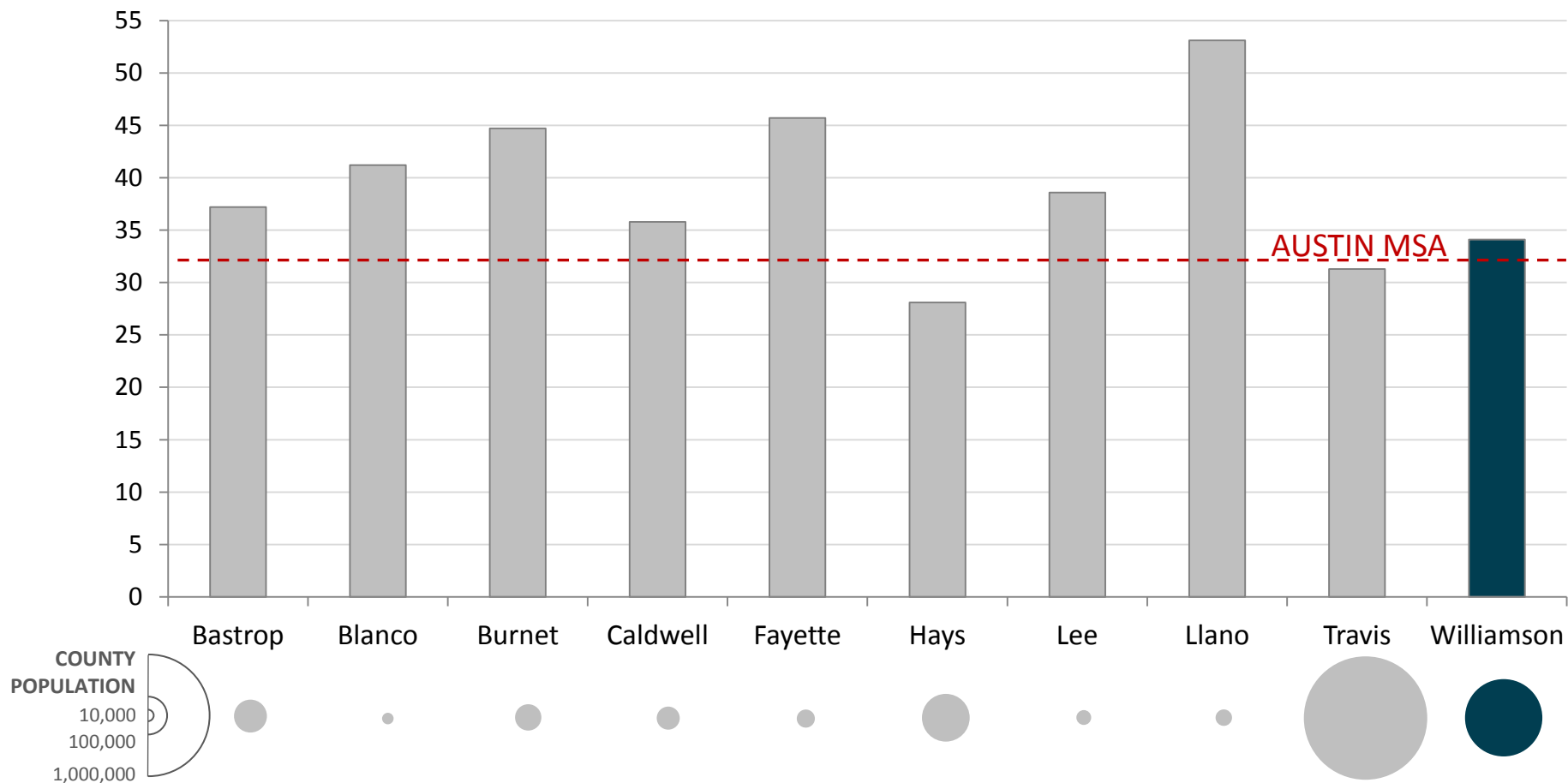
PEOPLE - GROWTH BY RACIAL & ETHNIC GROUP (2000 – 2010)

Every racial and ethnic group within Williamson County is not only experiencing growth, but also increasing at a greater pace than the regional average. Asian residents are the fastest-growing racial/ethnic group within Williamson County; since 2000, this population has increased more than 200 percent. Hispanic residents are the second-fastest growing single racial/ethnic group in Williamson County. During the past decade, this population has increased 128 percent.



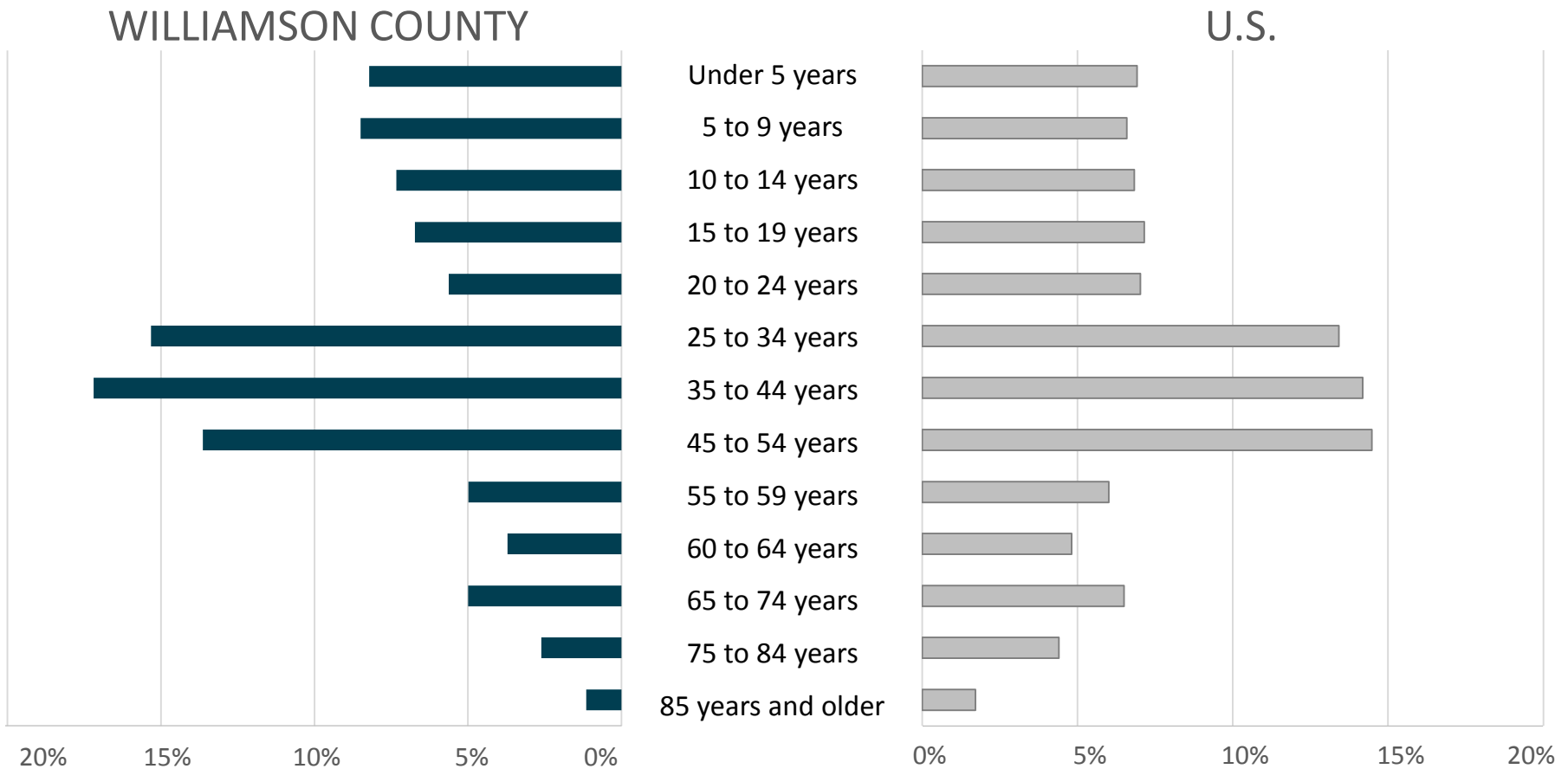
PEOPLE – MEDIAN AGE (2005-2009)

Williamson County is the third-youngest county in the CAPCOG region, with a median age of just 34.1—approximately 2 years younger than the national figure.



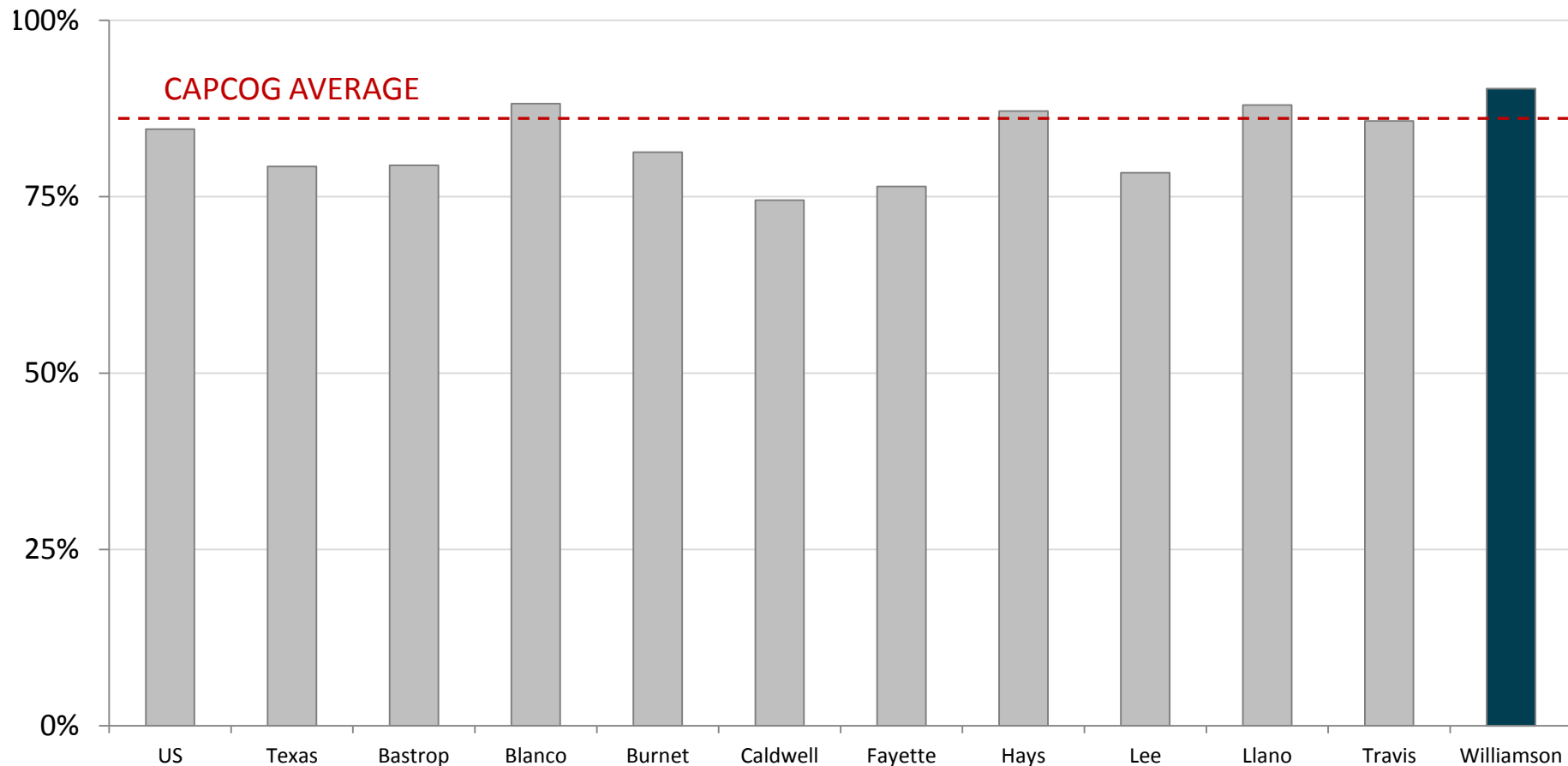
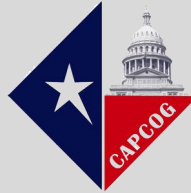
PEOPLE – AGE DISTRIBUTION (2005-2009)

The relative youth of Williamson County is further reflected in the age distribution of the County. Nationally, for example, approximately 38 percent of Americans are 45 years and older. In Williamson County, this figure is barely 31 percent. Conversely, in comparison to national figures, Williamson County features a higher proportion of people in virtually all age cohorts younger than 45.



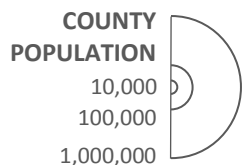
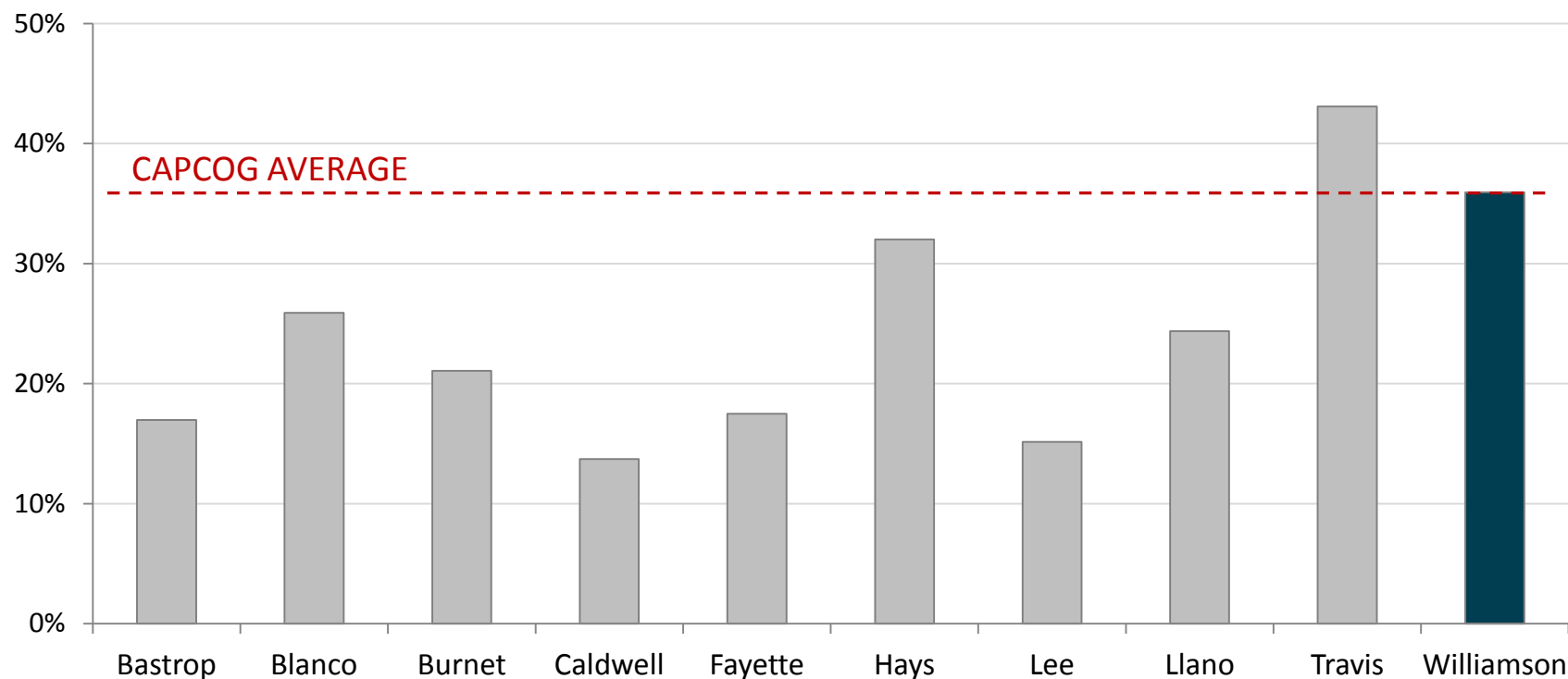
PEOPLE – H.S. EDUCATIONAL ATTAINMENT (2005-2009)

Approximately 90 percent of all residents 25 years and older within Williamson County possess a high school (or equivalent) degree. Within the CAPCOG region, no other county features a higher level of high school educational attainment.



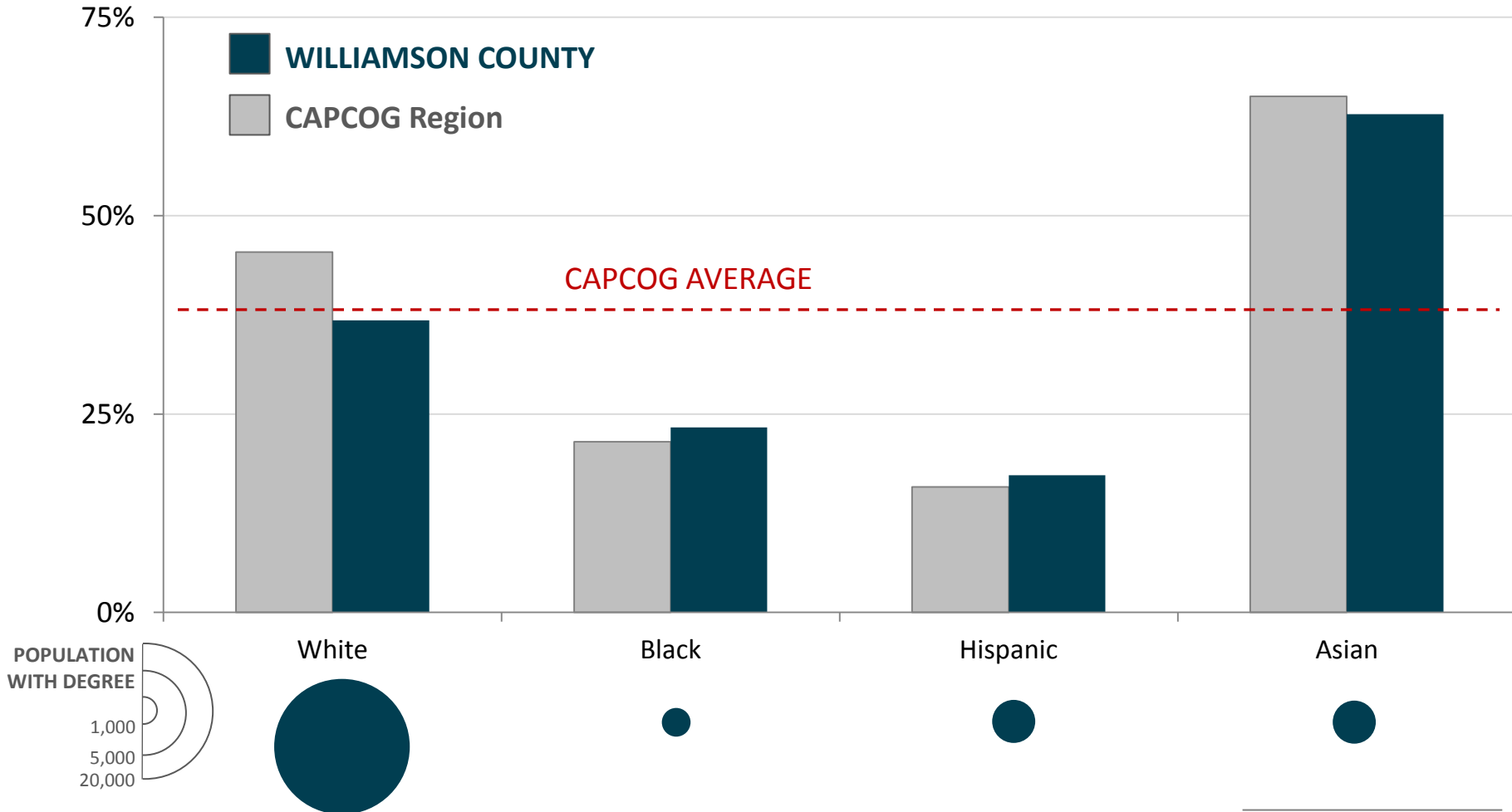
PEOPLE – COLLEGE EDUCATIONAL ATTAINMENT (2005-2009)

Nearly 36 percent of Williamson County residents over the age of 25 possess a 4-year college education, the second-highest level of college educational attainment within the CAPCOG region and approximately eight percentage points higher than the national average.



PEOPLE - EDUCATIONAL ATTAINMENT BY RACE (2005-2009)

Within Williamson County (and the CAPCOG region), there are striking differences in the educational attainment levels of individual racial and ethnic groups. While nearly 63 percent of Asian residents age 25 years and older within Williamson County possess a college degree, for example, the figure is just 17 percent for Hispanic residents. Given the growth trajectories of individual racial and ethnic groups, these differences have profound consequences for our region.

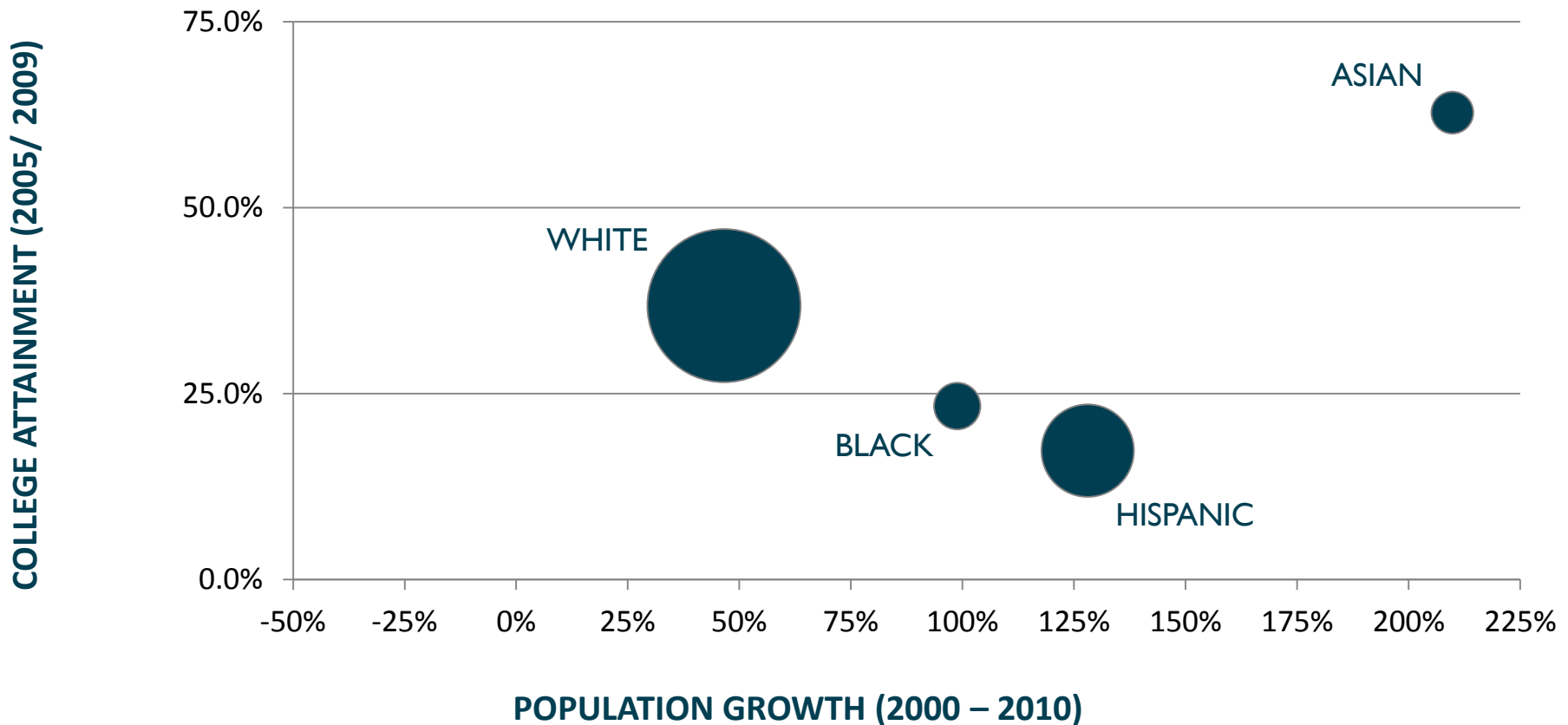


PEOPLE – EDUCATION & POPULATION GROWTH

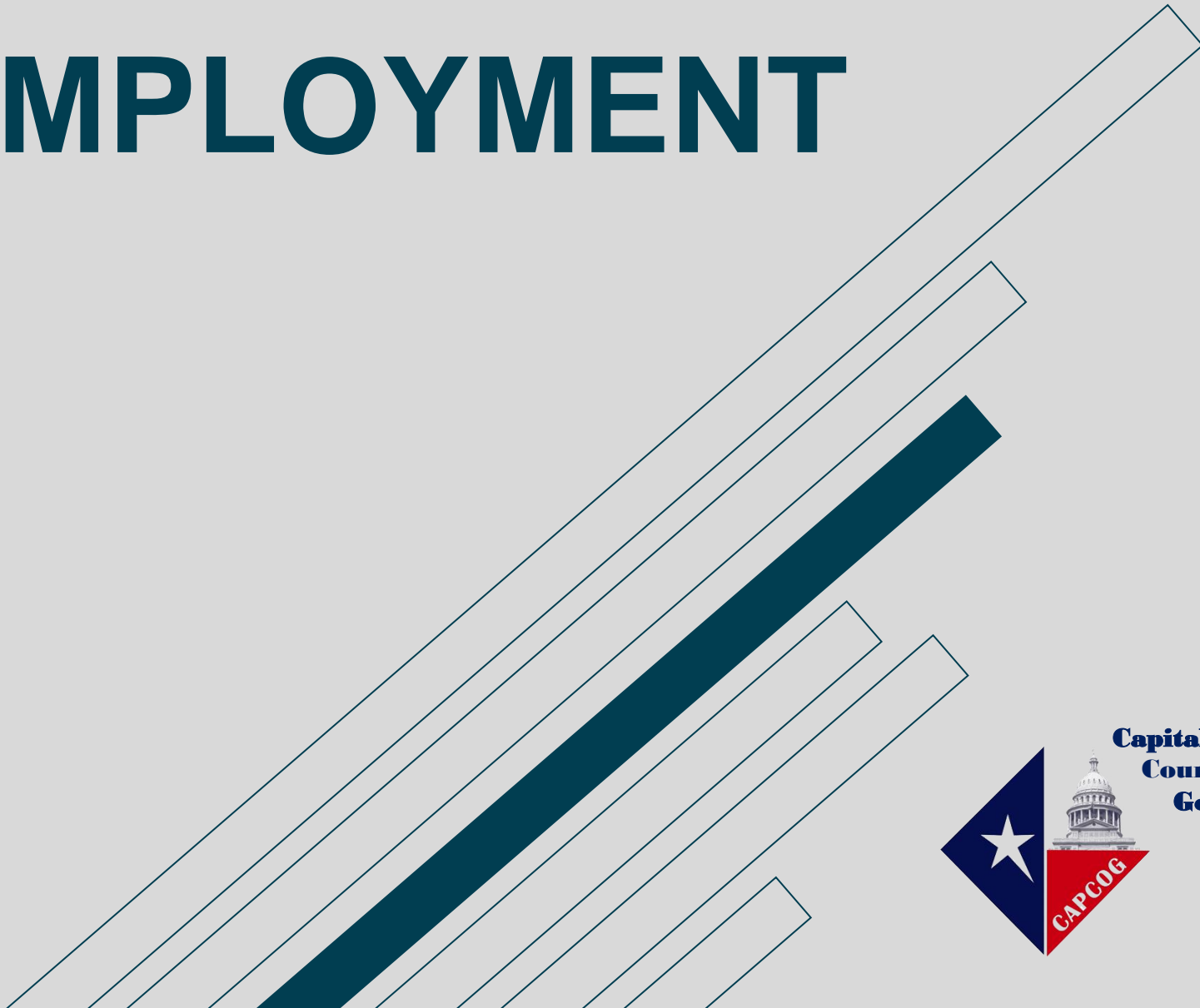
The growth dynamics of individual racial and ethnic groups—combined with wide discrepancies in the rate of college educational attainment—suggest that maintaining its current level of educational attainment may be difficult for Williamson County (as well as the rest of the CAPCOG region). Unless our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



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

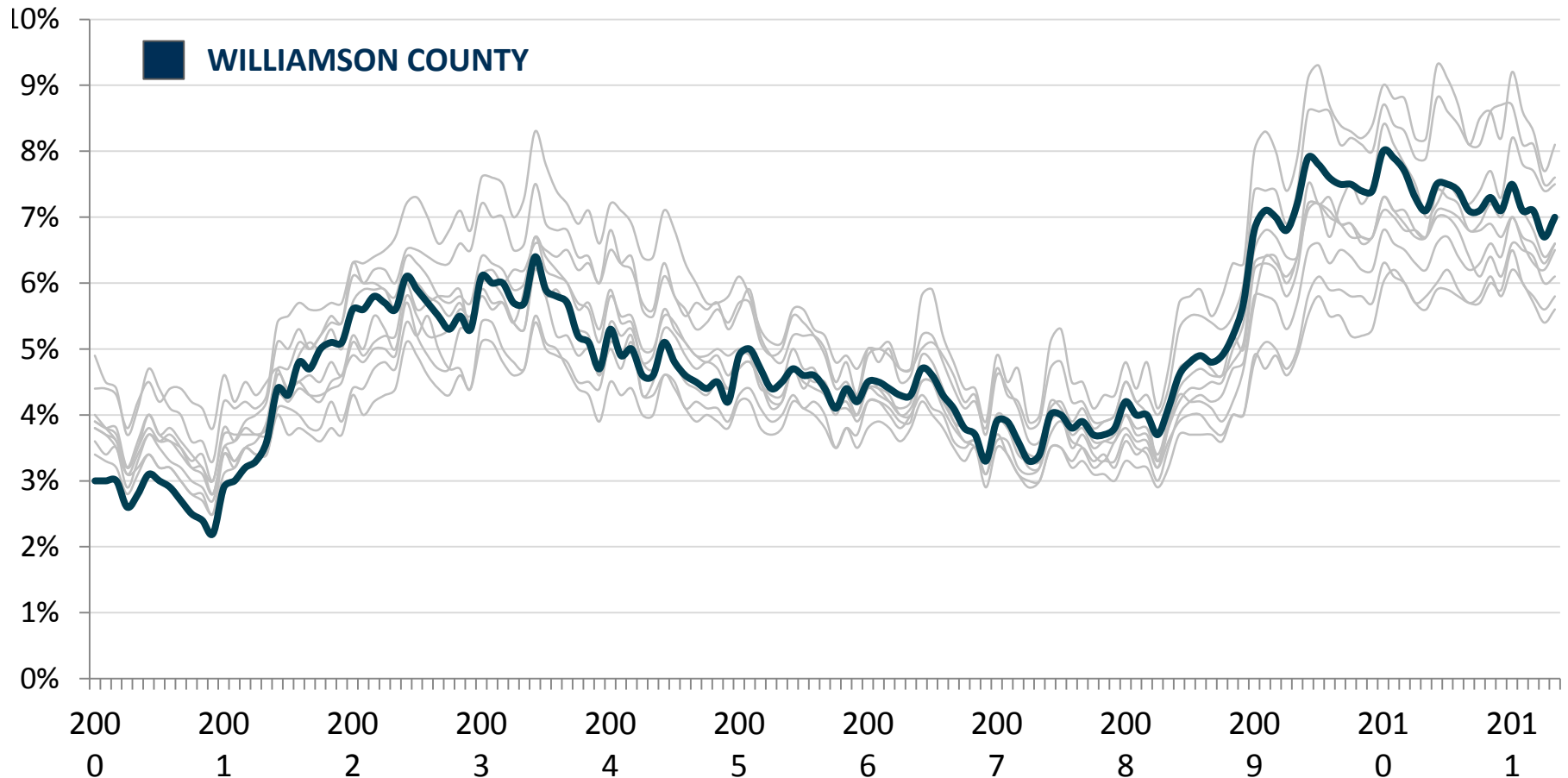
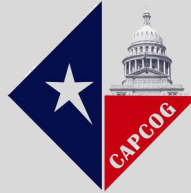


EMPLOYMENT



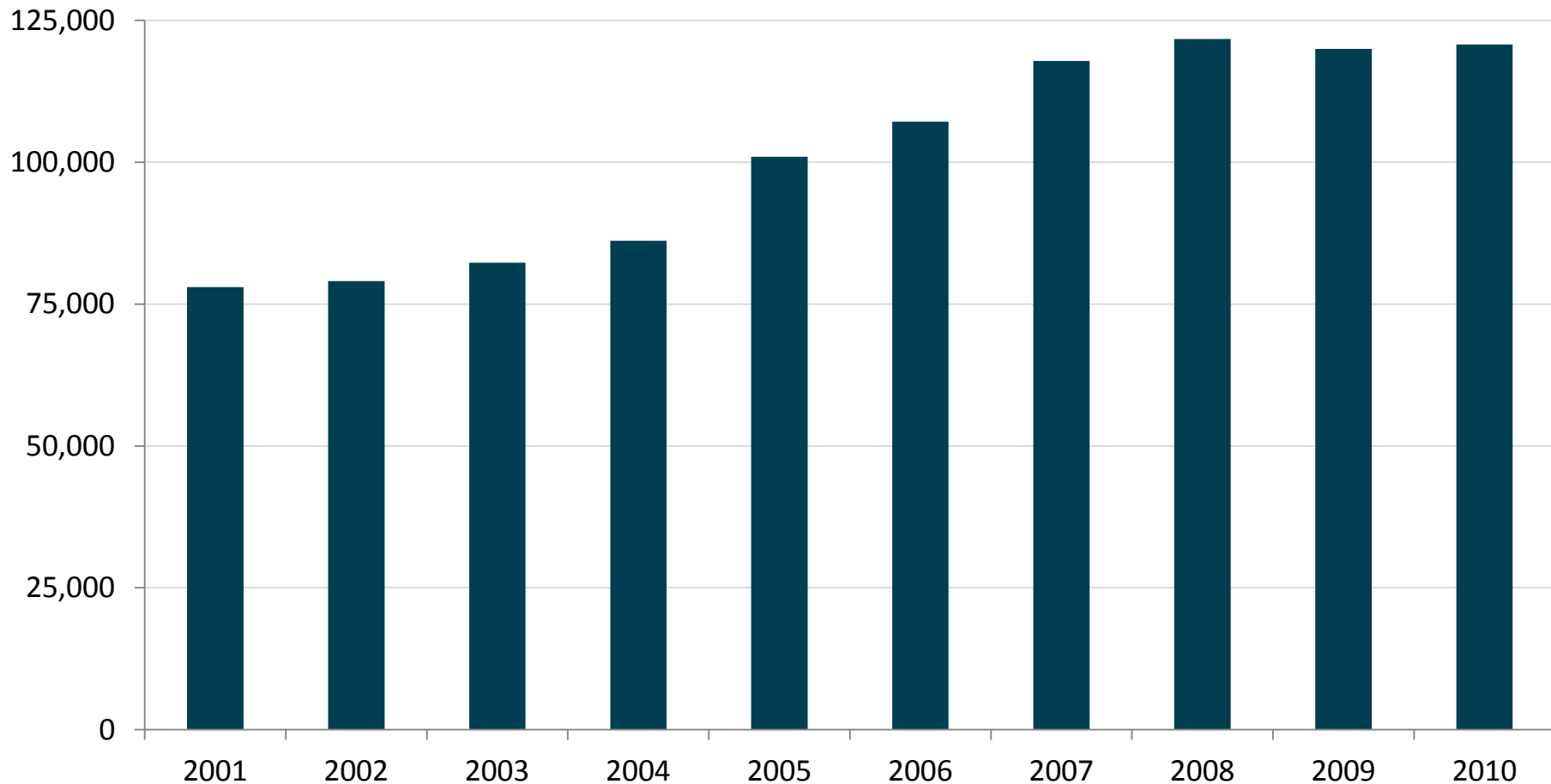
UNEMPLOYMENT – 2000 - 2010

During the past decade, the unemployment rate of Williamson County has proven relatively volatile. In 2000, for example, Williamson County's unemployment rate was a stunningly low 3 percent. During the onset of the 2009 recession, however, Williamson County suffered the third-highest unemployment rate in the CAPCOG region. Today, the unemployment rate in Williamson County is 7 percent, below the national average but slightly higher than the regional average.



EMPLOYMENT – 2001 - 2010

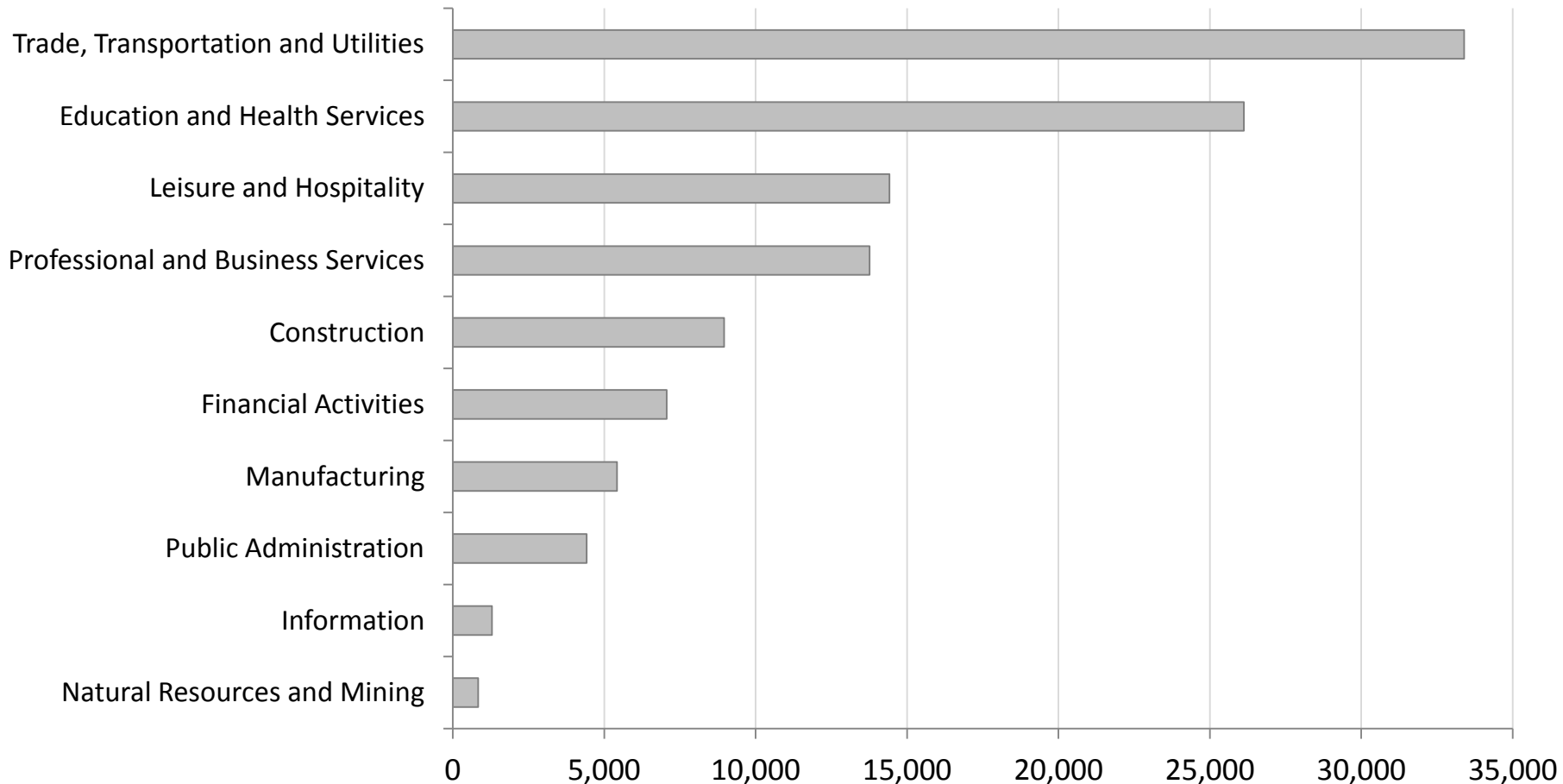
Since 2001, employment in Williamson County has grown from approximately 78,000 to more than 120,000—an increase of nearly 55 percent. In many regions within the country, employment levels today remain significantly below their pre-recession high. Williamson County, however, has recovered nearly all the jobs lost during the recession.



SOURCE: U.S. BUREAU OF LABOR STATISTICS

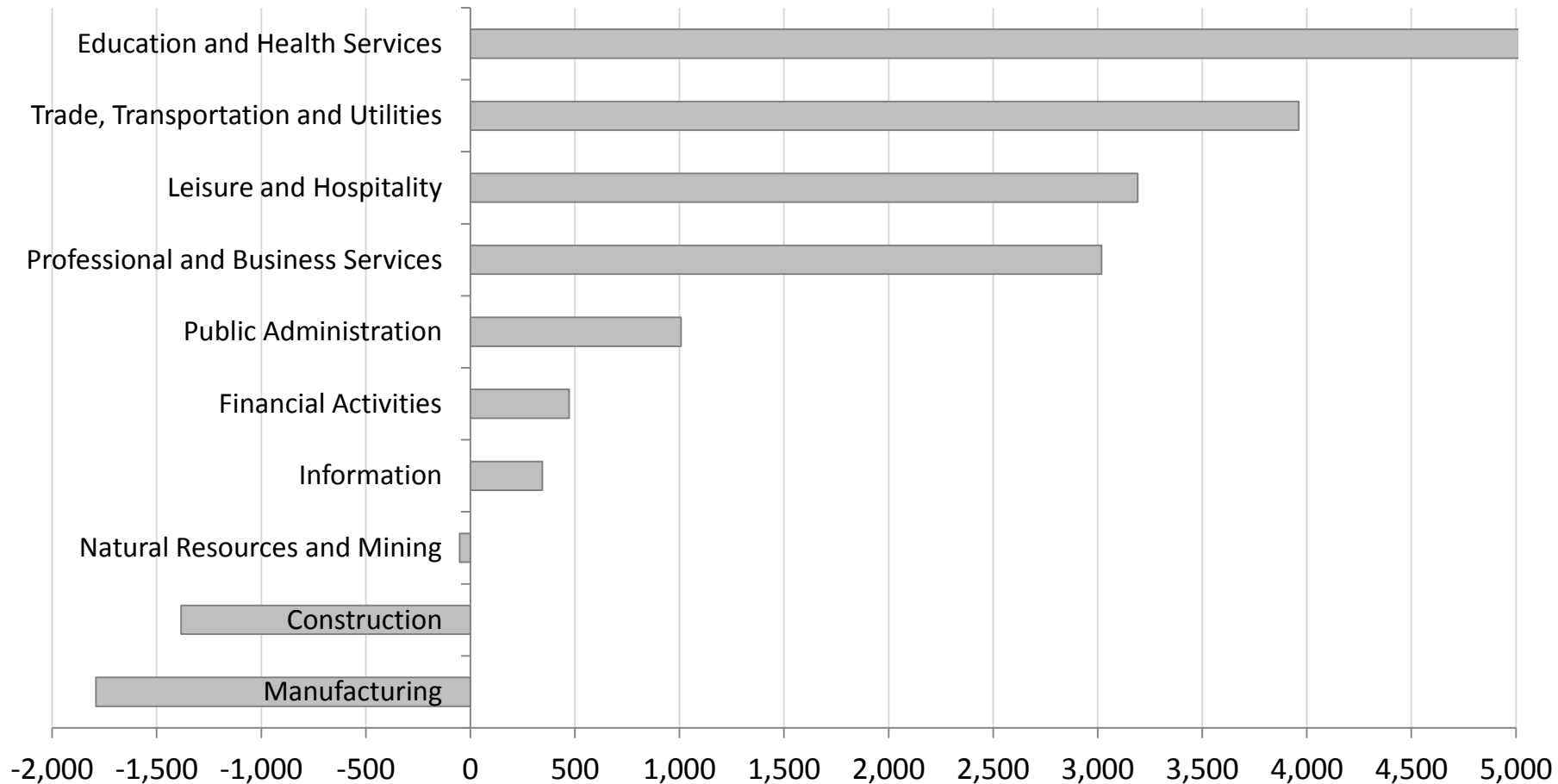
WILLIAMSON COUNTY EMPLOYMENT BY INDUSTRY (2010)

With more than 33,000 workers, Trade, Transportation & Utilities is the largest employment category within Williamson County. Education & Health Services, with approximately 26,000 workers, is the second-largest employment category. The third-largest employment category in Williamson County, Leisure & Hospitality, employs more than 14,000 workers.



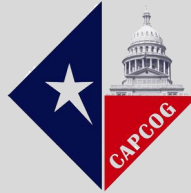
WILLIAMSON COUNTY EMPLOYMENT BY INDUSTRY (2006 – 2010)

During the past five years, the Education & Health services employment sector has added the greatest number of jobs within Williamson County. Trade, Transportation & Utilities added the second-greatest number of jobs during this period, with many of these jobs are in the retail trade subsector. The Leisure & Hospitality sector added the third-greatest number of jobs. Within the Leisure & Hospitality sector, many of the jobs created were in quick-service restaurants.



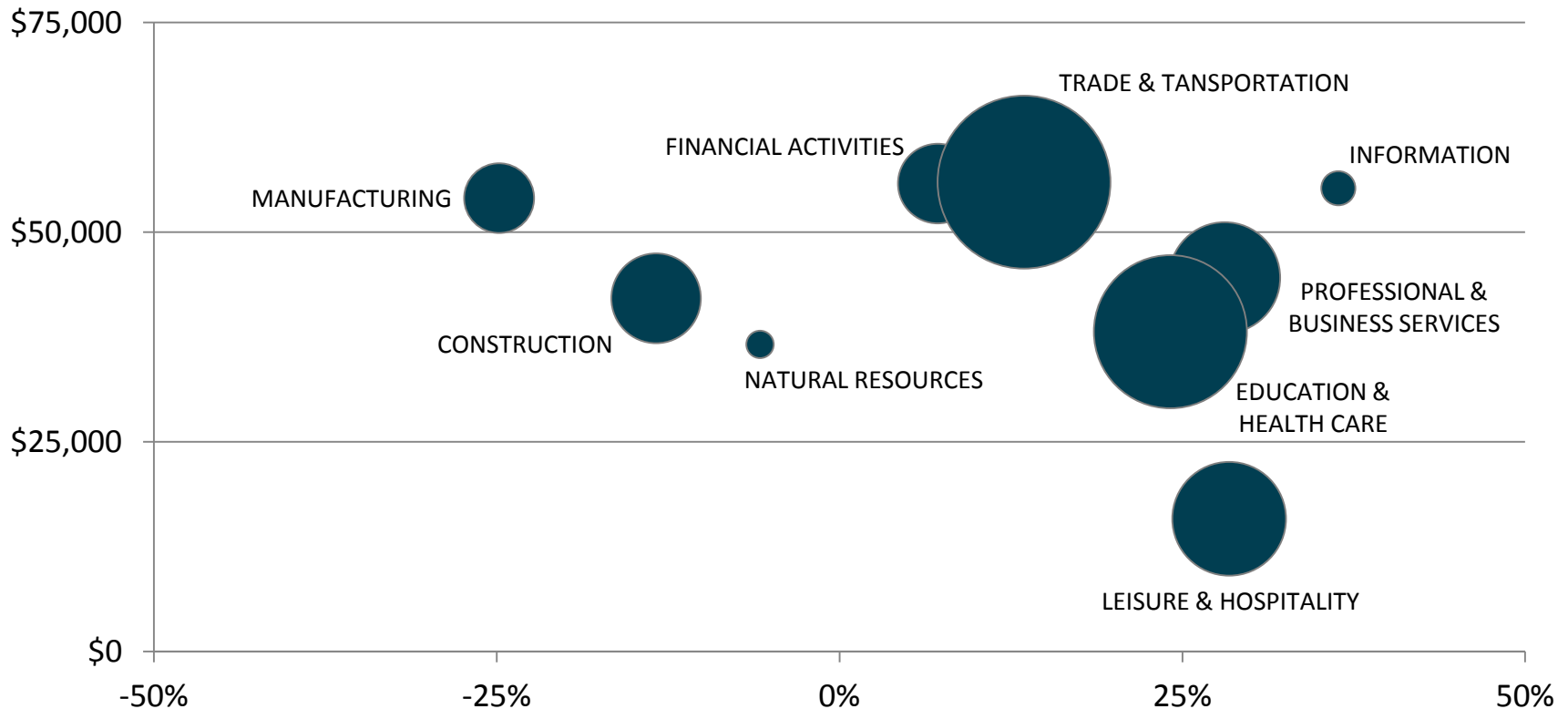
WILLIAMSON COUNTY DYNAMICS OF EMPLOYMENT GROWTH

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.

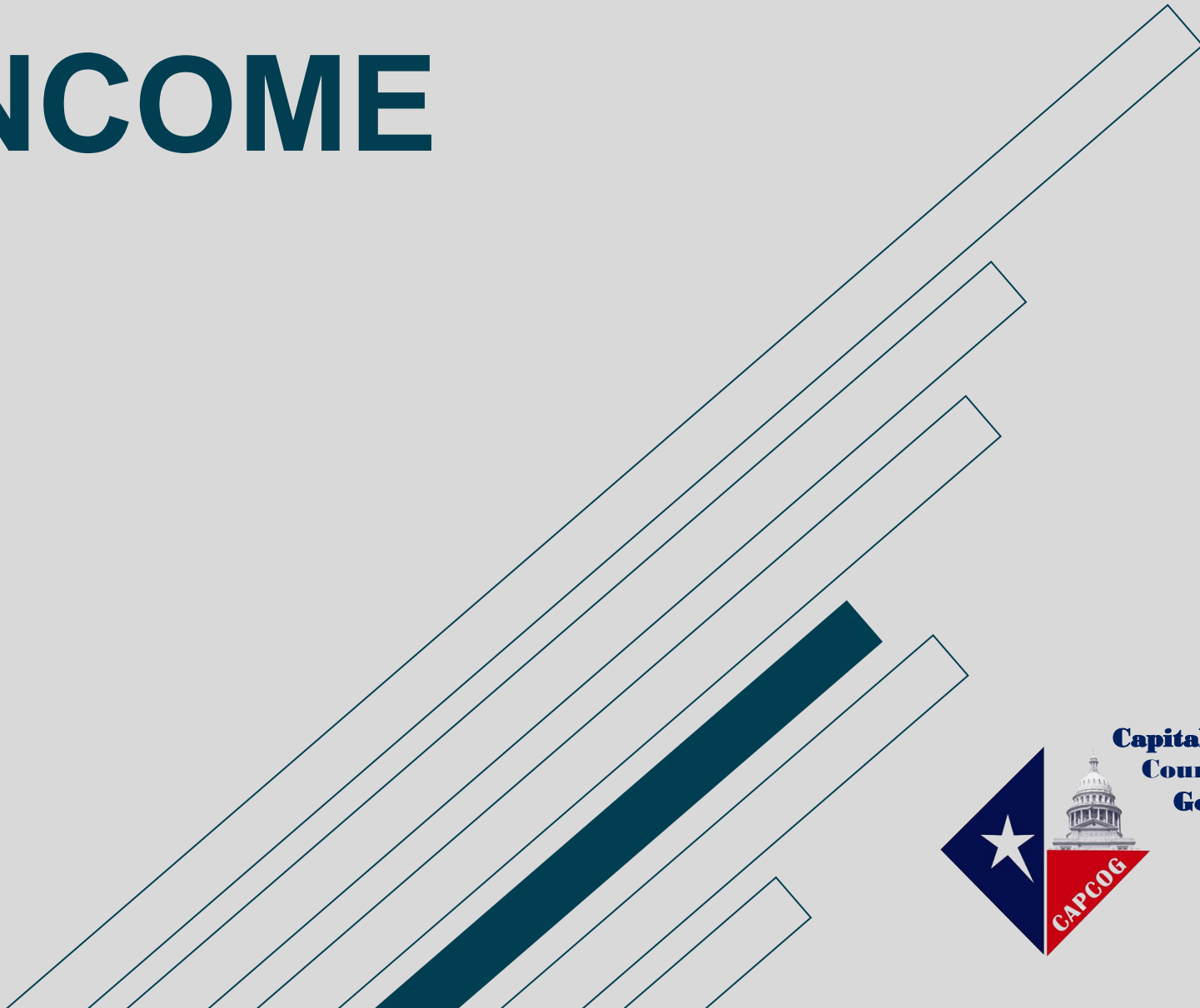


EMPLOYMENT GROWTH (2006 – 2010) VS. AVERAGE SALARY (2010) VS. EMPLOYMENT SIZE (2010)

WILLIAMSON COUNTY

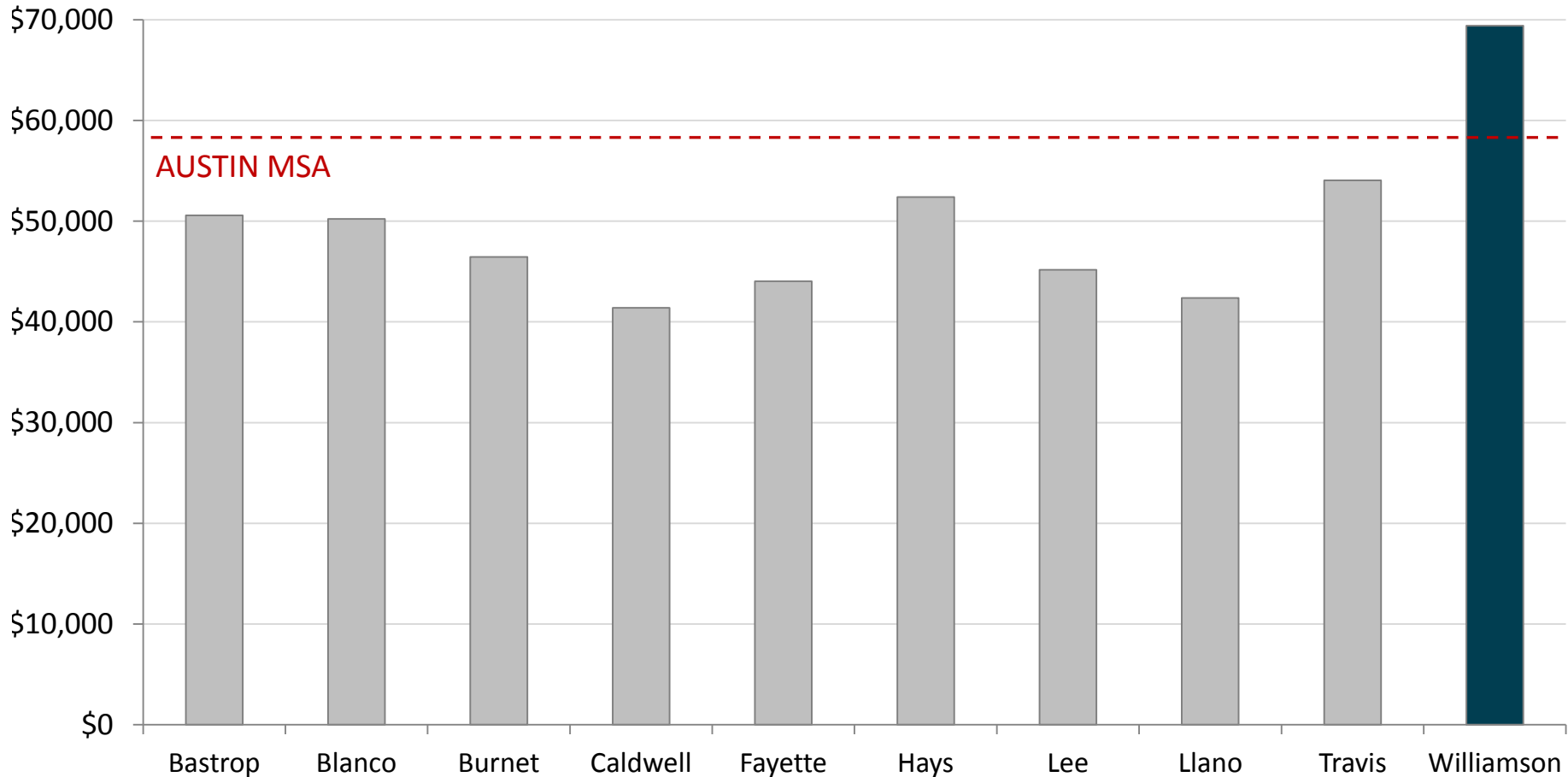


INCOME



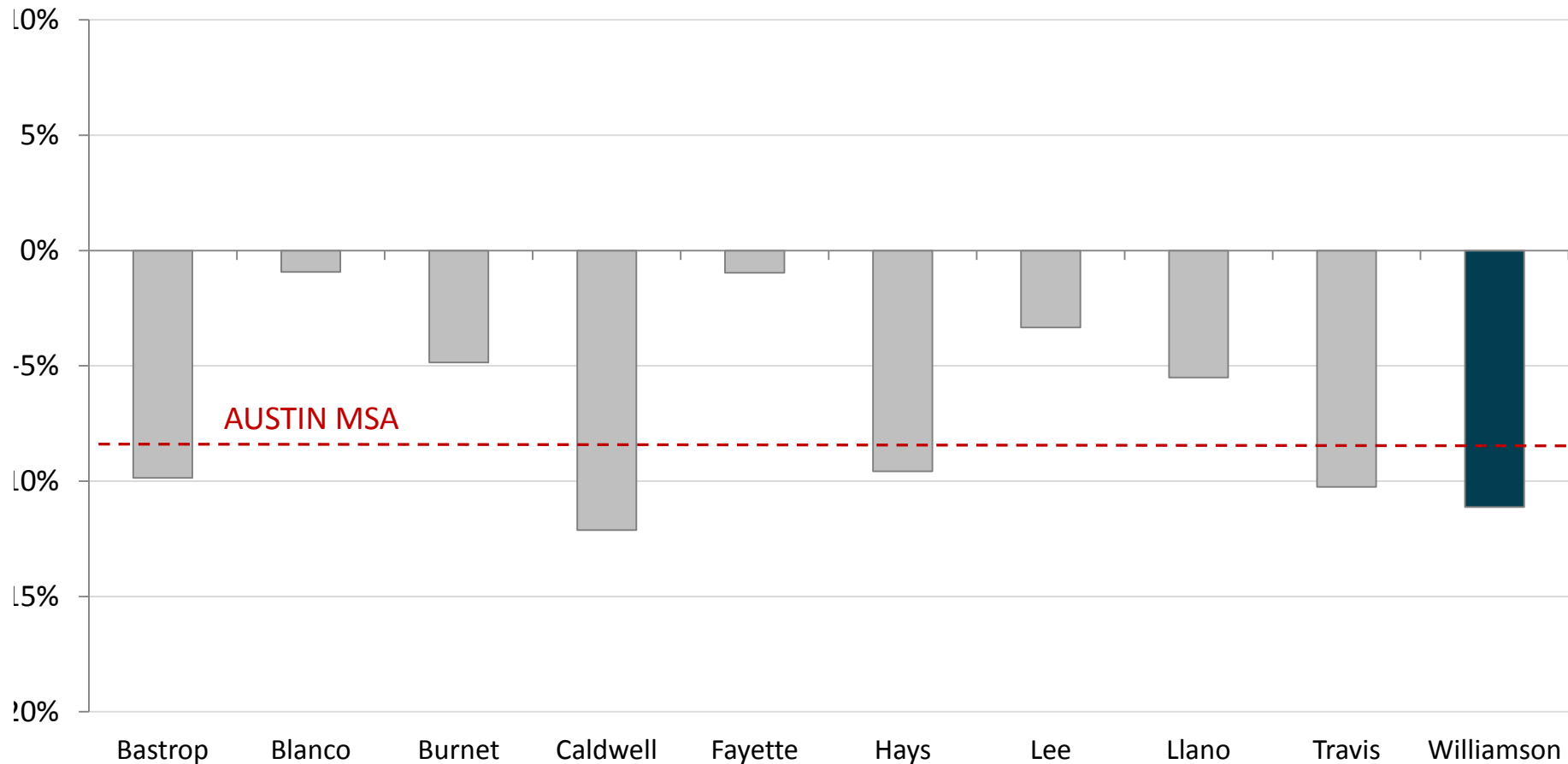
MEDIAN HOUSEHOLD INCOME (2005-2009)

Median household income in Williamson County is approximately \$69,500, the highest figure within the CAPCOG region. Median household income in Williamson County is more than \$15,000 higher than Travis County, which features the second-highest median household income within the CAPCOG region.



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 Williamson County and every county within the CAPCOG region. Between 2000 and 2009, median household income levels in Williamson County fell 11.1 percent (on an inflation-adjusted basis). During the past decade, Williamson County has suffered the most severe decline in household income within the CAPCOG region.

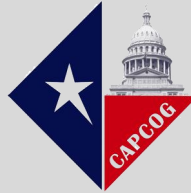


AFFORDABILITY

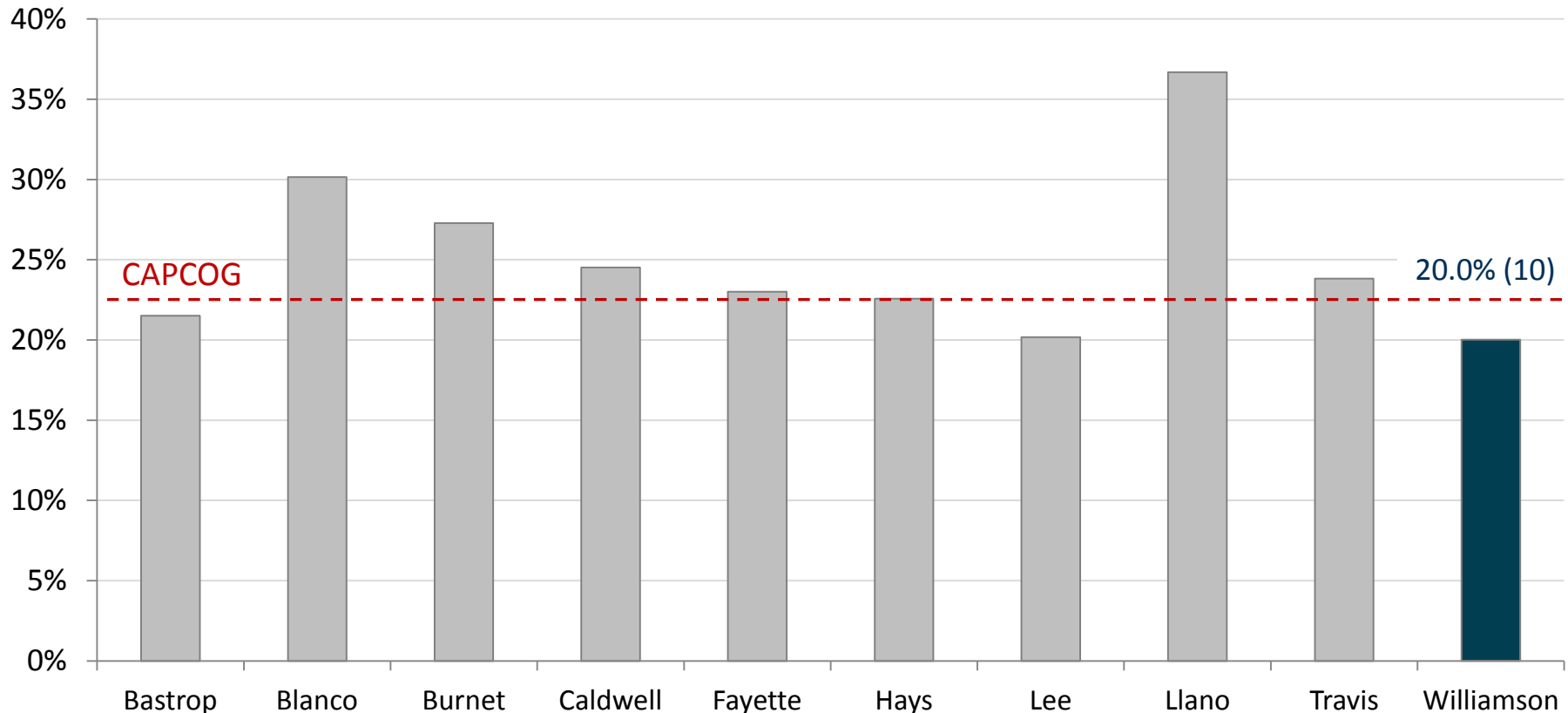


HOUSING AFFORDABILITY (2000)

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, 20 percent of homeowners in Williamson County with a mortgage spent more than 30 percent of their income on housing—the lowest proportion within the CAPCOG region.

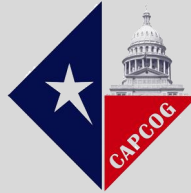


— PERCENTAGE OF HOMEOWNERS WITH A MORTGAGE THAT SPEND MORE THAN 30% OF INCOME ON HOUSING —

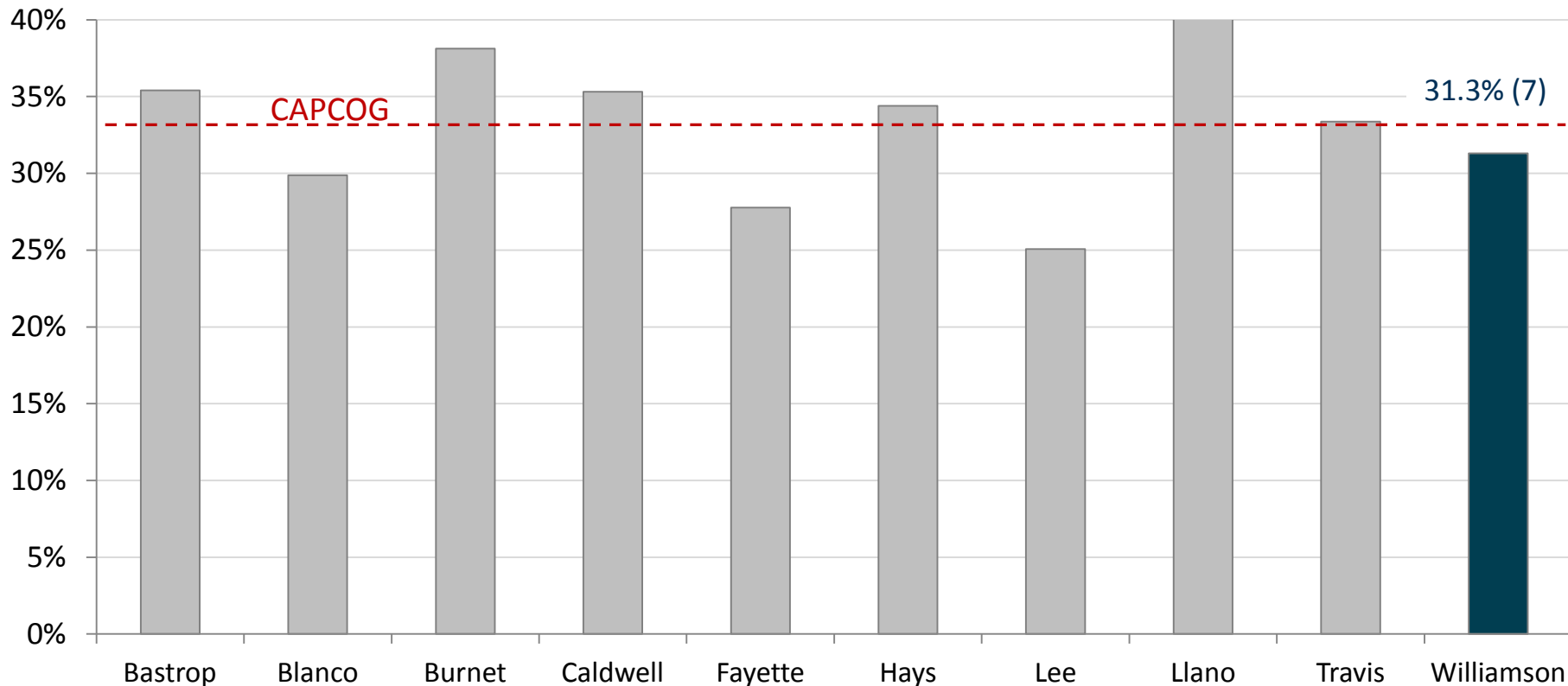


HOUSING AFFORDABILITY (2005-2009)

In 2005/09, the percentage of homeowners in Williamson County with a mortgage that spent more than 30 percent of their income on housing jumped to 31.3 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 —

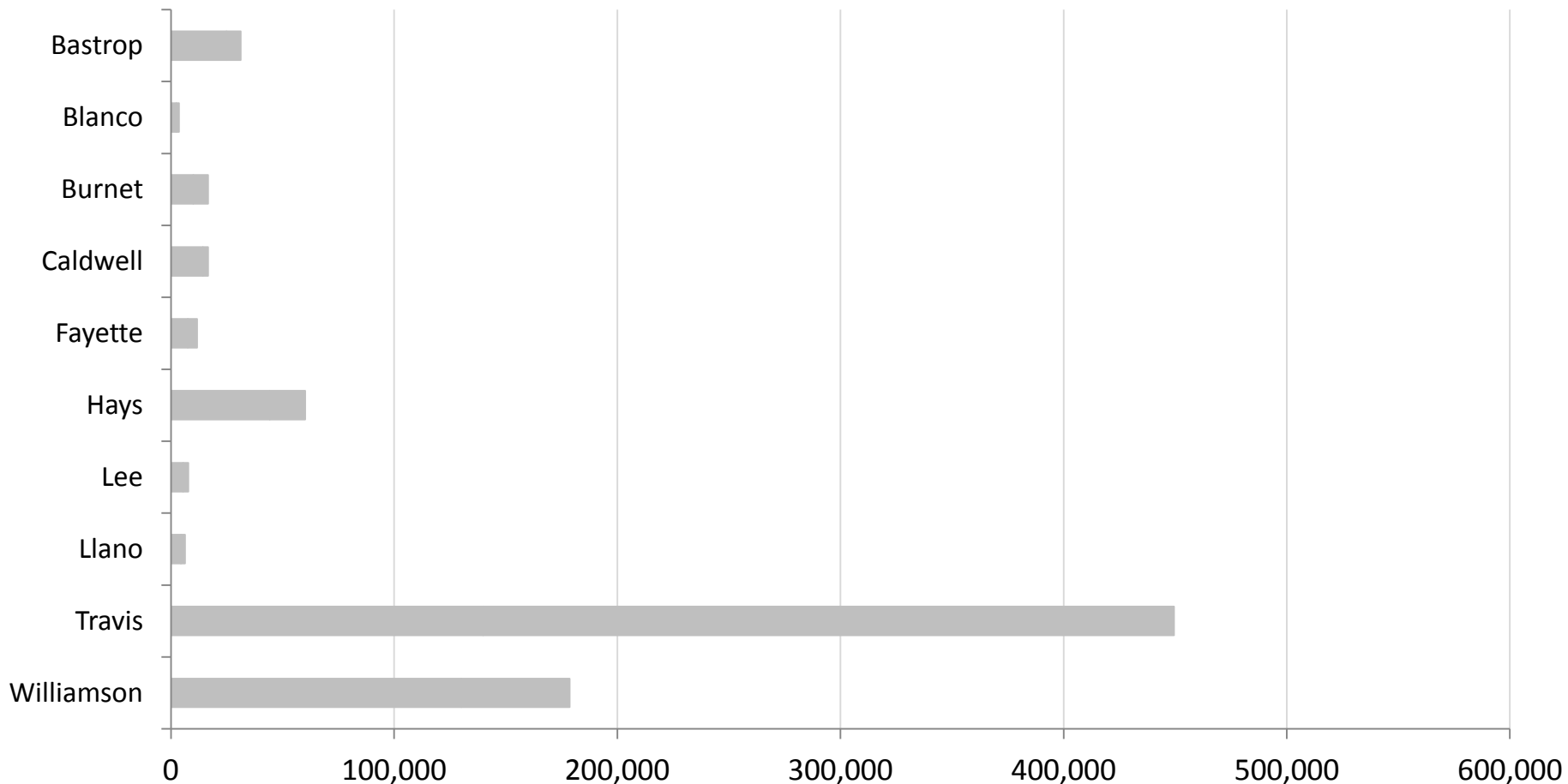


COMMUTING PATTERNS



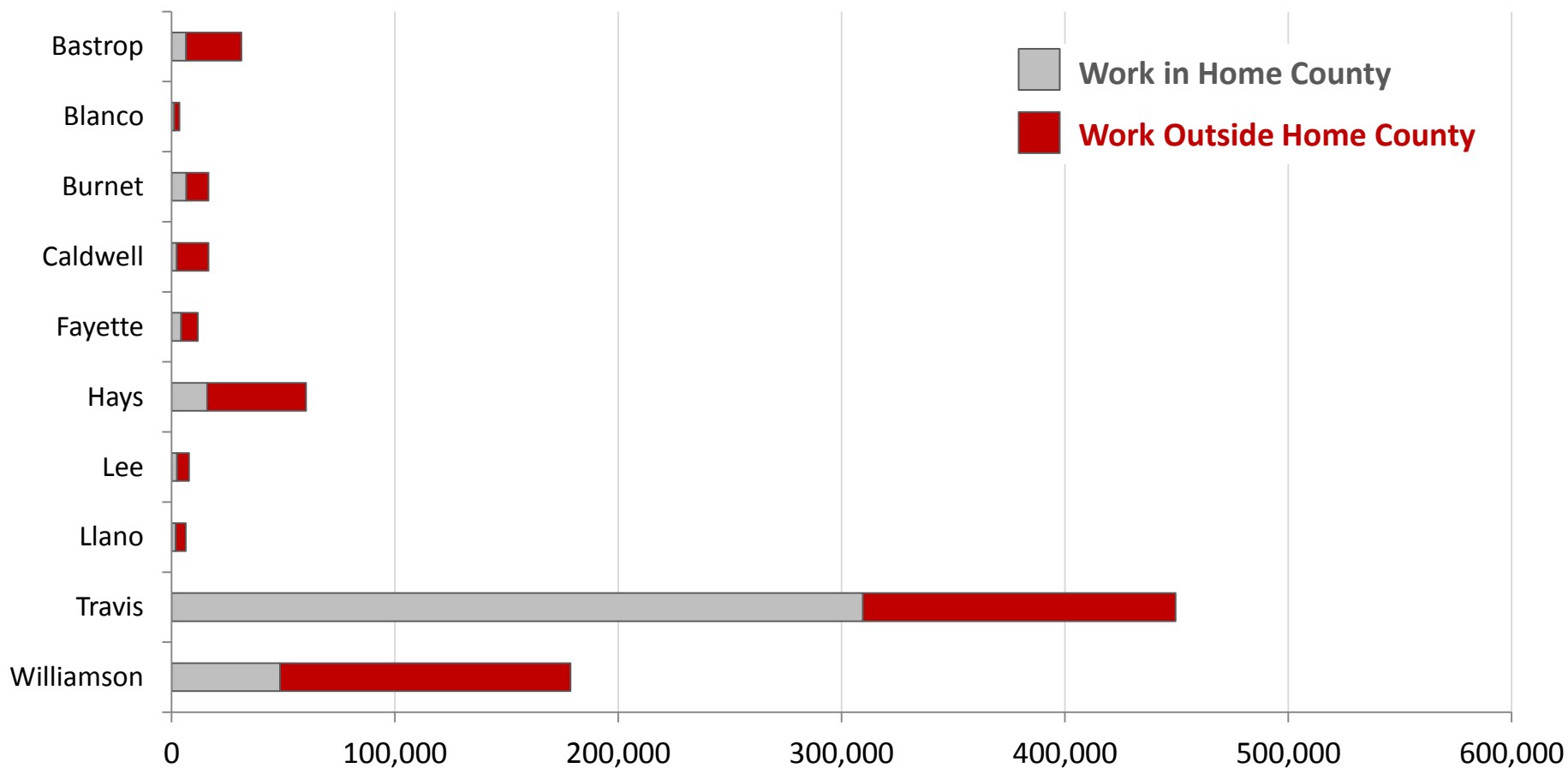
REGIONAL WORKFORCE – RESIDENT WORKERS BY COUNTY

With the exception of Travis County, every county within the CAPCOG region features more workers than jobs. The chart below shows the numbers of workers living in each county. In Williamson County, for example, there are more than 178,000 employed residents.



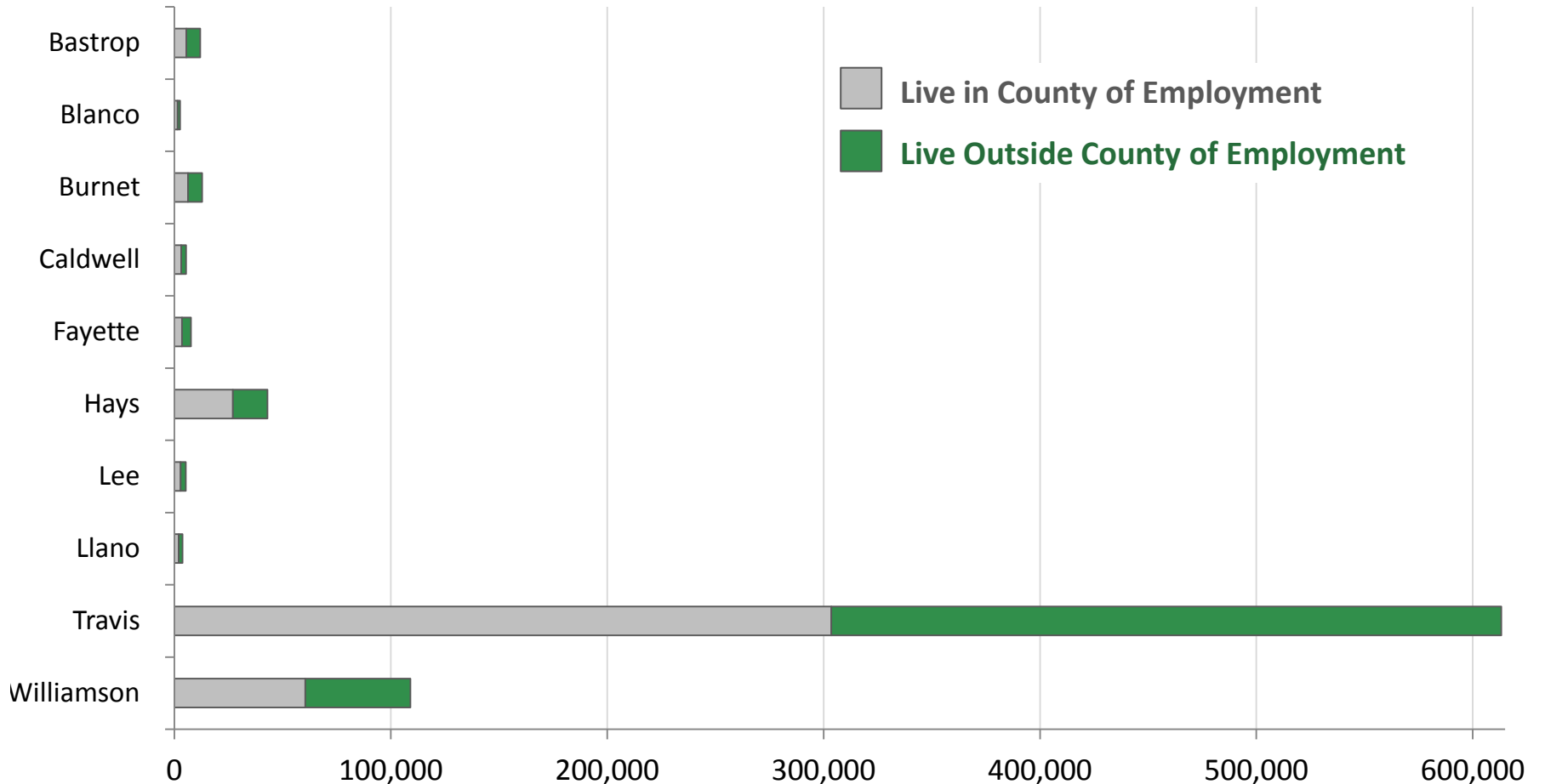
REGIONAL WORKFORCE – RESIDENTS BY PLACE OF WORK

The majority of workers living in Williamson County work in another county. For example, of the more than 178,000 workers living in Williamson County, more than 130,000 are employed elsewhere. The red portion of the bars below illustrates the proportion of the county's workers that commute to another county each day.



REGIONAL WORKFORCE – WORKERS BY PLACE OF RESIDENCE

Williamson County is also the place of employment for many workers who live elsewhere. More than 48,000 people commute to Williamson County but live elsewhere

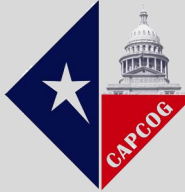


DAILY COMMUTING PATTERN BALANCE - WILLIAMSON COUNTY

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

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

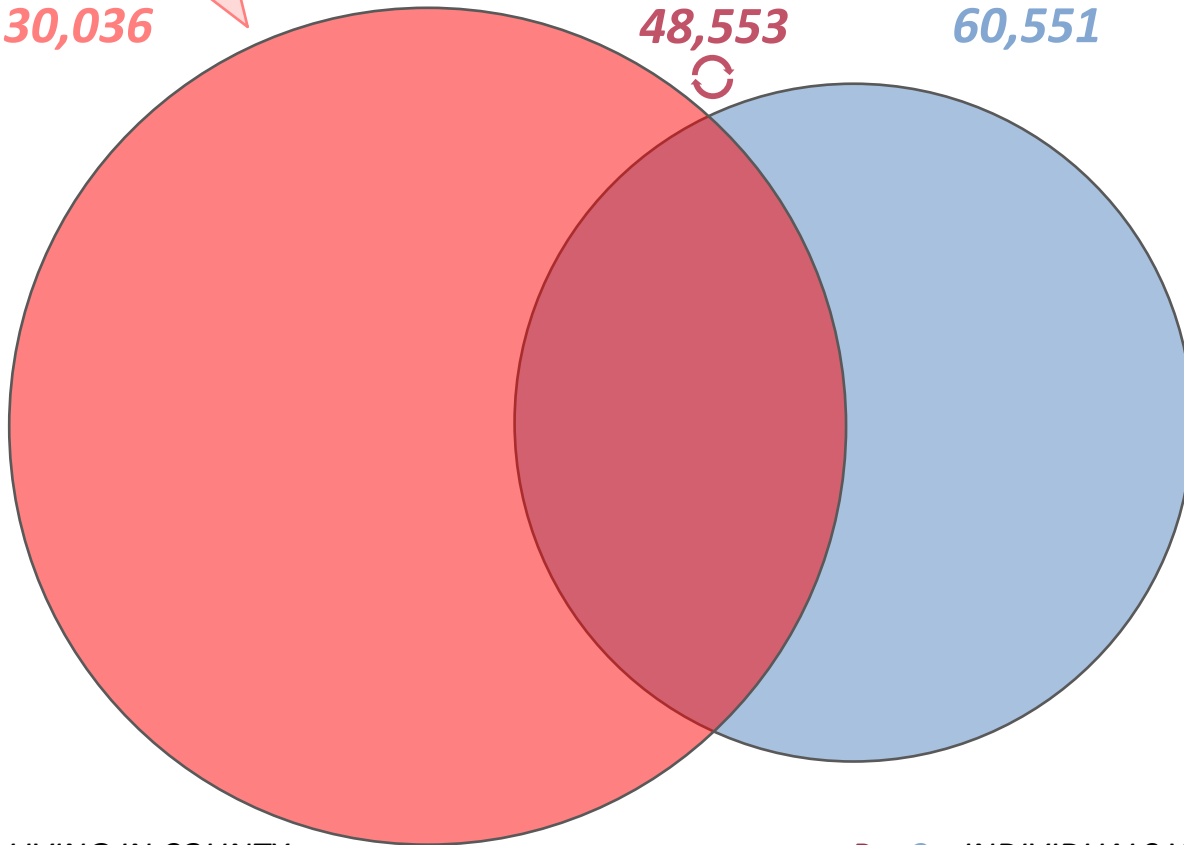
C The blue circle depicts outside workers who commute into Williamson County for work.



←
130,036

←
48,553
C

←
60,551

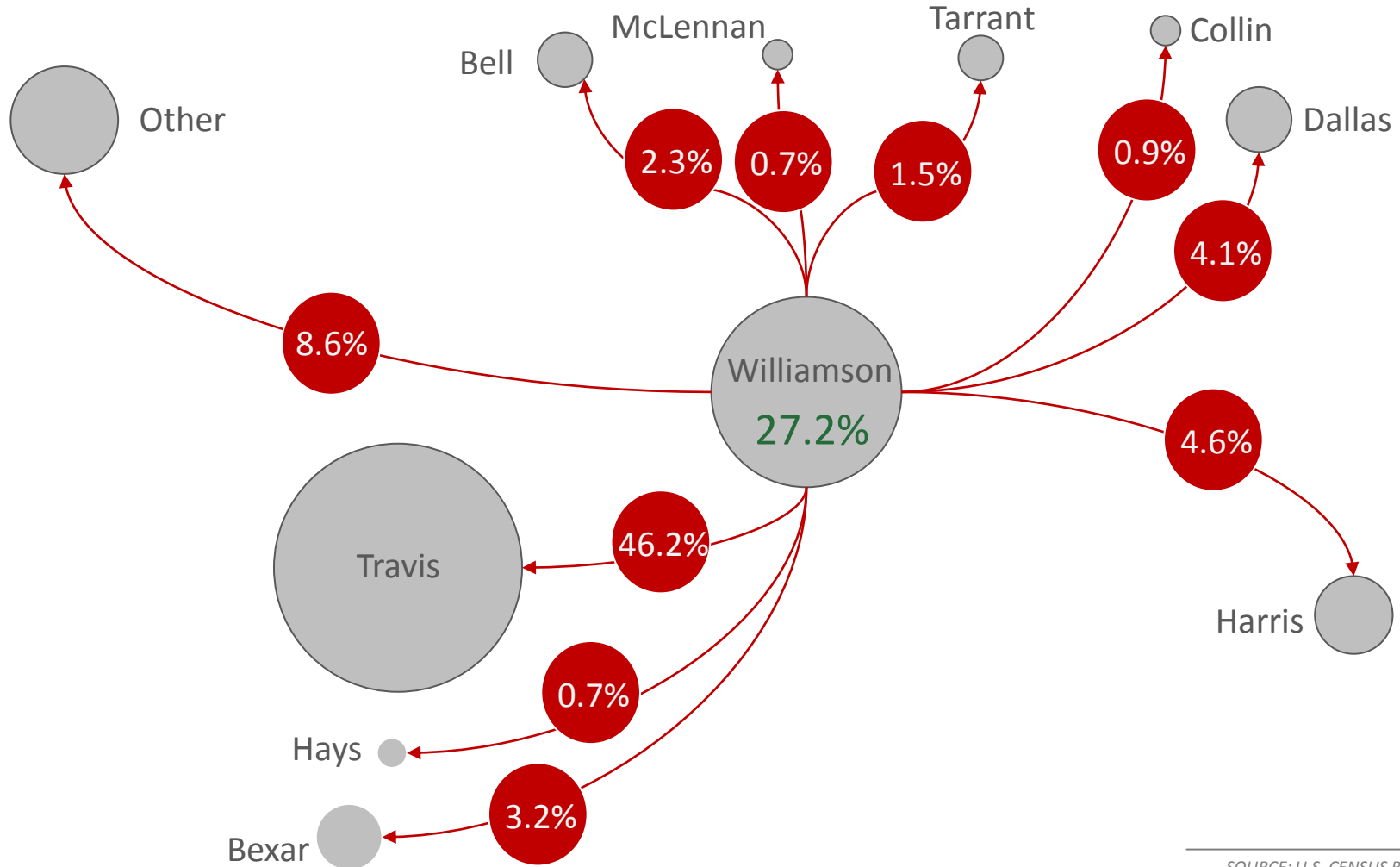
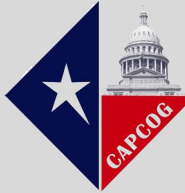


$A + B =$ WORKERS LIVING IN COUNTY

$B + C =$ INDIVIDUALS WORKING IN COUNTY

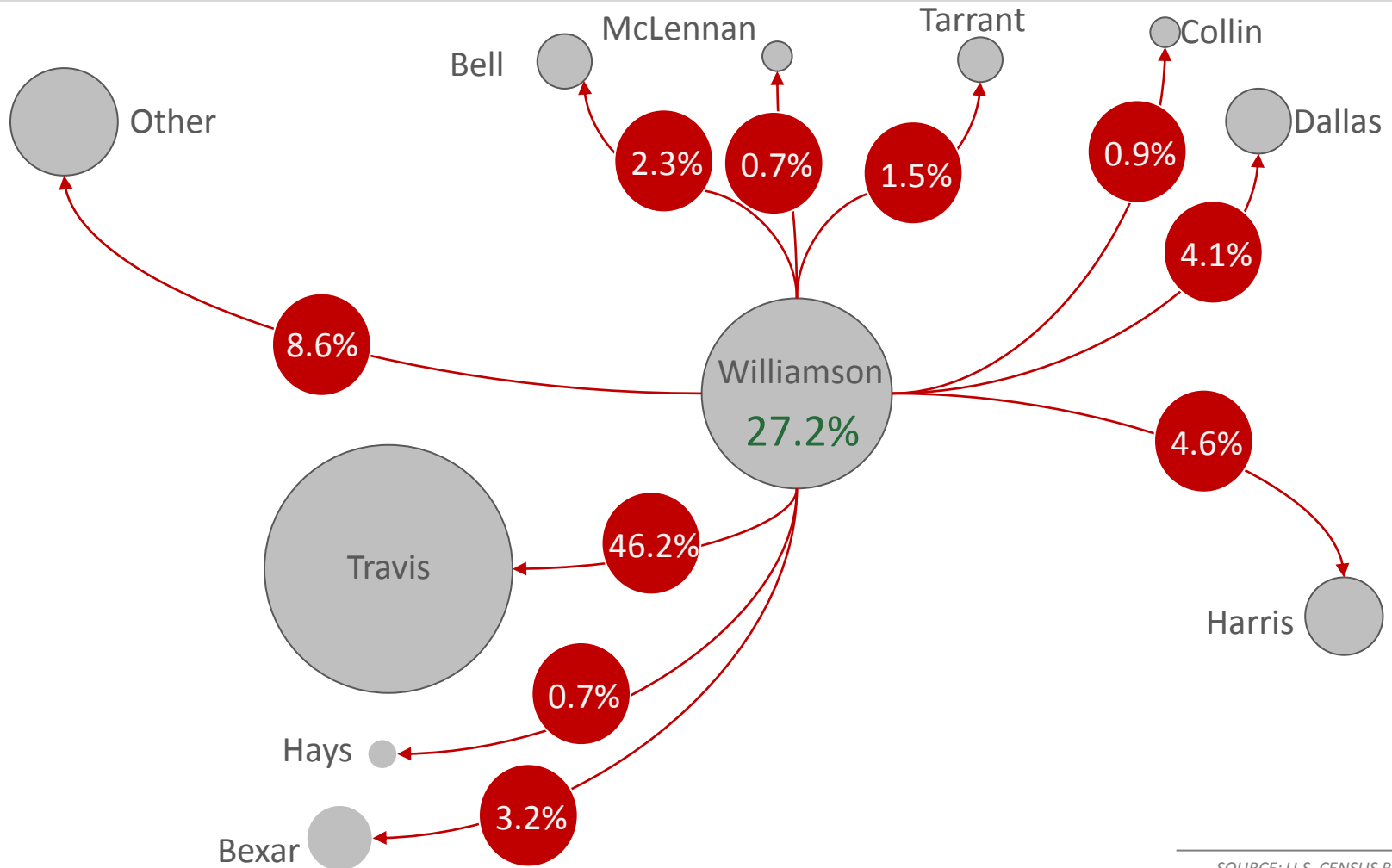
WILLIAMSON COUNTY – WHERE RESIDENTS WORK?

Nearly three-quarters of Williamson County residents commute to jobs outside of the county. Travis County is the largest recipient of Williamson County workers; nearly half of all Williamson County residents with a job are employed in Travis County.



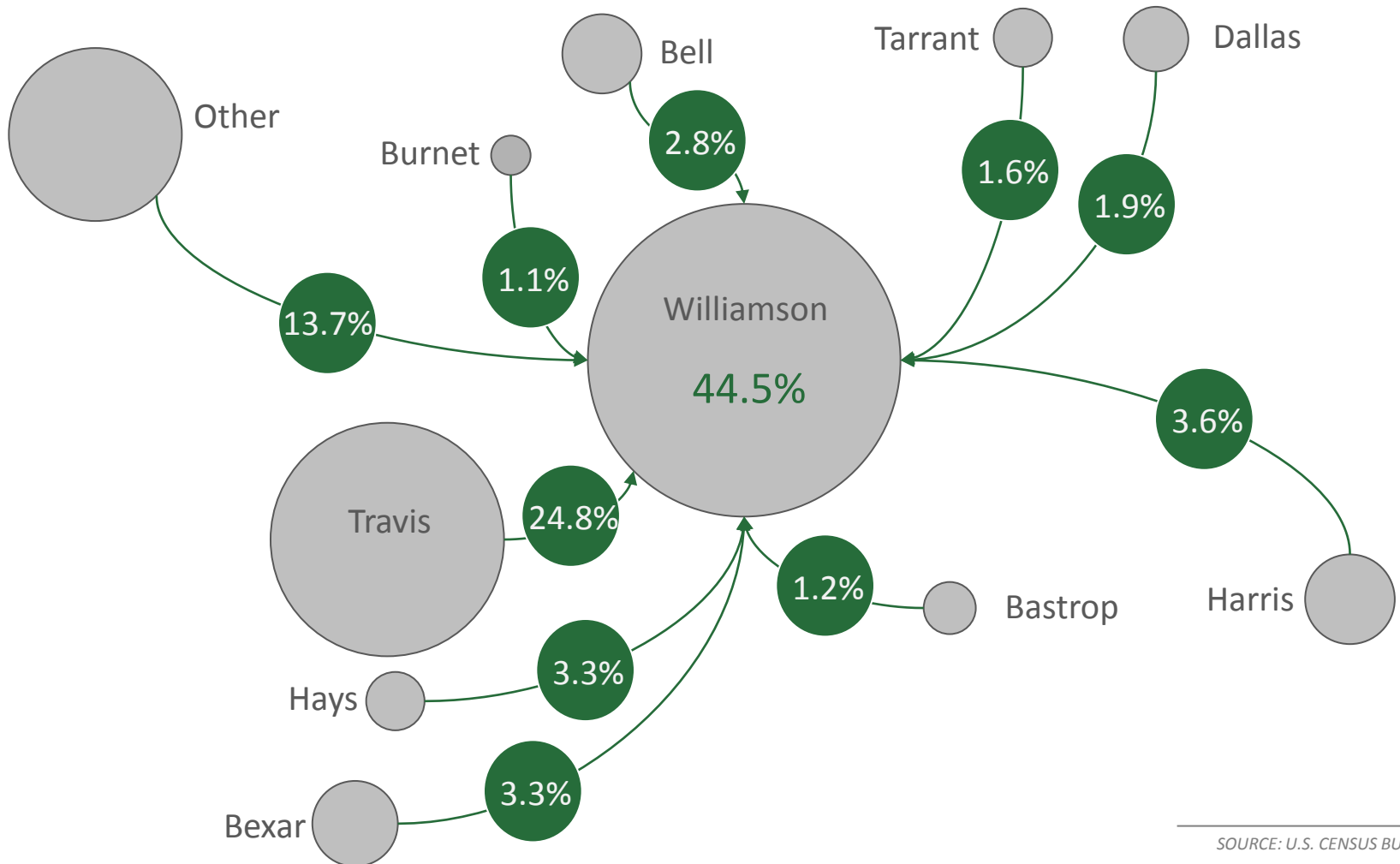
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WILLIAMSON COUNTY – WHERE DO WORKERS LIVE?

Just as many residents of Williamson County work in other jurisdictions, many outside residents are employed within Williamson County. Every day, more than half of all individuals working in Williamson County commute from another county. The top ten origins of worker in Williamson County residents are listed below. Travis County is the largest external source Williamson County workers; nearly 25 percent of workers in Williamson County live in Travis County.



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