<table>
<thead>
<tr>
<th></th>
<th>AGENDA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I</strong></td>
<td>REVIEW OUTCOMES OF S/C MEETING #3 INCLUDING Q&amp;A</td>
</tr>
<tr>
<td><strong>II</strong></td>
<td>EDUCATION: ECONOMIC DEVELOPMENT</td>
</tr>
<tr>
<td></td>
<td>DEMOGRAPHIC FINDINGS</td>
</tr>
<tr>
<td></td>
<td>SUBAREA PROFILES</td>
</tr>
<tr>
<td></td>
<td>PUBLIC MEETING #1</td>
</tr>
<tr>
<td></td>
<td>PUBLIC COMMENT</td>
</tr>
<tr>
<td></td>
<td>NEXT MEETING DATE/TIME/AGENDA</td>
</tr>
</tbody>
</table>
Part I
PROJECT ADMINISTRATION
S/C MEETING #3 TAKEAWAYS

• Provide current meeting agenda in paper form for the S/C for note taking purposes
• All figures and data presented must have a clear purpose and meaning
• Housing market accessibility important for workforce
Part II
EDUCATION

Economic Development
PURPOSE

• Discuss findings of recently completed Target Industry and Workforce, Retail and Recruitment studies.

• Understand relationship to Housing Element/Toolkit, Growth Scenarios and Future Land Use Map tasks of the 2030 Update.
Part III
WORK SESSION

Session IV – Demographics and Subarea Profiles
DEMOGRAPHIC FINDINGS
CONSIDERATIONS

Housing
A growing economy and population require a wide range of housing choices with regards to location, price, density, and type.

City Services
Understanding population trends is critical to providing the right services and maintaining (or enhancing) the existing level of service.

Healthcare
Access to medical offices, hospitals, and healthy food are important considerations of growing and changing communities.

Amenities and Services
Amenities and services play three key roles: they provide citizens with commodities, provide employment opportunities, and improve the quality of life by providing retail and entertainment for residents of all ages.

Connectivity
Whether for exercise or as a form of transportation, it is important that cities be well connected.

Employment
A community with a growing economy and population must provide a wide range of employment opportunities for part-time employees, young professionals, and prime career adults.
Understanding population growth is critical to making informed land use decisions and maintaining the City’s level of service to residents as the community grows.

Source: U.S. Census Bureau, Decennial Census
Georgetown is experiencing the same pressures from growth as the region; competition for jobs, housing and transportation. Will those trends continue into the future and can Georgetown become more competitive through innovation in economic development and housing?

Source: U.S. Census Bureau, 2016 ACS
Median age is rising and exceeds region. Age may have an affect on housing choice, employment and need for services.

Source: U.S. Census Bureau, 2016 ACS
Georgetown has a higher percentage of persons with disabilities than the region which should inform how people access services and housing choice.

Source: U.S. Census Bureau, 2016 ACS
Georgetown has a higher percentage of uninsured children under 18 than the region.
AGE AND SEX

Source: U.S. Census Bureau, 2016 ACS
RACE AND ETHNICITY

Nearly 7% of the City’s population speaks English less than “very well”

**Race**

- **Georgetown**
  - White: 92.3%
  - Black or African American: 1.4%
  - American Indian and Alaska Native: 1.0%
  - Asian: 2.1%
  - Native Hawaiian and Other Pacific Islander: 0.0%
  - Some other race: 0.0%

- **Williamson County**
  - White: 81.6%
  - Black or African American: 3.5%
  - American Indian and Alaska Native: 0.3%
  - Asian: 0.3%
  - Native Hawaiian and Other Pacific Islander: 0.0%
  - Some other race: 6.3%

- **Austin-Round Rock**
  - White: 78.7%
  - Black or African American: 7.3%
  - American Indian and Alaska Native: 0.4%
  - Asian: 5.3%
  - Native Hawaiian and Other Pacific Islander: 0.1%
  - Some other race: 3.2%

**Ethnicity**

- **Georgetown**
  - Not Hispanic or Latino: 79%
  - Hispanic or Latino: 21%

- **Williamson County**
  - Not Hispanic or Latino: 76%
  - Hispanic or Latino: 24%

- **Austin-Round Rock MSA**
  - Not Hispanic or Latino: 68%
  - Hispanic or Latino: 32%

Source: U.S. Census Bureau, 2016 ACS
EDUCATION

Source: U.S. Census Bureau, 2016 ACS

GISD Projected Growth

+2,300 Students in the next 5 years

16,900+ Projected enrollment in 10 years
## Industry and Occupation

### Industry

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, ...</td>
<td>0%</td>
</tr>
<tr>
<td>Construction</td>
<td>10%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>20%</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>20%</td>
</tr>
<tr>
<td>Retail trade</td>
<td>30%</td>
</tr>
<tr>
<td>Transportation,...</td>
<td></td>
</tr>
<tr>
<td>Information</td>
<td></td>
</tr>
<tr>
<td>Finance,...</td>
<td></td>
</tr>
<tr>
<td>Professional,...</td>
<td></td>
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<tr>
<td>Educational,...</td>
<td></td>
</tr>
<tr>
<td>Arts,...</td>
<td></td>
</tr>
<tr>
<td>Public,...</td>
<td></td>
</tr>
<tr>
<td>Other services,...</td>
<td></td>
</tr>
</tbody>
</table>

### Occupation

- **Management, business, science, and arts occupations**: 43%
- **Sales and office occupations**: 23%
- **Service occupations**: 19%
- **Production, transportation, and material moving occupations**: 8%
- **Natural resources, construction, and maintenance occupations**: 7%

---

Georgetown  Williamson Co.
Employment is an important factor because it provides insight into the strength of the job market, which is tied to the community’s ability to attract employers and create hubs of industries.

EMPLOYMENT RATES

Employment 2011-2016: +20.7%
Unemployment 2017: 3.9%

Source: U.S. Census Bureau, 2016 ACS
Applied to housing, this trend could indicate demand for smaller units (e.g., studios or one bedrooms) or diversified housing types (e.g., patio homes or townhomes). Household size also informs Fiscal Impact Model and population estimates.

<table>
<thead>
<tr>
<th></th>
<th>Average Household Size</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Georgetown</td>
</tr>
<tr>
<td>Owner-Occupied</td>
<td>2.46</td>
</tr>
<tr>
<td>Renter-Occupied</td>
<td>2.45</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau, 2016 ACS
MEDIAN HOUSEHOLD INCOME

- Georgetown: $64,256
- Williamson County: $75,935
- Austin-Round Rock MSA: $66,093

Householders under 25:
- $60,000 to $100,000: 27.6%
- Over $100,000: 0.0%

Householders 25 to 44:
- $60,000 to $100,000: 18.6%
- Over $100,000: 46.0%

Householders 45 to 64:
- $60,000 to $100,000: 27.9%
- Over $100,000: 45.6%

Householders 65 and older:
- $60,000 to $100,000: 24.7%
- Over $100,000: 19.1%
FINDINGS

• Both Georgetown and Williamson County have a relatively low base population of children, though the County’s distribution within this group is greater.

• Both Williamson County and Georgetown have a shortage of college-age adolescents and young professionals relative to the regions share.

• Georgetown has a lower distribution of prime workforce adults, which correlates to the City’s lower distribution of children. In addition to adequate and desirable housing for families, prime workforce adults are attracted by availability of high-paying jobs.

• Georgetown has a high distribution of retirees and adults approaching retirement. A key element of the housing element will be to identify if the City has sufficient housing for this group, from active living seniors to those in assisted living.
PURPOSE OF SUBAREA PROFILES

• Basis for making policy recommendations by understanding:
  • Housing diversity (type, lot size)
  • Housing choice (square footage, price point)
  • Historic trends (2008-2018)
  • Existing affordable housing stock (market rate and subsidized)
• Housing considerations
  1. Housing age
  2. Housing type / density
  3. Housing value

• Other considerations
  • Sun City (age-restricted)
  • Old Town / Downtown overlays
  • Census Block Group boundaries
  • Elementary school zones (limited impact)

• Not meant to define “neighborhoods”
CONSULTANT OBSERVATIONS

• Rental demand bifurcated for MF properties
  • Affordable end – strong demand, limited supply
    • Duplex and four-plex market (large inventory) important part of naturally occurring affordable housing
    • High end (most newer apartments) – supply ahead of demand at current time
  • MLS sales data very informative

• Entry level home buyers have more options in new communities east of I-35 for modern new homes in the $200,000s
CONSULTANT TAKEAWAYS

• Neighborhood Condition
  • areas most at risk are the conventional 1960s-80s
  • large-lot neighborhoods west of I-35 more at risk of tear-down redevelopment with mini-mansions
  • didn’t see any signs that neighborhoods were headed toward massive disinvestment, wealth flight, and poverty in the near future
• Pre-World War II homes in Subarea 1 are in good condition
  • high value per square feet
• Maps

• Demographics
  • Population
  • Households

• Housing Supply Profile and Trends
  • Housing Inventory Summary
  • Multifamily Apartments
  • Single Family
# PLANNING AREA HOUSING DATA

## Housing Inventory Summary

### Planning Area Housing Type - WCAD

<table>
<thead>
<tr>
<th>Subarea</th>
<th>Combined</th>
<th>Count</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Units</td>
<td></td>
<td>33,842</td>
<td></td>
</tr>
<tr>
<td>Condominium</td>
<td></td>
<td>78</td>
<td>0.2%</td>
</tr>
<tr>
<td>Duplex</td>
<td></td>
<td>660</td>
<td>2.0%</td>
</tr>
<tr>
<td>Fourplex</td>
<td></td>
<td>352</td>
<td>1.0%</td>
</tr>
<tr>
<td>Mobile Home</td>
<td></td>
<td>479</td>
<td>1.4%</td>
</tr>
<tr>
<td>Multifamily</td>
<td></td>
<td>4,515</td>
<td>13.3%</td>
</tr>
<tr>
<td>Single Family, Attached</td>
<td></td>
<td>458</td>
<td>1.4%</td>
</tr>
<tr>
<td>Single Family, Detached</td>
<td></td>
<td>27,300</td>
<td>80.7%</td>
</tr>
<tr>
<td>All Multifamily</td>
<td></td>
<td>5,605</td>
<td>16.6%</td>
</tr>
<tr>
<td>All Single Family</td>
<td></td>
<td>28,237</td>
<td>83.4%</td>
</tr>
</tbody>
</table>

Source: Williamson County Appraisal District (WCAD) 2018 Data

### Planning Area Housing Type - Claritas

<table>
<thead>
<tr>
<th>Subarea</th>
<th>Combined</th>
<th>Count</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Housing Units</td>
<td></td>
<td>35,817</td>
<td></td>
</tr>
<tr>
<td>1 Unit Attached</td>
<td></td>
<td>1,176</td>
<td>3.3%</td>
</tr>
<tr>
<td>1 Unit Detached</td>
<td></td>
<td>28,641</td>
<td>80.0%</td>
</tr>
<tr>
<td>2 Units</td>
<td></td>
<td>659</td>
<td>1.8%</td>
</tr>
<tr>
<td>3 or 4 Units</td>
<td></td>
<td>1,287</td>
<td>3.6%</td>
</tr>
<tr>
<td>5 to 19 Units</td>
<td></td>
<td>1,720</td>
<td>4.8%</td>
</tr>
<tr>
<td>20 to 49 Units</td>
<td></td>
<td>486</td>
<td>1.4%</td>
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<tr>
<td>50 or More Units</td>
<td></td>
<td>648</td>
<td>1.8%</td>
</tr>
<tr>
<td>Mobile Home or Trailer</td>
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<td>1,079</td>
<td>3.0%</td>
</tr>
<tr>
<td>Boat, RV, Van, etc.</td>
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<td>119</td>
<td>0.3%</td>
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<tr>
<td>Dominant structure type</td>
<td></td>
<td>1 Unit Detached</td>
<td></td>
</tr>
</tbody>
</table>

Source: Nielsen/Claritas 2018 via PCensus
PLANNING AREA SALES PRICES 2008-2018

Planning Area Sales By Price
2008-2010

Planning Area Sales By Price
2011-2013

Planning Area Sales By Price
2014-2016

Planning Area Sales By Price
2017-2018

Source: ABOV/NMLS July 2018

Source: ABOV/NMLS July 2018

Source: ABOV/NMLS July 2018

Source: ABOV/NMLS July 2018

$0 to $199,999  $200,000 to $274,999
$275,000 to $349,999  $350,000 to $424,999
$425,000 to $499,999  $500,000 and up

$0 to $199,999  $200,000 to $274,999
$275,000 to $349,999  $350,000 to $424,999
$425,000 to $499,999  $500,000 and up

$0 to $199,999  $200,000 to $274,999
$275,000 to $349,999  $350,000 to $424,999
$425,000 to $499,999  $500,000 and up
PLANNING AREA HOUSING PRICES 2008-2018

Planning Area Median Sale Price Per SF

Source: ABOR/MLS July 2018
PLANNING AREA FINDINGS

• 16.6% MF Smaller lot sizes and square footage
• $146 per sq/ft (median 2018)
• 22.4% Renters
• Median Household income is $81,219 (94% AMI)
• Homeowners average of 9 years
• Average household size 2.47 persons
• Median home size 1,994 sq ft.
• Median lot size .23 acre
SUBAREA 1 FINDINGS

• 33% MF (twice planning area %)
• Smaller lot sizes and square footage
• $191 per sq/ft (median 2018)
• 51% Renters (twice planning area %)
• Median Household income is 60% AMI
• Homeowners stayed longer than planning area average (11 years vs. 9 years)
SUBAREA 2 FINDINGS

- 83% MF (5X planning area %)
- $183 per sq/ft (median 2018)
- 79% Renters (over 3X planning area%)
- Median Household income is approx. 50% AMI
- Below Poverty Rate 11.4% vs 4.2% area wide
- Average Household size 1.8
SUBAREA 3 FINDINGS

- 75% Single Family housing
- $127 per sq/ft (median 2018)
- Median Household income is over 100% AMI
- Average Household size 2.89 – more families with children
SUBAREA 4 FINDINGS

• 76% Single Family housing
• 42% renters (almost twice planning area)
• $132 per sq/ft (median 2018)
• Median Household income is approx. 90% AMI
• Average Household size 2.99 – more families with children
SUBAREA 5 FINDINGS

• 70% Single Family housing
• 42% renters (almost twice planning area)
• $132 per sq/ft (median 2018)
• Median Household income is just over 80% AMI
• 97% of homes under $200K in 2008-2010, only 33% of homes under $200K in 2017-2018
SUBAREA 6 FINDINGS

- 31.8% Multi-family (almost twice planning area)
- 37.3% renters
- $146 per sq/ft (median 2018)
- Median Household income is approx 80% AMI
SUBAREA 7 FINDINGS

- 94% Single Family housing
- 6% renters
- $156 per sq/ft (median 2018)
- Median Household income is over 140% AMI
- Larger lot sizes (1 acre)
• 92% Single Family housing
• 7% renters
• $127 per sq/ft (median 2018)
• Median Household income is over 130% AMI
• Average Household size 2.8 – more families with children
SUBAREA 9 FINDINGS

- 100% Single Family housing
- 4.6% renters
- $163 per sq/ft (median 2018)
- Median Household income is over 90% AMI
- Average Household size 1.86
- 60% of homes under $200K in 2008-2010, only 5% of homes under $200K in 2017-2018
SUBAREA 10 FINDINGS

• 100% Single Family housing
• 16% renters
• $170 per sq/ft (median 2018)
• Median Household income is over 80% AMI
• 0% of homes under $200K, 44% homes over $500K in 2017-2018
• Larger lot sizes (10 acre average)
SUBAREA 11 FINDINGS

• 100% Single Family housing
• 5% renters
• $170 per sq/ft (median 2018)
• Median Household income is over 120% AMI
• Average Household size 2.75 – more families with children
• Larger lot sizes (3.5 acre average)
SUBAREA 12 FINDINGS

• 100% Single Family housing
• 6% renters
• $149 per sq/ft (median 2018)
• Median Household income is over 140% AMI
• Larger lot sizes (3.5 acre average)
SUBAREA 13 FINDINGS

• 100% Single Family housing
• 46% renters (twice planning area)
• $261 per sq/ft (median 2018)
• 60% of sales over $500k in 2018
• Median Household income is 90% AMI
• Larger lot sizes (4 acre average)
SUBAREA 14 FINDINGS

• 98% Single Family housing
• 18% renters
• $143 per sq/ft (median 2018)
• Median Household income is over 80% AMI
• Average Household size 2.85 – more families with children
Next Steps

• Begin work on Williams Drive Subarea and Gateways
• National Night Out/On The Table Georgetown – 10/2
• October Meeting
  • Review Public Meeting #1 outcomes. Draft summary of findings for Steering Committee, Joint Meeting.
  • Introduce Housing Inventory