

APPENDICES

Appendix J: State of the City

The purpose of this report is to provide a summary of population, demographics, economic characteristics, and housing that will influence future growth and community needs.

Demographics and Housing

Demographics are characteristics that describe population, including age, sex, race, ethnicity, employment, and economics. Housing and household characteristics describe dwellings and the profile of the people residing in those households.

This report utilizes the most recent American Community Survey (ACS) to establish general trends in the City. Maintained by the U.S. Census Bureau, the ACS is conducted annually during non-decennial Census years and provides estimates regarding a range of demographic, economic, and housing factors. Although there are many different sources for demographic information as it pertains to Georgetown, the ACS is updated annually at the local, county, and state levels, which allows for more accurate comparisons over time and against other communities.

Population Trends

Based on data collected from through the U.S. Census Bureau, Georgetown has experienced steady growth, with the most rapid growth occurring since the early 1990s. Georgetown's growth has outpaced growth of Williamson County, with growth of 25 percent and 16 percent respectively between 2010 and 2016. As of 2016, Georgetown's population approached 60,000 residents and accounted for roughly 12 percent of the population of Williamson County. It should be noted that all historical population estimates and counts consider only residents inside of the City limits at that time. **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.**

Located just north of the City of Austin and Travis County, Georgetown's rapid growth is reflective of growth trends occurring throughout central Texas. The Austin-Round Rock Metropolitan Statistical Area (MSA) grew by over 37 percent from 2000 to 2010, and another 13 percent between 2010 and 2016. The MSA's population surpassed 2 million people in 2015 (Austin Chamber of Commerce).

Changing Demographics in Georgetown:

Population:	Median Age:	Median Household Income:
• 2000: 28,339*	• 2000: 36.9*	• 2000: \$54,098*
• 2010: 47,400*	• 2010: 44.0*	• 2010: \$60,888***
• 2016: 59,436**	• 2016: 45.8**	• 2016: \$64,256**

Sources:

*Decennial Census; Plan 2030

**U.S. Census Bureau, 2016 ACS

***U.S. Census Bureau, 2010 ACS

2016 Population of
Georgetown

59,436

+25%
2010-2016

2016 Population of
Williamson County

490,619

+16%
2010-2016

2016 Population of
Austin-Round Rock

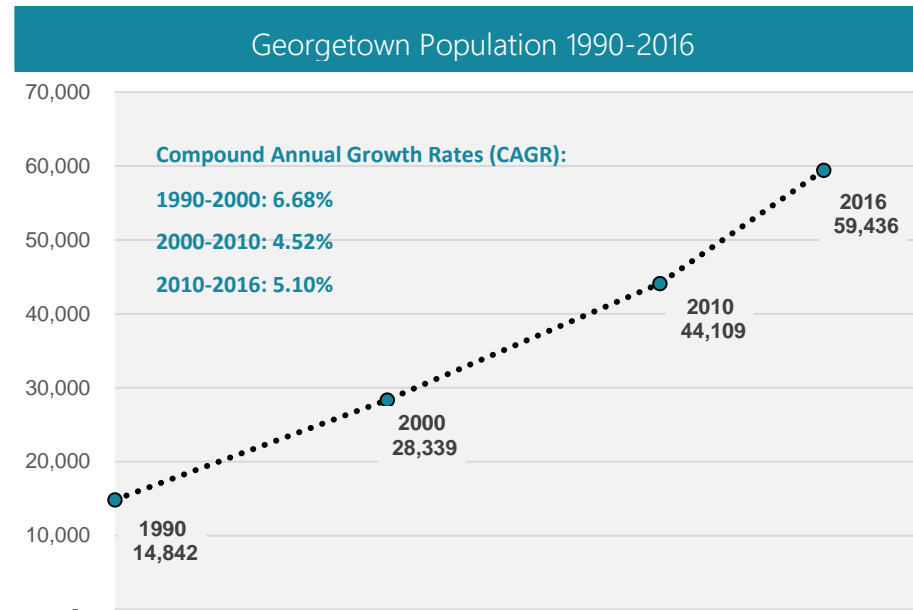
1,942,615

+13%
2010-2016

Source: U.S. Census Bureau, 2016 ACS

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Georgetown's population at any given time is an estimate. The decennial census, which occurs every 10 years, is the only time that a door-to-door population count occurs. Georgetown estimates population based on the most decennial Census count – currently 2010 – and calculates additional population added by the residential single-family water permits that have been issued since that time.



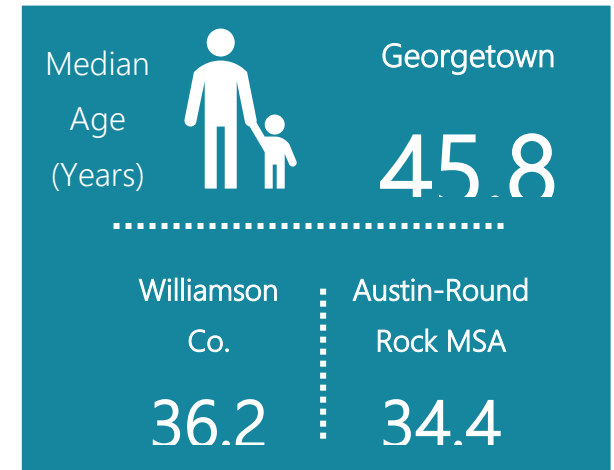
Source: U.S. Census Bureau, Decennial Census

Age and Sex

The Age and Sex Pyramid below shows the age distribution by sex for Georgetown compared to Williamson County. Typically, a population pyramid takes the general shape of a triangle pointing upwards, which would indicate that the population has a steady flow of young people to fill the workforce as older people age out of it. Georgetown's pyramid is somewhat unusual in shape with the largest concentration at the top, representing generally retired people. The next largest groups within Georgetown are families, including school-age children and adults in their late 20s to 40s. This differs significantly from Williamson County, which, while heaviest in the middle, is less top-heavy than Georgetown. Williamson County's largest groups are workforce and school children.

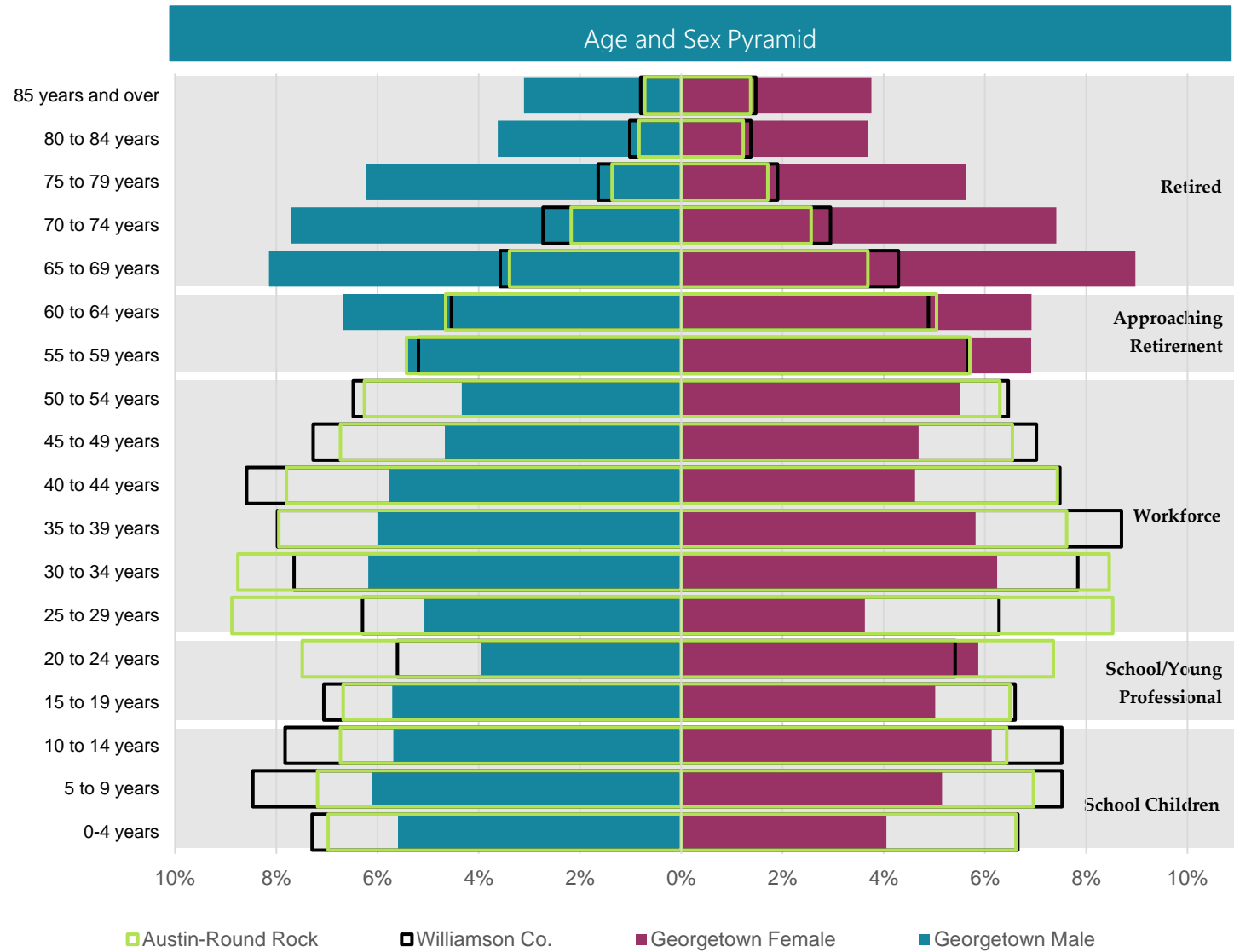
There are several apparent trends that are important to consider in this Plan:

- Both Georgetown and Williamson County have a relatively small population of children, though the County's distribution is larger. Although population growth will undoubtedly increase this number, it is unclear if it will increase the distribution of children relative to other groups. This group is increased by attracting new families into the City and providing housing options for existing families to move into as they grow.
- Both Williamson County and Georgetown have a shortage of college-age adolescents and young professionals. These groups tend to cluster around universities and employment centers, especially in cities with affordable housing, strong connectivity, and amenities that support an active lifestyle.
- Georgetown has a lower distribution of workforce adults, which correlates to the City's lower distribution of children. In addition to adequate and desirable housing for families, workforce adults are attracted by availability of high-paying jobs.
- Georgetown has a high distribution of retirees and adults approaching retirement, which is unsurprising given the size and popularity of Sun City. A key component 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.



Source: U.S. Census Bureau, 2016 ACS

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Source: U.S. Census Bureau, 2016 ACS

Impact on Georgetown

This Plan strives to address the needs of Georgetown's growing and changing population. The following are potential policy considerations associated with demographic changes:



Housing

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



City Services

Cities provide a wide range of services to citizens. Understanding population trends is critical to providing the right services and maintaining (or enhancing) the existing level of service.



Healthcare

From children to seniors, 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 pedestrians and bicyclists as well as cars.



Employment

A community with a growing economy and population must provide a wide range of employment opportunities for part-time employees, young professionals, and career adults.

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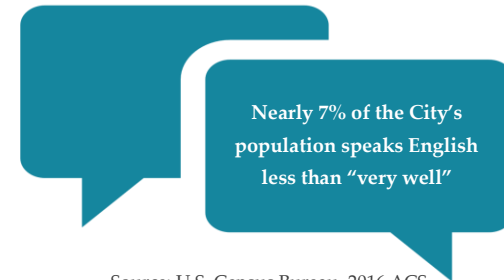
Race and Ethnicity

Racial and ethnic composition can help the City to ensure that its public is well represented in the decision-making process.

The population of Georgetown is predominately White, making up 92.3 percent of the total population, which is higher than that of the County. The next largest group are residents who identify as Black or African American (3.1 percent), some other race (2.1 percent), and two or more races (1.4 percent). Measured separately from race, Georgetown is more ethnically diverse than racially, with approximately 21 percent of the population identifying as Hispanic or Latino.

Nearly seven percent of the City's population speak English less than "very well", many of whom are fluent in Spanish. This is important to consider because outreach strategies targeted for non-native speakers often differ from more traditional approaches; such efforts could include emphasizing community, advocacy, leveraging and engaging local places of worship, and involving neighborhood schools for distribution of materials and information. This can be an important consideration for the City when distributing information, collecting input, conducting meetings, or hiring future employees.

Over time, Georgetown's ethnic diversity has remained largely unchanged. However, the City has become more racially diverse since 2000. It is important that Georgetown understand and consider its changing demographics as the City continues to grow in order to continue to meet the needs and desires of all residents.

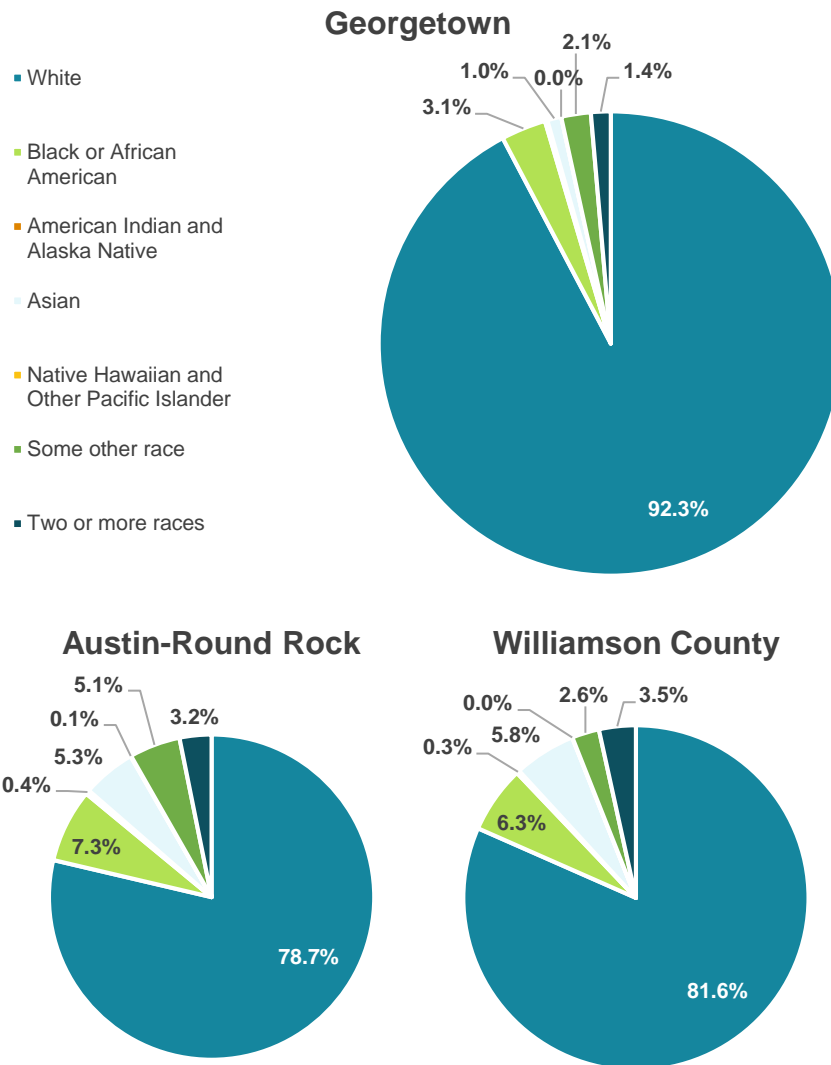


Source: U.S. Census Bureau, 2016 ACS

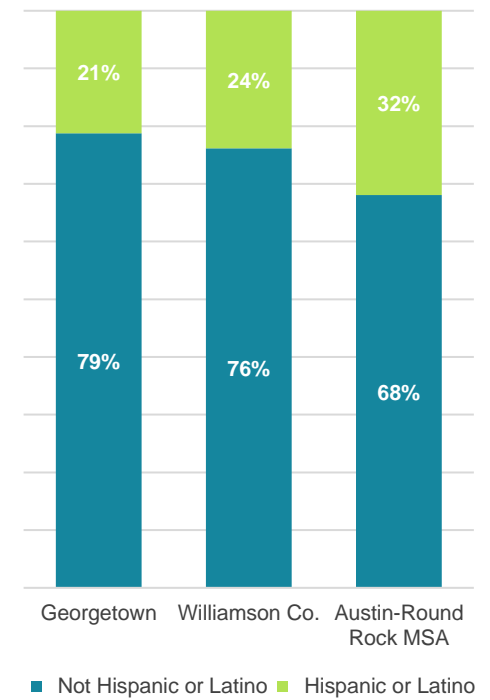
Race	Census Year	
	2000	2010
<i>One race</i>	98.2%	97.8%
White	85.4%	86.2%
Black or African American	3.4%	3.7%
American Indian or Alaska Native	0.4%	0.6%
Asian	0.7%	1.0%
Native Hawaiian and Pacific Islander	0.1%	0.1%
Some Other Race	8.3%	6.2%
<i>Two or More Races</i>	1.8%	2.2%
Ethnicity	2000	2010
Hispanic or Latino (of any race)	18.1%	21.8%
Not Hispanic or Latino	81.9%	78.2%

Source: U.S. Census Bureau, 2000, 2010 Decennial Census

Race



Ethnicity



Source: U.S. Census Bureau, 2016 ACS

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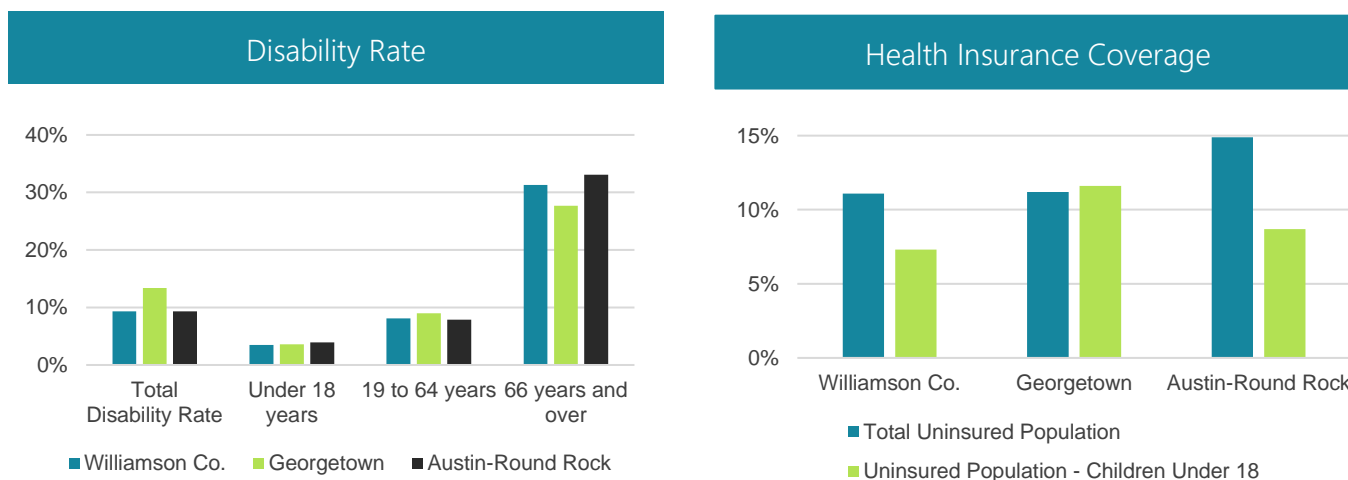
Social Indicators

Health and social trends within the community can be indicative of current or future need for social services, healthcare, or mobility options. Georgetown's overall rate of uninsured residents is on par with State and County averages. However, the City has a higher than average rate of uninsured children under 18 years of age. Georgetown also has a higher disability rate than the State and County. However, no individual group stands out as an outlier and the City's distribution of disabled seniors is below average.

Health indicators as a measure of social resiliency are already being assessed by Williamson County. The Community Health Assessment, part of Williamson County and Cities Health District, aims to address health issues within the community with a focus on building community partnerships and utilizing resources across agencies and groups. The assessment investigates numerous health-related policy areas, and ultimately recommends a focus on:

- Mental Health: Prevention, early intervention, support, and treatment for mental illness
- Access to Healthcare: Basic, affordable healthcare available for all residents
- Awareness of Healthcare Resources: Available information and communication channels for resources
- Active Living: Resources, access, and awareness for physical activity opportunities
- Chronic Disease: Prevention, treatment, and management of chronic diseases

This Assessment is implemented through the 2017-2019 Community Health Improvement Plan (CHIP), which provides an action plan for each of the five priority topic areas and aims to create a regional continuous process of improvement involving assessment, action planning, and reviews. The current 2017-2019 Plan is currently in the review process and is set to reenter the assessment process in 2019. These are important topics in public policy and city administration, which will likely warrant further study at a municipal level.

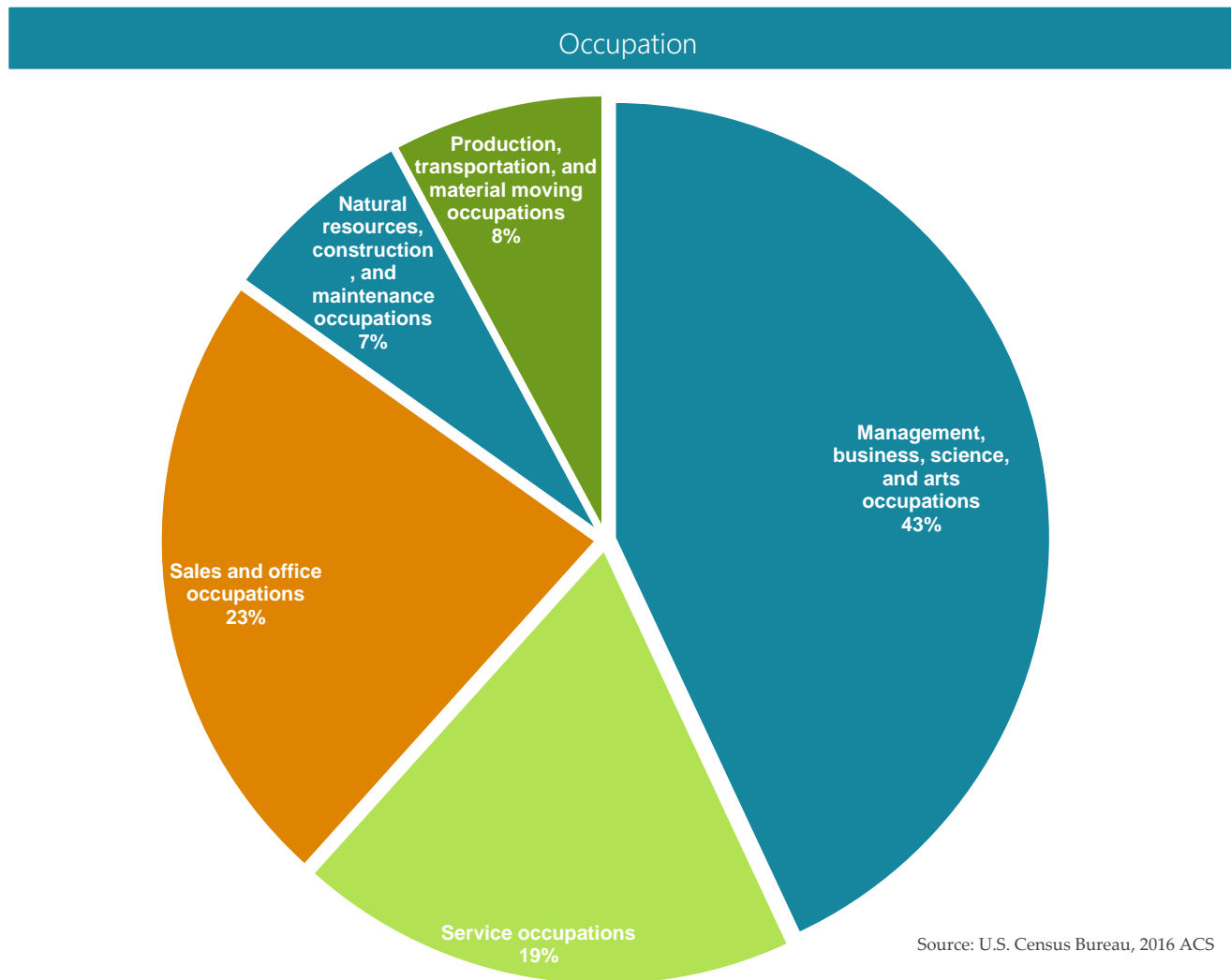


Source: U.S. Census Bureau, 2016 ACS

Employment and Economics

Knowledge of Georgetown's economic conditions is critical to understanding the community's needs regarding jobs and housing. The following data reflects the U.S. Census Bureau's 2016 American Community Survey. Note that this data corresponds to the residents of Georgetown, not the businesses of Georgetown.




"Occupation" describes the particular job roles held by employed members of the community regardless of whether such jobs are located within the community or region. Georgetown's largest occupations are 'management, business, science, and arts' followed by 'sales and office' and 'service'.



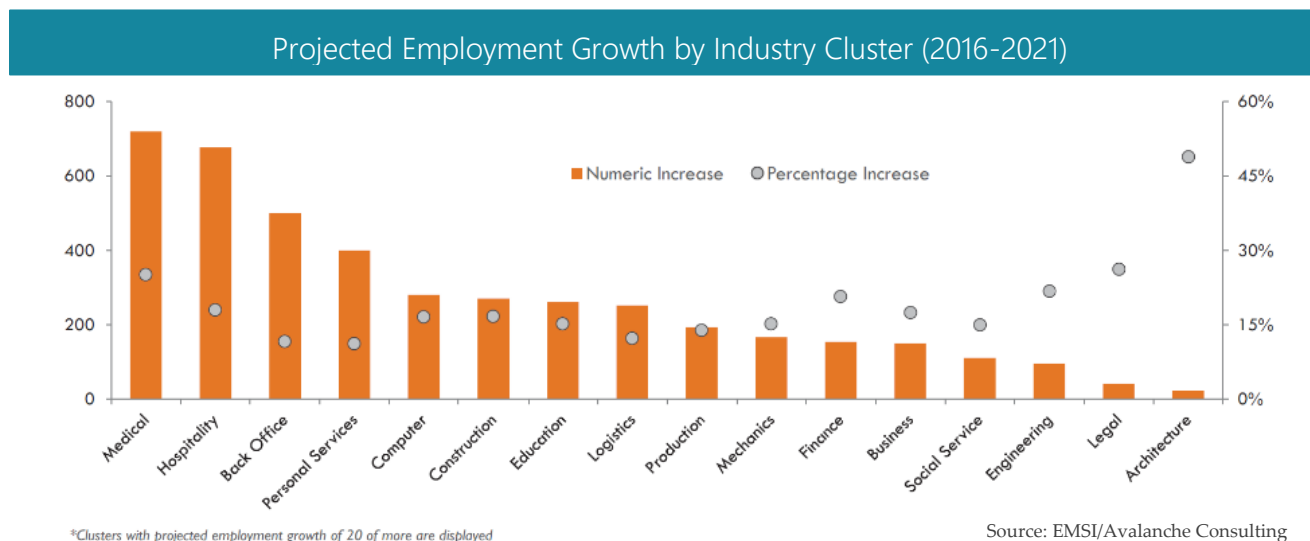
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The term “industry” describes the grouping of similar economic activities. It is a measure of the distribution of employment sectors within a community. The largest industry employing Georgetown residents is ‘educational services, healthcare, and social assistance’. This is also the largest industry for Williamson County, though Georgetown maintains an even higher distribution. The City’s second largest industries are ‘professional, science, management, administrative, and waste management services’ and ‘retail trade’. **These trends support the City’s recent target workforce and industry studies, which identified advanced manufacturing, life sciences, and professional services as target industries.**

The 2017 Workforce Analysis report identified the projected employment growth of major industries that are located within Georgetown. Many prominent existing industries are expected to continue to grow, including medical and hospitality. Conversely, these are some industries that are very limited presently but are expected to see growth in the future, such as engineering, legal, and architectural fields.

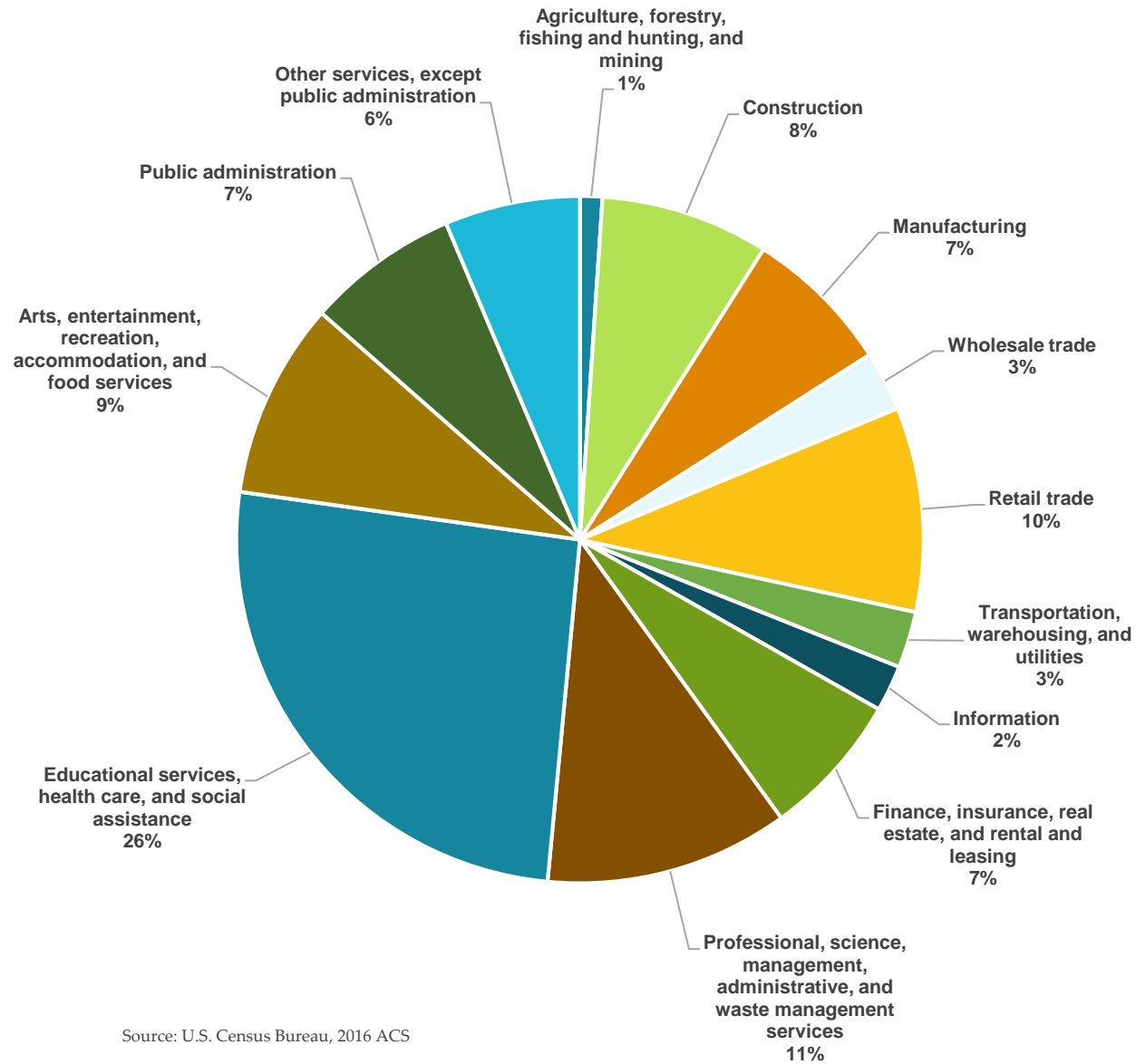
TARGET INDUSTRY	NICHE SECTORS
 Advanced Manufacturing	Aerospace & Aviation Clean Energy Technology Electronics & Component Manufacturing
 Life Sciences	Healthcare Services Medical Technology Pharmaceuticals
 Professional Services	Creative Design Engineering Services Software & Information Technology

Source: Target Industry Analysis, Avalanche, 2017



Source: EMSI/Avalanche Consulting

Industry



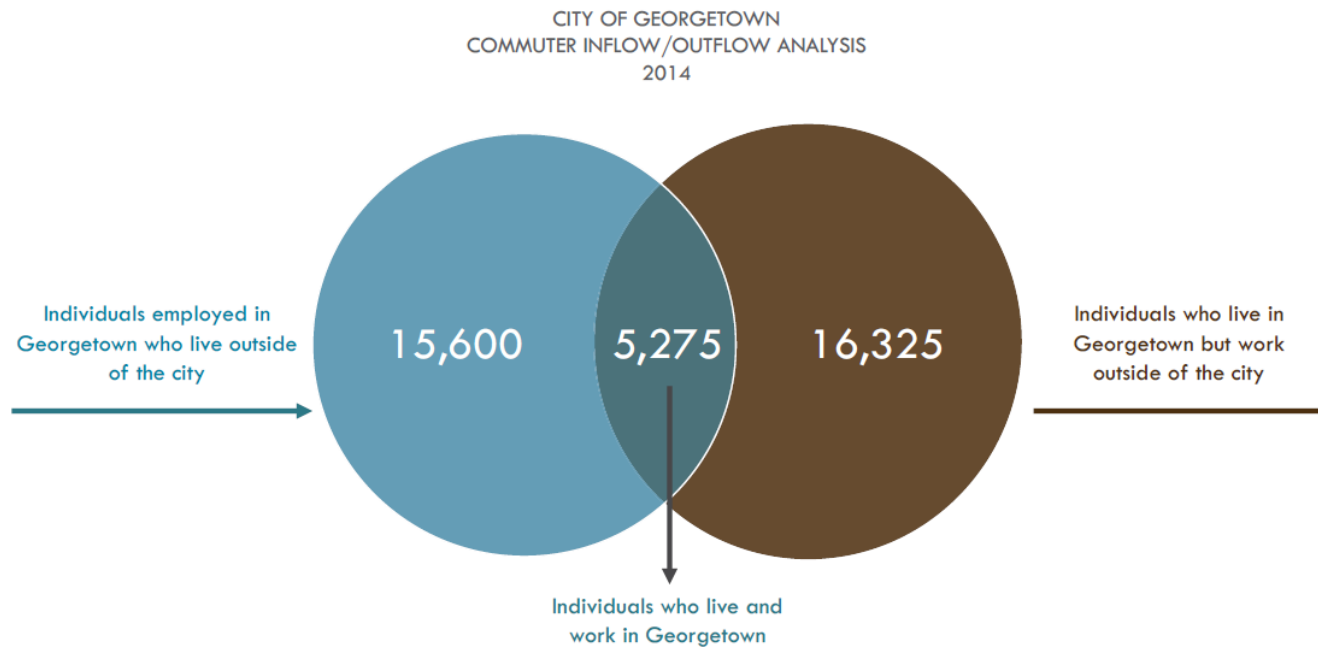
Source: U.S. Census Bureau, 2016 ACS

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Georgetown's population has grown by more than 30 percent in the last five years. This growth has facilitated industry and economic activity that benefits both the immediate community and greater Austin-Round Rock Metropolitan Statistical Area (MSA). From 2011 to 2016, overall employment within the Georgetown and the MSA grew by over 20 percent. (Avalanche, 2017). This increase in employment within Georgetown and the Austin-Round Rock Area indicates an increase in overall economic health.

The relocation of many prominent corporations into the Austin-Round Rock MSA is a key driver behind the region's population and employment boom; these include Apple, Dell Technologies, and IBM Corporation, as well as healthcare entities such as Seton Healthcare Family and St. David's Healthcare Partnership and a steady stream of highly educated young people graduating from the region's many universities.

Regional growth is important because it is estimated that over half of all Georgetown residents work outside of the City (a 2014 estimate pegged this number at approximately 75 percent). By contrast, approximately 75 percent of all jobs within Georgetown were filled by individuals living outside of the City (Avalanche, 2017).

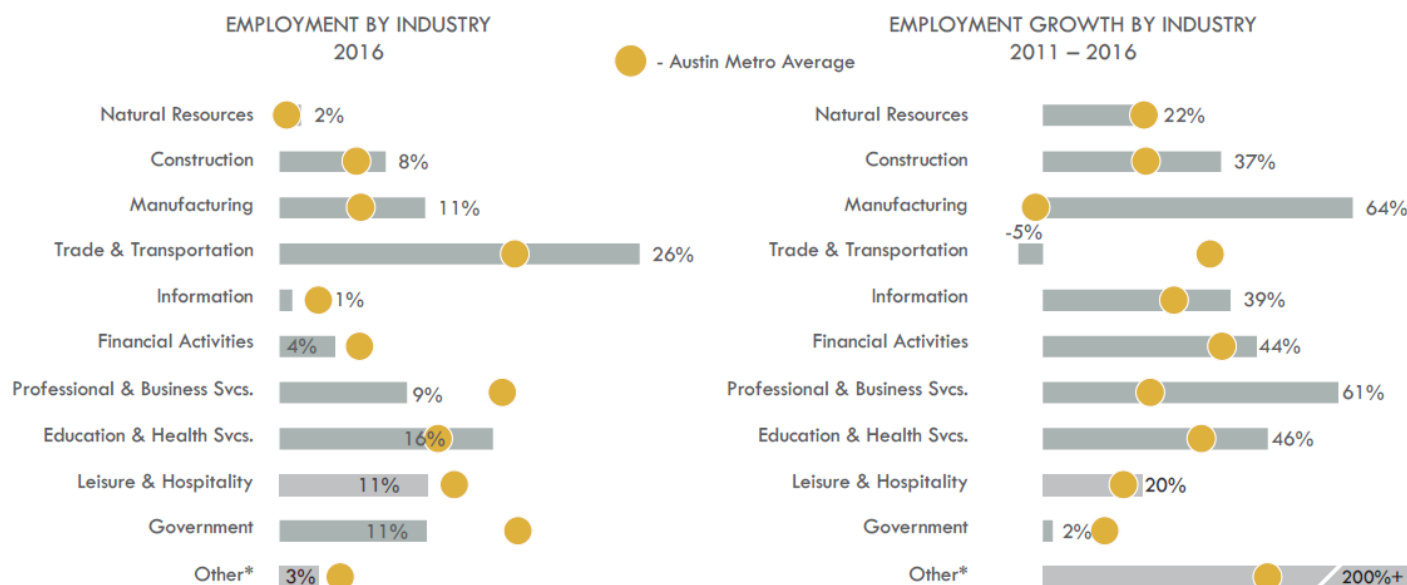


In the case of Georgetown and the Austin-Round Rock MSA, job growth is also a strong indicator of regional industry strength. From 2011 to 2016, the manufacturing industry within Georgetown increased by nearly 64 percent. In addition, professional and business services grew by 61 percent while educational and health services grew by 46 percent. **As of 2016, Georgetown's major industries were trade and transportation (26 percent), education and health services (16 percent), leisure and hospitality (11 percent), government (11 percent), and manufacturing (11 percent)** (Avalanche, 2017).

Source: Target Industry Analysis, Avalanche, 2017

During the same five-year time period in the Austin-Round Rock MSA, manufacturing decreased by five percent, totaling six percent of all jobs in the region (Avalanche, 2017). This decrease in the MSA coupled with an increase experienced by Georgetown indicates that Georgetown might be capturing regional industry growth.

Overall, Georgetown's industrial composition remains very different from that of the Austin-Round Rock MSA; government makes up a large portion of the region's economy primarily due to Austin's position as the State capital and County seat of government. In addition, professional and business services, financial activities, and leisure and hospitality make up a larger portion of the MSA's economy compared to Georgetown (Avalanche, 2017).



Source: Target Industry Analysis, Avalanche, 2017

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Commute time is directly impacted by many factors that are central to this Plan, including corridor design and function relative to adjacent uses and distance between employment centers and residential development. The average commute time in both Georgetown and Williamson County is approximately 27 minutes. According to the Workforce Analysis report, about 75 percent of Georgetown's residents work outside the City; about 75 percent of the jobs within the City are staffed by commuters living outside the City (Avalanche, 2017).

Income is an indicator of buying power and is important to understand when identifying the kinds of goods and services that are needed and desired in the community. The median household income in Georgetown is approximately \$64,000, compared to over \$75,000 in Williamson County and over \$66,000 in the Austin-Round Rock MSA.



More than ¾ of householders under 25 earn between \$50,000 and \$75,000:

- \$50,000 to \$60,000: 50.6%
- \$60,000 to \$75,000: 27.6%

Source: U.S. Census Bureau, 2016 ACS

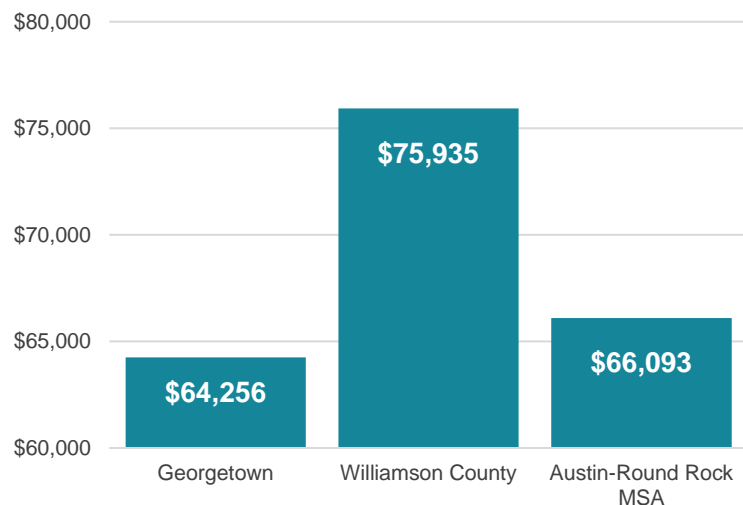
Average Commute Time



Georgetown	Williamson Co.	Austin - Round Rock
27.1 minutes	27.4 minutes	26.4 minutes

Source: U.S. Census Bureau, 2016 ACS

Median Household Income



\$64,256 | Georgetown

2006: \$55,700

2000: \$54,098

\$75,935 | Williamson Co.

2006: \$62,494

2000: \$60,642

\$66,093 | Austin-RR MSA

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%

Source: U.S. Census Bureau, 2016 ACS

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.

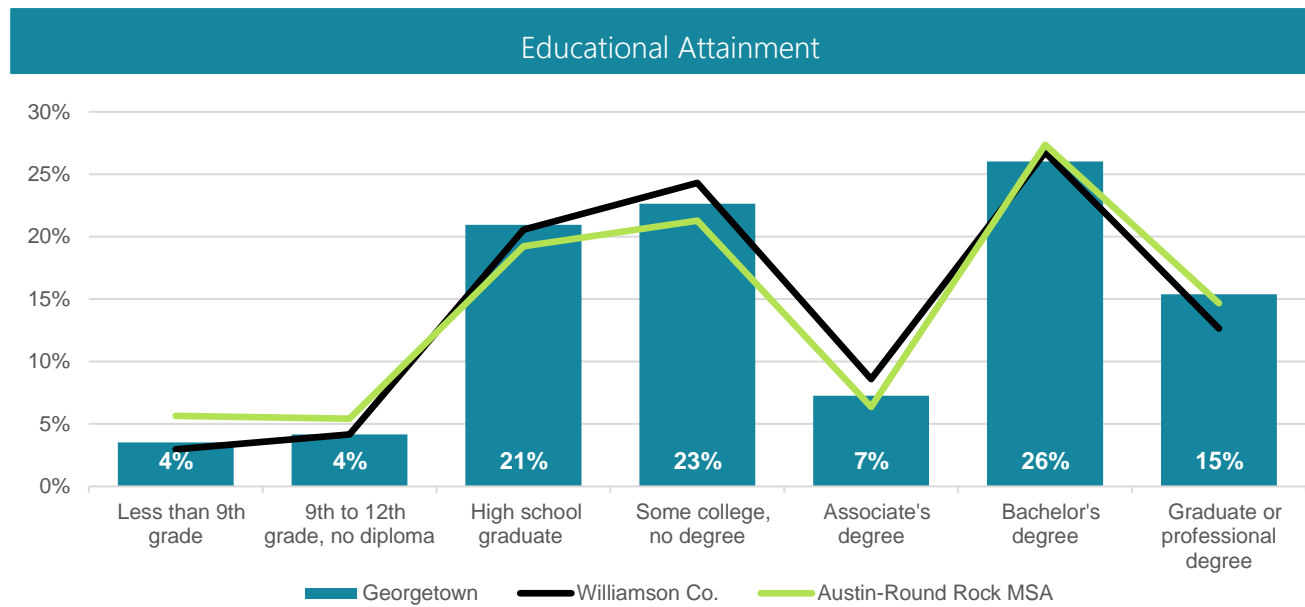
Employment growth in Georgetown has steadily increased at a rate of 20.7% between 2011 and 2016; correspondingly, the unemployment rate has steadily decreased in recent years with a rate of 3.9 percent in May 2017 (Avalanche, 2017).

Georgetown's educational attainment trends are very similar to Williamson County, with more than 70 percent of the population having at least some college education; however, Georgetown has a notably higher percentage of people with a graduate or professional degree.

	GISD	Texas
Total students	11,395	N/A
Students per teacher	14.5	15.1 students
Avg. teacher experience	12.7 years	10.9 years
Four-year graduation rate	97.7%	89.1%
At-risk students	45.3%	50.3%
Economically disadvantaged	43.3%	59%
Bilingual/ESL	13.6%	18.8%
Career and Technical	25.8%	25%
Gifted and Talented	7.1%	7.8%
Special Education	9.2%	8.8%



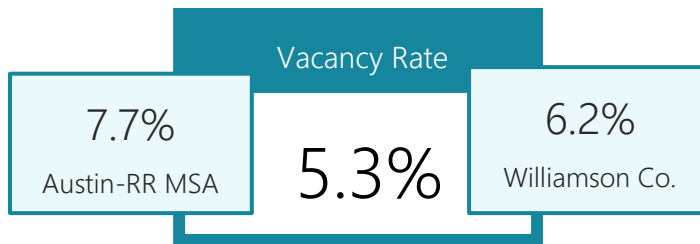
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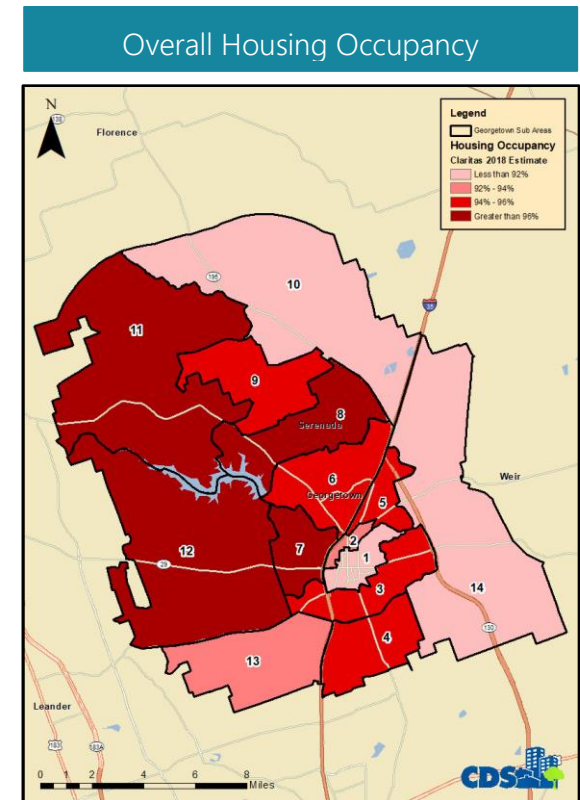
Source: U.S. Census Bureau, 2016 ACS

Housing and Household Characteristics

Vacancy rates can indicate desirability of a particular location or housing stock. Georgetown has a slightly lower overall vacancy rate compared to the County and MSA – five percent versus six and nearly eight percent. Among owner-occupied housing units (regardless of type), the vacancy rate in both Georgetown and Williamson County is 1.6; among rental units, the vacancy rate is 6.2 and 6.8 percent respectively. While these measures do not consider housing type, vacancy rates in the single digits often correspond to a tight housing market.



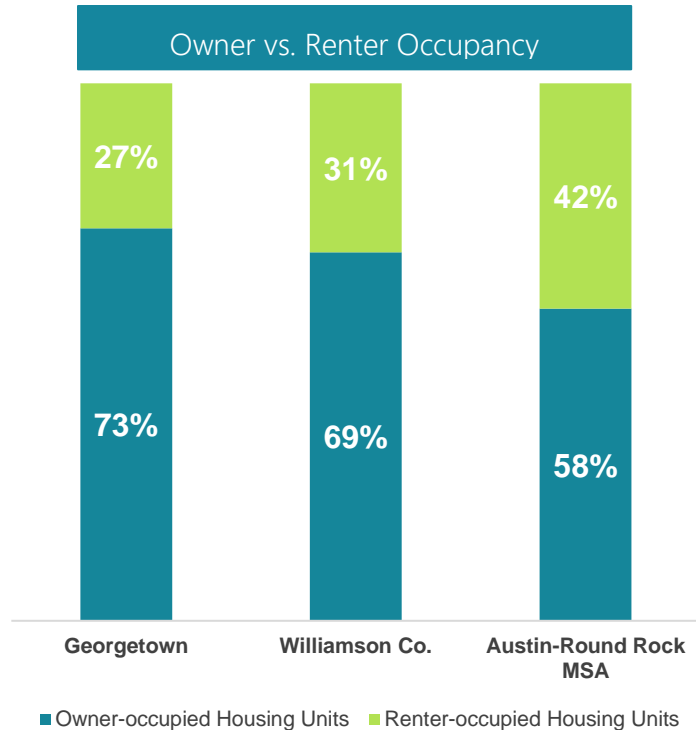
Source: U.S. Census Bureau, 2016 ACS



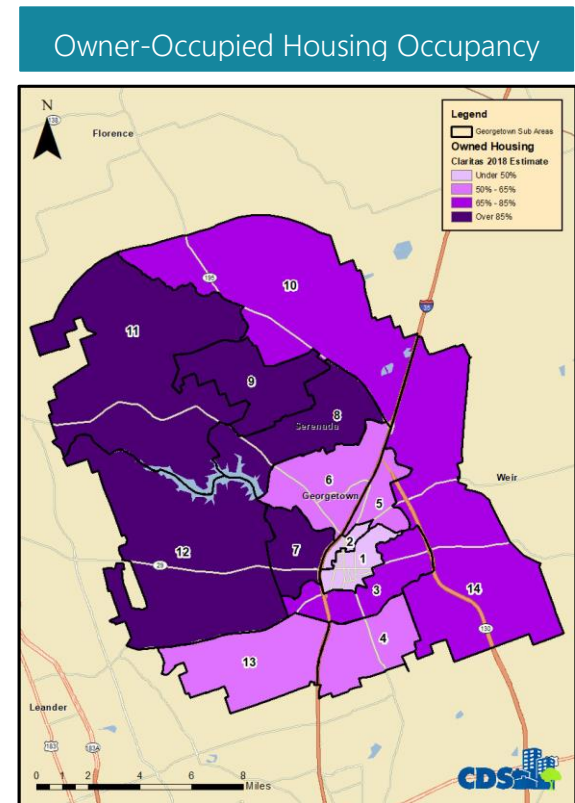
Source: CDS/Nielsen/Claritas Housing Data, 2018

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Georgetown also has a lower percentage of renters than Williamson County – 27 percent versus 31 percent. Both the lowest vacancy rates and highest owner-occupancy rates are located in the western portion of the City and its extraterritorial jurisdiction (ETJ), which could suggest a low supply of rental units relative to owner-occupied units and/or a growing demand for rental units in this area.



Source: U.S. Census Bureau, 2016 ACS



Source: CDS/Nielsen/Claritas Housing Data, 2018

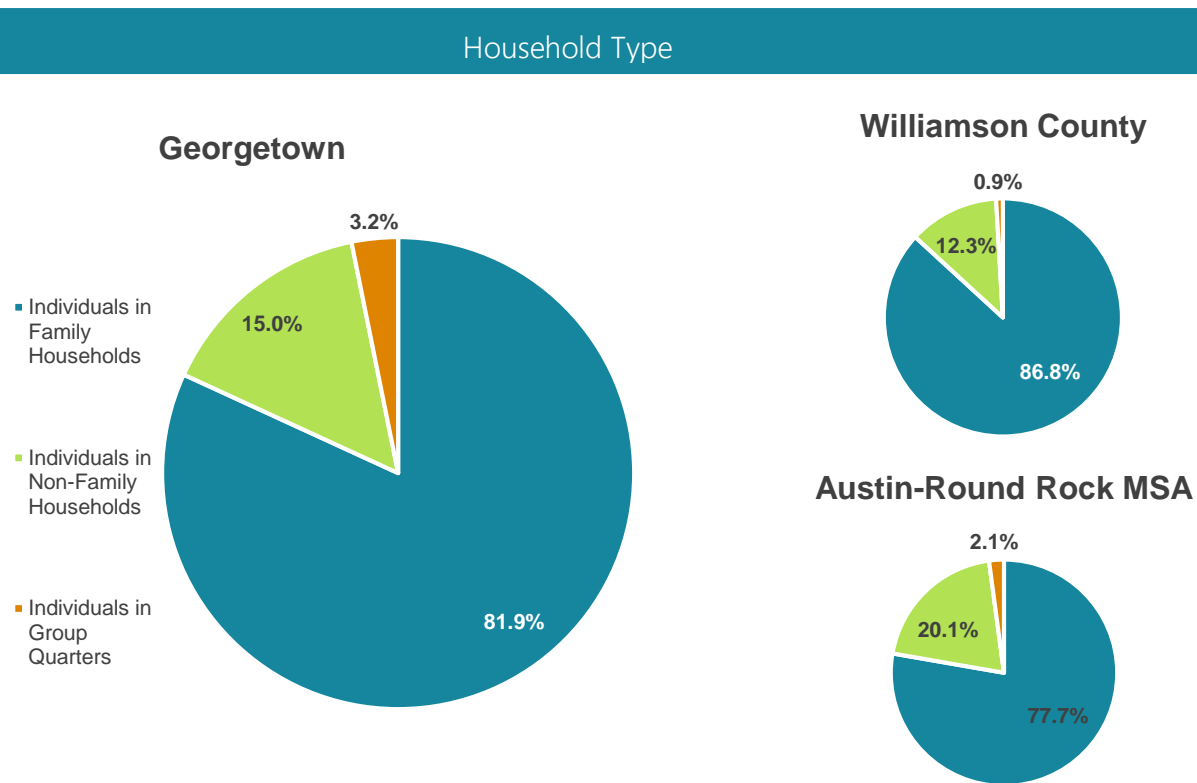
Georgetown has a lower average household size for both owner- and renter-occupied units compared to the County. This is primarily due to the large senior population without children living at home and partially due to the Southwestern University student population. Applied to housing, this trend could indicate demand for smaller units (e.g., studios or one bedrooms) or diversified housing types (e.g., patio homes or townhomes).

Average Household Size			
	Georgetown	Williamson Co.	Austin-Round Rock
Owner-Occupied	2.46	3.07	2.87
Renter-Occupied	2.45	2.66	2.45

Source: U.S. Census Bureau, 2016 ACS

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Compared to Williamson County, Georgetown has a slightly higher percentage of Individuals in Non-Family Households, which means that the householder either lives alone or with others who are unrelated to the householder. Georgetown also has a higher percentage of Individuals in Group Quarters, which includes those who live in dormitories or nursing homes, among other institutions. This trend likely correlates with Georgetown's household size and could similarly provide insight into preferences for future housing types.

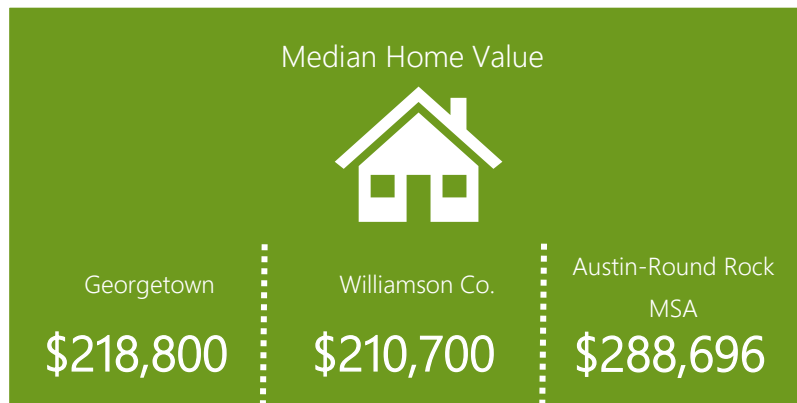


Source: U.S. Census Bureau, 2016 ACS

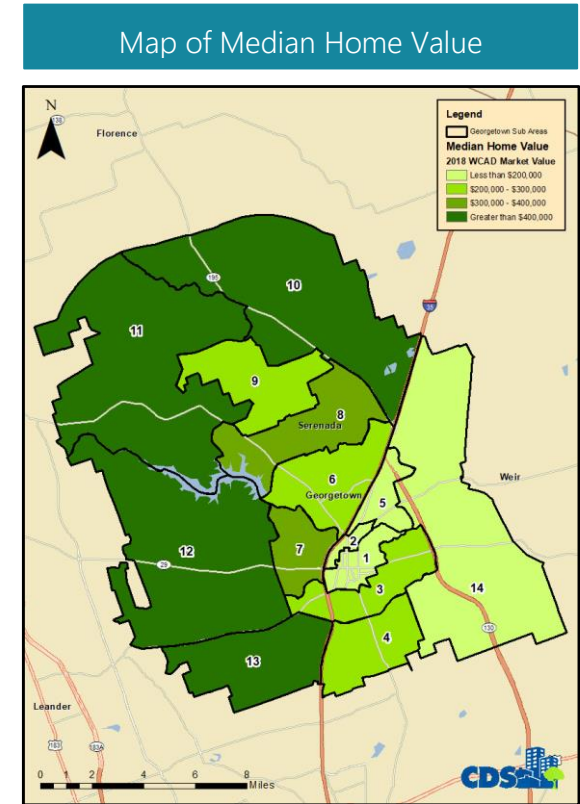
Home value is important to consider in evaluating the affordability of homes within a community – especially when considering future resident populations and location of industries.

According to the U.S. Census Bureau, Georgetown’s 2016 median home value of \$218,800 is \$8,100 higher than Williamson County’s. Updated information compiled in the Housing Element from the Williamson County Appraisal District (WCAD) shows that the estimated 2018 median home value in the City of Georgetown as \$269,593, which indicates that the availability of affordable housing may become a more significant issue in the near future (CDS/Nielsen/Claritas Housing Data, 2018). Note that the discrepancy between the median home values over this two-year period is related to differences in data collection methodologies; the ACS data is collected as a self-reported response to a sample survey, which is likely to be less accurate than the WCAD appraised value.

The highest value homes are located in the western and northern areas of the City’s extraterritorial jurisdiction (ETJ). The Housing Element contains a more in-depth analysis and recommendations for Georgetown’s housing conditions and needs, specifically regarding affordable housing, senior housing, and workforce housing.



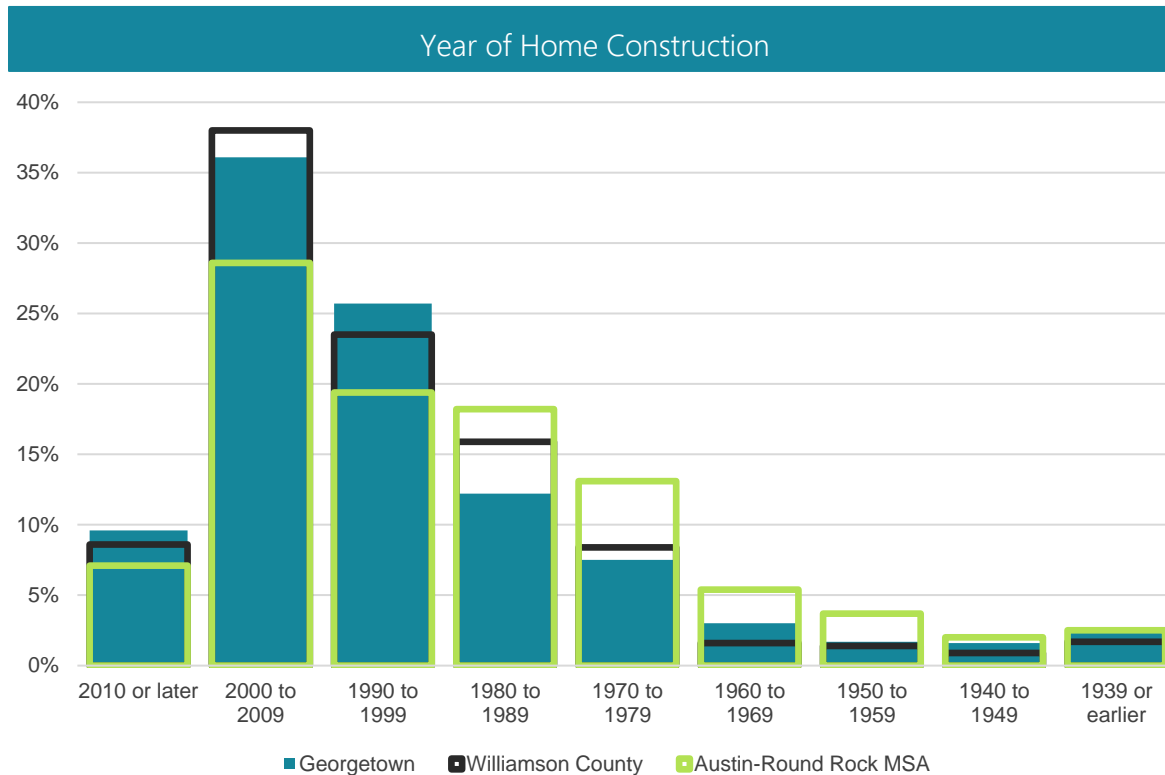
Source: U.S. Census Bureau, 2016 ACS



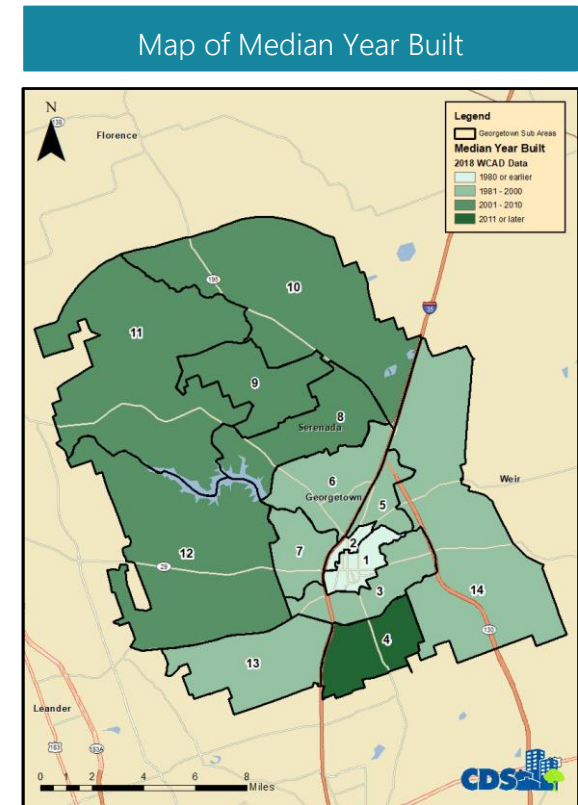
Source: CDS/Nielsen/Claritas Housing Data, 2018

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The Year of Home Construction graph below illustrates that more homes have been constructed during the 2000 to 2009 period than any other decade, which is consistent with Williamson County overall. The median year of construction is 2001. Much of Georgetown's newest housing is concentrated to the north and west, though the Teravista development in the far southern portion of the City is home to the newest housing. **The age of housing stock provides information related to housing diversity and planning for neighborhood programs relative to housing conditions over time.**

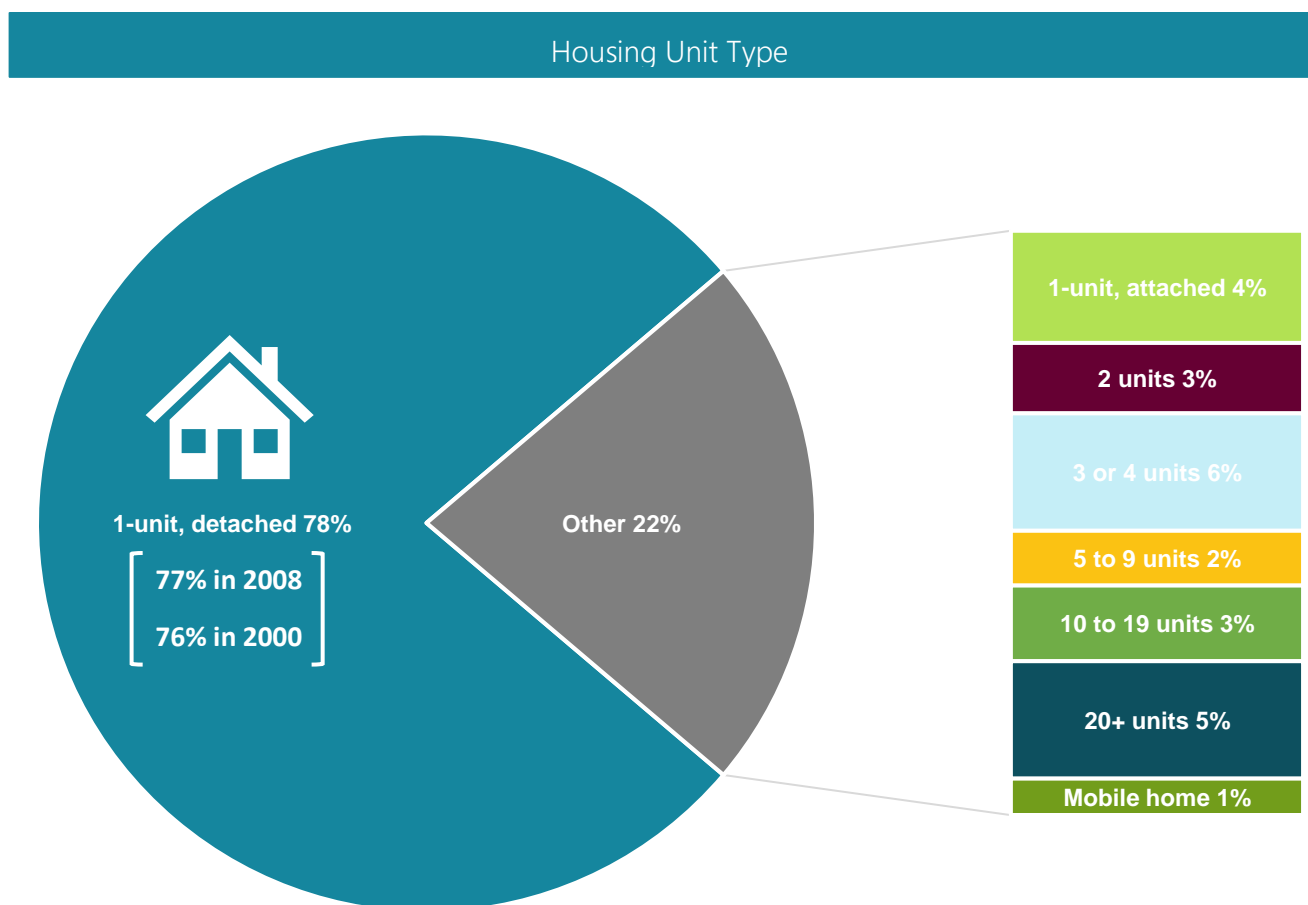


Source: U.S. Census Bureau, 2016 ACS



Source: CDS/Nielsen/Claritas Housing Data, 2018

Housing unit type is an important characteristic to consider so that cities can adequately understand housing challenges and issues facing their residents and workforce. The majority of the housing units in Georgetown – 78 percent – are traditional single-family detached homes. Williamson County has 74 percent single-family homes and the Austin-Round Rock Metropolitan Statistical Area (MSA) has 60 percent. Georgetown’s breakdown of housing unit types has remained virtually unchanged. This may be due to the annexation of lower density areas, which would offset the increased number of multi-family units.



Source: U.S. Census Bureau, 2016 ACS

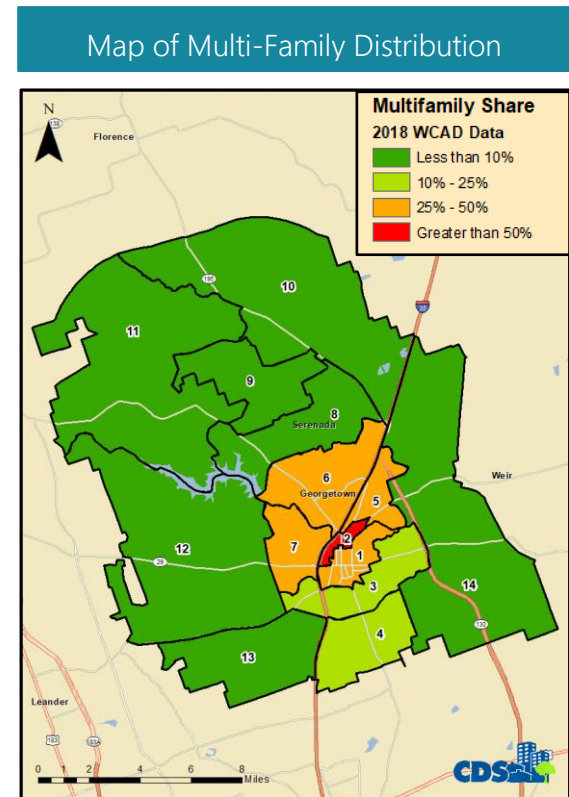
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In Georgetown, about four percent of all housing units are townhomes (1-unit attached), three percent are duplexes (2 units), seven percent are smaller apartments (3 to 9 units), and eight percent are larger apartments (10 or more units). The City's multi-family units are clustered near the core of the Georgetown, particularly along the east side of Interstate 35.

Unit Type	Georgetown	Williamson Co.	Austin-RR MSA
1-unit detached	78%	74%	60%
1-unit attached	4%	2%	3%
2 units	3%	2%	3%
3 or 4 units	5%	2%	3%
5 to 9 units	2%	3%	4%
10 to 19 units	3%	5%	8%
20+ units	5%	8%	14%
Mobile home	1%	3%	5%
Boat, RV, van, etc.	0%	0%	0%

Source: U.S. Census Bureau, 2016 ACS

Compared to Williamson County, Georgetown's composition of residential unit types is fairly similar. Overall, Georgetown has slightly more single family and lower density multifamily units as a percentage. However, Georgetown's distribution is, expectedly, significantly different from that of the Austin-Round Rock MSA, which almost three times more higher density multifamily units by percentage and 18 percentage points less single family.



Source: CDS/Nielsen/Claritas Housing Data, 2018