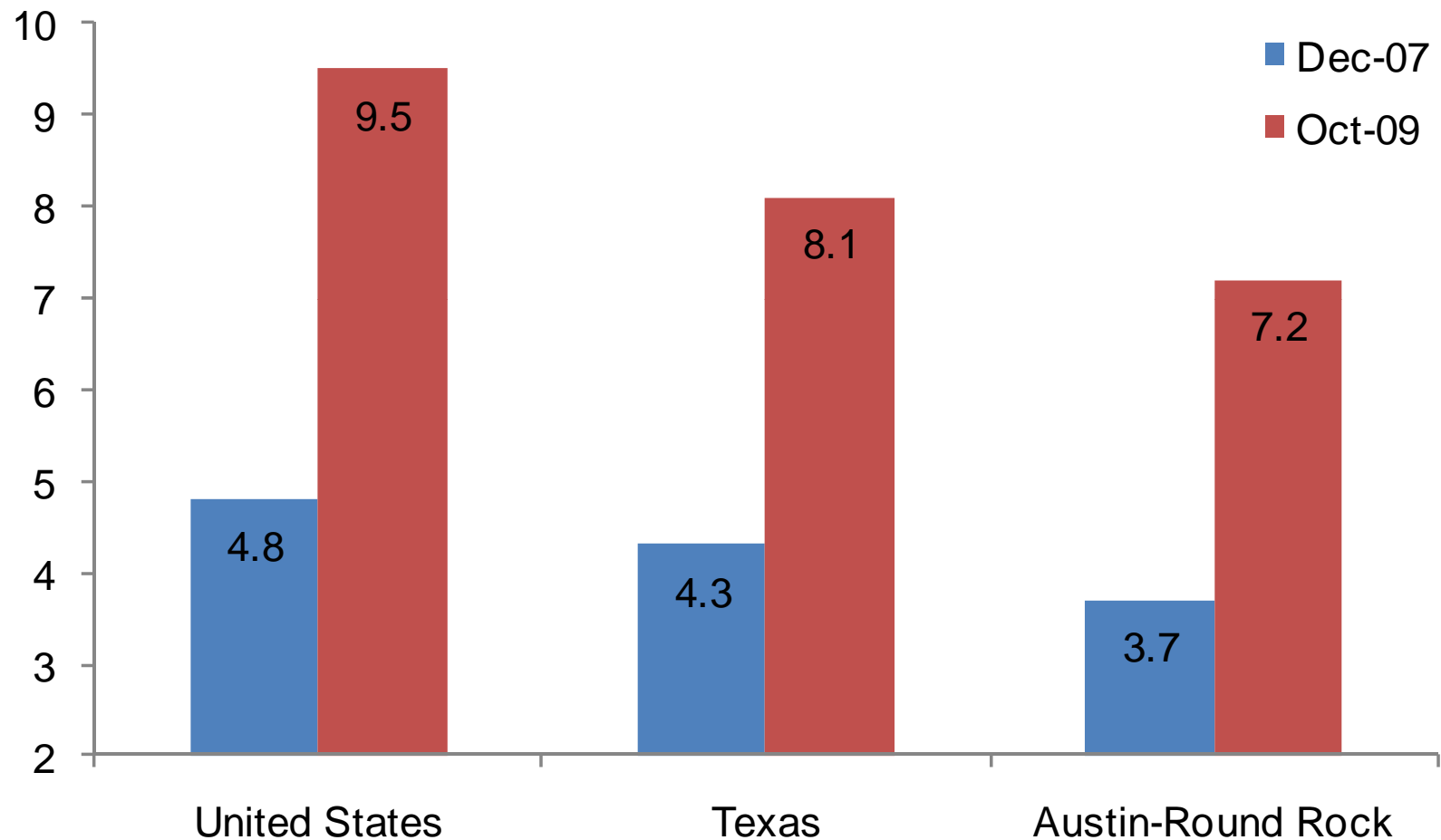


Looking Back: 2009 Predictions



- Mild recession predicted
- Slower growth
- Fewer people moving here
- Declining affordability (?)

Recession: Nothing Mild About Unemployment

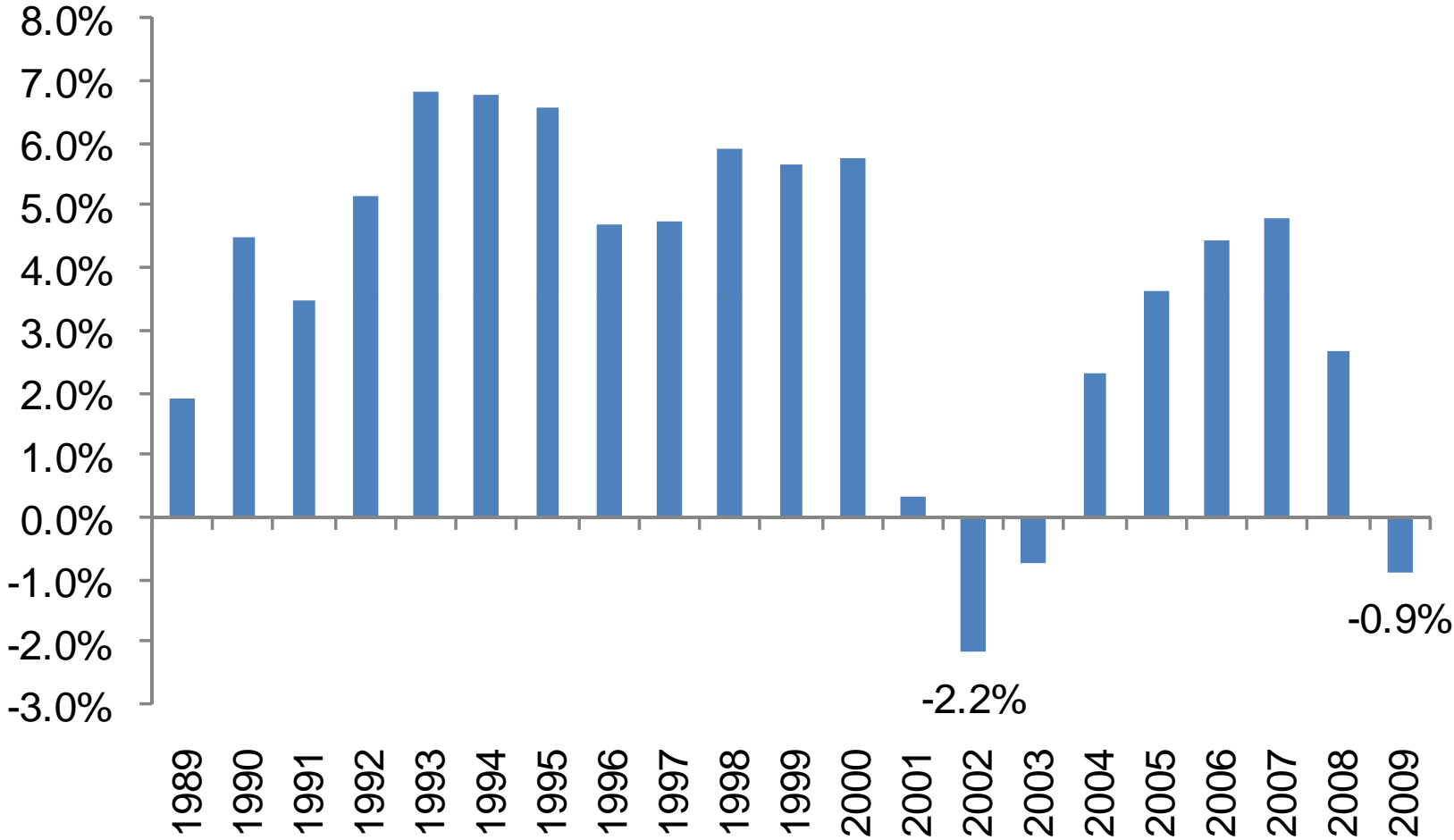


CAPCOG: 68,500 People Unemployed (Oct-09)

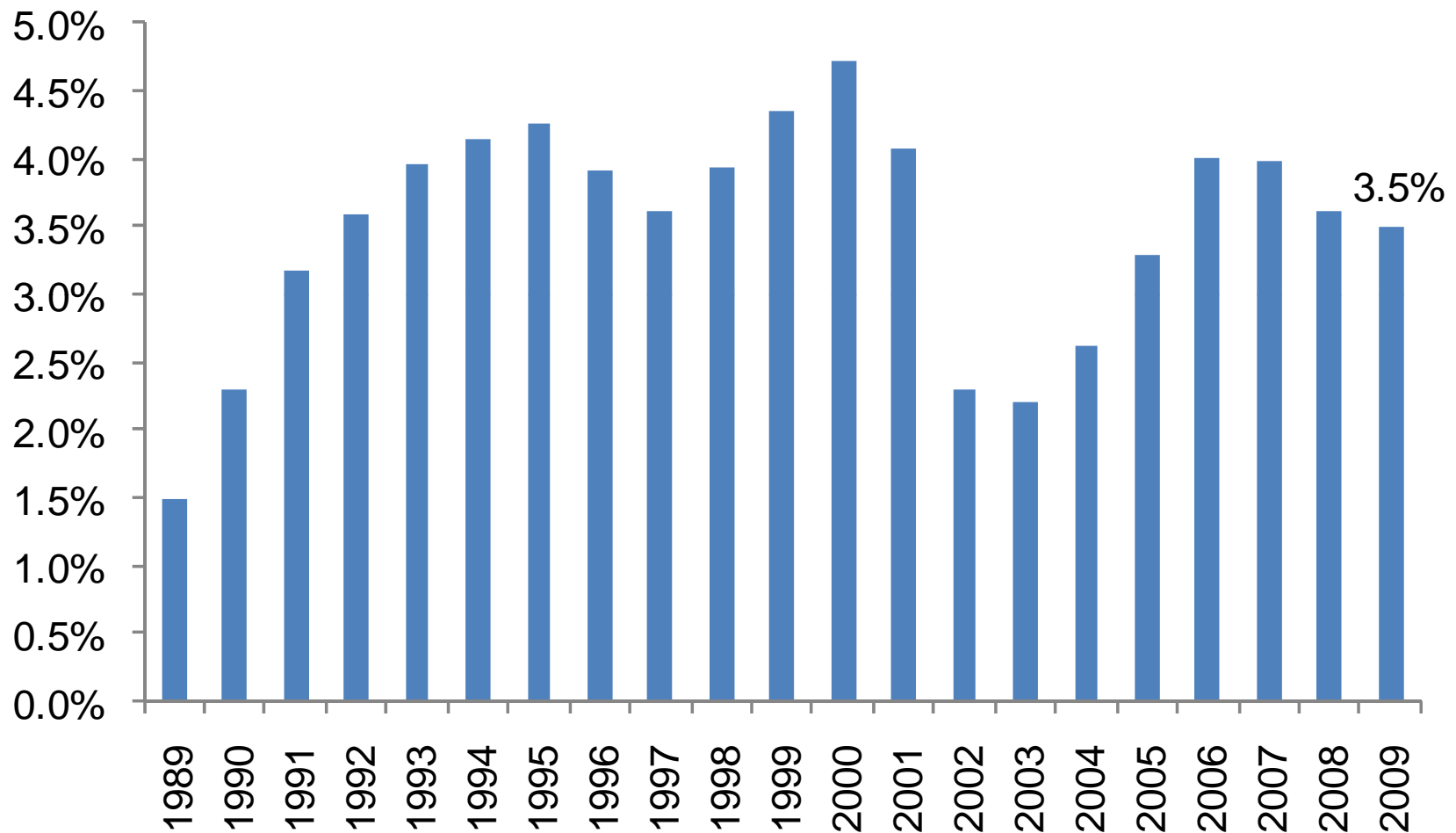


	Number of People	Oct 08 - Oct-09
Bastrop	2,943	63%
Blanco	266	46%
Burnet	1,397	48%
Caldwell	1,353	50%
Fayette	707	65%
Hays	5,234	53%
Lee	645	81%
Llano	665	72%
Travis	39,205	59%
Williamson	16,126	65%

Job Growth in CAPCOG Region



Population Growth in CAPCOG Region

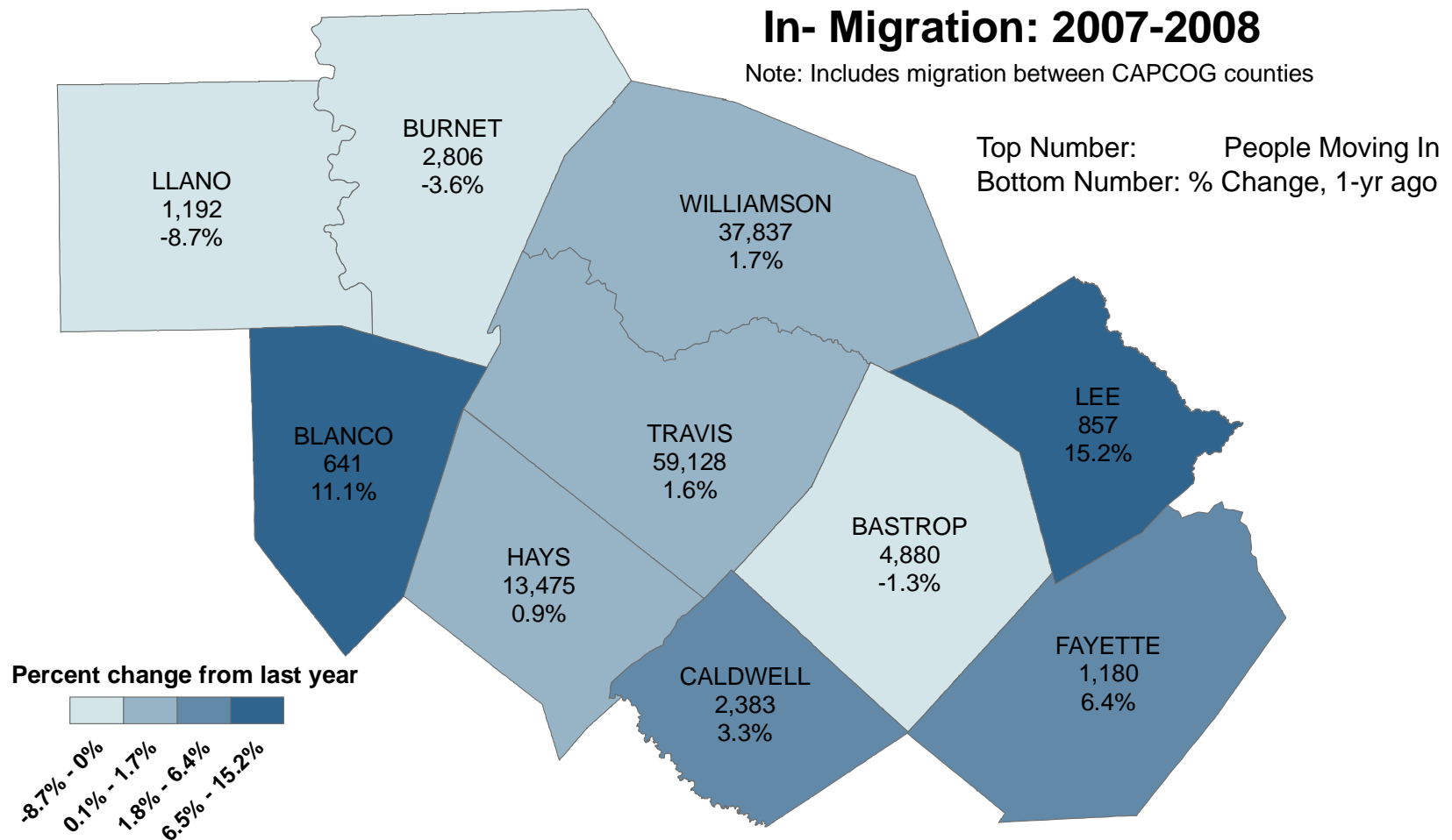


Population: Migration Holding Steady?



In- Migration: 2007-2008

Note: Includes migration between CAPCOG counties



Growing Industries (2009)



	Job Change	Growth Rate
Government	4,244	3%
Health care/social assistance	3,577	4%
Other (local) services	2,950	5%
Professional/technical services	2,921	3%
Accommodation/food services	1,216	2%
Finance and insurance	953	2%
Management of companies	814	14%
Utilities	89	4%

Declining Industries (2009)



	Job Change	Growth Rate
Construction	-9,914	-13%
Manufacturing	-7,530	-11%
Wholesale trade	-2,786	-6%
Administrative/waste services	-2,517	-4%
Information	-1,244	-4%
Transport/warehousing	-1,046	-5%
Mining	-737	-6%
Educational services	-670	-3%
Retail trade	-584	-1%

Growing Jobs (2009)



	Job Change	Median Wage
Food prep/serving	1,886	\$8.75
Healthcare general	1,408	\$33.32
Personal care and service	912	\$9.80
Healthcare support	763	\$11.70
Protective service	656	\$15.57
Community/social services	569	\$14.32
Education/training/library	559	\$22.62
Business/financial operations	467	\$21.13
Life/physical/social science	405	\$23.81

Declining Jobs (2009)



	Job Change	Median Wage
Construction and extraction	-6,961	\$17.21
Production occupations	-3,631	\$13.54
Transportation/material moving	-1,979	\$13.05
Management occupations	-1,859	\$24.75
Architecture and engineering	-1,230	\$30.05
Sales and related occupations	-1,198	\$12.24
Installation/maintenance/repair	-958	\$16.73
Computer/mathematical science	-645	\$32.67
Building/grounds cleaning	-611	\$8.72

Affordability: Housing Prices



	Median List (Oct-09)	Oct-08 – Oct-09
Austin	\$249,900	-5.7%
Round Rock	\$199,000	-7.5%
Cedar Park	\$250,000	-4.2%
San Marcos	\$165,000	-5.7%
Buda	\$183,000	-3.4%
Kyle	\$144,000	-4.0%
Bastrop	\$147,900	-4.5%
Burnet	\$149,600	-9.6%
Lockhart	\$114,900	-8.0%

US: \$214,500 (-8.7%), TX: \$184,800 (-0.1%)

Looking Ahead: 2010 Predictions



- Job growth: 1.1% (3.6% avg.)
- Population growth: 3.1% (3.5% avg.)
- Minimal wage and disposable income gains
- Housing starts: 13,772 (approximate level of activity seen in 2008)

2010: CAPCOG County Breakdown



Jobs	2010	2009
Bastrop	0.6%	-0.5%
Blanco	-0.5%	-4.0%
Burnet	2.0%	-2.4%
Caldwell	-0.8%	-1.8%
Fayette	-0.4%	-4.4%
Hays	2.2%	-0.4%
Lee	-0.5%	-4.7%
Llano	2.1%	-2.3%
Travis	0.6%	-1.3%
Williamson	3.3%	1.6%

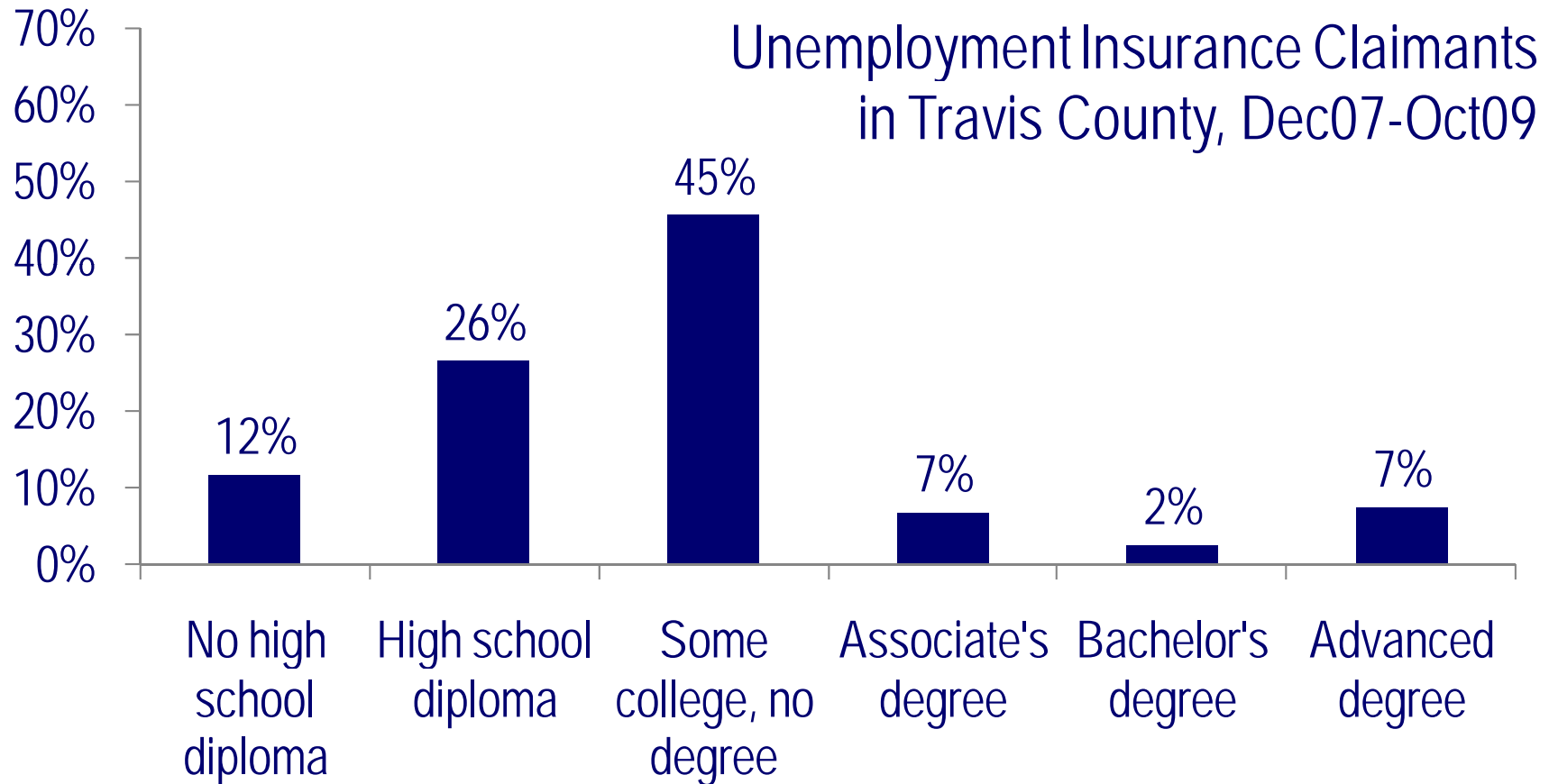
Population	2010	2009
Bastrop	2.0%	2.1%
Blanco	0.9%	0.8%
Burnet	2.8%	2.7%
Caldwell	0.8%	0.8%
Fayette	0.8%	0.8%
Hays	4.7%	5.3%
Lee	0.7%	0.7%
Llano	1.1%	1.0%
Travis	2.3%	2.7%
Williamson	5.2%	5.8%

2010: Key Questions

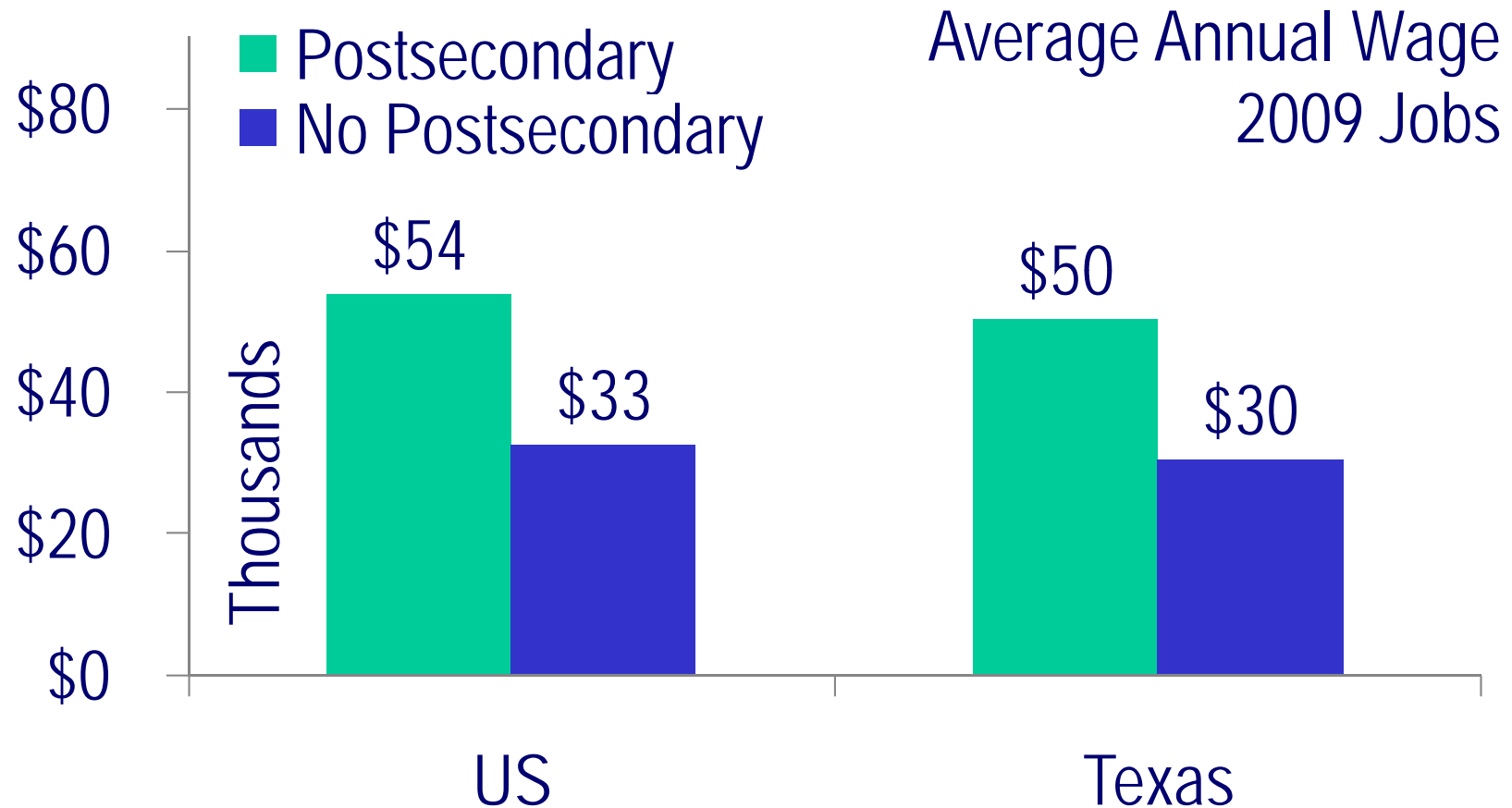


- Will renewable energy/clean technology emerge as a driver of economic growth?
- Will education and health care converge to form a new competitive advantage?
- How will city and county budgets affect regional economic development efforts?

2010: Continued focus on workforce/education



Why: degree holders earn 60% higher wages





CAPCOG: 2010 Priorities



Impact of Federal and State Initiatives on CAPCOG Region

Economic Development & Regional Planning



- CEDS Update
- Workforce Study
- Innovation Center
- Growth Assessment



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