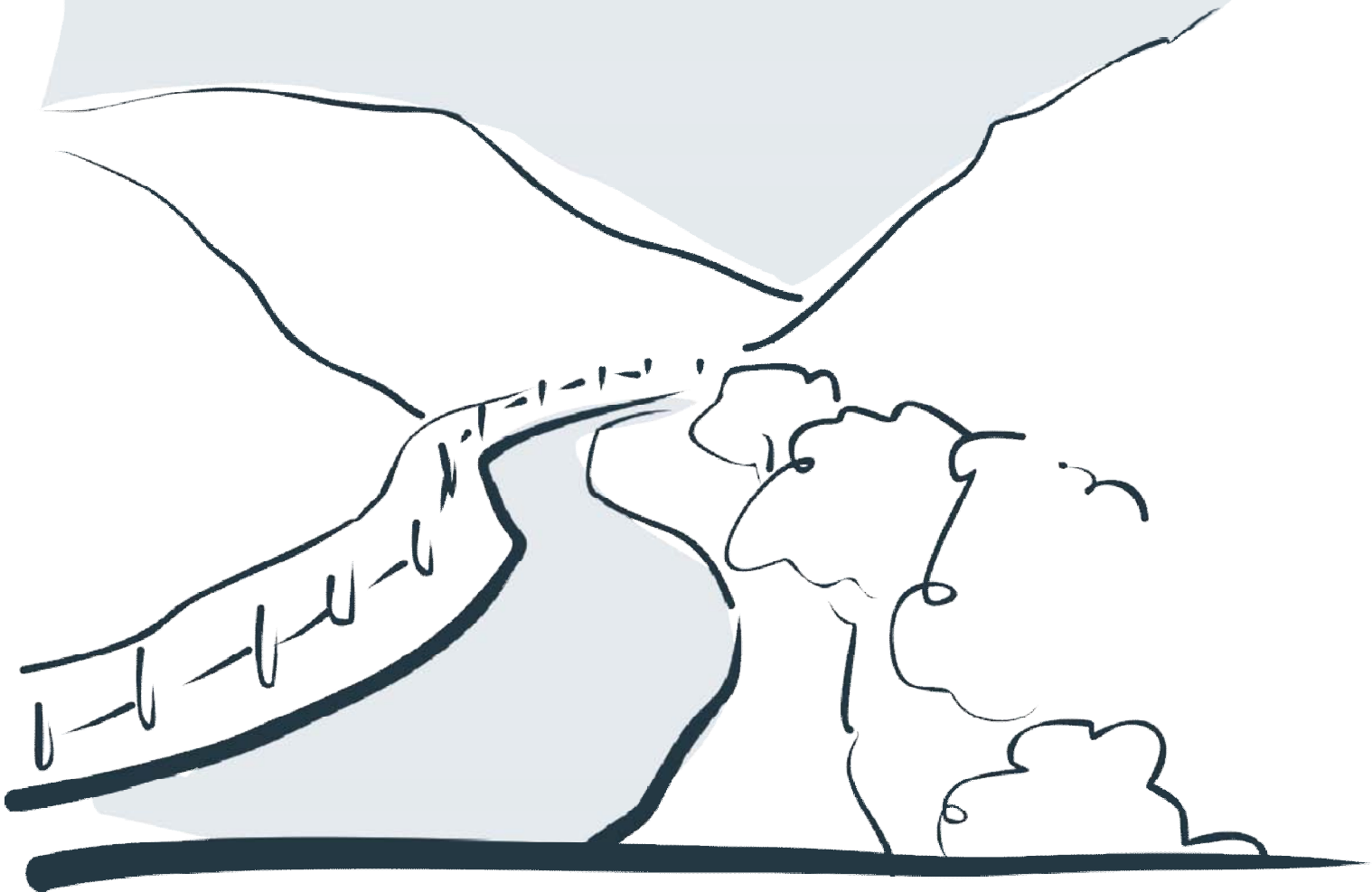


# Hays County Transportation Plan

## Technical Memorandum 3b

### Review of Existing Demographics

January 9, 2012





# HAYS COUNTY TRANSPORTATION PLAN

---

This page intentionally left blank.



# HAYS COUNTY TRANSPORTATION PLAN

---

## Contents

1.0	Existing Conditions.....	1
1.1	Demographics.....	1
1.1.1	Population.....	1
1.1.2	Employment.....	2
1.1.3	Journey to Work.....	4
1.2	Economic Development .....	5
1.3	Socioeconomic.....	5
1.3.1	Race .....	5
1.3.2	Income .....	6
1.3.3	Environmental Justice.....	7
1.4	Population and Employment Forecasts .....	8
1.4.1	Methodology.....	8
1.4.2	Demographics .....	9
1.5	Demographic Conclusions .....	9
1.6	Land Use .....	10
1.6.1	Existing Land Use.....	10
1.6.2	Future Land Use .....	11



# HAYS COUNTY TRANSPORTATION PLAN

---

## 1.0 Existing Conditions

Demographic and socioeconomic characteristics of Hays County were analyzed to understand how the County has changed over the past 20 years. This helps to describe the people who live and work in Hays County. This analysis will be used to determine the demand for transportation facilities and services in and around Hays County.

### 1.1 Demographics

#### 1.1.1 Population

Demographics are discussed based on several sources of data. Historic and existing United States Census data are used for basic population information. Local municipality websites were also reviewed for additional data. For additional data categories and projections, Capital Area Metropolitan Planning Organization (CAMPO) and the Texas State Data Center data were used to expand the picture of the demographics of Hays County and the region. This data was used for preparation of the CAMPO 2035 Regional Transportation Plan (2010). Population projections are discussed in Section 2.0.

Hays County is the third largest in the CAMPO region that also includes Travis, Williamson, Bastrop, and Caldwell counties. Hays County population is concentrated mostly along I-35 in the communities of San Marcos, Kyle, and Buda. Other communities in the County include Dripping Springs, Wimberley, Mountain City, Niederwald, Umland, Woodcreek, Hays, and Bear Creek.

Hays County had a population of 157,107 in 2010 (2010 Census). This was a 61 percent increase from 2000 to 2010. From 1990 to 2010, the County population has increased 139 percent. Hays County saw a significant population increase over the past decade. According to the Comprehensive Economic Development Strategy 2010 – 2015 report by Capital Area Economic Development District, 81 percent of the growth in Hays County came from net migration over the past decade. Only Williamson County grew at a faster rate during the same period in the region. Table 1 shows the population and household growth from 1990 to 2010.



# HAYS COUNTY TRANSPORTATION PLAN

Table 1. Hays County Demographics 1990 - 2010

	1990	2000	2010	1990-2000	2000-2010	1990-2010
Population	65,614	97,589	157,107	48.7%	61.0%	139.4%
Households	22,218	33,410	55,245	50.4%	65.4%	148.6%

Source: US Census Bureau, 1990 - 2010

Annually, Hays County has grown an average of 5.4 percent between 2000 and 2010 with the highest growth occurring 2001 and 2006 (Table 2). The annual growth has slowed to 2.8 percent in 2009 and 3.6 percent in 2010.

Table 2. Hays County Annual Population Growth

Year	Total Population	Annual Growth Rate
2000	97,589	4.9
2001	104,856	7.4
2002	110,938	5.8
2003	115,967	4.5
2004	120,586	4.0
2005	126,206	4.7
2006	133,913	6.1
2007	139,699	4.3
2008	147,555	5.6
2009	151,664	2.8
2010	157,107	3.6

Sources: 2001 – 2009 annual estimates from Texas State Data Center, Population Estimates; US Census Bureau, 2010

## 1.1.2 Employment

Employment in Hays County is concentrated in the City of San Marcos. Within the region, employment is centered in and around the City of Austin in Travis County to the north of Hays County and is mainly along the I-35 corridor.

According to the Texas Workforce Commission, Hays County had 81,186 people in the labor force in September 2010 (not seasonally adjusted). Of those, 75,800 were employed. Therefore, the unemployment rate for Hays County was 6.6 percent during the month of September 2010. This rate dropped 0.3 percent from 6.9 percent in September 2009.

The annual unemployment rate for Hays County in 2010 is estimated at 6.2 percent of the labor force (2010 American Community Survey 1-Year Estimates). The unemployment rate was 7.1 percent in 1990 and 6.3 percent in 2000 (US Census Bureau).



# HAYS COUNTY TRANSPORTATION PLAN

The industries with the highest employment in Hays County in 2010 include Educational Services, and Health Care and Social assistance; Retail trade; Arts, entertainment, and recreation services; and Professional services. Table 3 and Figure 1 show the employment distribution of industries and changes from 2000 to 2010.

Table 3. Hays County Employment by Industry

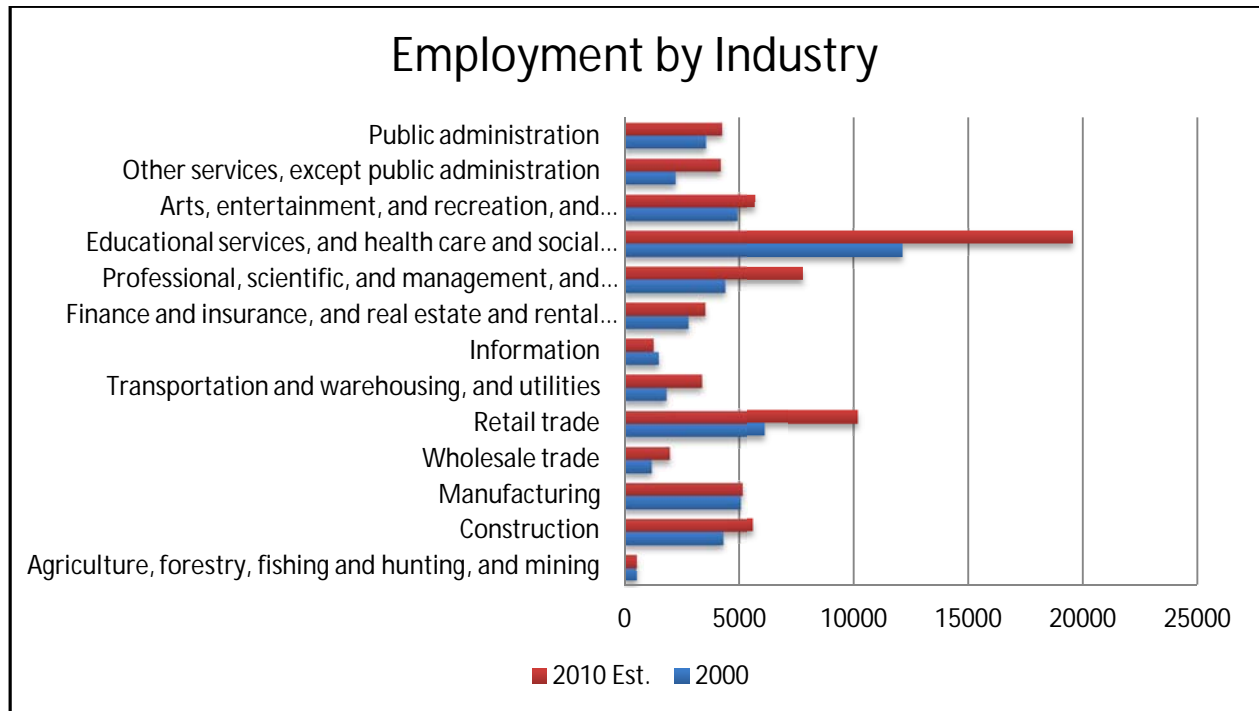
Industry	2000	2000 Percentage	2010 Est. *	2010 Est. Percentage
Civilian employed population 16 years and over	50,484	100%	73,010	100%
Agriculture, forestry, fishing and hunting, and mining	535	1.1%	559	0.8%
Construction	4,299	8.5%	5,608	7.7%
Manufacturing	5,035	10%	5,128	7.0%
Wholesale trade	1,192	2.4%	1,965	2.7%
Retail trade	6,118	12.1%	10,147	13.9%
Transportation and warehousing, and utilities	1,827	3.6%	3,375	4.6%
Information	1,508	3.0%	1,289	1.8%
Finance and insurance, and real estate and rental and leasing	2,777	5.5%	3,513	4.8%
Professional, scientific, and management, and administrative and waste management services	4,386	8.7%	7,780	10.7%
Educational services, and health care and social assistance	12,123	24.0%	19,514	26.7%
Arts, entertainment, and recreation, and accommodation and food services	4,915	9.7%	5,688	7.8%
Other services, except public administration	2,218	4.4%	4,192	5.7%
Public administration	3,551	7.0%	4,252	5.8%

\*2010 Estimates from American Community Survey 1-Year Estimates



# HAYS COUNTY TRANSPORTATION PLAN

Figure 1. Hays County Employment (2000 - 2010)



### 1.1.3 Journey to Work

Table 4 shows the number of workers in Hays County and where they travel to work. The majority of workers travel from their home in Hays County to other counties. Employment locations in the region are concentrated in Travis County within and around the City of Austin. Also, more people commute in to Hays County versus those both who live and work in Hays County. This shows a higher demand for transportation between Hays County and the rest of the region.

Table 4. Hays County Commuting Patterns - 2009

	Number	Percentage
Live and work in Hays County	15,903	27%
Live in Hays County, work outside	42,984	73%
Total employed Hays County residents	58,887	100%
Live outside Hays County, work inside	27,081	-

Source: US Census Bureau and Bureau of Labor Statistics



# HAYS COUNTY TRANSPORTATION PLAN

---

## 1.2 Economic Development

The largest employers in Hays County are Texas State University and the public school system. Hays County ranks third in the nation for job growth over the last 10 years (Tuesday, July 13, 2010; CNNMoney.com) with a reported 56.4 percent growth between 2000 and 2009. The following employers are the top 25 public and private employers in Hays County (Texas Workforce Commission, 2007):

- Butler Manufacturing Company
- Cabelas
- Central Texas Medical Center
- C-FAN
- City of San Marcos
- Compass Two LLC
- Dripping Springs Independent School
- Genlyte Thomas Group LLC
- Grande Communications Networks Inc
- Hays Consolidated Independent School District
- Hays County
- HEB Grocery Company LP
- Hunter Industries Ltd
- McCoy Supply
- MTC/GSA - Texas
- National Oilwell Varco
- San Marcos Consolidated Independent School District
- San Marcos Premium Outlets
- San Marcos Treatment Center
- Tanger Factory Outlet Center
- Telenetwork Partners Ltd
- Texas State University - San Marcos
- Thermon Manufacturing Company
- Wal-Mart Associates, Inc
- Wimberley Independent School District

## 1.3 Socioeconomic

### 1.3.1 Race

Table 5 shows the changes in race in Hays County since 1990. The Hispanic population has grown over the past 20 years with a significant increase between 2000 and 2010. The non-White, non-Hispanic population has grown its proportion of the total County population has remained constant. Figure 2 shows the distribution of race as a part of the total population since 1990.





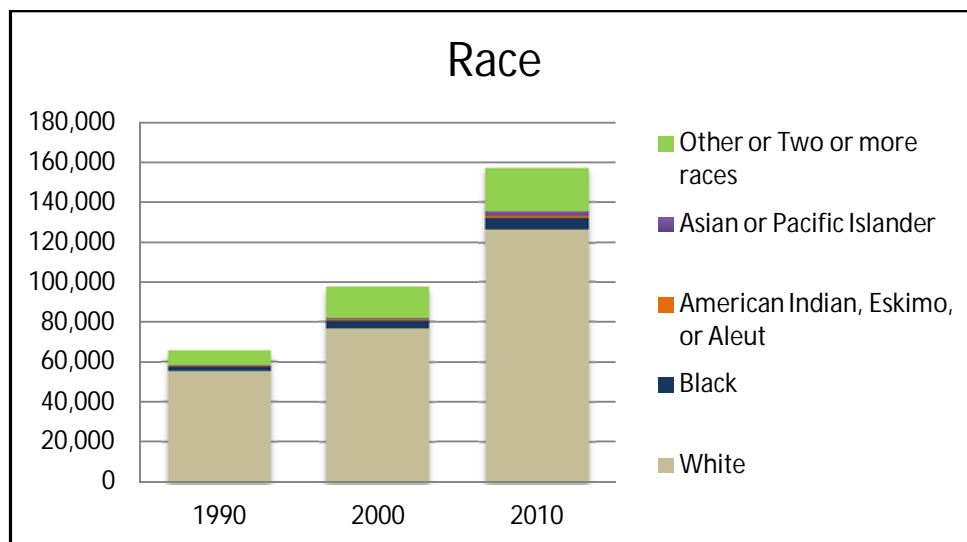
# HAYS COUNTY TRANSPORTATION PLAN

Table 5. Race and Hispanic Origin Trends within Hays County

	1990 (Percentage of Total)	2000 (Percentage of Total)	2010 (Percentage of Total)
Total Population	65,614	97,589	157,107
White	55,360 (84.4%)	77,014 (78.9%)	126,712 (80.7%)
Black	2,220 (3.4%)	3,588 (3.7%)	5,536 (3.5%)
American Indian, Eskimo, or Aleut	230 (0.4%)	678 (0.7%)	1,224 (0.8%)
Asian or Pacific Islander	427 (0.7%)	841 (0.9%)	1,958 (1.3%)
Other or Two or More Races	7,377 (11.2%)	15,458 (15.8%)	21,677 (13.8%)
Hispanic (of any race)	18,249 (27.8%)	28,859 (29.6%)	55,401 (35.3%)

Source: US Census Bureau

Figure 2. Hays County Race Distribution



### 1.3.2 Income

Median annual household income levels in Hays County have increased over the past 10 years increased from \$45,006 in 2000 to \$57,332 in 2010. The percentage of households with an income greater than \$100,000 is increasing while total households with an income less than \$50,000 are decreasing. Table 6 shows the distribution of household income for Hays County in 2000 and 2010.

Poverty levels in Hays County have dropped from 1990 (20.9 percent) to 2010 (15.4 percent). Based on year 2010 estimates, the poverty level has increased only slightly since 2000 from 14.3 percent to 15.4 percent.



# HAYS COUNTY TRANSPORTATION PLAN

Table 6. Hays County Household Income – 2000 - 2010

	2000 Total	Percentage	2010 Total	Percentage
Total households	33,465	100	54,422	54,422
Less than \$10,000	3,372	10.1	5,005	9.2%
\$10,000 to \$14,999	2,004	6	3,619	6.6%
\$15,000 to \$24,999	3,758	11.2	5,004	9.2%
\$25,000 to \$34,999	3,952	11.8	4,001	7.4%
\$35,000 to \$49,999	5,438	16.2	6,544	12.0%
\$50,000 to \$74,999	6,662	19.9	10,806	19.9%
\$75,000 to \$99,999	3,966	11.9	5,998	11.0%
\$100,000 to \$149,999	2,921	8.7	8,283	15.2%
\$150,000 to \$199,999	782	2.3	2,811	5.2%
\$200,000 or more	610	1.8	2,351	4.3%
Median household income (dollars)	\$45,006	-	\$57,332	-

Source: American Community Survey 1-Year Estimates (in 2010 inflation –adjusted dollars)

### 1.3.3 Environmental Justice

Executive Order 12898 (*Federal actions to Address Environmental Justice in Minority Populations and Low Income Populations*, issued February 11, 1994) requires federal agencies to identify and address disproportionately high and adverse health and environmental effects of their programs and policies on minority and low income populations. Definitions of these populations include:

- Low-income is defined as a household with income at or below the Department of Health and Human Services poverty guidelines.
- Minority is defined as a person who is Black, Hispanic, Asian American, American Indian, or Alaskan Native.

Environmental justice populations are those that have any of the following characteristics: At least 50 percent of the population lived in families earning less than 80 percent of the county median family income; at least 50 percent of the population was a minority; or at least 25 percent of the population fall below the federal poverty level (2035 CAMPO Regional Transportation Plan, May 2010). Traffic analysis zones with environmental justice populations are located in the south and southeastern portion of the county.

The 2035 CAMPO Plan identified affordable housing locations in 2010 which were in urban areas of the County. Affordable housing identified in the 2035 Plan refers to public subsidized housing. Concentrations of affordable housing were in the cities of San Marcos and Kyle. Locations were also noted in Buda and Dripping Springs.



## 1.4 Population and Employment Forecasts

### 1.4.1 Methodology

Projections by CAMPO and the Texas State Data Center were reviewed for this discussion. The demographic projections analyzed are based upon the baseline population and employment figures used by the Capital Area Metropolitan Planning Organization (CAMPO) in preparation for the *2035 Regional Transportation Plan Update (RTP)*. Forecasts were developed for the years 2005, 2015, 2025, and 2035.

For 2035 Plan, CAMPO considered projections prepared by the Texas State Data Center and the State Demographer under two growth scenarios. Growth scenario 1, or the “high-growth” scenario, assumes that trends in age, sex and race/ethnicity net migration rates of the 1990s will continue into the future. The 1990s were a period of rapid growth throughout the state, especially in the Capital Area Council of Government (CAPCOG) region, and since it is unlikely that these rates will be sustainable in the long term, this scenario is considered to be “high growth.” Growth scenario 0.5 assumes migration rates will be one half of what was experienced in the 1990s. In developing population projections for the greater Austin area, CAMPO computed an average of these two scenarios and rounded the resulting number to the nearest 100. Baseline populations used for projections consisted of four race/ethnicity groups, age, and sex net migration rates. Special populations, such as military and students which do not typically reside in a location over a longer period of time, were removed from the base populations used to develop projections.

The Texas State Data Center updated their projections using trends from the post-2000 census and other databases. A 2000-2007 migration scenario was used to take into account post-2000 population trends. This scenario is a mix of both reduced levels of net migration and greater growth than the 1990s. Texas experienced both of these types of growth.

The demographic scenario that forms the basis for the CAMPO 2035 RTP assumes that the region will work toward implementation of the Centers map and growth accommodation targets by 2035. Compared to the CAMPO projections presented in the 2035 RTP update, the state data is slightly higher. The CAMPO projections are a better fit for long-term planning from 2000 through 2040 since they are lower than the high growth scenario. The CAMPO 2015, 2025, and 2035 forecasts are considered reasonable forecasts. The employment projections from CAMPO should be used only for long-range planning since the estimate made in 2005 for 2010 employment is lower than the actual 2010 Census employment total.



# HAYS COUNTY TRANSPORTATION PLAN

## 1.4.2 Demographics

Table 7 shows population and employment forecasts based on TAZ data. Hays County forecast population shows a 144 percent increase from 2010 to 2035.

Table 7. Population and Employment Projections

	2010	2015	2025	2035
Population	157,107	189,153	271,593	371,245
Households	55,245	66,535	96,515	132,751
Employment	73,010*	66,200	97,800	137,300

Sources: 2010 US Census and CAMPO traffic analysis zones

\*2010 Estimate from American Community Survey

Future population density maps developed by CAMPO show population concentrated in the cities along I-35 in Hays County. Higher population densities are projected to occur in San Marcos and Kyle. The person per acre density is expected to stay below a two persons per acre throughout the rest of the County.

Future employment density data provided by CAMPO also shows employment expanding in the same areas as future population. Employment is projected to be concentrated in the cities along I-35.

## 1.5 Demographic Conclusions

The data in this section are used to provide an understanding of the demographic characteristics of Hays County. Items to note include the following:

- The population in Hays County has grown significantly in the past decade and at a greater rate than the state of Texas.
- Growth is expected to continue and concentrate along the I-35 corridor.
- Environmental justice populations are concentrated in the urban areas of the County.
- The Hispanic population grew significantly from 2000 to 2010.
- Employment is expected to increase through the next 20 years but at a slower rate than the population.
- The majority of workers residing in Hays County commute to work outside the County. However, more people commute into Hays County than those who live and work in the County.
- Educational services, and Health Care and Social assistance; Retail trade; Arts, entertainment, and recreation services; and Professional services account for half of the employment sectors in the county.



## 1.6 Land Use

### 1.6.1 Existing Land Use

Hays County is characterized by urban land uses concentrated along the I-35 corridor with mostly rural land uses throughout the rest of the County. New urban land uses have increased in the County on the fringe of existing urban land uses. Agricultural loss has occurred because of the development trend. Urban uses are concentrated along I-35 in the cities of San Marcos, Kyle, and Buda. San Marcos is located approximately 26 miles south of Austin and development has occurred between the cities in lower-density type of development. Several designated parks and open spaces are located throughout the County. Due to the topography and lack of water for development in the western portion of the County, more open space land uses are prevalent.

Single-family residential and industrial uses are located in the northern and southern portion of the City of San Marcos. There are also large amounts of vacant land in the northern and southern areas. Mixed uses are concentrated in the San Marcos Central Business District. Non-residential uses are located near the I-35 corridor. Retail uses in San Marcos are present along I-35. Large outlet malls and the Central Texas Medical Center are located in the southern portion of the City. The western portions of the City include a mix of single-family and multi-family residential uses. Open spaces uses are located throughout the City and along the San Marcos River. A concentration of institutional uses is the Texas State University, located west of I-35 in San Marcos (*San Marcos Horizons Sector Plans, Technical Updates, 2007*).

The City of Kyle is characteristic of a bedroom community with several residential subdivisions. Commercial and mixed use development is concentrated along the I-35 corridor. Retail land uses are found in the city's historic downtown. Limited commercial development uses are found outside of the I-35 corridor. The remainder of the City is mostly single-family residential uses that were formed from the conversion of agricultural land (*Kyle Comprehensive Plan, 2010*).

The City of Buda has primarily rural and suburban development patterns. Buda is also characteristic of a bedroom community with mostly residential land uses surrounding commercial development along the I-35 corridor. Industrial land uses are located in the southwestern portion of the City. Agricultural uses are located at the edge of urban uses. The dominant land uses within the City of Buda include single-family and multi-family residential and vacant land. These uses account for over half of the land uses in the City. Commercial (office and retail) also accounts for nearly 17 percent of the land use in the City. Agricultural and industrial uses are more widespread in areas outside of the City of Buda limits. (*Buda 2030 Comprehensive Plan, adopted October 2011*).

Dripping Springs is a predominantly residential community with its retail and commercial uses focused on US Highway 290 (US 290) and Ranch Road 12 (*The City of Dripping Springs Comprehensive Plan, 2010*). Commercial and retail uses are located on US 290. The majority of developed land in Dripping Springs is residential, with most being low-density single-family residential. Several large parks are located in the City.



# HAYS COUNTY TRANSPORTATION PLAN

---

Within the city limits of Wimberley, large-lot residential development makes up the majority of the city. Commercial land uses and denser development is located in the City Center. Land use has historically evolved into mixed-uses. Development patterns in the City are characteristic of small-scale development (*City of Wimberley Comprehensive Plan*, July 2008).

## 1.6.2 Future Land Use

As Hays County continues to grow, more development is expected to occur near urban areas and oriented north along the I-35 corridor towards the City of Austin. Land conservation opportunities have been identified for the region to preserve areas from new development (*Central Texas Greenprint for Growth Overall Conservation Opportunities, Hays County, Trust for Public Land, 2009*). In Hays County, conservation opportunities are the highest west of the cities along the I-35 corridor and moderate in the western-most portions of the County. Since the south and southeastern portions of the County are more developed, less conservation opportunities are available here.

Future land use plans in San Marcos show industrial and commercial development along the I-35 corridor (*City of San Marcos Future Land Use Map, January 2010*). Future land use is planned to be mostly low-density residential in the City of San Marcos. Open space, industrial, and commercial uses would be the next most common uses, respectively in the city (*San Marcos Horizons Sector Plans, Technical Updates, 2007*).

The majority of the City of Kyle's future land use is designated for single family residential uses, with some areas for apartments, manufactured housing, and multifamily residential uses. Retail and service uses are generally limited to narrow strips along main roadways, along with warehouse and manufacturing uses. Some land has been identified for parks, open space, and hike and bike trails (*Kyle Comprehensive Plan, 2010*).

Future land use in the City of Buda concentrates commercial along I-35, industrial uses to the southwest, growth to the east, and "green" growth to the west to preserve land. Future land use in Dripping Springs is planned to let future growth enhance the existing land uses rather than encourage new growth.