

**Notice of Meeting for the  
2030 Comprehensive Plan Update Committee  
of the City of Georgetown  
August 15, 2019 at 6:00 PM  
at Community Room, City Hall, 808 Martin Luther King Jr Street, Georgetown, TX  
78626**

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**Legislative Regular Agenda**

- A Consideration and possible approval of the minutes from the August 1, 2019 2030 Update Steering Committee.
- B Presentation and discussion of draft land use policies and categories. - Nat Waggoner, AICP, PMP, Long Range Planning Manager
- C Mapping Exercise. – Nat Waggoner, PMP, AICP, Long Range Planning Manager
- D Public Comment
- E Next Meeting Date/Time/Agenda

**Adjournment**

Adjournment

**Certificate of Posting**

I, Robyn Densmore, City Secretary for the City of Georgetown, Texas, do hereby certify that this Notice of Meeting was posted at City Hall, 808 Martin Luther King Jr. Street, Georgetown, TX 78626, a place readily accessible to the general public as required by law, on the \_\_\_\_\_ day of \_\_\_\_\_, 2019, at \_\_\_\_\_, and remained so posted for at least 72 continuous hours preceding the scheduled time of said meeting.

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Robyn Densmore, City Secretary

City of Georgetown, Texas  
2030 Comprehensive Plan Update Committee  
August 15, 2019

**SUBJECT:**

Consideration and possible approval of the minutes from the August 1, 2019 2030 Update Steering Committee.

**ITEM SUMMARY:**

**FINANCIAL IMPACT:**

N/A

**SUBMITTED BY:**

Nat Waggoner, PMP, AICP

**ATTACHMENTS:**

<b>Description</b>		<b>Type</b>
□	Meeting Minutes	Backup Material



Minutes of Meeting of the  
2030 Comprehensive Plan Update Steering Committee  
City Hall, Community Room  
808 Martin Luther King, Jr., St. Georgetown, Texas 78626  
Thursday , August 1, 2019 6:00 pm

In attendance: Mayor Dale Ross; Ercel Brashear; Josh Schroeder; Lou Snead; Linda McCalla; Danelle Houck; Suzy Pukys; Paul Secord; Doug Noble; Tommy Gonzalez; Scott Stribling; Wendy Cash

Staff present: Sofia Nelson; Nat Waggoner; David Morgan; Wayne Reed; Mirna Garcia; Michael Patroski; Chelsea Irby; Seth Gipson

Regular Session –

Mayor Dale Ross called the meeting to order at 6:00 pm.

- A. Consideration and possible approval of the minutes of the Steering Committee meeting on July 22, 2019. – Mirna Garcia, Management Analyst

**Motion by Gonzalez to approve the minutes, second by Brashear. Approved unanimously (12-0).**

- B. Presentation and discussion of draft land use policies – Nat Waggoner, Long Range Planning Manager

Item Summary: At the 7/22/2019 meeting, staff led the 2030 Committee through an interactive exercise to generate solutions to address land use challenges. The Steering Committee was first asked, “What are the things we can do as a City to address the issues you identified?” Like solutions were grouped and then named. Seven (7) solution groups emerged: Green Space, Collaboration, Flexibility in Development Patterns, Transportation, Housing Diversity, Economic Development, Intentional Infrastructure. At this meeting, the staff presented a draft of the land use policies based on the input of the Steering Committee and asked members: Does the draft policy capture your idea?; Do that draft land use policies accomplish these goals?; Is there anything you said which we did not capture?; Are there any missing policies?

Summary of Discussion: Waggoner provided an overview of how the policies were drafted. With input from the Steering Committee, and revision of the policies created in 2008, staff evaluated the draft policies against 2030 goals. Waggoner explained the goals and draft policies created for each goal.

The discussion consisted of further defining terms in the policies, to better capture the intent of the policies. As each goal was reviewed, Waggoner asked for the Committee’s feedback and whether staff accurately captured their thoughts with the draft policies. Committee members provided input on making changes to verbiage of the policies.

- C. Presentation and discussion on land use categories. – Nat Waggoner, AICP, PMP, Long Range Planning Manager

Irby presented on the land use categories and provided an overview to the Steering Committee of the feedback staff is seeking. She also discussed upcoming steps and action items regarding the land use element. Irby reviewed residential, nonresidential, and mixed-use categories of land use, and asked the Committee for their thoughts on how to better define these categories.

Nelson reminded Committee members about the next steps. The following meeting will be on August 15<sup>th</sup>.

D. Public Comment

Larry Olson made a comment regarding the land use map and needing transition areas between residential and commercial areas and looking at this issue city-wide.

Michael Spano also made a comment regarding mining land use. He lives near a quarry, and when there are issues, the residents in the area have to contact the federal government because the county and State of Texas do not regulate quarries. He asks the Committee and staff to keep this in mind when working on mining land use.

E. Next Meeting Date/Time/Agenda – Sofia Nelson, Planning Director

Next meeting August 15, 2019

Adjournment – Motion for adjournment by Gonzalez, second by Stribling.  
Meeting was adjourned at 7:32pm.

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Approved, Mayor Dale Ross

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Attest,

City of Georgetown, Texas  
2030 Comprehensive Plan Update Committee  
August 15, 2019

**SUBJECT:**

Presentation and discussion of draft land use policies and categories. - Nat Waggoner, AICP, PMP, Long Range Planning Manager

**ITEM SUMMARY:**

1) Staff will provide the Steering Committee a summary of the changes to the land use policies based on direction provided by the Steering Committee at their 8/1 meeting. Staff will also provide a summary of the recommended changes to the Future Land Use Categories.

**FINANCIAL IMPACT:**

N/A

**SUBMITTED BY:**

Nat Waggoner, PMP, AICP

**ATTACHMENTS:**

<b>Description</b>		<b>Type</b>
<input type="checkbox"/>	Exhibit 1- Revised Land Use Policies	Exhibit
<input type="checkbox"/>	Exhibit 2 - Land Use Policies (2008)	Exhibit
<input type="checkbox"/>	Exhibit 3- Future Land Use Map (2008)	Exhibit

#	Policy	Public Input	Technical Studies	Possible Tools	Specific Example	Solution Group	Outcome	Role
2030 Goal 1: Promote development patterns with balanced land uses that provide a variety of well-integrated housing and retail choices, transportation, public facilities, and recreational options in all parts of Georgetown.								
1.A.	Encourage a balanced mix of residential, commercial, and employment uses at varying densities and intensities, to reflect a gradual transition from urban to suburban to rural development.	"A well balanced mixture of housing and commercial enterprises." (2030 Plan Update Survey #1)  "Maintain existing neighborhoods and downtown areas. Expand with mixed-use and a variety of housing types/sizes." (2030 Plan Update Survey #1)	Overlays, transition zones (Downtown Master Plan), Corridor Plans (Williams Drive)	UDC amendments	Ensure proper transitions and buffering between established neighborhoods and adjacent commercial and manufacturing areas.	Flexibility in Development Patterns	Diversify tax base and concentrate development; Balance Supportive Uses	Lead
1.B.	Promote more compact, higher density, well-connected development within appropriate infill locations.	"Higher density, new urbanistic downtown that is walkable and fully developed..." (2030 Plan Update Survey #1)	Land Use element - FLU map and categories	Future Land Use Categories and UDC amendments - improved standards for commercial development	Establish standards appropriate for new residential development pertaining to lot sizes, open space, buffers, road connectivity, etc. Ensure that development is compatible in character with the surrounding context. UDC amendments for buffering adjacent to residential neighborhoods. Apply neighborhood conservation strategies, such as code enforcement, housing rehabilitation, and support for urban homesteading for first time buyers.	Intentional Infrastructure Transportation Mapping Strategies	Use infrastructure to promote desired development patterns	Lead
2030 Goal 2: Reinvest in Georgetown’s existing neighborhoods and commercial areas to build on previous City efforts.								
2.A.	<del>Remove barriers to</del> Encourage redevelopment in target areas.	"I think current businesses should be updated, like the old HEB on University and 35 is gross, moldy, and a huge health concern." (2030 Plan Update Survey #1)	Land Use element	UDC amendments Utility Master Plan Small Area Planning Capital Improvement Planning	Review standards for impervious cover, parking, height Incentivize redevelopment in target areas through infrastructure	Intentional Infrastructure	Utilize existing infrastructure and support vibrant places	Lead
<del>2.C.</del> 2.B.	Identify potential opportunities and selectively target, plan, and promote development/reuse initiatives.	"Revitalized neighborhoods continued, beautification and community pride increased." (2030 Plan Update Survey #1)	CIP, Williams Drive, Housing Element	Small Area Planning Special Districts (Business Improvement Districts/Tax Increment Reinvestment Zones-TIRZs)	Identified areas could qualify for additional infrastructure improvements, development/renovation incentives, additional flexibility in development regulations to encourage redevelopment.	Economic Development	Preserve and enhance existing neighborhoods	Lead
2030 Goal 3: Provide a development framework that guides fiscally responsible growth, protects historic community character, demonstrates stewardship of the environment, and provides for effective provision of public services and facilities.								
<del>2.D.</del> 3.A.	Continue to promote diversification of uses while strengthening the historic character and supporting the existing historic neighborhoods.	"Keep Georgetown's historic style while improving the city." (2030 Plan Update Survey #1)  "A community with diverse options for housing, transportation, and work. Maintain small town feel where possible." (2030 Plan Update Survey #1)	Downtown Master Plan; Vision Statement - "Georgetown: A caring community honoring our past and innovating for the future"	FLU categories, zoning, incentives	Review permitted uses in downtown to ensure sufficient variety	Economic Development Mapping Strategies	Support existing neighborhoods	Lead
New	Strengthen Georgetown’s image and identity as a small town quality feel within enhanced gateways and commercial corridors.	"I would hope that it still has a small town feel." (2030 Plan Update Survey)  "If you're concerned about gateways, keep Georgetown's appearance that of a small town." (Gateways MQ)	Williams Drive Study, Gateways, CIP	Special Districts Development Agreements Zoning Small Area Planning  Implement landscaping and other design regulations to improve corridor aesthetics.	- Add/increase funding for beautification of specific areas along Gateways through WilCo Master Gardeners, scout groups, etc. - Renegotiate TxDOT ROW beautification Agreement to ensure better maintenance and standards - Designate 5% of project cost of all new roadway improvements associated with the gateway corridors to be applied to landscape and road frontage beautification	Economic Development Intentional Infrastructure	Support Georgetown's unique identity	Lead

#	Policy	Public Input	Technical Studies	Possible Tools	Specific Example	Solution Group	Outcome	Role
New	Proactively <b>support existing</b> and recruit new employers and incentivize development that is consistent with Georgetown's target industries and that support diversification of the City's tax base <b>and promote economic development.</b>	"...diversity of business (large and small), include industry for local employment, cater to start ups and innovative research and development..." (2030 Plan Update Survey #1)  "I would like see Georgetown become the scouting city for major employers..." (2030 Plan Update Survey #1)	Target Industry Analysis - target industries and potential partners; ED Strategic Plan - Strategic Goal 1: Support existing businesses and industries.; Strategic Goal 2: Enhance targeted recruitment of identified industries.; Strategic Goal 3: Diversify workforce development and recruitment initiatives.	Business Improvement Districts Small Area Planning Utility Master Plan 4a & 4B sales tax initiatives Capital Improvement Plan (CIP)	Coordination of Land use plan & Georgetown Economic Development Corporation (GEDCO) Strengthen relationship with Georgetown Development Alliance	Economic Development Collaboration Intentional Infrastructure	Diversify tax base and provide employment	Partner
New	Adopt development practices that <del>promote economic development</del> and <b>preserve and enhance the environment.</b>	"A city that prioritizes the environment with rich renewable energy incentives (residential and commercial) and land/wildlife preservation." (2030 Plan Update Survey #1)	Water Conservation Plan - "The City of Georgetown has a long standing commitment to water conservation and the efficient use of our natural resources."	Water Conservation Plan Stormwater Master Plan Solid Waste Master Plan Construction Standards and Specifics Manual Educational and incentive programs; UDC amendments	Low Impact Development Standard Water conservation, energy conservation, air/water quality, compact/walkable development, urban heat island, support existing initiatives.	Intentional Infrastructure Green Space	Reduce environmental impact	Lead
New	Develop and apply approval standards for annexation and creation of special districts.	"Please do not listen to the naysayer, and do not limit growth! Be progressive in your growth, but use good zoning in the process." – Survey 1  "I know that we are going to grow, but I don't want that growth to eclipse the character that we enjoy now." – Survey 1  "Strongly continue this small town environment, not to grow so large with what appears to be adhoc development like Round Rock and Cedar Park." – Survey 1  "It's growing so fast. Hate to lose the small town feel." – Survey 1  "While growth is inevitable, I'd like to see it balanced with larger considerations of overall quality of	State of the City - expansion of city limits & ETJ acreage since 2008	Fiscal Impact Model (Cost to serve) MUD/PID Policies Utility Master Plan - waste water requirement UDC Criteria for Annexation	Outside of existing development pattern, are we accepting annexation proposals that meet specific City objectives? Density and development cannot happen without utility provision, primarily waste water.	Intentional Infrastructure Collaboration	Intentional growth that meets land use and economic development strategies	Lead
2030 Goal 6: Ensure access to diverse housing options and preserve existing neighborhoods, for residents of all ages, backgrounds and income levels.								
<del>4. E.</del> 6. A	<del>Expand regulatory provisions and incentives to</del> Encourage innovative forms of compact, pedestrian friendly development and a wider array of affordable housing choices through <b>provisions and incentives.</b>	"Enhance walkability with wider sidewalks or independent bike trail integration." (RoundTable - Stakeholder Feedback)  "We have a need for affordable housing. People are moving here and we need to ensure everyone is welcome. Right now, that is not the case." (2030 Plan Update Survey #1)	Williams Drive Study, Land Use Element, Housing Element	Mixed uses in FLU categories Zoning standards (UDC amendments) Sidewalk Master Plan Small Area Planning	Adopt ratios of preferred land use mixes	Housing Diversity Intentional Infrastructure Green Space	Provide more housing options and support vibrant places	Lead
2030 Goal 7: Maintain high-quality infrastructure, public safety services, and community facilities.								



#	Policy	Public Input	Technical Studies	Possible Tools	Specific Example	Solution Group	Outcome	Role
New	Support public safety services and <del>community-facilities infrastructure</del> to ensure that Georgetown continues to be a safe, <del>family-friendly</del> <b>welcoming</b> community <del>which that</del> serves all residents.	"Continue providing safety thru the fire and police departments." (2030 Plan Update Survey #1)	OTP - pedestrian and bike planning; GUS mission statement - "To provide safe, reliable, efficient and cost-effective utility services to customers in order to enhance the quality of life of the community"	Georgetown Americans with Disabilities Act (ADA) Plan Public Safety Plan Emergency Management Plan Stormwater Master Plan CIP/annual budget; ensure that public safety services funding increases with population growth	Update Emergency Management Plan to reflect new organizational structure, update to meet new community needs Complete a So Evaluate emergency response staffing as a function of growth	Intentional Infrastructure	Maintain quality of life	Lead
2030 Goal 8: Actively partner with GISD, Williamson County, other governmental agencies, and local organizations to leverage resources and promote innovation.								
New	Promote development decisions that serve the needs of <del>Georgetown Independent School District and Williamson County</del> <b>our interlocal government partners.</b>	"Wider sidewalks near Gtown high school leading into downtown (6-8 ft.)" (Downtown RoundTable)	Alignment; GISD Strategic Plan - "Collaborative environments that give voice and offer ownership to stakeholders are essential to meeting current and future needs."; Citizen Participation Plan: "Goal 3: Enhance our relationships and communication with community organizations"	Incorporate Institutional Facilities on FLU. Include in special districts and development agreements. Trigger for coordinated discussion with GISD (see San Antonio for subdivisions of 200 lots or greater)	Joint Use Agreements, connectivity to/from the school	Collaboration Intentional Infrastructure	Maximize resources and foster effective partnerships	Partner
2030 Goal 9: Maintain and add to the existing quality parks and recreation.								
New	Ensure that the subdivision and development process includes consideration of the way in which residential lots relate to parks and open space, emphasizing adjacency and accessibility to parks and open space.	"Strong, robust parks system for families to enjoy." (2030 Plan Update Survey #1)  "Walkable, lots of trails connecting parks and neighborhoods, access to shopping for walkers and bicyclists, great schools, prioritizing green space." (2030 Plan Update Survey #1)	Parks, Rec, and Trails Master Plan - incorporate in future update	UDC amendments	Prohibit lots from backing to public/shared open space; single-loaded streets are more desirable for access and to reduce risk of creek erosion into private property.	Green Space Intentional Infrastructure	Maximize parks and open spaces and support property values	Lead
2030 Goal 10: Improve and diversify the transportation network.								
<del>2-B</del> 10.A	Proactively plan investments in transportation and other infrastructure to leverage partnerships with the business community and interested neighborhood organizations and maintain the level of service as the City continues to grow.	I would love to see much improvement and planning of traffic patterns." (2030 Plan Update Survey #1)  "With the expected growth in Georgetown there needs to be related expansion of the transportation infrastructure . Continue to bring in restaurants, larger hotels and entertainment." (2030 Plan Update Survey #1)	ED Strategic Plan - Strategic Goal 4: Encourage speculative development  OTP, Utilities Master Plan, CIP; GUS mission statement - "To provide safe, reliable, efficient and cost-effective utility services to customers in order to enhance the quality of life of the community."	CIP/annual budget	Project funding prioritized in targeted areas/ED purposes	Intentional Infrastructure Transportation	Utilize infrastructure as an economic development tool	Lead

## LAND USE CATEGORIES

### *Residential Use*

The residential land use categories on the Future Land Use Map designate areas that are intended to be used in the future for residential development. While, in some cases, residential uses may already exist—and will remain in the future—in other cases the land is presently undeveloped and subject to future rezonings for residential development. The residential categories defined below are intended to accommodate a variety of housing types, the variety of household types and sizes, housing preferences, and income levels among the population. These housing types include single-family detached and attached dwellings (such as duplexes and townhomes), and various forms of multi-family housing, both rental units and condominiums. Rural residential developments are also included under this heading, since the land is primarily committed to residential use.

The density ranges in these land use categories are provided in terms of dwelling units per gross acre. It is recommended that the City similarly adopt a density-based zoning system to regulate residential concentrations in the zoning districts corresponding to these land use categories, instead of imposing lot size requirements as the zoning structure does today.

These categories typically include supportive uses such as schools, churches, parks and may include neighborhood-serving commercial uses that are not depicted on the Future Land Use Map. An important consideration for these uses is to ensure that they are as compatible as possible with the adjacent residential use.

### **Agricultural / Rural Residential**

This broad land use designation is intended to accommodate very low levels of population, retain rural character and require a very limited array of public services.

This category applies in areas that are located outside the present city limits and are part of the proposed Tier Growth 3 (Long-Term Growth Area). Generally, such designations represent a “holding zone” for land areas prior to their future development for more intense urban development following annexation. Rural subdivisions, particularly conservation developments that protect open space in perpetuity, may be considered permanent uses in some circumstances.



*Conservation subdivision*

This land use designation is regulated, to some extent, by the UDC, as granted by the State of Texas. The more limited “agricultural” designation is intended to retain the viability of agricultural areas and uses involving grazing of livestock or crop production, while accommodating minimal levels of population growth consistent with agricultural operations. The “rural residential” designation, on the other hand, is intended to permit low density residential uses, consistent with rural character, but not necessarily retaining agriculture.



*Rural commercial use*

In such areas, conservation developments which preserve substantial open space by clustering development in smaller lots are strongly encouraged here over conventional “large lot” development. In addition, for new subdivisions created adjacent to agricultural operations that use generally acceptable management practices, a “right-to-farm” easement should be considered to require acknowledgement by new residents that nearby agricultural operations will generate noise, odors, light, dust, and other impacts.

Some commercial uses are anticipated to occur in this district. Such uses, however, should be limited to retail and service functions that meet the needs of a rural population and the operational needs of agriculture.

### **Low-Density Residential**



*Single family home*

This category includes the city’s predominantly single-family neighborhoods that can be accommodated at a density between 1.1 and 3 dwelling units per gross acre. Conservation subdivisions are also encouraged in this land use district. Modifications to development standards applicable to this category could address minimum open space requirements, public facility impacts, and greater roadway connectivity.

This category may also support complementary non-residential uses along arterial roadways such as neighborhood-serving retail, office, institutional, and civic uses, although such uses may not be depicted on the Future Land Use Map. Standards should be established to maximize compatibility of these uses with adjacent land uses, minimize traffic congestion and overloading of public infrastructure, and also ensure a high standard of site, landscape, and architectural design.



*Small lot residential*

### **Moderate-Density Residential**



*Townhomes*

This land use category comprises single family neighborhoods that can be accommodated at a density ranging between 3.1 and 6 dwelling units per gross acre, with housing types including small-lot detached and attached single-family dwellings (such as townhomes).

As in the preceding category, the Moderate-Density Residential category may also support complementary non-residential uses along arterial roadways such as neighborhood-serving retail, office, institutional, and civic uses, although such uses may not be depicted on the Future Land Use Map. Standards should be established to maximize



compatibility of these uses with adjacent land uses, minimize traffic congestion and overloading of public infrastructure, and also ensure a high standard of site, landscape, and architectural design.

This category includes most of the land area known as “Old Town.” This area is planned to remain predominantly residential and, although this Plan calls for greater density and infill in Old Town over time, the utility plans for the area are currently anticipated for mostly moderate-density development. The reason Old Town is in the Moderate Density Residential category is because it fits the historic pattern of the area. The Plan does not seek widespread increases in density or changes in land use that differ from present-day Old Town. Yet Old Town, like the Downtown area, is expected to face some increase in density, provide a greater mix of uses in the future and redevelop completely in certain areas. The historic nature of the buildings, street patterns, natural resources, etc. will continue to be an important part of Georgetown and a concerted effort to increase the utility capacity in this area would have to take place for any significant changes to occur.



*Duplexes*

### **High-Density Residential**

This category provides for residential uses developed at a minimum density of 6.1 dwelling units per gross acre. These higher density areas provide opportunities to diversify the housing stock by accommodating dwelling types that still maintain a compatible neighborhood scale and character, such as patio homes and townhomes, yet respond to the demographic shift toward smaller households looking for alternatives to the large-lot single family home and younger families looking for affordability.



*Apartments / condominiums*

This category accommodates duplexes, triplexes, fourplexes, apartments, condominiums, life care and other forms of multi-family housing types. As with the preceding land use category, creating opportunities for diverse types of housing will become increasingly important to respond to demographic shifts and the continued need for affordable housing within Georgetown. This land use classification is ideally suited near major activity and employment centers and in areas suitable for future transit service.

The High-Density Residential category may also support complementary non-residential uses along arterial roadways such as neighborhood-serving retail, office, institutional, and civic uses, although such uses may not be depicted on the Future Land Use Map. Standards should be established to maximize compatibility of these uses with adjacent land uses, minimize traffic congestion and overloading of public infrastructure, and also ensure a high standard of site, landscape, and architectural design.

## ***Commercial Use***

Commercial areas are those where the predominant activities involve the production, distribution, and/or sale of goods and services. The land use categories described below accommodate a range of such existing and future commercial activities, consistent with the Future Land Use Map. These areas strengthen the city's commercial base and create employment opportunities for the community. As with the commercial services allowed in the preceding Residential categories, standards in the Commercial designations should be established to maximize compatibility of these uses with adjacent land uses, minimize traffic congestion and overloading of public infrastructure systems, and ensure a high standard of site, landscape, and architectural design.

### **Community Commercial**



*Community commercial*

This category applies to areas that accommodate retail, professional office, and service-oriented business activities that serve more than one residential neighborhood. These areas are typically configured as “nodes” of varying scales at the intersection of arterial roads, or at the intersection of arterials and collectors. Community commercial areas typically will include some neighborhood-serving commercial uses as well as larger retail uses including restaurants, specialty retail, mid-box stores, and smaller shopping centers. They may also include churches, governmental branch offices, schools, parks, and other civic facilities.

### **Regional Commercial Destination**



*Regional commercial destination  
(Wolf Ranch)*

This category applies to large concentrations of commercial uses that serve or draw a regional market, such as major shopping centers, stand-alone big-box retail, tourist attractions and supporting accommodations, and automobile-oriented commercial uses that rely on convenient access from major transportation routes and highway interchanges. Such properties are often configured in a manner or located in areas that may not be suitable for the introduction of mixed-uses.

### ***Mixed-Use***

The various mixed-use categories refer to areas that combine retail, service, and other commercial uses with office and/or residential use in the same building or on the same site. Mixed-use areas can create vibrant pedestrian-oriented urban environments by bringing complementary activities and public amenities together in one location at various scales. As a historic city, Georgetown retains mixed-use characteristics in some areas, such as the downtown. New mixed-use areas are intended to create similar higher density, pedestrian-friendly environments where the variety of uses enables people to live, work, play, and shop in one place. The proximity of diverse uses and pedestrian orientation of these areas make it possible to reduce vehicular trips and to encourage the use of transit. Some of the larger-scale or more intensely developed areas can become destinations for the city or even the region.

Mixed-uses can be integrated vertically in a single structure, with the upper floors used for office or residential use and the ground floor for retail or service uses. They can also be integrated horizontally; for example, when a single structure provides retail or service uses in the portion fronting the public street and office uses or residential behind. Mixed-use development can also be horizontally integrated if two or more structures are developed on one site to provide retail, service, office, and even light industrial uses in part of the structure, usually fronting the public or private street, and lower intensity uses such as residential in separate structures.

To support new land use policies aimed at promoting more compact, sustainable development patterns—reducing auto trips, increasing connectivity, encouraging walking and the use of transit, and expanding the supply of higher density, affordable housing near employment and activity centers—the Future Land Use Map contains significant amounts of land for a variety of mixed-use forms throughout the city. These land use categories differ primarily in the scale and intensity of development encouraged in them, and all of them should be implemented through the application of zoning and development standards that encourage appropriate form and character.

### ***Mixed-Use Community***

This category is intended for large tracts of undeveloped land, which are appropriate for larger scale, creatively planned communities, where a mix of residential types and densities are complemented by supporting retail, small to medium-scale office development, and integrated open spaces, where appropriate. Compatibility among these various uses will be maintained through design standards that address the locations, character and relationships between uses, while affording greater development flexibility than provided by standard zoning district classifications.



*Planned development communities*

Instead of specifying a range of allowable residential densities, the residential mixed-use designation encourages a balanced mixture of residential types as the predominant use in this category, at densities consistent with those provided for each housing type in the base residential categories described previously. Development in this category is best served in planned unit development form or specific mixed-use zoning standards.

### Mixed-Use Neighborhood Center



*Neighborhood-serving commercial uses*

This designation applies to smaller areas of mixed commercial use within existing and new neighborhoods. These areas are primarily proposed adjacent to, or as part of, larger residential neighborhoods. Neighborhood-serving mixed-use areas abut roadway corridors or are located at key intersections. They often function as gateways into the neighborhoods they serve.

These compact and often “walk-to” centers provide limited retail goods and services to a local customer base, while having minimal impact on the surrounding residential uses. They accommodate (but do not require) mixed-use buildings with neighborhood-serving retail, service, and other uses on the ground floor, and offices or residential units above. They may also include stand-alone high density residential development.



*Neighborhood commercial mixed-use area*

Uses in these areas might include a corner store, small grocery, coffee shops, hair salons, dry cleaners and other personal services, as well as small professional offices and upper story apartments. They may also include non-commercial uses such as churches, schools, or small parks. In new neighborhoods, in particular, the exact size, location, and design of these areas should be subject to a more specific approval process, to ensure an appropriate fit with the surrounding residential pattern



### Specialty Mixed-Use Area

This designation accommodates large-scale mixed-use developments that are mostly commercial and usually near intense regional commercial uses and the I-35 corridor. This category encourages the creation of well planned “centers” designed to integrate a variety of complementary uses, with an emphasis on retail, offices, and entertainment activities. These centers may also include civic facilities and parks or other green spaces. Housing, in the form of apartments, townhomes, condominiums, and live-work spaces, is also encouraged in these mixed-use areas, generally in higher densities. These areas should be designed in a pattern of pedestrian-oriented, storefront-style shopping streets, with shared parking and strong pedestrian linkages to the surrounding areas.



*Regional mixed-use development*



*Downtown activity center*

This category also applies to downtown Georgetown, reflecting its role as a regional destination for services, cultural, and civic functions. This emphasizes the urban character and the mix and intensity of uses uniquely suited to this center of activity. The designation is intended to permit a true mix of uses (except industrial and mining), with unique development standards tailored to the character of the area, such as the downtown area or TOD site(s). As promoted by the Downtown Master Plan, the intent is to move the downtown area towards becoming a center of activity not only in the day, but also at night and on weekends, by promoting a mix of commercial, entertainment, residential, and civic uses. Creative forms of housing are encouraged, such as attached homes, “lofts,” and live-work units. To protect the historic character of downtown, the Land Use Element recommends maintaining the maximum building height in this district, while allowing maximum residential densities to be controlled by the building height, setback, landscape, impervious coverage, and other regulatory limitations.

This land use category will accommodate development that supports light rail and other forms of transit and is best accommodated by a planned unit development or specific mixed-use zoning standards.

### Employment Center

This designation is intended for tracts of undeveloped land located at strategic locations, which are designated for well planned, larger scale employment and business activities, as well as supporting uses such as retail, services, hotels, and high density residential development (stand-alone or in mixed-use buildings) as a conditional use.



*Business park*

Many Employment Center designations will include undeveloped properties identified by the City as opportunity sites for centers of commerce or employment. These sites may be acquired and developed through public-private partnerships. Primary uses include offices, flex



*Office*

offices, and technology research and development, as well as environmentally friendly manufacturing. These uses should be encouraged to develop in a campus-like setting with generous, linked open space to maximize value, promote visual quality, and encourage pedestrian activity between employment areas and areas of supporting uses such as retail, restaurants, and residential.

These areas often act as a transition between more intensely developed commercial uses and residential neighborhoods. For this reason, standards should be developed to ensure that development of these activities is compatible with the character of the surrounding area.



*Light industrial*

Industrial uses that already exist or are anticipated to continue for the foreseeable future are a part of this designation. Such uses include light industrial uses like manufacturing, assembly, wholesale, and distribution activities. Care should be taken to protect adjacent uses from adverse impacts potentially associated with these uses (truck traffic, outside storage, etc.), using buffering and/or performance-based development standards.

### ***Mining***



*Quarrying / mining activities*

This category accommodates existing activities that involve land excavation for the extraction of minerals and similar substances. They are primarily located in the northern and southern fringes of the city along SH 195 and Leander Road. In most cases, these activities are anticipated to continue for the foreseeable future. Care should be taken to protect adjacent uses from adverse impacts associated with these activities. There are some current mining uses not shown on the map, as they will cease operations in the short-term.

### ***Institutional Use***



*Educational uses  
(Southwestern University)*

The institutional category refers to individual or concentrations of government operations and uses, including government administrative offices, libraries, police, fire and EMS services, airports, correctional facilities, and infrastructure. Schools, university and college campuses, and similar educational uses and centers are also a part of this designation, as are community institutions that are privately or semi-private owned, such as churches and major medical and health care facilities.

### ***Parks, Recreation and Protected Open Space***

This designation applies to existing public parks, golf courses, and protected open spaces of city-wide significance, which are expected to remain as open space in perpetuity. Potential future large-scale park acquisitions, as well as smaller neighborhoods parks and recreational uses are shown in the Parks and Open Space Master Plan.



*Public parks (San Gabriel Park)*

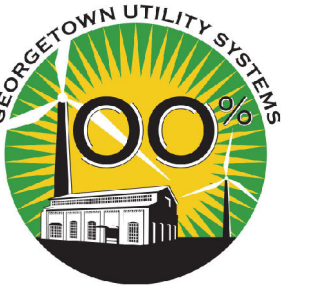
### ***Ultimate City Boundary Line***

The Ultimate City Boundary Line represents the planned expansion boundary of the city limits, by virtue of agreements with, and actions taken by, adjacent communities regarding their intentions to expand to accommodate growth. The Ultimate City Boundary Line is not set in stone but a guide to plan for future infrastructure and growth.



**FUTURE LAND  
USE PLAN**

April, 2019



The Future Land Use Plan represents a conceptual vision of the community's desired land use patterns over the next 20 to 30 years. It serves as a guide for decisions regarding zoning, roadways, utilities, and other issues related to the physical development of the City.

Per Texas State law, "A comprehensive plan shall not constitute zoning regulations or establish zoning district boundaries."

**Legend**



**Residential  
Land Use Categories:**  
Agricultural / Rural Residential  
Low Density Residential  
Moderate Density Residential  
High Density Residential

**Commercial  
Land Use Categories:**  
Community Commercial  
Regional Commercial

**Mixed Use  
Land Use Categories:**  
Mixed Use Community  
Mixed Use Neighborhood Center  
Specialty Area  
Mixed Use  
Employment Center

**Other  
Land Use Categories:**  
Institutional  
Parks, Recreation, Protected Open Space  
Mining

**Cartographic Data For  
General Planning Purposes Only**

The accuracy and precision of this cartographic data is limited and should be used for informational purposes only. This data does not replace surveys conducted by registered Texas land surveyors nor does it constitute an "official" verification of zoning, land use classification, or other classification set forth in local, state, or federal regulatory processes. The City of Georgetown, nor any of its employees, do not make any warranty, express or implied, including any warranty of merchantability and fitness for a particular purpose, or assumes any legal liability or responsibility for the accuracy, completeness, or usefulness of any such information, nor does it represent that its use would not infringe upon privately owned rights.



Coordinate System:  
Texas State Plane/Central Zone/NAD 83/Feet

Map maintained by:  
City of Georgetown, Texas  
Technical Services Department  
300 Industrial Avenue  
Georgetown, Texas 78627



City of Georgetown, Texas  
2030 Comprehensive Plan Update Committee  
August 15, 2019

**SUBJECT:**

Mapping Exercise. – Nat Waggoner, PMP, AICP, Long Range Planning Manager

**ITEM SUMMARY:**

Staff will facilitate an exercise with the Steering Committee to evaluate changes to the Future Land Use map. Questions for the Committee to evaluate during the exercise include:

- a. Where are key activity centers in Georgetown? What makes them important?
- b. Where should we allocate the (7-10K) future housing units based on projected population growth?
- c. Where should we locate our supporting commercial uses? See recommendations in Retail Merchandising Plan below.
- d. Where should we locate our target industry uses? See recommendations in Target Industry Analysis below.
- e. How will the placement of these uses, residential, commercial and industry land uses support recently updated policies? Specifically:
  - i. 1.A – “Encourage a balanced mix of residential, commercial, and employment uses at varying densities and intensities, to reflect a gradual transition from urban to suburban to rural development.”
  - ii. 1.B – “Promote more compact, higher density, well-connected development within appropriate infill locations.”
  - iii. 2.B – “Identify potential opportunities and selectively target, plan, and promote development/reuse initiatives.”
  - iv. 6.A – “Encourage innovative forms of compact, pedestrian friendly development and a wider array of affordable housing choices through provisions and incentives.”

**FINANCIAL IMPACT:**

N/A

**SUBMITTED BY:**

Nat Waggoner, PMP, AICP

**ATTACHMENTS:**

	Description	Type
□	Target Industry Analysis	Exhibit
□	Retail Merchandising	Exhibit

A detailed topographic map of Georgetown, Guyana, showing the city's layout, major roads, and the Essequibo River. The map is rendered in a light gray, line-art style. The city grid is prominent in the lower right, while the river winds through the upper and middle sections. The background of the slide features a darker, semi-transparent version of this map.

# CITY OF GEORGETOWN TARGET INDUSTRY ANALYSIS

AUGUST 18, 2017



# About the City of Georgetown Economic Development Target Industry & Workforce Analysis

In April 2017, the City of Georgetown initiated the development of an Economic Development Target Industry & Workforce Analysis aimed at diversifying the local economy, increasing business investment throughout the city, and fully leveraging hometown talent. Through a competitive bidding process, the City of Georgetown retained Avalanche Consulting, a national economic development consultancy based in Austin, TX, to facilitate the preparation of the Economic Development Target Industry & Workforce Analysis. Georgetown residents and businesses were invited to share their perspectives and vision for the community through an online survey and a series of individual interviews and focus groups.

Once complete, the Economic Development Target Industry & Workforce Analysis will have two primary phases:

## **Phase 1: Workforce Analysis**

The Economic Development Target Industry & Workforce Analysis begins with an exploration of Georgetown's competitive position. The study team examined a range of local assets and quantitative metrics to better understand the city's evolving economy and population. In addition to data analysis, the study team conducted multiple focus groups and interviews. All input is then distilled into a concise SWOT summary outlining the community's strengths, weaknesses, opportunities, and threats.

## **Phase 2: Target Industry Analysis**

This second phase of the Economic Development Target Industry & Workforce Analysis includes the target industries and niche sector recommendations of the consulting team's. By targeting specific industry clusters, the City of Georgetown can more strategically invest in those factors such as infrastructure or workforce training programs necessary to spur job creation within the community. Target industry identification blends industry location quotient analysis with a review of data trends, SWOT evaluation, and city priorities.

# Why Target?

Identifying target industries is an important part of effective economic development. **No community can be all things to all businesses.** Instead the most successful communities identify their key competitive strengths and focus their economic development activities on those industry industries that best match those strengths.

Targeting specific industries is not only about attracting new businesses to a community. It is about **understanding and addressing the needs of existing businesses**; it is about fostering an **environment that encourages new businesses** to form locally; and it is about **aligning activities in pursuit of a shared vision** for the entire community.

**Focusing on target industries also does not mean that other businesses are ignored.** Economic development activities are aimed at improving the overall economy in Georgetown for all businesses. Investments and programs designed for target industries should benefit all sectors of the local economy.

The following *Target Industry Analysis* provides a list of recommended target industries for the City of Georgetown and an explanation of how each of these industries and their niche sectors were identified.

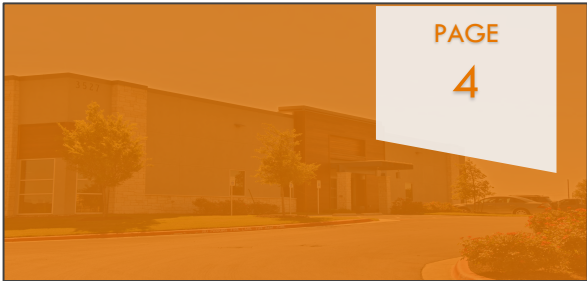
This analysis also includes profiles of each target industry. These profiles include a general description of each industry, their economic trends, and related locational requirements – such as workforce, infrastructure, and regulatory needs. Each industry profile also includes descriptions of specialized niched sectors that present strong opportunities for growth in Georgetown. The profiles conclude with a sample of sales messages that describe a business case for growing each industry in Georgetown.

This report is a resource for leadership, economic development partners, and citizens. It should help everyone better understand the business opportunities that exist in Georgetown and provide a platform on which to develop strategies to grow these industries.



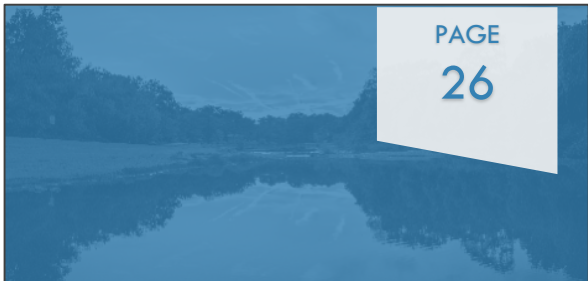
# Table of Contents

## TARGET INDUSTRY RECOMMENDATIONS



The Target Industry Analysis begins with a discussion on how industries were evaluated. The section then includes a series of recommendations on specific target industries and niche sectors for the City of Georgetown.

## TARGET INDUSTRY PROFILES



The Target Industry Profiles provide greater detail about each industry, their location needs, and the opportunity they present for Georgetown.

# 01

## Target Industry Recommendations

*This section of the report describes the criteria used to evaluate potential industries and recommends specific target industries and niche sectors for the City of Georgetown.*

# Target Industry Identification

Selecting targets is an iterative process – using quantitative and qualitative information to identify targets that offer the greatest opportunities for a community based on local assets, needs, and desires.

The consulting team asked four primary questions to filter potential industries:

## **1. Is the industry growing and projected to grow within Georgetown, the Austin Metro, Texas, and the US?**

*Communities should focus their economic development efforts on industries that offer the highest return on investment. Investing in industries that are declining or likely to decline in the future is typically a poor use of resources.*

## **2. Does the industry already have a presence in Georgetown?**

*Industries with an existing presence in Georgetown may reflect local competitive advantages. Concentrated industries may also offer strong opportunities for expansion, recruitment, and startup growth with continued support.*

## **3. Does the industry match Georgetown's assets?**

*The Workforce Analysis and this Target Industry Analysis report identify numerous competitive assets and opportunities in Georgetown. Potential target industries were evaluated based on their compatibility with these assets.*

## **4. Does the industry align with Georgetown's goals and vision?**

*Industries were evaluated based on their ability to support the goals and values identified in conversations, focus groups, and interviews with Georgetown leadership, stakeholders, and City staff.*

# Competitive Strengths & Opportunities

Georgetown has numerous strengths and opportunities that make it a competitive location to grow and attract businesses. Some of the primary assets and strengths considered when selecting target industries include:

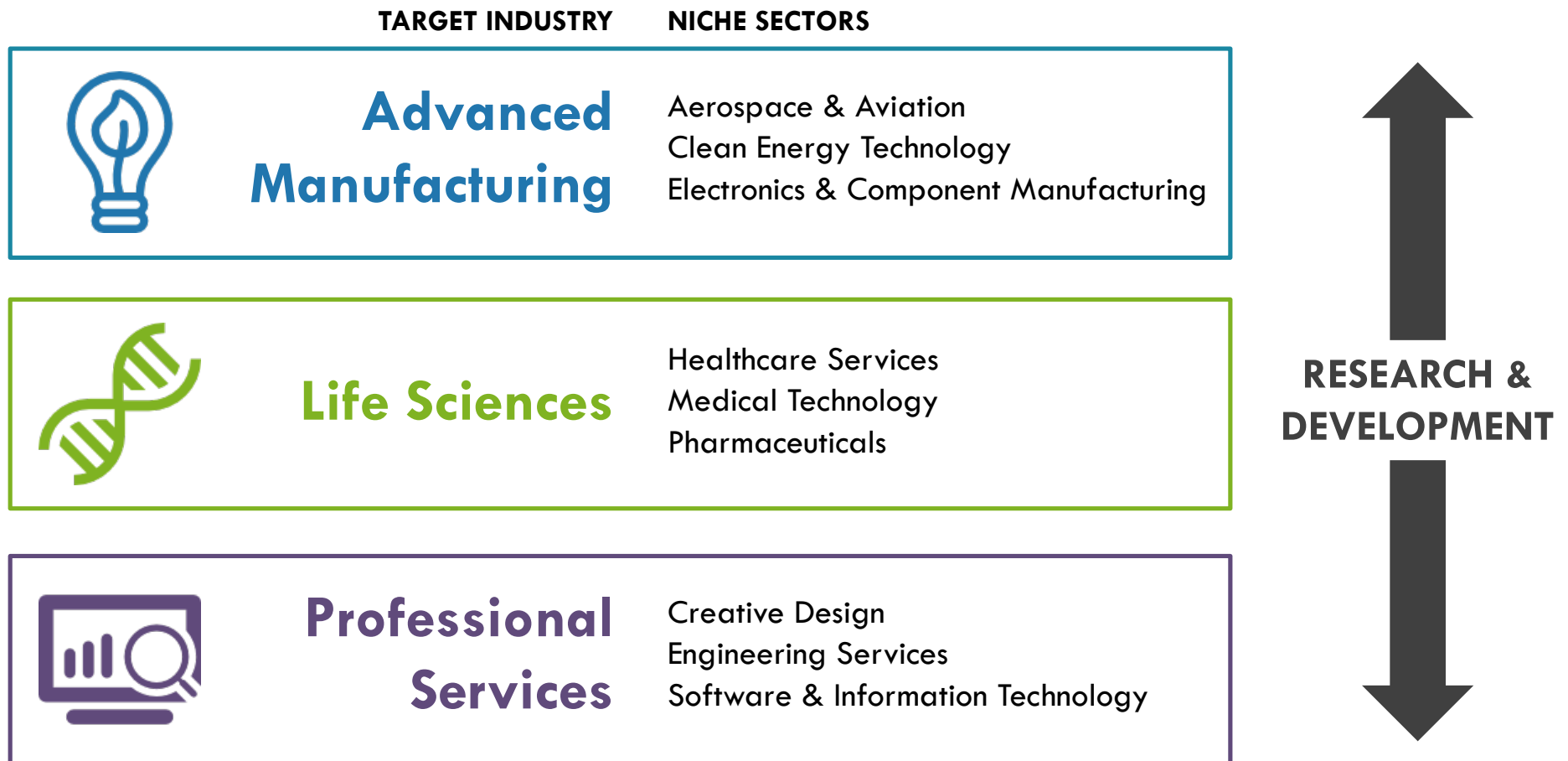
- Historically, Georgetown was often viewed as a bedroom and retirement community, but in recent years, the city has seen rapid job growth in conjunction with population growth. As central Austin and the inner ring of metropolitan area communities become highly developed, **Georgetown is increasingly viewed as an attractive and affordable location** for a range of industries.
- **Retired residents** of Georgetown are highly active in the community and regularly volunteer their time and skills. This large population is highly educated and many have retired from successful business careers. They can offer tremendous benefit to local companies and entrepreneurs as part-time **employees, advisors, and mentors**.
- Local elected leaders and City staff are **proactively supportive of growing new businesses** in the city.
- Georgetown has a relatively **large manufacturing sector** for a community of its size. Alongside this employment base, the city also has a **surprisingly strong Maker culture** that encourages experimentation and development in skilled manufacturing.
- Georgetown is home to a **wealth of talent**. Residents are highly educated – with 44% holding a bachelor's degree or higher – but a majority (75%) of working residents commute out of the city to their jobs each day. Many of these residents would prefer not to commute and present a large pool of potential workers for businesses located in the city.
- In addition to out-commuting residents, employers in Georgetown are able to draw from **a labor force of 700,000 workers** spread across the city's North and South labor sheds. Each labor shed has unique characteristics – including high concentrations of Medical and Construction occupations in the North and a high concentration of Computer occupations in the South.
- Georgetown is home to a **large veteran population**, and the North labor shed encompasses Fort Hood.
- Georgetown offers a **high quality of life**, and employers report high success recruiting workers from outside the region to live in the city. Employers generally reported that finding skilled trade workers was relatively easy, but some worry that rising cost of living and traffic congestion are making it harder to find low-skill workers.
- Education is a major strength in Georgetown. **Southwestern University** is located in the city, and an **Austin Community College** campus is located in Round Rock. The **East Williamson County Higher Education Center** has campuses in Hutto and Taylor. The **Georgetown Independent School District** has also made significant gains in STEM education and Career & Technical Education (CTE) programs in recent years.
- Georgetown's **commitment to renewable energy resources** is attractive to many businesses – especially in clean energy.



# Georgetown Target Industry Recommendations

Based on the analysis conducted through this selection process, Avalanche recommends three target industries and nine niche sectors for the City of Georgetown. Research & Development is an additional target that underlies all three industries.

The profiles in the following section provide additional detail about each target and why they make sense for Georgetown.



# Target Industry Alignment

Economic development activities are supported by more than the City of Georgetown. It is important to consider how each target industry fits into regional and statewide programs.

Georgetown is part of Opportunity Austin, an economic development initiative representing the multi-county and multi-city Austin metropolitan region. Georgetown is also supported by Team Texas and the Texas Governor's Office of Economic Development and Tourism. These groups have identified statewide target industries and created programs to support their growth.

Not every statewide or regional target aligns with those of Georgetown, but each local target should fit into the broader framework. By aligning targets, the City of Georgetown will be able to leverage marketing, education, financial, and other supportive resources provided by the state and region.

Local economic development efforts must also highlight the opportunities that make Georgetown unique within the Austin region and within Texas. When a target industry business is considering expanding or relocating in Texas or Austin, Georgetown should be top of mind as a potential location.

GEORGETOWN TARGET	OPPORTUNITY AUSTIN TARGET	TEXAS TARGET
Advanced Manufacturing	Advanced Manufacturing	Advanced Technology & Manufacturing
	Clean Energy & Power Technology	Energy
	Space Technology	Aerospace, Aviation, & Defense
Life Sciences	Life Sciences	Biotechnology & Life Sciences
Professional Services	Creative & Digital Media Technology	Information & Computer Technology

# 02

## Target Industry Profiles

The profiles on the following pages provide greater detail about each of Georgetown's target industries and their niche sectors. Each profile includes an overview of the industry – describing its activities, business location factors, and recent employment trends. The profiles then highlight global forces that may impact each industry's future. The consulting team also shares local sales messages that demonstrate Georgetown's appeal to each target industry. Each profile concludes with a discussion of the availability of workforce supporting each industry in Georgetown's North and South Labor Sheds.

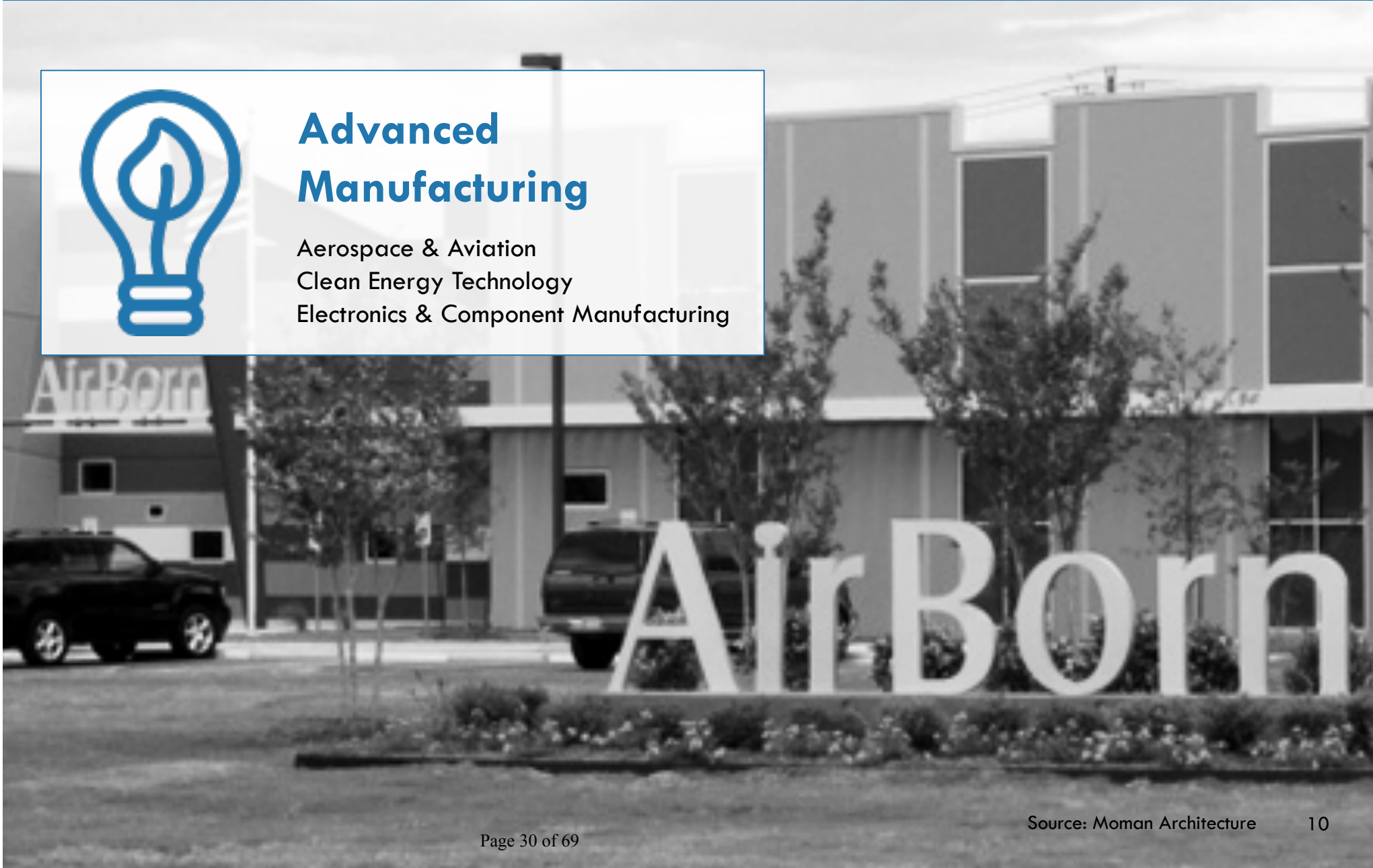
These profiles are meant to serve as a reference to the City of Georgetown, its partner organizations, city residents, and local businesses. The profiles should arm the community with information to help make more informed decisions about strategic programs and investments.

# Advanced Manufacturing



## Advanced Manufacturing

Aerospace & Aviation  
Clean Energy Technology  
Electronics & Component Manufacturing



# Advanced Manufacturing

## INDUSTRY OVERVIEW

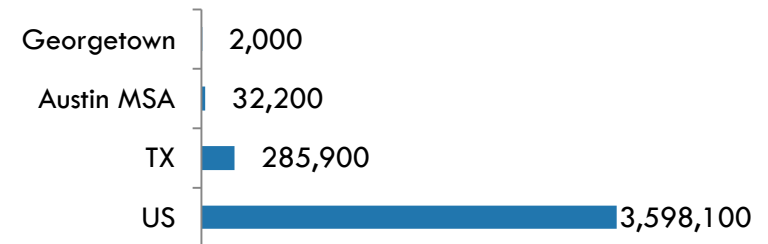
Advanced Manufacturing involves the transformation of raw materials into component pieces and finished products using complex machinery and sophisticated production processes. Despite the national media's focus on the decline of US manufacturing, its employment has increased every year since 2010 and currently employs more than 3.6 million Americans.

Modern Advanced Manufacturing is distinguished by its reliance on advanced technology and a skilled labor force. Many Advanced Manufacturing occupations require specialized training to operate complex machinery. As a result, Advanced Manufacturing operations often seek locations with a strong technical college or other training systems. High demand for these skilled workers often supports relatively high wages in this industry.

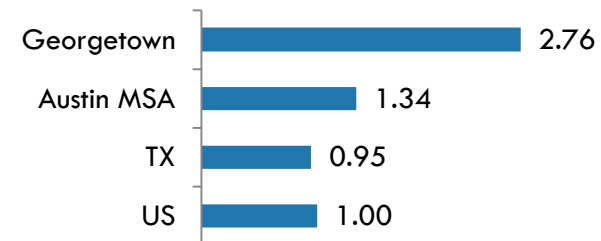
Advanced Manufacturing operations typically require plentiful, affordable energy supplies. Advanced Manufacturing subsectors may also require sizable natural gas, water, and wastewater capacity. Proximity to an interstate is preferable to help facilitate delivery of both raw materials and finished products. Available rail access may also be a consideration.

Advanced Manufacturing jobs are already highly concentrated in Georgetown – with 2,000 jobs and an LQ of 2.76 – more than double the concentration in Austin. Advanced Manufacturing jobs are also growing more rapidly in Georgetown and forecast to continue rapid growth into the near future.

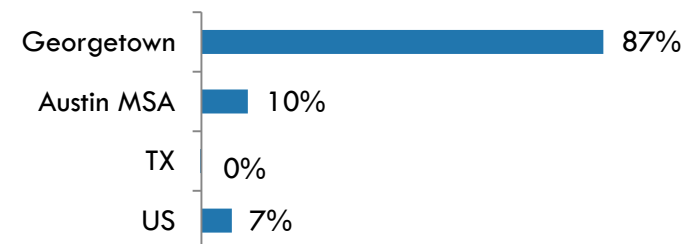
## ADVANCED MANUFACTURING EMPLOYMENT, 2016



## ADVANCED MANUFACTURING LOCATION QUOTIENT, 2016



## ADVANCED MANUFACTURING EMPLOYMENT GROWTH, 2011 – 2016



# Advanced Manufacturing

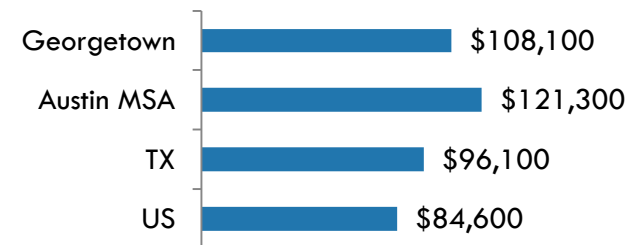
## GLOBAL FORCES

Manufacturing employment in the US declined for three decades as companies moved operations abroad to secure cheaper labor. In recent years, however, **US Manufacturing has enjoyed a resurgence** as domestic production becomes more globally competitive. **Increased automation** and the continued **adoption of robotics** have helped make US manufacturers more productive. **Rising foreign labor costs** have increased the cost competitiveness of US workers, and **declining commodity prices**, including domestic energy prices, have lowered the cost of US production and transportation.

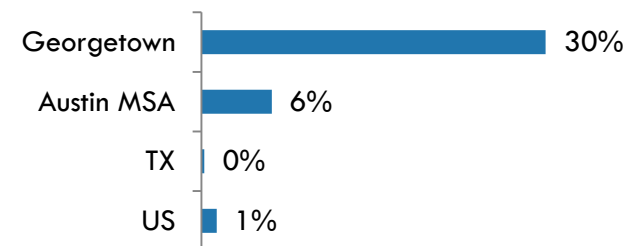
While automation makes US manufacturers more competitive, it is also changing the nature of manufacturing work – eliminating the need for some positions, creating others, and requiring overall greater training of workers.

While increased productivity has helped the US maintain its position as the world's second-largest producer of manufactured goods, a rise in the sense of nationalism in the US and other countries has raised the specter of a **trade war** that would threaten domestic manufacturing. Additionally, possible renegotiations of trade agreements such as NAFTA would could have significant impacts on US manufacturing.

## ADVANCED MANUFACTURING AVERAGE SALARY, 2016



## ADVANCED MANUFACTURING FORECAST EMPLOYMENT GROWTH, 2016 – 2021



Source: EMSI / Avalanche Consulting



# Advanced Manufacturing

## *NICHE SECTORS*

### **Aerospace & Aviation**

Aerospace and Aviation includes companies involved in the design, manufacture, and operation of various forms of aircraft and their components. Whereas Aviation-related aircraft operate within the Earth's atmosphere, Aerospace-related aircraft typically extend beyond the Earth's atmosphere and into space. Both industries have experienced growth in recent years with private space exploration driving an expansion of the the Aerospace sector and increased demand for international air travel fueling new aircraft production. The emerging Unmanned Aerial Vehicles (UAV) market, expected to double during the next 10 years, represents another major growth area.

Maintenance, Repair, and Overhaul (MRO) operations are another important segment of this sector. These services are performed by the airlines themselves or independent contractors in centralized, regional facilities. With numerous airlines competing for space at busy major airports, many are looking for MRO locations outside larger metropolitan areas where they can conduct these activities at lower costs.

### **Clean Energy Technology**

Clean Energy Technology covers operations focused on the development and manufacturing of products and processes to reduce carbon output. These technologies are most often utilized in transportation, energy production and transmission, and energy efficiency. The rise of Clean Energy Technology has been primarily driven by emission standards and other regulations, fluctuating energy costs, changes in consumer attitudes, and an influx of R&D. The International Renewable Energy Agency (IRENA) projects that employment in clean energy will triple worldwide to 24 million by 2030.

Companies involved in Clean Energy Technology seek locations with an established technology industry, a strong research university, and existing energy expertise.

# Advanced Manufacturing

## **Electronics & Component Manufacturing**

Electronics & Component Manufacturing includes the manufacture, design, development, assembly, and servicing of electronics and components featuring integrated circuits. According to a 2016 analysis by IBISWorld, the global consumer electronics manufacturing industry was valued at \$286 billion. The industry is divided into four key segments: government products, industrial products, consumer products and electronics components. Companies in this industry must invest substantial resources into research and development to constantly improve parts, products, and the processes to improve them, specifically to keep up with the demand for new technologies and green/energy efficient products. Key areas of future growth include: automotive, mobile devices, healthcare, communications, and data processing.

Important site location considerations for companies in the Electronics & Component Manufacturing sector include a highly-skilled workforce, energy availability and affordability, and proximity to interstate.



# Advanced Manufacturing

## LOCAL SALES MESSAGES

- Georgetown is already home to a highly-concentrated and rapidly growing Advanced Manufacturing industry. The success of existing businesses highlights Georgetown's competitive position.
- Alongside manufacturing employers, Georgetown is a "Get Things Done" community. Many adults and youth in Georgetown embrace a "Maker" culture focused on innovative manufacturing and design.
- Georgetown benefits from a logistically strong geographic location – with easy access to Interstate 35, State Highway 130, and rail service from both Burlington Northern Santa Fe and Union Pacific railroads.
- There is plentiful commercial and industrial land available for development in Georgetown, and the City continues to plan for the future and make infrastructure investments necessary to accommodate growth.
- Georgetown Municipal Airport is an important asset for the city – supporting flights for executives, corporations, and general aviation activity. The airport has surrounding land available for development and already supports a flight training school
- In partnership with the airport and others, the Georgetown ISD recently completed a program where students designed and built an actual airplane, which was flown before graduation.
- The City of Georgetown's commitment to renewable energy is attractive to many businesses for a variety of reasons – including cultural fits, co-branding opportunities, and cost assurances. The renewable energy commitment will ensure a sustainable source of electricity into the future.
- Advanced Manufacturers in Georgetown can draw from an available labor force of over 30,000 workers in supportive occupations across both labor sheds.
- Georgetown is home to a large veteran population, and employers draw workers from as far north as Fort Hood – helping capture existing military and other skilled trade workers.
- Existing employers generally have good success finding skilled trade workers locally and recruiting workers from outside the region. Additionally, Austin Community College, East Williamson County Higher Education Center, the University of Texas, Texas State University, Texas State Technical College, and other regional institutions offer training programs in a wide range of skills required in this industry.
- Georgetown is part of the Austin Metro – one of the most innovative regions in the world, with a host of companies and institutions conducting cutting edge research and development in clean energy technology and other manufacturing sectors.

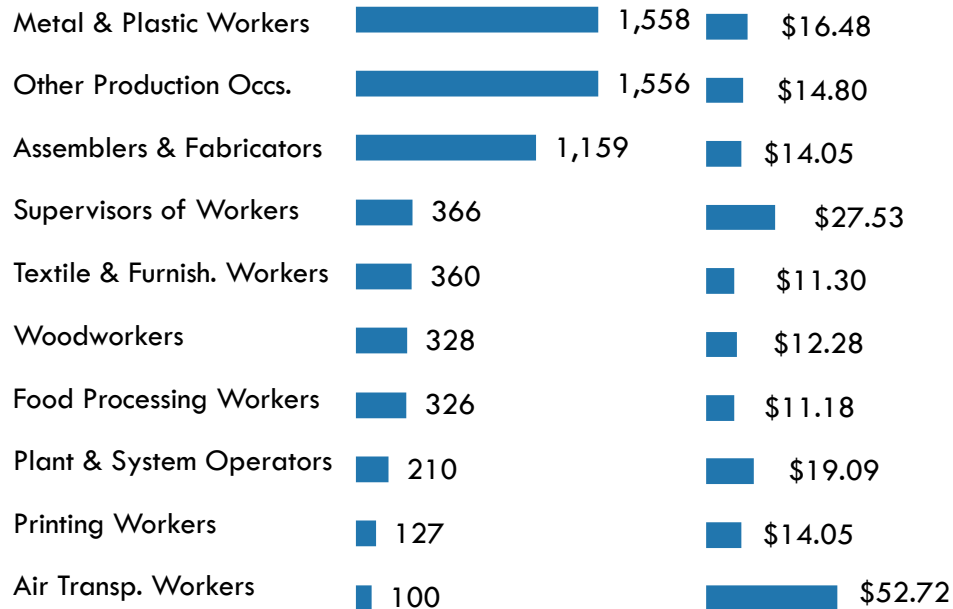
# Advanced Manufacturing

## GEORGETOWN WORKFORCE

Georgetown has access to a large Advanced Manufacturing workforce, with 6,000 individuals in supportive occupations in the North Labor Shed and nearly 28,000 workers in the South Labor Shed. The largest occupational categories of workers available are Other Production Occupations (which include a mix of operators, inspectors, and other miscellaneous positions), Assemblers & Fabricators, and Metal Workers & Plastic Workers.

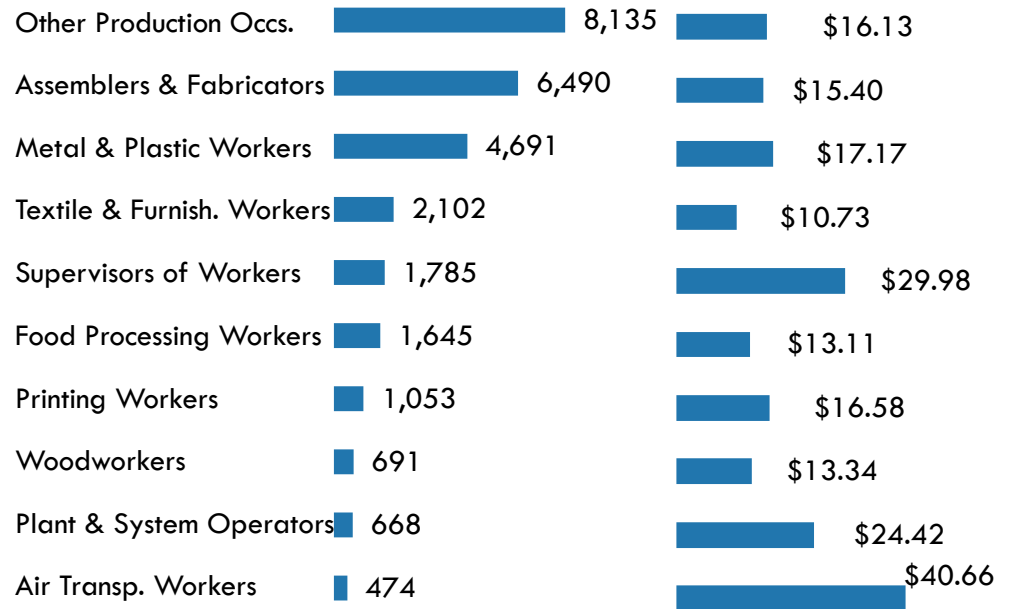
### GEORGETOWN **NORTH** LABOR SHED – 2016

INDUSTRY SUPPORTIVE WORKERS      AVERAGE HOURLY \$



### GEORGETOWN **SOUTH** LABOR SHED – 2016

INDUSTRY SUPPORTIVE WORKERS      AVERAGE HOURLY \$



# Life Sciences



## Life Sciences

Healthcare Services  
Medical Technology  
Pharmaceuticals



# Life Sciences

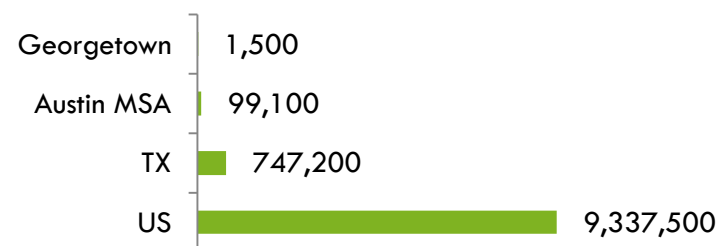
## INDUSTRY OVERVIEW

The Life Sciences industry covers a range of technology, products, and services meant to enhance the biological functions of animals, crops, and humans. This includes production, processing, and sales of crops and livestock agricultural products. It also covers the provision of medical care in hospitals, outpatient care, dental work, urgent care, elderly care, and veterinary offices—as well as the development and manufacture of products that promote human and animal health. Population growth, demographic change, technological innovation, global markets, and consumer preferences are all driving gains in this industry.

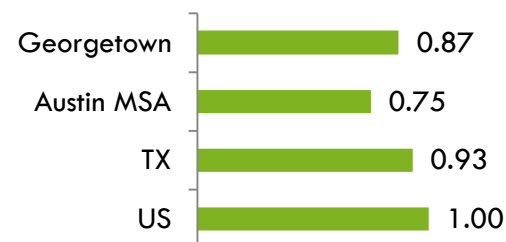
The location of Life Sciences operations is usually driven by the size and dynamics of local populations and the presence of research facilities in specialty fields. Hospitals and outpatient operations provide healthcare services to the residents of a community and often cluster in hubs to serve a broader region. Serving a larger, regional population allows industries to develop specialized care facilities. Pharmaceuticals, medical technology, and other related operations tend to cluster in centers that also feature a university research facility. The Life Sciences require significant education and training for their workers, including medical doctors, nurses, therapists, and technicians.

Life Sciences are currently less concentrated in Georgetown than the national average – with an LQ of 0.87 – but more than the Austin Metro. In recent years, Life Sciences jobs have grown more rapidly in Georgetown and are expected to continue that trend.

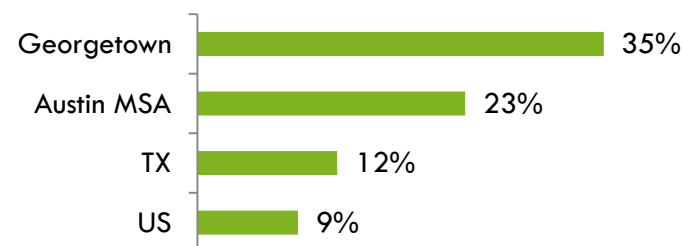
## LIFE SCIENCES EMPLOYMENT, 2016



## LIFE SCIENCES LOCATION QUOTIENT, 2016



## LIFE SCIENCES EMPLOYMENT GROWTH, 2011 – 2016



Source: EMSI / Avalanche Consulting

# Life Sciences

## GLOBAL FORCES

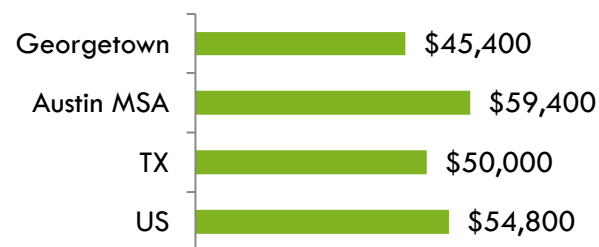
A variety of factors are contributing to the growth of the Life Sciences industry. The aging US population continues to create new demands for healthcare services. New medical devices, therapies, and pharmaceuticals increase both the demand and costs of healthcare. Ongoing changes to insurance and regulation add further complexity to an exceedingly intricate marketplace.

Rising costs are directly changing the Healthcare Services sectors – increasing the number of hospital system mergers, as they seek to reduce costs through consolidation. The drive for cost reduction is also leading to new emphases in the delivery of healthcare service. More doctors are prioritizing patient outcomes and focusing on behavioral, lifestyle, and wellness strategies. These in turn push growth in wellness products.

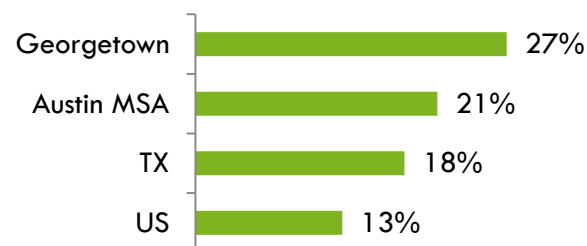
Technology is also a primary global driver in this cluster. Mobile devices and software are allowing doctors to reduce costs by providing distance treatment. The capture, consolidation, and analysis of patient data and human genetic and biological information is leading to more personalized and effective treatments and medicines.

Growth in the Life Sciences industry is unlikely to slow in the years ahead. Strong demand in this industry far exceeds any concerns related to cost structure and pricing or changes in regulatory compliance.

## LIFE SCIENCES AVERAGE SALARY, 2016



## LIFE SCIENCES FORECAST EMPLOYMENT GROWTH, 2016 – 2021



Source: EMSI / Avalanche Consulting

# Life Sciences

## *NICHE SECTORS*

### **Healthcare Services**

Healthcare Services covers the hospital systems, home healthcare, diagnostics laboratories, independent physician offices, and other ambulatory healthcare services that serve a community or region. Regional healthcare service providers can offer specialty treatment centers unavailable in smaller communities. The sector is largely driven by population dynamics and benefits from strong educational support.

### **Medical Technology**

Medical Technology includes the development and design of products used to monitor, diagnose, and treat a wide array of medical conditions and diseases. Advancements in the sector provide improved health outcomes and cost savings through earlier and more accurate diagnosis, less invasive treatment options, and reduced hospital stays and rehabilitation times. Products include everything from smartwatches to home diagnostics to 3D printed biological material.

### **Pharmaceuticals**

Pharmaceuticals are medicines designed and manufactured to treat human diseases and other ailments. The development of pharmaceuticals relies heavily on specialized research – often performed through partnerships between universities and private businesses. Production of pharmaceuticals relies heavily on chemical manufacturing skills and processes. Pharmaceuticals and new medicines receive the highest amount of R&D expenditures of any sector in the US.



# Life Sciences

## LOCAL SALES MESSAGES

- Georgetown is already home to a small but rapidly growing Life Sciences industry – including private companies in pharmaceuticals and other biotechnology areas.
- Georgetown features two world class hospital systems with an additional facility just outside the city limits – St. David's Georgetown Hospital and the Georgetown Scott & White Clinic. The Seton Medical Center Williamson County and Scott & White Hospital are also located in close proximity to Georgetown.
- The hospital systems offer an extensive suite of general and specialized services.
- Scott & White recently opened a cancer research facility in nearby Round Rock.
- The Georgetown Health Foundation is dedicated to supporting the healthcare system in Georgetown and owns extensive land that could be developed into an expanded medical district.
- Georgetown is well-located geographically – nearby to the University of Texas, Texas A&M, and other cutting-edge Life Sciences research and education institutions. There are numerous institutions across the Austin Metro focused on innovation and technological development in this industry.
- As the geographic core of Austin becomes more expensive, many entrepreneurs are seeking more affordable, high-quality locations with access to talented workers in the area. Georgetown is a perfect fit for these growing ventures.
- Georgetown's rapidly growing overall population and large retired community create high demand for healthcare services in the area. The local population also provides opportunities for development and testing of new products and services in this industry.
- Austin Community College, East Williamson County Higher Education Center, and other regional educational institutions provide extensive training in Life Sciences fields. The new University of Texas Medical School in Austin will also be a tremendous resource for the regional Life Sciences industry.

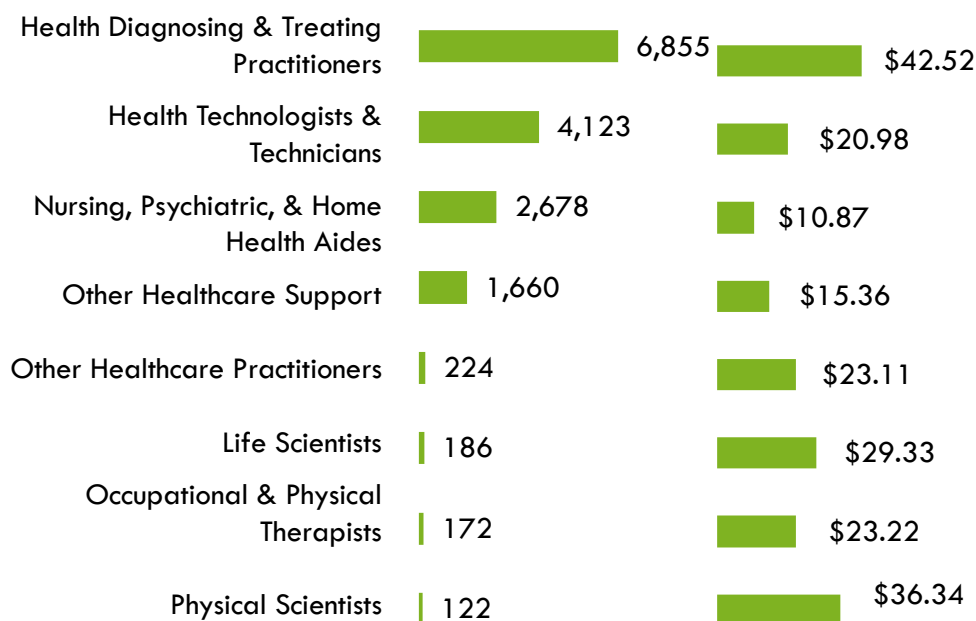
# Life Sciences

## GEORGETOWN WORKFORCE

Life Sciences employers in Georgetown can draw from an abundant pool of workers in both labor sheds. The North Labor Shed includes over 16,000 Life Sciences workers, and the South Labor Shed covers nearly 58,000 similar workers. The largest category of workers is Health Diagnosing & Treating Practitioners – which include doctors, nurses, surgeons, pharmacists, therapists, and many more. The North Labor Shed in particular has a high concentration of all these occupations.

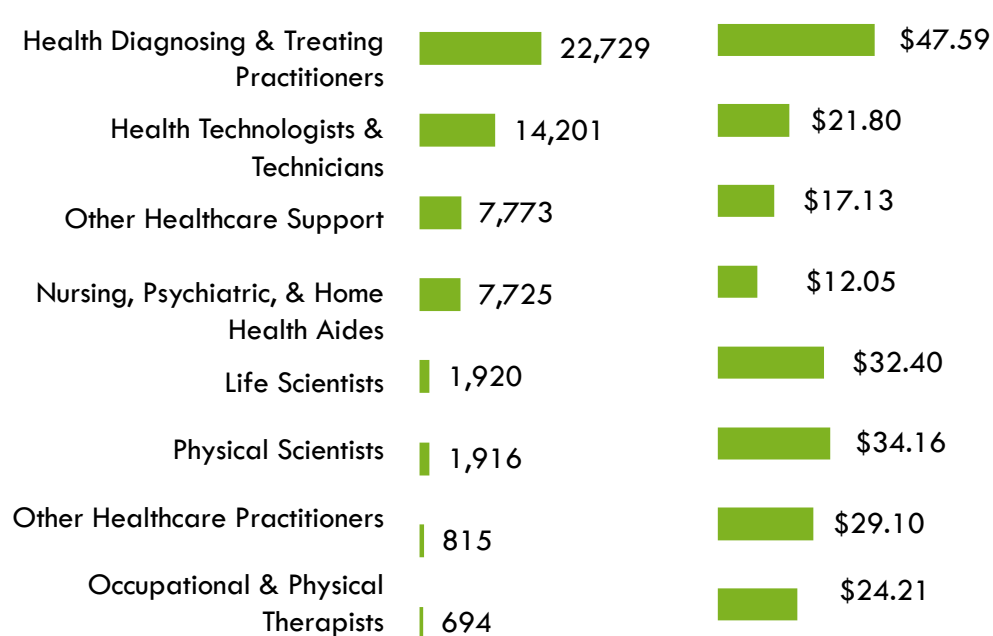
### GEORGETOWN **NORTH** LABOR SHED – 2016

INDUSTRY SUPPORTIVE WORKERS      AVERAGE HOURLY \$



### GEORGETOWN **SOUTH** LABOR SHED – 2016

INDUSTRY SUPPORTIVE WORKERS      AVERAGE HOURLY \$



# Professional Services



## Professional Services

Creative Design  
Engineering Services  
Software & Information Technology



# Professional Services

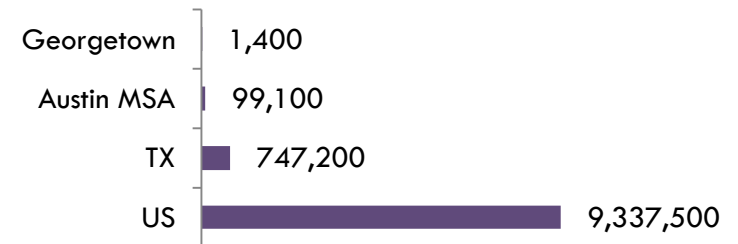
## INDUSTRY OVERVIEW

Professional Services includes a wide range of skilled services that often support other industries – from accounting and engineering to creative design and software development. With a heavy focus on the research and development of new products, systems, and software, Professional Services are often a source of innovation. Professional Services is also one of the largest industries in the US, with 9.3 million workers.

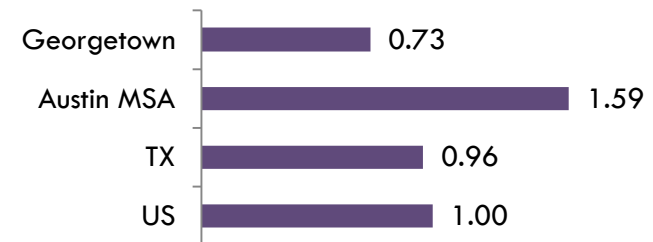
Professional Services operations have minimal infrastructure requirements. Office space and high-speed internet are usually the basic requirements for a firm to operate. Instead, talent availability is more important. If they are to thrive, Professional Services firms must be able to attract and retain talent. Quality of life is another critical location factor, as it facilitates the ability of Professional Services firms to recruit and retain the best talent. As a result, Professional Services firms often cluster in larger, centralized locations with plenty of amenities and in cities with universities that can provide a continuous supply of new workers with the latest skills.

With 1,400 employees, Professional Services is less concentrated in Georgetown than the overall Austin Metro – with a local LQ of 0.73 compared to 1.59 regionally. The industry is rapidly becoming more concentrated in Georgetown – growing 66% over the past five years and projected to grow another 28% over the next five.

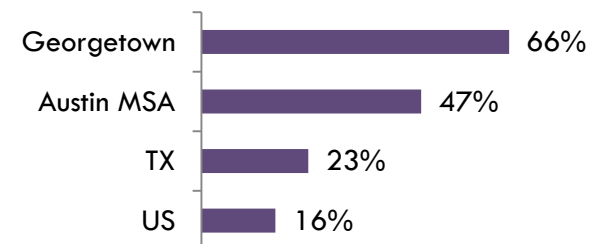
## PROFESSIONAL SERVICES EMPLOYMENT, 2016



## PROFESSIONAL SERVICES LOCATION QUOTIENT, 2016



## PROFESSIONAL SERVICES, EMPLOYMENT GROWTH, 2011 – 2016



# Professional Services

## GLOBAL FORCES

Professional Services is currently one of the most dynamic industries worldwide. This industry thrives in areas where there is a strong private sector supported by government with stable regulatory environments, strong intellectual property protections, and a reliable judicial system. For such reasons, the US continues to be the most desirable location for Professional Services firms.

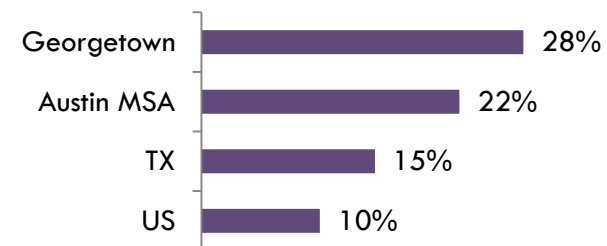
The **rise of cloud computing**, combined with a continued increase in the number of devices capable of producing data, has propelled an explosion in information worldwide; according to an estimate from IBM, 90% of all information ever created has been produced in just the past two years. Numerous subsectors have risen up in the Software & Information Technology field to find new ways of using this data to improve efficiencies in markets and better deliver a wide range of services to customers.

Continued development of **artificial intelligence** (AI) could potentially impact the Professional Services industry as once complex tasks become simplified and automated. Already we have seen the introduction of IBM's Watson in cancer research, tax preparation and aircraft maintenance. The impacts of AI on this and other industries remain unknown, but even if it eliminates some jobs, it has the potential to create new opportunities in programming and applications.

## PROFESSIONAL SERVICES AVERAGE SALARY, 2016



## PROFESSIONAL SERVICES FORECAST EMPLOYMENT GROWTH, 2016 – 2021



Source: EMSI / Avalanche Consulting

# Professional Services

## *NICHE SECTORS*

### **Creative Design**

Creative Design covers individuals and businesses that offer contracted design services in a number of specialty areas, including graphic design, interior design, and industrial design. Design services are used in everything from film and technology to manufacturing and architecture. The most basic form of design includes the preparation of graphics and images for websites, marketing materials, logos, and signage, along with numerous other business needs. The more technical side focuses more on design for physical space, objects and processes including building interiors, user interfaces, industrial systems, and consumer product design. The Creative Design sector, like all Professional Services, is driven by availability of skilled talent.

### **Engineering Services**

Engineering Services encompass professional businesses that provide contracted applied engineering services in a range of fields, including structural, mechanical, industrial, electrical, and other engineering fields. These engineering experts are critical to constructing, upgrading, and maintaining complex modern manufacturing facilities and machinery, designing buildings, and supporting a range of physical activities. Engineering businesses tend to cluster in proximity to their primary clients – manufacturers, builders, and utilities. This sector hires employees with advanced degrees – at a minimum bachelor's degree holders and often master's. As a result, engineering firms frequently choose locations with a high quality of life to aid employee retention and attraction.

### **Software & Information Technology**

Software & IT includes organizations and individuals in software design and publishing, custom computer programming, computer systems design, and data processing facilities management. Data storage and utilization and cyber security are some of the major growth areas for this sector as the amount and sensitivity of data online increases exponentially. Software and IT is a very enterprising sector with small and medium-sized firms representing almost 99% of the industry.



# Professional Services

## LOCAL SALES MESSAGES

- Georgetown is part of the Austin Metro – one of the most dynamic centers of Professional Services in the country. Although Professional Services jobs are currently less concentrated in Georgetown, the industry is growing more rapidly locally than the entire region, state, or nation.
- Georgetown is a highly attractive place to live, and employers widely report that recruiting outside talent to Georgetown is an easy task. Given the industry's emphasis on talent availability and quality of place, Georgetown provides a competitive location to recruiting and retain skilled workers.
- Georgetown is already home to many individuals employed in Professional Services who currently work for employers located outside of the city. Employers opening, expanding, or relocating to Georgetown can potentially draw from this wealth of existing local talent – in addition to a pool of more than 75,000 workers to the South.
- Georgetown is already home to a large share of professionals who work from home or small startups.
- The City continues to make strategic investments in infrastructure and quality of life assets that make Georgetown an attractive place to live. The city benefits from a large, vibrant arts community; a unique downtown; extensive, high-quality parks and trails; and an overall attractive built and natural environment.
- In addition to the Georgetown Municipal Airport, the city has relatively easy access to Austin Bergstrom International Airport – both of which are positive assets for business travelers and executives in Professional Services.
- Current residents of Georgetown hold very positive views of their community. As one resident observed, Georgetown has the perfect mix of history, industry, and livability. The city is also multi-generational and engaged – with an active volunteer population across ages – an attractive feature to many professionals.

# Professional Services

## GEORGETOWN WORKFORCE

Professional Services supportive workers are much more concentrated in the Georgetown South Labor Shed than the North. The South Labor Shed has over 75,000 workers in occupations that support Professional Services, while the North Labor Shed has slightly under 5,000. Across both labor sheds, the largest category of Professional Services workers available to employers in Georgetown are Software Developers & Programmers and Engineers.

### GEORGETOWN **NORTH** LABOR SHED – 2016

INDUSTRY SUPPORTIVE WORKERS      AVERAGE HOURLY \$

Engineers	1,022	\$46.02
Software Developers	769	\$48.12
Computer Specialists	733	\$25.15
Drafters / Eng. Techs.	610	\$27.90
Database & System Admin.	405	\$40.53
Art & Design Workers	387	\$17.64
Computer & Info. Analysts	366	\$41.14
Misc. Computer Occs.	277	\$37.26
Architects, Surveyors, Carts.	109	\$30.14
Computer & Info Research Sci.	32	\$41.94

### GEORGETOWN **SOUTH** LABOR SHED

INDUSTRY SUPPORTIVE WORKERS      AVERAGE HOURLY \$

Software Developers	21,533	\$45.79
Engineers	11,958	\$49.54
Computer & Info. Analysts	10,188	\$41.23
Computer Specialists	9,421	\$25.76
Drafters / Eng. Techs.	7,531	\$29.67
Database & System Admin.	7,375	\$45.82
Art & Design Workers	3,744	\$25.25
Architects, Surveyors, Carts.	1,830	\$33.66
Misc. Computer Occs.	1,433	\$40.93
Computer & Info Research Sci.	494	\$47.25

# Research & Development

Research & Development (R&D) involves targeted efforts to innovate, introduce, and improve a product or process. Companies invest in R&D to maintain their competitiveness, to develop new products, or to identify new markets or uses for existing products. As the US economy has become increasingly knowledge based, the number of R&D jobs has continued to increase. During the past 15 years, private R&D employment has increased three times faster than the US average for all industries.

R&D expenditures by US businesses currently exceed \$340 billion annually. Such spending is disproportionately concentrated in a handful of industries and locations. Just two industries – Manufacturing and Software/IT – account for more than 80% of domestic R&D expenditures. Additionally, half of all R&D spending in the US is absorbed by five states, including Texas.

**Manufacturing** R&D is focused primarily on the improvement or development of systems, machines, processes, and/or products. Manufacturing accounts for more than two-thirds of R&D expenditures in the US, dominated by the Chemical and Computer/ Electronic Products sectors.

Research and Development is a sustaining factor in the **Life Science** industry with activities spanning from drug development and delivery to the application of bio-tech research. Pharmaceuticals alone represent 16% of all US R&D expenditures.

Software and IT dominate the **Professional Services** industry with more than \$63 billion in annual R&D expenditures. Primary activities include product development and application.





THE CITY OF  
*GEORGETOWN, TX*  
MARKET ASSESSMENT





# *TABLE OF CONTENTS*

CITY OF GEORGETOWN, TEXAS





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# WHY

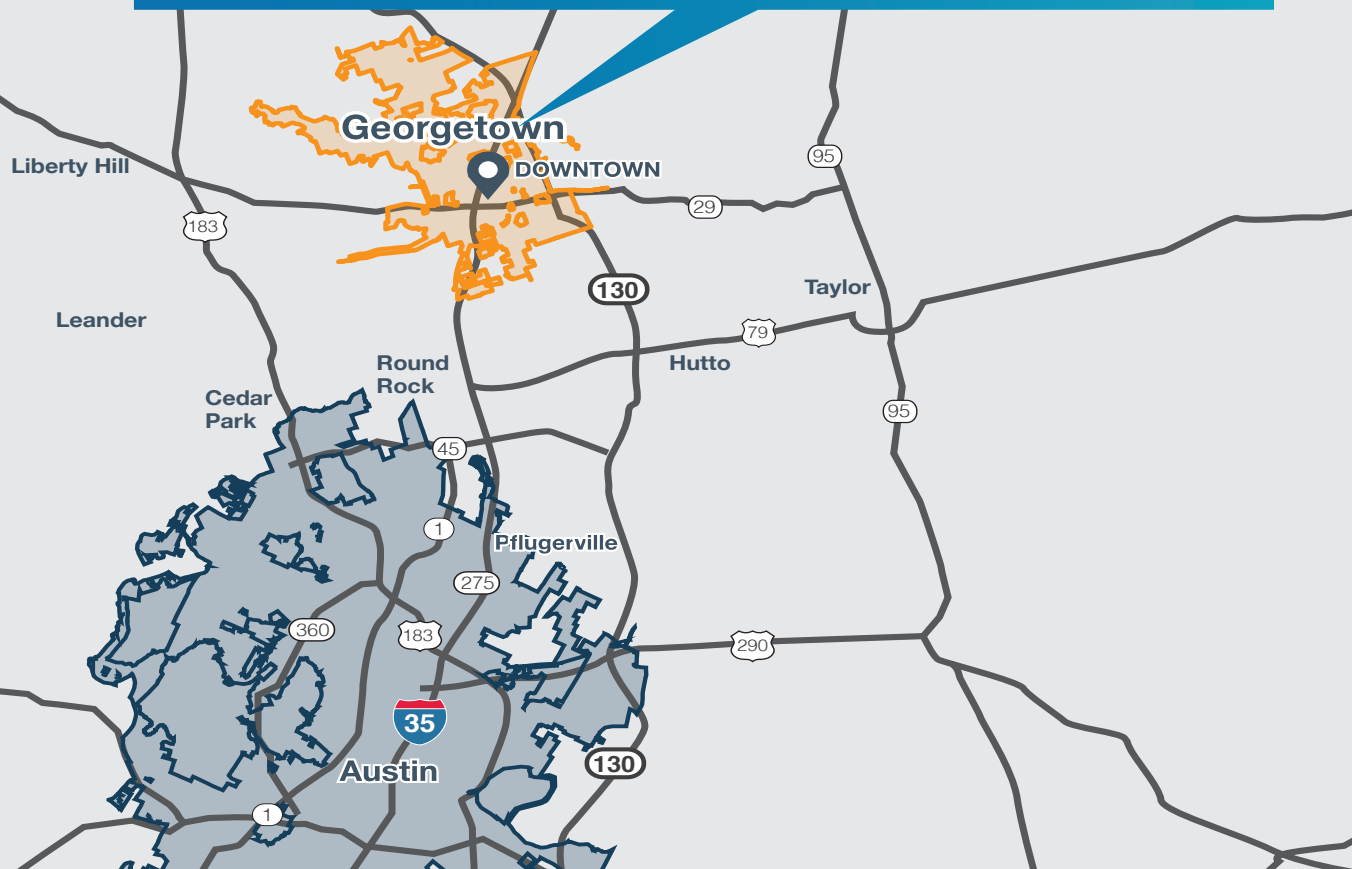
# CHOOSE

# GEORGETOWN?

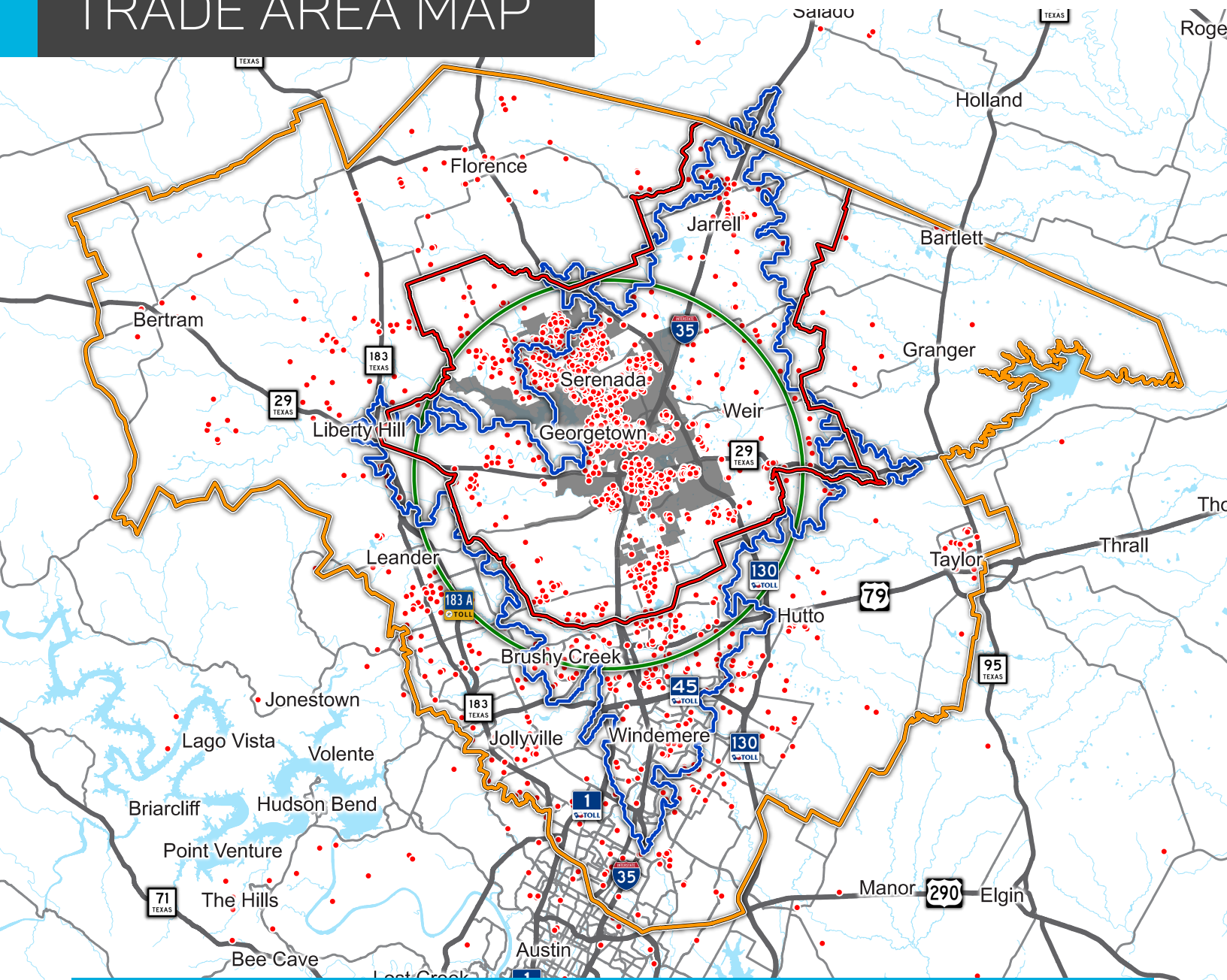
*Located 27 miles north of Austin, and within one of the Nations most dynamic markets, Georgetown is experiencing unprecedented growth. The US Census Bureau declared Georgetown the fastest growing city in the U.S. amongst cities with populations greater than 50,000, in 2016.*

*Georgetown boasts “The Most Beautiful Town Square in Texas” with a small town feel that’s capable of satisfying any big city appetite. Georgetown’s downtown is the center of the city’s commercial and municipal hub.*

*Georgetown has direct frontage on Interstate 35 and SH 130, which provides regional access in a dynamic market with first-class mixed-use retail and commercial opportunities.*

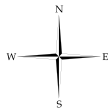


# TRADE AREA MAP



## METHODOLOGY

### Georgetown, Texas

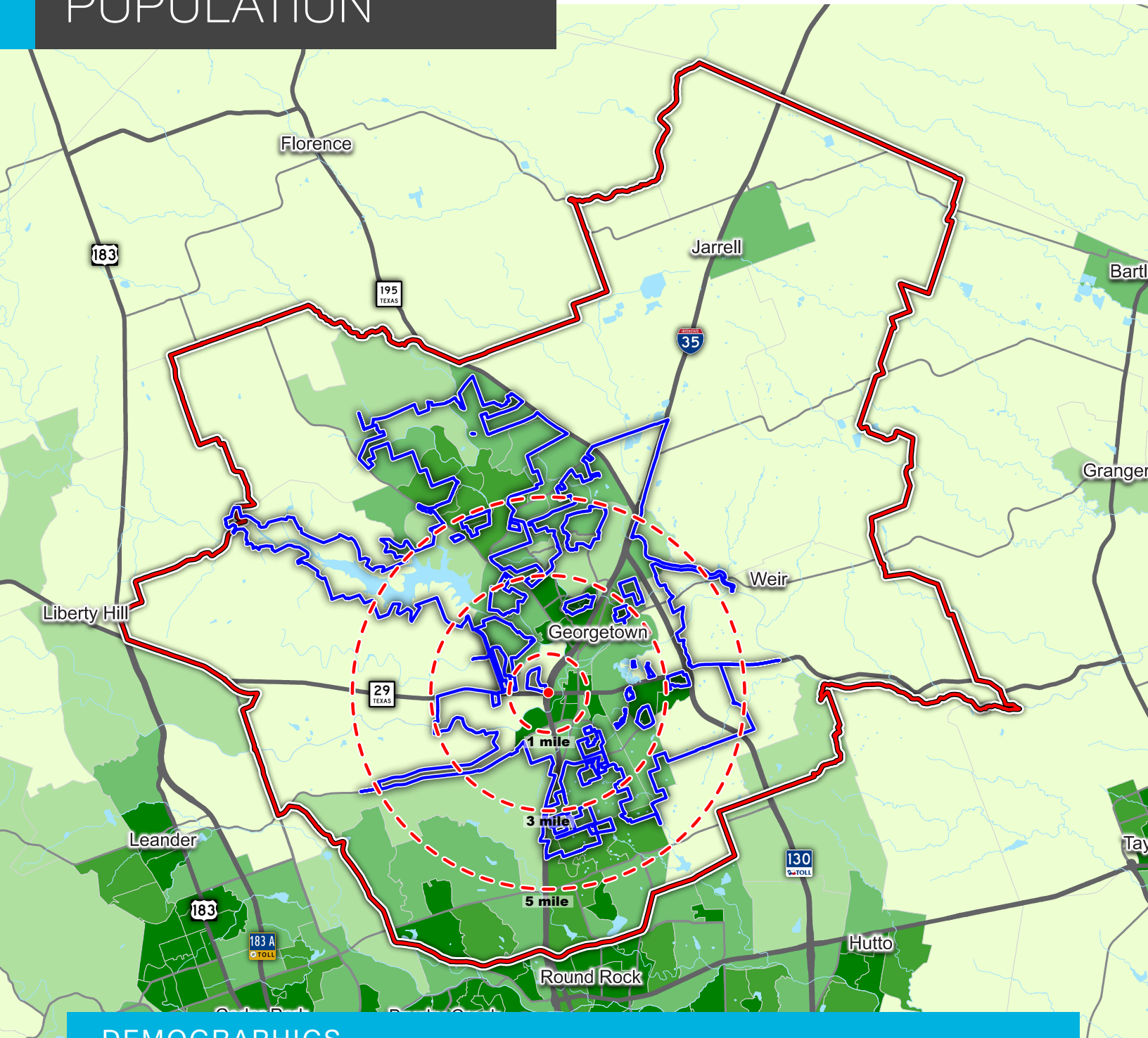


#### Trade Area Distribution

- ▬ Primary Trade Area  
(65% Catchment)
  - ▬ Secondary Trade Area  
(85% Catchment)
  - ▬ 24 Minute Drive Time  
(65% Catchment)
  - ▬ 9 Mile Ring  
(63% Catchment)
  - City Limits
  - Customer Samples (2,546)
- Source: Catalyst Commercial

To develop a baseline for Georgetown's market, Catalyst conducted a customer intercept study that included over 2,650 samples, of which 2,546 were unique. These samples were collected from various retailers throughout the city of Georgetown including; Downtown, The Rivery, and Wolf Ranch Town Center. These samples were geocoded to develop a Primary and Secondary Trade Area. Catalyst used an 85% capture rate to define the Secondary Trade Area for Georgetown. The Primary Trade Area is defined by a 65% capture rate, which equals a 24 minute drive time, or a 9 mile ring.

# POPULATION



## DEMOGRAPHICS

	1 mile	3 miles	5 miles	Georgetown	PTA
2016 Population	5,462	30,649	61,310	57,958	134,031
2021 Population	5,814	33,720	69,310	66,911	153,973
% Growth 2016 - 2021	6.4%	10.0%	13.0%	15.4%	14.9%
Daytime Employees	5,176	15,270	20,727	24,564	30,994
Households	1,936	10,819	21,754	22,856	49,043

W University Ave & I-35 serves as the study point.

### Georgetown, Texas



#### Population Density by block group

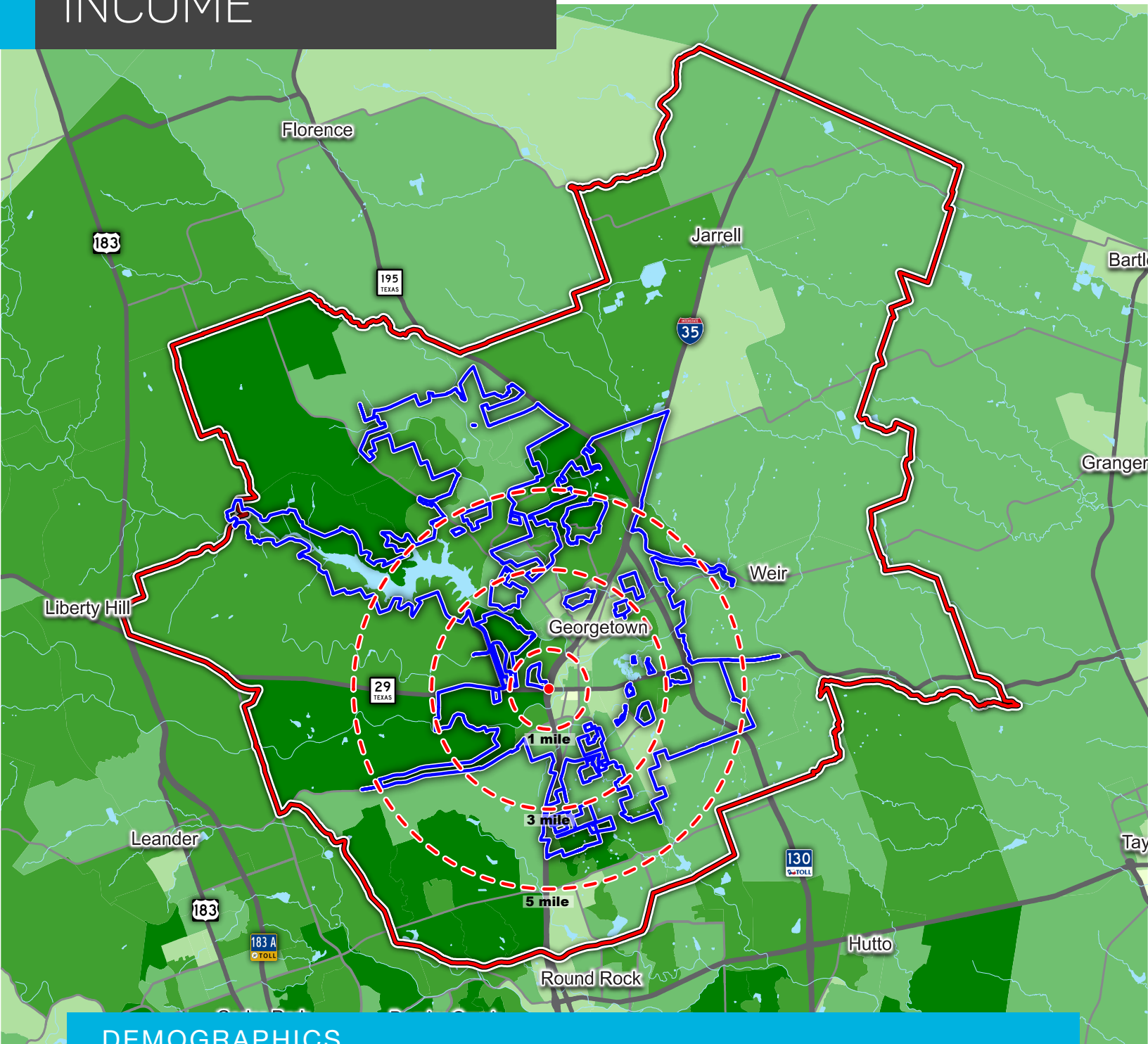
- Less than 250
- 250 to 500
- 500 to 1,500
- 1,500 to 2,500
- Greater than 2,500

- City Limits
- Primary Trade Area
- Study Point

Source: STI, Catalyst Commercial



# INCOME



## DEMOGRAPHICS

### Georgetown, Texas



#### Median Household Income by block group

- Less than \$25,000
- \$25,000 to \$50,000
- \$50,000 to \$75,000
- \$75,000 to \$100,000
- Greater than \$100,000

City Limits

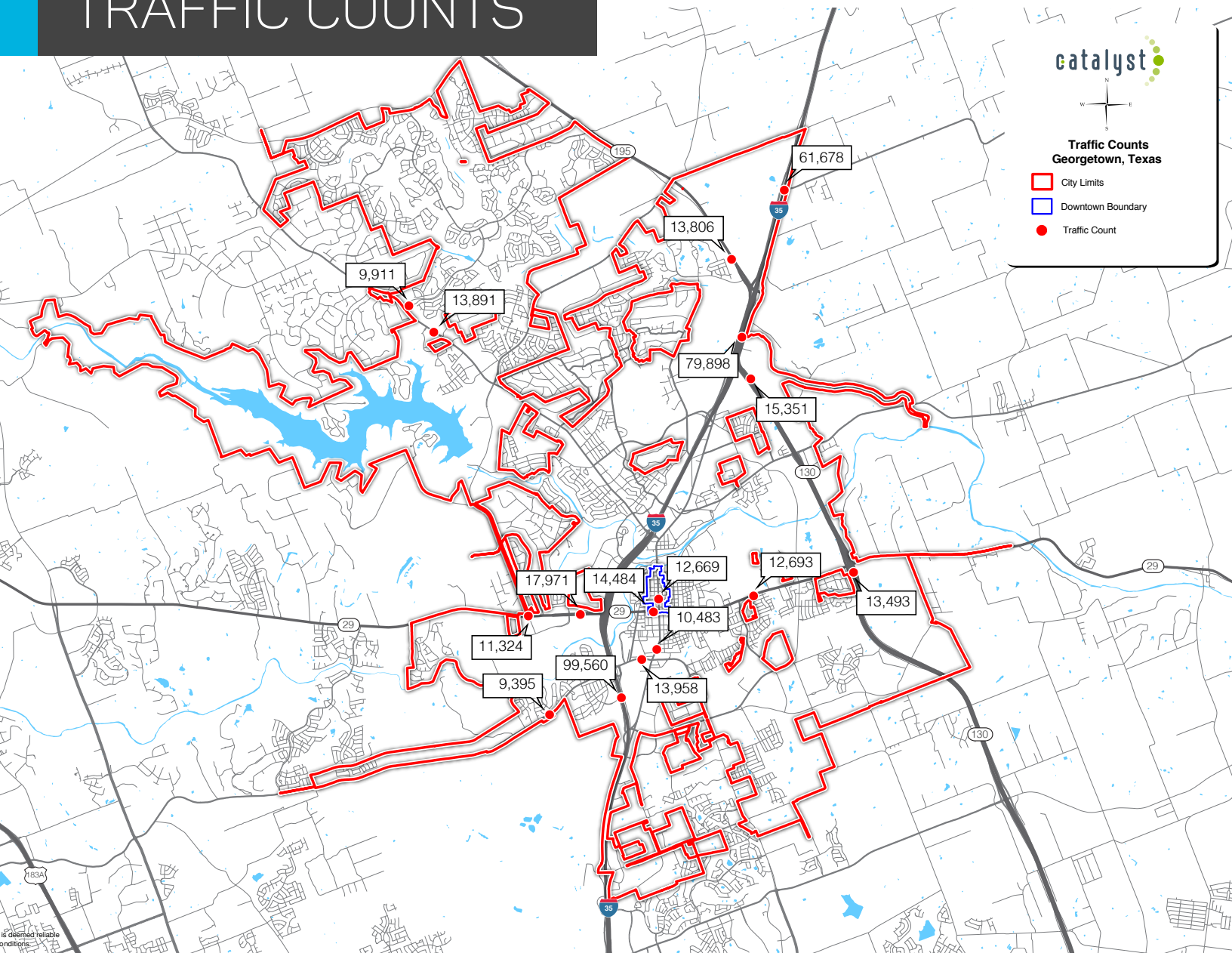
Primary Trade Area

Study Point

Source: STI, Catalyst Commercial

	1 mile	3 miles	5 miles	Georgetown	PTA
Median HH Income	\$50,566	\$60,430	\$73,061	\$66,968	\$78,988
Average HH Income	\$59,273	\$70,586	\$86,081	\$86,450	\$93,176
% HHs w/ Income < \$25,000	34%	20%	15%	14%	13%
\$25,000 - \$50,000	23%	23%	20%	21%	18%
\$50,000 - \$75,000	16%	21%	19%	20%	18%
\$75,000 - \$100,000	10%	13%	14%	15%	15%
> \$100,000	17%	23%	32%	30%	36%

# TRAFFIC COUNTS



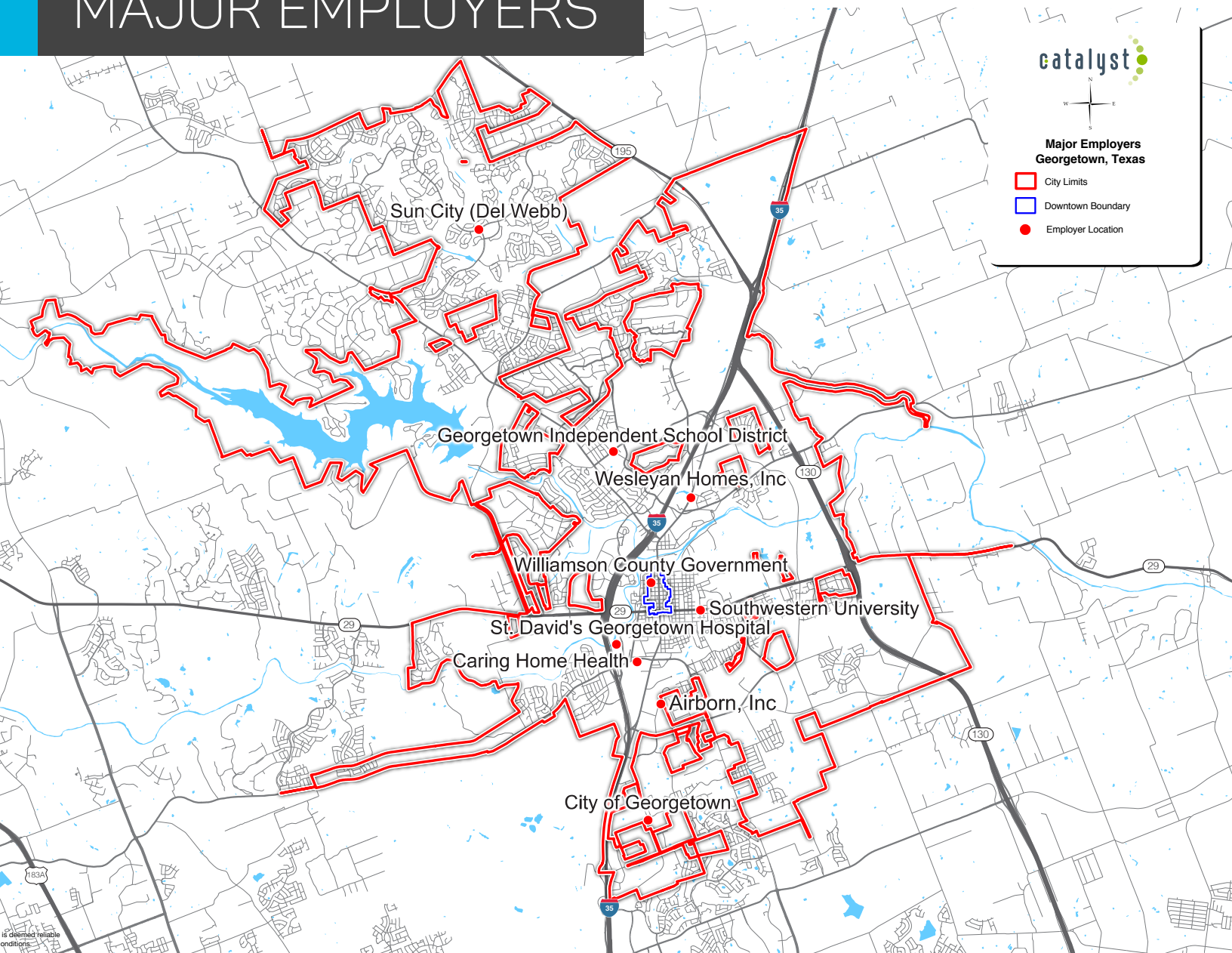
## TRAFFIC COUNTS

LOCATION	COUNT
Leander Rd at River Ridge Dr	9,395
Del Webb Blvd at Andice Rd	9,911
S Austin Ave at W 21st St	10,483
D B Wood Rd at Co Rd 265	11,324
S Austin Ave at W 9th St	12,669
E 12th St at Summercrest Dr	12,963
SH195 at Airport Rd	13,806
Williams Dr at Andice Rd	13,891

LOCATION	COUNT
SH130 at SH29	13,943
Leander Rd at Railroad Ave	13,985
W 12th St at Rock St	14,484
TX 130 Svc Rd at Co Rd 152	15,351
W University Ave at Co Rd 265	17,971
I-35 at Pvt Rd 917	61,678
I-35 at SH195	79,898
I-35 at Leander Rd	99,560



# MAJOR EMPLOYERS

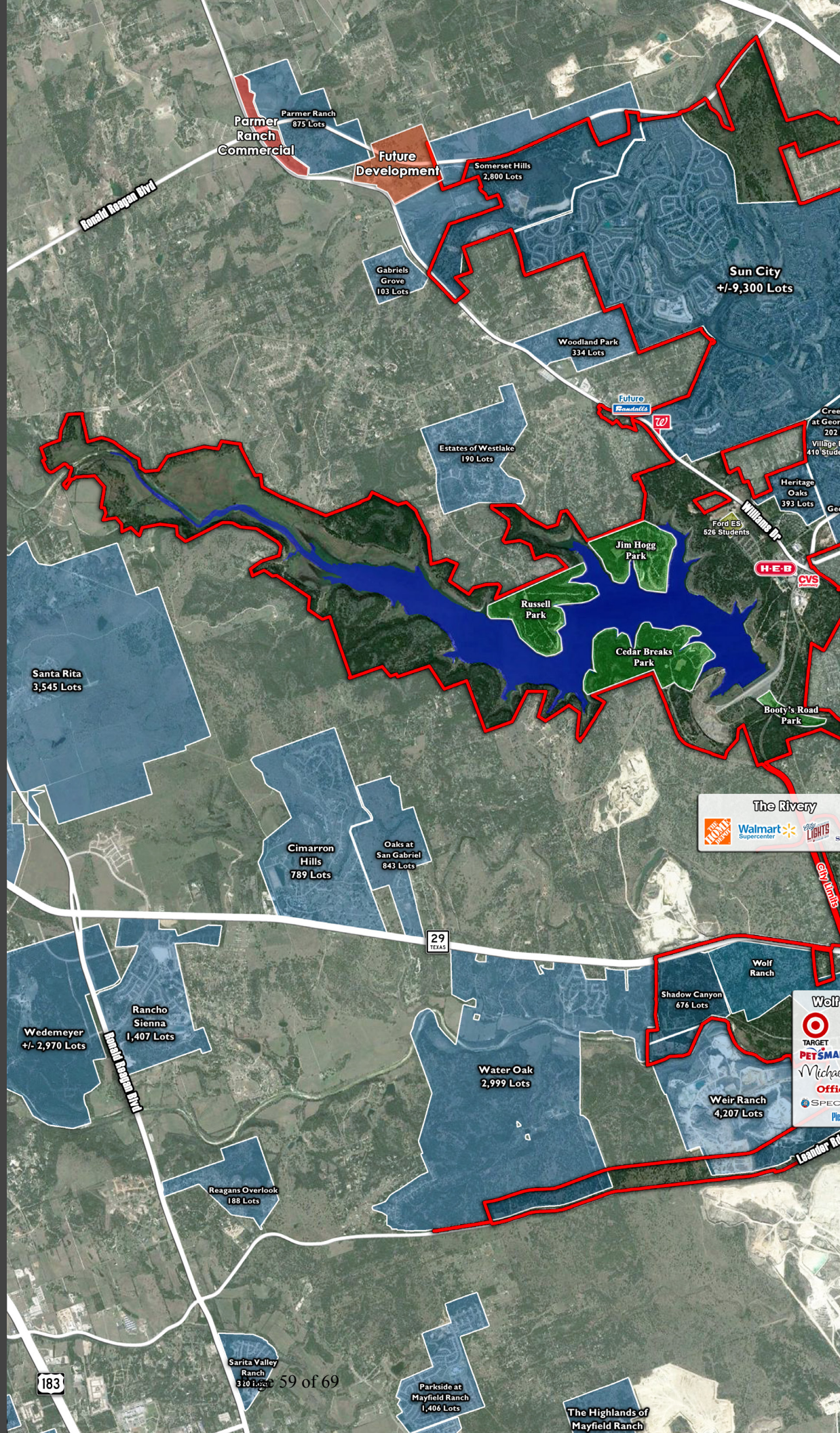


## MAJOR EMPLOYERS

Company	Employees	Address
Williamson County Government	1582	405 Martin Luther King St #14, Georgetown, TX 78626
Georgetown Independent School District	1550	603 Lakeway Dr, Georgetown, TX 78628
City of Georgetown	682	113 E 8th St, Georgetown, TX 78626
St. David's Georgetown Hospital	512	2000 Scenic Dr, Georgetown, TX 78626
Airborn Interconnect, Inc	482	3500 Airborn Cir, Georgetown, TX 78626
Southwestern University	450	1001 E University Ave, Georgetown, TX 78626
Wesleyan Homes, Inc	340	1811 N Austin Ave #201, Georgetown, TX 78626
Caring Home Health	269	504 Leander Rd, Georgetown, TX 78626
Sun City (Del Webb)	170	1501 Sun City Blvd, Georgetown, TX 78633

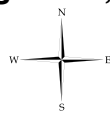






# 2016 AERIAL

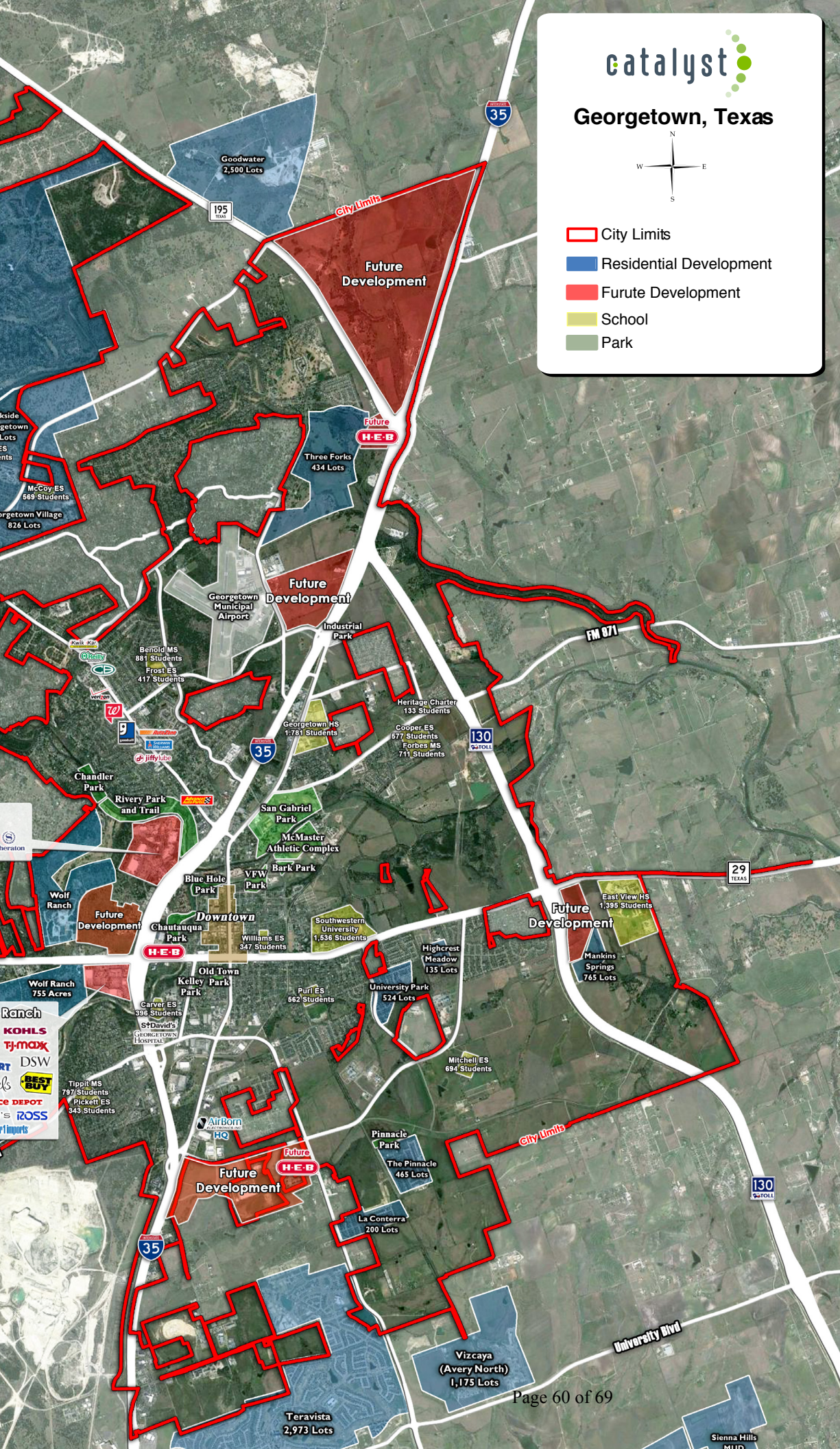




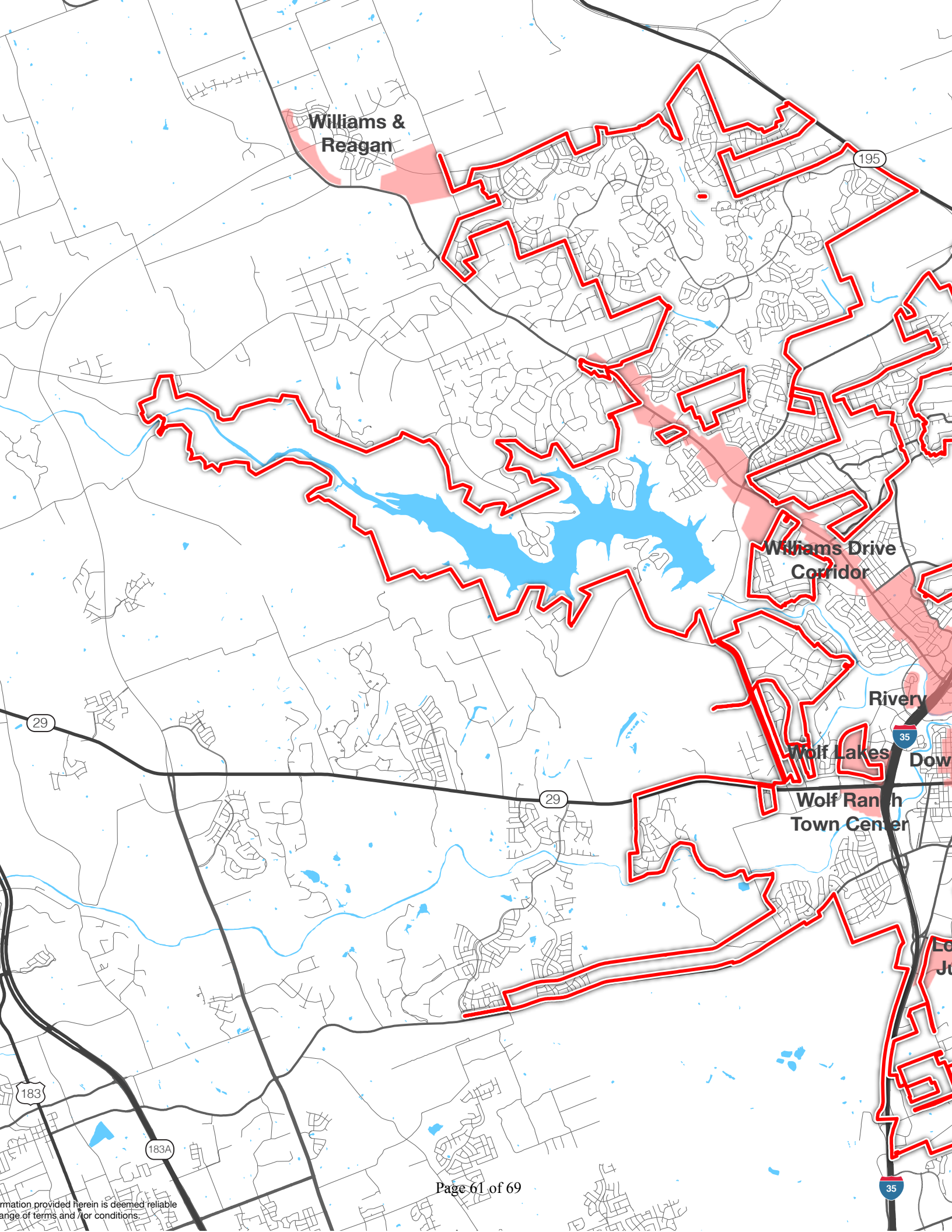
## Georgetown, Texas



-  City Limits  
 Residential Development  
 Future Development  
 School  
 Park







# MAJOR RETAIL

## **Williams & Reagan**

This area is prime for retail/commercial uses, located near Sun City, Somerset Hills and other emerging developments in the northwest sector.

## **Williams Drive Corridor**

Williams Drive is Georgetown's primary commercial corridor and contains some of the greatest gravity for national convenience retail, grocers and office.

## **Pecan Branch**

Pecan Branch is located just off of I-35 and Lakeway Drive and is Georgetown's newest emerging commercial .

## **The Rivery**

The Rivery is a first-class mixed use district with high-end townhomes, hotel and conference center, and regional retail. Phase 2 consist of high end lifestyle retail and destination restaurants.

## **Wolf Lakes & Wolf Ranch Town Center**

Wolf Lakes is a planned mixed-use project just north of Wolf Ranch, a regional retail outdoor mall. Wolf Lakes is being planned for destination retail, first-class restaurants, hospitality, and Class A office.

## **Downtown**

Downtown is a national award-winning commercial district with destination restaurants, boutiques and unique shops.

## **Longhorn Junction**

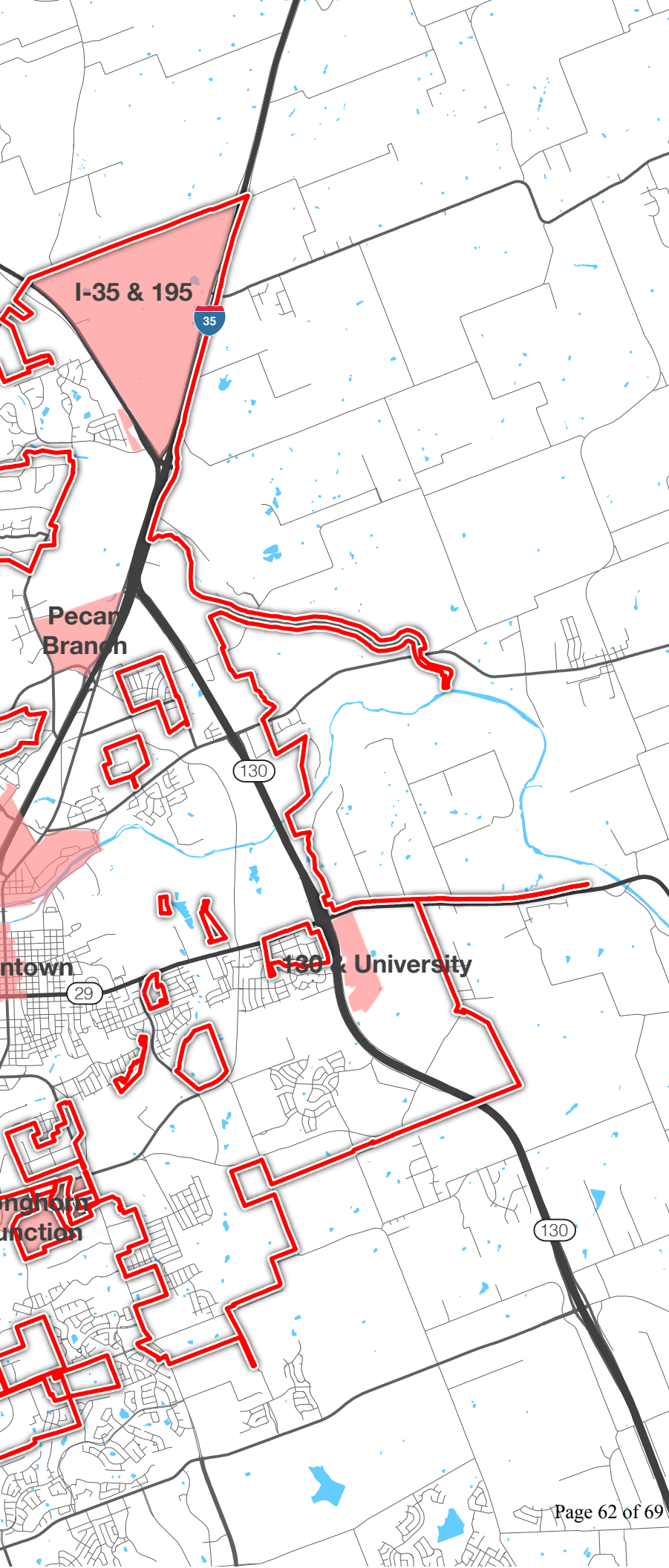
Longhorn Junction is located within Georgetown's ETJ, and is planned for over 600,000 square feet of destination retail and mixed-use.

## **130 & University**

This area is situated for regional retail to service east Georgetown and the 130 corridor.

## **I-35 & 195**

This area is situated for mixed-use and commercial to service the northern portion of Georgetown the neighboring communities along the I-35 corridor. HEB has purchased a tract just South of I35 & 195 for a grocer and associated retail.



# 2016 RETAIL DEMAND

## Potential Supportable Retail Square Footage By Retail Category

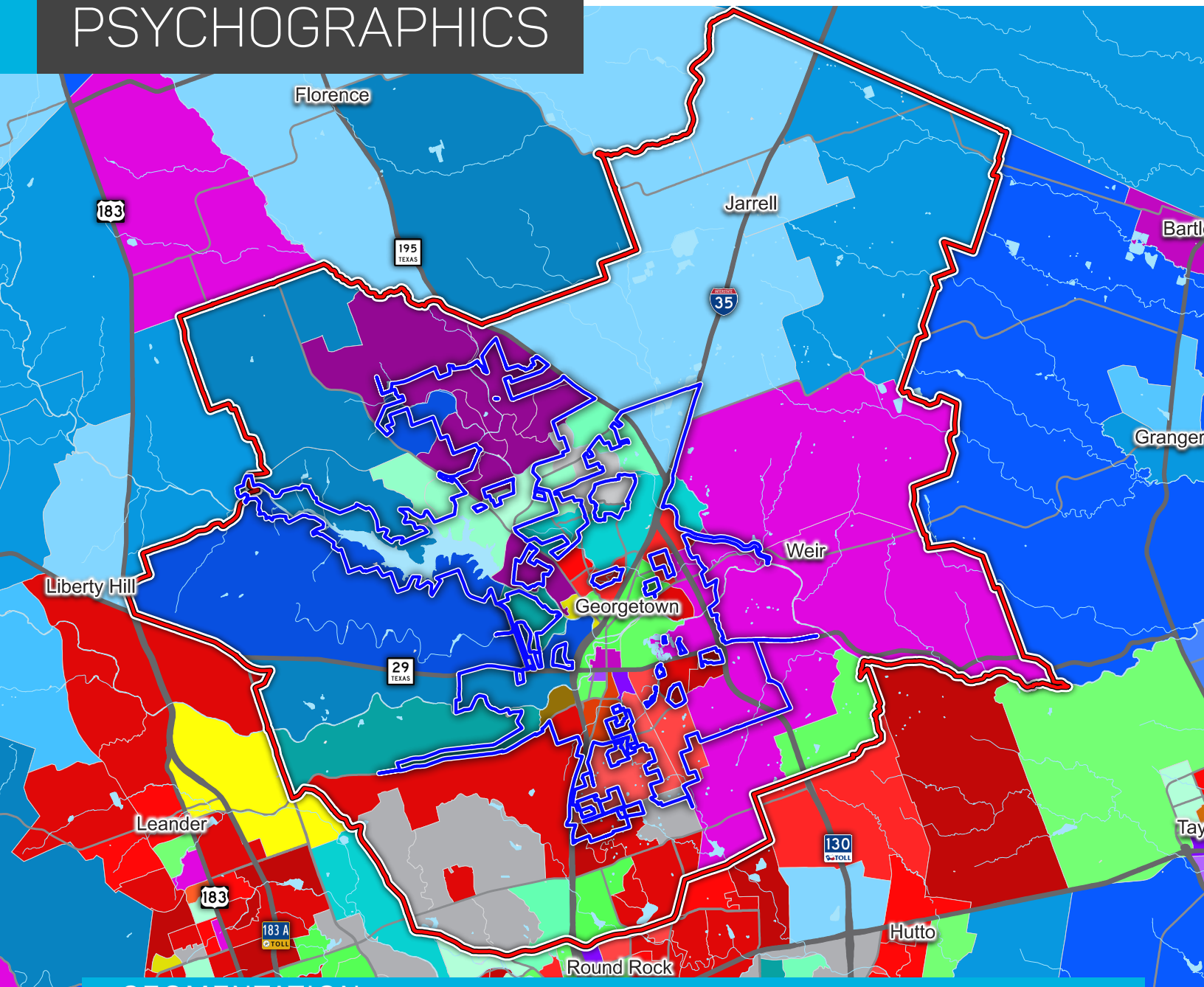
(Note: Residential-generated retail demand only takes into account the *unmet* retail demand by retail category)

Category	Student Demand	Workforce Demand	Commuter Demand	Visitor Demand	Residential Demand	2016 Total Demand	2016 Total Supply	2016 Leakage "Retail Gap"
Auto Parts, Accessories & Tire Stores	433		1,028		39,960	41,421	31,447	9,974
Furniture Stores					79,907	79,907	224,593	-
Home Furnishings Stores					45,187	45,187	35,531	9,655
Electronics & Appliance Stores					205,985	205,985	217,554	-
Bldg Material & Supplies Dealers					189,361	189,361	283,732	-
Lawn & Garden Equip & Supply Stores					17,981	17,981	19,599	-
Grocery Stores	532	8,095	3,680	5,300	460,798	478,405	597,644	-
Specialty Food Stores					102,952	102,952	46,474	56,478
Beer, Wine & Liquor Stores					37,277	37,277	54,336	-
Health & Personal Care Stores	353	15,621		12,863	209,881	238,718	285,838	-
Gasoline Stations		21,930	12,854	37,648	143,214	215,645	187,367	28,278
Clothing Stores	151	2,913	1,413	4,811	121,913	131,200	235,082	-
Shoe Stores	277	4,005	2,590	14,258	45,567	66,697	154,770	-
Specialty Retail (i.e. Jewelry, Luggage & Leather Goods Stores)	132	3,052		6,790	39,808	49,781	49,471	311
Sporting Goods/Hobby/Musical Instr Stores		1,736	1,295		89,841	92,872	91,291	1,581
Book, Periodical & Music Stores			1,295		27,895	29,190	15,158	14,032
Department Stores Excluding Leased Depts.		5,207			674,115	679,322	358,684	320,638
Other General Merchandise Stores		24,032	1,942		327,160	353,134	37,130	316,004
Florists			1,295		6,453	7,748	3,726	4,022
Office Supplies, Stationery & Gift Stores		5,875	1,295		27,103	34,272	33,947	325
Used Merchandise Stores			2,590		64,090	66,680	29,532	37,148
Other Miscellaneous Store Retailers			1,807		140,456	142,262	454,482	-
Full-Service Restaurants	333	7,634	2,178	10,662	144,158	164,965	94,028	70,937
Limited-Service Eating Places	302	10,281	3,085	15,105	157,208	185,980	102,232	83,748
Special Food Services					4,238	4,238	566	3,671
Entertainment	24	-		6,718		6,742	-	6,742
Lodging				36,661		36,661	-	36,661
Drinking Places - Alcoholic Beverages					17,686	17,686	2,169	15,516
<b>Total Demand (SF)</b>	<b>2,535</b>	<b>110,380</b>	<b>38,345</b>	<b>150,815</b>	<b>3,420,193</b>	<b>3,722,267</b>	<b>3,646,383</b>	<b>1,015,721</b>

Source: ESRI, Catalyst Commercial



# PSYCHOGRAPHICS



## SEGMENTATION

### Crème de la Crème

- Empire Builders
- Grand Masters
- Marquis Class
- American Knights
- Urban Squires
- Regents

### Urban Cliff Climbers

- Charmed Life
- Sitting Pretty
- Kindred Spirit
- Middle of the Road
- White Collar Status
- Blue Collar Starts

### Urban Cliff Dwellers

- Social Whirls
- Managing Business
- Nest Builders
- Gainfully Employed
- Strapped

### Seasoned Urban Dwellers

- Gray Eminence
- Fall Years
- Still in the Game

### Thriving Alone

- Gurus
- Wizards
- Apprentices

### Going it Alone

- Hard Act to Follow
- SM seeks SF
- Solo Acts
- Down But Not Out

### Struggling Alone

- Urban Moms
- Apron Strings
- Solemn Widows

### Single in the Suburbs

- Educated Earners
- Suburban Singles
- Hard Hats/Hair Nets

### Married in the Suburbs

- Bonds and Babies
- Great Generations
- Couples with Capital
- Kith and Kin
- Sublime Suburbia

### Retired in the Suburbs

- Stocks and Scholars
- Marmalade and Money
- Stately Suburbs

### Living with Nature

- Country Villas
- Pastoral Vistas
- Terra Firma
- Stock in Trade
- Rough and Ready
- The Outback
- Cornucopia

### Working With Nature

- Land Barons
- Fertile Acres
- Breadbasket
- Farmers Circle
- Crops and Tractors

### Harlem Gateway

- Harlem Gentry
- East Side
- Upper East Side
- Lower East Side
- Between Jobs

### Espaniola

- Anos de Quincenera
- Los Padres
- Los Novios
- Los Padrinos
- Los Solteros
- Los Trabajadores

### Specialties

- Golden Heritage
- East Meets West
- Group Quarters
- Doublewides
- Centurions
- Legacy Years
- Collegian

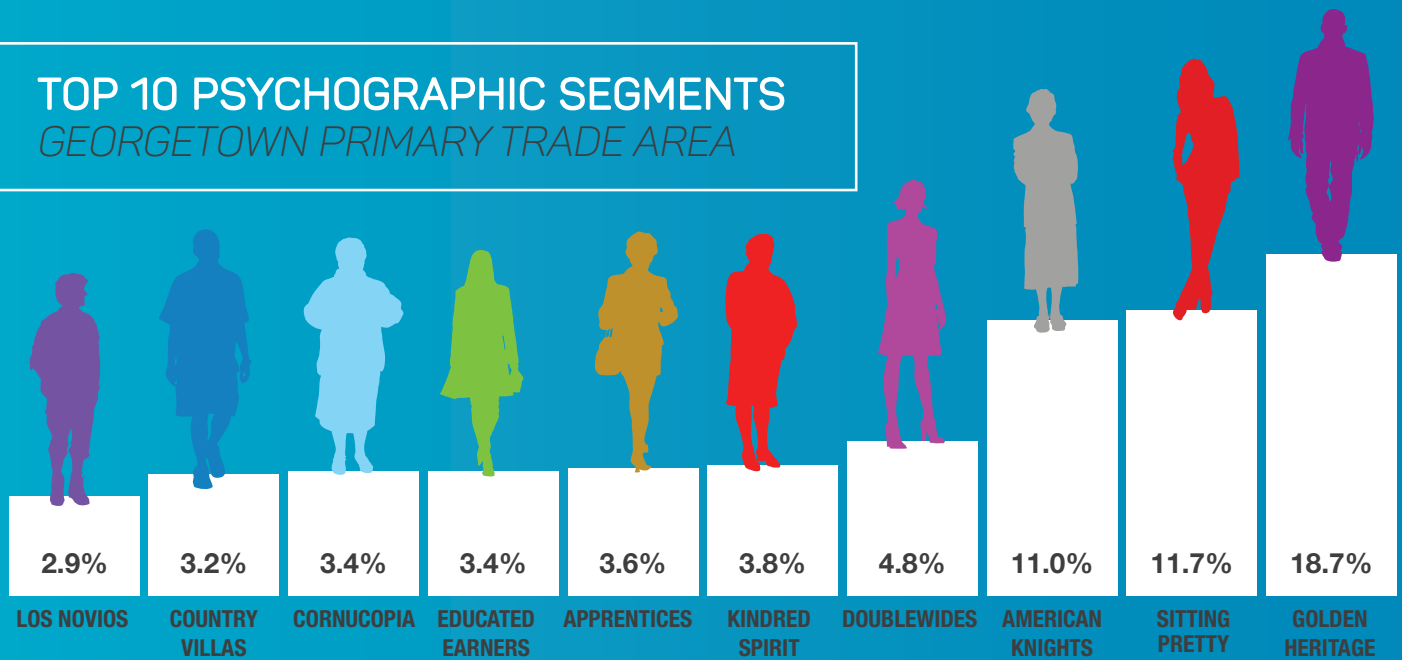
### Unspecified

- Unspecified



# TOP 10 PSYCHOGRAPHIC SEGMENTS

## GEORGETOWN PRIMARY TRADE AREA



1

### GOLDEN HERITAGE

When you think of senior citizens in America there are typically two images that come to mind. One is of very well off older citizens living comfortably, usually by the ocean, having the money both for a nice primary residence and for frequent vacations (perhaps in a comfortable recreational vehicle), playing shuffleboard or cards, and basically enjoying their post- working years to the hilt. The other image is less appealing: of older Americas struggling to make ends meet and waiting each month for their social security checks to arrive. Market segmentation analytics bear out the reality of both of these images. And Golden Heritage segments are neighborhoods that are home to the former: in other words, the senior citizens living the good life in places like Florida, Arizona, and other appealing climates. The media age of these residents is 50s to low-60s. But they also show a nearly four- times-average number of people over 65-years-old. These seniors are living comfortably on incomes in the median-range of the \$50,000s and \$60,000s. Much of their income is from social security and retirement (two-and-a-half-times-above-average). However, they also have a 75-percent-above-average level of interest/dividend income. Some of these seniors are still working at white-collar jobs in areas like management, professional and sales positions. There are many married-couples, but few children living in Golden Heritage neighborhoods. Obviously due to the residents' advanced years, these neighborhoods have a 50-percent-above-average level of widows and widowers.

2

### SITTING PRETTY

Among the Urban Cliff Climbers neighborhoods that are home to the backbone of America's workforce are the Sitting Pretty segments. This group is young (20s to 30s), but enjoying good income levels (between \$50,000 and \$60,000). Their relatively high earnings range comes from middle-class white-collar jobs in several occupations, including management, protective services, personal care, sales, office administration, and repair services. Their higher- than-average salaries keep them and their mostly newborn to 13-year-old children very comfortable in their urban abodes, in all probability surrounded by all of the creature comforts required to please all of the senses — from big-screen-high-def TVs to fully equipped SUVs. With good college educations and good jobs, the Sitting Pretty residents have earned their comforts they enjoy.

3

### AMERICAN KNIGHTS

American Knights are the "youngsters" of the highly urban Crème de la Crème category of neighborhood segments. Not only is the median age range in the 20s and 30s, but also these areas have an above-average number of children below the age of six. These characteristics correlate to the higher-than- average number of married-with-children-under-18 households. Though young, these urban neighborhoods are home to higher-than-average number of earners in white-collar management and professional occupations. These mostly college-educated residents enjoy incomes in the \$70,000s and \$80,000s, largely from salaries and wages. They also earn incomes at a slightly-higher-than-average level from interest/dividends. However, unlike many other Crème de la Crème neighborhoods, who have higher self- employment income levels, the American Knights residents are just at the national average in this measurement.

4

### DOUBLEWIDES

In America there tends to be a particular stigma attached to living in mobile homes and mobile home parks. In fact, many people chose this lifestyle as a preference for several reasons, including mobility and low-cost housing. In fact, the median income of residents of Doublewides neighborhoods is a very respectable high-\$30,000s and \$40,000s. Doublewides are areas where mobile homes dictate the lifestyles of the residents, who share a median age in the 30s. While residents in Doublewides do have a higher-than- average level of income from public-assistance, many others are hardworking Americas, with a higher-than-average representation in several manual-labor blue-collar occupations, including farming/fishing/forestry (nearly three-times-average), construction (75-percent-above-average), repair services (over-50-percent-above-average), transportation (50-percent-above-average), and production (nearly 50-percent-above- average). These occupations are a reflection of the residents' low educational achievements: There is an over-50-percent-average number of people with less-than- high-school educations. However, 25-percent-above-average have high-school degrees. Also owing to their residents' ages, these areas have slightly more younger children than older. They tend to have married-couple households, but also have a nearly 50-percent- higher-than-average number of single-fathers.

5

### KINDRED SPIRIT

Kindred Spirits are home to people who keep America humming — because they are the ones doing the work, as well as their fair share of the spending. The residents of these Urban Cliff Climber neighborhoods are 20- to 30-years-old, married with- children of all ages (but slightly more in the younger ranges), earning between \$40,000 and \$50,000, enjoying some years of college education, and employed in a cross-section of the nation's middle-class occupations. These residents earn an income slightly above the national-average in a wide range of jobs, such as protective services, food preparation, personal care, sales, office administration, construction, and repair services. With kids to raise and relatively good incomes, Kindred Spirits no doubt enjoy a big slice of classic middle-class life.

## TOP 10 PSYCHOGRAPHIC SEGMENTS CONT.

### GEORGETOWN PRIMARY TRADE AREA

- 6 APPRENTICES**

Sharing the spotlight in the illustrious emerging single-by-choice-or-circumstance demographic are the residents of the highly urban Apprentices neighborhoods. These areas are home to the youngest residents of the Thriving Alone category. They are dominated by single people in their 20s and low-30s without children, who are alone primarily because they've never been married. In fact, Apprentices rank at almost three-times-the-national-average in non-family households. Owing to their young age, it's too early to tell if the Apprentices' dwellers will remain single, but for now they are living the good life with incomes in the \$50,000s and \$60,000s. You can imagine this group being able to, on a whim, drop off their briefcases in their well-decorated homes and take off for a weekend at the shore or on the slopes. These overriding college-educated segments' residents generate their income from white-collar management and professional occupations. They earn less from interest/dividends than other Thriving Alone sectors, but this will likely change as the segment matures.
- 7 EDUCATED EARNERS**

Residents of Educated Earners segments are an anomaly: They have a relatively high level of college education (50-percent-above-average) and are employed in a slightly above-average level of professional, white-collar jobs, yet their annual income is only in the \$30,000s and \$40,000s. Contributing to this relatively low-income level could be their young age, which is in the 20s and low-30s. However, they could also be held down by their relatively high rate of single-parent households. This Single in the Suburbs segments has a 50-percent-higher-than-average level of single parents (both male and female) with children, especially kids under six years old. Some of the singles have never been married (50-percent-above-average) and a slightly lower divorce rate. One could easily presume that because these suburbanites have a 50-percent-above-average level of college education and an average level of employment in fields such as management, sales, and office support, they may one day work their way into a higher income level. However, reaching that goal may mean moving out of the suburbs and into a city.
- 8 CORNUCOPIA**

Like the patchwork of freshly plowed fields, rows of crops, and seas of wheat blowing in the wind that you might see out the window of a plane as you fly over a typical rural area in America, the Cornucopia is a patchwork of rural communities that don't fit into any of the other segments. This group of Living With Nature segments is young: the residents range from 20- something's to the low-30s. This group of mixed demographics is primarily married-with-children, but they have even more children than the other segments. They have the least educated demographic in this segment, with close to 50-percent-higher-than-average percent without even high-school degrees. These segments are home to a well-above-average number of self-employed individuals, and a similarly high-level of people seeking public assistance. They are not easily pegged on income levels, since the median household income is too broad to classify without misleading market researchers. However, the Cornucopia segments are a pretty solidly blue-collar bunch, working in areas such as construction, repair services, production, and transportation. But while they rank at or near 50-percent-above-average in these jobs, they rank at a spectacular four-times-the-national-average in the category of farming, fishing, and forestry.
- 9 COUNTRY VILLAS**

If you're single and looking for a partner, don't drive out to Country Villas rural neighborhoods: They are overriding home to married couples. These residents share demographics that make them perfect partners in living the good life in the country. Residents in these Living With Nature areas are predominately in their 30s, college-educated, employed in white-collar management and other professions, rather than the more common blue-collar rural occupations. What's more, Country Villas' residents are members of one of the highest-income levels in rural environs — the \$70,000s and \$80,000s. With all of this going for them, living must really be good in their sparsely populated areas. But that's not all of their advantages: Country Villas also rank high in entrepreneurs earning self-employment income (50-percent-higher-than-average) and smart investors earning nearly the same level of interest/dividend income. These good income levels are helping to support a slightly above-average number of children, especially ages six to seventeen.
- 10 LOS NOVIOS**

Los Novios neighborhoods are neighborhoods with the highest percentage of married-with-children households. So their Spanish name, which means "newlyweds" is a perfect fit. What's more the median-age range of residents is in the lowest category — 20s and low-30s. Fittingly, these areas rank highest in children under six at nearly 75-percent-above-average. While many of the residents are married, there are also above-average levels of single-parent households: with the highest level (interestingly) in single-male-with-children at over 75-percent-above-average. The highly urban Los Novios areas share several demographics with their fellow Espaniola segments, including a high percent of residents without high-school educations (three-times-the-national-average); median household incomes too broad to classify without misleading market researchers; and high rankings on income from public assistance (three-times-above-average). However, the residents also rank at an average-level of income from their predominantly blue-collar jobs. They rank extremely high in five occupations: farming/fishing/forestry (a whopping seven-times-the-average), building maintenance (two-and-a-half-times-average), construction and production (both at nearly two-times-average), and transportation (about 75-percent-above-average).



## Georgetown Economic Development Department

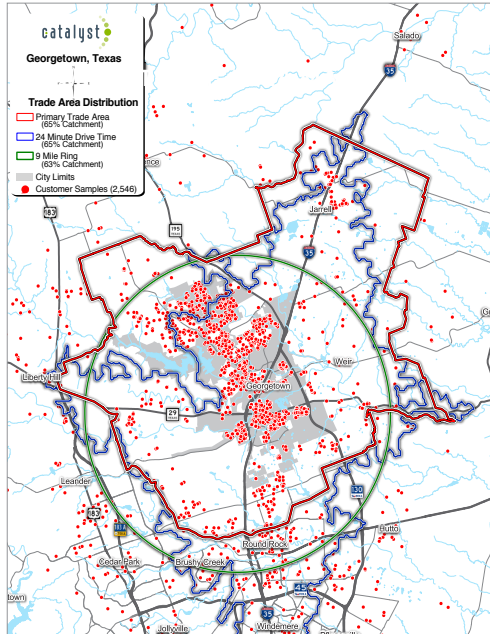
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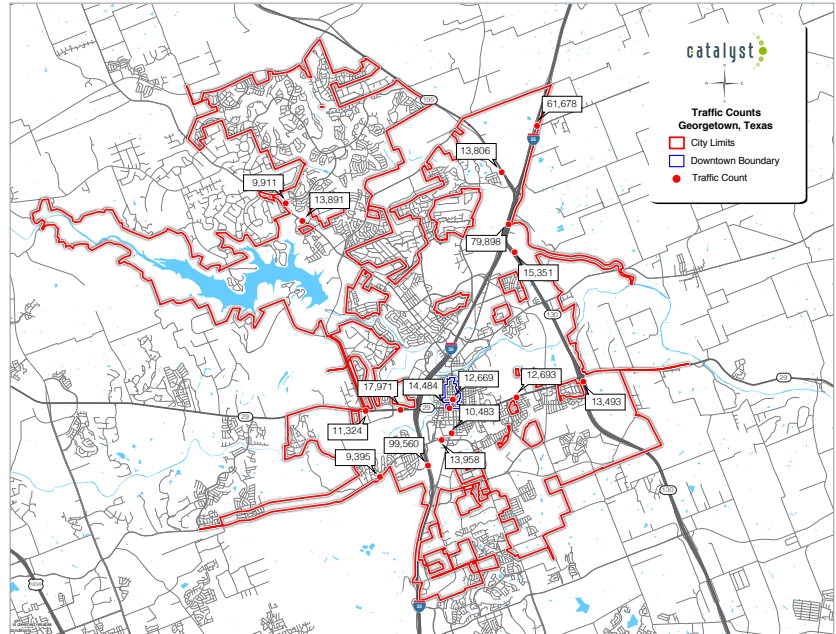
Georgetown is located in Williamson County, Texas, just north of Austin. Georgetown ranks first in the nation in terms of growth amongst peer communities with over 50,000 people. Georgetown further benefits from being located in the Austin-Round Rock metropolitan area, which ranks as one of the fastest growing metro areas in the United States.

Both the Primary Trade Area (PTA) and City of Georgetown have high median household incomes. The median household incomes are \$78,988 and \$66,968, respectively.

### PRIMARY TRADE AREA MAP



### TRAFFIC COUNT MAP



### RETAIL PRIMARY TRADE AREA STATISTICS

RACE	2016
White	70.4%
Black	4.0%
Asian	3.2%
Other	1.8%
Hispanic (Any Race)	20.5%

INCOME	2016
Average Household	\$93,176
Median Household	\$78,988
% Owner Occupied Housing	75.6%

GENERATION DISTRIBUTION	2016
Generation Z (0 - 18 years)	25.4%
Millennials (18 - 35 years)	18.2%
Generation X (35 - 55 years)	26.1%
Baby Boomers (55 - 75 years)	22.0%
Silent Generation (75 + years)	8.4%

OVERVIEW	YR	PTA	CITY
Population	2016	134,031	57,958
	2021	153,973	66,911
Median Age	2016	41.2	45.6
Median HH Income	2016	\$78,988	\$66,968
	2021	\$83,824	\$77,603
Households	2016	49,043	22,856
Household Size	2016	2.7	2.4

TRAFFIC COUNTS	VPD
I-35 at Leander Road	99,560
West University Avenue at Co. Road 265	17,971
TX 130 Service Road at Co. Road 152	15,351
West 12th Street at Rock Street	14,484
Leander Road at Railroad Avenue	13,985
SH 195 at Airport Road	13,806

EDUCATION	2016
Educational Base - 25 +	87,726
Less than High School	7.5%
High School Graduate or GED	19.9%
Some College, no Degree	21.9%
Bachelor's Degree	27.1%
Master's Degree	11.2%



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# NOTES



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