

The logo for Garner Economics LLC features the company name in a white sans-serif font. A vertical line separates 'Garner' from 'Economics LLC'. Below 'Economics LLC' is the tagline 'solutions that work' in a smaller, lowercase sans-serif font.

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solutions that work

A Competitive Realities Report and Target Industry Strategy for Lockhart, Texas

July 2020

Prepared for the:

City of Lockhart
ECONOMIC DEVELOPMENT CORPORATION

Resolution 2020-23

**A RESOLUTION OF THE CITY COUNCIL OF LOCKHART, TEXAS
ADOPTING A TARGET INDUSTRY STRATEGY REPORT; PROVIDING
AN EFFECTIVE DATE**

WHEREAS, in January, 2020, the City of Lockhart (“City”) and the Lockhart Economic Development Corporation (“LEDC”) retained Garner Economics, LLC to assist in preparing a “Competitive Realities Report and Target Industry Strategy” in order to assist the City and the LEDC to focus its economic development priorities to help create jobs in the Community by focusing efforts that leverage the community’s assets and strengths.; and

WHEREAS, the TIS prepared by Garner Economics, LLC is complete and has been reviewed by the Board and staff of the LEDC; and

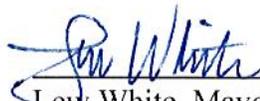
WHEREAS, it is the desire of the City Council of Lockhart, Texas to approve and adopt the TIS;

NOW THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF LOCKHART, TEXAS, that:

1. The foregoing recitals are adopted and incorporated herein for all purposes.
2. The report titled “Competitive Realities Report and Target Industry Strategy” prepared by Garner Economics, LLC, a copy of which is attached hereto, is hereby approved and adopted as the Target Industry Strategy for the LEDC.

ADOPTED AND APPROVED effective on this, the 8th day of October 2020.

City of Lockhart:



Lew White, Mayor

ATTEST:

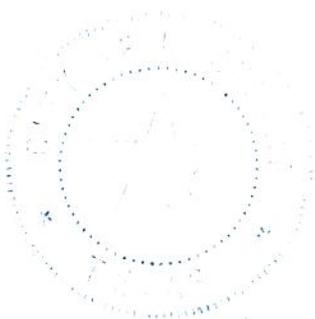


Connie Constancio, City Secretary

APPROVED AS TO FORM:



Monte Akers, City Attorney



**RESOLUTION 2020-01 OF THE BOARD OF DIRECTORS OF THE
LOCKHART ECONOMIC DEVELOPMENT CORPORATION
ADOPTING A TARGET INDUSTRY STRATEGY REPORT; PROVIDING
AN EFFECTIVE DATE**

WHEREAS, in January, 2020, the City of Lockhart (“City”) and the Lockhart Economic Development Corporation (“LEDC”) retained Garner Economics, LLC to assist in preparing a “Competitive Realities Report and Target Industry Strategy” in order to assist the City and the LEDC to focus its economic development priorities to help create jobs in the Community by focusing efforts that leverage the community’s assets and strengths.; and

WHEREAS, the TIS prepared by Garner Economics, LLC is complete and has been reviewed by the Board and staff of the LEDC; and

WHEREAS, it is the desire of the Board of Directors of the LEDC to approve and adopt the TIS;

NOW THEREFORE, BE IT RESOLVED BY THE BOARD OF DIRECTORS OF THE LOCKHART ECONOMIC DEVELOPMENT CORPORATION, that:

1. The foregoing recitals are adopted and incorporated herein for all purposes.
2. The report titled “Competitive Realities Report and Target Industry Strategy” prepared by Garner Economics, LLC, a copy of which is attached hereto, is hereby approved and adopted as the Target Industry Strategy for the LEDC.

ADOPTED AND APPROVED effective on this, the 14th day of September 2020.

**LOCKHART ECONOMIC
DEVELOPMENT CORPORATION:**



Steven Lewis, President

ATTEST:



Michael Kamerlander, Executive Director

Table of Contents

Executive Summary.....	3	Chapter 5: Labor Force & Employment	25
Chapter 1: Dashboard Summary	5	Labor Force & Unemployment	25
Demographic, Labor & Economic Indicators	5	Labor Force Participation.....	26
Assets & Challenges Assessment.....	Error! Bookmark not defined.	Labor Force Participation – Families.....	27
Optimal Targets	7	Self-Employment	28
Chapter 2: Stakeholder Engagement	6	Startups.....	28
Chapter 3: Assets & Challenges Assessment	9	Labor Force Draw.....	29
Access to Markets.....	9	Commuting Patterns.....	30
Labor.....	10	Commuting Trends	31
Lockhart’s Economic Development Initiatives	10	Job Growth	32
Access to Space	10	Estimated Annual Wages.....	32
Access to Capital.....	11	Estimated Annual Wages (<i>continued</i>).....	33
Government Impact on Business	11	Industry Sector Composition	34
Quality of Place.....	11	Colleges & Universities	35
Chapter 4: Demographics & Community Trends ...	12	Degrees & Certifications	36
Population Trends	13	Chapter 6: Local Specialization & Growth	37
Age Distribution.....	14	Major Industry Sector Change	37
Change in Age Distribution	15	Industry Earnings.....	39
Diversity.....	15	Major Occupational Change	41
Migration/Geographic Mobility.....	16	Occupational Earnings	43
Educational Attainment.....	17	Major Industry Sector Specialization & Growth	45
Educational Attainment Trend	17	Occupational Specialization & Growth	47
Secondary School Performance: Graduation Rates.....	18	Chapter 7: Optimal Targets	49
Secondary School Performance: ACT & SAT Scores	18	Chapter 8: Recommendations	67
Household Income.....	20	Asset Development/Execute Effectively.....	68
Household Income Change.....	21	Communicate the Brand.....	71
Per Capita Income	21	Chapter 9: Call to Action.....	72
Poverty	22	Acknowledgments	72
Cost of Living	22	Garner Economics	72
Crime Rates.....	23	Appendix A Detailed Survey Responses	73
Air Service.....	23	Appendix B: Industry Details	81
Broadband Access & Speed	24	Appendix C: Occupational Details.....	83
		Appendix D: Index of Figures & Tables.....	97
		Appendix E: Assets & Challenges Notes	98

Intro & Executive Summary

In January 2020, the City of Lockhart (City) and its Economic Development Corporation (EDC) retained Garner Economics, LLC to help craft a **COMPETITIVE REALITIES REPORT AND TARGET INDUSTRY STRATEGY** to focus its economic development priorities.

This engagement compiled data, analyzed qualitative and quantitative factors that impact the area’s competitiveness as a business location, and offers observations for the EDC to understand the optimal targets that exist for the City and the value the region offers to those targets.

The resulting Target Industry Strategy (TIS) details the product improvement and marketing to the targeted industries needed to ensure that the City strengthens its competitive position.

The goal of the TIS is to help Lockhart attract and retain businesses that will create jobs by focusing efforts that leverage the community’s assets and strengths.

Specifically, the scope of services for the overall project included:

- A comprehensive and holistic assessment of key forces driving Lockhart’s economy;
- An Assets & Challenges Assessment (A&C) of Lockhart and Caldwell County from the perspective of a site-location advisor that facilitates investment decisions;
- Recommendations for business targets suitable for Lockhart to pursue, based on our research and analysis; and finally,
- A set of implementable recommendations that the EDC and other organizations may use to enhance the economic vitality of Lockhart.

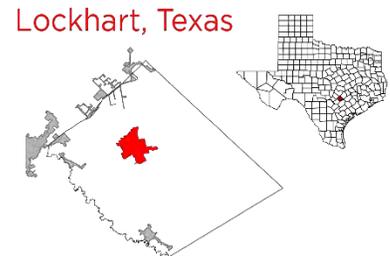


Figure 1: Project Process



Assets & Challenges Assessment (A&C)

Garner Economics conducted an A&C (sometimes referred to as a SWOT analysis) of Lockhart and Caldwell County. This was done through a comprehensive tour of the area that assessed the City against a predetermined list of investment factors. The evaluation was taken from a site-selection perspective. Garner Economics assessed the area based on the qualities, elements, and infrastructure that a business would examine when evaluating a location as a place for its operations or as an investment. The A&C is both an objective and subjective evaluation of the area. The assessment allows us to document challenges that exist in the community that constitute potential barriers for successful targeted business recruitment to occur. By knowing what challenges or gaps exist, the region can take the steps necessary to mitigate the situation, strengthen its overall “product,” and be a more attractive business location for the targets. Likewise, by knowing its strengths, the EDC can better leverage them in efforts to attract businesses.

Stakeholder Input

As a complement to the assessment of the physical structure of the City, Garner Economics conducted an electronic survey to the City’s key economic development stakeholders. The purpose was to solicit perceptions of the area’s business climate from the City’s economic development partners’ perspective. We also reviewed the City’s most recent 2020/2021 Strategic Priorities document, of which items related to the development of new product (industrial parks), and, customer service to the City’s residents and investors are addressed as recommendations in this report (Chapter 8).

Target Industries Strategy (TIS)

The analysis in the above-mentioned workstreams revealed that the City has many assets upon which to build. The TIS identifies and provides the rationale for the target sectors that will both diversify the industry mix in the area as well as build on current areas of strengths. These targets are “best fits” for the area and are recommended, given the attributes and assets of the City as a whole.

The description of and rationale for the targets detailed in Chapter 3 will help the EDC prioritize marketing resources and will identify areas where policymakers can act to increase the area’s competitive position in attracting and retaining these business sectors.

The identified target business sectors are listed at right.



Auto Parts, Metal & Electronic Mfg.



Food & Beverage Processing



Logistics & Distribution



Pharmaceutical, Medical Supplies & Medical Device Mfg.

Recommendations

Chapter 8 offers a set of implementable recommendations that will help Lockhart and the EDC focus efforts to attract high-quality companies and talent. The recommendations reflect items that the City should undertake to highlight its value proposition to companies looking to invest in the area as well as tactics the EDC can use to leverage strengths and effectively market the City to the recommended targets.

Asset Development/Execute Effectively	Communicate the Brand
What Lockhart needs to do to have the assets and infrastructure in place that will allow the City to compete globally in the attraction and retention of business and implement effectively.	Tell the Lockhart Story globally to attract both talent and investment.

Chapter 1: Dashboard Summary

Demographic, Labor & Economic Indicators



Positive 15

- Age Distribution
- Diversity
- Secondary School: Graduation Rates
- Household Income Change
- Poverty
- Crime Rates
- Cost of Living
- Air Service
- Labor Force & Unemployment
- Labor Force Families
- Labor Force Draw
- Job Growth
- Estimated Annual Wages
- Industry Sector Composition
- Degrees & Certifications



Neutral 10

- Population Trends
- Change in Age Distribution
- Migration/Geographic Mobility
- Commuting Patterns
- Commuting Trends
- Educational Attainment Trends
- Household Income
- Per Capita Income
- Broadband Access & Speed
- Colleges & Universities



Negative 5

- Educational Attainment
- Secondary School: ACT & SAT Scores
- Labor Force Participation
- Self-Employment
- Startups

Chapter 2: Stakeholder Engagement



Community input is a vital part of the strategic planning process. Feedback from stakeholders provides a context around the data accumulated in Phase I of the project and is a way to validate conclusions. Similarly, the input often raises issues or nuances that are critical to understanding the community; these insights may or may not be discernible through desktop research and on-site tours.

Therefore, Garner Economics developed a survey for the City's economic development stakeholder community to solicit feedback on the business climate in the City. The survey was open April 13-30, 2020, and was completed by 31 people.

The comments below summarize the key themes that were probed in the survey. For questions that were not open-ended, respondents were given the option of providing further comments. Appendix A provides more detail about the survey responses.

Note: The comments below are summarized from the selected answers or open-ended text responses to the survey. The responses are reported as they were offered; they may not necessarily be statements of fact but could be opinions or perceptions.

1. Words That Describe Lockhart

When asked to choose among a set of words to describe Lockhart, survey respondents most frequently noted *growing* (34%) and *historical* (28%). Additional comments suggest that there are at least two camps within the stakeholder group. Some describe the City in rather glowing terms. They provided comments that note the friendliness of the City and the City's support of businesses. Other respondents note that building regulation is too restrictive.

The responses also suggest that stakeholders see the need for the City to be proactive in how Lockhart grows. Commenters noted its status as a commuter community and suggested the need to create jobs in the City so people can live and work there.

2. Strengths and Weaknesses

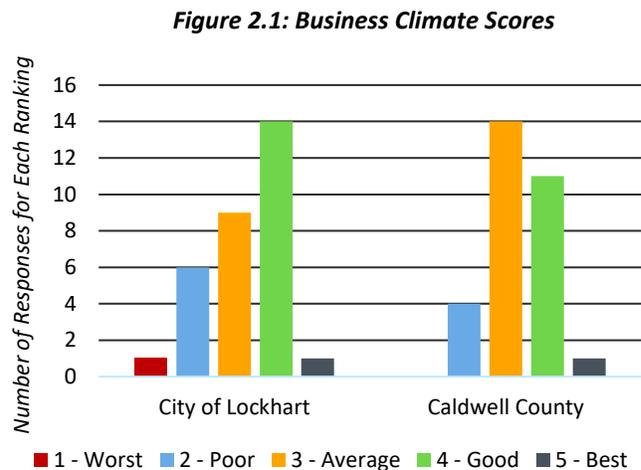
Respondents were asked to list up to three obstacles or challenges they see in the City's ability to attract, expand, or retain business and investments. The most-noted sentiments included frustration with regulations, processes, and costs of doing business in the City; the lack of housing options; and the lack of a plan to accommodate or enhance growth. The lack of available space or sites, the lack of an educated or motivated workforce, and a perception of an anti-growth sentiment within the community were also noted.

Respondents were later asked to choose from a list of five options to indicate what they believe are Lockhart's strengths. The City's location and proximity to other Texas cities and Austin-Bergstrom International Airport were most frequently noted.

3. Business Climate

Survey respondents were asked to rank the City of Lockhart and Caldwell County on their business climate, with “1” being the worst and “5” being the best. Business climate was defined as “those policies and laws enacted by the local governments, that impact businesses in Lockhart (either positively or negatively).”

All 31 respondents provided a score for Lockhart. The average score was 3.26. (3.0 is considered average.) Thirty of the survey respondents provided a score for Caldwell County. The average score was 3.30.



4. Labor and Optimal Company Mix

Respondents were asked to choose from a list of five options to reflect their thoughts of the current labor situation in the area in terms of both quality and availability. Having a small, local labor pool and a lack of available skilled labor were the two most frequently chosen responses. In addition to the options provided, respondents noted that there is a lack of “good” jobs currently available and the area lacks workforce training coordination.

Survey respondents were also asked to choose between a set of seven types of companies that they believe would be a good fit for Lockhart. Of the seven, *Manufacturing* was listed by the most responses, followed by hospitality and high-tech companies.

5. Infrastructure in the City

Survey respondents were asked to note which areas of the City’s infrastructure are weak or lacking. Mirroring some of the responses provided in the question above regarding obstacles, 42% of the respondents noted that roads and public transportation are an issue, followed by 25% noting internet and broadband as lacking. Within the write-in comments, respondents noted several areas of the City’s soft infrastructure, such as the lack of a hospital and healthcare (noted in seven of the 11 comments), educational facilities, and amenities for residents.

6. Community Vision

When asked what could be done to change the community if one need not worry about money or politics, several of the open-ended responses addressed the need to support and improve the public schools. Other responses noted by more than one respondent included the community managing and embracing change, strengthening and being more innovative in the City’s economic development efforts, ensuring that whatever change takes place benefits all citizens, improving the community’s quality of place, and working to increase community pride.

7. Initiatives That Are Having or Could Have a Positive Impact on Lockhart

Respondents were asked to note initiatives currently underway to improve the City. The large majority of responses pointed to programming and events that bring the community together and raise the attractiveness of living in the City. Several respondents noted the work that the schools are doing to improve the children’s education and better prepare them to enter the workforce.

Similarly, respondents were asked to list programs in peer/competitor cities or regions that Lockhart should consider. The responses also centered around ways to increase community pride (e.g., main street activities in other communities). Austin, Bastrop, and Pflugerville examples were provided.

8. Impacts of COVID-19 and Ways the City Can Help

Nearly 90% of the respondents (25 of the 28 answering the question; three chose the option “Non-applicable”) said that they expect that their business will be able to regain profitability at some point this year. When asked what the City can do to help companies return to profitable operations, the two responses offered were to open restaurants and to balance the housing inventory in the City so people could live there and make it easier to attract industry.

9. Other Issues to Consider

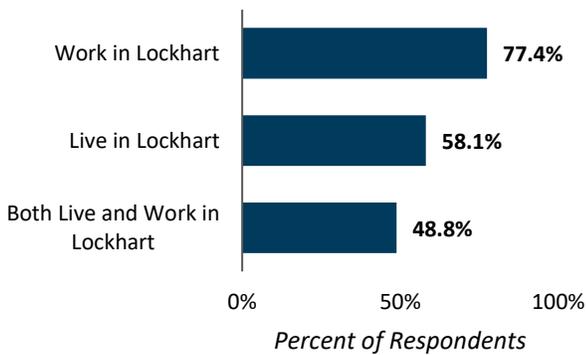
The final question of the survey asked respondents whether there are other issues that should be considered in forming the economic development strategy. The responses suggested balancing the economic growth and the quality of place of the City and ensuring that the resulting strategy is known by all. A few responses suggested other ways to incentivize companies to move to the City.

Appendix A provides further detail on the survey responses. Figures 1.2 and 1.3 describe the perspectives of survey respondents.

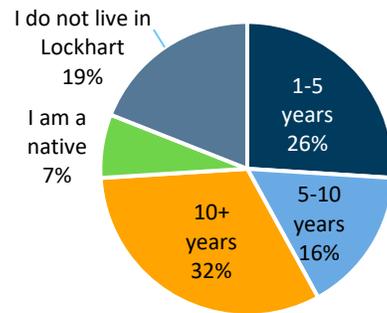
Figure 2.2: Survey Responses

A. Survey Respondents

Please indicate the ZIP code where you live and where you work.



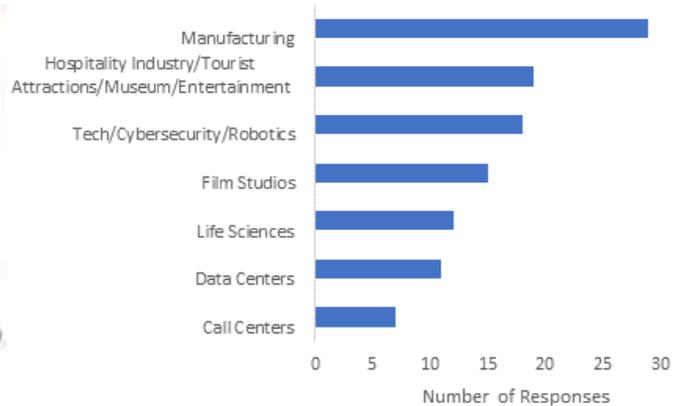
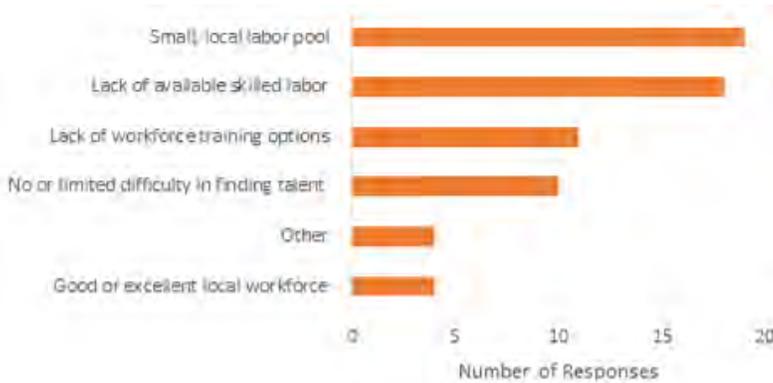
How long have you lived in Lockhart?



B. Impressions about the Workforce and Companies

How would you describe the current labor situation in the area in terms of BOTH quality AND availability? (Select up to three responses.)

What types of companies do you think would be a good fit for the area? (Select all that apply.)



Chapter 3: Assets & Challenges Assessment

Lockhart offers a unique mix of assets for businesses that are contemplating relocation, expansion, or a startup. Our approach in conducting the A&C is to employ the same criteria and methodology we use when we conduct a community evaluation for our corporate clients when exploring locations for investment. By understanding the City’s assets and challenges from a location strategy perspective, we believe that it will be better positioned to compete more effectively and to resolve area challenges that are likely inhibitors to investment projects. By recognizing and understanding strengths and opportunities, the City and its EDC will ultimately be able to determine the proper target audience of companies to which it should effectively communicate the area’s assets.

Garner Economics analyzed 47 community factors as part of the assessment. Ratings were identified by evaluating the City’s position for each of the factors against the state of Texas, the Austin Metro, and the United States. Of the 47 variables analyzed, 16 are considered a Challenge, 14 are listed as Neutral, and 17 noted as Assets.

We define a Neutral rating as normal in the realm of economic development opportunity and competitiveness. An Asset rating indicates a positive feature of the City that would be evaluated and rated as a competitive strength versus the benchmark locations.

REPORT DASHBOARD

-  Indicates the City is better (more positive) compared to the benchmarked geographies or points to a positive trend or asset within the area.
-  Indicates Lockhart is neutral or normal, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmarked geographies.
-  Indicates the City performs worse compared to the benchmarked geographies or points to a negative trend or challenge within the area.

Access to Markets

Lockhart is within a 400-mile radius of nearly 33 million people of the U.S. population. It is well positioned to distribute products on a regional, national, and international scale, with Foreign Trade Zone (FTZ) #183 serving the region. Interstate 35 is approximately 16 miles from Lockhart, and I-10, 17 miles. U.S. 183 serves Lockhart and runs north/south. Rail is provided by Union Pacific. Austin-Bergstrom International Airport is approximately 26 miles from Lockhart, and the Lockhart Municipal Airport is capable of handling some corporate aircraft. Of the eight variables measured, four are considered an Asset and four are Neutral.

Attribute	Rank
Centrally located for major regional market	 1
Centrally located for national market	
Well positioned to serve international markets	 2
Interstate highways accessibility	 3
Rail service	 4
Within one hour of commercial air passenger service	 5
General aviation airport capable of handling corporate aircraft	 6
Broadband availability and speeds	 7

Labor

Of the seven variables rated within the Labor category, three are considered an Asset, three are a Challenge and one is rated Neutral. There are over 1,100 people employed in Lockhart classified as managerial personnel and with a Location Quotient (LQ) of 1.67, which is above average. The cost of labor in Caldwell County is below all of the benchmarks. Lockhart is within 30 miles +/- of five four-year colleges. Challenges include a lack of a postsecondary vocational training and a low LQ for both people engaged in computer and mathematical occupations, and skilled admin workers.

Attribute	Rank
Availability of skilled industrial workers (<i>Manufacturing</i>)	 8
Availability of office and admin support workers (<i>Clerical</i>)	 9
Availability of computer and mathematical specialists	 10
Availability of managerial personnel	 11
Cost of labor (Caldwell County)	 12
Availability of postsecondary vocational training	 13
Within ½ hour of major university/college	 14

Lockhart’s Economic Development Initiatives

Lockhart is a Texas Type B community, and as such, has a dedicated sales tax for economic development purposes. The most current budget for the EDC shows revenue of approximately \$1 million. Recently, the EDC was able to hire an additional full-time economic specialist bringing the staff size to two FTEs. This TIS is the first economic development business plan undertaken by the City. The Lockhart business climate survey showed a serious disconnect between the City’s permitting process and the balance needed to grow business investment.

Attribute	Rank
Adequate level of professional staff	 15
Involvement of both public and private sectors in economic development activities	 16
Local economic development organization has a strategic plan	 17
Level of cooperation between various organizations involved in economic development activity	 18
Level of funding for local economic development program	 19

Access to Space

The availability of fully served industrial, office, and commercial sites is Lockhart’s Achilles’ heel. There are five sites in the EDC inventory of available properties ranging from a few acres to 1,800 acres. Some are not under municipal control or have full utility infrastructure in place. There are no office parks or office sites to speak of, and there is no inventory of available, quality industrial buildings.

Attribute	Rank
Availability of fully served and attractive flex sites	 20
Availability of fully served and attractive office sites	 21
Availability of suitable flex space (buildings)	 22
Availability of suitable office space (Class A and B space)	 23

Access to Capital

The availability of capital for business is a strength in Lockhart. Of the four variables analyzed, all four are rated as an Asset. These include the availability of tax-exempt financing for new industrial facilities, low-interest loans for small businesses, funding for business startups, and early-stage funding and a discretionary revolving loan fund to complete all of these initiatives.

Attribute	Rank
Availability of tax-exempt financing for new industrial facilities	 21
Availability of low-interest loans for small business	 22
Availability of funding for business startups or early-stage funding	 23
Any other type of financing available through the City for business activity growth and retention	 24

Government Impact on Business

The availability of water and wastewater capacity is a strength for Lockhart. The availability and type of business incentives are also a strong positive for the City. Caldwell County has the lowest median residential property tax than any other county in the Austin Metro, according to taxrates.org. Challenges include the condition and maintenance of local streets, according to the business climate survey of local residents; weak SAT/ACT test scores compared to the benchmarks; and poor feedback from businesses related to the City’s business permit procedures and related costs.

Attribute	Rank
Availability/capacity of water and wastewater treatment	 25
Availability of adequate water and sewer lines to commercial sites	
Condition and maintenance of local streets	 26
Availability and type of local incentives	 27
Secondary schools performance (SAT/ACT test scores)	 28
Business permitting procedures and costs	 29
Median property taxes by county (Caldwell)	 30

Quality of Place

Quality of place (QOP) is a key component in a community’s ability to attract and retain talent and investment. QOP is what makes a community unique. Twelve variables were analyzed to rate Lockhart’s QOP. Of the 12, only two were rated as an Asset: a low cost of living compared to the benchmarks and the community’s level of crime, also compared to the benchmarks and also low. Challenge ratings include the availability of executive-level housing, the availability of quality apartments, the availability of medical facilities and the availability of first-class lodging options. Neutral rankings include the availability of moderate-cost housing, cultural activity, recreational opportunities, variety of local restaurants and the general appearance of the community and central business district.

Attribute	Rank
Availability of executive-level housing	 31
Availability of moderate-cost housing	 32
Availability of apartments	 33
Cost-of-living index	 34
Level of crime	 35
Level of cultural activity	 36
Availability of recreational opportunities	 37
General appearance of the community	
Availability of adequate medical facilities	 38
Availability of first-class hotels, motels, and resorts	 39
Variety of local restaurants	 40
Appearance of the Central Business District(s)	

Chapter 4: Demographics & Community Trends

The following analysis examines the economic position and competitiveness of Lockhart, Texas, located south of Austin. Lockhart is within Caldwell County and a part of the Austin-Round Rock Metropolitan Statistical Area (Austin Metro). For context, this report uses the following geographies to benchmark statistics:

- ★ City of Lockhart
- ★ Caldwell County
- ★ Austin Metro
- ★ Texas
- ★ United States

This analysis relies heavily on raw, objective data collected by governmental or impartial third-party agencies. In all cases, the original and most currently available data for all geographies (as of March 2020) is used. Recent significant economic shifts due to the COVID-19 pandemic are not reflected in any figures obtained and are largely unavailable as yet, particularly on the local level. Garner Economics conducted all unique calculations and computations from the original data. For several data points, city-level data was not available and either Caldwell County or Austin Metro statistics were used for those indicators.

 Metrics analyzed for the discovery process were rated showing positive, neutral, or negative indicators. These graphic markers relay the analysis of the measure compared to the benchmarks note above, change over time, or both. Neutral grades generally resulted when there were both negative and positive aspects of these factors or comparing Lockhart to the benchmarks.

Measurements Included

- Population Trends
- Age
- Diversity
- Migration/Geographic Mobility
- Educational Attainment
- Secondary School Graduation Rate
- ACT & SAT Scores
- Household Income
- Poverty
- Crime Rate
- Cost of Living
- Broadband Access & Speed
- Air Service



Population Trends

Table 4.1 Population, 2008–2018

Geography	2018	2008–2018 Change	2008–2018 % Change
Lockhart	13,924	1,164	9%
Caldwell County	43,247	5,576	15%
Austin Metro	2,168,316	530,380	32%
Texas	28,701,845	4,392,806	18%
United States	327,167,434	23,073,468	8%

Figure 4.1 Population Growth, 2008–2018

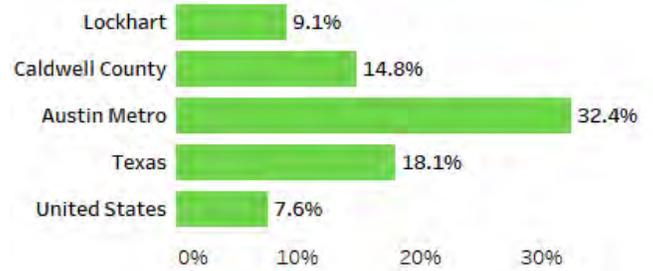
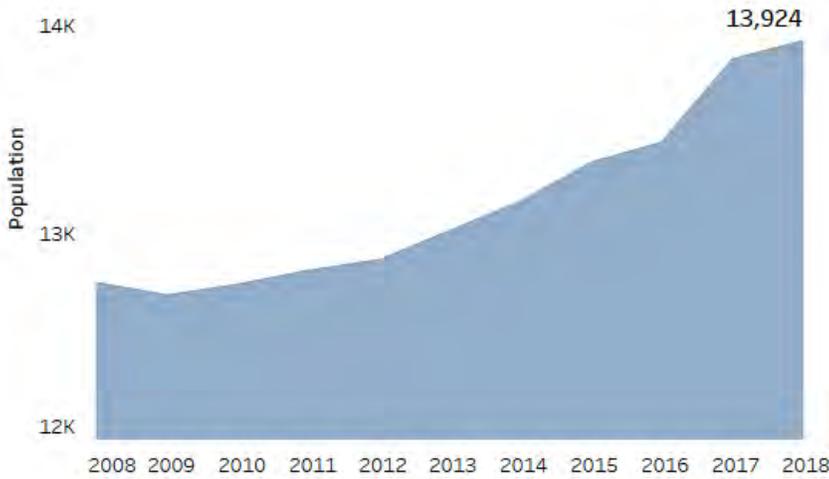


Figure 4.2 Lockhart Population Growth, 2008–2018

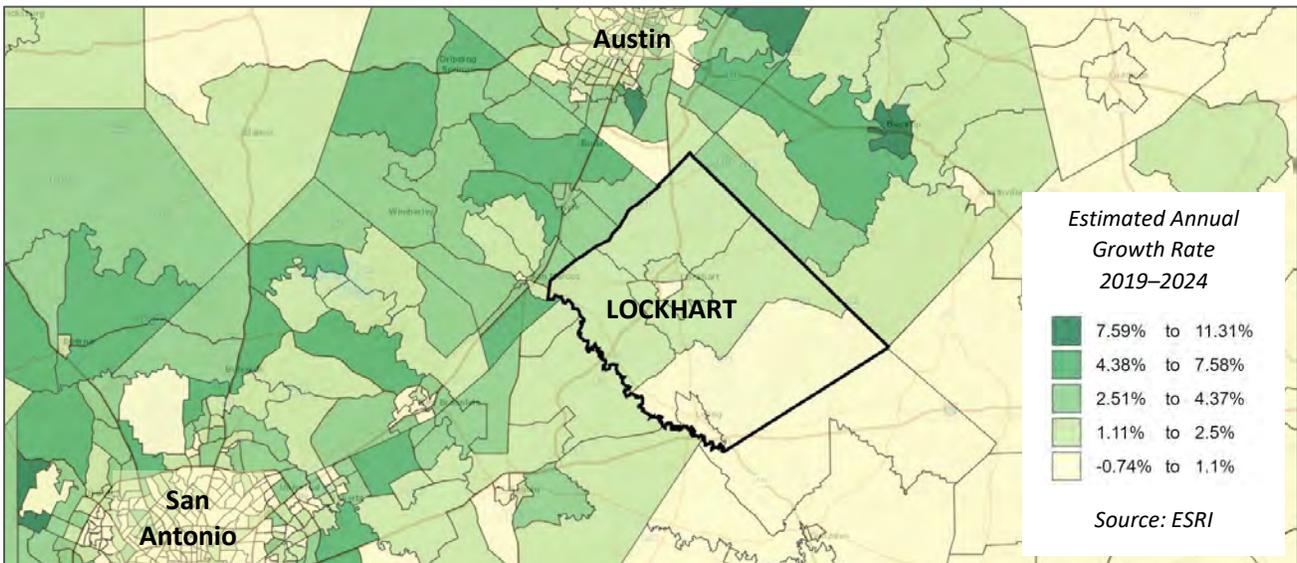


Source: U.S. Census Bureau Population Estimates, Garner Economics

The population growth of an area is a key element in the analysis of a community and can be a significant factor in local economic health. In today’s labor force climate, this is often a major consideration in business expansion and site-selection decisions.

The City of Lockhart is growing at a steady rate, increasing 9% over 10 years. This is slightly ahead of the nation’s growth but behind that of Caldwell County as a whole, Austin Metro, and Texas. The growth of the Austin and San Antonio metro areas is spreading toward Lockhart but at a slower pace than its neighboring counties.

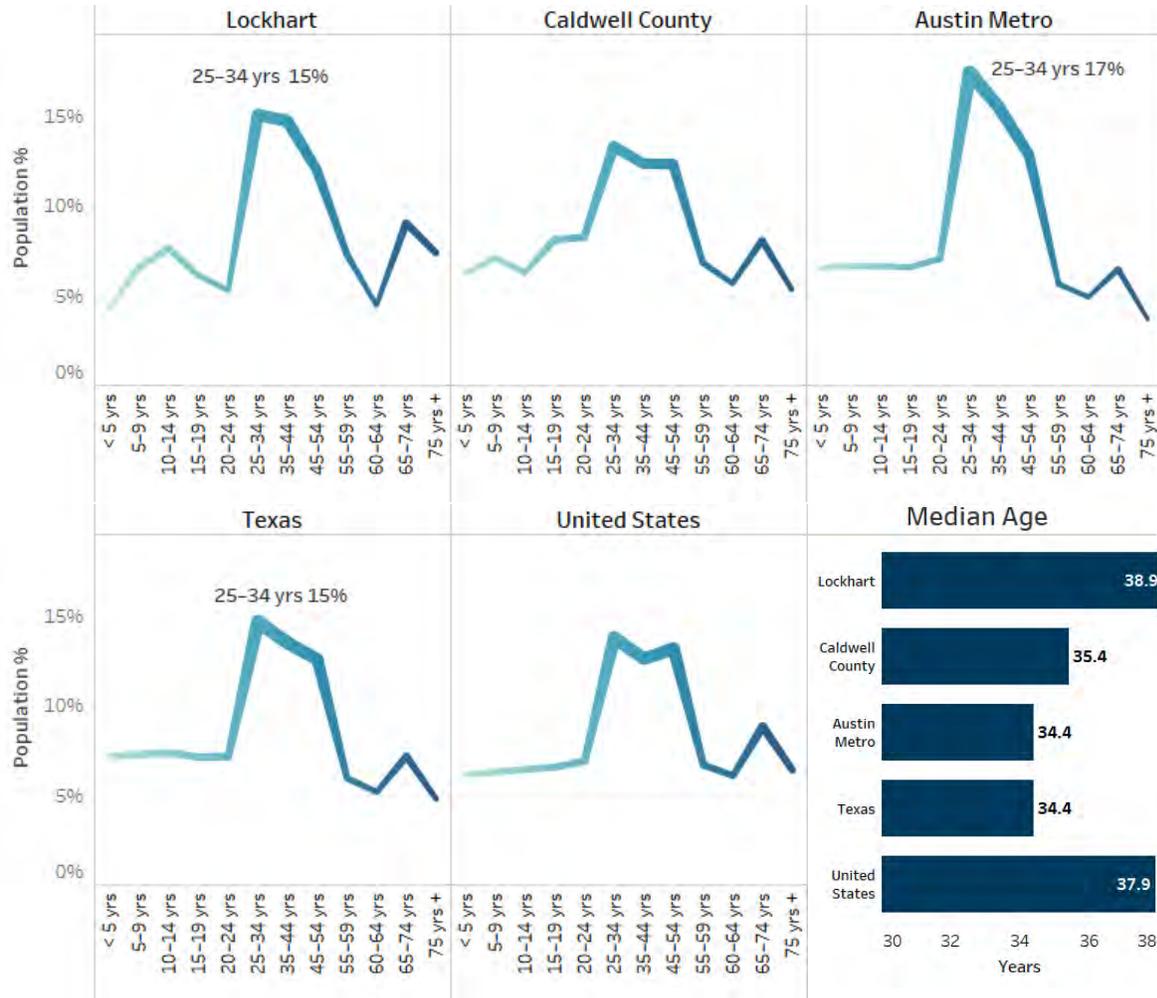
Figure 4.3 Estimated Annual Growth Rate for Austin and San Antonio Regions, 2019–2024





Age Distribution

Figure 4.4 Age Distribution & Median Age, 2018



Source: U.S. Census Bureau, Garner Economics

The age composition of a local population is an important determinant in labor force evaluation and, therefore, a factor in business decisions and competitiveness. The lack or underrepresentation of younger workers may deter firms from considering some communities for their long-term plans. Low proportions of middle-aged workers may prevent firms from initiating expansions requiring quick startup operations. Nationally, and indeed globally, the median age is getting older, and Lockhart shows the highest median age among all benchmarks.

With the current focus on retaining and attracting talent, an existing pool of younger people for both current and future workforce participation is essential in making a community attractive for companies and people alike. Lockhart's largest age group is those aged 25–34 years (15%), with those aged 35–44 years close behind at 14.7%. The Austin Metro and Texas overall have high concentrations of that young age group of 25–34-year-olds.



Change in Age Distribution

Figure 4.5 Change in Age Groups as a Percentage of Total Population, 2013–2018



Source: U.S. Census Bureau, Garner Economics



Diversity

By itself, racial diversity is not a determining factor in local economic competitiveness, although some firms may prefer higher rates of diversity to attract and retain workers. This is particularly true for multinational firms looking to attract workers from outside the United States. As talent attraction and retention are key factors in economic development today, there is a rising awareness by some companies with strong corporate cultures regarding diversity to seek areas that reflect or support inclusiveness among many groups of people.

Lockhart has the highest amount of those who identify as *Hispanic or Latino*, with 52% of the population in 2018 for all benchmarks.¹ This category is presented as a separate category from racial makeup. All Texas geographies have a high rate of individuals who are of *Hispanic or Latino Origin* (of any race).

Table 4.2 Race and Ethnic Origin Population, 2018
Highest Rate in Each Group Shaded

Geography	White	Black or African American	Asian	American Indian/ Alaska Native	Some Other Race	Two or More Races	Hispanic or Latino ¹
Lockhart	78%	8%	3%	1%	9%	1%	52%
Caldwell County	80%	6%	1%	1%	11%	2%	51%
Austin Metro	77%	7%	6%	< 1%	6%	3%	32%
Texas	74%	12%	5%	< 1%	6%	3%	39%
United States	73%	13%	5%	1%	5%	3%	18%

Source: U.S. Census Bureau, Garner Economics

¹ Hispanic or Latino category is presented as a separate category from racial makeup; therefore, the sum of racial categories will total more than 100%.

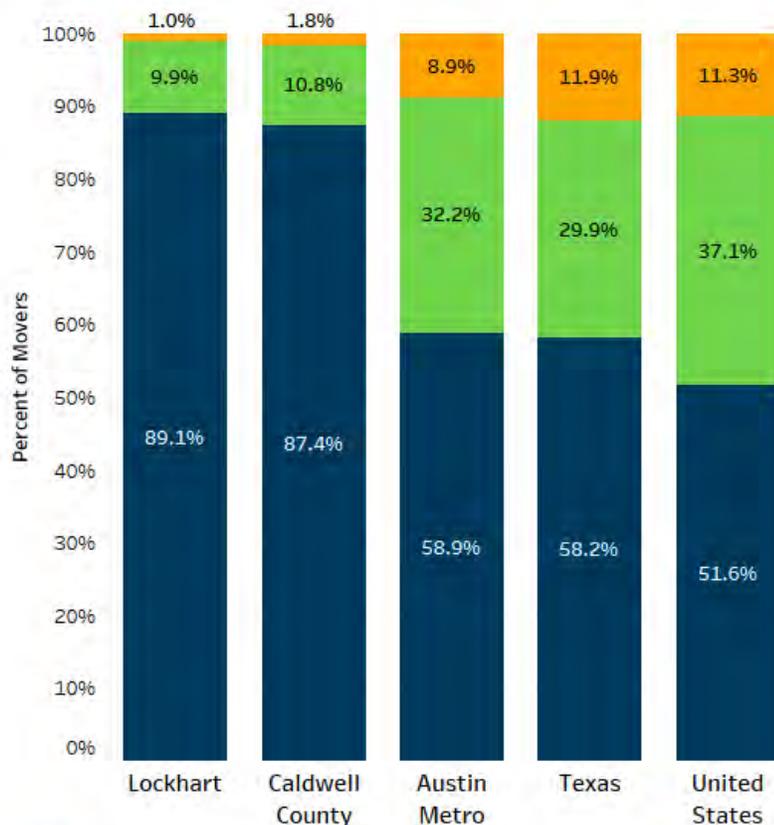


Migration/Geographic Mobility

Table 4.3 Current Residents Who Moved from Outside County, State or Abroad, 2018

Category	Lockhart	Caldwell County	Austin Metro	Texas	United States
Total Residents Who Moved into Current County in Past Year	1,357	4,528	182,993	1,842,888	19,787,739
Movers as % of Total Population	10%	11%	9%	7%	6%

Figure 4.6 Current Residents Who Moved from Outside County, State or Abroad, 2018



Attracting new residents from a diversity of outside locations can reflect a city’s broader appeal and provide an indicator of economic dynamism. This measure reflects the population that has moved within the past year, which can be an indicator of new residents **and does not show net migration, only incoming residents.**

Lockhart has a close relationship with the Austin-Round Rock Metro and other Texas counties when it comes to migration. The community gains most of its migrating residents from Texas (89%) with only 10% moving from a *Different State*. Lockhart gains only 1% of its incoming migration from *Abroad*, which could include U.S. citizens returning from service or extended work assignments.

Lockhart gained approximately 1,357 people who moved into the City in the last year from outside of Caldwell County. This number of new residents makes up about 10% of the total population.

1,357
Moved into Lockhart in Past Year
from Outside Caldwell County

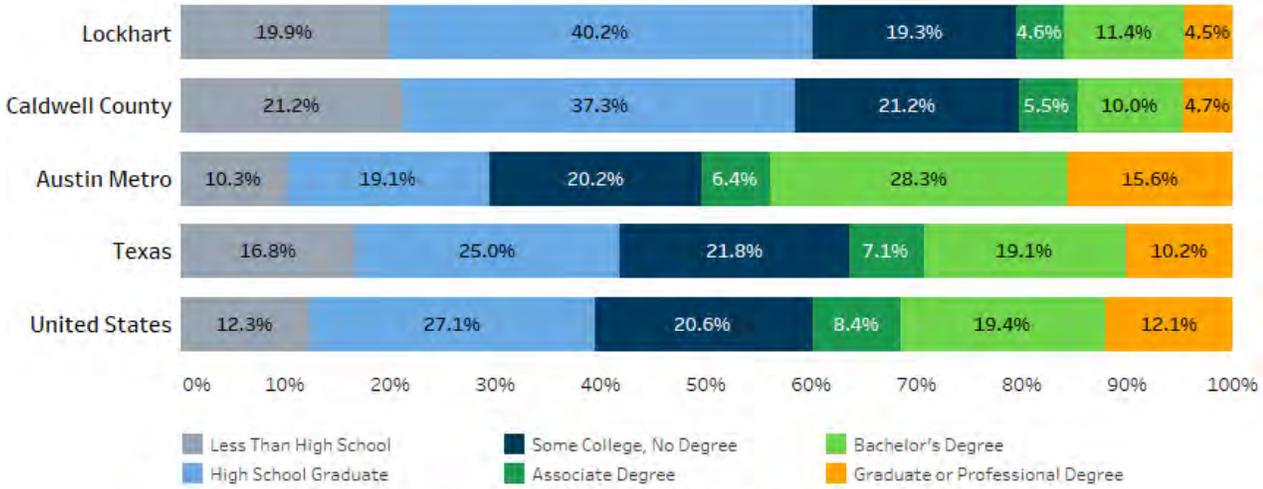
10%
Movers as % of Total Population

Source: U.S. Census Bureau, Garner Economics



Educational Attainment

Figure 4.7 Educational Attainment, 2018



% of Population Age 25 yrs+
Source: U.S. Census Bureau, Garner Economics

The level of education of the community’s population is a good indicator of labor force quality and is a decisive factor in economic competitiveness. Firms understand the need to operate in areas with a sufficient supply of workers that meet or exceed their demands. They also know that the lack of an educated workforce can significantly affect business performance.

Lockhart’s population aged 25 years or older is 80% high school-educated with about half of that group not obtaining any further education. Lockhart has the lowest percentage of population in all educational categories above high school compared to benchmarks.



Educational Attainment Trend

Figure 4.8 Change in Educational Attainment as a Percentage of Total Population, 2013–2018



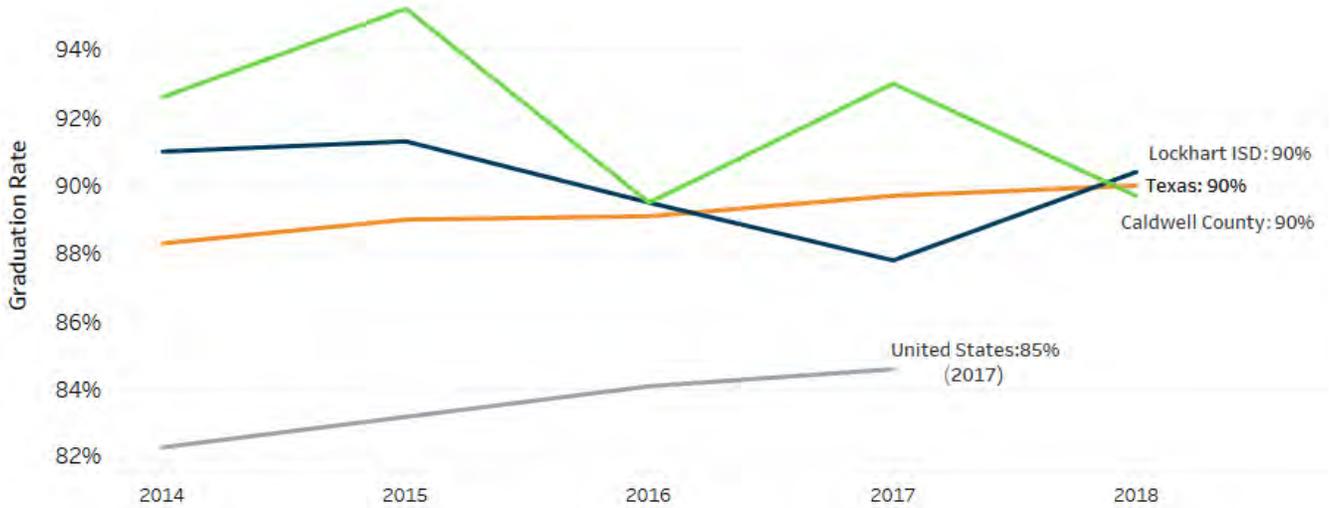
Percent of Total Population (Change 2013–2018)
Source: U.S. Census Bureau, Garner Economics

The change in educational attainment among Lockhart’s population 25 years or older between 2013 and 2018 showed only two categories that improved 1.7%: *High School Graduate* and *Bachelor’s Degree*. The percentage with an *Associate Degree* remained the same, and there was a slight decrease in the percentage of population who hold a *Graduate or Professional Degree*.



Secondary School Performance: Graduation Rates

Figure 4.9 Graduation Rate (4-Year Cohort), 2014–2018



Source: Texas Education Agency, Garner Economics

The share of high school students that graduate within four years of beginning ninth grade is an important measure of the performance of local public school districts. Lockhart Independent School District (ISD) has a graduation rate above that of Texas and Caldwell County as a whole for 2018. Lockhart ISD has consistently performed better than the national average graduation rate which is not yet available for 2018.



Secondary School Performance: ACT & SAT Scores

Figure 4.10 Composite ACT Scores, 2017

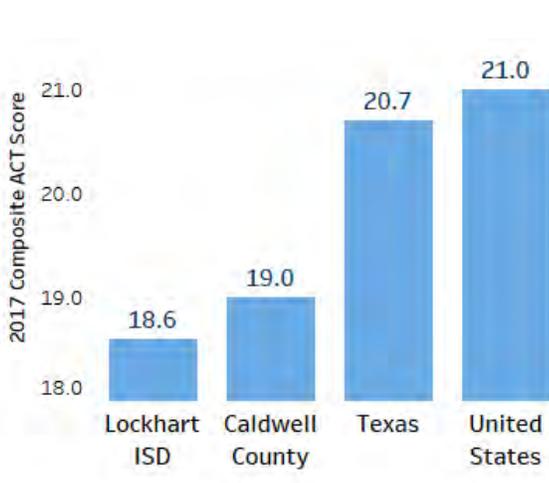
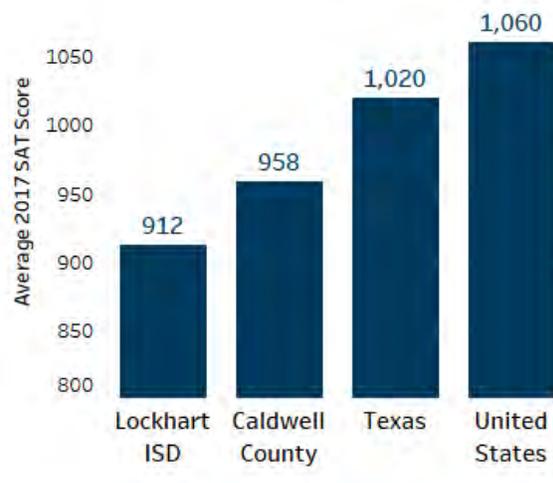


Figure 4.11 Average SAT Scores, 2017



Source: Texas Education Agency, Garner Economics



Secondary School Performance: ACT & SAT Scores (continued)

Figure 4.12 Composite ACT Scores, 2013–2017

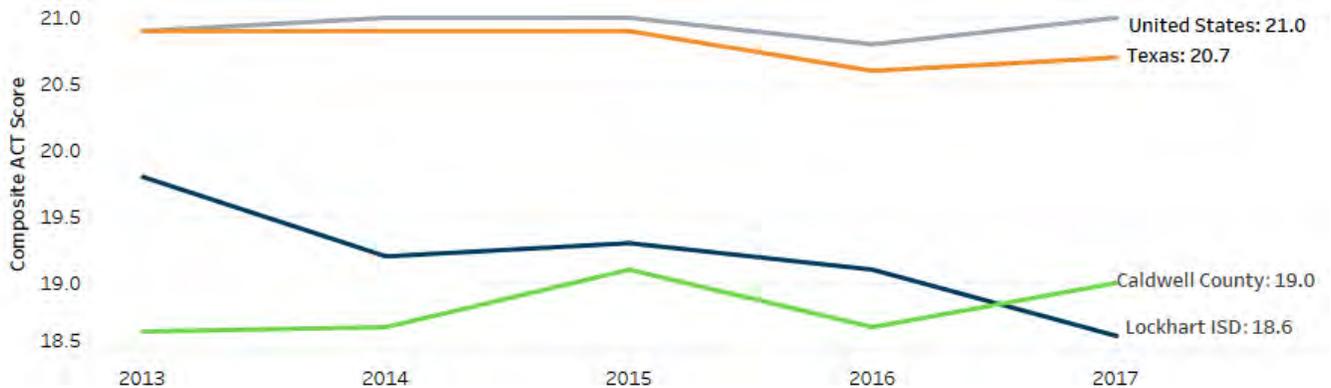
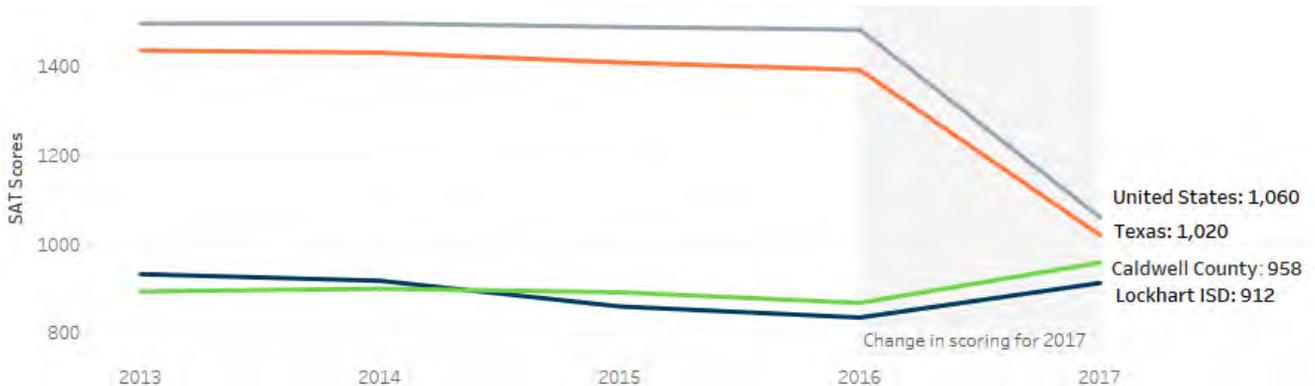


Figure 4.13 Average SAT Scores, 2013–2017



Source: Texas Education Agency, Garner Economics

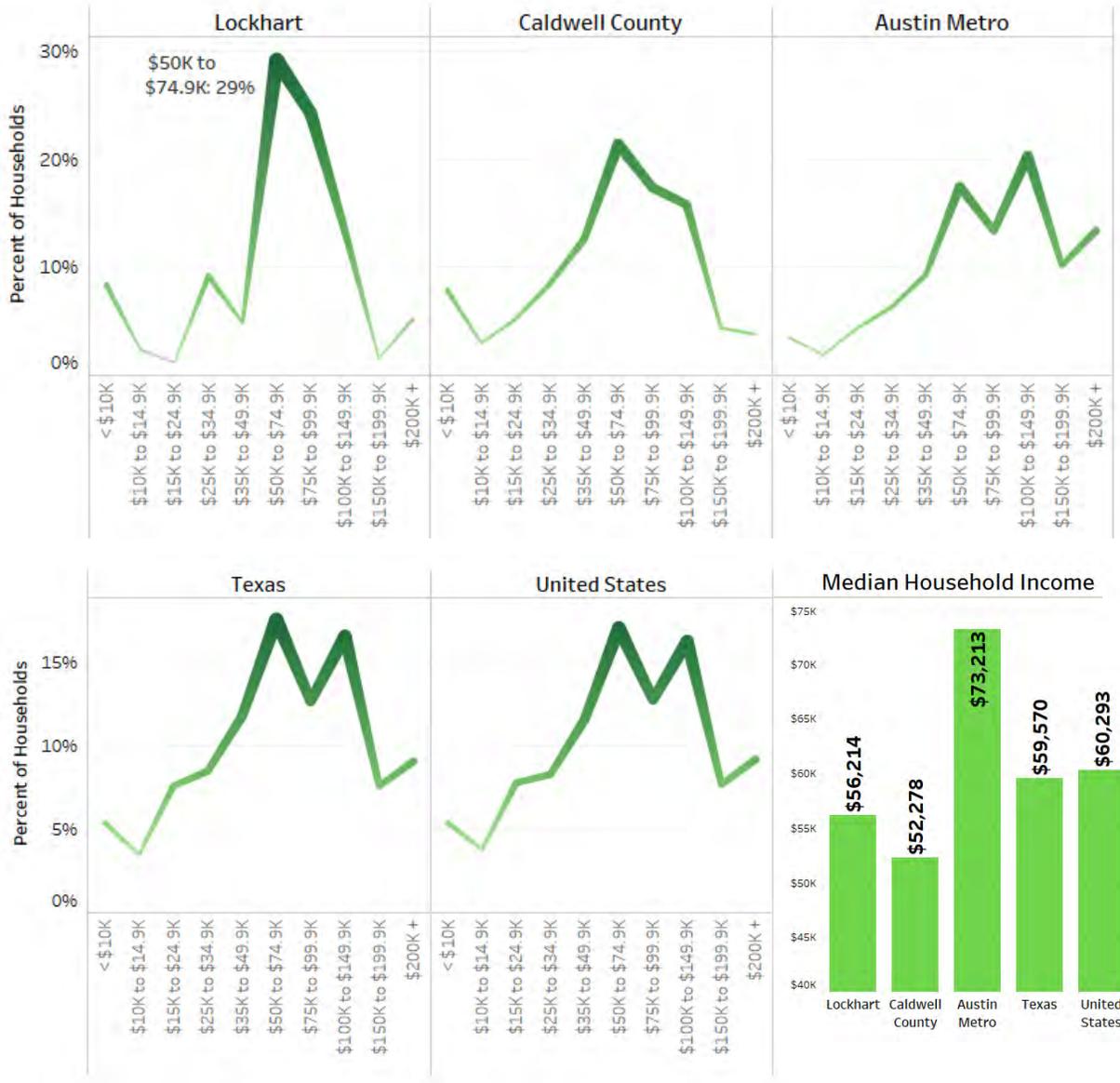
Standardized testing is another comparative tool to reflect the performance of secondary schools. The ACT and SAT exams are standardized tests for college admissions in the United States and are a widely accepted measure of education quality.

Lockhart ISD had the lowest scores compared to Caldwell County, the state, and the nation. ACT scores have only recently dipped below the County as a whole, but the trend shows composite scores dropping. Changes in the structure of the SAT and scoring in 2017 show dramatic differences in the national and state average scores and improvement in average scores at the local level. This may bode a positive change if the improvement in subsequent years illustrates change beyond the structural scoring shift.



Household Income

Figure 4.14 Household Income Distribution & Median Household Income, 2018



Source: U.S. Census Bureau, Garner Economics

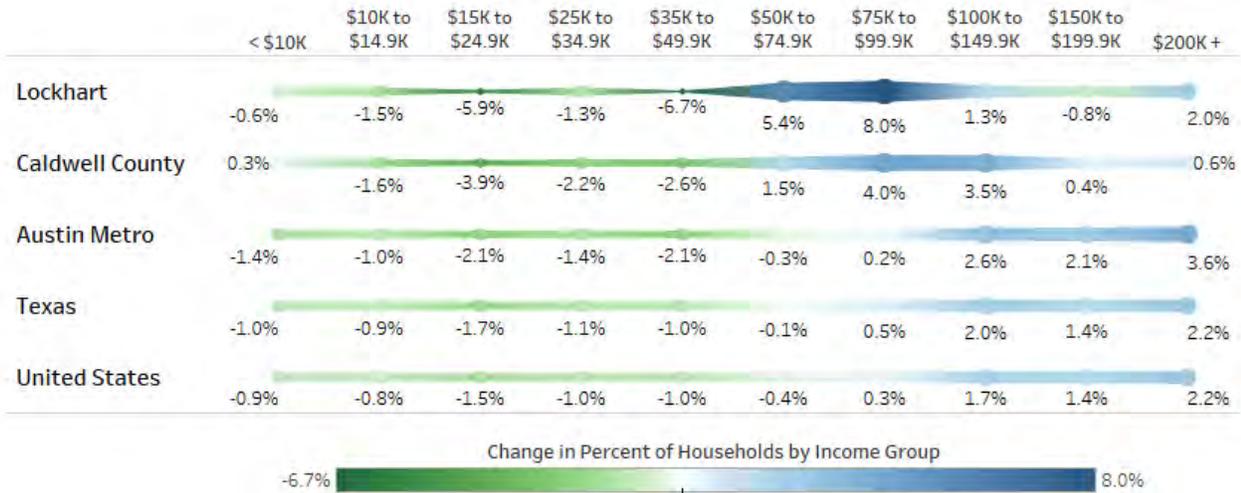
Household income reflects income for residents and is an indicator of wealth in the community. Lockhart has a concentration in middle-income levels with the highest percentage of households earning between \$50,000 to \$74,999 (29%) and the second-highest level earning \$75,000 to \$99,999 (24%). Caldwell County household incomes are more evenly distributed, but neither the City nor County has many households earning above \$150,000.

Lockhart has a median household income of \$56,214, higher than Caldwell County as a whole but behind all other benchmarks. The Austin Metro’s median household income of \$73,213 exceeds all median incomes in the comparison.



Household Income Change

Figure 4.15 Change in Household Income Distribution, 2013–2018



Source: U.S. Census Bureau, Garner Economics

Analysis of change in the household income distribution showed very little change overall, and most of the increases were at higher income levels. Lockhart had significant growth from 2013 to 2018 in households that earned \$50,000 to \$99,999, resulting in a concentration of those categories in 2018 as illustrated in Figure 4.14.



Per Capita Income

Figure 4.16 Per Capita Income

	2013	2018	Change in Per Capita Income
Lockhart	\$18,558	\$22,572	Lockhart 21.6%
Caldwell County	\$19,673	\$23,881	Caldwell County 21.4%
Austin Metro	\$31,388	\$37,759	Austin Metro 20.3%
Texas	\$26,019	\$30,143	Texas 15.8%
United States	\$28,155	\$32,621	United States 15.9%

Source: U.S. Census Bureau, Garner Economics

Per capita income in Lockhart, the average income for every person in the City, is \$22,572 for 2018, up from \$18,558 in 2013. Lockhart has the lowest per capita income among all benchmarks for both years analyzed. Lockhart did have the highest percent change between 2013 and 2018, increasing by 21.6%

 Poverty

Figure 4.17 Poverty

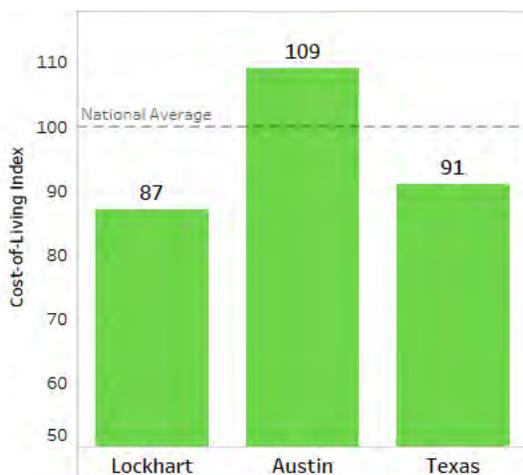
	Percent Below Poverty		Children Below Poverty Level		Change in Poverty Level	Change in Children in Poverty
	2013	2018	2013	2018		
Lockhart	15.4%	12.9%	24.1%	13.4%	-2.5%	-10.7%
Caldwell County	18.7%	17.7%	24.7%	23.1%	-1.0%	-1.6%
Austin Metro	14.8%	11.6%	19.0%	14.5%	-3.2%	-4.5%
Texas	17.6%	15.5%	25.3%	22.0%	-2.1%	-3.3%
United States	15.4%	14.1%	21.6%	19.5%	-1.3%	-2.1%

Source: U.S. Census Bureau, Garner Economics

The measurement of poverty in a community helps to evaluate the well-being of the citizens and the state of the economy. Lockhart’s poverty rate in 2018 (12.9%) is below all other benchmarks except the Austin Metro. The poverty rate for children under 18 is only slightly higher than the total poverty rate at 13.4% in 2018. This level for children is the lowest of all benchmarks. The City of Lockhart decreased the level of poverty for children under 18 an impressive 10.7% in five years when comparing 2013 to 2018. This was more than double any other geography in this category.

 Cost of Living

Figure 4.18 Cost-of-Living-Index, 2019



Source: AreaVibes.com derived from C2ER Index for 2019, National Average=100, Garner Economics

Table 4.4 Cost-of-Living-Index Categories, 2019

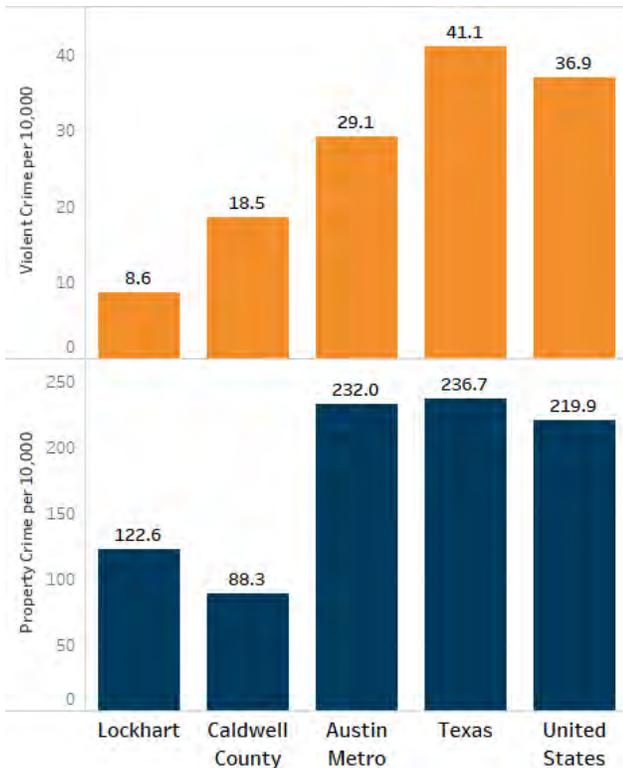
Index	Lockhart	Austin	Texas
Cost-of-Living Index	87	109	91
Goods & Services Index	89	104	95
Groceries Index	87	93	90
Healthcare Index	121	107	97
Housing Index	72	133	83
Transportation Index	100	93	94
Utilities Index	96	95	102

The cost of living in Lockhart is relatively low, with an index rate of 87 compared to the national base of 100. All categorical indices are below national and state levels except for Healthcare and Transportation, which are 121 and 100 respectively.



Crime Rates

Figure 4.19 Crime Rates per 10,000 Residents



Sources: Uniform Crime Reports, FBI; Garner Economics

Crime rates are a widely accepted, objective gauge of community livability. Crime rates may reflect underlying economic conditions and could signal deeper systemic problems more so than standard economic measures show.

The City of Lockhart has relatively low crime rates. The *Violent Crime Rate* shows only 8.6 crimes reported per 10,000 persons, a rate significantly below metro, state, and national benchmarks and the rate for Caldwell County as a whole.

The *Property Crime Rate* is 122.6 crimes reported per 10,000 persons, a level also below metro, state, and national measures. Caldwell County does have a lower rate than the City of Lockhart for property crime; however, this is common to show a lower property crime level for the less densely populated County.

For a unilateral view of crime rates, research is based on crimes reported and published in the FBI Uniform Crime Report for 2017 and is comparable to reports published by the Texas Department of Public Safety.



Air Service

Lockhart is located less than 30 minutes (26.5 miles) from the Austin-Bergstrom International Airport (AUS) which is the 33rd busiest airport in the United States based on passenger traffic. AUS is serviced by 18 airlines, 68 nonstop destinations, three fixed-base operators (FBOs), and cargo operations, making the airport a valuable tool for economic development.

AUS served more than 17.3 million passengers in 2019, a 9.6% increase over 2018. Passenger traffic has grown rapidly since 2016; however, in the early days of 2020 amid the COVID-19 pandemic, travel restrictions and aversion to the risk of large groups will certainly have an impact on passenger traffic at AUS and across the globe.

Figure 4.20 Austin-Bergstrom International Airport (AUS) Passenger Traffic



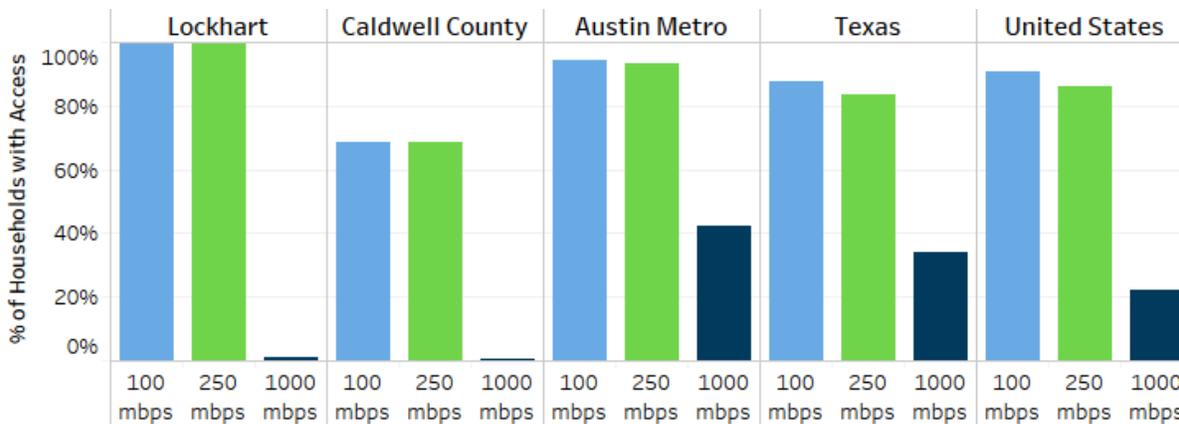
Source: Austin-Bergstrom International Airport, Garner Economics



Broadband Access & Speed

Broadband access and speed have a big impact on the local economy in terms of supporting business, entrepreneurship, and educational opportunities. As we have seen in the current environment of the COVID-19 pandemic, access to broadband is crucial for a community to succeed in business and offer opportunity for success to all its residents.

Figure 4.21 Access to Broadband Internet by Speed level, 2019

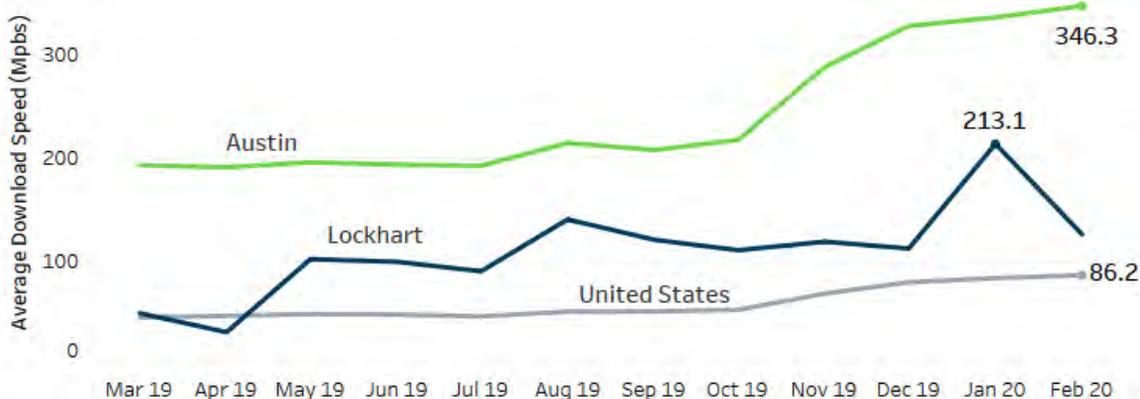


Source: FCC Broadband Map as of June 2019, Garner Economics (includes ADSL, Cable, Fiber, Fixed Wireless, Satellite, Other)

Data shows that Lockhart’s households have good access to the internet. Service with speeds of 250 megabytes per second (Mbps) are widely accessible in Lockhart but become less accessible outside the City. Access to gig service is available to under 1% of households and only one internet provider advertises connections at that level.

Speed tests performed in the Lockhart ZIP code of 78644 registered speeds up to 213.1 Mbps: however, even the top 10% of speeds stayed closer to the 100 Mbps mark. Austin’s top 10% of speeds performed much higher with significant improvement over the last two quarters. Average download speed, which includes all speed tests, are 31 Mbps for Lockhart, 126.5 for Austin, 63.3 for Texas, and 59 for the United States over the same time frame.

Figure 4.22 Top 10% of Download Speeds, 12-months ending February 2020



Source: BroadbandNOW, 2020, Garner Economics.

Analysis is based on 5,969 speed tests from IP-verified users who took speed tests from an IP address in Lockhart. National statistics are calculated across 286,088,375 over the same time range.

Chapter 5: Labor Force & Employment

This chapter focuses on the labor market of Lockhart, Texas, beginning with the residents within the City, then exploring commuting patterns with the surrounding area and the full labor force draw within a 45-minute drive-time from the center of Lockhart.

The data then transitions to employer-based information, including employment, industry composition, wage comparisons, and additional workplace statistics for those working in the Lockhart area. City- and county-level data are used for evaluating employer dynamics, as some datasets had limitations in available data for the City.

It is important to note that recent changes that are a result of the COVID-19 pandemic with its global reach are not reflected in any analyses in this report.

Measurements Included

- Labor Force & Unemployment
- Labor Force Participation
- Job Growth
- Industry Sector Composition
- Estimated Annual Wage
- Self-Employment
- Startups
- Labor Draw Analysis
- Commuting Patterns
- College Enrollment & Degrees



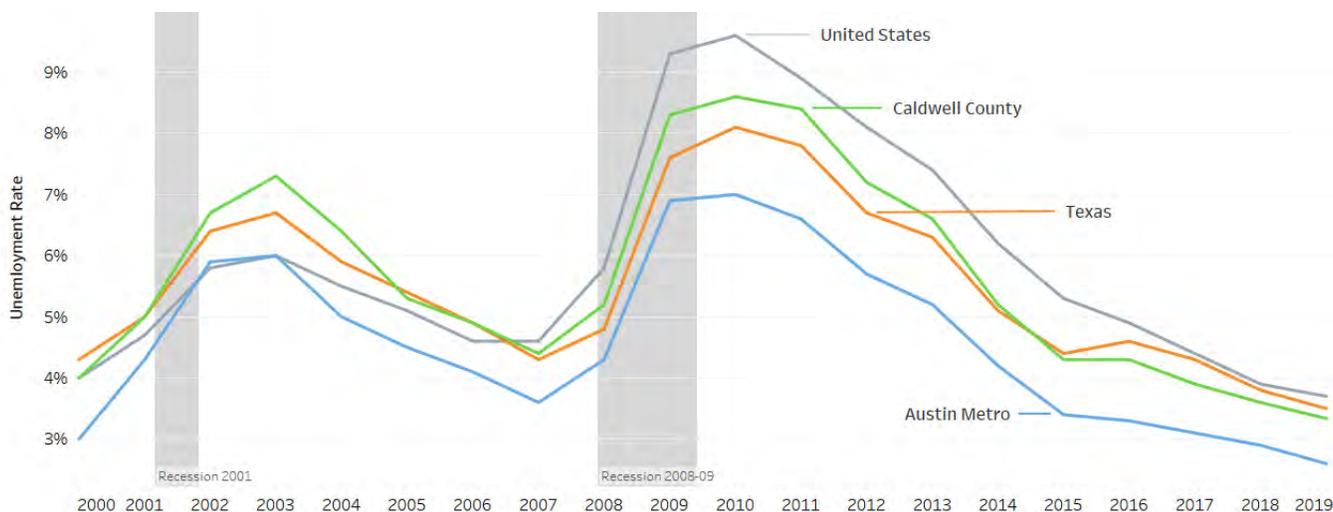
Labor Force & Unemployment

Table 5.1 Labor Force & Employment Status, 2018*

	Lockhart	Caldwell County	Austin Metro	Texas	United States
Civilian Labor Force	5,734	18,842	1,139,144	13,728,630	162,248,196
Employed	5,534	18,334	1,089,708	12,985,624	152,739,884
Unemployed	200	508	49,436	743,006	9,508,312
Unemployment Rate	3.5%	2.7%	4.3%	5.4%	5.9%

Source: U.S. Census Bureau, Garner Economics
*5-Year Average, 2014–2018

Figure 5.1 Unemployment Rate Trends, 2000–2019



Source: Bureau of Labor Statistics, Garner Economics. Lockhart data not available.



Labor Force & Unemployment (continued)

Lockhart has an average labor force of approximately 5,700 residents. The five-year average of unemployed people is 200, resulting in a low unemployment rate of 3.5%. Caldwell County’s labor force is more than three times the size of Lockhart’s workforce with an average unemployment rate of 2.7%. Caldwell County, which includes Lockhart’s labor data, has had an unemployment rate below the state and nation since 2015.

The latest available data for all four geographies included in the Bureau of Labor Statistics survey is for January 2020 showing very low unemployment rates. The current COVID-19 pandemic will produce steep changes in unemployment and the labor force which will begin to show in March 2020 data.

Table 5.2 Current Labor Force & Employment, January 2020

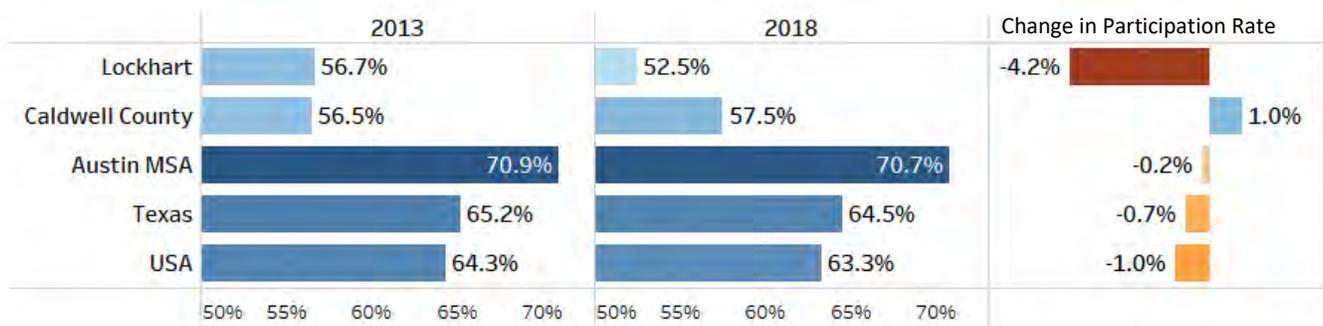
	Caldwell County	Austin Metro	Texas	United States
Civilian Labor Force	19,909	1,254,494	14,188,058	164,235,000
Employed	19,242	1,220,005	13,655,624	158,017,000
Unemployment Rate	3.4%	2.7%	3.8%	3.8%

Source: Bureau of Labor Statistics, Garner Economics. Lockhart data not available.



Labor Force Participation

Figure 5.2 Labor Force Participation, 2013–2018



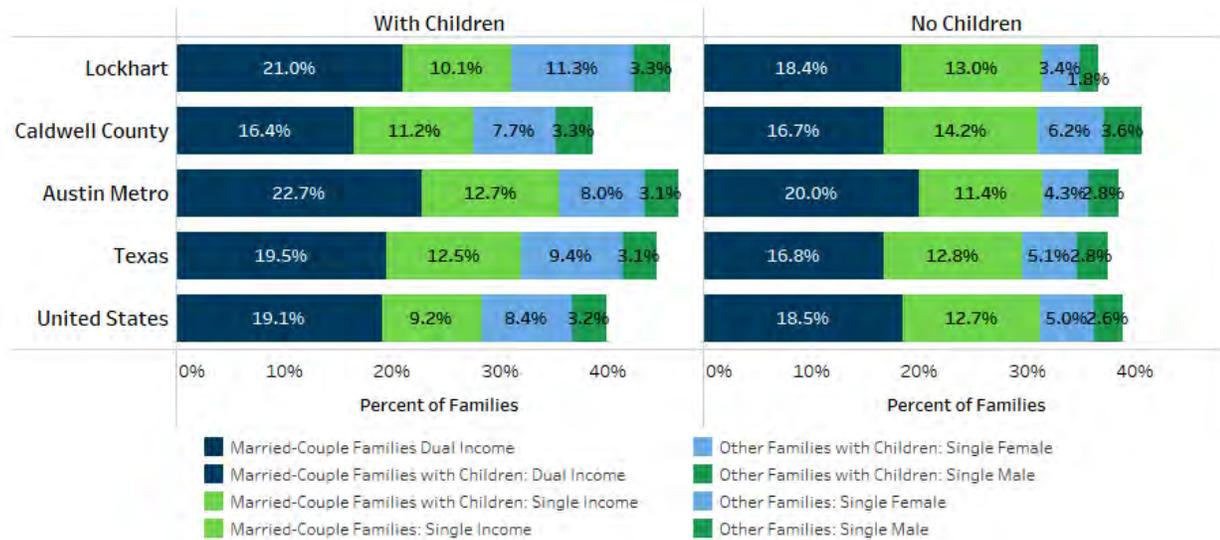
Source: U.S. Census Bureau, Garner Economics

Labor force participation rates have been dropping across the country due to an aging population and other employment factors. Lockhart’s sharp decline (-4.2%) in the labor force participation rate from 2013 to 2018 is concerning. The City’s participation rate of 52.5% for 2018 is well below all benchmarks and is a severe contrast to the Austin Metro’s strong participate rate of 70.7% just to the north. As a result of the COVID-19 pandemic, labor force participation rates may rise as people return to the workforce after investment losses.



Labor Force Participation – Families

Figure 5.3 Labor Force Participation of Families, 2018



Among Lockhart’s families, 82.3% participate in the labor force, a rate second only to the Austin Metro. The largest category of family working is the *Dual Income Families*, about 39.4% collectively — with and without children under 18 at home. Lockhart has a higher proportion of *Single Females with Children* working (11.3%) than the rest of the benchmarks and fewer *Single Families with No Children* participating in the labor force.

Table 5.3 Labor Force Participation of Families, 2018

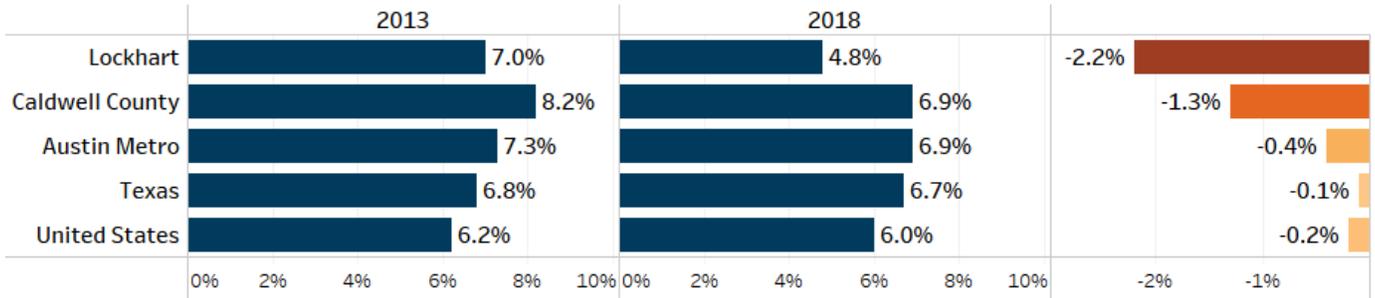
	Lockhart	Caldwell County	Austin Metro	Texas	United States
<i>Families with Children</i>					
Married-Couple Families with Children: Dual Income	21.0%	16.4%	22.7%	19.5%	19.1%
Married-Couple Families with Children: Single Income	10.1%	11.2%	12.7%	12.5%	9.2%
Other Families with Children: Single Female	11.3%	7.7%	8.0%	9.4%	8.4%
Other Families with Children: Single Male	3.3%	3.3%	3.1%	3.1%	3.2%
<i>Families with No Children</i>					
Married-Couple Families Dual Income	18.4%	16.7%	20.0%	16.8%	18.5%
Married-Couple Families: Single Income	13.0%	14.2%	11.4%	12.8%	12.7%
Other Families: Single Female	3.4%	6.2%	4.3%	5.1%	5.0%
Other Families: Single Male	1.8%	3.6%	2.8%	2.8%	2.6%
Total Families Participating in Labor Force	82.3%	79.3%	84.9%	82.0%	78.7%

Source: U.S. Census Bureau, Garner Economics



Self-Employment

Figure 5.4 Self-Employment



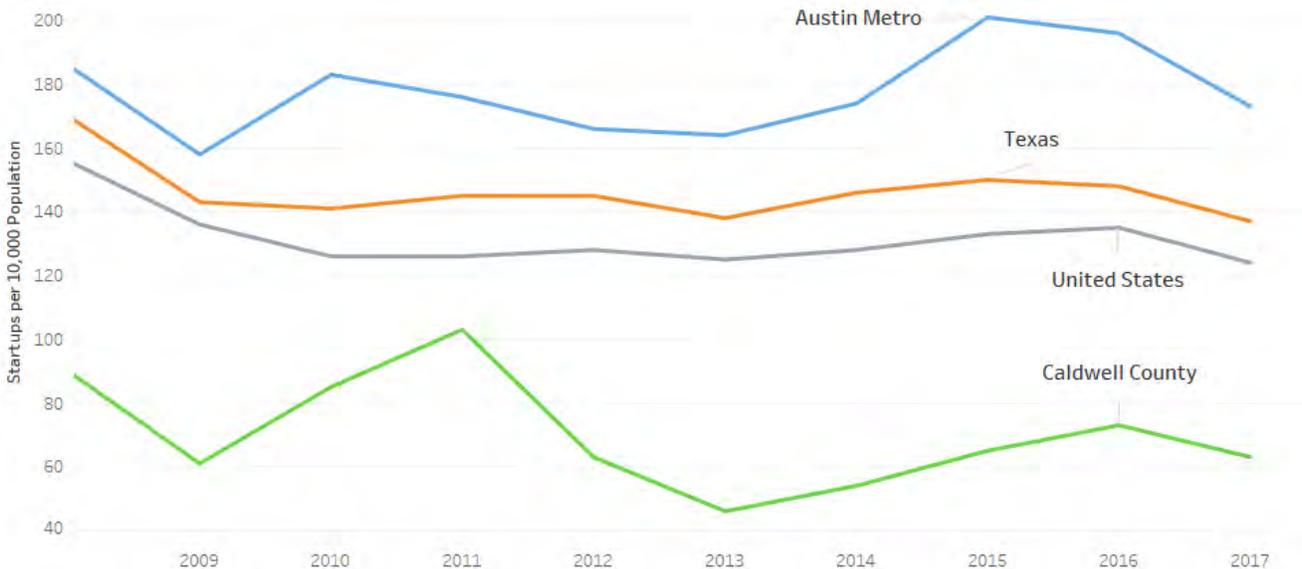
Source: U.S. Census Bureau, Garner Economics

Measuring the proportion of people who are *Self-Employed* is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism. Lockhart has a self-employment rate of 4.8% for 2018. This is below all other benchmarks and a sharp decrease from 2013 self-employment level of 7%. Lockhart had the largest change for all areas studied (-2.2%) and Caldwell County had a decline of 1.3%.



Startups

Figure 5.5 Startup Ratio per 10,000 Population



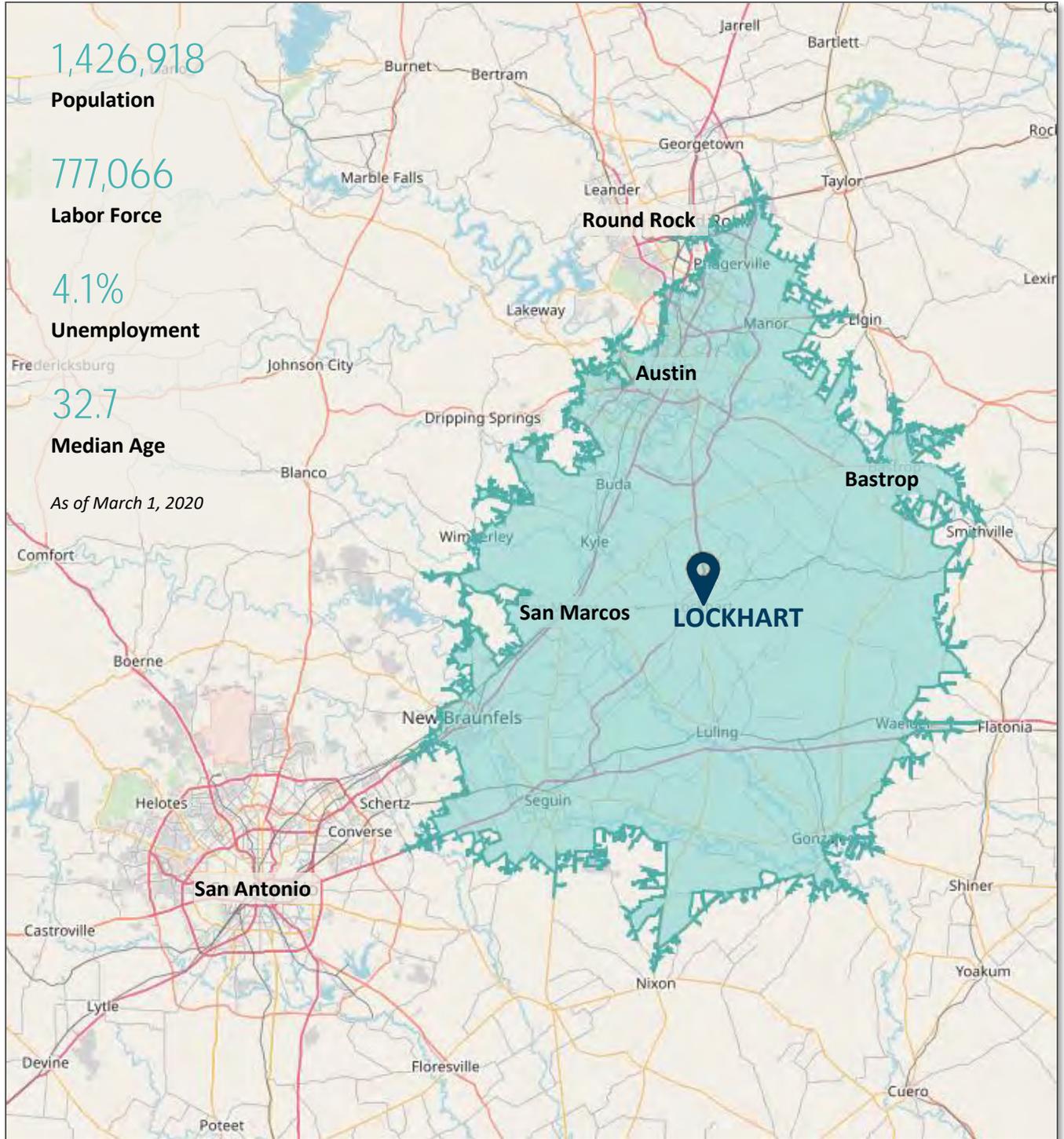
Source: U.S. Census Bureau, QWI Explorer, Garner Economics

The number of new firms that start in Caldwell County, the smallest area available, had a startup rate below all other geographies analyzed. To normalize and compare areas, a ratio was created to compare the number of new firms created against the population to arrive at the number of startups per 10,000 people. The Austin Metro, known for its entrepreneurial culture, had the highest startup rate.



Labor Force Draw

Figure 5.6 Drive-Time Analysis (45-Minute), 2019



Source: ESRI, Garner Economics, 2019



Commuting Patterns

Figure 5.7 Commuting Patterns City of Lockhart & Caldwell County, 2017

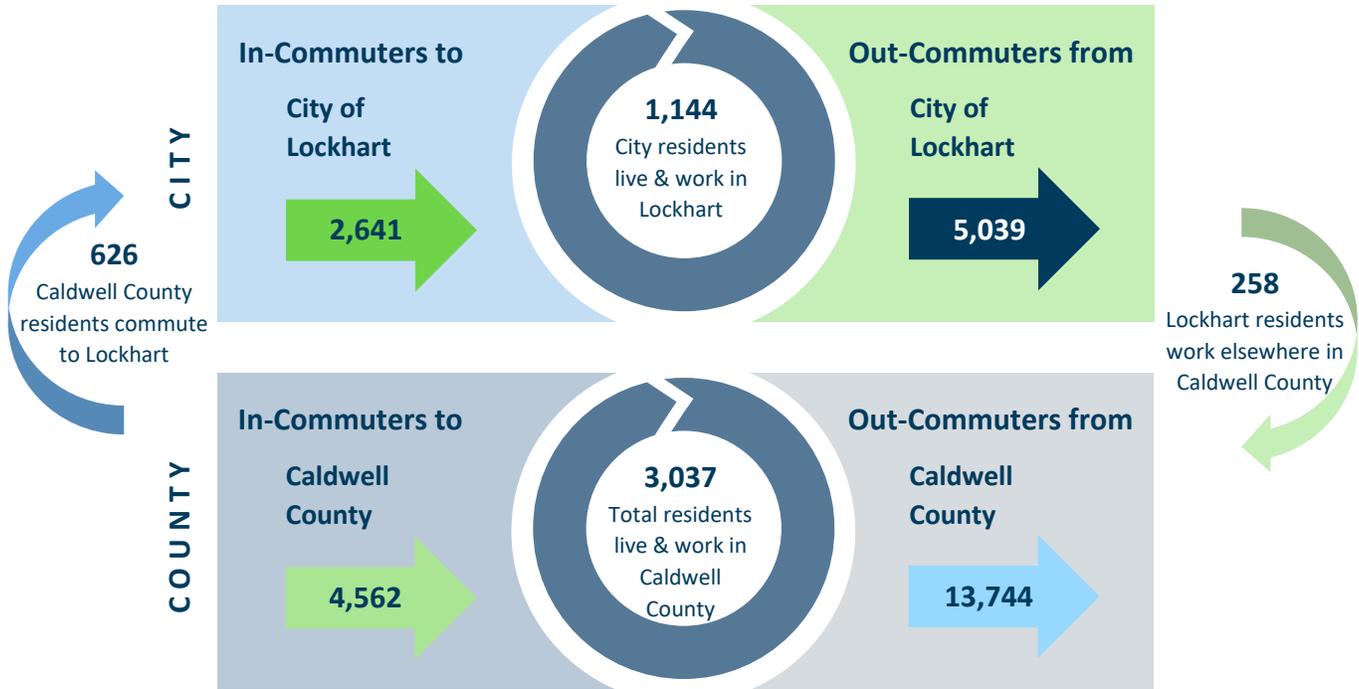


Figure 5.8 In-Commuting, Home County
Where People Live Who Work in Lockhart, 2017

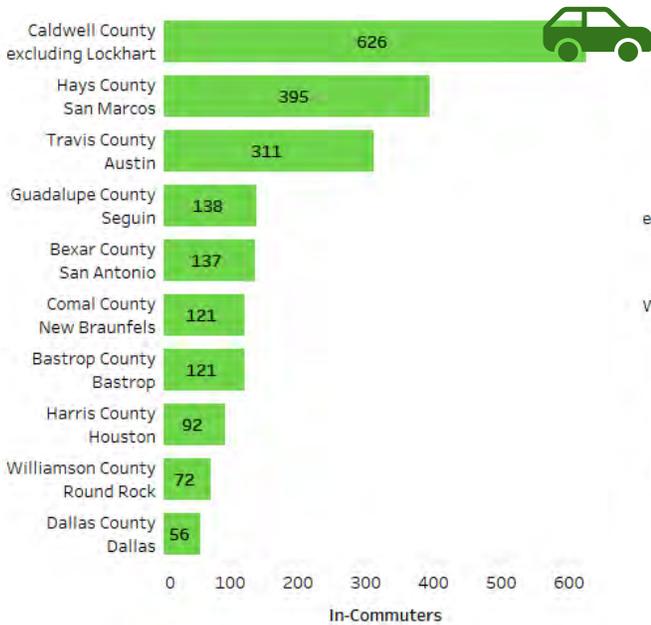
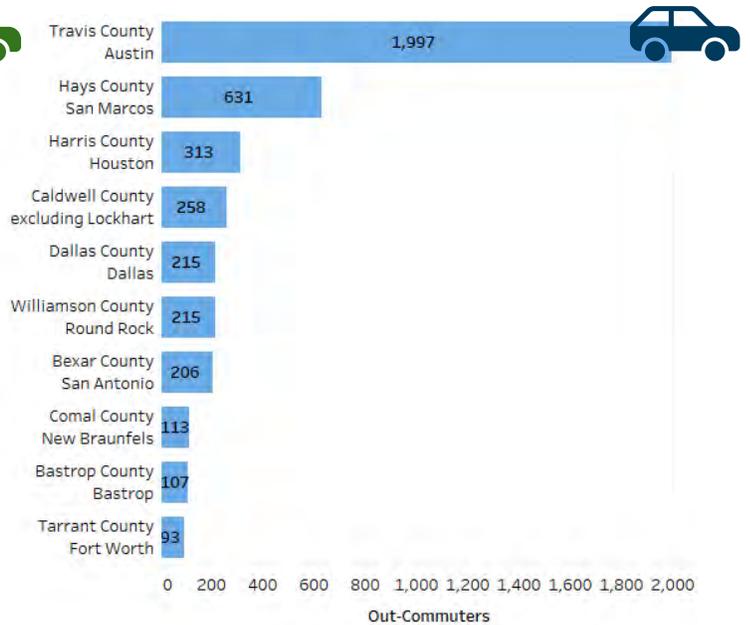


Figure 5.9 Out-Commuting, Employer County
Where People Work Who Live in Lockhart, 2017



Source: 2017 U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics
2017 data commuting data does not include federal workers.

Worker flows help define the size of a local economy’s labor draw, and trends help describe attraction and regional competition. Worker flows represent both daily commuters and short-term, away-from-home assignments. Lockhart residents that remain in the city limits for work are about 30% of the employee base in the City. More than 2,600 workers commute into Lockhart for work (Figure 5.9), including about 600 that live elsewhere in Caldwell County. A majority of Lockhart residents who work outside of the City commute to Austin and other locations in Travis County, which is an employment center for much of the region.

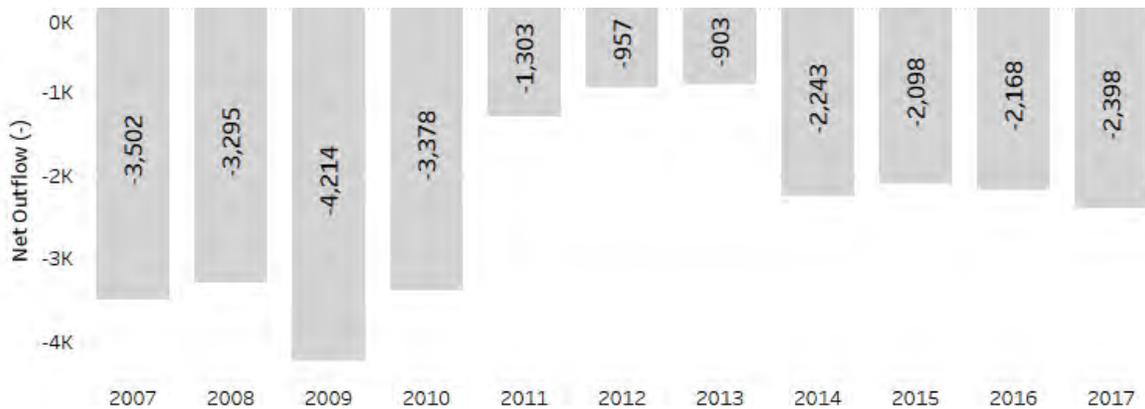
 **Commuting Trends**

The City of Lockhart exports more workers than it retains and imports, leaving a net outflow of -2,398 in 2017. The number of *In-Commuters* and those who *Live and Work in Lockhart* have increased steadily since 2007. The volume of *Out-Commuters* has been variable since 2007 with a general increase beginning in 2013. To support the increase in all categories of workers, there would need to be more residents and more jobs. There are more residents in the City, as we saw earlier in the report, and more jobs which will be explored later in this chapter.

Figure 5.10 City of Lockhart Commuting Trends, 2007-2017



Figure 5.11 City of Lockhart Net Commuter Outflow Trend, 2007-2017



Source: 2017 U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics
2017 data commuting data does not include federal workers.



Job Growth

Figure 5.12 Job Growth, 2007–2018

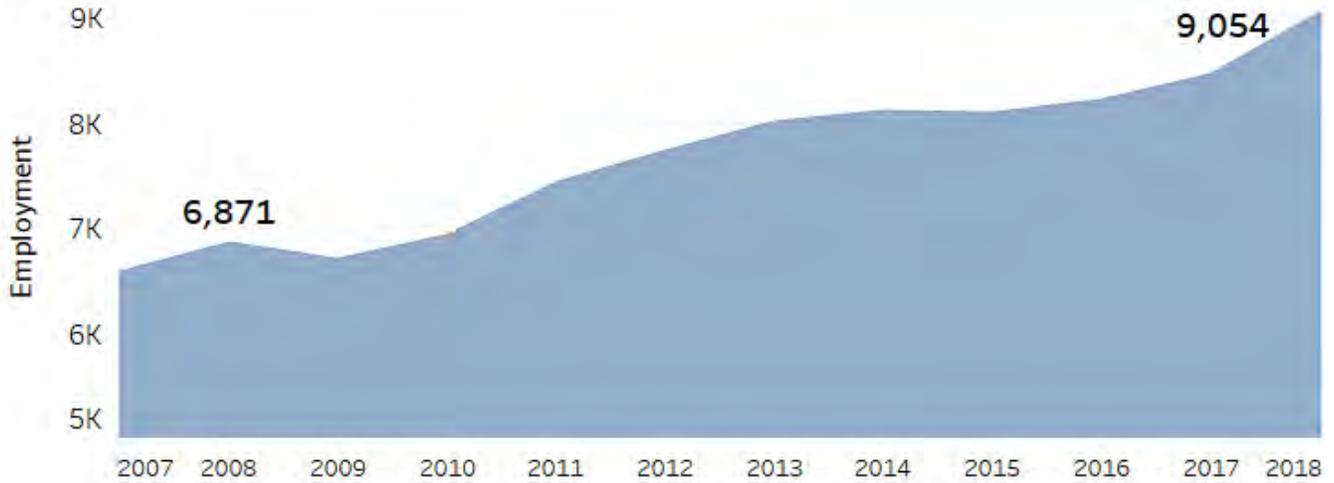


Table 5.4 Job Growth

	2008	2013	2018	5-Year Change (2013–2018)		10-Year Change (2008–2018)	
				#	%	#	%
Caldwell County	6,871	8,017	9,054	1,037	13%	2,183	32%
Austin Metro	768,189	845,787	1,020,783	174,996	21%	252,594	33%
Texas	10,452,907	11,031,907	12,302,358	1,270,451	12%	1,849,451	18%
United States	134,805,659	133,968,434	146,131,754	12,163,320	9%	11,326,095	8%

Source: Bureau of Labor Statistics, Garner Economics.
Comparable data for Lockhart was not available.



Estimated Annual Wages

Table 5.5 Average Annual Wage Growth

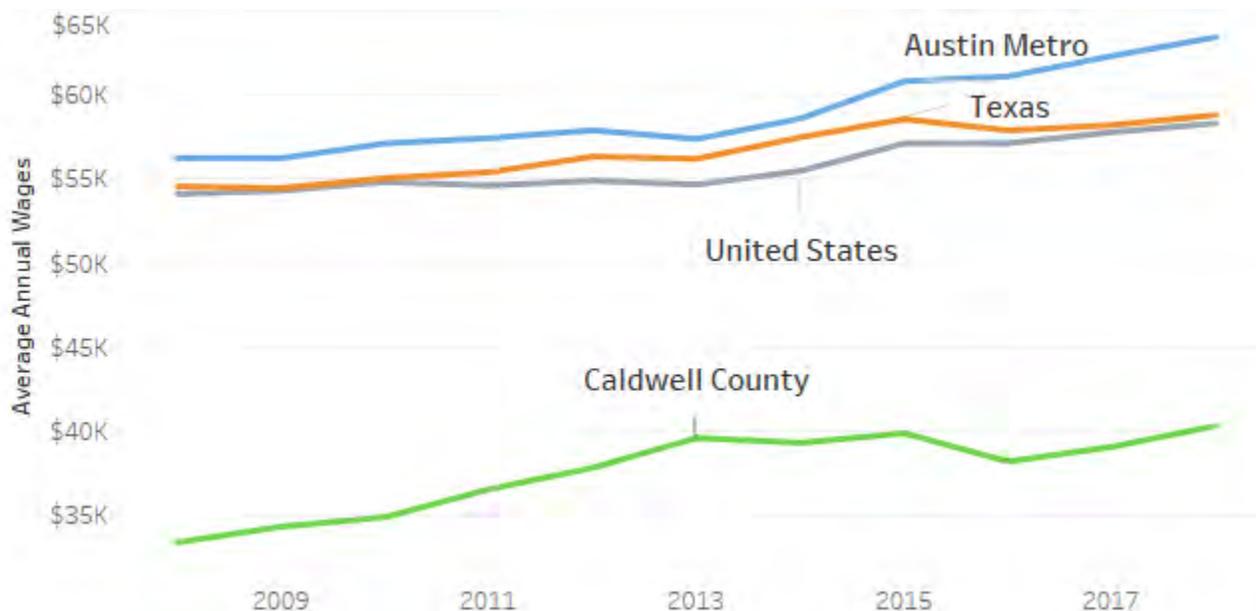
	2008	2013	2018	5-Year Growth (2013–2018)		10-Year Growth (2008–2018)	
				#	%	#	%
Caldwell County	33,393	39,601	40,320	718	2%	6,927	21%
Austin Metro	56,231	57,370	63,421	6,051	11%	7,190	13%
Texas	54,549	56,190	58,793	2,603	5%	4,244	8%
United States	54,103	54,661	58,304	3,642	7%	4,201	8%

Source: Bureau of Labor Statistics, Garner Economics.
Comparable data for Lockhart was not available. Figures adjusted for inflation.



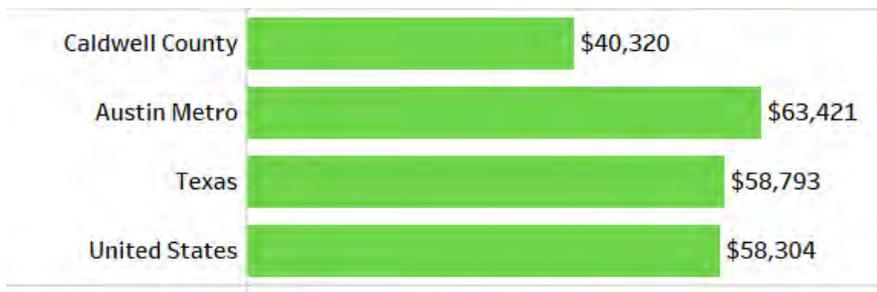
Estimated Annual Wages (continued)

Figure 5.13 Average Wage Growth (Adjusted for Inflation), 2008–2018



Source: Bureau of Labor Statistics, Garner Economics.
Comparable data for Lockhart was not available. Figures adjusted for inflation.

Figure 5.14 Average Annual Wage, 2019



Source: Bureau of Labor Statistics, Garner Economics.
Comparable data for Lockhart was not available. Figures adjusted for inflation.

In 2018, the estimated average wage per job in Caldwell County equaled \$40,320 annually or \$775 weekly. It should be noted that wage applies only to employment in Caldwell County and does not measure wages for those workers who live in the County but commute outside the area.

Caldwell County’s average annual wage is the lowest among the benchmark geographies and was well below the overall average wage for the Austin Metro of \$63,421. The metro area outperformed all comparisons, growing a total of 29% over the past decade. All wages including Caldwell County’s have grown over the past decade, even after adjusting for inflation.



Industry Sector Composition

Table 5.6 Industry Sector Composition, Average Annual Employment 2018

Industry Title	Caldwell County	Texas	United States
NAICS 62 Health Care and Social Assistance	18.3%	13.5%	14.9%
NAICS 44-45 Retail Trade	17.5%	10.9%	10.8%
NAICS 72 Accommodation and Food Services	11.8%	9.9%	9.5%
NAICS 31-33 Manufacturing	8.6%	7.2%	8.7%
NAICS 48-49 Transportation and Warehousing	8.6%	4.5%	4.2%
NAICS 23 Construction	7.9%	6.3%	5.1%
NAICS 92 Public Administration	6.7%	3.7%	5.1%
NAICS 56 Administrative and Waste Services	4.0%	6.7%	6.4%
NAICS 21 Mining, Quarrying, Oil and Gas Extraction	3.0%	2.0%	0.5%
NAICS 52 Finance and Insurance	2.8%	4.4%	4.1%
NAICS 81 Other Services	2.4%	2.7%	3.1%
NAICS 42 Wholesale Trade	2.4%	4.9%	4.0%
NAICS 11 Agriculture, Forestry, Fishing and Hunting	2.2%	0.5%	0.9%
NAICS 71 Arts, Entertainment, and Recreation	1.1%	1.2%	1.9%
NAICS 22 Utilities	0.9%	0.7%	0.6%
NAICS 61 Educational Services	0.8%	9.8%	8.7%
NAICS 53 Real Estate and Rental and Leasing	0.7%	1.8%	1.6%
NAICS 51 Information	0.4%	1.7%	2.0%
NAICS 55 Management of Companies and Enterprises	-	1.2%	1.6%
NAICS 54 Professional and Technical Services	-	6.4%	6.4%

Source: Bureau of Labor Statistics, All ownerships, Garner Economics

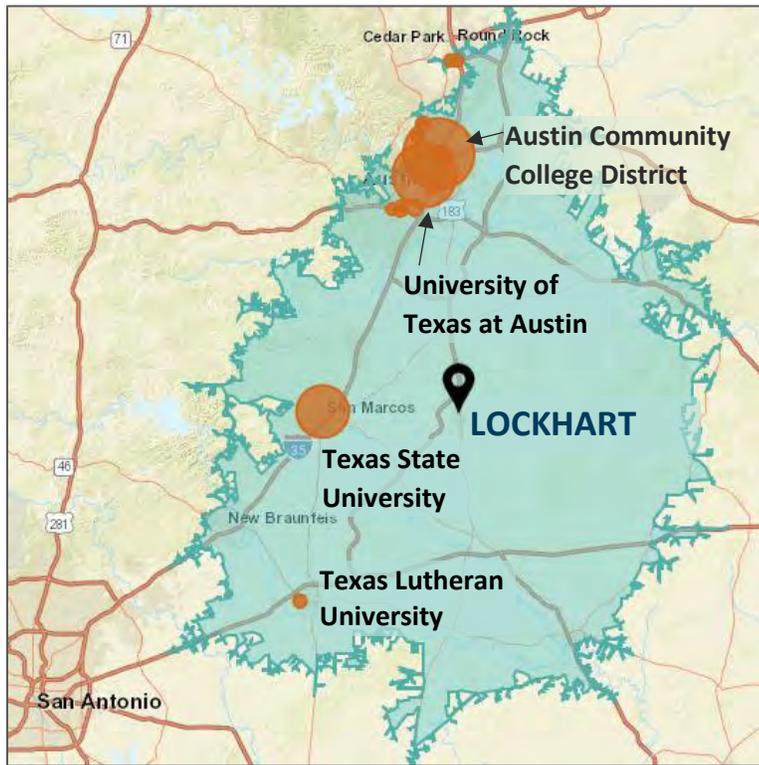
Lockhart data is not available. Austin Metro data was not used due to multiple sectors unavailable for disclosure reasons.

Caldwell County’s top industry sector by employment is *Health Care and Social Assistance* with 18.3% of total employment including government. *Retail Trade* was second highest for 2018, with 17.5% of the County’s workers are engaged in retail trade. Following *Retail Trade*, *Accommodation and Food Services* employed 11.8% of the workforce. Both *Management of Companies* and *Professional and Technical Services* were not available due to nondisclosure reasons.



Colleges & Universities

Figure 5.15 Colleges & Universities (45-Minute Drive-Time of Lockhart)
Size of marker relative to 2018 enrollment



Neither Lockhart nor Caldwell County has a college or university campus within their boundaries. However, 16 schools within 45 minutes have an enrollment of 177,218 students. The closest campus to Lockhart is Texas State University, located in San Marcos, with almost 43,000 students enrolled. Austin Community College District’s 62,000 students are distributed throughout the 11-campus system in the greater Austin area. The University of Texas at Austin is the second-largest school in this group with 55,000 students.

Colleges on this list offer certificates under two years upwards to doctoral degrees in a wide variety of programs. The largest detractor to this large number of students is the competition for talent in the area, particularly as the majority of institutions are located within Austin.

Table 5.7 College & University Enrollment, 2018 (45-Minute Drive-Time of Lockhart)

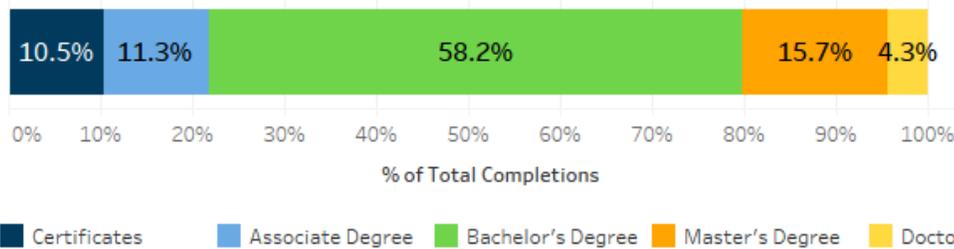
Institution Name	Highest Level Offered	2018 Enrollment
Austin Community College District	Associate degree	62,493
The University of Texas at Austin	Doctoral degree	55,097
Texas State University	Doctoral degree	42,924
Saint Edward's University	Master's degree	4,780
Strayer University-Texas	Master's degree	3,431
Texas Lutheran University	Master's degree	1,508
Huston-Tillotson University	Master's degree	1,192
Southern Careers Institute-Austin	Certificate < 2 yrs.	1,120
The Art Institute of Austin (moving to Bastrop in 2020)	Bachelor's degree	867
National American University (Harold D. Buckingham Graduate School)	Doctoral degree	820
CyberTex Institute of Technology	Certificate < 2 yrs.	675
South University-Austin	Doctoral degree	651
Auguste Escoffier School of Culinary Arts-Austin	Associate degree	641
The College of Health Care Professions-Austin	Associate degree	640
AOMA Graduate School of Integrative Medicine	Doctoral degree	218
Texas Health and Science University	Doctoral degree	161
Total 2018 Unduplicated Headcount		177,218

Source: National Center for Education Statistics, Garner Economics



Degrees & Certifications

Figure 5.16 Credentials Granted by Type, 2018

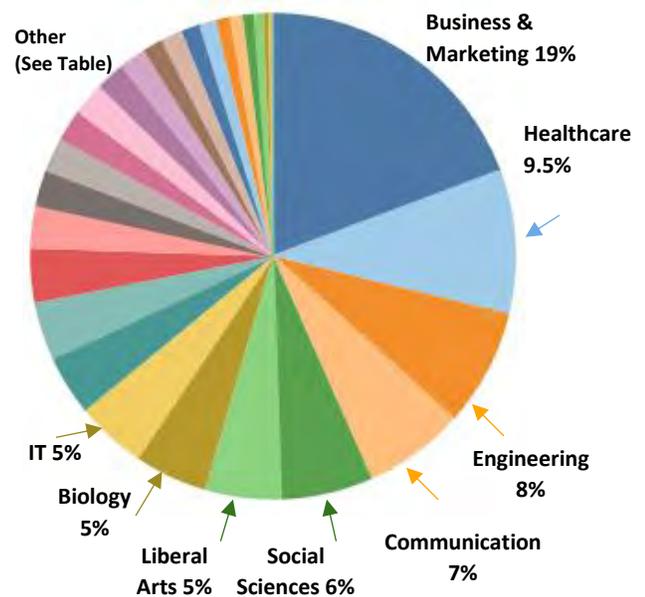


64,596
2018 Total
Degrees/Certificates

Table 5.8 Credentials Granted by Area of Study, 2018

Area of Study	Credentials Awarded
Business & Marketing	12,448
Health Professions	6,162
Engineering & Engineering Technologies	5,062
Communication & Journalism	4,322
Social Sciences	3,986
Liberal Arts & Group Studies	3,256
Biological & Biomedical Sciences	3,162
Computer & Information Sciences	2,990
Multi/Interdisciplinary Studies	2,606
Visual & Performing Arts	2,472
Psychology	2,324
Parks & Recreation	1,866
English Language	1,526
Public Administration	1,432
Education	1,418
Homeland Security & Protective Services	1,364
Family & Consumer Sciences	1,310
Physical Sciences	1,112
Mathematics	916
Foreign Languages	896
Legal Professions	828
History	700
Personal & Culinary Services	630
Precision Production & Mechanic/Repair Technologies	522
Agriculture & Natural Resources	502
Architecture	372
Philosophy & Religion	276
Construction Trades	82
Science Technologies	48
Transportation & Materials Moving	6
Total Degrees/Certificates Granted in 2018	64,596

Figure 5.17 Main Areas of Study, 2018



The number and type of credentials earned in the area surrounding Lockhart show a diversity that can be applied to many industry clusters. In one year, more than 64,500 students gained degrees or certifications.

What is unclear at the time of this report, is how the widespread shift from on-campus to online education will affect where students are likely to search for work and find opportunities when not finishing their degree on campus, for those larger institutions with a broad distribution of student population.

Source: National Center for Education Statistics, Garner Economics

Chapter 6: Local Specialization & Growth

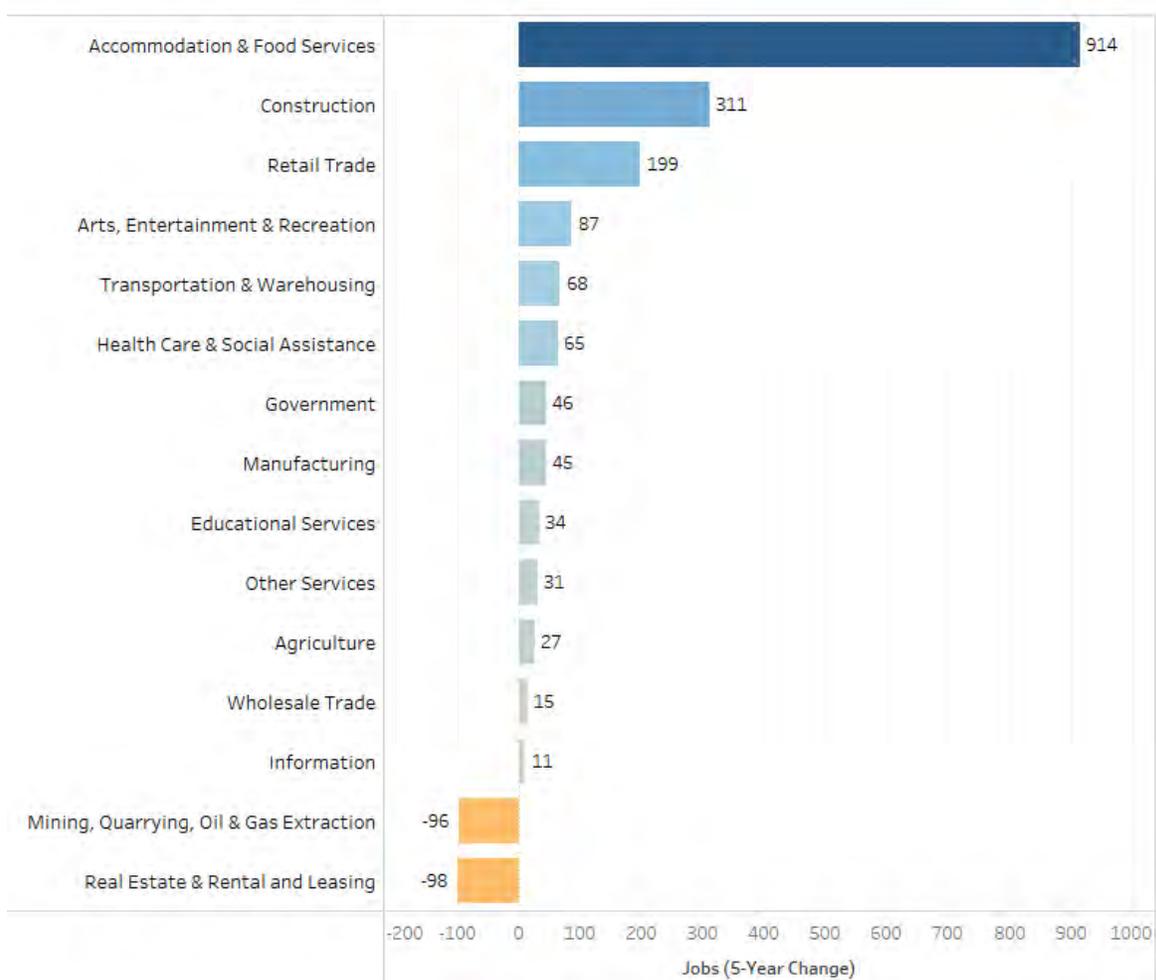
The following section provides a more detailed and in-depth assessment of Lockhart and Caldwell County. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The main goals are to provide historical context, reveal areas of unique specialization, and help uncover emerging trends and opportunities. The two main areas of analysis are major industries and occupational groups. Caldwell County provides the most recent and thorough set of data to examine the economy and is used for this section.

Measurements Included

- Major Industry Sector Change
- Industry Earnings
- Occupational Change
- Occupational Earnings
- Local Specialization & Growth

Major Industry Sector Change

Figure 6.1 Caldwell County Employment Change by Major Industry, 2013–2018
Ranked by Absolute Change



Source: Bureau of Labor Statistics, Garner Economic

Management of Companies & Enterprises and Professional, Scientific & Technical Services sectors do not have sufficient information available for analysis. 2019 data is unavailable due to disclosure.

Between 2013 and 2018, the largest absolute industry job gains in Lockhart came from *Accommodation & Food Services*, which increased by 914 jobs. The other two industry sectors with more than 100 jobs gained during this same period are *Construction* and *Retail Trade*, which grew by 311 jobs and 199 jobs respectively. Two sectors experienced job loss over the past five years: *Real Estate* (-98 jobs) and *Mining* (-96 jobs). Overall, Caldwell County had a net increase of more than 1,000 jobs, which includes employment that is considered covered.

Table 6.1 Caldwell County Employment Change by Major Industry, 2013–2018
Ranked by Absolute Change

Industry Sector	2013 Jobs	2018 Jobs	5-Year Change	5-Year % Change
Agriculture	145	172	27	19%
Mining, Quarrying, Oil & Gas Extraction	325	229	-96	-30%
Utilities	70	71	1	1%
Construction	302	613	311	103%
Manufacturing	623	668	45	7%
Wholesale Trade	168	183	15	9%
Retail Trade	1,157	1,356	199	17%
Transportation & Warehousing	598	666	68	11%
Information	18	29	11	61%
Finance & Insurance	223	218	-5	-2%
Real Estate & Rental and Leasing	154	56	-98	-64%
Administrative & Support, Waste Management & Remediation	307	310	3	1%
Educational Services	29	63	34	117%
Health Care & Social Assistance	1,353	1,418	65	5%
Arts, Entertainment & Recreation	-	87	87	-
Accommodation & Food Services	-	914	914	-
Other Services	152	183	31	20%
Government	472	518	46	10%
Total	8,017	9,054	1,037	13%

Source: Bureau of Labor Statistics, QCEW, Garner Economics

Management of Companies & Enterprises and Professional, Scientific & Technical Services sectors do not have sufficient information available for analysis. 2019 data is unavailable due to disclosure.

Industry Earnings

A comparison of Caldwell County’s average industry earnings to national averages offers insights into areas of cost-saving opportunities. The average annual wage for all private industries in Caldwell County is \$39,091, which is 32% below the national average of \$57,198. All but three industry sector wages reported for the County are below national averages — two of which are significantly higher. *Transportation & Warehousing* wages are 44% above national levels and *Arts, Entertainment & Recreation* wages are also above the nation.

Table 6.2 Caldwell County Average Annual Industry Salary Comparison, 2018
Ranked by Highest Local Wages

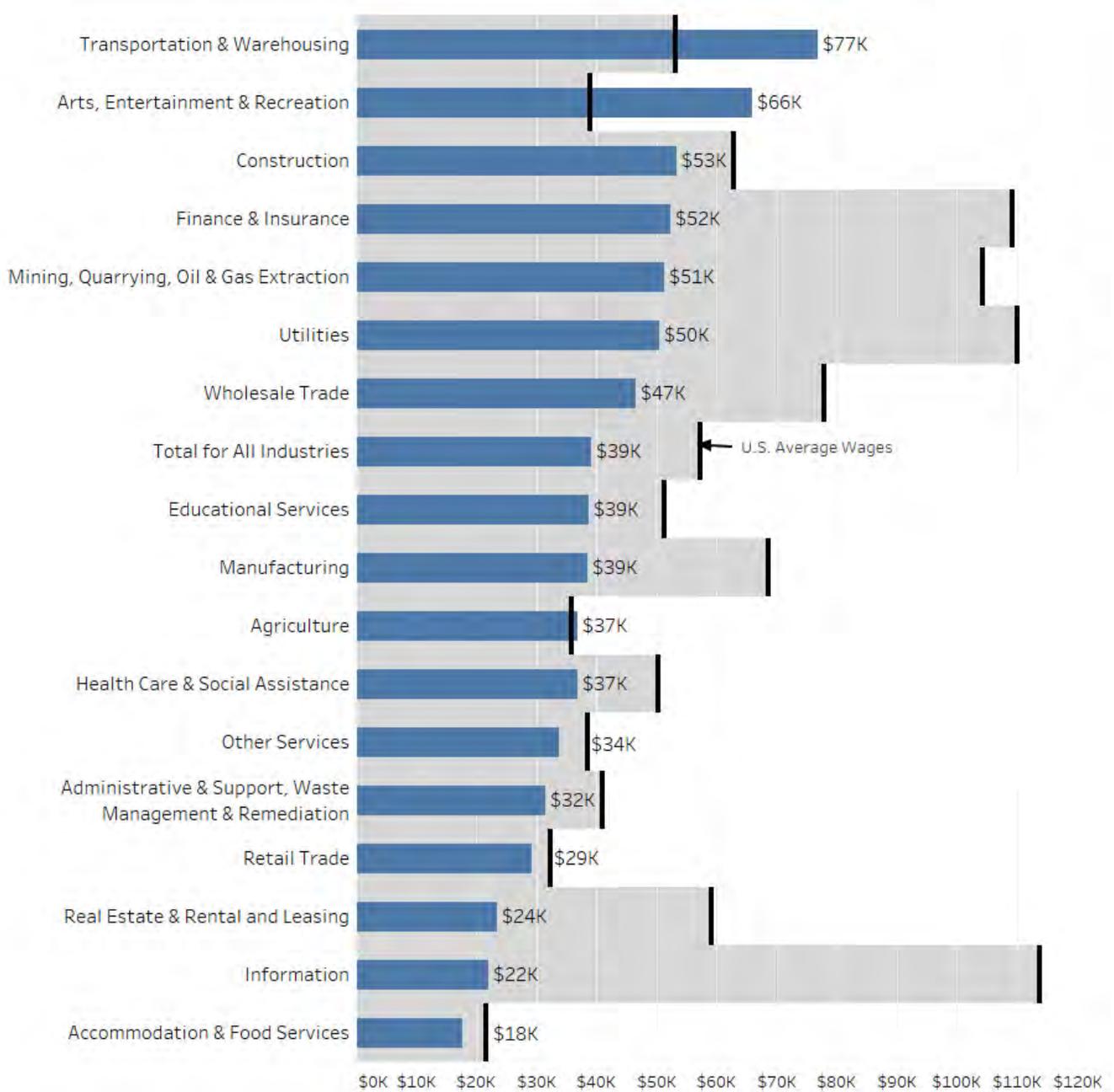
Wages Higher than National are Highlighted in Green

Industry Sectors	Caldwell County Average Wages	United States Average Wages	Percent Difference
Agriculture	\$36,866	\$35,841	3%
Mining, Quarrying, Oil & Gas Extraction	\$51,240	\$104,257	-51%
Utilities	\$50,422	\$109,957	-54%
Construction	\$53,303	\$62,727	-15%
Manufacturing	\$38,548	\$68,525	-44%
Wholesale Trade	\$46,501	\$77,870	-40%
Retail Trade	\$29,155	\$32,362	-10%
Transportation & Warehousing	\$76,747	\$53,197	44%
Information	\$22,059	\$113,781	-81%
Finance & Insurance	\$52,244	\$109,231	-52%
Real Estate & Rental and Leasing	\$23,582	\$59,129	-60%
Administrative & Support, Waste Management & Remediation	\$31,549	\$40,985	-23%
Educational Services	\$38,812	\$51,250	-24%
Health Care & Social Assistance	\$36,783	\$50,326	-27%
Arts, Entertainment & Recreation	\$65,913	\$38,887	69%
Accommodation & Food Services	\$17,757	\$21,559	-18%
Other Services	\$33,725	\$38,464	-12%
Total — All Industries	\$39,091	\$57,198	-32%

Source: Bureau of Labor Statistics, QCEW, Garner Economics

Management of Companies & Enterprises information is not available and is excluded due to disclosure.

**Figure 6.2 Caldwell County Average Annual Industry Salary Comparison, 2018
Ranked by Highest Local Wages**



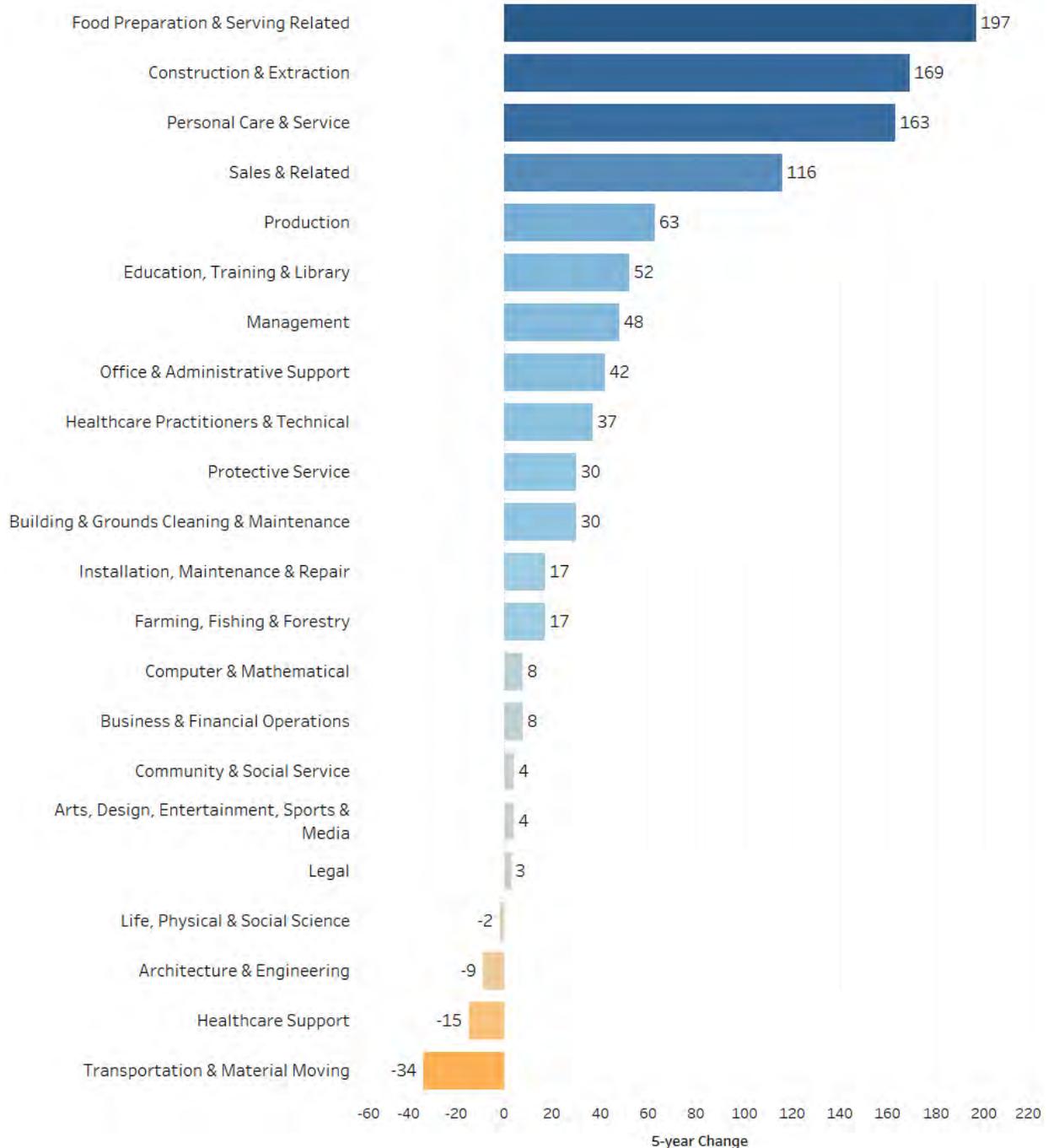
Source: Bureau of Labor Statistics, QCEW, Garner Economics

Management of Companies & Enterprises information is not available and is excluded due to disclosure.

Major Occupational Change

Over the last five years, Caldwell County saw all but four occupational groups gain employment. Occupations that lost jobs include *Transportation and Material Moving* (-34 jobs); *Healthcare Support* (-15 jobs); *Architecture & Engineering* (-9 Jobs); and *Life, Physical & Social Science* occupations (-2 jobs). Major growth occurred in *Food Preparation & Serving Related* (+197 jobs); *Construction & Extraction* (+169 jobs); and *Personal Care & Services* (+163 jobs).

Figure 6.3 Caldwell County Employment Change by Occupational Group, 2014–2019



Source: Jobs EQ, Workforce Solutions Rural Capital Area, Garner Economics

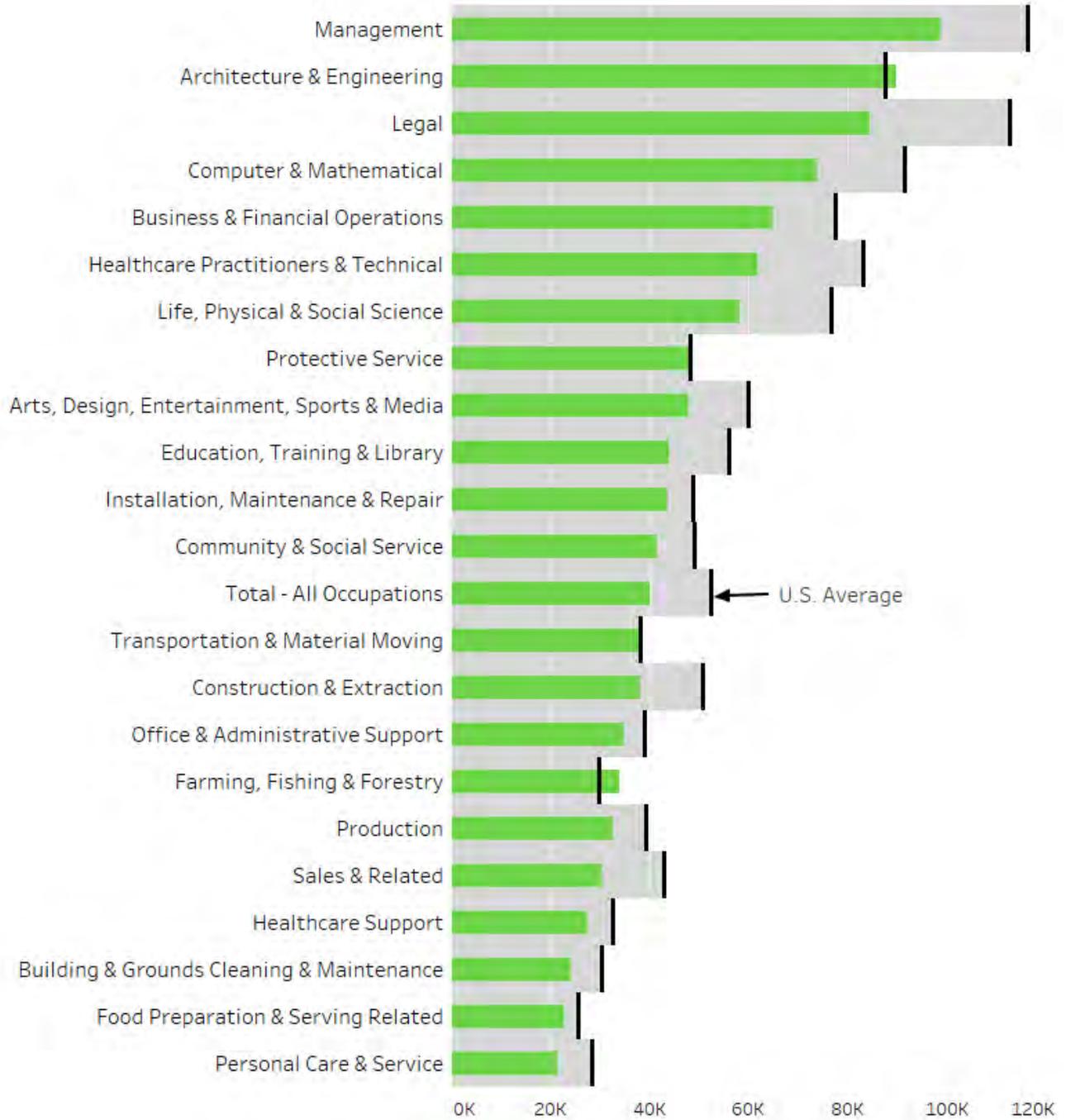
Table 6.3 Caldwell County Employment Change by Major Occupational Group, 2013–2018
Ranked by Absolute Change

Occupation	2014 Jobs	2019 Jobs	5-Year Change
Food Preparation & Serving Related	837	1,034	197
Construction & Extraction	684	853	169
Personal Care & Service	334	497	163
Sales & Related	1,005	1,121	116
Production	539	602	63
Education, Training & Library	689	741	52
Management	1,076	1,124	48
Office & Administrative Support	1,156	1,198	42
Healthcare Practitioners & Technical	540	577	37
Protective Service	262	292	30
Building & Grounds Cleaning & Maintenance	364	394	30
Installation, Maintenance & Repair	437	454	17
Farming, Fishing & Forestry	97	114	17
Computer & Mathematical	91	99	8
Business & Financial Operations	277	285	8
Community & Social Service	195	199	4
Arts, Design, Entertainment, Sports & Media	112	116	4
Legal	53	56	3
Life, Physical & Social Science	45	43	-2
Architecture & Engineering	94	85	-9
Healthcare Support	309	294	-15
Transportation & Material Moving	691	657	-34
Total — All Occupations	9,887	10,836	948

Source: Jobs EQ, Workforce Solutions Rural Capital Area, Garner Economics

Occupational Earnings

**Figure 6.4 Caldwell County Average Annual Occupational Salary Comparison, 2018
Ranked by Highest Local Wages**



Source: Jobs EQ, Workforce Solutions Rural Capital Area, Garner Economics

A comparison of the same-occupation average annual earnings for Caldwell County to the national average wage revealed that all but three occupations earned less than the national average. The average annual wage for all occupations in the County was \$40,200, compared to \$52,400 for the national average, a difference of 23%. None of the wage differentials topped 30% over or under, aligning closer to the national level than industry wage comparisons.

Table 6.4 Caldwell County Average Annual Occupational Salary Comparison, 2018
Ranked by Highest Local Wages
Wages Higher than National are Highlighted in Green

Occupation Group	Caldwell County Average Wages	United States Average Wages	Percent Difference
Management	\$98,600	\$116,200	-15%
Business & Financial Operations	\$65,000	\$77,400	-16%
Computer & Mathematical	\$73,700	\$91,500	-19%
Architecture & Engineering	\$89,700	\$87,400	3%
Life, Physical & Social Science	\$58,200	\$76,500	-24%
Community & Social Service	\$41,500	\$49,100	-15%
Legal	\$84,300	\$112,500	-25%
Education, Training & Library	\$44,000	\$55,900	-21%
Arts, Design, Entertainment, Sports & Media	\$47,800	\$59,900	-20%
Healthcare Practitioners & Technical	\$61,900	\$83,100	-26%
Healthcare Support	\$27,500	\$32,500	-15%
Protective Service	\$48,000	\$48,300	-1%
Food Preparation & Serving Related	\$22,900	\$25,600	-11%
Building & Grounds Cleaning & Maintenance	\$24,300	\$30,400	-20%
Personal Care & Service	\$21,400	\$28,300	-24%
Sales & Related	\$30,400	\$43,000	-29%
Office & Administrative Support	\$34,700	\$39,000	-11%
Farming, Fishing & Forestry	\$34,000	\$29,900	14%
Construction & Extraction	\$38,300	\$50,700	-24%
Installation, Maintenance & Repair	\$43,700	\$48,700	-10%
Production	\$32,700	\$39,200	-17%
Transportation & Material Moving	\$38,400	\$38,200	1%
Total – All Occupations	\$40,200	\$52,400	-23%

Source: Jobs EQ, Workforce Solutions Rural Capital Area, Garner Economics

Major Industry Sector Specialization & Growth

Major industry sector specialization focuses on the geographic concentrations of similarly classified industries. For many sectors, there exist interconnections between suppliers, occupations, and associated supporting institutions.

Nine industry sectors have a local specialization greater than one and experienced job growth in the past five years in Caldwell County. These make up the *Competitive* category and can be found below under the green heading.

Five industry sectors had local specialization below one, but experienced job growth within the past five years and are considered *Emerging*. They can be found below under the orange heading.

Three sectors are classified as *Declining* due to job loss and low local specialization; they are below under the red heading.

Finally, one industry sector is considered *At-Risk* due to a high LQ but experienced job losses in the last five years. This sector is *Mining, Quarrying, Oil & Gas Extraction* and is often prone to cyclical employment.

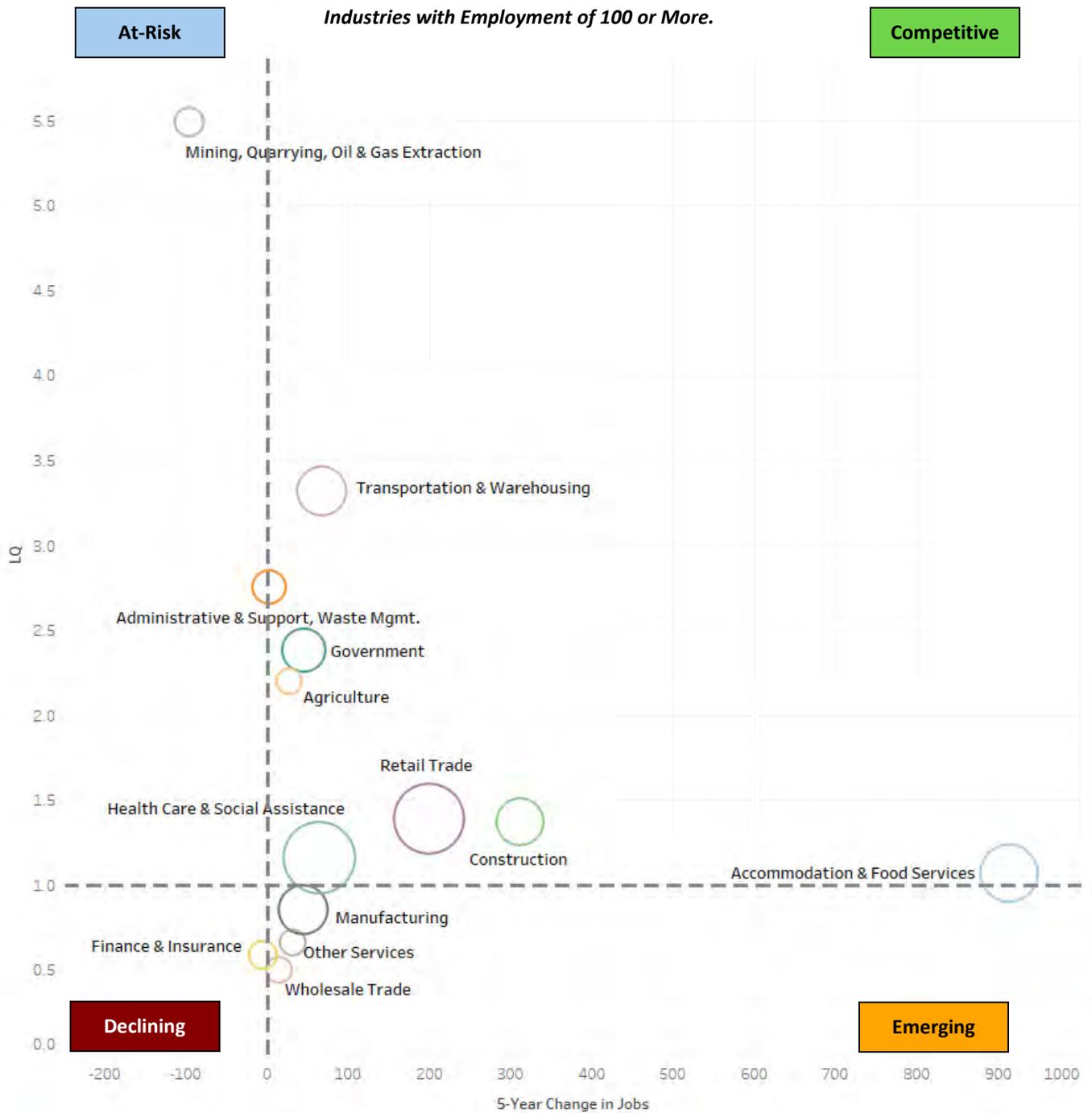
Table 6.5 Caldwell County Industry Specialization and Growth

Industry Sector	2013–2018 Employment Change	2018 Location Quotient	2018 Jobs
Competitive			
Accommodation & Food Services	914	1.07	914
Construction	311	1.37	613
Retail Trade	199	1.39	1,356
Transportation & Warehousing	68	3.32	666
Health Care & Social Assistance	65	1.16	1,418
Government	46	2.38	518
Agriculture	27	2.2	172
Administrative & Support, Waste Management & Remediation	3	2.75	310
Utilities	1	3.47	71
Emerging			
Manufacturing	45	0.85	668
Educational Services	34	0.35	63
Other Services	31	0.66	183
Wholesale Trade	15	0.5	183
Information	11	0.17	29
Declining			
Arts, Entertainment & Recreation	87	0.59	87
Finance & Insurance	-5	0.59	218
Real Estate & Rental and Leasing	-98	0.4	56
At-Risk			
Mining, Quarrying, Oil & Gas Extraction	-96	5.49	229

Source: Bureau of Labor Statistics, QCEW, Garner Economics

Management of Companies & Enterprises information is not available and is excluded due to disclosure

Figure 6.5 Caldwell County Industry Specialization & Growth Industries with Employment of 100 or More.



- Accommodation & Food Services
- Government
- Retail Trade
- Administrative & Support, Waste Mgmt.
- Health Care & Social Assistance
- Transportation & Warehousing
- Agriculture
- Manufacturing
- Wholesale Trade
- Construction
- Mining, Quarrying, Oil & Gas Extraction
- Other Services
- Finance & Insurance

Source: Bureau of Labor Statistics, QCEW, Garner Economics
Management of Companies & Enterprises information is not available and is excluded due to disclosure.

Occupational Specialization & Growth

Occupational groupings represent similar skills and educational qualifications, but not necessarily specific industry sectors. In this analysis, major occupational groups are evaluated for their growth and concentration.

Eleven occupational groups have a local specialization greater than one and experienced job growth in the past five years in Caldwell County. These make up the *Competitive* category and are below under the green heading.

Seven occupations had local specialization below one but experienced job growth within the past five years and are considered *Emerging*. They are below under the orange heading.

Three sectors are classified as *Declining* due to job loss and low local specialization and are under the red heading.

Finally, one industry sector is considered *At-Risk* due to an LQ of one or more, but experienced job losses in the last five years. This sector is *Healthcare Support* and due to growing national demand in healthcare, this is likely to rebound soon.

Table 6.6 Caldwell County Occupational Specialization and Growth

Description	2014–2019 Change	2019 Location Quotient	2019 Jobs
Competitive			
Food Preparation & Serving Related	197	1.11	1034
Construction & Extraction	169	1.72	853
Personal Care & Service	163	1.05	497
Sales & Related	116	1.05	1121
Education, Training & Library	52	1.22	741
Management	48	1.67	1124
Protective Service	30	1.26	292
Building & Grounds Cleaning & Maintenance	30	1.05	394
Installation, Maintenance & Repair	17	1.09	454
Farming, Fishing & Forestry	17	1.65	114
Community & Social Service	4	1.09	199
Emerging			
Production	63	0.93	602
Office & Administrative Support	42	0.77	1198
Healthcare Practitioners & Technical	37	0.93	577
Computer & Mathematical	8	0.31	99
Business & Financial Operations	8	0.5	285
Arts, Design, Entertainment, Sports & Media	4	0.6	116
Legal	3	0.62	56
Declining			
Life, Physical & Social Science	-2	0.5	43
Architecture & Engineering	-9	0.46	85
Transportation & Material Moving	-34	0.88	657
At-Risk			
Healthcare Support	-15	0.99	294

Source: Jobs EQ, Workforce Solutions Rural Capital Area, Garner Economics

Figure 6.6 Caldwell County Occupational Specialization and Growth
Occupations Employing 100 or More



Source: Jobs EQ, Workforce Solutions Rural Capital Area, Garner Economics

Chapter 7: Optimal Targets for Lockhart, Texas

The optimal business sectors selection is based on the specific characteristics of the economy and assets of Lockhart, Texas. These recommended targets are designed to assist the City and its economic development efforts in prioritizing resources and focusing on sectors in which Lockhart holds a competitive advantage and/or has growth potential. This approach will help policymakers prioritize the City’s community and economic development strategy.

Garner Economics uses a desirability and feasibility screening matrix to determine the optimal targets. Desirability begins by considering the types of business sectors that stakeholders of Lockhart would like to see in the community (Figure 7.1). Feasibility includes what the City can reasonably achieve in the short- to mid-term, based on current or planned locational assets and an analytical review of the economy.

Using results from the Economic and Labor Force research, A&C, a community survey and field visits — four business and industry families were chosen that best match Lockhart’s unique competitive advantages to the needs of particular industry sectors. These targets are:

- Auto Parts, Metal & Electronic Manufacturing
- Food & Beverage Processing
- Logistics & Distribution
- Pharmaceutical, Medical Supplies & Medical Device Manufacturing

For each targeted business sector, the community’s competitive advantages are presented, along with national trends and projections of the targets. In some cases, target sectors are flat or losing jobs nationally, but the particular set of economic development assets in Lockhart position it to capture any growing demand.

It should also be noted that this report was written in the height of the COVID-19 pandemic, which brought an added layer of complexity and opportunity. In selecting targets, Garner Economics also looked forward to predicted changes in the national economy due to supply chain shifts and reshoring. During the final stages of this analysis, Tesla announced the location of their new \$1.1 billion, 5,000-job assembly plant near Austin. The plant will be approximately 25 minutes from Lockhart and should have a positive impact on attracting businesses.

For each target, a profile is presented with a list of individual subsectors and accompanying NAICS classifications as well as a list of rationales that are identified as appealing to the needs of **prospects (P) or the community (C)**. This material can be used in marketing and community support efforts or to help economic development personnel prioritize targeting efforts.

Figure 7.1: Optimal Target Screening Process



Targets

- Auto Parts, Metal & Electronic Mfg.
- Food & Beverage Processing
- Logistics & Distribution
- Pharmaceutical, Medical Supplies & Medical Device Mfg.

Figure 7.2 Optimal Targets for Lockhart





**TARGET: Auto Parts,
Metal & Electronic Mfg.**

Manufacturing remains a strong economic driver for many communities and is a desirable target. This target includes *Auto Parts, Metalworking, Computer, and Electronics Manufacturing*. Caldwell County has just over 600 people employed in *Manufacturing*, which grew 7% in the past five years. The number of production workers in the greater Austin Metro is more than 40,000 workers. Understanding that Lockhart is part of the Austin Metro, but can also access a workforce further south and west, a 45-minute drive-time analysis reveals nearly 60,000 *Manufacturing* employees. While the competition for talent remains strong, the sheer number of manufacturing talent in the region is positive.

Texas has three, soon to be four vehicle assembly plants — GM, Peterbilt, Toyota and the recently announced Tesla Gigafactory. Tesla will build its Cybertruck, Semi truck and Model Y at the 2,000-acre site near the Austin International Airport. GM’s facility is located in Arlington, and Peterbilt builds its trucks in Denton, where its headquarters is located. Toyota began production of pickup trucks in San Antonio in 2006, only 80 miles from Lockhart.

While existing facilities may have established supply chains, the new Tesla factory will create a surge of automotive supplier location movement. The supply chain model Tesla began with included more vertical integration with the main components made by them. Tesla is a comparatively young mass-production company and has not yet built the models slated for the Austin facility. Their supply chain will continue to evolve. Tier 1 suppliers will likely locate on the same campus as the assembly facility while Tier 2 & 3 suppliers, in particular, will likely want to locate in the area surrounding the plant. Lockhart stands to benefit from high-value automotive part manufacturers serving Tesla.

A change in policy could also help the attraction of automotive suppliers, such as the new U.S./Mexico/Canada (USMCA) trade agreement taking effect July 1, 2020. This agreement increases the requirement for North American made automotive content from the NAFTA 62% up to 75% for “tariff-free” status.

Target rationales include:

- Centrally located for major regional & national markets (P)
- Well positioned to serve international markets (P)
- Proximity to Austin-Bergstrom International Airport (P)(C)
- Within ½ hour of major university/college (P)(C)
- Competitive cost of labor (P)
- Availability of sites (P)
- Availability of tax-exempt financing for new industrial facilities (P)
- Availability of local incentives (P)
- Low cost of living (P)(C)
- Historical national job growth of 17.7% for past decade (P)(C)
- National average wage \$70,145 (C)
- 12,947 degrees and certificates granted in majors related to target (P)



Legend: Items appealing to needs of prospects (P) or community (C).

Texas, and Austin in particular, is well known for *Electronics Manufacturing*. Dell is headquartered in Round Rock, and Apple’s new campus in Austin brings industry giants close to Lockhart. Leveraging existing knowledge in the region creates opportunity to attract *Electronics, Computers, and Components Manufacturing* to Lockhart.

Metalworking companies like Pure Castings, which manufactures precision investment castings, provide a great example of operations that will flourish in Lockhart.

There were nearly 13,000 degrees or certificates granted in the 45-minute drive-time surrounding Lockhart that were related to *Manufacturing and Business Management*. Nearly half of those awards are for *Business, Management, Marketing & Related* programs while about 2,500 are in *Engineering and Engineering Technologies*.

Table 7.1 Regional Degree Completions in Majors Related to Target, 2018

Area of Study	Certificates	Associate	Bachelor's	Master's+	Total
Business, Management, Marketing & Related	1,133	396	2,937	1,721	6,187
Engineering		66	1,430	629	2,125
Communication, Journalism & Related	5	42	1,842	134	2,023
Computer, Information Sciences & Support Services	268	209	780	231	1,488
Mathematics & Statistics	20	27	358	49	454
Engineering Technologies & Related Fields	126	90	137	53	406
Precision Production	132	41			173
Mechanic and Repair Technologies/Technicians	48	40			88
Transportation & Materials Moving			3		3
Total	1,732	911	7,487	2,817	12,947

*Graduates from colleges & universities in a 45-minute drive-time from Lockhart are included.
Source: National Center for Education Statistics, Garner Economics*

Table 7.2 Target Employment, Change and Wages, United States, 2019

NAICS	Industry Description	2019 Jobs	10-Year Change	10-Year % Change	10-Year Forecast	10-Year % Forecast	Average Wages
3321	Forging & Stamping	101,989	13,046	14.7%	-2,369	-2.3%	\$59,242
3323	Architectural & Structural Metals Mfg.	400,344	53,165	15.3%	15,990	4.0%	\$56,010
3325	Hardware Mfg.	25,664	777	3.1%	-1,368	-5.3%	\$62,521
3326	Spring & Wire Product Mfg.	44,119	281	0.6%	-1,608	-3.6%	\$54,410
3327	Machine Shops; Turned Product; Screw, Nut & Bolt Mfg.	375,899	57,816	18.2%	13,608	3.6%	\$56,155
3329	Other Fabricated Metal Product Mfg.	283,590	29,737	11.7%	3,959	1.4%	\$64,180
3332	Industrial Machinery Mfg.	121,644	18,344	17.8%	249	0.2%	\$85,153
3334	Ventilation, Heating, Air-Conditioning & Commercial Refrigeration Equipment Mfg.	137,203	6,529	5.0%	-4,337	-3.2%	\$57,467
3335	Metalworking Machinery Mfg.	181,946	22,304	14.0%	-726	-0.4%	\$62,693
3341	Computer & Peripheral Equipment Mfg.	161,438	-7,516	-4.4%	-12,756	-7.9%	\$203,935
3353	Electrical Equipment Mfg.	145,552	885	0.6%	-1,379	-0.9%	\$72,618
3359	Other Electrical Equipment & Component Mfg.	149,472	27,444	22.5%	12,141	8.1%	\$69,550
3363	Motor Vehicle Parts Mfg.	606,115	188,919	45.3%	38,514	6.4%	\$60,262
	Total/Weighted Average	2,734,976	411,732	17.7%	59,917	2.2%	\$70,145

Certain subsectors included in target matrix (Figure 7.1) have different naming than NAICS code subsector and the business activity falls under NAICS listed above. Source: EMSI, Garner Economics

Essential to attracting target companies is the talent in the area along with the workforce pipeline. Key, high-demand occupations for businesses within this target family include production, engineering, management, and professional positions. Many of these occupations are classified as having a Bright Outlook by O*Net indicating rapid growth or numerous job openings — or both — on a national level. For the key occupations listed below, the typical on-the-job training and education needed for entry are included. The annual median wage rate for the metro is in the last column; however, as noted earlier in the report, Lockhart’s wages will be more competitive.

Table 7.3 Key High-Demand Occupations for Target, Austin Metro, 2019

Occupation	2019 Metro Employment	Typical On-the-Job Training	Typical Education Needed	Median Wage
General and Operations Managers ☀	21,520	None	Bachelor's	\$101,450
Bookkeeping, Accounting & Auditing Clerks ☀	11,990	Moderate-term	Some college, no degree	\$42,280
Laborers, Freight, Stock & Material Movers, Hand ☀	11,440	Short-term	None	\$26,910
Stockers and Order Fillers	10,810	Short-term	High school	\$29,010
Maintenance and Repair Workers, General ☀	9,240	Moderate-term	High school	\$36,680
Heavy and Tractor-Trailer Truck Drivers ☀	8,120	Short-term	Postsecondary Certificate	\$40,080
Shipping, Receiving & Inventory Clerks	4,820	Short-term	High school	\$33,840
Light Truck Drivers ☀	4,420	Short-term	High school	\$41,820
Inspectors, Testers, Sorters, Samplers & Weighers	4,050	Moderate-term	High school	\$39,480
Miscellaneous Assemblers and Fabricators	3,910	Moderate-term	High school	\$29,210
Training and Development Specialists ☀	2,970	None	Bachelor's	\$56,290
First-Line Supervisors of Production and Operating Workers	2,760	None	High school	\$61,940
Electrical Engineers	2,590	None	Bachelor's	\$102,020
Heating, Air Conditioning & Refrigeration Mechanics and Installers ☀	2,460	Long-term	Postsecondary Certificate	\$42,500
Production, Planning & Expediting Clerks	2,150	Moderate-term	High school	\$42,300
Mechanical Engineers	2,100	None	Bachelor's	\$88,940
Electrical, electronic & electromechanical assemblers, except coil winders, tapers & finishers	1,810	Moderate-term	High school	\$31,220
Industrial Engineers ☀	1,780	None	Bachelor's	\$95,740
Machinists	1,740	Long-term	High school	\$47,690
Helpers—Production Workers ☀	1,670	Short-term	High school	\$29,060
Welders, Cutters, Solderers & Brazers	1,650	Moderate-term	High school	\$42,410
Structural Metal Fabricators and Fitters	540	Moderate-term	High school	\$36,290
Coating, Painting & Spraying Machine Setters, Operators & Tenders	460	Moderate-term	High school	\$41,080
Computer Numerically Controlled Tool Operators	290	Moderate-term	High school	\$42,220
Computer Numerically Controlled Tool Programmers	100	Moderate-term	Postsecondary Certificate	\$64,890

Source: U.S. Bureau of Labor, O*Net OnLine, Garner Economics

☀ — Bright Outlook (O*Net) noting occupations with rapid growth or numerous job openings nationally.

Finding candidates for in-demand jobs can come from a variety of occupations. Having skills that can transfer to these in-demand positions allows for flexibility in recruitment. O*Net provides a basis for listing similar occupations with capabilities that match key jobs needed for the target. This allows a wider net to evaluate talent in the area.

Table 7.4 Skills Transferability, Key Target Occupations, 2019

Occupation	Compatible Occupations
Coating, Painting & Spraying Machine Setters, Operators & Tenders	Sawing Machine Operators; Textile Cutting Machine Operators; Cutting and Slicing Machine Operators; Cutting, Punching, and Press Machine Operators; Conveyor Operators; Mine Cutting and Channeling Machine Operators; Molding and Casting Workers;
Computer Numerically Controlled Tool Operators	Geothermal Technicians; Aircraft Structure, Surfaces, Rigging, and Systems Assemblers; Electronic Equipment Installers and Repairers, Motor Vehicles; Heat Treating Equipment Operators; Rolling Machine Operators; Crushing, Grinding, and Polishing Machine Operators; Stationary Engineers and Boiler Operators
Computer Numerically Controlled Tool Programmers	Mechanical Engineering Technicians; Tool and Die Makers; Manufacturing Production Technicians; Mechanical Engineering Technologists; Fabric and Apparel Patternmakers; Photonics Technicians; Medical Appliance Technicians
Electrical, Electronic & Electromechanical Assemblers, Except Coil Winders, Tapers & Finishers	Milling and Planing Machine Operators; Team Assemblers; Electromechanical Equipment Assemblers; Paper Goods Machine Setters, Operators, and Tenders; Sawing Machine Operators; Lathe and Turning Machine Tool Operators
Heating, Air Conditioning & Refrigeration Mechanics and Installers 🌟	Maintenance and Repair Workers, General; Control and Valve Installers and Repairers; Electronic Equipment Installers and Repairers, Motor Vehicles; Construction Carpenters; Commercial Divers; Geothermal Technicians; Weatherization Installers and Technicians
Industrial Engineers 🌟	Industrial Engineering Technologists; Commercial and Industrial Designers; Mechanical Drafters; Logistics Analysts; Civil Engineering Technicians; Production, Planning, and Expediting Clerks; Electrical Drafters
Inspectors, Testers, Sorters, Samplers & Weighers	Electrical and Electronic Equipment Assemblers; Weighers, Measurers, Checkers, and Samplers, Recordkeeping; Team Assemblers; Log Graders and Scalers; Office Machine Operators; Mail Clerks and Mail Machine Operators; Milling and Planing Machine Operators; Etchers and Engravers
Machinists	Multiple Machine Tool Operators; Drilling and Boring Machine Tool Operators; Welders, Cutters, and Welder Fitters; Aircraft Structure, Surfaces, Rigging, and Systems Assemblers; Extruding and Forming Machine Operators; Tool Grinders, Filers, and Sharpeners; Patternmakers
Maintenance and Repair Workers, General 🌟	Recreational Vehicle Service Technicians; Outdoor Power Equipment and Other Small Engine Mechanics; Helpers—Installation, Maintenance, and Repair Workers; Pipelayers; Septic Tank Servicers and Sewer Pipe Cleaners; Weatherization Installers and Technicians; Helpers—Extraction Workers
Mechanical Engineers	Automotive Engineers; Electrical Engineering Technologists; Industrial Engineering Technologists; Logistics Engineers; Manufacturing Engineering Technologists; Commercial and Industrial Designers; Water/Wastewater Engineers
Production, Planning & Expediting Clerks	Order Clerks; Procurement Clerks; Tellers; Hotel, Motel, and Resort Desk Clerks; Bill and Account Collectors; First-Line Supervisors of Personal Service Workers; Office Clerks, General
Structural Metal Fabricators and Fitters	Floor Layers; Glaziers; Paperhangers; Machine Feeders and Offbearers; Helpers—Pipelayers, Plumbers, Pipefitters, and Steamfitters; Foundry Mold and Coremakers; Stone Cutters and Carvers
Welders, Cutters, Solderers & Brazers	Molding and Casting Workers; Tile and Marble Setters; Drilling and Boring Machine Tool Operators; Lathe and Turning Machine Tool Operators; Grinding and Polishing Workers, Hand; Tool Grinders, Filers, and Sharpeners; Heat Treating Equipment Operators

Source: U.S. Bureau of Labor, O*Net OnLine, Garner Economics

🌟 — Bright Outlook (O*Net) noting occupations with rapid growth or numerous job openings nationally.



The *Food and Beverage* industry grew 14.2% over the past decade nationally. Continued growth is expected to be about 5% for the next decade. *Breweries, Wineries and Distilleries* showed the strongest growth with *Breweries* increasing a whopping 240% over the past 10 years. These three sectors will continue to be strong moving forward, followed by *Seasoning & Dressing Manufacturing* (12.2%), *Animal Food Manufacturing*, and *Farm Product Warehousing* (10.4%).² *Beverage Manufacturing* extends past the alcoholic drinks with additive water and energy drinks leading growth.

The industry has been undergoing a shift, with consumers increasingly choosing healthy, fresh, organic, local, and ready-to-eat alternatives over traditional products that are mass-produced. *Food and Beverage Processing* will tie in strongly with distribution systems — particularly the growing delivery business.

A recent CBRE industrial real estate report suggested that an additional 75 million to 100 million square feet of industrial freezer/cooler space will be needed to meet the demand generated by online grocery sales in the next five years. Demand for cold storage — not necessarily freezer — has been increasing even before the pandemic.

Lockhart is well situated for *Food and Beverage Processing* with ample water, proximity to regional and national markets, and proximity to agricultural products. Caldwell County has a high LQ or concentration, for *Poultry & Egg Production* with an LQ of 43.7. *Animal Production* has an LQ of 8.3 for the County as well. LQ is an indicator for concentration of employment (usually) compared to total employment against the national ratio. In general, an LQ above 1.2 is a good sign.

The *Food & Beverage Processing* target is a natural fit for Lockhart and ties right into its renowned reputation for Texas barbeque.

² Source: Emsi national data, 2019

Target rationales include:

- Agricultural product in region (P)
- Availability of water/wastewater treatment capacity (P)
- Centrally located for major regional & national market (P)
- Well positioned to serve international markets (P)
- Proximity to Austin-Bergstrom International Airport (P)(C)
- Within ½ hour of major university/college (P)(C)
- Competitive cost of labor (P)
- Availability of sites (P)
- Availability of tax-exempt financing for new industrial facilities (P)
- Availability of local incentives (P)
- Low cost of living (P)(C)
- Historical national job growth of 14.2% for past decade (P)(C)
- National average wage \$51,619 (C)
- 14,000 degrees and certificates granted in majors related to target (P)



Legend: Items appealing to needs of **prospects (P)** or **community (C)**.

There were just over 14,000 degrees or certificates granted in the 45-minute drive-time surrounding Lockhart related to *Food and Beverage Processing* as well as *Business Management*. Top awards are for *Business, Management, Marketing & Related* programs followed by *Engineering*. Additional areas of study in culinary programs and consumer sciences round out the talent pool graduating from area colleges and universities.

Table 7.5 Regional Degree Completions in Majors Related to Target, 2018

Area of Study	Certificates	Associate	Bachelor's	Master's +	Total
Business, Management, Marketing & Related	1,133	396	2,937	1,721	6,187
Engineering		66	1,430	629	2,125
Communication, Journalism & Related	5	42	1,842	134	2,023
Computer & Information Sciences & Support Services	268	209	780	231	1,488
Family & Consumer Sciences/Human Sciences	28	14	559	54	655
Mathematics & Statistics	20	27	358	49	454
Engineering Technologies & Related	126	90	137	53	406
Personal & Culinary Services	95	211	9		315
Precision Production	132	41			173
Mechanic & Repair Technologies/Technicians	48	40			88
Agriculture, Agriculture Operations & Related Sciences			86		86
Transportation & Materials Moving			3		3
Total	1,855	1,136	8,141	2,871	14,003

*Graduates from colleges & universities in a 45-minute drive-time from Lockhart are included.
Source: National Center for Education Statistics, Garner Economics*

Table 7.6 Target Employment, Change and Wages, United States, 2019

NAICS	Industry Description	2019 Jobs	10-Year Change	10-Year % Change	10-Year Forecast	10-Year % Forecast	Wages
3111	Animal Food Mfg.	64,514	12,209	23.3%	6,771	10.5%	\$62,403
3113	Confectionery Product Mfg.	77,696	8,908	13.0%	3,069	3.9%	\$52,381
3116	Animal Processing	529,464	32,737	6.6%	28,023	5.3%	\$42,598
3118	Bakeries & Tortilla Mfg.	333,438	43,820	15.1%	15,587	4.7%	\$39,446
31141	Frozen Food Mfg.	91,787	5,099	5.9%	-1,715	-1.9%	\$48,445
31142	Fruit & Vegetable Preservation	82,113	-6,703	-7.5%	-3,600	-4.4%	\$54,651
31191	Snack Food Mfg.	59,073	13,481	29.6%	2,519	4.3%	\$52,045
31193	Flavoring Syrup & Concentrate Mfg.	8,818	-799	-8.3%	-642	-7.3%	\$107,965
31194	Seasoning & Dressing Mfg.	43,548	11,221	34.7%	5,309	12.2%	\$65,062
31211	Soft Drink & Ice Mfg.	101,770	5,378	5.6%	-5,267	-5.2%	\$57,119
31212	Breweries	85,883	60,628	240.1%	27,139	31.6%	\$44,929
31213	Wineries	71,800	30,320	73.1%	8,884	12.4%	\$46,556
31214	Distilleries	17,655	10,404	143.5%	4,907	27.8%	\$63,658
4244	Grocery Wholesalers	810,656	74,005	10.0%	32,208	4.0%	\$60,516
4245	Farm Product Wholesalers	71,899	-5,340	-6.9%	-3,466	-4.8%	\$51,514
49312	Refrigerated Warehousing	65,754	17,160	35.3%	6,511	9.9%	\$51,854
49313	Farm Product Warehousing	11,311	2,494	28.3%	1,175	10.4%	\$48,285
Total/Weighted Average		2,527,181	315,023	14.2%	127,412	5.0%	\$51,619

Certain subsectors included in target matrix (Figure 7.1) have different naming than NAICS code subsector and the business activity falls under NAICS listed above. Source: EMSI, Garner Economics

The key, high-demand occupations for businesses within this *Food and Beverage Processing* target group include production, engineering, food preparation, management, and professional positions. Twelve occupations are classified as having a Bright Outlook by O*Net, indicating rapid growth or numerous job openings — or both — on a national level. Listed in the table below are the typical on-the-job training and education needed for entry, and the median wage rate for the metro.

Table 7.7 Key High-Demand Occupations for Target, Austin Metro, 2019

Occupation	2018 Metro Employment	Typical On-the-Job Training	Typical Education Needed	Annual Median Wage
General and Operations Managers ☀	21,520	None	Bachelor's	\$101,450
Cooks, Restaurant ☀	13,350	Moderate-term	None	\$27,350
Bookkeeping, Accounting & Auditing Clerks ☀	11,990	Moderate-term	Some college, no degree	\$42,280
Laborers, Freight, Stock & Material Movers, Hand ☀	11,440	Short-term	None	\$26,910
Maintenance and Repair Workers, General ☀	9,240	Moderate-term	High school	\$36,680
Heavy and Tractor-Trailer Truck Drivers ☀	8,120	Short-term	Postsecondary Certificate	\$40,080
Food Preparation Workers ☀	6,560	Short-term	Noel	\$27,640
Shipping, Receiving & Inventory Clerks	4,820	Short-term	High school	\$33,840
Light Truck Drivers ☀	4,420	Short-term	High school	\$41,820
Inspectors, Testers, Sorters, Samplers & Weighers	4,050	Moderate-term	High school	\$39,480
Training and Development Specialists ☀	2,970	None	Bachelor's	\$56,290
First-Line Supervisors of Production and Operating Workers	2,760	None	High school	\$61,940
Cooks, Institution & Cafeteria	2,620	Short-term	None	\$25,940
Cleaners of Vehicles & Equipment	2,550	Short-term	None	\$25,480
Heating, Air Conditioning & Refrigeration Mechanics and Installers ☀	2,460	Long-term	Postsecondary Certificate	\$42,500
Production, Planning & Expediting Clerks	2,150	Moderate-term	High school	\$42,300
Industrial Engineers ☀	1,780	None	Bachelor's	\$95,740
Machinists	1,740	Long-term	High school	\$47,690
Helpers—Production Workers ☀	1,670	Short-term	High school	\$29,060
Packers & Packagers, Hand	1,410	Short-term	None	\$27,260
Bakers	1,350	Long-term	None	\$27,460
Packaging & Filling Machine Operators & Tenders	9,40	Moderate-term	High school	\$26,080
Food Batchmakers	880	Moderate-term	High school	\$26,510
Butchers & Meat Cutters	580	Long-term	None	\$34,460
Food Processing Workers, All Other	150	Moderate-term	None	\$27,660

Source: U.S. Bureau of Labor, O*Net OnLine, Garner Economics

☀ — Bright Outlook (O*Net) noting occupations with rapid growth or numerous job openings nationally.

The table below shows similar occupations to this target’s in-demand jobs as matched by the O*Net crosswalk database. Several positions are included in Table 7.7 with some transferability already. For instance, there are a large number of food preparation workers that are not in the manufacturing environment. Their skills are easily utilized in many food processing applications. The table below includes more related and transferable occupations.

Table 7.8 Skills Transferability Key Target Occupations, 2019

Occupation	Compatible Occupations
Bakers	Cooks, Restaurant, Institutional, Short Order; Counter Attendants, Cafeteria, Food Concession, and Coffee Shop; Baristas; Food Batchmakers; Food Preparation Workers
Butchers & Meat Cutters	Cooks, Restaurant, Institutional, Short Order; Baristas; Bakers; Log Graders and Scalars; Weighers, Measurers, Checkers, and Samplers, Recordkeeping
Cleaners of Vehicles & Equipment	Pressers, Textile, Garment, and Related Materials; Dishwashers; Shoe and Leather Workers and Repairers; Laundry and Dry-Cleaning Workers; Slaughterers and Meat Packers; Maids and Housekeeping Cleaners; Graders and Sorters, Agricultural Products
Cooks, Institution & Cafeteria	Bartenders; Counter and Rental Clerks; Veterinary Assistants and Laboratory Animal Caretakers; Home Health Aides; Combined Food Preparation and Serving Workers, Including Fast Food; Personal Care Aides; Cashiers
Cooks, Restaurant ☀	Bakers; Bartenders; Baristas; Dietetic Technicians; Home Health Aides; Food Preparation Workers; Waiters and Waitresses
First-Line Supervisors of Production and Operating Workers	Supervisors of: Construction Trades and Extraction Workers; Animal Husbandry and Animal Care Workers; Landscaping, Lawn Service, and Groundskeeping Workers; Helpers, Laborers, and Material Movers; Housekeeping and Janitorial Workers; Transportation and Material-Moving Machine and Vehicle Operators
Food Batchmakers	Milling and Planing Machine Operators; Paper Goods Machine Operators; Textile Bleaching and Dyeing Machine Operators; Helpers—Production Workers; Team Assemblers; Laundry and Dry-Cleaning Workers; Textile Knitting and Weaving Machine Operators
Food Preparation Workers ☀	Food Servers, Nonrestaurant; Maids and Housekeeping Cleaners; Dining Room and Cafeteria Attendants; Packers and Packagers, Hand; Cashiers; Waiters and Waitresses; Laundry and Dry-Cleaning Workers
Food Processing Workers, All Other	Food Batchmakers; Food and Tobacco Roasting, Baking, and Drying Machine Operators ;Helpers—Production Workers; Textile Knitting and Weaving Machine Operators; Team Assemblers; Sewing Machine Operators; Laundry and Dry-Cleaning Workers
Heating, Air Conditioning & Refrigeration Mechanics and Installers ☀	Maintenance and Repair Workers, General; Control and Valve Installers and Repairers; Electronic Equipment Installers and Repairers, Motor Vehicles; Construction Carpenters; Commercial Divers; Geothermal Technicians; Weatherization Installers and Technicians
Industrial Engineers ☀	Industrial Engineering Technologists; Commercial and Industrial Designers; Mechanical Drafters; Logistics Analysts; Civil Engineering Technicians; Production, Planning, and Expediting Clerks; Electrical Drafters
Inspectors, Testers, Sorters, Samplers & Weighers	Electrical and Electronic Equipment Assemblers; Weighers, Measurers, Checkers, and Samplers, Recordkeeping; Team Assemblers; Log Graders and Scalars; Office Machine Operators; Mail Clerks and Mail Machine Operators; Milling and Planing Machine Operators; Etchers and Engravers
Packaging & Filling Machine Operators & Tenders	Pourers and Casters; Paper Goods Machine Operators; Textile Bleaching and Dyeing Machine Operators and Tenders; Milling and Planing Machine Operators; Textile Winding, Twisting, and Drawing Out Machine Operators; Coin, Vending, and Amusement Machine Servicers and Repairers ;Shoe Machine Operators and Tenders
Packers & Packagers, Hand	Dining Room and Cafeteria Attendants and Bartender Helpers; Order Fillers, Wholesale and Retail Sales; Maids and Housekeeping Cleaners; Food Servers, Nonrestaurant; Janitors and Cleaners; Graders and Sorters, Agricultural Products; Food Preparation Workers

Source: U.S. Bureau of Labor, O*Net OnLine, Garner Economics

☀ — Bright Outlook (O*Net) noting occupations with rapid growth or numerous job openings nationally.



TARGET: Logistics & Distribution

Whether companies master the “last-mile” distribution model or continue with a centralized, big-box template, demand certainly continues to rise for e-commerce. Colliers International expects supply chain resiliency efforts will lead to an **additional 750 million to a billion square feet** of industrial space in the United States alone. This move along with the ever-shortening delivery times is pushing the distribution sector to expand and innovate rapidly. Lockhart stands in an excellent position to capitalize on this target, with close proximities to I-10 (E/W) and I-35 (N/S).

The location on Highway 130 and proximity to Austin and San Antonio along with other major Texas metros make Lockhart a natural choice for a distribution center. The Austin-Bergstrom International Airport, just 25 minutes away, offers flexibility in shipment modes and speedy delivery.

Transportation & Warehousing employment was more than 600 strong in 2018 for Caldwell County, growing 11% over the past five years. This industry has a high LQ of 3.3, indicating that the sector is stronger compared to total employment against the national ratio. In general, an LQ above 1.2 is a good sign. Wholesale trade increased 9% for Caldwell County during the same period. The Austin Metro has more than 58,000 people employed in the *Transportation and Material Moving* occupational group.

The presence of large, flat industrial sites for building distribution centers is another positive asset for Lockhart. The more that can be done to ready these sites, the better the chances are to capture a distribution client in the time-sensitive e-commerce market. As always, *No product, No project™*.

Packaging & Labeling Services is included in this target to address those companies that support e-commerce in their ability to package, bundle, and manage labeling processes.

Target rationales include:

- Ideally located to serve major Texas metros (P)
- Centrally located for national market (P)
- Well positioned to serve international markets (P)
- Proximity to Austin-Bergstrom International Airport (P)(C)
- Within ½ hour of major university/college (P)(C)
- Competitive cost of labor (P)
- Availability of sites (P)
- Availability of tax-exempt financing for new industrial facilities (P)
- Availability of local incentives (P)
- Low cost of living (P)(C)
- Historical national job growth of 16.9% for past decade (P)(C)
- Forecasted national job growth of 7.9% for next decade (P) (C)
- National average wage \$69,763 (C)
- 10,887 degrees and certificates granted in majors related to target (P)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**.



There were 102,887 degrees or certificates granted in the 45-minute drive-time surrounding Lockhart related to logistics and distribution. *Business, Management, Marketing & Related* programs have the most degrees and *Engineering and Engineering Technologies* collectively produced 2,500 awards in 2018. *Communications Technologies, Computer, and Information Sciences* programs were also added to this list to support the need for the highly technical nature of logistics today.

Table 7.9 Regional Degree Completions in Majors Related to Target, 2018

Area of Study	Certificates	Associate	Bachelor's	Master's +	Total
Business, Management, Marketing & Related	1,133	396	2,937	1,721	6,187
Engineering		66	1,430	629	2,125
Computer, Information Sciences & Support Services	268	209	780	231	1,488
Mathematics & Statistics	20	27	358	49	454
Engineering Technologies & Related	126	90	137	53	406
Communications Technologies/Technicians & Support Services	24	73	39		136
Mechanic & Repair Technologies/Technicians	48	40			88
Transportation & Materials Moving			3		3
Total	1,624	901	5,683	2,863	10,887

Graduates from colleges & universities in a 45-minute drive-time from Lockhart are included.

Source: National Center for Education Statistics, Garner Economics

Table 7.10 Target Employment, Change and Wages, United States, 2019

NAICS	Industry Description	2019 Jobs	10-Year Change	10-Year % Change	10-Year Forecast	10-Year % Forecast	Wages
423	Wholesalers, Durable Goods	2,896,219	361,529	12.5%	56,820	1.7%	\$79,855
424	Wholesalers, Nondurable Goods	2,040,504	175,346	8.6%	48,384	2.2%	\$72,463
42511	Business to Business Electronic Markets	45,507	-12,759	-28.0%	23,105	70.6%	\$91,952
42512	Wholesale Trade Agents/Brokers	768,015	-254,625	-33.2%	-23,955	-4.7%	\$99,943
4541	Electronic Shopping & Mail-Order Houses	278,640	208,183	74.7%	215,898	44.3%	\$73,576
48411	Freight Trucking, Local	280,880	55,307	19.7%	29,565	8.8%	\$52,905
48412	Freight Trucking, Long-Distance	805,265	113,045	14.0%	52,633	5.7%	\$55,783
48422	Specialized Freight Trucking, Local	202,387	40,416	20.0%	17,910	7.4%	\$55,290
48423	Specialized Freight Trucking, Long-Distance	112,050	30,987	27.7%	16,506	11.5%	\$61,383
48851	Freight Transportation Arrangement	190,386	74,721	39.2%	29,383	11.1%	\$63,011
48899	Other Support Activities for Transportation	27,221	9,800	36.0%	1,851	5.0%	\$48,917
49311	General Warehousing & Storage	537,035	548,382	102.1%	250,308	23.1%	\$42,350
49319	Other Warehousing & Storage	44,633	7,230	16.2%	5,231	10.1%	\$55,050
541614	Process, Physical Distribution & Logistics Consulting Services	103,970	45,852	44.1%	37,846	25.3%	\$75,769
561910	Packaging & Labeling Services	52,395	9,528	18.2%	7,848	12.7%	\$44,842
	Total/Weighted Average	8,385,107	1,412,943	16.9%	769,333	7.9%	\$69,763

Certain subsectors included in target matrix (Figure 7.1) have different naming than NAICS code subsector and the business activity falls under NAICS listed above. Source: EMSI, Garner Economics

High-demand occupations for the logistics and distribution target family focus on warehouse operations, computer technology, and order fulfillment-type work along with professional and managerial positions. Occupations classified as having a Bright Outlook by O*Net indicating rapid growth or numerous job openings — or both — on a national level are marked with a yellow sun graphic. Listed in the table below are the typical on-the-job training and education needed for entry, and the median wage rate for the metro.

Table 7.11 Key High-Demand Occupations for Target, Austin Metro, 2019

Occupation	2018 Employment	Typical On-the-Job Training	Typical Education Needed	Annual Median Wage
General and Operations Managers ☀	21,520	None	Bachelor's	\$101,450
Project Management Specialists & Business Operations Specialists	14,310	None	Bachelor's	\$75,330
Bookkeeping, Accounting & Auditing Clerks ☀	11,990	Moderate-term	Some college, no degree	\$42,280
Laborers, Freight, Stock & Material Movers, Hand ☀	11,440	Short-term	None	\$26,910
Stockers and Order Fillers	10,810	Short-term	High school	\$29,010
Maintenance and Repair Workers, General ☀	9,240	Moderate-term	High school	\$36,680
Heavy and Tractor-Trailer Truck Drivers ☀	8,120	Short-term	Postsecondary Certificate	\$40,080
Network and Computer Systems Administrators	5,580	None	Bachelor's	\$81,380
Shipping, Receiving & Inventory Clerks	4,820	Short-term	High school	\$33,840
Light Truck Drivers ☀	4,420	Short-term	High school	\$41,820
Industrial Truck & Tractor Operators	4,070	Short-term	None	\$31,750
Inspectors, Testers, Sorters, Samplers & Weighers	4,050	Moderate-term	High school	\$39,480
Computer Programmers	3,290	None	Bachelor's	\$87,990
Training and Development Specialists ☀	2,970	None	Bachelor's	\$56,290
Cleaners of Vehicles & Equipment	2,550	Short-term	None	\$25,480
Heating, Air Conditioning & Refrigeration Mechanics and Installers ☀	2,460	Long-term	Postsecondary Certificate	\$42,500
Production, Planning & Expediting Clerks	2,150	Moderate-term	High school	\$42,300
Industrial Engineers ☀	1,780	None	Bachelor's	\$95,740
Machinists	1,740	Long-term	High school	\$47,690
Helpers—Production Workers ☀	1,670	Short-term	High school	\$29,060
Packers & Packagers, Hand	1,410	Short-term	None	\$27,260
Logisticians	1,290	None	Bachelor's	\$68,730
Packaging & Filling Machine Operators & Tenders	9,40	Moderate-term	High school	\$26,080
Transportation, Storage, and Distribution Managers	740	None	High school	\$82,170
Cargo and Freight Agents ☀	520	Short-term	High school	\$44,200

Source: U.S. Bureau of Labor, O*Net OnLine, Garner Economics

☀ — Bright Outlook (O*Net) noting occupations with rapid growth or numerous job openings nationally.

The need for talent at larger e-commerce and distribution centers has grown exponentially in recent years, especially during the COVID-19 pandemic where online ordering activity has surged. Focusing on transferable skills for in-demand occupations using O*Net’s transferability crosswalk provides a basis for expanding the recruitment net and being able to show available labor force.

Table 7.12 Skills Transferability Key Target Occupations, 2019

Occupation	Compatible Occupations
Cargo and Freight Agents ☀	Order Clerks; Dispatchers, Except Police, Fire, and Ambulance; Hotel, Motel, and Resort Desk Clerks; Payroll and Timekeeping Clerks; Correspondence Clerks; Concierges; Title Examiners, Abstractors, and Searchers
General and Operations Managers ☀	Postmasters; Logistics Managers; Transportation Managers; Purchasing Agents; Property, Real Estate and Community Association Managers; Supervisors of Office and Administrative Support Workers; IT Project Managers
Heavy and Tractor-Trailer Truck Drivers ☀	Light Truck or Delivery Services Drivers; Septic Tank Servicers and Sewer Pipe Cleaners; Subway and Streetcar Operators; Helpers—Extraction Workers; Tank Car, Truck, and Ship Loaders; Taxi Drivers and Chauffeurs; Excavating and Loading Machine Operators
Industrial Truck & Tractor Operators	Laborers and Freight, Stock, and Material Movers, Hand; Helpers—Production Workers; Agricultural Equipment Operators; Pourers and Casters, Metal; Farmworkers and Laborers, Crop; Sawing Machine Operators; Machine Feeders and Offbearers
Inspectors, Testers, Sorters, Samplers & Weighers	Electrical and Electronic Equipment Assemblers; Weighers, Measurers, Checkers, and Samplers, Recordkeeping; Team Assemblers; Log Graders and Scalers; Office Machine Operators; Mail Clerks and Mail Machine Operators; Milling and Planing Machine Operators; Etchers and Engravers
Laborers, Freight, Stock & Material Movers, Hand ☀	Team Assemblers; Helpers—Production Workers; Sawing Machine Operators; Nursery Workers; Farmworkers and Laborers; Couriers and Messengers; Parking Lot Attendants; Grinding and Polishing Workers
Light Truck Drivers ☀	Couriers and Messengers; Parking Lot Attendants; Taxi Drivers and Chauffeurs; Meter Readers, Utilities; Refuse and Recyclable Material Collectors; Laborers and Freight, Stock, and Material Movers, Hand; Bus Drivers, School or Special Client
Logisticians	Risk Management Specialists; Supervisors of Non-Retail Sales Workers; Purchasing Agents; Compensation, Benefits, and Job Analysis Specialists; Advertising and Promotions Managers; Auditors; Sales Agents for Securities and Commodities
Packaging & Filling Machine Operators & Tenders	Pourers and Casters; Paper Goods Machine Operators; Textile Bleaching and Dyeing Machine Operators and Tenders; Milling and Planing Machine Operators; Textile Winding, Twisting, and Drawing Out Machine Operators; Coin, Vending, and Amusement Machine Servicers and Repairers ;Shoe Machine Operators and Tenders
Packers & Packagers, Hand	Dining Room and Cafeteria Attendants and Bartender Helpers; Order Fillers, Wholesale and Retail Sales; Maids and Housekeeping Cleaners; Food Servers, Nonrestaurant; Janitors and Cleaners; Graders and Sorters, Agricultural Products; Food Preparation Workers
Production, Planning & Expediting Clerks	Order Clerks; Procurement Clerks; Tellers; Hotel, Motel, and Resort Desk Clerks; Bill and Account Collectors; First-Line Supervisors of Personal Service Workers; Office Clerks, General
Project Management Specialists & Business Operations Specialists	Risk Management Specialists; Compliance Managers; Supervisors of Non-Retail Sales Workers; Purchasing Agents; Logistics Analysts; Supervisors of Office and Administrative Support Workers; Program Directors
Shipping, Receiving & Inventory Clerks	Mail Clerks; Nonfarm Animal Caretakers; Counter and Rental Clerks; Weighers, Measurers, Checkers, and Samplers, Recordkeeping; Cashiers; Baggage Porters and Bellhops; Security Guards
Stockers and Order Fillers	Helpers—Production Workers; Sawing Machine Operators; Nursery Workers; Farmworkers and Laborers; Couriers and Messengers; Parking Lot Attendants; Tire Repairers and Changers
Transportation, Storage, and Distribution Managers	Security Managers; Buyers and Purchasing Agents; Postmasters; Lodging Managers; Loss Prevention Managers; Supply Chain Managers; Meeting and Event Planners

Source: U.S. Bureau of Labor, O*Net OnLine, Garner Economics

☀ — Bright Outlook (O*Net) noting occupations with rapid growth or numerous job openings nationally.



TARGET: Pharmaceutical,
Medical Supplies & Medical
Device Mfg.

Since beginning this project in early 2020, there have been major changes in the economy due to the COVID-2019 pandemic. During the writing of this report, there is some uncertainty about the total impact of the pandemic as a vaccine is still in development. What is known is that the supply chain will be significantly reshaped, especially in medical equipment and supplies, pharma, and consumer products. International demand will rise and accelerate the move to regionalize supply chains. Efforts are ongoing for supply chain security legislation.

The year 2020 will be noted for its “Great Pivot” when many manufacturers shifted from normal operations and products to make much needed personal protection equipment (PPE) for healthcare professionals and the general populace. The need for these products will continue and so will the manufacturing and distribution. This opens the door to medical equipment makers expanding and firms finding a new product line as a result of the pandemic.

The notion of a pharma usually conjures up images of research and development activity. For this target, it is recommended that the manufacturing operations be the aim and not R&D. *Pharmaceutical Manufacturing* is akin to the *Food Processing* industry in many ways, including the skill sets and talent needed. Contract manufacturers make, in-bulk, medicines for a variety of clients. It is also similar in that many operations are large water users that can benefit from Lockhart’s water service capacity.

Target rationales include:

- Availability of water/wastewater treatment capacity (P)
- Centrally located for major regional & national market (P)
- Well positioned to serve international markets (P)
- Proximity to Austin-Bergstrom International Airport (P)(C)
- Within ½ hour of major university/college (P)(C)
- Competitive cost of labor (P)
- Availability of sites (P)
- Availability of tax-exempt financing for new industrial facilities (P)
- Availability of local incentives (P)
- Low cost of living (P)(C)
- Historical national job growth of 11.7% for past decade (P)(C)
- Forecasted national job growth of 7.5% for next decade (P) (C)
- National average wage \$97,776 (C)
- 18,086 degrees and certificates granted in majors related to target (P)

Legend: Items appealing to needs of **prospects (P)** or **community (C)**.



There were slightly more than 18,000 degrees or certificates granted in the 45-minute drive-time surrounding Lockhart related to this target family. Because of the nature of *Pharmaceutical Manufacturing*, the focus is on production and not on research and development operations. *Health Professions and Related* are included due to the supportive function some medical educational tracks may offer this target; however it is realistic to assume that a good portion of these 3,000 graduates will be looking for traditional health professions.

Table 7.13 Regional Degree Completions in Majors Related to Target, 2018

Area of Study	Certificates	Associate	Bachelor's	Master's +	Total
Business, Management, Marketing & Related	1,133	396	2,937	1,721	6,187
Health Professions & Related	999	530	880	672	3,081
Engineering		66	1,430	629	2,125
Communication, Journalism & Related	5	42	1,842	134	2,023
Biological & Biomedical Sciences		43	1,425	108	1,576
Computer & Information Sciences & Support Services	268	209	780	231	1,488
Family & Consumer Sciences/Human Sciences	28	14	559	54	655
Mathematics & Statistics	20	27	358	49	454
Engineering Technologies & Related	126	90	137	53	406
Mechanic & Repair Technologies/Technicians	48	40			88
Transportation & Materials Moving			3		3
Total	2,627	1,457	10,351	3,651	18,086

*Graduates from colleges & universities in a 45-minute drive-time from Lockhart are included.
Source: National Center for Education Statistics, Garner Economics*

Table 7.14 Target Employment, Change and Wages, United States, 2019

NAICS	Industry Description	2019 Jobs	10-Year Change	10-Year % Change	10-Year Forecast	10-Year % Forecast	Wages
423450	Medical, Dental, Hospital Equipment & Supplies Wholesalers	254,929	65,330	34.5%	37,607	14.8%	\$110,543
3256	Soap, Cleaning Compound & Toilet Preparation Mfg.	113,465	9,825	9.5%	6,738	5.9%	\$74,985
3391	Medical Equipment & Supplies Mfg.	331,405	14,147	4.5%	17,217	5.2%	\$77,080
3254	Pharmaceutical & Medicine Mfg.	305,415	19,375	6.8%	14,688	4.8%	\$118,561
333314	Optical Instrument & Lens Mfg.	20,841	-1,476	-6.6%	433	2.1%	\$90,218
	Total/Weighted Average	1,026,054	107,201	11.7%	76,682	7.5%	\$97,776

Certain subsectors included in target matrix (Figure 7.1) have different naming than NAICS code subsector and the business activity falls under NAICS listed above. Source: EMSI, Garner Economics

High-demand occupations for this target family focus on the production of pharmaceutical, medical, health, and personal protective equipment. Some positions listed below are included due to the similar nature of skills and functions — such as the food batchmakers, which were included in the absence of an available mixing operator for the region. Occupations classified as having a Bright Outlook by O*Net indicating rapid growth or numerous job openings — or both — on a national level are marked with a yellow sun graphic. Listed in the table below are the typical on-the-job training and education needed for entry and the median wage rate for the metro.

Table 7.15 Key High-Demand Occupations for Target, Austin Metro, 2019

Occupation	2018 Employment	Typical On-the-Job Training	Typical Education Needed	Annual Median Wage
General and Operations Managers ☀	21,520	None	Bachelor's	\$101,450
Bookkeeping, Accounting & Auditing Clerks ☀	11,990	Moderate-term	Some college, no degree	\$42,280
Laborers, Freight, Stock & Material Movers, Hand ☀	11,440	Short-term	None	\$26,910
Maintenance and Repair Workers, General ☀	9,240	Moderate-term	High school	\$36,680
Heavy and Tractor-Trailer Truck Drivers ☀	8,120	Short-term	Postsecondary Certificate	\$40,080
Shipping, Receiving & Inventory Clerks	4,820	Short-term	High school	\$33,840
Light Truck Drivers ☀	4,420	Short-term	High school	\$41,820
Inspectors, Testers, Sorters, Samplers & Weighers	4,050	Moderate-term	High school	\$39,480
Training and Development Specialists ☀	2,970	None	Bachelor's	\$56,290
First-Line Supervisors of Production and Operating Workers	2,760	None	High school	\$61,940
Cleaners of Vehicles & Equipment	2,550	Short-term	None	\$25,480
Heating, Air Conditioning & Refrigeration Mechanics and Installers ☀	2,460	Long-term	Postsecondary Certificate	\$42,500
Production, Planning & Expediting Clerks	2,150	Moderate-term	High school	\$42,300
Compliance Officers	2,020	Moderate-term	Bachelor's	\$59,960
Industrial Engineers ☀	1,780	None	Bachelor's	\$95,740
Machinists	1,740	Long-term	High school	\$47,690
Helpers—Production Workers ☀	1,670	Short-term	High school	\$29,060
Food Batchmakers	880	Moderate-term	High school	\$26,510
Chemical Technicians	480	Moderate-term	Associate	\$47,000
Chemists	450	None	Bachelor's	\$60,320
Biological Technicians ☀	440	None	Bachelor's	\$40,420
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	400	Moderate-term	High school	\$55,070
Medical Equipment Repairers	350	Moderate-term	Associate	\$43,850
Chemical Equipment Operators and Tenders	220	Moderate-term	High school	\$40,610
Medical Appliance Technicians ☀	210	Moderate-term	High school	\$40,150
Packaging & Filling Machine Operators & Tenders	940	Moderate-term	High school	\$26,080

Source: U.S. Bureau of Labor, O*Net OnLine, Garner Economics

☀ — Bright Outlook (O*Net) noting occupations with rapid growth or numerous job openings nationally.

The table below includes occupations with similar skills to the in-demand occupations listing in Table 7.15 for this target family. Transferable occupations are matched based on skills in the O*Net crosswalk.

Table 7.16 Skills Transferability Key Target Occupations, 2019

Occupation	Compatible Occupations
Biological Technicians ☀	Geological Sample Test Technicians; Food Science Technicians; Inspectors, Testers, Sorters, Samplers, and Weighers; Veterinary Technologists and Technicians; Ophthalmic Medical Technologists; Photographic Process Workers; Weighers, Measurers, Checkers, and Samplers, Recordkeeping
Chemical Equipment Operators and Tenders	Forging Machine Operators; Plating and Coating Machine Operators; Stationary Engineers and Boiler Operators; Glass Blowers, Molders, Benders, and Finishers; Heat Treating Equipment Operators; Extruding and Forming Machine Operators; Patternmakers; Engine and Other Machine Assemblers
Chemical Technicians	Printing Press Operators; Photographic Process Workers and Processing Machine Operators; Geological Sample Test Technicians; Biological Technicians; Inspectors, Testers, Sorters, Samplers, and Weighers; Furniture Finishers
Chemists	Chemical Technicians; Quality Control Analysts; Medical and Clinical Laboratory Technologists; Environmental Engineering Technicians; Industrial Engineering Technicians; Microbiologists; Geological Sample Test Technicians
Cleaners of Vehicles & Equipment	Pressers, Textile, Garment, and Related Materials; Dishwashers; Shoe and Leather Workers and Repairers; Laundry and Dry-Cleaning Workers; Slaughterers and Meat Packers; Maids and Housekeeping Cleaners; Graders and Sorters, Agricultural Products
Compliance Officers	Compensation, Benefits, and Job Analysis Specialists; Claims Examiners, Property and Casualty Insurance; Loan Counselors; Private Detectives; Eligibility Interviewers; Credit Counselors; Human Resource Assistants
Food Batchmakers	Milling and Planing Machine Operators; Paper Goods Machine Operators; Textile Bleaching and Dyeing Machine Operators; Helpers--Production Workers; Team Assemblers; Laundry and Dry-Cleaning Workers; Textile Knitting and Weaving Machine Operators
Heating, Air Conditioning & Refrigeration Mechanics and Installers ☀	Maintenance and Repair Workers, General; Control and Valve Installers and Repairers; Electronic Equipment Installers and Repairers, Motor Vehicles; Construction Carpenters; Commercial Divers; Geothermal Technicians; Weatherization Installers and Technicians
Inspectors, Testers, Sorters, Samplers & Weighers	Electrical and Electronic Equipment Assemblers; Weighers, Measurers, Checkers, and Samplers, Recordkeeping; Team Assemblers; Log Graders and Scalars; Office Machine Operators; Mail Clerks and Mail Machine Operators; Milling and Planing Machine Operators; Etchers and Engravers
Medical Appliance Technicians ☀	Glass Blowers, Molders, Benders, and Finishers; Aircraft Structure, Surfaces, Rigging, and Systems Assemblers; Photographic Process Workers and Processing Machine Operators; Forging Machine Operators; Weatherization Installers and Technicians; Control and Valve Installers and Repairers; Home Appliance Repairers
Medical Equipment Repairers	Medical Appliance Technicians; Control and Valve Installers and Repairers; Electronic Equipment Installers and Repairers; Home Appliance Repairers; Motorcycle Mechanics; Small Engine Mechanics; Broadcast Technicians
Packaging & Filling Machine Operators & Tenders	Pourers and Casters; Paper Goods Machine Operators; Textile Bleaching and Dyeing Machine Operators and Tenders; Milling and Planing Machine Operators; Textile Winding, Twisting, and Drawing Out Machine Operators; Coin, Vending, and Amusement Machine Servicers and Repairers ;Shoe Machine Operators and Tenders
Production, Planning & Expediting Clerks	Order Clerks; Procurement Clerks; Tellers; Hotel, Motel, and Resort Desk Clerks; Bill and Account Collectors; First-Line Supervisors of Personal Service Workers; Office Clerks, General
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	Crushing, Grinding, and Polishing Machine Operators; Cooling and Freezing Equipment Operators; Biomass Plant Technicians; Adhesive Bonding Machine Operators and Tenders; Heat Treating Equipment Operators; Metal-Refining Furnace Operators; Extruding and Forming Machine Operators

Source: U.S. Bureau of Labor, O*Net OnLine, Garner Economics

☀ — Bright Outlook (O*Net) noting occupations with rapid growth or numerous job openings nationally.

Chapter 8: Recommendations to Achieve Success

To ensure that the City of Lockhart and its EDC can meet its full potential, leverage its assets, and strengthen its business climate to retain current companies and attract the recommended business targets, the City and its many partners must be proactive in driving Lockhart’s economic future and setting it apart from other peer jurisdictions.

The following observations, conclusions, and recommendations are based on data and feedback collected during Phase 1. They also build upon the assessments made to prioritize the business targets identified in Chapter 7. Finally, some of the recommendations validate and support the City’s goals in its most recent 2020/2021 Strategic Priorities document.

As noted in the introductory chapters, this assessment — and the observations herein — were developed from a site selector’s perspective. The recommendations are built with an eye toward those areas that will differentiate Lockhart. The goal of this TIS is to provide a framework for the community to consider its economic development service delivery and activities to support and augment Lockhart’s work to recruit companies and the work of other City, County, and regional entities engaged in economic development. The recommendations look at Lockhart as a whole but are limited to the successful execution of the targets, since this is not a comprehensive economic development strategic plan.

Recommendations for action are categorized under two areas of opportunity: Asset Development (Product Improvement) and Communicate the Brand (Marketing). In some instances, and where relevant and possible, a cost estimate to implement the noted recommendation has been offered. An estimated timeline for the optimal application of the recommendations is also included.

Figure 8.1: Recommendation Categories

Asset Development/Execute Effectively	Communicate the Brand
What Lockhart needs to do to have the assets and infrastructure in place that will allow the City to compete globally in the attraction and retention of business and implement effectively.	Marketing: Tell the Lockhart Story globally to attract both talent and investment.

Asset Development/Execute Effectively



1

Develop your sites and buildings inventory: “No product, No project”™ is the trademarked mantra of Garner Economics and our work as location advisors engaged to facilitate location decisions on behalf of corporate clients. Lockhart lacks shovel-ready sites, with few sites of 20 acres or more. A shovel-ready site is one defined as a site under control by a single entity, with all of the necessary infrastructure to the site (e.g., water, sewer, electric, gas, broadband). The EDC has identified sites in its inventory, such as those named Centerpoint and Silent Valley, but these sites are classified as raw land in the vernacular of location advisors. Industrial-sized infrastructure does not exist at these sites, yet. Lockhart Industrial Park I and II have limited-sized sites and these parks are mostly built out. This limited inventory of available sites and quality buildings suitable for the targeted industries will cause Lockhart to be passed over on projects that need options on available, quality sites with the necessary infrastructure in place and under control (for sale or under option).

The EDC should consider acquiring a site of 100 acres or more to develop its next publicly held industrial park. The EDC should also consider developing a 50,000 sq. ft. industrial shell/spec building, expandable to 100,000 sq. ft. to accommodate the typical space demands of the targeted business sectors. Initially and until Lockhart has the space to accommodate this size building, the spec building should be developed as a “virtual” spec building, with all of the drawings and rough design to accommodate speed to market as demand determines. We recommend that the EDC engage a real estate market analysis firm to identify the best location for Lockhart’s next industrial park, based on geographic and infrastructure costs considerations. Additionally, since Lockhart is designated as a Type B community by the Texas comptroller, the City should designate funds as part of its bonded indebtedness to acquire and develop a site for a future industrial park based on the market analysis. This recommendation incorporates a City 2020/2021 Strategic Priorities.

Cost: For advisory firm \$15K+/- . Cost to develop a virtual spec building, \$10–15K+/-.

Next steps: Engage a real estate market analysis firm or engineering firm to analyze the viability of sites and the costs associated with acquisition and development. Create a debt service plan based on the site pro forma.

Timeline: 2021



2

Create a culture of “yes” within the City’s permitting and regulatory process: Lockhart business survey respondents were asked to list up to three obstacles or challenges they see in the City’s ability to attract, expand, or retain business and investments. The most-noted sentiments included frustration with regulations, processes, and costs of doing business in the City; the lack of housing options; and the lack of a plan to accommodate or enhance growth. The lack of available space or sites, the lack of an educated or motivated workforce, and a perception of an anti-growth sentiment within the community were also noted.

A municipality’s business climate is considered one of the most important considerations a potential business will evaluate when considering an investment. Business climate is defined as “those policies and laws enacted by the local governments, that impact businesses in Lockhart (either positively or negatively).” Survey respondents provided a score for Lockhart of 3.26 on a 5.0 scale, and average is considered 3.0. The City’s permitting process received the vast majority of negative comments (page 6). Participants stated the process is difficult, the rules are unclear, and the interpretations are unpredictable. Whether this is real or perceived, it is in the City’s best address to address this. If it is perceived, then the City needs to do a better job of communicating the process and the realities of Lockhart’s regulatory system. If it is real, then the City needs to do a deep dive into the process by an outside planning firm and focus on recommendations for continuous process improvement (CPI).

The permitting process can be an intimidating task for any business applicant. Many times, municipal planners and inspections personnel are construed as regulators with a culture of “no.” Not to lessen the role that government needs to play to protect the character of a municipality, it also needs to instill in its employees a culture of “yes” to spur private investment and to enhance the economic vitality of Lockhart. This regulatory introspection is needed to determine what is real and what is perceived. Providing quality customer service is a goal of the City’s 2020/2021 Strategic Priorities.

Timeline: 2022

Process: Regulatory introspection of the City’s planning, zoning and inspection process.



3

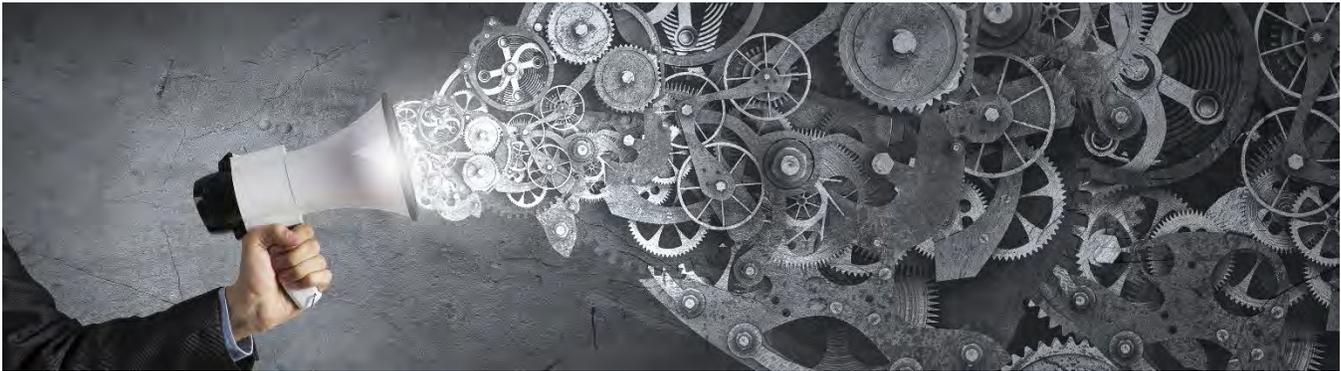
Develop and sustain a coordinated effort for workforce training: Lockhart’s business climate survey respondents were consistent in their concerns about the local workforce. They offered a small local labor pool and a lack of available skilled labor as the two most frequent responses related to the area’s workforce. In addition to the options provided, respondents noted that there is a lack of “good” jobs currently available, and the area lacks workforce training

coordination.

Austin Community College (ACC) has a training program at the Lockhart Correctional Facility. However, there is no vocational or community college delivery in Lockhart for the general population. *Talent is the new currency™*, and having a workforce that meets the needs and demands of your local employers allows for business retention, expansion, and new investment. With the City’s population of nearly 14,000 people and the County’s population of over 43,000, the City and County may be too small for a stand-alone, designated training center, offered by ACC or by Texas State Community College (TSTC). We recommend that the City and the Lockhart ISD explore a joint venture to offer postsecondary vocational training in skills that have the most demand, at an ISD facility, either in partnership with ACC or TSTC.

Timeline: 2021

Communicate the Brand



1

Conduct an external outreach to companies and consultants: It's expensive to market a community domestically or globally. As such, we use the saying, *Market regionally, Sell locally*. The EDC should call on location advisors and companies where there are the highest concentration of advisors and companies, as identified in the TIS. The cluster of location advisors includes Atlanta, Chicago, Dallas/Fort Worth, and the New York/New Jersey metro. This should be done in partnership with the City's relationship with the San Marcos Partnership, Opportunity Austin (which is the Austin Chamber of Commerce) and Caldwell County.

Cost: \$15K annually.

Timeline: 2021–2025

2

Create a lead-generation program: To jump-start the EDC's ability to fully utilize the business sector targets and subsector targets identified in Chapter 3, the EDC should engage a marketing firm, separate from the work of the City and the EDC, to provide lead-generation services that identify qualified investment opportunities. This should be done separately from the EDC's participation with the San Marcos Partnership or Opportunity Austin. Lockhart will need to be as proactive as possible in controlling its own destiny. This service should yield a list of companies (including the company's current location, contact information for the C-level executive responsible for choosing future operation sites, business description [NAICS code, etc.], and magnitude of recent growth) that would be hot prospects for the EDC's recruitment efforts. If done correctly, the lead-generation identification process is methodical and evaluates key company performance metrics including sales, employment, growth, number of locations, and other relevant factors. The process tracks and evaluates "events" undertaken by companies in the identified target business sectors that indicate expansion or consolidation. This type of lead generation marketing is in conjunction with the work of the EDC. The specialty of lead generation efforts is typically one that should not be done by an EDC independently or in house. The work is scientific, tedious and laborious. Thus, both large and small EDC's engage these types of firms for specific lead generations services. This work should not be completed until after the City's site and building product is better defined and developed as noted in recommendation one above.

Cost: \$25–40K.

Timeline: Once the appropriate product is fully developed.

Chapter 9: Call to Action

To be successful in executing the TIS, Lockhart will need to leverage its unique mix of assets to strengthen the area’s product and market its value proposition to the targets. While Lockhart has a strong base to build from, the area must be more proactive in building the assets and infrastructure needed to attract higher-quality targets and companies. As noted in the A&C, there are several areas where improvement would better set Lockhart apart from peer communities. To be successful, the City and EDC need to focus its targeted industry efforts and find more resources to devote to building economic development product (sites and buildings).

Through this TIS, the City and the community’s leaders can make long-term investments to ensure that Lockhart can attract the types of activity it wants. By taking a proactive leadership position, the City can work to help transform Lockhart into a place that attracts quality talent and companies while maintaining its character. To create such change, the EDC and the entire community will need to be more proactive and champion for long-term investments that will serve both existing and new companies.

Acknowledgments

Garner Economics would like to thank the City of Lockhart and its economic development director, Mike Kamerlander, and the City’s city manager, Steve Lewis, along with City leadership for their help and assistance during this process. Their compilation of data and information, as well as their openness and willingness to explore various opportunities to strengthen operations, have contributed to the richness and rigor of this report.

Garner Economics

We are data-driven strategists helping companies, communities, and organizations — large and small, urban and rural — achieve success.

We offer site-location advisory services, analytical research, industry targeting, strategic action planning, and workforce solutions with a wealth of expertise to companies, communities, and organizations globally. We are based in Atlanta, Georgia, with offices also in North Carolina.

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Appendix A

Detailed Survey Response Summary

Garner Economics conducted an electronic survey of local stakeholders. The survey was in the field April 13–30, 2020, and was completed by 31 respondents.

Of the 31 respondents, 18 live in Lockhart, 24 work in Lockhart, and 15 both live and work in Lockhart.

1. What are several words or phrases that describe Lockhart? (Select up to three responses.)

Response Option	# Rec'd
Growing	28
Unique	8
Historical	23
Collaborative/Community Spirit	11
Commuter Community	9
Other	4

“Other” responses included:

- Stuck
- Identity crisis
- Friendly
- Negative

2. What are some of the biggest obstacles that inhibit Lockhart in its ability to attract, expand, or retain businesses and investment? (Provide up to three responses.)

The responses for this question were open-ended. The table below reflects sentiments that were shared by more than one respondent.

Responses from more than one respondent	# Rec'd
Lack of housing inventory	9
Regulations and higher tax rates	9
No plan/lack of support for economic development	8
Lack of available space or shovel-ready sites	6
Lack of an educated and motivated workforce	6
Anti-growth sentiments	6
Weak or lacking infrastructure	5
Challenges to the Downtown Square	5
Lack of family-friendly amenities	4
High rents/price of real estate	4
Lack of retail and low support for local	3

Unique responses (i.e., sentiments shared by one respondent and not shared by other respondents) are reproduced below.

- Drugs
- Funding is the biggest issue
- Local commercial/industrial support
- Regional economy
- A great many of the newer residents live in apartments and commute to Austin and San Marcos for employment
- Lack of welcome

Obstacles, continued

- Not on route to major cities (i.e., Hwy 71 on way to Houston)
- Older Lockhart leadership working well with new businesses
- Primarily (and rightfully so) known for its BBQ
- No hotel rooms
- Lack of hospitals
- Lack of higher education
- Lack of funding and support for K–12 educational quality and capacity
- Consistency
- Lack of awareness for prospective entrepreneurs moving/establishing companies in the region
- Transportation facilities
- Noisy traffic
- Reaching the masses!
- Lower income families

3. We define business climate as those policies and laws enacted by the local governments, that impact businesses in Lockhart (either positively or negatively). On a scale of 1 to 5, with 5 being best, how would you rate the business climate of the City? Caldwell County?

Response Option	# Rec'd
City of Lockhart	
1 - Worst	1
2 - Poor	6
3 - Average	9
4 - Good	14
5 - Best	1
Caldwell County	
1 - Worst	0
2 - Poor	4
3 - Average	14
4 - Good	11
5 - Best	1

After ranking the two, some respondents provided additional comments:

- To be the best, we need to explore all methods of attracting and incentivizing business to locate in Caldwell County and Lockhart.
- The business climate is good, but too many people are chasing after the same dollars, and a few businesses are doing well while others are foundering to pay overhead.
- This is actually hard and probably unfair because much of what I see is less governance, though it plays a part, as much as the social welcoming, the business energy, the vitality.

4. What do you see as the City's strengths? (Select up to three responses.)

Response Option	# Rec'd
Location/proximity to other Texas cities	28
Proximity to the Austin Airport	19
Growth and capacity for continued growth	15
Lower cost of doing business	14
Collaborative/community spirit	11

A few respondents also left further comments on Lockhart's strengths:

- I also think we have capacity for continued growth and a collaborative community spirit.
- We have utility infrastructure and space to grow, but don't have adequate facilities for educational and industrial growth.
- The location of Lockhart is IDEAL, provided there is distribution of products produced here being sent out.

Strengths, continued

- What Lockhart sees of itself (unique, not Austin, community-driven) is very different than the lay of the land. Lockhart must reconcile this identity crisis with facts. The biggest benefits to Lockhart from a business sense have so much to do with the proximity to other metros: cost, opportunity, infrastructure. By denying that we are missing the mark on what we are.
- I would add emerging arts culture and overall quality of life.

5. How would you describe the current labor situation in the area in terms of BOTH quality AND availability? (Select up to three responses.)

Response Option	# Rec'd
Small local labor pool	19
Lack of available skilled labor	18
Lack of workforce training options	11
No or limited difficulty in finding talent	10
Good or excellent local workforce	4
Other	4

“Other” responses included:

- Not many GOOD jobs available here presently
- Potential in untapped skills in local labor force
- No coordination

Further comments related to labor in Lockhart include:

- We have, within 30 miles of Lockhart, a talent pool of several million people who can all support business in Lockhart.
- I've heard from businesses over and over that it is difficult to hire and retain local workers. But that might be partly because of the tight labor market before the latest crisis. I believe we lack the data to assess the skills of the pool of available local labor (majority of whom may be commuters).
- Many skilled workers travel to Austin.
- A large labor pool, but it lacks the discipline for consistent employment.
- In my business I have to recruit from out of town. To do so, I've got to pay higher wages!
- Due to the nature of my business, I hire people that are licensed in my industry. I find it hard to find local labor to fit the job description. People that live in Austin that are licensed are not willing to travel to Lockhart as there are plenty of jobs available that are more local for them.
- Lockhart is a GREAT place to live, but there is a SEVERE lack of professional jobs. Lockhart desperately needs a medical facility similar to Seton in Luling. Lockhart desperately needs a modern community center that could host very large crowds when necessary so that the local groups can bring in events with medium to large crowds. Lockhart needs to be able to attract jobs with higher-paying salaries.
- The work ethic in the community is questionable. My best example: contract workers of all trades. They steal. They do not show up. They do so without contracts and pretend this is a “handshake” deal type of old Christian town: the reality versus the narrative are very different. It is very competitive and underhanded here, at many levels. And people often do not follow through.
- I feel there is a lot of local talent that currently have jobs in Austin or surrounding areas, some of whom are recent transplants, but they are making Austin wages, so a local business has to be prepared to compete with that.
- Our company has been able to recruit top talent nationally due to (i) the community itself and (ii) Lockhart's proximity to larger nearby cities. Some staff live locally, and I believe many more may choose to do so in the future as the City grows and has more draws to prospective inhabitants such as restaurants, family activities, and strong school system.
- No day labor availability.

6. For the purposes of this question, hard infrastructure is defined as the physical networks such as roadways, sewer, broadband internet, airports, etc.; soft infrastructure refers to institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the healthcare system, system of government, and/or parks. What hard or soft infrastructure is missing or unsatisfactory in the City? (Select up to three responses.)

Response Option	# Rec'd
Roads and public transportation	20
Water & Sewer capacity and lines	3
Internet/Broadband	12
Other	13

“Other” responses included:

- Healthcare: Emergency clinics, hospital (7)
- Parks, sports fields, amenities (2)
- Educational Facilities (2)
- Retail space
- The City needs a lot of revitalizing in all aspects
- Public transport to Austin and San Marcos

Further comments on the City’s infrastructure include:

- The water quality is bad. We have to have a RO system just to use it in our business.
- The quality of electricity is also poor. We experience spikes and outages.
- Several of the City streets are substandard. We need more walkability — sidewalks and walking trails. We have no public transport other than CARTS.
- The cost of developing any area is daunting. Having to pay all the impact fees, put in streets per City guidelines, etc. stops some development.
- The internet services in Lockhart are awful! AT&T especially. There have been days/weeks every month I’m without service.
- I believe street conditions say a lot about the City — several of our main streets are in poor condition or have patch jobs. Streets such as Market Street and Prairie Lea are examples. If one were to come and visit our town, I feel this gives the perception that we do not upkeep our streets. I do know that budget has a lot to do with this though.
- Lockhart needs a clinic/hospital in the near future. The roads are mostly adequate now, but some need attention especially in the future.
- Internet is high speed if you have cable internet. Eventually, it will be coming, but at the present time, is wholly inadequate.
- I think we are OK here. Things will improve pretty naturally.
- This town is very bikeable. Bike lanes and a trail to the state park would be good. We have many bicyclists visit our town daily.

7. What would you work to change about the community, not worried about money or politics?

The specific responses given to this question are below. The summary provided attempted to identify the key common themes.

- The availability of educational opportunities post-high school graduation.
- Be more user friendly for developers and builders. Don't give carte blanche to them, but be more flexible.
- I would like to consider all the economic development incentive tools in the toolbox rather than just 380 and 381 agreements.
- Community center.
- Lockhart has been slow to embrace change. It has not wanted to change from status quo as a rural agricultural community. Improve the school system and you will attract more professionals looking for a place to live and commute to Austin. That will provide the money to improve all other areas of Lockhart.
- Welcoming change and growth, attract residents with higher education skill sets.
- Bring in a community college and/or trade school. Build a community center for the teenagers.
- More attention to maintaining adequate capacity in K–12 educational facilities. More sidewalks and walking trails.
- Make it more inclusive of all citizens.
- Make it good for all.
- Many locals are against change.
- A lot of areas need a good urban renewal program.
- I like it as is.
- More businesses for job opportunities.
- Substandard development in the County.
- The mindset! That we have some really great businesses here ... and they need to try them and support them. Honestly, it's the SAME group of people frequenting all the downtown places.
- I absolutely love our community first off — But I would like to see more support of our public education system. I would also like more people to be educated about how a city functions. Too many people want too much, but are not willing to pay for it.
- The community itself is one of the biggest draws! The safety and security are very important as the growth continues and must not be shortchanged.
- Appeal to more families and less young hipster types from Austin.
- Now sure about the question.
- They need to embrace businesses, welcome them.
- Stop the negativity on social media on local pages.
- I believe that we must change the mindset of many city employees and raise the level of expectations. Everything from customer service to hiring qualified professionals needs to be evaluated. These employees can give either a positive or negative image of the town. Investments need to be made to attract young families such as parks, sports fields, and quality library services.
- Improve education system to attract families relocating to the area as full-time inhabitants. Increase ease of access to San Antonio/New B areas.
- More awareness about the square. An information center. A billboard program on the major highways. Advertisements at the airports. A Lockhart street team that sets up a kiosk at events in other places.
- Increased housing, redevelopment incentives for the square and along 183, increased job skill training.

8. Give some examples of local unique and innovative programs or initiatives that you believe are having a positive impact on increasing the competitiveness of Lockhart.

Below is a list of the responses. The number in parentheses notes the number of respondents who mentioned the example.

- Festivals and events (e.g., Chisholm Trail Round Up festival) (6)
- Craft and technical training program at high school/educational initiatives (5)
- None (4)
- Downtown beautification/urban renewal (3)
- Downtown Business Association (2)
- Community organizations (2)
- Planned new hospital
- Infrastructure improvement projects
- Loosening of the controls over development
- Small town atmosphere with access to large metropolitan areas
- Toll road for easy commute
- Reasonable cost of living

9. Are there programs in peer/competitor regions that Lockhart should consider to make this city more competitive? If so, give examples.

Below is a list of the responses. The number in parentheses notes the number of respondents who mentioned the example.

- Do not know/none (3)
- Main Street programs (3)
- Bastrop County BEST group ideas
- Pflugerville marketing programs
- Luling Watermelon Thump, San Marcos
- Austin (e.g., music and art)
- Allowing guest houses on land currently occupied by owners and their residences would provide more living opportunities and also more income opportunities
- Upgrade of parks, build community center, lessen impact fees for new businesses
- More recreation/leisure activities
- All City workflow and billing systems should be electronic
- San Marcos Activity Center and library system

10. What types of companies do you think would be a good fit for the area? (Select all that apply.)

Response Option	# Rec'd
Manufacturing	29
Hospitality Industry/Tourist	
Attractions/Museum/Entertainment	19
Tech/Cybersecurity/Robotics	18
Film studios	15
Life Sciences	12
Data Centers	11
Call Centers	7

When asked to provide examples of other companies, respondents offered:

- Environmental sciences, agribusinesses
- Country club
- Affordable restaurants
- Establish Lockhart as a tech corridor, especially given nearby universities, airports, the existing infrastructure, and supportive business climate. If access to San Antonio was improved, it would only broaden the range of target companies

11. The COVID-19 Pandemic wreaked havoc on the U.S. economy. As it relates to your business (if you are a business owner) do you see your business able to operate again profitability at some point this year?

Response Option	# Rec'd
Yes	25
No	3

Respondents were given the opportunity to expand upon how their business is being affected. Below are the responses.

- I am an owner of a small construction business, and we will continue to operate during the crisis and beyond.
- Real estate is considered an essential business, so we are open. We do lack customers because folks need a provable income to purchase, and owners need qualified folks to sell to.
- Only if economy tunes up.
- It will be a struggle along with oil price decline.
- My business, being in insurance, will see the downfall effects a few months down the road. While I will see a decrease in revenue, I will still be able to operate and not lay off employees.
- This has caused a near death blow to many businesses, and I am especially concerned that those businesses where a family has their life savings in might fail. There should be efforts to help them to apply and receive federal help being offered to keep them afloat.
- We are an essential business, so we are very lucky. Our business has not suffered.

For respondents who answered yes to question 11, the survey further asked, “What can the City do to help your business return to profitable operations?” Responses include:

- This is a difficult question to answer. I believe the answer is yet, but until there is a vaccine, I don't think anyone can be certain.
- We're going to have to shift gears a bit to focus on selling to the local community rather than the tourists.
- Open restaurants.
- Balance the housing inventory in the City so people could live there and make it easier to attract industry.

12. Are there any other issues that should be examined when developing an economic development strategy for Lockhart?

The comments below were provided:

- I don't think any community should be content with their strategy. We should always be seeking ways to improve our position regarding economic development.
- Freeze Tax.
- Tax incentives for manufacturing.
- The median household income is low due to low wage jobs available. If we bring in a higher education facility, that could change.
- A balance among economic growth and continued quality of life.
- Could we do something to take advantage of the rail transportation facilities in and around Lockhart? Perhaps a multimodal transport terminal. I've heard that businesses want trucking services in Lockhart. That could be initiated in conjunction with a multimodal terminal. And also could include warehousing.
- Education, healthcare, transportation, parks and recreation.
- All the possible grant programs, as well as other programs that help the average folks do well, should be noted and be made available to all.
- Lockhart needs to decide if they are going to be a bedroom community or a business center.
- Really just get out of the way. There have been several businesses that have wanted to open in Lockhart over the past years and the City fathers have driven them away by being too close-minded and not being flexible. There definitely needs to be a house cleaning with a lot of the outdated decision-makers and rigid rules. Lockhart is not Austin.
- Stay friendly and willing to work with different industries/people.
- Talking to or including ALL businesses.
- The City should keep in mind that while bringing in new people and businesses to Lockhart, keeping things maintained for the current citizens should not be neglected.
- The planning department needs to work with the business community instead of working against it and being the "my way or the highway" department.
- Public relations and coordination.
- Ensure the strategies (near/mid/long-term) are well understood by community members and conveyed to external groups through as many mediums as possible.
- We already have many tourists coming here for BBQ. We need to focus on keeping them here for a longer time. We also should try to attract more.

Appendix B: Industry Details

The industry listing below marks major categories in blue and in bold text. Specialized industries have location quotients greater than 1.20 and are shaded.

Industry Title	2018 Annual Average Employment	2018 Annual Average Wage	Location Quotient Employment
NAICS 11 Agriculture, forestry, fishing and hunting	172	\$36,866	2.2
NAICS 111 Crop production	21	\$35,507	0.6
NAICS 112 Animal production and aquaculture	136	\$37,577	8.3
NAICS 115 Agriculture and forestry support activities	15	\$32,193	0.6
NAICS 21 Mining, quarrying, and oil and gas extraction	229	\$51,240	5.5
NAICS 211 Oil and gas extraction	56	\$53,029	6.4
NAICS 213 Support activities for mining	173	\$50,660	8.2
NAICS 22 Utilities—Local Government	38	\$58,611	2.5
NAICS 22 Utilities—Private	33	\$50,422	1.0
NAICS 23 Construction	613	\$53,303	1.4
NAICS 236 Construction of buildings	112	\$57,463	1.1
NAICS 237 Heavy and civil engineering construction	118	\$51,197	1.9
NAICS 238 Specialty trade contractors	384	\$52,736	1.4
NAICS 31-33 Manufacturing	668	\$38,548	0.9
NAICS 311 Food manufacturing	97	\$39,727	1.0
NAICS 315 Apparel manufacturing	19	\$43,069	2.7
NAICS 332 Fabricated metal product manufacturing	72	\$48,038	0.8
NAICS 42 Wholesale trade	183	\$46,501	0.5
NAICS 423 Merchant wholesalers, durable goods	55	\$62,641	0.3
NAICS 424 Merchant wholesalers, nondurable goods	52	\$58,159	0.4
NAICS 425 Electronic markets and agents and brokers	76	\$26,812	2.3
NAICS 44-45 Retail trade	1,356	\$29,155	1.4
NAICS 441 Motor vehicle and parts dealers	140	\$43,224	1.1
NAICS 442 Furniture and home furnishings stores	15	\$41,473	0.5
NAICS 444 Building material and garden supply stores	214	\$24,096	2.6
NAICS 445 Food and beverage stores	234	\$28,664	1.2
NAICS 446 Health and personal care stores	84	\$27,661	1.3
NAICS 447 Gasoline stations	341	\$28,906	5.9
NAICS 448 Clothing and clothing accessories stores	70	\$13,295	0.8
NAICS 453 Miscellaneous store retailers	37	\$34,231	0.7
NAICS 454 Nonstore retailers	10	\$36,856	0.3
NAICS 48-49 Transportation and warehousing—Federal Government	55	\$52,765	1.4
NAICS 491 Postal service	55	\$52,765	1.5
NAICS 48-49 Transportation and warehousing—Private	611	\$76,747	1.9
NAICS 484 Truck transportation	23	\$48,658	0.3
NAICS 486 Pipeline transportation	106	\$69,604	34.5
NAICS 488 Support activities for transportation	73	\$46,012	1.7
NAICS 51 Information	29	\$22,059	0.2
NAICS 52 Finance and insurance	218	\$52,244	0.6
NAICS 522 Credit intermediation and related activities	164	\$53,135	1.0
NAICS 524 Insurance carriers and related activities	43	\$42,532	0.3
NAICS 53 Real estate and rental and leasing	56	\$23,582	0.4
NAICS 531 Real estate	43	\$21,526	0.4

Industry Title	2018 Annual Average Employment	2018 Annual Average Wage	Location Quotient Employment
NAICS 56 Administrative and waste services-Local Government	10	\$31,482	2.2
NAICS 56 Administrative and waste services-Private	300	\$31,549	0.5
NAICS 561 Administrative and support services	273	\$28,675	0.5
NAICS 562 Waste management and remediation services	27	\$60,245	1.0
NAICS 61 Educational services	63	\$38,812	0.4
NAICS 611 Educational services	63	\$38,812	0.4
NAICS 62 Health care and social assistance	1,418	\$36,783	1.2
NAICS 621 Ambulatory health care services	223	\$48,228	0.5
NAICS 623 Nursing and residential care facilities	652	\$30,072	3.2
NAICS 71 Arts, entertainment, and recreation	87	\$65,913	0.6
NAICS 713 Amusements, gambling, and recreation	77	\$71,758	0.7
NAICS 72 Accommodation and food services	914	\$17,757	1.1
NAICS 721 Accommodation	52	\$15,058	0.4
NAICS 722 Food services and drinking places	862	\$17,920	1.2
NAICS 81 Other services	183	\$33,725	0.7
NAICS 811 Repair and maintenance	119	\$40,196	1.5
NAICS 812 Personal and laundry services	30	\$19,809	0.3
NAICS 813 Membership associations and organizations	26	\$21,499	0.3
NAICS 814 Private households	9	\$28,807	0.5
NAICS 92 Federal Government	7	\$45,440	0.1
NAICS 924 Administration of environmental programs	7	\$45,440	1.2
NAICS 92 Local Government	451	\$41,913	1.8
NAICS 921 Executive, legislative and general government	280	\$41,022	1.7
NAICS 922 Justice, public order, and safety activities	145	\$42,611	2.5
NAICS 926 Administration of economic programs	7	\$40,180	1.6
NAICS 92 State Government	60	\$46,355	0.5
10 Total, all industries	9,054	\$39,602	1.0

Source: Bureau of Labor Statistics, QCEW, Garner Economics

Management of Companies & Enterprises and Professional, Scientific & Technical Services sectors do not have sufficient information available for analysis. 2019 data is unavailable due to disclosure.

Appendix C: Occupational Details

Caldwell County Occupational Groups

Occupational data are available for Caldwell County at the high-level, or 2-digit SOC code. Specialized industries have location quotients greater than 1.20 and are shaded.

SOC Code	Occupational Group	Employment 2019	LQ	Annual Average Wages 2018
11-0000	Management	1,124	1.7	\$98,600
13-0000	Business & Financial Operations	285	0.5	\$65,000
15-0000	Computer & Mathematical	99	0.3	\$73,700
17-0000	Architecture & Engineering	85	0.5	\$89,700
19-0000	Life, Physical & Social Science	43	0.5	\$58,200
21-0000	Community & Social Service	199	1.1	\$41,500
23-0000	Legal	56	0.6	\$84,300
25-0000	Education, Training & Library	741	1.2	\$44,000
27-0000	Arts, Design, Entertainment, Sports & Media	116	0.6	\$47,800
29-0000	Healthcare Practitioners & Technical	577	0.9	\$61,900
31-0000	Healthcare Support	294	1.0	\$27,500
33-0000	Protective Service	292	1.3	\$48,000
35-0000	Food Preparation & Serving Related	1,034	1.1	\$22,900
37-0000	Building & Grounds Cleaning & Maintenance	394	1.1	\$24,300
39-0000	Personal Care & Service	497	1.1	\$21,400
41-0000	Sales & Related	1,121	1.1	\$30,400
43-0000	Office & Administrative Support	1,198	0.8	\$34,700
45-0000	Farming, Fishing & Forestry	114	1.7	\$34,000
47-0000	Construction & Extraction	853	1.7	\$38,300
49-0000	Installation, Maintenance & Repair	454	1.1	\$43,700
51-0000	Production	602	0.9	\$32,700
53-0000	Transportation & Material Moving	657	0.9	\$38,400
0	Total — All Occupations	10,836		\$40,200

Source: Jobs EQ, Workforce Solutions Rural Capital Area, Garner Economics

Austin Metro Occupational Groups

Occupational data are available for the Austin Metro with detailed SOC code data. Specialized industries have location quotients greater than 1.20 and are shaded.

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Management Occupations	11-0000	66,750	\$123,150	1.1
Chief Executives	11-1011	720	\$216,630	0.5
General and Operations Managers	11-1021	21,520	\$124,860	1.2
Legislators	11-1031	120	\$0	0.3
Advertising and Promotions Managers	11-2011	280	\$119,000	1.5
Public Relations and Fundraising Managers	11-2030	870	\$125,990	1.5
Administrative Services and Facilities Managers	11-3010	4,020	\$106,660	1.8
Financial Managers	11-3031	4,330	\$143,110	0.9
Industrial Production Managers	11-3051	770	\$122,000	0.6
Purchasing Managers	11-3061	550	\$130,240	1.1
Transportation, Storage, and Distribution Managers	11-3071	740	\$94,350	0.8
Compensation and Benefits Managers	11-3111	120	\$110,720	1.0
Human Resources Managers	11-3121	1,210	\$124,160	1.1
Training and Development Managers	11-3131	210	\$128,420	0.8
Construction Managers	11-9021	3,760	\$98,160	1.8
Education and Childcare Administrators, Preschool and Daycare	11-9031	410	\$46,380	1.1
Education Administrators, Kindergarten through Secondary	11-9032	2,150	\$88,930	1.1
Education Administrators, Postsecondary	11-9033	1,720	\$130,630	1.6
Education Administrators, All Other	11-9039	150	\$88,380	0.5
Food Service Managers	11-9051	1,590	\$65,040	0.9
Lodging Managers	11-9081	240	\$58,530	0.9
Medical and Health Services Managers	11-9111	2,190	\$107,220	0.8
Natural Sciences Managers	11-9121	440	\$145,670	0.9
Social and Community Service Managers	11-9151	810	\$71,460	0.7
Emergency Management Directors	11-9161	40	\$85,100	0.6
Personal Service Managers, Entertainment Managers, Except Gambling; and Managers, All Other	11-9198	2,590	\$116,980	0.8
Business and Financial Operations Occupations	13-0000	72,740	\$75,010	1.2
Agents and Business Managers of Artists, Performers, and Athletes	13-1011	150	\$59,120	1.2
Buyers and Purchasing Agents	13-1020	3,300	\$62,950	1.1
Compliance Officers	13-1041	2,020	\$65,690	0.9
Cost Estimators	13-1051	1,560	\$77,280	1.0
Human Resources Specialists	13-1071	5,300	\$74,810	1.2
Labor Relations Specialists	13-1075	330	\$55,440	0.6
Logisticians	13-1081	1,290	\$76,550	1.0
Meeting, Convention, and Event Planners	13-1121	1,150	\$49,900	1.3
Fundraisers	13-1131	600	\$57,490	1.0
Compensation, Benefits, and Job Analysis Specialists	13-1141	850	\$62,610	1.3
Training and Development Specialists	13-1151	2,970	\$58,550	1.3
Market Research Analysts and Marketing Specialists	13-1161	5,710	\$76,820	1.2
Project Management Specialists and Business Operations Specialists, All Other	13-1198	14,310	\$84,320	1.5

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Accountants and Auditors	13-2011	11,430	\$76,500	1.2
Property Appraisers and Assessors	13-2020	280	\$57,150	0.7
Budget Analysts	13-2031	540	\$70,510	1.4
Credit Analysts	13-2041	600	\$70,570	1.1
Personal Financial Advisors	13-2052	1,670	\$89,870	1.1
Insurance Underwriters	13-2053	750	\$82,790	1.0
Financial Examiners	13-2061	770	\$78,590	1.6
Credit Counselors	13-2071	170	\$51,040	0.7
Loan Officers	13-2072	1,470	\$75,740	0.7
Tax Examiners and Collectors, and Revenue Agents	13-2081	2,180	\$45,780	5.6
Financial and Investment Analysts, Financial Risk Specialists, and Financial Specialists, All Other	13-2098	4,260	\$80,490	1.3
Computer and Mathematical Occupations	15-0000	66,800	\$90,990	2.0
Computer Systems Analysts	15-1211	9,040	\$87,480	2.1
Information Security Analysts	15-1212	1,550	\$114,280	1.7
Computer and Information Research Scientists	15-1221	290	\$124,800	1.3
Computer Network Support Specialists	15-1231	2,750	\$62,880	2.0
Computer User Support Specialists	15-1232	8,270	\$52,690	1.8
Computer Network Architects	15-1241	2,160	\$116,300	1.9
Network and Computer Systems Administrators	15-1244	5,580	\$88,100	2.2
Database Administrators and Architects	15-1245	2,060	\$111,190	2.2
Computer Programmers	15-1251	3,290	\$91,960	2.3
Software Developers and Software Quality Assurance Analysts and Testers	15-1256	23,410	\$106,080	2.3
Web Developers and Digital Interface Designers	15-1257	2,160	\$80,570	2.0
Computer Occupations, All Other	15-1299	3,950	\$83,150	1.4
Actuaries	15-2011	340	\$109,210	2.1
Operations Research Analysts	15-2031	1,190	\$80,200	1.6
Statisticians	15-2041	280	\$89,320	1.0
Data Scientists and Mathematical Science Occupations, All Other	15-2098	370	\$104,500	1.7
Architecture and Engineering Occupations	17-0000	26,710	\$92,010	1.4
Architects, Except Landscape and Naval	17-1011	1,350	\$92,020	1.8
Landscape Architects	17-1012	200	\$67,580	1.3
Cartographers and Photogrammetrists	17-1021	100	\$62,160	1.2
Surveyors	17-1022	390	\$71,280	1.2
Civil Engineers	17-2051	3,770	\$91,080	1.7
Electrical Engineers	17-2071	2,590	\$105,490	1.9
Electronics Engineers, Except Computer	17-2072	2,780	\$130,890	3.0
Environmental Engineers	17-2081	300	\$88,240	0.8
Health and Safety Engineers, Except Mining Safety Engineers and Inspectors	17-2111	200	\$103,100	1.1
Industrial Engineers	17-2112	1,780	\$101,440	0.8
Materials Engineers	17-2131	410	\$98,820	2.1
Mechanical Engineers	17-2141	2,100	\$94,170	0.9
Mining and Geological Engineers, Including Mining Safety Engineers	17-2151	30	\$81,410	0.7
Petroleum Engineers	17-2171	450	\$151,060	1.9
Engineers, All Other	17-2199	1,170	\$109,310	1.1

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Architectural and Civil Drafters	17-3011	930	\$60,520	1.3
Electrical and Electronics Drafters	17-3012	310	\$62,370	1.7
Mechanical Drafters	17-3013	240	\$55,020	0.6
Drafters, All Other	17-3019	40	\$51,850	0.4
Aerospace Engineering and Operations Technologists and Technicians	17-3021	120	\$58,820	1.5
Civil Engineering Technologists and Technicians	17-3022	550	\$55,800	1.1
Electrical and Electronic Engineering Technologists and Technicians	17-3023	1,940	\$68,640	2.2
Electro-Mechanical and Mechatronics Technologists and Technicians	17-3024	40	\$56,690	0.4
Industrial Engineering Technologists and Technicians	17-3026	470	\$46,680	1.0
Mechanical Engineering Technologists and Technicians	17-3027	280	\$57,370	0.9
Surveying and Mapping Technicians	17-3031	1,120	\$42,140	2.9
Calibration and Engineering Technologists and Technicians, Except Drafters, All Other	17-3098	830	\$58,500	1.3
Life, Physical, and Social Science Occupations	19-0000	10,880	\$68,490	1.2
Biochemists and Biophysicists	19-1021	330	\$71,720	1.5
Microbiologists	19-1022	330	\$48,180	2.5
Biological Scientists, All Other	19-1029	150	\$76,760	0.5
Conservation Scientists	19-1031	440	\$57,340	2.7
Epidemiologists	19-1041	80	\$63,390	1.5
Medical Scientists, Except Epidemiologists	19-1042	660	\$92,450	0.7
Physicists	19-2012	240	\$88,030	2.0
Chemists	19-2031	450	\$70,030	0.7
Environmental Scientists and Specialists, Including Health	19-2041	1,160	\$69,470	1.9
Geoscientists, Except Hydrologists and Geographers	19-2042	470	\$100,610	2.2
Hydrologists	19-2043	90	\$59,530	1.9
Physical Scientists, All Other	19-2099	170	\$79,510	1.3
Economists	19-3011	50	\$75,460	0.4
Clinical, Counseling, and School Psychologists	19-3031	1,250	\$69,340	1.5
Psychologists, All Other	19-3039	40	\$93,780	0.4
Urban and Regional Planners	19-3051	520	\$62,820	1.9
Anthropologists and Archeologists	19-3091	90	\$65,970	1.8
Geographers	19-3092	100	\$63,920	10.0
Social Scientists and Related Workers, All Other	19-3099	150	\$80,960	0.6
Biological Technicians	19-4021	440	\$44,040	0.8
Chemical Technicians	19-4031	480	\$49,190	1.0
Environmental Science and Protection Technicians, Including Health	19-4042	280	\$47,070	1.2
Geological and Hydrologic Technicians	19-4045	230	\$64,890	1.9
Social Science Research Assistants	19-4061	420	\$47,000	1.6
Forest and Conservation Technicians	19-4071	40	\$47,060	0.3
Forensic Science Technicians	19-4092	230	\$50,700	1.9
Life, Physical, and Social Science Technicians, All Other	19-4099	360	\$58,770	0.8
Occupational Health and Safety Specialists	19-5011	750	\$72,780	1.1
Occupational Health and Safety Technicians	19-5012	150	\$52,380	1.0

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Community and Social Service Occupations	21-0000	11,620	\$49,100	0.7
Educational, Guidance, and Career Counselors and Advisors	21-1012	2,260	\$57,540	1.0
Rehabilitation Counselors	21-1015	320	\$52,800	0.4
Substance abuse, behavioral disorder, and mental health counselors	21-1018	1,510	\$48,960	0.7
Counselors, All Other	21-1019	130	\$51,120	0.7
Child, Family, and School Social Workers	21-1021	1,730	\$51,080	0.7
Healthcare Social Workers	21-1022	610	\$56,400	0.5
Mental Health and Substance Abuse Social Workers	21-1023	720	\$43,190	0.8
Social Workers, All Other	21-1029	240	\$48,160	0.6
Health Education Specialists	21-1091	190	\$62,640	0.5
Probation Officers and Correctional Treatment Specialists	21-1092	800	\$46,450	1.3
Social and Human Service Assistants	21-1093	1,980	\$39,030	0.7
Community Health Workers	21-1094	330	\$44,520	0.8
Community and Social Service Specialists, All Other	21-1099	480	\$38,710	0.7
Clergy	21-2011	190	\$48,830	0.5
Directors, Religious Activities and Education	21-2021	50	\$95,480	0.3
Legal Occupations	23-0000	11,070	\$103,450	1.3
Lawyers	23-1011	5,710	\$138,990	1.2
Judicial Law Clerks	23-1012	60	\$51,560	0.5
Administrative Law Judges, Adjudicators, and Hearing Officers	23-1021	110	\$86,570	1.0
Arbitrators, Mediators, and Conciliators	23-1022	120	\$54,500	2.7
Judges, Magistrate Judges, and Magistrates	23-1023	550	\$145,130	2.6
Paralegals and Legal Assistants	23-2011	3,790	\$55,590	1.6
Legal Support Workers, All Other	23-2099	160	\$88,440	0.5
Educational Instruction and Library Occupations	25-0000	62,330	\$54,210	1.0
Business Teachers, Postsecondary	25-1011	610	\$133,540	1.0
Computer Science Teachers, Postsecondary	25-1021	350	\$118,580	1.5
Mathematical Science Teachers, Postsecondary	25-1022	410	\$89,880	1.1
Engineering Teachers, Postsecondary	25-1032	530	\$138,830	2.0
Biological Science Teachers, Postsecondary	25-1042	390	\$110,340	1.0
Atmospheric, Earth, Marine, and Space Sciences Teachers, Postsecondary	25-1051	130	\$127,600	1.6
Chemistry Teachers, Postsecondary	25-1052	120	\$107,940	0.8
Physics Teachers, Postsecondary	25-1054	170	\$107,650	1.7
Anthropology and Archeology Teachers, Postsecondary	25-1061	80	\$103,720	1.9
Area, Ethnic, and Cultural Studies Teachers, Postsecondary	25-1062	130	\$82,620	1.7
Economics Teachers, Postsecondary	25-1063	90	\$141,040	0.9
Geography Teachers, Postsecondary	25-1064	80	\$102,010	2.6
Political Science Teachers, Postsecondary	25-1065	320	\$100,770	2.8
Psychology Teachers, Postsecondary	25-1066	260	\$99,230	0.9
Sociology Teachers, Postsecondary	25-1067	120	\$101,670	1.2
Health Specialties Teachers, Postsecondary	25-1071	560	\$88,350	0.4
Nursing Instructors and Teachers, Postsecondary	25-1072	390	\$77,870	0.9
Education Teachers, Postsecondary	25-1081	440	\$82,400	1.0

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Criminal Justice and Law Enforcement Teachers, Postsecondary	25-1111	70	\$87,420	0.7
Social Work Teachers, Postsecondary	25-1113	140	\$79,200	1.4
Art, Drama, and Music Teachers, Postsecondary	25-1121	700	\$80,760	1.0
Communications Teachers, Postsecondary	25-1122	350	\$83,610	1.7
English Language and Literature Teachers, Postsecondary	25-1123	490	\$78,130	1.0
Foreign Language and Literature Teachers, Postsecondary	25-1124	260	\$76,280	1.4
History Teachers, Postsecondary	25-1125	190	\$98,140	1.3
Philosophy and Religion Teachers, Postsecondary	25-1126	140	\$85,480	0.8
Recreation and Fitness Studies Teachers, Postsecondary	25-1193	130	\$77,820	1.1
Career/Technical Education Teachers, Postsecondary	25-1194	1,100	\$59,210	1.3
Postsecondary Teachers, All Other	25-1199	180	\$62,180	0.1
Preschool Teachers, Except Special Education	25-2011	4,160	\$34,160	1.3
Kindergarten Teachers, Except Special Education	25-2012	1,340	\$57,780	1.5
Elementary School Teachers, Except Special Education	25-2021	9,820	\$58,490	0.9
Middle School Teachers, Except Special and Career/Technical Education	25-2022	4,640	\$57,720	1.0
Career/Technical Education Teachers, Middle School	25-2023	140	\$67,260	1.6
Secondary School Teachers, Except Special and Career/Technical Education	25-2031	6,020	\$58,690	0.8
Career/Technical Education Teachers, Secondary School	25-2032	1,090	\$67,840	2.0
Special Education Teachers, Kindergarten and Elementary School	25-2052	1,430	\$59,400	1.0
Special Education Teachers, Middle School	25-2057	880	\$57,490	1.4
Special Education Teachers, Secondary School	25-2058	1,430	\$58,770	1.4
Special Education Teachers, All Other	25-2059	350	\$54,590	1.4
Adult Basic Education, Adult Secondary Education, and English as a Second Language Instructors	25-3011	430	\$57,240	1.1
Self-Enrichment Teachers	25-3021	2,010	\$40,170	1.1
Substitute Teachers, Short-Term	25-3031	7,240	\$27,860	1.7
Tutors and Teachers and Instructors, All Other	25-3097	2,210	\$36,530	1.0
Archivists	25-4011	70	\$58,600	1.4
Curators	25-4012	60	\$71,010	0.6
Museum Technicians and Conservators	25-4013	70	\$45,530	0.7
Librarians and Media Collections Specialists	25-4022	940	\$62,880	0.9
Library Technicians	25-4031	340	\$36,920	0.5
Instructional Coordinators	25-9031	1,580	\$65,060	1.2
Teaching Assistants, Except Postsecondary	25-9045	5,890	\$25,620	0.6
Educational Instruction and Library Workers, All Other	25-9099	620	\$49,240	0.7
Arts, Design, Entertainment, Sports, and Media Occupations	27-0000	21,360	\$60,440	1.5
Art Directors	27-1011	620	\$84,600	2.0
Craft Artists	27-1012	70	\$38,380	2.1
Fine Artists, Including Painters, Sculptors, and Illustrators	27-1013	110	\$46,110	1.2
Special Effects Artists and Animators	27-1014	1,430	\$85,460	6.7

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Artists and Related Workers, All Other	27-1019	50	\$52,760	0.9
Commercial and Industrial Designers	27-1021	180	\$62,850	0.8
Floral Designers	27-1023	170	\$30,920	0.6
Graphic Designers	27-1024	2,210	\$54,690	1.4
Interior Designers	27-1025	790	\$57,960	1.8
Merchandise Displayers and Window Trimmers	27-1026	1,320	\$31,690	1.3
Set and Exhibit Designers	27-1027	60	\$47,510	0.7
Producers and Directors	27-2012	1,020	\$73,360	1.1
Coaches and Scouts	27-2022	1,730	\$50,170	1.0
Umpires, Referees, and Other Sports Officials	27-2023	130	\$27,460	0.9
Music Directors and Composers	27-2041	60	\$0	0.7
Musicians and Singers	27-2042	400	\$0	1.3
Public Relations Specialists	27-3031	4,060	\$62,460	2.3
Editors	27-3041	1,150	\$83,060	1.6
Technical Writers	27-3042	910	\$68,320	2.5
Writers and Authors	27-3043	360	\$61,840	1.1
Interpreters and Translators	27-3091	1,040	\$78,060	2.4
Court Reporters and Simultaneous Captioners	27-3092	60	\$79,360	0.6
Media and Communication Workers, All Other	27-3099	160	\$36,970	0.9
Audio and Video Technicians	27-4011	690	\$39,290	1.3
Sound Engineering Technicians	27-4014	140	\$58,830	1.5
Photographers	27-4021	320	\$48,770	0.9
Camera Operators, Television, Video, and Film	27-4031	120	\$48,590	0.7
Film and Video Editors	27-4032	380	\$54,370	1.9
Healthcare Practitioners and Technical Occupations	29-0000	50,110	\$81,090	0.8
Chiropractors	29-1011	290	\$88,580	1.2
Dentists, General	29-1021	650	\$164,340	0.8
Dietitians and Nutritionists	29-1031	390	\$54,290	0.8
Optometrists	29-1041	250	\$120,070	0.9
Pharmacists	29-1051	1,730	\$128,620	0.8
Physician Assistants	29-1071	710	\$110,650	0.8
Occupational Therapists	29-1122	710	\$78,220	0.7
Physical Therapists	29-1123	1,230	\$88,720	0.7
Recreational Therapists	29-1125	70	\$48,890	0.5
Respiratory Therapists	29-1126	880	\$59,830	0.9
Speech-Language Pathologists	29-1127	1,270	\$71,270	1.1
Exercise Physiologists	29-1128	50	\$45,600	0.9
Therapists, All Other	29-1129	80	\$73,550	0.9
Veterinarians	29-1131	530	\$147,480	1.0
Registered Nurses	29-1141	14,860	\$72,170	0.7
Nurse Practitioners	29-1171	930	\$107,720	0.6
Audiologists	29-1181	40	\$80,210	0.4
Family Medicine Physicians	29-1215	970	\$219,350	1.2
General Internal Medicine Physicians	29-1216	300	\$197,000	0.9
Obstetricians and Gynecologists	29-1218	180	\$255,430	1.3
Physicians, All Other; and Ophthalmologists, Except Pediatric	29-1228	1,760	\$226,700	0.6
Surgeons, Except Ophthalmologists	29-1248	210	\$233,110	0.8

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Dental Hygienists	29-1292	1,250	\$84,570	0.8
Acupuncturists and Healthcare Diagnosing or Treating Practitioners, All Other	29-1298	120	\$0	0.5
Clinical Laboratory Technologists and Technicians	29-2010	2,110	\$49,800	0.9
Cardiovascular Technologists and Technicians	29-2031	410	\$58,770	1.0
Diagnostic Medical Sonographers	29-2032	430	\$72,800	0.8
Nuclear Medicine Technologists	29-2033	40	\$79,090	0.3
Radiologic Technologists and Technicians	29-2034	1,170	\$58,790	0.8
Magnetic Resonance Imaging Technologists	29-2035	240	\$75,750	0.9
Emergency Medical Technicians and Paramedics	29-2040	1,610	\$48,860	0.9
Pharmacy Technicians	29-2052	3,350	\$35,760	1.1
Psychiatric Technicians	29-2053	570	\$34,000	1.0
Surgical Technologists	29-2055	780	\$51,250	1.0
Veterinary Technologists and Technicians	29-2056	1,190	\$32,140	1.5
Licensed Practical and Licensed Vocational Nurses	29-2061	3,650	\$48,410	0.7
Opticians, Dispensing	29-2081	560	\$38,490	1.1
Orthotists and Prosthetists	29-2091	70	\$75,900	0.9
Medical Dosimetrists and Records Specialists, and Health Technologists and Technicians, All Other	29-2098	1,950	\$40,850	0.8
Athletic Trainers	29-9091	220	\$59,880	1.0
Healthcare Support Occupations	31-0000	28,280	\$31,430	0.6
Home Health and Personal Care Aides	31-1120	10,410	\$22,400	0.5
Nursing Assistants	31-1131	4,640	\$29,500	0.5
Psychiatric Aides	31-1133	600	\$30,660	1.5
Occupational Therapy Assistants	31-2011	190	\$68,100	0.6
Physical Therapist Assistants	31-2021	650	\$66,000	0.9
Physical Therapist Aides	31-2022	510	\$26,660	1.4
Massage Therapists	31-9011	660	\$0	0.8
Dental Assistants	31-9091	2,670	\$42,230	1.0
Medical Assistants	31-9092	5,060	\$35,340	1.0
Medical Equipment Preparers	31-9093	230	\$34,560	0.6
Veterinary Assistants and Laboratory Animal Caretakers	31-9096	610	\$26,580	0.9
Phlebotomists	31-9097	690	\$35,430	0.7
Healthcare Support Workers, All Other	31-9099	630	\$48,040	0.9
Protective Service Occupations	33-0000	22,440	\$49,960	0.9
First-Line Supervisors of Correctional Officers	33-1011	230	\$67,480	0.7
First-Line Supervisors of Police and Detectives	33-1012	590	\$94,750	0.7
First-Line Supervisors of Firefighting and Prevention Workers	33-1021	350	\$80,140	0.7
Miscellaneous First-Line Supervisors, Protective Service Workers	33-1090	440	\$50,220	0.7
Firefighters	33-2011	2,360	\$62,750	1.0
Fire Inspectors and Investigators	33-2021	60	\$62,530	0.6
Bailiffs	33-3011	30	\$45,290	0.2
Correctional Officers and Jailers	33-3012	1,860	\$44,340	0.6
Detectives and Criminal Investigators	33-3021	1,550	\$73,800	2.0
Parking Enforcement Workers	33-3041	70	\$36,060	1.3
Police and Sheriff's Patrol Officers	33-3051	4,350	\$73,350	0.9

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Animal Control Workers	33-9011	70	\$38,490	0.8
Private Detectives and Investigators	33-9021	340	\$47,420	1.3
Security Guards	33-9032	7,200	\$31,880	0.9
Crossing Guards and Flaggers	33-9091	650	\$21,980	1.0
Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers	33-9092	930	\$23,280	0.9
Transportation Security Screeners	33-9093	410	\$41,360	1.2
School Bus Monitors and Protective Service Workers, All Other	33-9098	910	\$26,480	0.9
Food Preparation and Serving Related Occupations	35-0000	111,780	\$26,330	1.1
Chefs and Head Cooks	35-1011	840	\$58,190	0.9
First-Line Supervisors of Food Preparation and Serving Workers	35-1012	8,740	\$43,990	1.2
Cooks, Fast Food	35-2011	3,050	\$22,280	0.8
Cooks, Institution and Cafeteria	35-2012	2,620	\$26,330	0.9
Cooks, Restaurant	35-2014	13,350	\$27,260	1.3
Cooks, Short Order	35-2015	1,210	\$24,980	1.1
Cooks, All Other	35-2019	40	\$31,790	0.3
Food Preparation Workers	35-2021	6,560	\$27,210	1.0
Bartenders	35-3011	5,410	\$26,680	1.2
Fast Food and Counter Workers	35-3023	34,320	\$23,280	1.2
Waiters and Waitresses	35-3031	21,700	\$24,280	1.2
Food Servers, Nonrestaurant	35-3041	1,820	\$23,900	0.9
Dining Room and Cafeteria Attendants and Bartender Helpers	35-9011	4,780	\$22,860	1.4
Dishwashers	35-9021	3,310	\$24,100	0.9
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	35-9031	3,730	\$23,680	1.2
Food Preparation and Serving Related Workers, All Other	35-9099	300	\$26,010	0.6
Building and Grounds Cleaning and Maintenance Occupations	37-0000	30,580	\$28,710	0.9
First-Line Supervisors of Housekeeping and Janitorial Workers	37-1011	860	\$43,390	0.8
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	37-1012	930	\$47,720	1.2
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	37-2011	13,780	\$28,010	0.9
Maids and Housekeeping Cleaners	37-2012	6,840	\$22,650	1.0
Pest Control Workers	37-2021	590	\$37,380	1.0
Landscaping and Groundskeeping Workers	37-3011	7,330	\$30,440	1.1
Personal Care and Service Occupations	39-0000	22,580	\$30,840	0.9
First-Line Supervisors of Personal Service and Entertainment Workers, Except Gambling Services	39-1098	1,190	\$42,790	0.8
Animal Trainers	39-2011	110	\$34,670	0.9
Animal Caretakers	39-2021	1,950	\$26,560	1.3
Gambling and Sports Book Writers and Runners	39-3012	70	\$29,680	1.0
Ushers, Lobby Attendants, and Ticket Takers	39-3031	720	\$24,570	0.7
Amusement and Recreation Attendants	39-3091	1,920	\$22,660	0.8
Barbers	39-5011	730	\$41,280	5.0
Hairdressers, Hairstylists, and Cosmetologists	39-5012	3,540	\$34,410	1.3

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Baggage Porters and Bellhops	39-6011	190	\$23,770	0.6
Concierges	39-6012	210	\$34,600	0.7
Tour and Travel Guides	39-7010	260	\$25,690	0.7
Childcare Workers	39-9011	4,270	\$24,850	1.0
Exercise Trainers and Group Fitness Instructors	39-9031	3,010	\$38,700	1.3
Recreation Workers	39-9032	1,910	\$28,920	0.7
Residential Advisors	39-9041	800	\$31,580	1.0
Sales and Related Occupations	41-0000	112,930	\$46,560	1.1
First-Line Supervisors of Retail Sales Workers	41-1011	8,390	\$45,520	1.0
First-Line Supervisors of Non-Retail Sales Workers	41-1012	2,740	\$74,410	1.5
Cashiers	41-2011	21,400	\$24,550	0.8
Counter and Rental Clerks	41-2021	3,200	\$33,100	1.1
Parts Salespersons	41-2022	1,240	\$36,190	0.7
Retail Salespersons	41-2031	31,930	\$29,070	1.0
Advertising Sales Agents	41-3011	1,110	\$63,310	1.2
Insurance Sales Agents	41-3021	2,800	\$57,310	0.9
Securities, Commodities, and Financial Services Sales Agents	41-3031	3,120	\$76,360	1.0
Travel Agents	41-3041	280	\$38,700	0.6
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	41-3091	13,080	\$54,330	1.7
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	41-4011	6,750	\$103,120	3.0
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	41-4012	8,720	\$58,790	0.9
Demonstrators and Product Promoters	41-9011	720	\$33,090	1.3
Real Estate Brokers	41-9021	170	\$0	0.6
Real Estate Sales Agents	41-9022	1,890	\$71,810	1.6
Telemarketers	41-9041	910	\$38,010	0.9
Door-to-Door Sales Workers, News and Street Vendors, and Related Workers	41-9091	210	\$35,090	3.2
Sales and Related Workers, All Other	41-9099	1,200	\$38,010	1.4
Office and Administrative Support Occupations	43-0000	162,240	\$41,060	1.1
First-Line Supervisors of Office and Administrative Support Workers	43-1011	11,540	\$64,360	1.1
Switchboard Operators, Including Answering Service	43-2011	350	\$28,090	0.7
Bill and Account Collectors	43-3011	2,440	\$36,680	1.4
Billing and Posting Clerks	43-3021	3,230	\$40,730	1.0
Bookkeeping, Accounting, and Auditing Clerks	43-3031	11,990	\$43,290	1.1
Payroll and Timekeeping Clerks	43-3051	1,270	\$57,060	1.2
Procurement Clerks	43-3061	350	\$42,850	0.7
Tellers	43-3071	3,330	\$30,520	1.0
Brokerage Clerks	43-4011	470	\$50,540	1.3
Court, Municipal, and License Clerks	43-4031	1,330	\$41,790	1.2
Credit Authorizers, Checkers, and Clerks	43-4041	220	\$43,040	1.1
Customer Service Representatives	43-4051	27,460	\$34,710	1.3
Eligibility Interviewers, Government Programs	43-4061	1,660	\$45,440	1.6
File Clerks	43-4071	800	\$31,300	1.1
Hotel, Motel, and Resort Desk Clerks	43-4081	2,050	\$24,950	1.1

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Interviewers, Except Eligibility and Loan	43-4111	840	\$34,680	0.6
Library Assistants, Clerical	43-4121	220	\$29,460	0.4
Loan Interviewers and Clerks	43-4131	1,510	\$46,140	1.0
New Accounts Clerks	43-4141	350	\$38,780	1.1
Order Clerks	43-4151	1,070	\$36,100	1.1
Human Resources Assistants, Except Payroll and Timekeeping	43-4161	1,120	\$43,200	1.3
Receptionists and Information Clerks	43-4171	6,310	\$29,830	0.8
Reservation and Transportation Ticket Agents and Travel Clerks	43-4181	830	\$45,430	0.9
Information and Record Clerks, All Other	43-4199	2,070	\$34,090	1.8
Cargo and Freight Agents	43-5011	520	\$45,260	0.7
Couriers and Messengers	43-5021	600	\$25,520	1.1
Public Safety Telecommunicators	43-5031	570	\$42,480	0.8
Dispatchers, Except Police, Fire, and Ambulance	43-5032	1,020	\$42,560	0.7
Meter Readers, Utilities	43-5041	90	\$0	0.4
Postal Service Clerks	43-5051	360	\$48,900	0.6
Postal Service Mail Carriers	43-5052	1,850	\$52,030	0.7
Postal Service Mail Sorters, Processors, and Processing Machine Operators	43-5053	530	\$51,330	0.7
Production, Planning, and Expediting Clerks	43-5061	2,150	\$45,730	0.8
Shipping, Receiving, and Inventory Clerks	43-5071	4,820	\$34,760	0.9
Weighers, Measurers, Checkers, and Samplers, Recordkeeping	43-5111	180	\$34,240	0.4
Executive Secretaries and Executive Administrative Assistants	43-6011	8,140	\$60,500	2.1
Legal Secretaries and Administrative Assistants	43-6012	1,280	\$45,610	1.0
Medical Secretaries and Administrative Assistants	43-6013	5,870	\$37,550	1.3
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	43-6014	18,350	\$37,620	1.2
Data Entry Keyers	43-9021	2,260	\$33,830	1.9
Insurance Claims and Policy Processing Clerks	43-9041	2,230	\$42,920	1.2
Mail Clerks and Mail Machine Operators, Except Postal Service	43-9051	960	\$30,990	1.6
Office Clerks, General	43-9061	26,140	\$39,810	1.2
Office Machine Operators, Except Computer	43-9071	420	\$34,750	1.3
Office and Administrative Support Workers, All Other	43-9199	530	\$38,420	0.4
Farming, Fishing, and Forestry Occupations	45-0000	1,330	\$33,370	0.4
First-Line Supervisors of Farming, Fishing, and Forestry Workers	45-1011	50	\$57,770	0.3
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	45-2092	260	\$28,350	0.1
Farmworkers, Farm, Ranch, and Aquacultural Animals	45-2093	500	\$37,940	1.9
Construction and Extraction Occupations	47-0000	44,950	\$44,500	1.0
First-Line Supervisors of Construction Trades and Extraction Workers	47-1011	5,070	\$66,750	1.1
Brickmasons and Blockmasons	47-2021	90	\$47,690	0.2
Carpenters	47-2031	3,250	\$39,440	0.6
Tile and Stone Setters	47-2044	220	\$37,080	0.8
Cement Masons and Concrete Finishers	47-2051	1,840	\$39,410	1.3
Construction Laborers	47-2061	8,340	\$32,680	1.1

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Paving, Surfacing, and Tamping Equipment Operators	47-2071	510	\$39,670	1.5
Operating Engineers and Other Construction Equipment Operators	47-2073	3,230	\$41,630	1.1
Drywall and Ceiling Tile Installers	47-2081	1,420	\$41,700	1.9
Electricians	47-2111	4,760	\$53,260	1.0
Glaziers	47-2121	550	\$37,100	1.4
Painters, Construction and Maintenance	47-2141	1,650	\$36,760	1.0
Pipelayers	47-2151	490	\$37,840	1.9
Plumbers, Pipefitters, and Steamfitters	47-2152	3,100	\$51,300	1.0
Reinforcing Iron and Rebar Workers	47-2171	260	\$41,790	1.9
Roofers	47-2181	820	\$35,090	0.9
Sheet Metal Workers	47-2211	850	\$48,040	0.9
Structural Iron and Steel Workers	47-2221	460	\$49,760	0.8
Helpers—Carpenters	47-3012	220	\$32,550	0.9
Helpers—Electricians	47-3013	840	\$34,570	1.5
Helpers—Pipelayers, Plumbers, Pipefitters, and Steamfitters	47-3015	790	\$31,640	1.9
Helpers, Construction Trades, All Other	47-3019	390	\$31,120	1.9
Construction and Building Inspectors	47-4011	760	\$62,110	0.9
Elevator and Escalator Installers and Repairers	47-4021	200	\$77,090	1.0
Highway Maintenance Workers	47-4051	470	\$38,160	0.4
Excavating and Loading Machine and Dragline Operators, Surface Mining	47-5022	710	\$42,390	2.2
Rock Splitters, Quarry	47-5051	160	\$29,520	4.3
Earth Drillers, Except Oil and Gas; and Explosives Workers, Ordnance Handling Experts, and Blasters	47-5097	250	\$40,320	1.4
Installation, Maintenance, and Repair Occupations	49-0000	36,900	\$46,980	0.9
First-Line Supervisors of Mechanics, Installers, and Repairers	49-1011	3,150	\$66,790	0.9
Computer, Automated Teller, and Office Machine Repairers	49-2011	1,080	\$38,340	1.5
Radio, Cellular, and Tower Equipment Installers and Repairers	49-2021	110	\$43,100	1.1
Telecommunications Equipment Installers and Repairers, Except Line Installers	49-2022	1,350	\$52,660	0.9
Avionics Technicians	49-2091	50	\$49,950	0.3
Electric Motor, Power Tool, and Related Repairers	49-2092	50	\$48,380	0.5
Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	49-2095	120	\$72,650	0.7
Security and Fire Alarm Systems Installers	49-2098	990	\$47,070	1.9
Aircraft Mechanics and Service Technicians	49-3011	680	\$63,710	0.7
Automotive Glass Installers and Repairers	49-3022	330	\$37,410	2.3
Automotive Service Technicians and Mechanics	49-3023	4,290	\$53,340	0.9
Bus and Truck Mechanics and Diesel Engine Specialists	49-3031	1,220	\$50,540	0.6
Farm Equipment Mechanics and Service Technicians	49-3041	70	\$41,280	0.3
Mobile Heavy Equipment Mechanics, Except Engines	49-3042	850	\$51,280	0.8
Outdoor Power Equipment and Other Small Engine Mechanics	49-3053	230	\$41,300	1.0
Tire Repairers and Changers	49-3093	1,070	\$27,060	1.3

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Control and Valve Installers and Repairers, Except Mechanical Door	49-9012	290	\$43,650	0.8
Heating, Air Conditioning & Refrigeration Mechanics and Installers	49-9021	2,460	\$44,200	1.0
Home Appliance Repairers	49-9031	80	\$39,970	0.4
Industrial Machinery Mechanics	49-9041	1,380	\$54,240	0.5
Maintenance Workers, Machinery	49-9043	150	\$45,070	0.3
Electrical Power-Line Installers and Repairers	49-9051	650	\$64,720	0.8
Telecommunications Line Installers and Repairers	49-9052	990	\$51,440	1.1
Medical Equipment Repairers	49-9062	350	\$47,380	1.0
Maintenance and Repair Workers, General	49-9071	9,240	\$38,170	0.9
Coin, Vending, and Amusement Machine Servicers and Repairers	49-9091	140	\$30,890	0.6
Helpers—Installation, Maintenance, and Repair Workers	49-9098	1,100	\$29,690	1.5
Installation, Maintenance, and Repair Workers, All Other	49-9099	610	\$46,100	0.5
Production Occupations	51-0000	40,340	\$37,890	0.6
First-Line Supervisors of Production and Operating Workers	51-1011	2,760	\$65,090	0.6
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	51-2028	1,810	\$33,510	0.9
Structural Metal Fabricators and Fitters	51-2041	540	\$36,790	1.0
Miscellaneous Assemblers and Fabricators	51-2090	3,910	\$29,950	0.4
Bakers	51-3011	1,350	\$28,040	1.0
Butchers and Meat Cutters	51-3021	580	\$34,440	0.6
Food Batchmakers	51-3092	880	\$28,710	0.8
Food Processing Workers, All Other	51-3099	150	\$29,070	0.5
Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	51-4021	170	\$29,190	0.3
Rolling Machine Setters, Operators, and Tenders, Metal and Plastic	51-4023	30	\$33,790	0.1
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	51-4031	570	\$34,850	0.4
Grinding/Lapping/Polishing/Buffering Machine Tool Setters, Operators, and Tenders, Metal and Plastic	51-4033	230	\$33,360	0.4
Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	51-4034	100	\$30,220	0.5
Machinists	51-4041	1,740	\$48,150	0.6
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	51-4072	600	\$28,280	0.5
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	51-4081	580	\$38,860	0.5
Welders, Cutters, Solderers, and Brazers	51-4121	1,650	\$44,290	0.6
Metal Workers and Plastic Workers, All Other	51-4199	110	\$31,040	0.6
Prepress Technicians and Workers	51-5111	320	\$39,860	1.4
Printing Press Operators	51-5112	840	\$36,280	0.7
Print Binding and Finishing Workers	51-5113	90	\$37,360	0.3
Laundry and Dry-Cleaning Workers	51-6011	1,350	\$25,080	0.9
Sewing Machine Operators	51-6031	840	\$24,240	0.9
Shoe and Leather Workers and Repairers	51-6041	150	\$0	2.3

Occupation	SOC Code	2019 Employment	Annual Mean Wage	Location Quotient
Tailors, Dressmakers, and Custom Sewers	51-6052	340	\$0	1.9
Cabinetmakers and Bench Carpenters	51-7011	1,140	\$33,750	1.6
Furniture Finishers	51-7021	60	\$28,160	0.5
Power Distributors and Dispatchers	51-8012	50	\$69,110	0.6
Power Plant Operators	51-8013	190	\$74,540	0.8
Water and Wastewater Treatment Plant and System Operators	51-8031	630	\$44,940	0.7
Chemical Equipment Operators and Tenders	51-9011	220	\$43,120	0.3
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	51-9012	400	\$55,100	1.1
Crushing, Grinding, and Polishing Machine Operators	51-9021	110	\$35,620	0.4
Cutting and Slicing Machine Setters, Operators	51-9032	180	\$34,970	0.4
Inspectors, Testers, Sorters, Samplers, and Weighers	51-9061	4,050	\$45,000	1.0
Jewelers and Precious Stone and Metal Workers	51-9071	290	\$46,490	1.7
Dental Laboratory Technicians	51-9081	150	\$43,040	0.6
Medical Appliance Technicians	51-9082	210	\$39,430	2.0
Packaging and Filling Machine Operators and Tenders	51-9111	940	\$28,490	0.3
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	51-9124	460	\$44,860	0.4
Semiconductor Processing Technicians	51-9141	1,440	\$36,700	7.1
Computer Numerically Controlled Tool Operators	51-9161	290	\$44,340	0.3
Computer Numerically Controlled Tool Programmers	51-9162	100	\$64,980	0.5
Molders, Shapers, and Casters, Except Metal and Plastic	51-9195	380	\$36,240	1.2
Paper Goods Machine Setters, Operators	51-9196	180	\$29,550	0.3
Helpers—Production Workers	51-9198	1,670	\$29,660	0.8
Transportation & Material Moving Occupations	53-0000	58,650	\$34,670	0.6
First-Line Supervisors of Transportation Workers, Except Aircraft Cargo Handling Supervisors	53-1047	2,330	\$52,860	0.7
Commercial Pilots	53-2012	80	\$103,100	0.3
Driver/Sales Workers	53-3031	3,980	\$29,330	1.2
Heavy and Tractor-Trailer Truck Drivers	53-3032	8,120	\$42,320	0.6
Light Truck Drivers	53-3033	4,420	\$43,820	0.7
Bus Drivers, Transit and Intercity	53-3052	1,310	\$40,020	1.0
Passenger Vehicle Drivers	53-3058	3,500	\$30,050	0.7
Parking Attendants	53-6021	990	\$24,540	0.9
Automotive and Watercraft Service Attendants	53-6031	1,110	\$28,620	1.3
Traffic Technicians	53-6041	70	\$35,190	1.3
Crane and Tower Operators	53-7021	470	\$60,400	1.4
Industrial Truck and Tractor Operators	53-7051	4,070	\$32,750	0.9
Cleaners of Vehicles and Equipment	53-7061	2,550	\$25,950	0.9
Laborers and Freight, Stock, and Material Movers, Hand	53-7062	11,440	\$30,550	0.5
Packers and Packagers, Hand	53-7064	1,410	\$27,860	0.3
Stockers and Order Fillers	53-7065	10,810	\$29,900	0.7
Pump Operators, Except Wellhead Pumps	53-7072	90	\$41,800	1.3
Refuse and Recyclable Material Collectors	53-7081	580	\$37,950	0.7
All Occupations	-	1,073,340	\$55,190	1.0

Source: U.S. Bureau of Labor

Appendix D: Index of Figures & Tables

List of Figures:

	Page		
Figure 1	3	Figure 5.1 Unemployment Rate Trends, 2000–2019	25
Figure 2.1	7	Figure 5.2 Labor Force Participation, 2013–2018.....	26
Figure 2.2: Survey Responses	8	Figure 5.3 Labor Force Participation of Families, 2018.....	27
Figure 4.1 Population Growth, 2008–2018	13	Figure 5.4 Self Employment	28
Figure 4.2 Lockhart Population Growth, 2008–2018.....	13	Figure 5.5 Startup Ratio per 10,000 Population	28
Figure 4.3 Estimated Annual Growth Rate for Austin and San Antonio Regions, 2019–2024	13	Figure 5.6 Drive Time Analysis (45-Minute), 2019.....	29
Figure 4.4 Age Distribution & Median Age, 2018	14	Figure 5.7 Commuting Patterns City of Lockhart & Caldwell County, 2017	30
Figure 4.5 Change in Age Groups as a Percentage of Total Population, 2013–2018	15	Figure 5.8 In-Commuting Home County.....	30
Figure 4.6 Current Residents Who Moved from Outside County, State or Abroad, 2018.....	16	Figure 5.9 Out-Commuting Employer County.....	30
Figure 4.7 Educational Attainment, 2018.....	17	Figure 5.10 City of Lockhart Commuting Trends, 2007-2017	31
Figure 4.8 Change in Educational Attainment as a Percentage of Total Population, 2013–2018	17	Figure 5.11 City of Lockhart Net Commuter Outflow Trend, 2007-2017 ..	31
Figure 4.9 Graduation Rate (4-Year Cohort), 2014–2018	18	Figure 5.12 Job Growth, 2007–2018	32
Figure 4.10 Composite ACT Scores, 2017	18	Figure 5.13 Average Wage Growth (Adjusted for Inflation), 2008-2018 ...	33
Figure 4.11 Average SAT Scores, 2017.....	18	Figure 5.14 Average Annual Wage, 2019	33
Figure 4.12 Composite ACT Scores, 2013-2017	19	Figure 5.15 Colleges & Universities (45-Minute Drive Time of Lockhart) ..	35
Figure 4.13 Average SAT Scores, 2013-2017	19	Figure 5.16 Credentials Granted by Type, 2018	36
Figure 4.14 Household Income, 2018.....	20	Figure 6.1 Caldwell County Employment Change by Major Industry, 2013– 2018	37
Figure 4.15 Change in Household Income Distribution, 2013–2018	21	Figure 6.2 Caldwell County Average Annual Industry Salary Comparison, 2018	40
Figure 4.16 Per Capital Income	21	Figure 6.3 Caldwell County Employment Change by Occupational Group, 2014–2019	41
Figure 4.17 Poverty	22	Figure 6.4 Caldwell County Average Annual Occupational Salary Comparison, 2018	43
Figure 4.18 Cost-of-Living-Index, 2019	22	Figure 6.5 Caldwell County Industry Specialization & Growth	46
Figure 4.19 Crime Rates per 10,000 Residents	23	Figure 6.6 Caldwell County Occupational Specialization and Growth	48
Figure 4.20 AUS Passenger Traffic.....	23	Figure 7.1 Optimal Target Screening Process	49
Figure 4.21 Access to Broadband Internet by Speed level, 2019.....	24	Figure 7.2 Optimal Targets	50
Figure 4.22 Top 10% of Download Speeds, 12-months ending Feb 2020..	24	Figure 8.1 Recommendation Categories	67

List of Tables:

Table 4.1 Population, 2008–2018.....	13	Table 7.1 Regional Degree Completions Mfg.	52
Table 4.2 Race and Ethnic Origin Population, 2018.....	15	Table 7.2 Target Employment, Change and Wages, United States 2019...	52
Highest Rate in Each Group Shaded	15	Table 7.3 Key High-Demand Occupations for Target, Austin Metro 2019.	53
Table 4.3 Current Residents Who Moved from Outside County, State or Abroad, 2018.....	16	Table 7.4 Skills Transferability Key Target Occupations, 2019.....	54
Table 5.1 Labor Force & Employment Status, 2018*.....	25	Table 7.5 Regional Degree Completions Food Processing.....	56
Table 5.2 Current Labor Force & Employment, January 2020	26	Table 7.6 Target Employment, Change and Wages, United States 2019...	56
Table 5.3 Labor Force Participation of Families, 2018.....	27	Table 7.7 Key High-Demand Occupations for Target, Austin Metro 2019.	57
Table 5.4 Job Growth	32	Table 7.8 Skills Transferability Key Target Occupations, 2019.....	58
Table 5.5 Average Annual Wage Growth	32	Table 7.9 Regional Degree Completions Logistics	60
Table 5.6 Industry Sector Composition, 2018.....	34	Table 7.10 Target Employment, Change and Wages, United States 2019.	60
Table 5.7 College & University Enrollment, 2018 (45-Minute Drive Time .	35	Table 7.11 Key High-Demand Occupations for Target, Austin Metro 2019	61
Table 5.8 Credentials Granted by Area of Study, 2018.....	36	Table 7.12 Skills Transferability Key Target Occupations, 2019.....	62
Table 6.1 Employment Change by Major Industry, 2013–2018.....	38	Table 7.13 Regional Degree Completions Pharma	64
Table 6.2 Average Annual Industry Salary Comparison, 2018	39	Table 7.14 Target Employment, Change and Wages, United States 2019.	64
Table 6.3 Employment Change by Major Occupational Group, 2013–2018	42	Table 7.15 Key High-Demand Occupations for Target, Austin Metro 2019	65
Table 6.4 Average Annual Occupational Salary Comparison, 2018	44	Table 7.16 Skills Transferability Key Target Occupations, 2019.....	66
Table 6.5 Industry Specialization and Growth	45		
Table 6.6 Occupational Specialization and Growth	47		

Appendix E: Assets & Challenges Notes

¹ 400-Mile Radius Results

<u>Geography Name</u>	<u>Year</u>	<u>Total Population</u>
Radius Region	2019	32,916,190

Source: U.S. Census Bureau

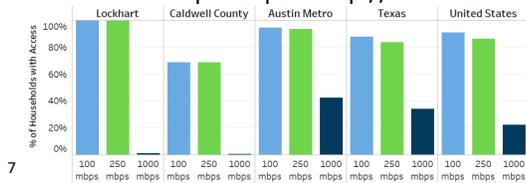
² FTZ #183

Highways
I-35 (16 miles from Lockhart)
I-10 (17 miles from Lockhart)
U.S.-183 (0 miles from Lockhart)
SH 130 (0 miles from Lockhart)

⁴ Served by Union Pacific Railroad

⁵ Austin Bergstrom International Airport is 26 miles, or approximately 24 minutes from Lockhart, according to Google maps.

⁶ Lockhart Municipal Airport <http://www.airnav.com/airport/50R>



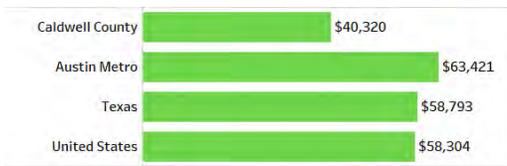
⁸ Location Quotient (LQ) of .93 or 602 jobs

⁹ LQ of .77 or 1198 jobs

¹⁰ LQ of .31 or 99 jobs

¹¹ LQ of 1.67 or 1124 jobs

¹² Average Annual Wage, 2019



Source: Bureau of Labor Statistics, Garner Economics. Comparable data for Lockhart was not available. Figures adjusted for inflation.

¹³ Austin Community College is the nearest at 26 miles from Lockhart. Gary Jobs Corp in San Marcos. Austin Community College has a training program for the incarcerated at the Lockhart Correctional Facility. No training facilities in Lockhart proper.

¹⁴ 5 postsecondary schools in the region

San Marcos

Texas State University, San Marcos (18 miles from Lockhart)

Austin

Austin Community College (26 miles from Lockhart)

Huston-Tillotson College (28 miles from Lockhart)
St. Edward's University (30 miles from Lockhart)
The University of Texas at Austin (31 miles from Lockhart)

¹⁵ 2 FTEs as of 4/1/2020 (a director and economic specialist)

¹⁶ Based on interview feedback

¹⁷ This current effort undertaken by Garner Economics is the first entry into developing an economic development action plan by the City, according to the EDC.

¹⁸ The Lockhart business climate survey showed a serious disconnect between the City's permitting process and the balance needed to grow business investment.

¹⁹ 2019 revenue budget of \$1mm

²⁰ Five sites in the EDC's inventory of available properties ranging from a few acres to 1,800 acres. Some are not under municipal control or have full utility infrastructure in place.

²¹ <https://lockhartedc.com/incentives>

²² Ibid.

²³ Ibid.

²⁴ Ibid.

²⁵ 1.55 MGD of water storage capacity; total credited capacity is 8.4 MGD; wastewater capacity at 2.6 MGD and peak flows at 8.5 MGD. Currently at 46% capacity.

²⁶ Per feedback from survey respondents

²⁷ <https://lockhartedc.com/incentives>

²⁸ Lockhart Independent School District (ISD) had the lowest scores compared to Caldwell County, state, and national performance. ACT scores have only recently dipped below the county as a whole, but the trend shows composite scores dropping.

²⁹ Per feedback from survey respondents

³⁰ Caldwell County has the lowest median residential property tax of any other county in the Austin MSA (Bastrop, Caldwell, Hays, Travis, and Williamson) <http://www.tax-rates.org/texas/property-tax>

³¹ Ten listings on Zillow of houses for sale in excess of \$300K, as of 4/24/2020

³² Forty listings on Zillow of houses for sale from \$125K–\$299,999, as of 4/24/2020

³³ Twenty-nine apartments available within Lockhart, according to Apartments.com, as of 4/24/2020

³⁴ See page 23 for additional information

³⁵ See page 24 for additional information

³⁶ <https://lockhartedc.com/quality-life>

³⁷ Ibid.

³⁸ There is no hospital in Lockhart

³⁹ Limited properties in Lockhart <http://www.lockhartchamber.com/list/category/hotels-motels-68>

⁴⁰ Lockhart promotes itself as the barbeque capital of Texas. <http://www.lockhartchamber.com/list/category/barbecue-143>