



Lockhart's Next Chapter: A Targeted Business Strategy Refresh

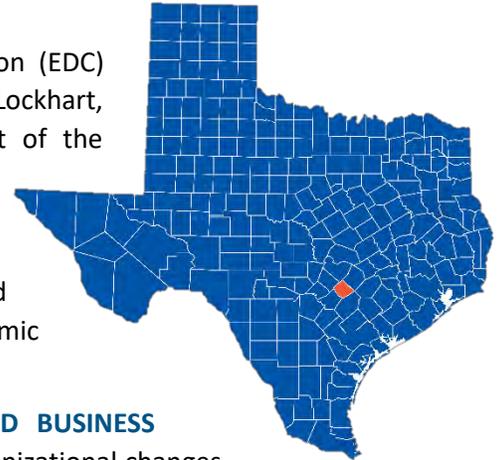
Prepared for the City of Lockhart & the Lockhart Economic Development Corporation
April 2023 (edited May 2023)

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Executive Summary

In February 2023, the City of Lockhart Economic Development Corporation (EDC) retained Garner Economics, LLC to update the Target Industry Strategy for Lockhart, Texas. In 2020, Garner Economics conducted the City’s first assessment of the community’s economic development competitiveness and service delivery. This resulted in a road map to enhance economic development efforts detailed in an action plan published in August of that year. Three years after the original report, Garner Economics was asked by the City to refresh and recalibrate this economic development action plan based on its recent economic development successes.



This updated strategy, titled **LOCKHART’S NEXT CHAPTER: A TARGETED BUSINESS STRATEGY REFRESH**, provides renewed focus on asset development and organizational changes Lockhart and its economic development partners should take to keep the City on a trajectory of success. This strategy will help Lockhart attract and retain businesses, create jobs, and nurture opportunities to attract talent.



The 2023 Lockhart study effort included:

- An **ASSETS & CHALLENGES ASSESSMENT** of Lockhart compared to the 2020 review, all from the perspective of a site-location consultant that facilitates investment decisions;
- A thorough update and assessment of key forces driving the economy and its shifting dynamics;
- Validation and recommendations for business targets suitable for the City and its partners to pursue, based on our research and analysis; and finally,
- A review of recommendations from the previous, 2020 plan and a recalibration of strategy resulting in a set of implementable recommendations that the City of Lockhart can use to enhance the economic well-being of the area.

Lockhart Progress Report Card

Garner Economics created a roadmap for the City of Lockhart to generate economic opportunities in 2020. These actionable recommendations helped ensure Lockhart and its partners could attain the goal of increasing its competitive advantage in business development and economic growth. Since 2020, the Lockhart EDC has been working to move the city forward toward this goal and has made evident progress with a majority of the recommendations. The table below summarizes progress with additional details in chapter 2 of this report.

# of 2020 Recommendations	Status Indicator	Status
5		Started/In progress
1		On-going
1		Not Started

Assets & Challenges Assessment

The **ASSETS & CHALLENGES ASSESSMENT** (A&C) is an important part of Garner Economics’ approach to the evaluation of a community. The A&C includes both an objective and subjective appraisal of the area obtained through a windshield tour and reviewing the area from a site-selection perspective. For this report, Garner Economics once again visited and assessed Lockhart based on the qualities, elements, and infrastructure that a business will look for when considering the city as a place for its operations. A comparison of 2020 and 2023 showed that Lockhart improved in the number of positive ratings as well as fewer challenges since 2020.

Chapter 3 outlines the specific items evaluated and the full comparison.

Economic & Community Assessment

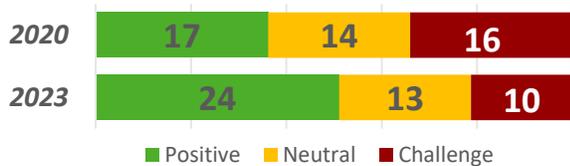
Additionally, Lockhart’s economic position and competitiveness were reassessed with the same analytical and data-driven rigor as the original strategy. The City of Lockhart and Caldwell County were assessed by measuring the change and comparing it to itself over time as well as to the benchmarks of the Austin Metro, Texas, and the United States.

As a complement to the Assets & Challenges Assessment work, the team examined data sets that reveal the area’s relative position and were rated showing positive, neutral, or negative indicators. As some indicators and measures change to reflect access to new data sets or emerging trends, comparisons between 2020 and 2023 are reflected as a percentage of the total number of ratings. Lockhart has fewer challenges in 2023 (14% compared to 17%), but a higher percentage of neutral indicators and fewer positive indicators.

The ratings presented below are included in further detail in chapters 4-5 with a complete industry analysis in chapter 6.

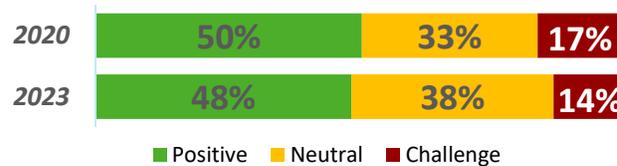
Comparison Summary

Assets & Challenges Rating Comparison 2020-2023



Details on the Assets & Challenges Assessment and comparison can be found in chapter 3.

Economic & Community Comparison 2020-2023



A comprehensive report on the Economic & Community analysis can be found in chapters 4-5.

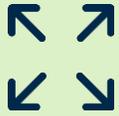
Target Business Sectors

Driven by desirability and feasibility screening, four target business families are recommended as a good fit for Lockhart based on the current economic and business climate conditions. Garner Economics worked to validate existing targets, look for new opportunities, and group business sectors in target families that are thematically similar or leverage the same assets in the area.

Together, the targets will help the City continue to grow and diversify its economic base, as well as mitigate identified challenges across the various indicators reviewed in the **ASSETS & CHALLENGES ASSESSMENT**. The target families are recommended given Lockhart’s attributes, assets, and proximity to other economic drivers.

Each target group is outlined in chapter 7 of this report with a target profile containing valuable data and a narrative outlining the rationale. The target families are *All Things Mega*, *Industry 4.0 (Manufacturing)*, *Food Processing*, and *Experience Lockhart*.

Optimal Business Sectors for Lockhart

All Things Mega	Industry 4.0	Food Processing	Experience Lockhart
			
Ideal Large-Scale Manufacturers	Auto Parts, Metal & Electronic Mfg.	Food & Beverage Manufacturing	Experiential Tourism & Hospitality

Recommendations

In conducting this analysis, the Garner Economics team found that Lockhart has been successful with actionable improvement since the first Garner Economics strategic plan in 2020. The City is well poised to further set itself apart and continue to grow; however, actions must be taken to be proactive in driving the community’s economic future and setting it apart from peers and competitors.

Chapter 8 offers a set of implementable recommendations that will help Lockhart and the EDC focus efforts to attract high-quality companies *and* talent. These recommendations call on Lockhart to enhance its economic development service delivery and advocate for initiatives that will build upon and improve available product offerings and the overall business climate. By highlighting its unique advantages and existing assets, Lockhart can shape its economic future and encourage the business and talent growth the community desires.

Summary of Recommendations for Lockhart in 2023

Category		Action
	<p>Asset Development</p> <p><i>Product Improvement</i></p>	<ol style="list-style-type: none"> 1. Continue the City’s efforts to grow its industrial land inventory to accommodate the needs of the targeted industry sectors. 2. Enhance Lockhart’s Quality of Place by developing assets needed to enhance the City’s quality of life (hotel recruitment).
	<p>Execute Effectively</p> <p><i>Organizational</i></p>	<ol style="list-style-type: none"> 1. Create a Convention and Visitor’s Bureau (CVB) in Lockhart focused on visitor recruitment and hospitality product.

Chapter 2: Lockhart Progress Report

Garner Economics had the privilege of working with the Lockhart Economic Development (Lockhart EDC) in 2020 to help create a roadmap for the organization to generate economic opportunities for its citizens. The end goal of the **TARGET INDUSTRY STRATEGY** was to understand where the City of Lockhart stood, what economic development opportunities were available, and to create a set of actionable recommendations to ensure the Lockhart EDC and its partners could attain its goal of increasing its competitive advantage in business development and economic growth by recruiting the recommended targeted industry sectors.

In addition to conducting an Assets and Challenges assessment to quantify the improvement in Lockhart’s competitiveness, Garner Economics reviewed the implementation of the original strategy recommendations with the Lockhart EDC. Since 2020, the City has made marked progress in working on the majority of the recommendations. The tables below illustrate the progress Lockhart has made in implementing the 2020 strategy recommendations.

2020 Recommendations

Asset Development/Execute Effectively

1. **Develop the City’s sites and buildings inventory.**
2. **Create a culture of “yes” within the City’s permitting and regulatory process.**
3. **Develop and sustain a coordinated effort for workforce training.**

Table 2.1 Lockhart Progress Report for 2020 Recommendations

I. Asset Development/Execute Effectively		
Develop the City’s sites and building inventory for the recommended target industry sectors		
Recommendation	Status	Notes from the EDC
Acquire a site of 100+ acres to develop the next publicly held industrial park.		In 2021 LEDC closed on a 75-acre parcel and began development of an industrial park. To date, the park has 1 operational tenant on 10 acres and has 167,000 SF under construction due to be completed in 2023. Infrastructure construction is ongoing and is slated to be completed in May 2023. Although the size of 100+ acres was not met, the part and effort still satisfy this goal.
Develop a 50,000 sq. ft. industrial shell/spec building, expandable to 100,000 sq. ft.		Once the infrastructure is done in the industrial park, all parcels should close with purchasers ranging from a 100,000 SF food manufacturer, a 50,000 SF speculative building, and a plastics recycler/fuel producer.

 Not Started
  Started/In progress
  Partially Complete
  Complete
  On-going

I. Asset Development/Execute Effectively <i>(continued)</i>		
Create a culture of “yes” within the City’s permitting and regulatory process		
Recommendation	Status	Notes from the EDC
Perform regulatory introspection for real or perceived challenges		Since the 2020 strategic plan, the City of Lockhart has hired a new planning Director and a new building inspector. Both individuals bring fresh eyes to the organization and are in process of modernizing the department for better and faster processes.
If challenges are perceived, better communicate Lockhart’s regulatory system or if challenges are real, conduct a deep dive into processes and focus on continuous process improvement.		
Workforce Training		
Recommendation	Status	Notes from the EDC
Explore a joint venture to offer postsecondary vocational training at an ISD facility, either in partnership with Austin Community College or Texas State Technical College.		This has started but only in a very limited way. LEDC is working with Lockhart ISD on its 5-year strategic planning process which has vocational/CTE/ACC aspects to the plan. Additionally, members of the community have begun to look at what it would take to bring Lockhart into ACC’s district.

Not Started
 Started/In progress
 Partially Complete
 Complete
 On-going

Communicate the Brand

1. Conduct an external outreach to companies and consultants.
2. Create a lead-generation program.

II. Communicate the Brand		
Recommendation	Status	Notes from the EDC
Call on location advisors and companies within the identified Target Industries		LEDC has completed the setup for marketing and efforts are ongoing.
Engage a marketing firm to provide lead-generation services		LEDC still works with Opportunity Austin and the Greater San Marcos Partnership to generate leads and provide outreach and has done so for 19 and 12 years respectively. LEDC has not done anything to create a lead-generation program for its own use.

Not Started
 Started/In progress
 Partially Complete
 Complete
 On-going

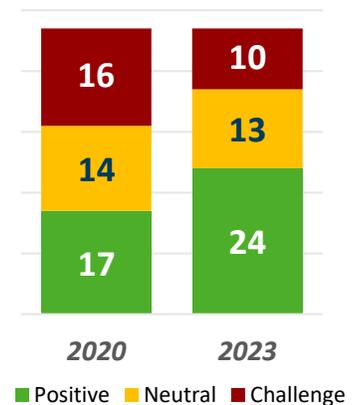
Chapter 3: Assets & Challenges

The **ASSETS & CHALLENGES ASSESSMENT** (A&C) is an important part of Garner Economics’ approach to the evaluation of a community. The A&C includes both an objective and subjective appraisal of the area obtained through a windshield tour and reviewing the area from a site-selection perspective. The City had previously gone through a detailed, predetermined list of 47 evaluation criteria and a community tour during the 2020 study, and again during a prospect site visit by Garner Economics in 2021.

For this report, Garner Economics once again visited and assessed the city based on the qualities, elements, and infrastructure that a business will look for when considering the city as a place for its operations. A comparison of 2020 and 2023 showed that Lockhart improved in the number of positive ratings as well as fewer challenges since the 2020 report.

This assessment allows us to document challenges that exist in the city that constitute potential barriers to successful economic development to occur. By knowing what challenges or gaps exist, the City, the EDC and its partners can take the steps necessary to mitigate the situation, strengthen its overall “product,” and be a more attractive business location. In the tables below, a 🟢 indicates a change from the previous assessment.

Assets & Challenges Rating Comparison 2020-2023



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 the city 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.

Table 3.1 Lockhart Assets & Challenges Comparison

Category	Attribute	2020 Rank	2023 Rank
Access to Markets	Centrally located for major regional market	🟢	🟢
	Centrally located for national market	🟢	🟢
	Well-positioned to serve international markets	🟢	🟢
	Interstate highways accessibility	🟡	🟡
	Rail service	🟡	🟡
	Within 1 hour of commercial air passenger service	🟢	🟢
	General aviation airport capable of handling corporate aircraft	🟡	🟡
	Broadband availability and speeds	🟡	🟡
Labor	Availability of skilled production workers	🟡	🟡
	Availability of skilled administrative workers	🔴	🔴
	Availability of computer and mathematical specialists	🔴	🔴
	Availability of managerial personnel	🟢	🟢
	Cost of labor (Caldwell County)	🟢	🟢
	Availability of post-secondary vocational training	🔴	🔴
	Within 1/2 hour of major university/college	🟢	🟢

Category	Attribute	2020 Rank	2023 Rank
City Economic Development Program	Adequate level of professional staff	→	→
	Involvement of both public and private sectors	↓	↓
	Local economic development organization has a strategic plan	↓	↑
	Level of cooperation between various organizations involved in economic development activity	↓	→
	Level of funding for local economic development program	↑	↑
Access to Space	Availability of fully served and attractive flex sites	→	↑
	Availability of fully served and attractive office sites	↓	↓
	Availability of suitable flex space (buildings.)	↓	↑
	Availability of suitable office space (Class A and B space)	↓	↓
Access to Capital	Availability of tax-exempt financing for new industrial facilities	↑	↑
	Availability of low-interest loans for small business	↑	↑
	Availability of funding for business startups or early-stage funding	↑	↑
	Any other type of financing available through the City for business activity growth and retention?	↑	↑
Government Impact on Business	Availability/capacity of water and wastewater treatment	↑	↑
	Availability of adequate water and sewer lines to commercial sites	→	→
	Condition and maintenance of local streets	↓	↓
	Availability and type of local incentives	↑	↑
	Secondary school performance (SAT/ACT scores)	↓	↓
	Business permitting procedures and costs	↓	↑
	Median property taxes by county (Caldwell)	↑	↑
Quality of Place	Availability of executive-level housing	↓	↓
	Availability of moderate-cost housing	→	↑
	Availability of apartments	↓	↑
	Cost of living index	↑	↑
	Level of crime	↑	↑
	Level of cultural activity	→	→
	Availability of recreational opportunities	→	→
	General appearance of the community	→	→
	Availability of adequate medical facilities	↓	↑
	Availability of first-class hotels, motels, and resorts	↓	↓
	Variety of local restaurants	→	→
	Appearance of the Central Business District(s)	→	→

★ Changed ratings

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 is 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 2023) is used. Garner Economics conducted all unique calculations and computations from the original data. For several data points, city-level data were not available and either Caldwell County or Austin Metro were used for those indicators.

Measurements included

- Population Trends
- Age
- Diversity
- Migration/Geographic Mobility
- Educational Attainment
- Secondary School Graduation Rate
- Test Scores
- Household Income
- Poverty
- Crime Rate
- Cost of Living
- Broadband Access & Speed
- Walk & Bike Scores



Similar to the Assets & Challenges Assessment, metrics analyzed in chapters 4 and 5 were graded showing positive, neutral, or negative indicators. These graphic markers relay the analysis of the measure compared to the benchmarks, change over time, or both. Neutral grades generally resulted when there were both negative and positive aspects of these factors.



↑ Population Trends

Table 4.1 Population, 2011-2021

Geography	2021	2011-2021 Change	2011-2021 % Change
Lockhart	14,844	2,036	15.9%
Caldwell County	46,791	8,321	21.6%
Austin Metro	2,352,426	571,891	32.1%
Texas	29,527,941	3,882,312	15.1%
United States	331,893,745	20,336,871	6.5%

Figure 4.1 Population Growth, 2011-2021

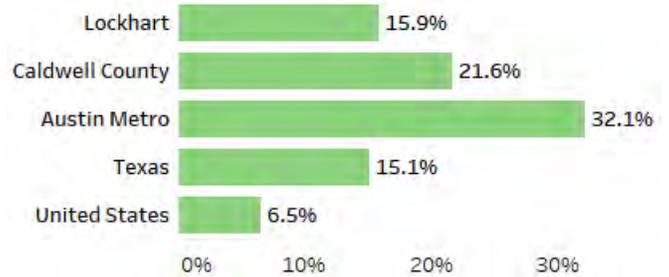
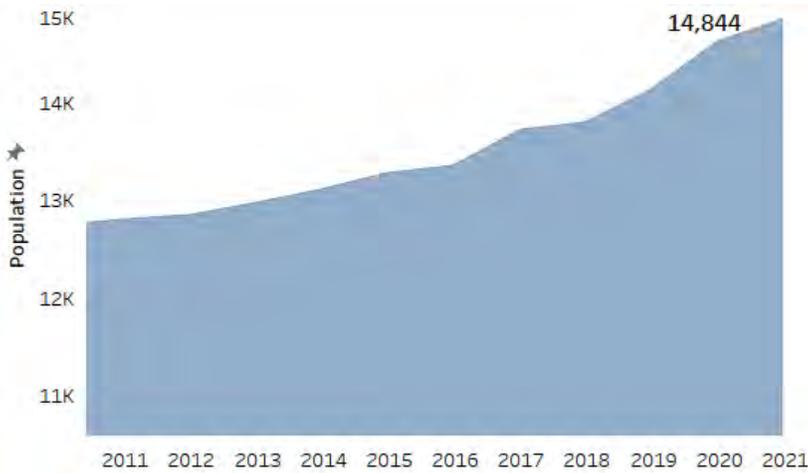


Figure 4.2 Lockhart Population Growth, 2011-2021

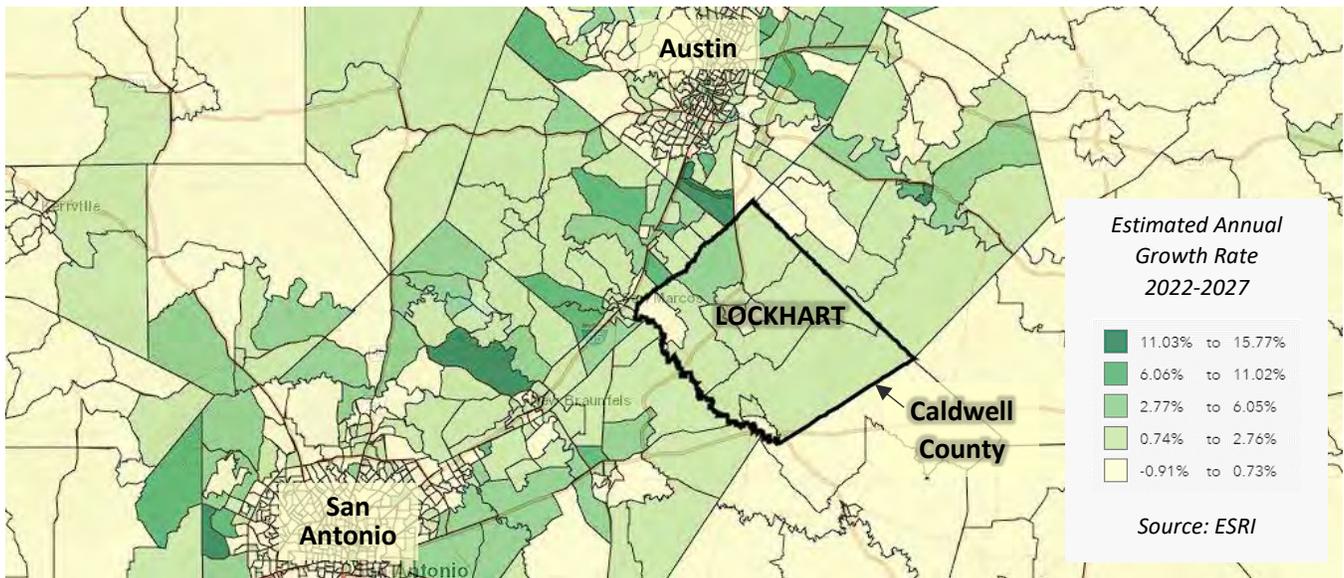


Source: US Census Bureau Population Estimates, Garner Economics

Population growth 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 a major consideration in site-selection decisions.

The City of Lockhart is growing at a steady rate increasing nearly 16% over ten years. This is double the nation’s growth and on par with the state but behind Caldwell County as a whole, and the Austin Metro. The growth of the Austin and San Antonio metro areas has accelerated in past years and encompasses most of Caldwell County surrounding Lockhart.

Figure 4.3 Estimated Annual Growth Rate for Austin and San Antonio Regions, 2022-2027



Age Distribution

Figure 4.4 Age Distribution & Median Age, 2021



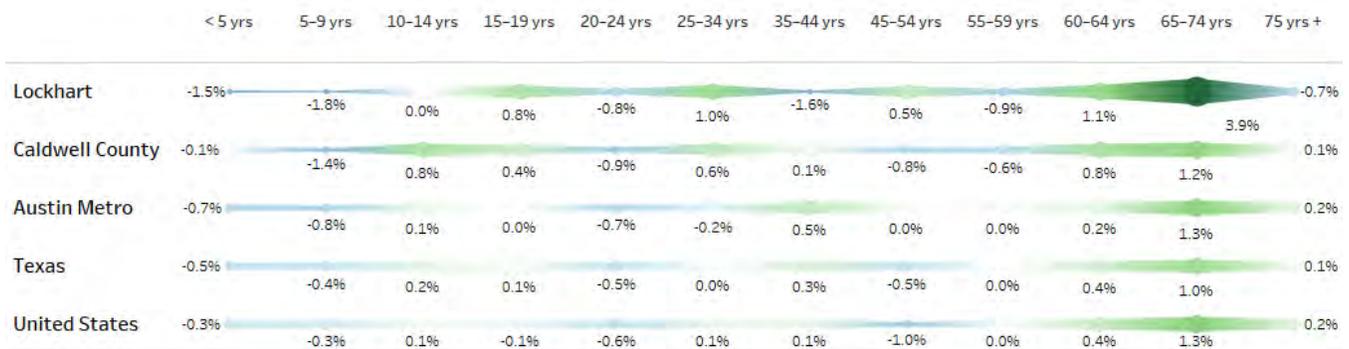
Source: US Census Bureau, Garner Economics

Evaluating the age composition of an area’s population is a significant factor in site selection as it is a key component for the current and future labor force. 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. Nationally, and indeed globally, the median age is getting older and Lockhart shows the highest median age among all benchmarks at 38.8 years, just behind the national median of 38.4 years.

Lockhart's largest age group is those aged 25–34 years (16%), trailing the Austin Metro by one percentage point. Caldwell County overall has a lesser concentration of younger people with the population more evenly between 25 and 54 years, similar to Texas and the United States. All geographies have a spike of 65-74 year-olds compared to those aged 55-59 years and those 75 years and older. Lockhart had the highest growth rate of 65-74-year-olds between 2016 and 2021 at 3.9%. Positive growth also occurred with the 25-34 years group as well as those 15-19 years old and 45-54 years old.

➔ Change in Age Distribution

Figure 4.5 Change in Age Groups as a Percentage of Total Population, 2016–2021



Source: US 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. There is also a growing recognition that being welcoming leads to prosperity. Talent attraction and retention are key factors in economic development today and companies, as well as communities, are embracing equity, diversity, and inclusion.

The Diversity Index captures the racial and ethnic diversity of a geographic area in a single number, from 0 to 100. The diversity index measures the likelihood that two people chosen at random in a given area will be from different races and ethnic groups. Values close to 100% indicate that people in the population have different racial and ethnic groups.

The City of Lockhart is a diverse community with a diversity index in 2022 of 82.1 out of 100 and is growing more diverse, increasing by 10.5 points since 2010. Caldwell County as a whole and Texas are slightly higher in 2022, however, all geographies increased their index numbers more than Lockhart between 2010 and 2022. Texas is the leader in diversity among benchmarks, but Caldwell County had the highest climb between 2010 and 2022 in this measure.

**Table 4.2 Diversity Index
Highest Diversity Shaded**

	Lockhart	Caldwell County	Austin Metro	Texas	United States
2010 Diversity Index	71.6	70.0	68.6	72.3	60.2
2020 Diversity Index	81.9	82.1	78.6	83.3	71.0
2022 Diversity Index	82.1	82.4	79.1	83.7	71.6
2010-2022 Change	10.5	12.4	10.5	11.4	11.4

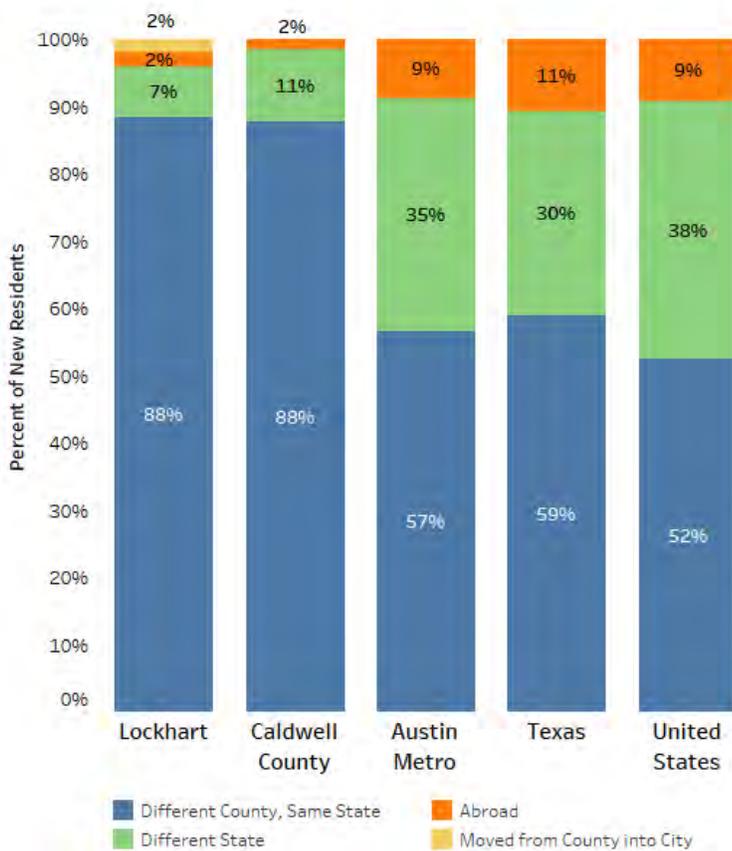
Source: ESRI, Garner Economics

➔ Migration/Geographic Mobility

Table 4.3 Source of Residents Who Moved into Current City/County within Past Year, 2021

Category	Lockhart	Caldwell County	Austin Metro	Texas	United States
Total Residents Who Moved in Past Year	1,619	5,427	400,549	4,237,650	43,820,703
Movers as % of Total Population	11%	12%	18%	15%	13%
Estimated New Residents	1,117	4,197	192,526	1,815,461	19,584,161
New Residents as % of Total Population	8%	9%	9%	6%	6%

Figure 4.6 Current Residents Who Moved from Outside Lockhart, 2021



1,095

Moved into the City of Lockhart in Past Year

8%

New Residents as % of Total Population

Source: US Census Bureau, Garner Economics

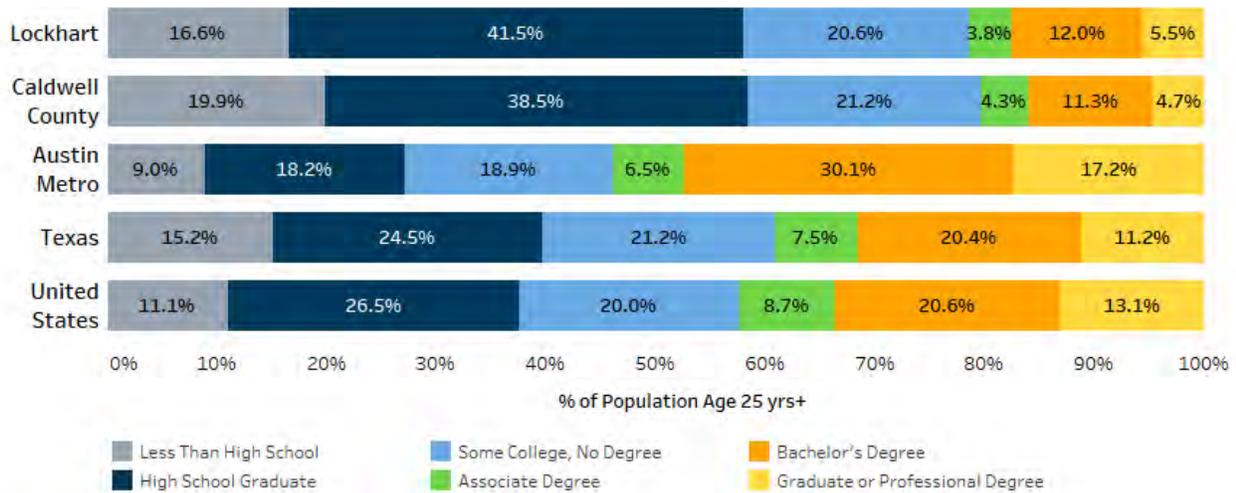
Since talent is at the center of most site selection and business operations, attracting new residents from a diversity of outside locations can reflect a city’s broader appeal and add to the existing talent pipeline. This measure reflects the population that has moved within the past year, which is an indicator of new residents **but shows incoming residents, not net migration.**

Lockhart has a close relationship with the Austin-Round Rock Metro and other Texas counties when it comes to migration. Lockhart gained an estimated 1,117 people who moved into the city in the last year from outside city limits. A small percentage (2%) moved from elsewhere in Caldwell County based on Census estimates. Approximately 500 people moved but stayed with the City of Lockhart. Previous limitations of housing options may have hindered additional residents from finding homes inside city limits. New housing options in Lockhart are now significant.

Most of Lockhart and Caldwell County’s migrating residents are from Texas (88%) with only 7% moving from a *Different State*. Lockhart gains only 2% of its incoming migration from *Abroad* which could include U.S. citizens returning from service or extended work assignments. New residents make up about 8% of the total population.

➔ **Educational Attainment**

Figure 4.7 Educational Attainment, 2021



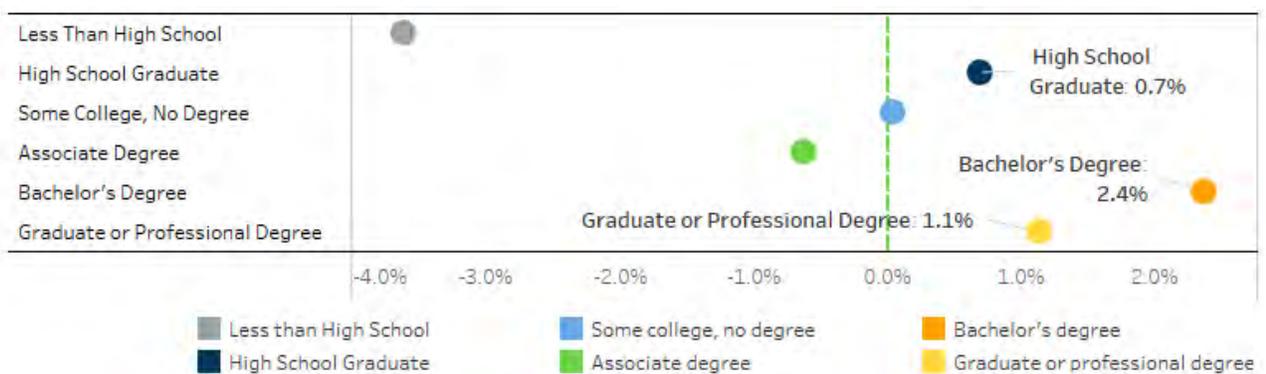
Source: US Census Bureau, Garner Economics

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 25 years or older is 83% High School educated, the lowest of benchmarks except for Caldwell County. Approximately 42% of Lockhart’s population has at least some post-secondary education. However, Lockhart and Caldwell County are below all other benchmarks for those holding a Bachelor’s or higher degree. All areas show a similar level of Associate degree holders at approximately 19-21%.

➔ **Change in Educational Attainment**

Figure 4.8 Change in Educational Attainment as a Percentage of Total Population, 2016–2021



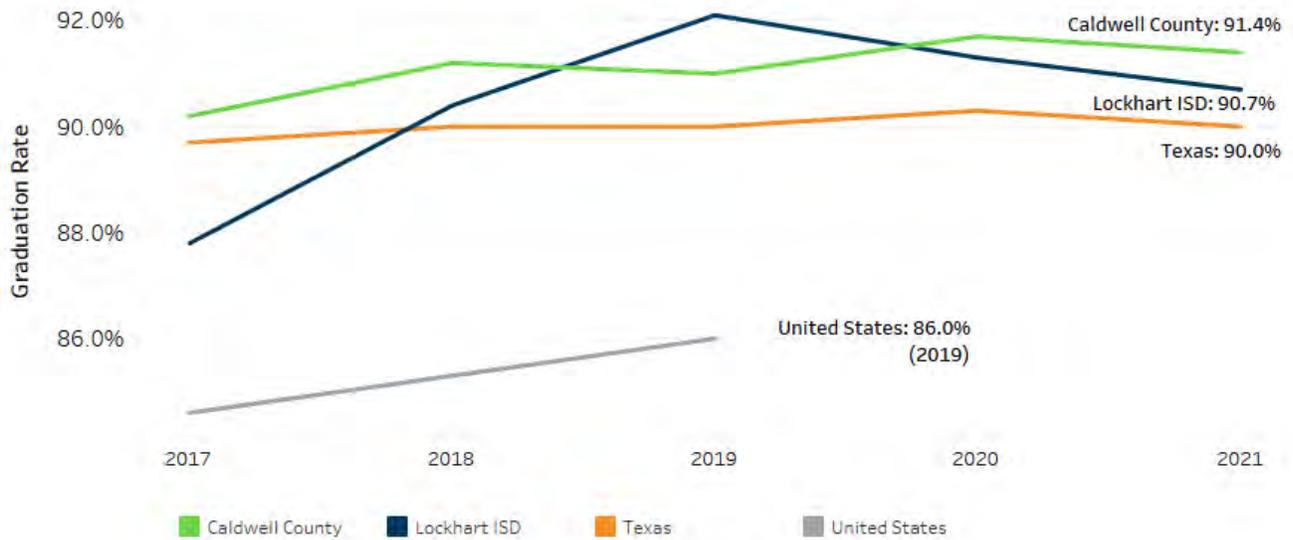
Source: US Census Bureau, Garner Economics

Percentage points gained or lost for educational categories indicates some positive changes including the rise in the percentage of those with Graduate or Professional degrees (1.1%) and Bachelor’s degrees (2.4%). Of concern was Lockhart’s decline in those obtaining an Associate Degree since that is a key element in many technical fields.

Secondary School Performance: Graduation Rates

An indicator of success of the local public school system is the share of high school students that graduate within four years of beginning ninth grade. This four-year graduation rate is an important measure of local public schools as well as the education level of future workers. Lockhart Independent School District (ISD) has a graduation rate above that of Texas in 2021, but just below Caldwell County as a whole. Lockhart ISD’s graduation rate has risen since 2017, however, the effects of COVID-19 may have affected this continued increase. The graduation rate for 2021 is still far above 2017 levels, an increase of nearly 3%. Lockhart ISD has consistently performed better than the national average graduation rate which is not yet available for recent years.

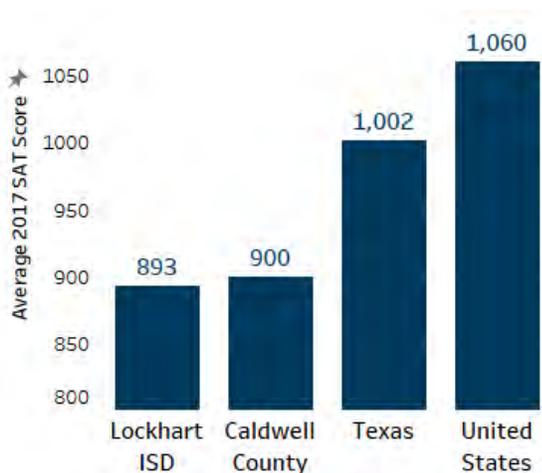
Figure 4.9 Graduation Rate (4-Year Cohort), 2017–2021



Source: Texas Education Agency, National Center for Education Statistics, Garner Economics

Secondary School Performance: Test Scores

Figure 4.10 Average SAT Scores, 2021



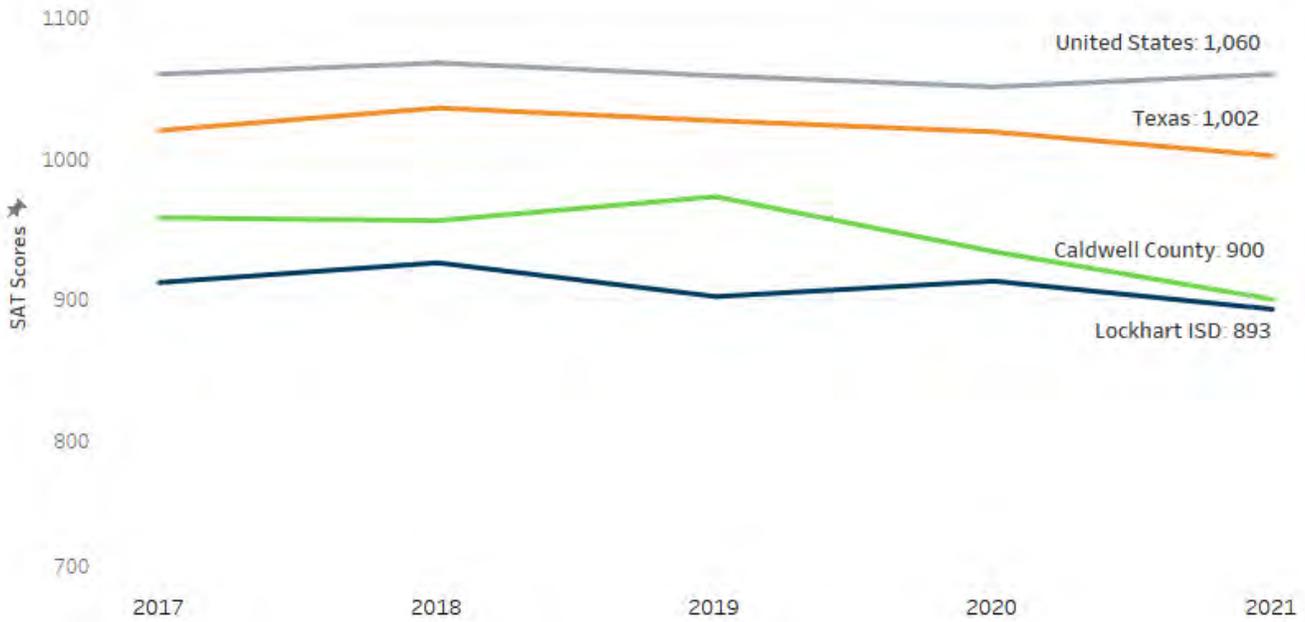
Source: Texas Education Agency, College Board, Garner Economics

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 widely accepted as a measure of education quality.

There are three school districts in Caldwell County: Lockhart ISD, Luling ISD, and the Prairie Lea ISD. The districts have higher student participation rates with the SAT than with the ACT. For instance, the percentage of students from Lockhart ISD taking the ACT in 2021 was 1.6%. The SAT will be the sole test for measuring student achievement and college readiness in this report. Lockhart Independent School District (ISD) had the lowest scores compared to Caldwell County, state, and national performance.

Secondary School Performance: Test Scores (continued)

Figure 4.11 Composite ACT Scores, 2017-2021



Source: Texas Education Agency, College Board, Garner Economics

Per Capita Income

In Lockhart, the Per Capita Income, or the average income for every person in the city, is \$26,361 for 2021. This is just below Caldwell County, but significantly less than all other benchmarks. Adjusted for inflation, the per capita income in 2016 was \$23,249 for the city. Lockhart did have the second-highest percent change between 2016 and 2021 increasing by 13.4%, behind the Austin Metro’s 15.9% growth for the same period.

Figure 4.12 Per Capital Income (2021 dollars)

	2016	2021	Change 2016-2021
Lockhart	\$23,249	\$26,361	13.4%
Caldwell County	\$24,376	\$27,202	11.6%
Austin Metro	\$38,680	\$44,830	15.9%
Texas	\$31,572	\$34,255	8.5%
United States	\$33,842	\$37,638	11.2%

Source: US Census Bureau, 2016 adjusted for inflation, Garner Economics

Household Income

Figure 4.13 Household Income Distribution & Median Household Income, 2021



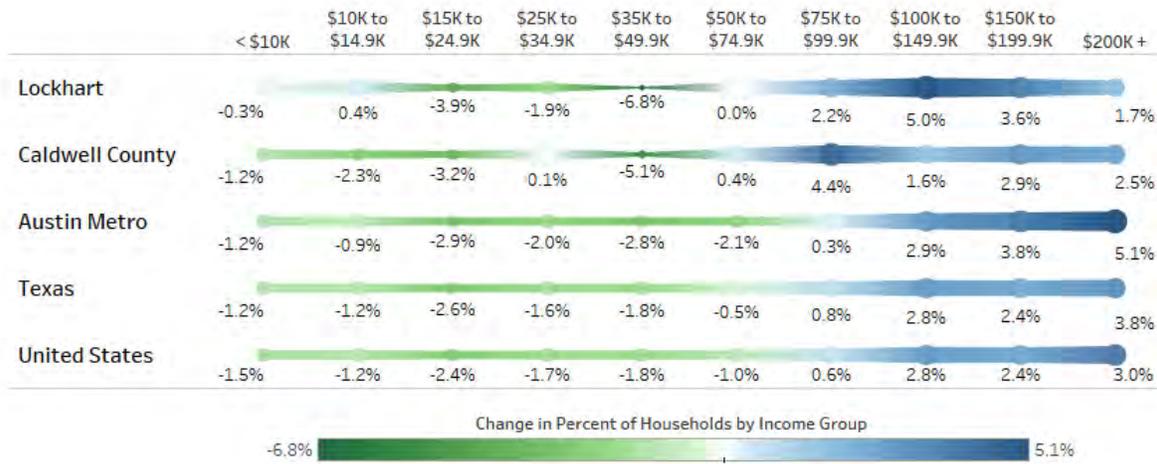
Source: US Census Bureau, Garner Economics

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 per year (23%) and the second-highest level earning \$100,000 to \$149,999 per year (21%). Caldwell County household incomes are also concentrated in the middle-income levels with the top percentage of households earning between \$75,000 to \$99,999 annually. The Austin Metro shows a much wealthier profile overall with 22% of households earning \$100,000 to \$149,999 per year and 18% crossing the \$200,000 or more mark. Household income at the state and national levels illustrates more households earning \$100,000 to \$149,999 annually, more than all other income levels.

Lockhart has a median household income of \$64,633 annually, higher than Caldwell County as a whole, but behind all other benchmarks. The Austin Metro’s median household income of \$85,398 per year far exceeds all median incomes in comparison.

Change in Household Income

Figure 4.14 Change in Household Income Distribution, 2016–2021

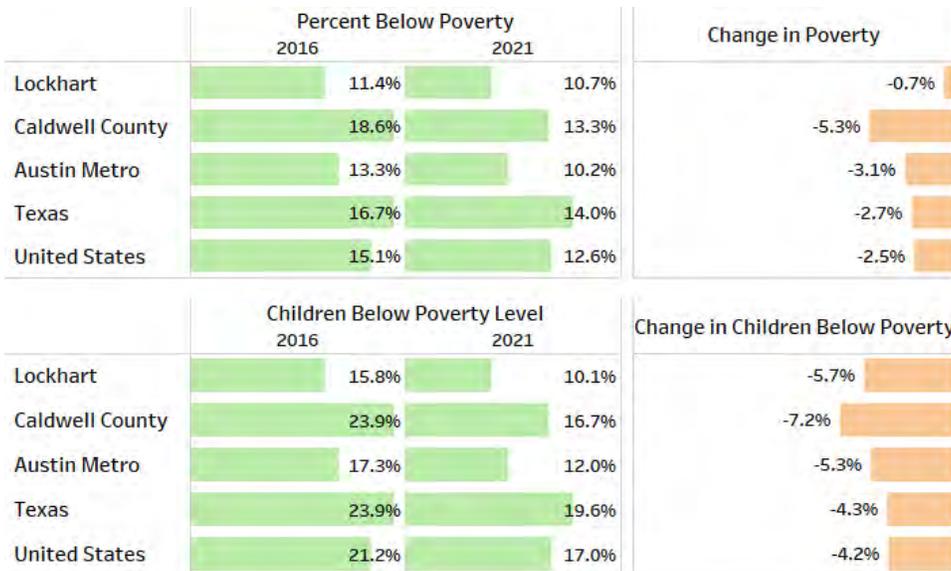


Source: US Census Bureau, Garner Economics

Overall, households were earning more in 2021 with all geographies showing an increase in the percentage of households earning \$75,000 or more. Lockhart had significant growth in households earning \$100,000 to \$149,999 per year (5%) as well as a 3.6% growth of incomes at \$150,000 to \$199,999 per year. The change between 2016 and 2021 shows the Austin Metro’s households earning \$200,000 or more grew significantly increasing by 5.1%.

Poverty

Figure 4.15 Poverty



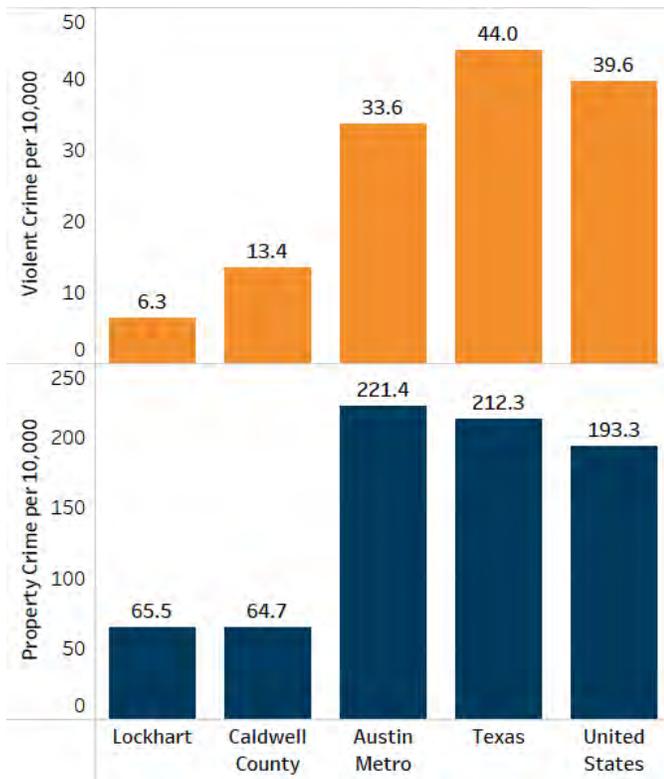
The measurement of poverty in a community helps to evaluate the well-being of the citizens and the state of the economy. In 2021, Lockhart’s poverty rate (10.7%) was slightly higher than the Austin Metro but lower than all other benchmarks. The poverty rate for children under 18 is lower than the general poverty rate and below all other areas.

The City of Lockhart decreased the level of poverty by 5.7% for children under 18 comparing 2016 to 2021.

Source: US Census Bureau, Garner Economics

↑ Crime Rates

Figure 4.16 Crime Rates per 10,000 Residents, 2021



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 low crime rates for both violent and property crimes in 2021.

The *Violent Crime Rate* shows only 6.3 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 65.5 crimes reported per 10,000 persons, a level also below metro, state and national measures. Caldwell County does have a slightly lower rate than the City of Lockhart for property crime.

For a unilateral view of crime rates, research is based on crimes reported via the FBI’s National Incident-Based Reporting System (NIBRS) which has participation from Texas law enforcement agencies and data is comparable to reports from the Texas Department of Public Safety.

Sources: FBI National Incident-Based Reporting System, Texas Department of Public Safety; Garner Economics

↑ Cost-of-Living

Figure 4.17 Cost-of-Living-Index, 2019

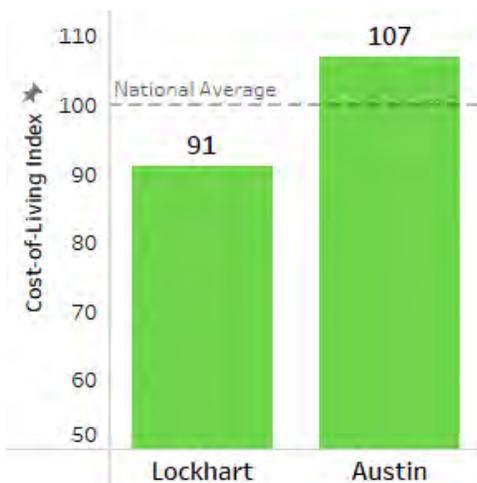


Table 4.4 Cost-of-Living-Index Categories, 2019

Index	Lockhart	Austin
Cost-of-Living Index	91	107
Goods & Services Index	101	101
Groceries Index	90	92
Health Care Index	101	105
Housing Index	72	133
Transportation Index	105	86
Utilities Index	98	95

The cost of living in Lockhart is relatively low with an index rate of 91 compared to Austin at 107 and the national base of 100. Goods & Services, Health Care, and Transportation are slightly above the national average.

Source: AreaVibes.com derived from C2ER Index for 2022, National Average=100, Garner Economics

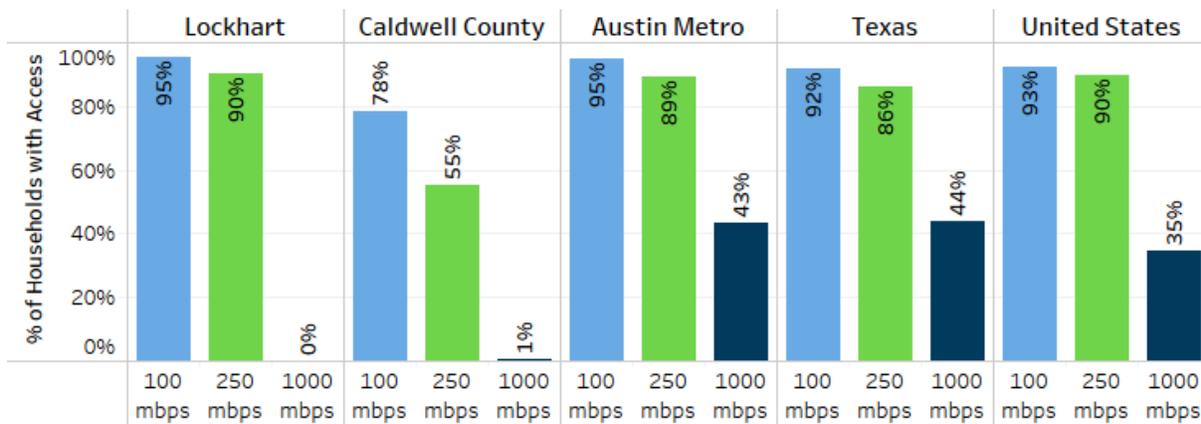
➔ Broadband Access & Speed

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

Access is the first internet indicator presented in this study and is measured by the percent of an area’s households that have access to broadband internet service via several technologies such as cable, fiber, DSL, or fixed wireless. The City of Lockhart has ample access to internet service with speeds of 250 megabits per second (Mbps) at 90% to 95% of households able to get service. Most of the city is covered by at least 4 internet service providers according to the [Texas Broadband Map](#), however, past city limits, there are areas without service.

At higher speeds of 1000 mbps or 1 gig, Lockhart does not have service as of June 2022. Advertised speeds for the area include one provider stating 1000 mbps service currently, so there may be a lag in data as broadband is being improved. One gig service is not as common across the United States, only 35% of households have access, however, this level will be expected by many operations in the future.

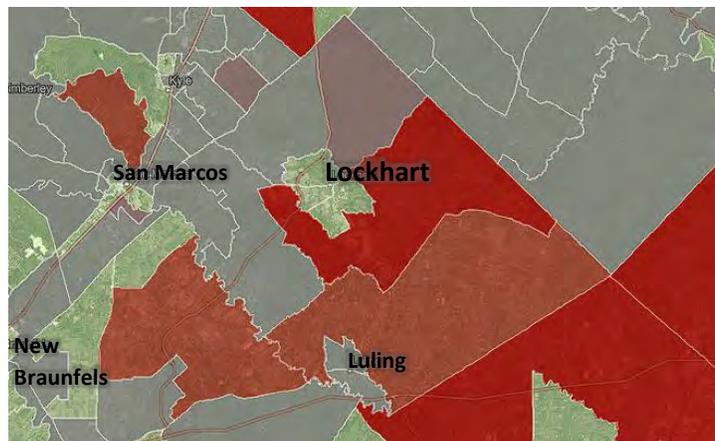
Figure 4.18 Access to Broadband Internet by Speed level, 2022



Source: FCC Broadband Map as of June 2022, Garner Economics (includes ADSL, Cable, Fiber, Fixed Wireless, Satellite, Other)

While broadband access is important, speed is also a vital measure to show the connectivity performance of an area. The FCC considers 25 mbps “broadband” however most households today need at least 100-200 mbps for common activities such as streaming and video chatting and higher speeds for 4K content, gaming and downloading large files. The use of internet-based tools has grown immensely since the COVID-19 pandemic with many people relying on reliable, fast internet to run their businesses, conference with clients, participate in webinars, and a variety of other essential tasks. Figure 4.19 shows the need for broadband in Caldwell County outside Lockhart.

Figure 4.19 Indicators of Broadband Need, 2022



Source: BroadbandUSA, National Telecommunications and Information Administration, accessed March 2023, Garner Economics

Speed tests performed in Lockhart registered speeds up to 347 Mbps however, these tests were concentrated in small areas likely performed by the same address. Data from 2021 show the median download speed was 24 Mbps for Lockhart, 141 Mbps for Austin and 105 Mbps for the state of Texas. With the rapid building out of internet service, these speed levels seem outdated compared to the current speed tests that are showing up, but not with enough consistency to apply to this measure.

➔ Walk & Bike Score

Cost of living, crime, and other measures figure into the evaluation of a community in addition to economic and demographic data. Another way to look at the vibe and attractiveness of an area includes some nontraditional data to measure the livability of the community.

Walk Score is a branded measure of the walkability to nearby amenities by analyzing walking routes. Amenities within a 5-minute walk (.25 miles) are given maximum points, with no points given after a 30-minute walk. Walk Score also measures pedestrian friendliness by analyzing population density and road metrics.

Downtown Lockhart has a Walk Score of 74, which is below the score of Austin’s downtown (92), but still declared “Very Walkable” by the Walk Score publisher. An average score for Lockhart overall was not available. For reference, San Francisco—the top-ranked city in this measure—has a Walk Score of 100 in the Chinatown neighborhood. Scoring is on 100 point scale with the higher numbers reflecting a more walkable area.

The **Bike Score**, another Walk Score ranking, conveys whether a location is good for biking. For a given location, a Bike Score is calculated by measuring bike infrastructure (lanes, trails, etc.), hills, destinations, and road connectivity as well as the number of bike commuters. Component scores are based on data from the United States Geological Survey, Open Street Map, and the U.S. Census.

Lockhart has a Bike Score of 48 for its downtown, lower than Austin’s overall score of 54. The nation’s top score is in Minneapolis at 83. Scoring is on 100 point scale with the higher numbers reflecting a more bike-friendly area.

Figure 4.20 Walk and Bike Scores, 2023

	Lockhart	Austin
 Walk Score (Downtown)		
 Bike Score (Downtown)		

Source: Walk Score, www.walkscore.com accessed March 2023

Chapter 5: Labor Force & Employment

This chapter focuses on the labor market of Lockhart, Texas, beginning with the residents within the City and Caldwell County, 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, and wage comparisons, 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.

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

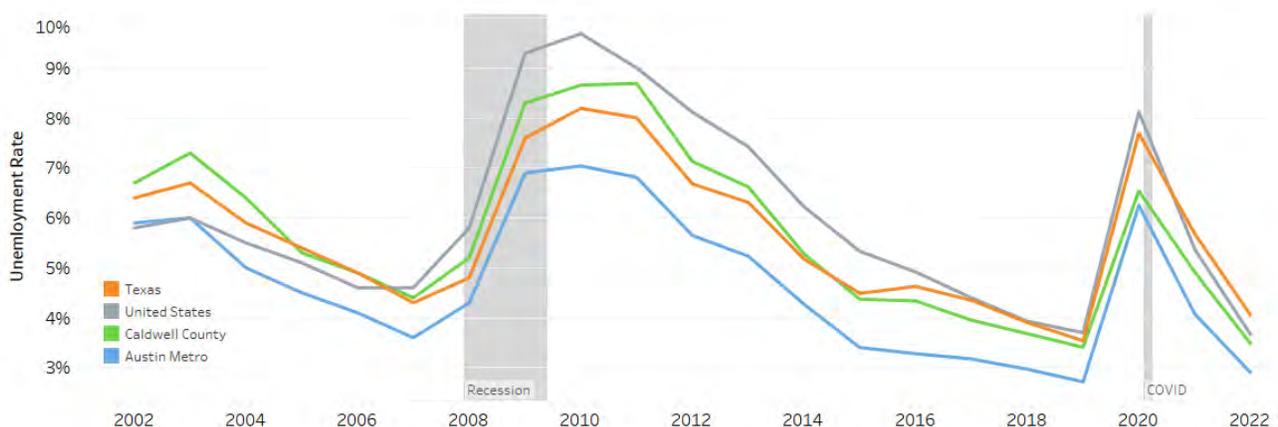
↑ Labor Force & Unemployment

Caldwell County has an average labor force of approximately 18,371 residents with 17,645 employed in 2022. This has increased by 12.5% and 13.1% respectively over the past five years, a rate higher than the state and the nation. Unemployment rates have returned to low levels after a brief recession brought on by the COVID-19 pandemic.

Table 5.1 Labor Force & Employment Status, 2022

	Caldwell County	Austin Metro	Texas	United States
Civilian Labor Force	18,371	1,150,181	13,473,991	161,841,128
Employed	17,645	1,113,688	12,888,025	154,721,775
Unemployment Rate	4.0%	3.2%	4.4%	4.4%
5-Year Change (2017-2022 Annual Average)				
Civilian Labor Force	12.6%	17.8%	8.1%	2.2%
Employed	13.1%	18.2%	8.4%	3.0%
Unemployment Rate	-0.5%	-0.3%	-0.3%	-0.7%

Figure 5.1 Unemployment Rate Trends, 2002–2022

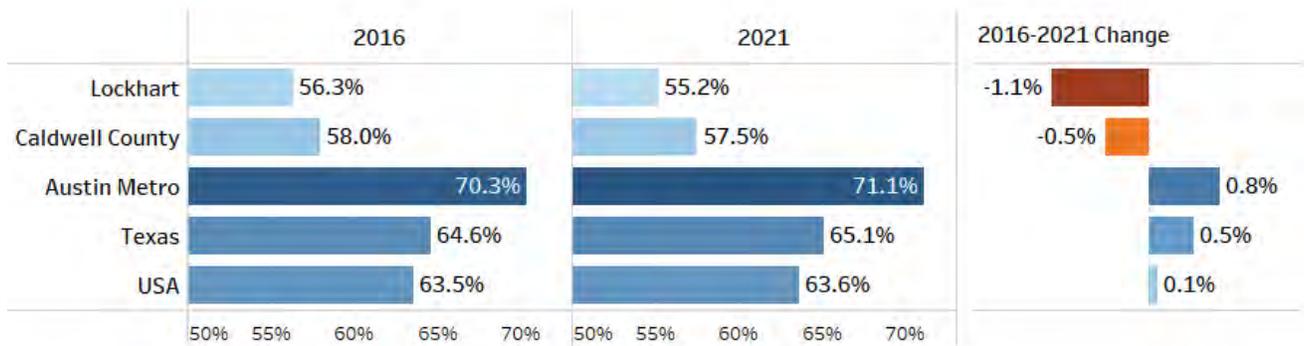


Source: Bureau of Labor Statistics, Garner Economics. Lockhart data is not available.

↓ Labor Force Participation

Labor Force Participation rates have been dropping across the country due to an aging population and other employment factors. Lockhart’s participation rate was 55.2% in 2021, below all benchmarks. This is particularly a sharp contrast to the participation rate of 71.1% for the Austin Metro region overall. Both Lockhart and Caldwell County showed a decline in their rates since 2016 while the metro, state, and nation increased.

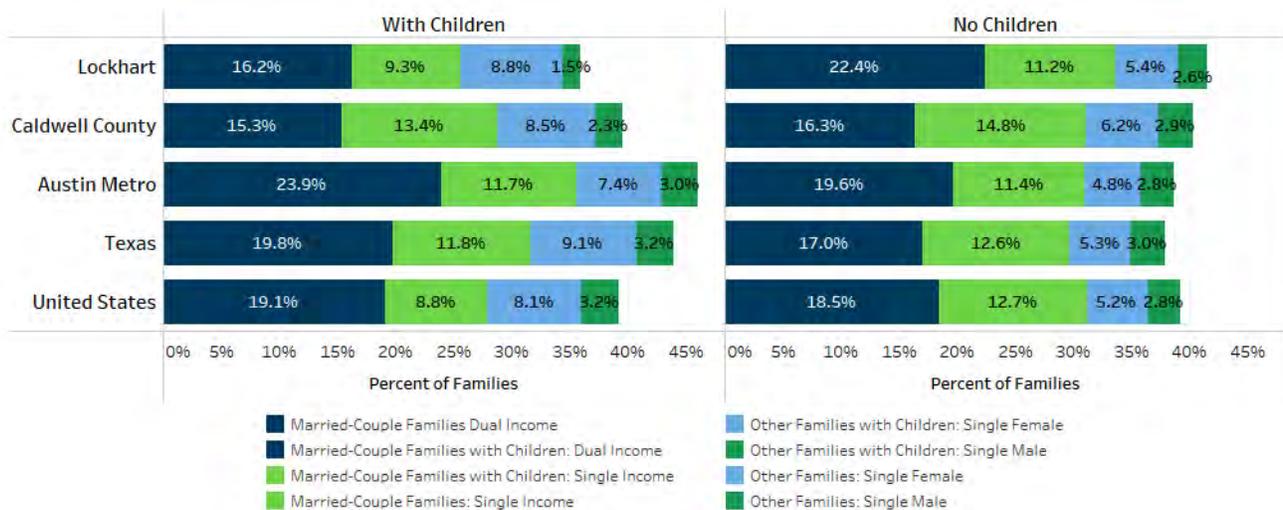
Figure 5.2 Labor Force Participation, 2016–2021



Source: US Census Bureau, Garner Economics

↓ Labor Force Participation – Families

Figure 5.3 Labor Force Participation of Families, 2021



Source: US Census Bureau, Garner Economics

The overall low labor force participation rate is also apparent in the percentage of families in the labor force. Of all families in the City of Lockhart, 77.3% of them participate in the labor force, a rate below all other benchmarks. The largest category of family working is the *Dual Income Families with No Children Under 18 at home* (22.4%). Overall, *Families With Children* in Lockhart (35.8%) participate at a lesser rate than *Families with No Children* (41.6%) in 2021. This is the lowest percentage for *Families With Children* for all benchmarks which may reveal barriers for parents such as childcare or variable school schedules during the pandemic.

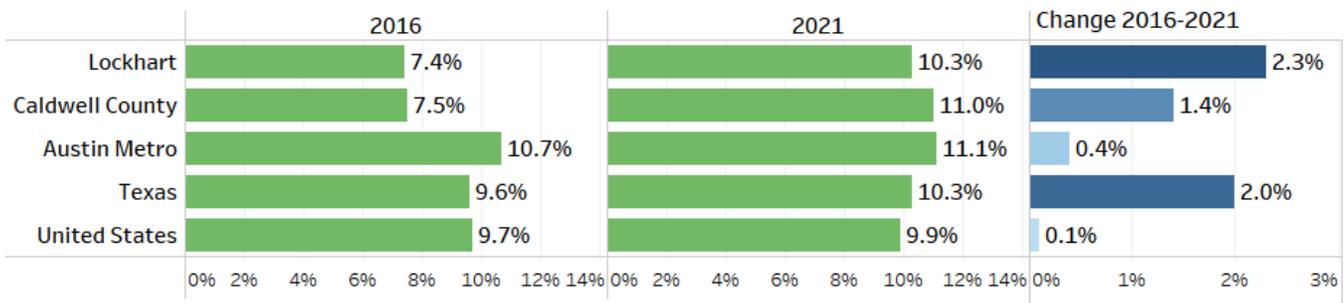
Table 5.2 Labor Force Participation of Families, 2021

	Lockhart	Caldwell County	Austin Metro	Texas	United States
Families With Children	35.8%	39.5%	46.0%	43.9%	39.2%
Married-couple Families with Children: Dual Income	16.2%	15.3%	23.9%	19.8%	19.1%
Married-couple Families with Children: Single Income	9.3%	13.4%	11.7%	11.8%	8.8%
Other Families with Children: Single Female	8.8%	8.5%	7.4%	9.1%	8.1%
Other Families With Children: Single Male	1.5%	2.3%	3.0%	3.2%	3.2%
Families with No Children	41.6%	40.2%	38.6%	37.9%	39.2%
Married-couple Families Dual Income	22.4%	16.3%	19.6%	17.0%	18.5%
Married-couple Families: Single Income	11.2%	14.8%	11.4%	12.6%	12.7%
Other Families: Single Female	5.4%	6.2%	4.8%	5.3%	5.2%
Other Families: Single Male	2.6%	2.9%	2.8%	3.0%	2.8%
Total Families Participating in Labor Force	77.3%	79.7%	84.6%	81.8%	78.4%

Source: US Census Bureau, Garner Economics

 Self-Employment

Figure 5.4 Self Employment

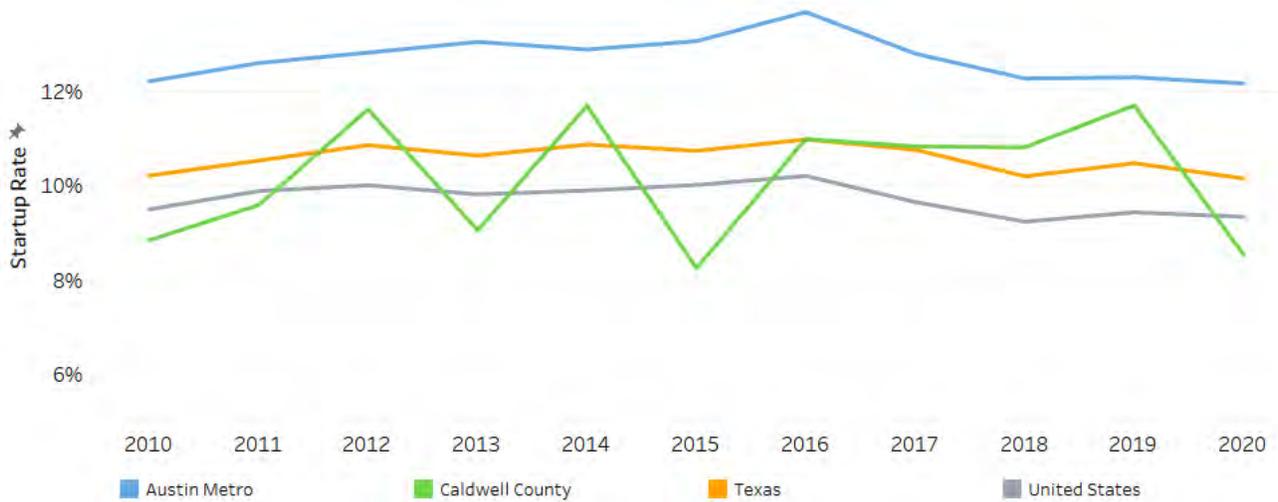


Source: US Census Bureau, Garner Economics

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 10.3% for 2021. This is higher than the nation, equal to Texas but slightly below Caldwell County and the Austin Metro. Given that the Austin Metro is known as an entrepreneurial hub, Lockhart’s self-employment rate along with the highest rate of growth (2.3%) over the past five years, is a positive sign for the city.

➔ Startups

Figure 5.5 Startup Ratio



Source: US Census Bureau, Business Dynamics Statistics, 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. The Austin Metro, known for its entrepreneurial culture, had the highest startup rate well above all other benchmarks.

Caldwell County’s startup rate did increase from 2015 to 2020 by 0.3% when all other geographies – including the Austin Metro, decreased. Additionally, the rate of establishments exiting during the same period decreased by 0.8%, again trending the opposite of other benchmarks.

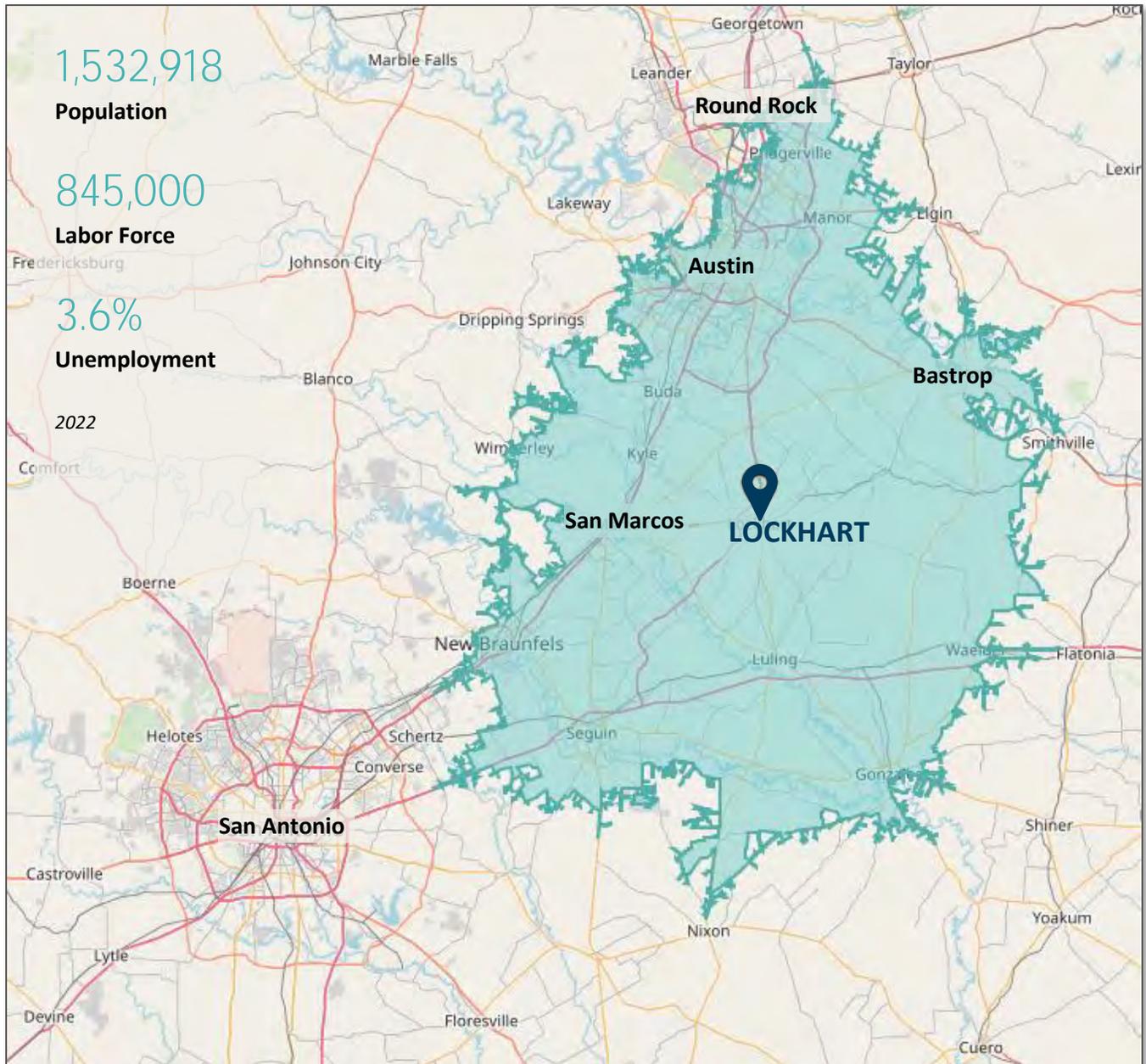
Table 5.3 Startup & Exits

	Caldwell County		Austin Metro		Texas		United States	
	2015	2020	2015	2020	2015	2020	2015	2020
Establishments born during the last 12 months	45	51	5,665	6,172	55,596	56,572	688,532	669,205
Rate of establishments born during the last 12 months	8.2%	8.5%	13.1%	12.2%	10.7%	10.2%	10.0%	9.3%
Establishments exited during the last 12 months	48	48	4,133	4,933	46,398	53,502	608,652	675,145
Rate of establishments exited during the last 12 months	8.8%	8.0%	9.5%	9.7%	9.0%	9.6%	8.9%	9.4%

Source: US Census Bureau, Business Dynamics Statistics, Garner Economics

↑ Labor Force Draw

Figure 5.6 Drive Time Analysis (45-Minute), 2022



Source: ESRI, Garner Economics, 2022

The effective labor draw considers the documented labor pool for a location based on the existing residential workforce and local road network. The analysis considers the pool of active workers residing within representative drive time from a site. Using a 45-minute drive time analysis from the center of Lockhart, the estimated 2022 population is 1,532,918.

This drive time reaches into densely populated areas and exponentially increases Caldwell County and Lockhart’s potential labor force. Within a 45-minute drive, there is a labor force of 845,000 people as of 2022.

➔ **Commuting Patterns**

Figure 5.7 Commuting Patterns City of Lockhart & Caldwell County, 2019

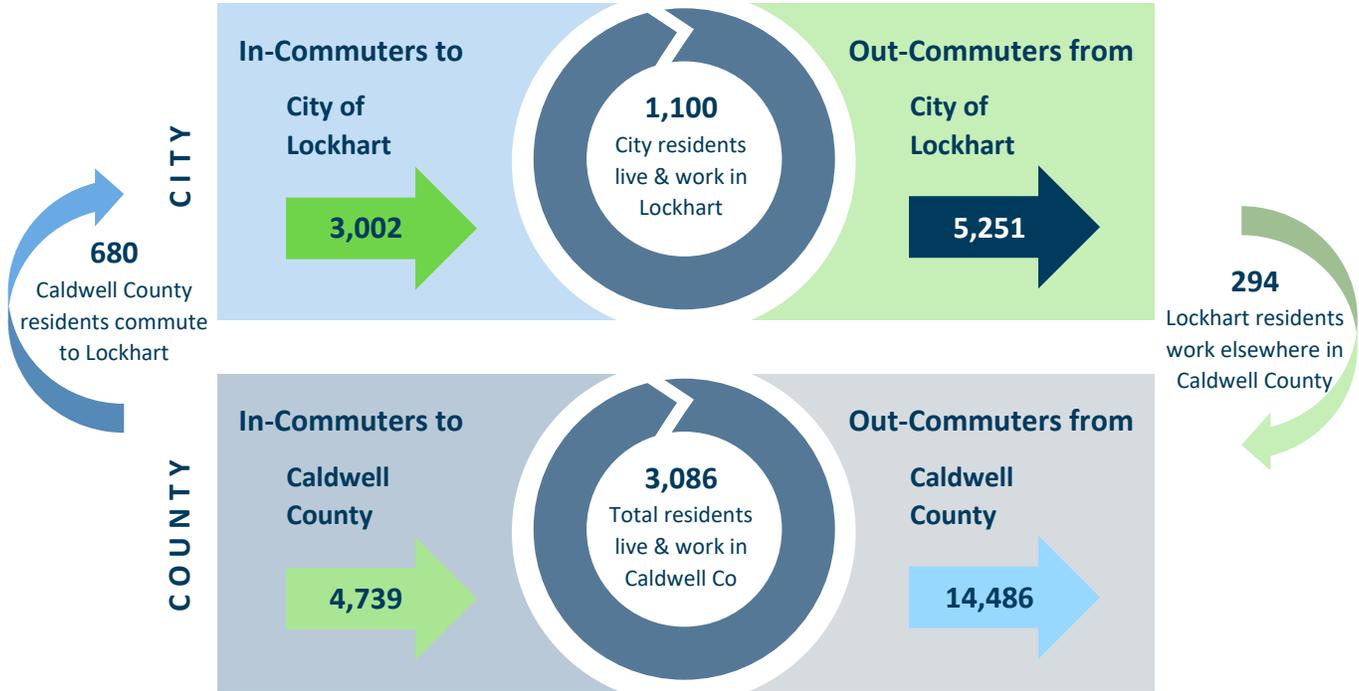


Figure 5.8 In-Commuting Home County
Where People Live Who Work in Lockhart, 2019

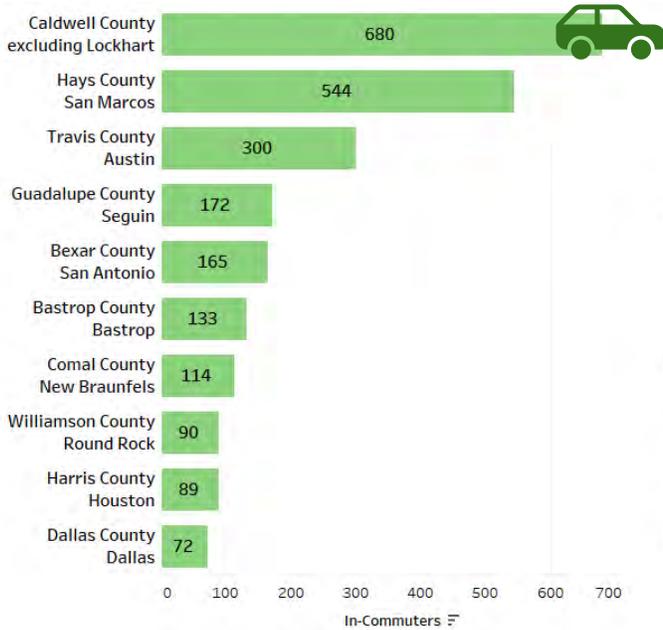
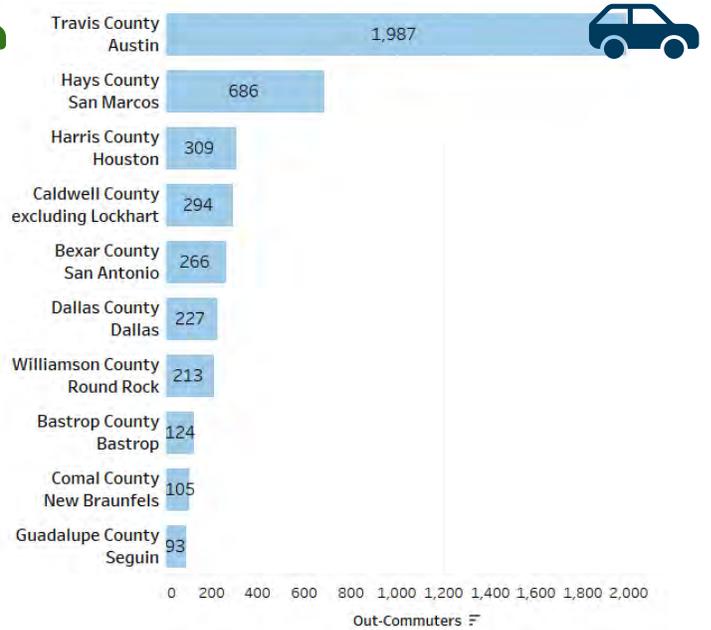


Figure 5.9 Out-Commuting Employer County
Where People Are Employed Who Live in Lockhart, 2019



Source: 2019 U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics

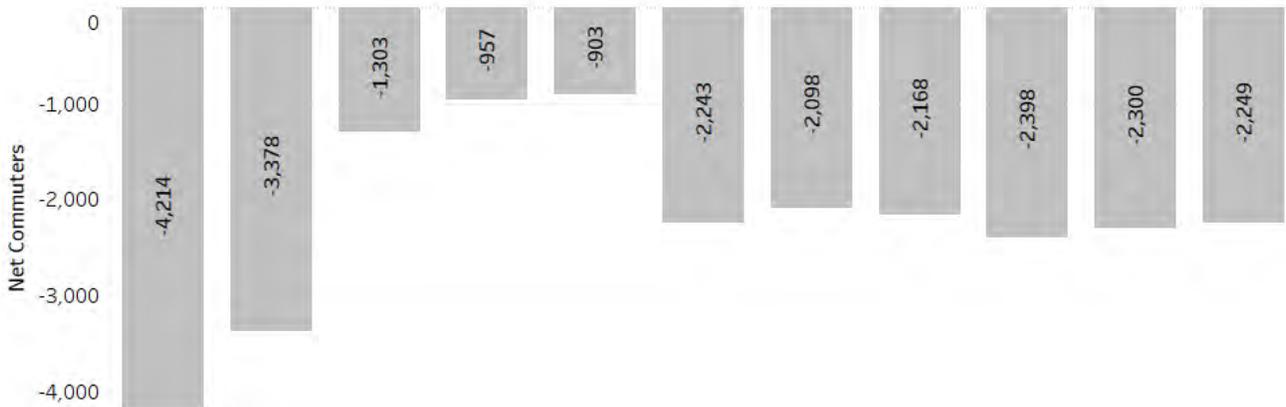
Worker flows help define the size of a local economy’s labor draw, and trends help describe attraction and regional competition. Worker flows represent both daily commuters and short-term, away-from-home assignments. Lockhart residents that remain in the city limits for work are about 27% of the employee base in the City. It is estimated that the 5-year average (2016-2021) for Lockhart residents who work from home is 6.5%. This is below the national rate of 9.7% for the same period. More than 3,000 workers commute into Lockhart for work (Figure 5.9) including nearly 700 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.

The City of Lockhart exports more workers than it retains and imports leaving a net outflow of -2,249 in 2019. The number of Out-Commuters leaving Lockhart for employment elsewhere has risen since 2015 along with in-commuters. Lockhart serves as an employment center drawing commuters in, however, the balance of net commuters have stayed relatively steady since 2014.

Figure 5.10 City of Lockhart Commuting Trends, 2009-2019



Figure 5.11 City of Lockhart Net Commuter Outflow Trend, 2009-2019



Source: 2017 U.S. Census Bureau, Longitudinal Employer-Household Dynamics (LEHD), Garner Economics

Job Growth

A key indicator of economic success is the growth of jobs in an area. Lockhart has shown steady and impressive job growth over the past decade growth of 28%. This growth rate is above all benchmarks except the Austin Metro which experienced a 44.7% increase in employment. The City’s growth has been stronger in the last five years, adding approximately 700 jobs, an increase of 16% since 2017. Once again, this rate is second only to the Austin Metro and four times that of the United States as a whole.

Figure 5.12 Job Growth, 2012–2022

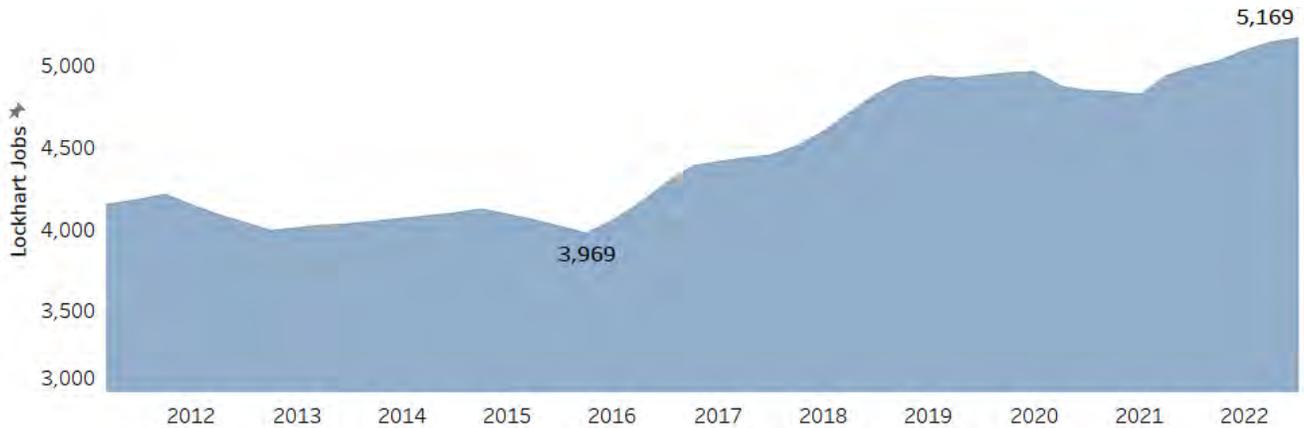


Table 5.4 Job Growth

	2022	5-Year Change (2017-2022)		10-Year Change (2012-2022)	
		#	%	#	%
Lockhart	5,169	722	16.2%	1,132	28.0%
Caldwell County	11,440	1,100	10.6%	1,977	20.9%
Austin Metro	1,263,559	205,645	19.4%	390,361	44.7%
Texas	14,259,655	1,193,274	9.1%	2,567,018	22.0%
United States	160,228,873	5,702,579	3.7%	17,981,035	12.6%

Source: JobsEQ, Garner Economics

Estimated Annual Wages

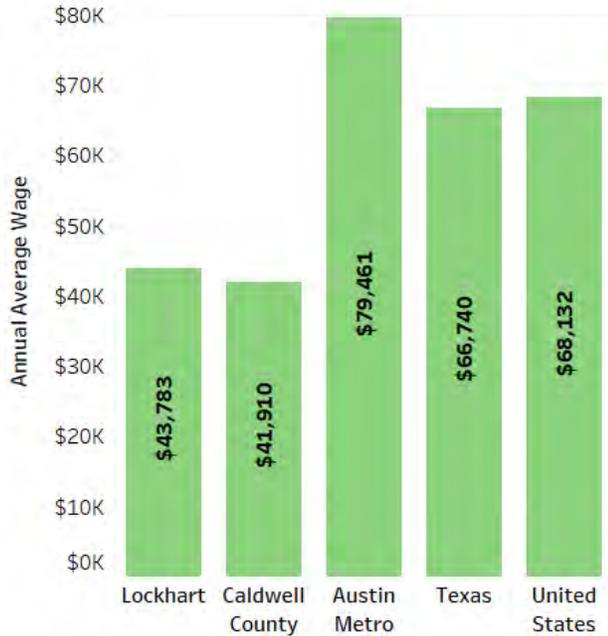
Table 5.5 Wage Growth

	2022	5-Year Change (2017-2022)		10-Year Change (2012-2022)	
		#	%	#	%
Lockhart	\$43,783	\$579	1.3%	\$2,137	5.1%
Caldwell County	\$41,910	\$697	1.7%	\$1,792	4.5%
Austin Metro	\$79,461	\$10,466	15.2%	\$15,198	23.6%
Texas	\$66,740	\$2,729	4.3%	\$4,976	8.1%
United States	\$68,132	\$4,186	6.5%	\$7,442	12.3%

Source: JobsEQ, Garner Economics Figures adjusted for inflation.

Estimated Annual Wages (continued)

Figure 5.13 Average Annual Wage, 2022



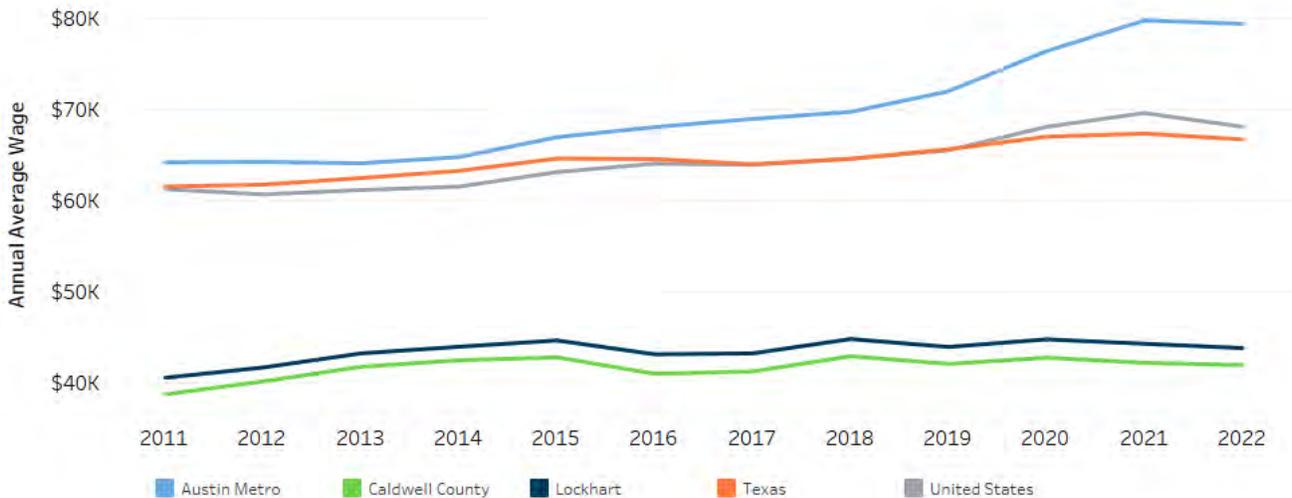
Source: JobsEQ, Garner Economics

The average annual wage per worker for all industries in 2022 is \$43,783 for workers in Lockhart. This wage is the second lowest wage among benchmarks. The wage for Caldwell County is lower at \$41,910 for the same year. The overall average wage for the Austin Metro of \$79,461, significantly higher than any other geography. It should be noted that wage applies only to employment in each geography and does not measure wages for those residents who live in the area but commute outside for employment.

Lockhart has seen modest wage growth over the past five years growing only 1.3% after adjusting for inflation. Lockhart and Caldwell County trail wage growth for 5- and 10-year growth compared to all other benchmarks.

The wage trend in Figure 5.14 illustrates that Lockhart and Caldwell County wage growth has been flat after adjusting for inflation. Texas and the national average have also been relatively modest in growth but Austin continues to outpace growth in recent years.

Figure 5.14 Average Wage Growth (Adjusted for Inflation), 20012-2022



Source: JobsEQ, Garner Economics Figures adjusted for inflation.

Industry Sector Composition

A comparison of major industry employment composition provides a broad relative assessment of differences among economies and may help indicate areas of uniqueness.

The top three industries in the City of Lockhart are *Retail Trade, Accommodation & Food Services*, and *Educational Services*. Caldwell County also has *Retail Trade* as the highest proportion of total employment, however, *Health Care & Social Assistance*, and *Construction* are the other top employers. At the regional level, *Professional, Scientific & Technical Services* is the largest percentage of employment for the entire Austin Metro.

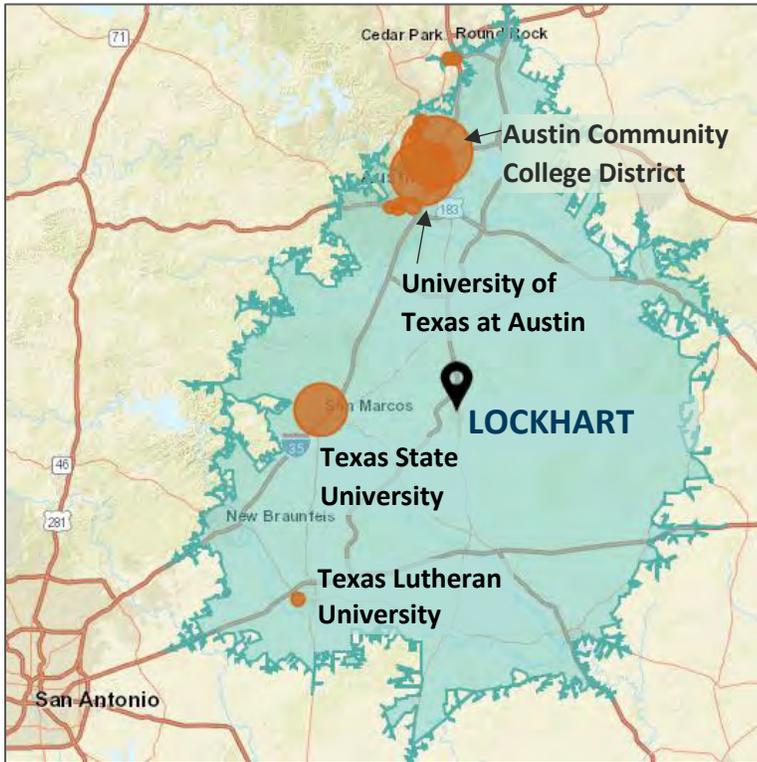
Table 5.6 Industry Sector Composition, Average Annual Employment 2022
Highest Industry Group for Each Geography in Gray

Industry Title	Lockhart	Caldwell County	Austin Metro	Texas	United States
Retail Trade	18.3%	15.0%	9.4%	10.1%	10.1%
Accommodation & Food Services	15.4%	10.3%	9.5%	8.9%	8.5%
Educational Services	13.4%	9.8%	8.4%	8.9%	8.0%
Health Care & Social Assistance	7.2%	14.6%	10.1%	12.7%	14.4%
Public Administration	7.2%	4.5%	4.8%	3.3%	4.6%
Manufacturing	7.1%	5.0%	5.5%	6.6%	8.1%
Construction	6.3%	11.4%	7.1%	7.1%	6.0%
Administrative, Support, Waste Management & Remediation Services	5.7%	3.9%	6.8%	7.1%	6.5%
Finance & Insurance	4.0%	2.2%	4.0%	4.4%	4.0%
Transportation & Warehousing	3.9%	3.7%	3.0%	5.2%	5.0%
Other Services	3.2%	3.8%	4.3%	4.3%	4.3%
Professional, Scientific & Technical Services	2.5%	2.1%	12.6%	7.5%	7.3%
Agriculture, Forestry, Fishing & Hunting	1.6%	7.1%	0.4%	1.2%	1.3%
Wholesale Trade	1.1%	1.4%	3.8%	4.4%	3.8%
Real Estate, Rental & Leasing	1.1%	0.9%	2.3%	2.0%	1.8%
Information	0.7%	0.5%	3.7%	1.7%	2.0%
Utilities	0.6%	0.6%	0.7%	0.6%	0.5%
Arts, Entertainment & Recreation	0.4%	0.9%	1.9%	1.4%	1.9%
Mining, Quarrying, Oil & Gas Extraction	0.2%	2.1%	0.3%	1.4%	0.3%
Management of Companies & Enterprises	0.1%	0.0%	1.4%	1.1%	1.5%

Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economics

→ Colleges & Universities

Figure 5.15 Colleges & Universities (45-Minute Drive Time of Lockhart)
Size of marker relative to 2021 enrollment



Neither Lockhart or Caldwell County have a college or university campus within their boundaries. Colleges and universities within a 45-minute drive offer potential talent for Lockhart businesses. Fourteen schools in the drive-time have an enrollment of nearly 170,000 students. The closest campus to Lockhart is Texas State University located in San Marcos with 42,000 students enrolled. Austin Community College District’s more than 61,000 students are distributed throughout the 11-campus system in the greater Austin area.

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, 2021 (45-Minute Drive Time of Lockhart)

Institution Name	Location	Highest Level Offered	2021 Enrollment
Austin Community College District	Austin	Bachelor's degree	61,370
The University of Texas at Austin	Austin	Doctor's degree	53,502
Texas State University	San Marcos	Doctor's degree	42,111
Saint Edward's University	Austin	Doctor's degree	4,006
Southern Careers Institute-Austin	Austin	Associate degree	2,113
Texas Lutheran University	Seguin	Master's degree	1,580
Huston-Tillotson University	Austin	Master's degree	1,269
The College of Health Care Professions-Austin	Austin	Associate degree	957
Auguste Escoffier School of Culinary Arts-Austin	Austin	Associate degree	912
CyberTex Institute of Technology	Austin	Certificate	733
South University-Austin	Round Rock	Master's degree	697
The Art Institute of Austin	Bastrop	Bachelor's degree	330
AOMA Graduate School of Integrative Medicine	Austin	Doctor's degree	180
Texas Health and Science University	Austin	Master's degree	146
Total 2021 Unduplicated Headcount			169,906

Source: National Center for Education Statistics, Garner Economics

Colleges & Universities: Degrees & Certifications

Figure 5.16 Credentials Granted by Type, 2021

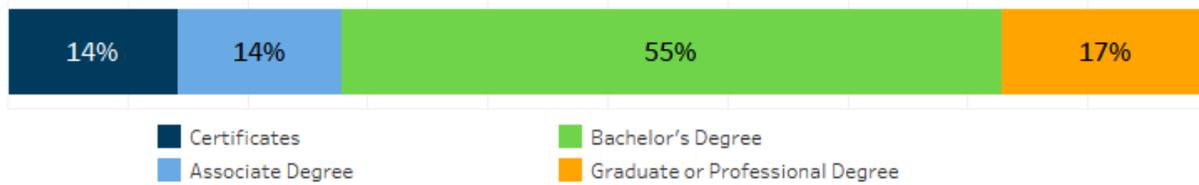


Table 5.8 Credentials Granted by Area of Study, 2021

Area of Study	Credentials Awarded
Business, Management, Marketing, and Related Support Services	5,388
Health Professions and Related Programs	3,503
Communication, Journalism, and Related Programs	2,381
Liberal Arts and Sciences, General Studies and Humanities	2,272
Engineering	2,245
Computer and Information Sciences and Support Services	2,203
Multi/Interdisciplinary Studies	2,174
Biological and Biomedical Sciences	1,854
Social Sciences	1,847
Visual and Performing Arts	1,504
Psychology	1,396
Parks, Recreation, Leisure, Fitness, and Kinesiology	1,083
Education	871
Homeland Security, Law Enforcement, Firefighting and Related	815
Public Administration and Social Service Professions	693
Family and Consumer Sciences/Human Sciences	672
Foreign Languages, Literature, and Linguistics	644
English Language and Literature/Letters	636
Mathematics and Statistics	633
Engineering/Engineering-related Technologies/Technicians	508
Legal Professions and Studies	474
Physical Sciences	469
History	307
Culinary, Entertainment, and Personal Services	272
Precision Production	187
Architecture and Related Services	174
Area, Ethnic, Cultural, Gender, and Group Studies	167
Philosophy and Religious Studies	147
Agricultural/Animal/Plant/Veterinary Science and Related Fields	142
Natural Resources and Conservation	137
Mechanic and Repair Technologies/Technicians	103
Total Degrees/Certificates Granted in 2021	36,006

Source: National Center for Education Statistics, Garner Economics

Chapter 6: Local Specialization & Growth

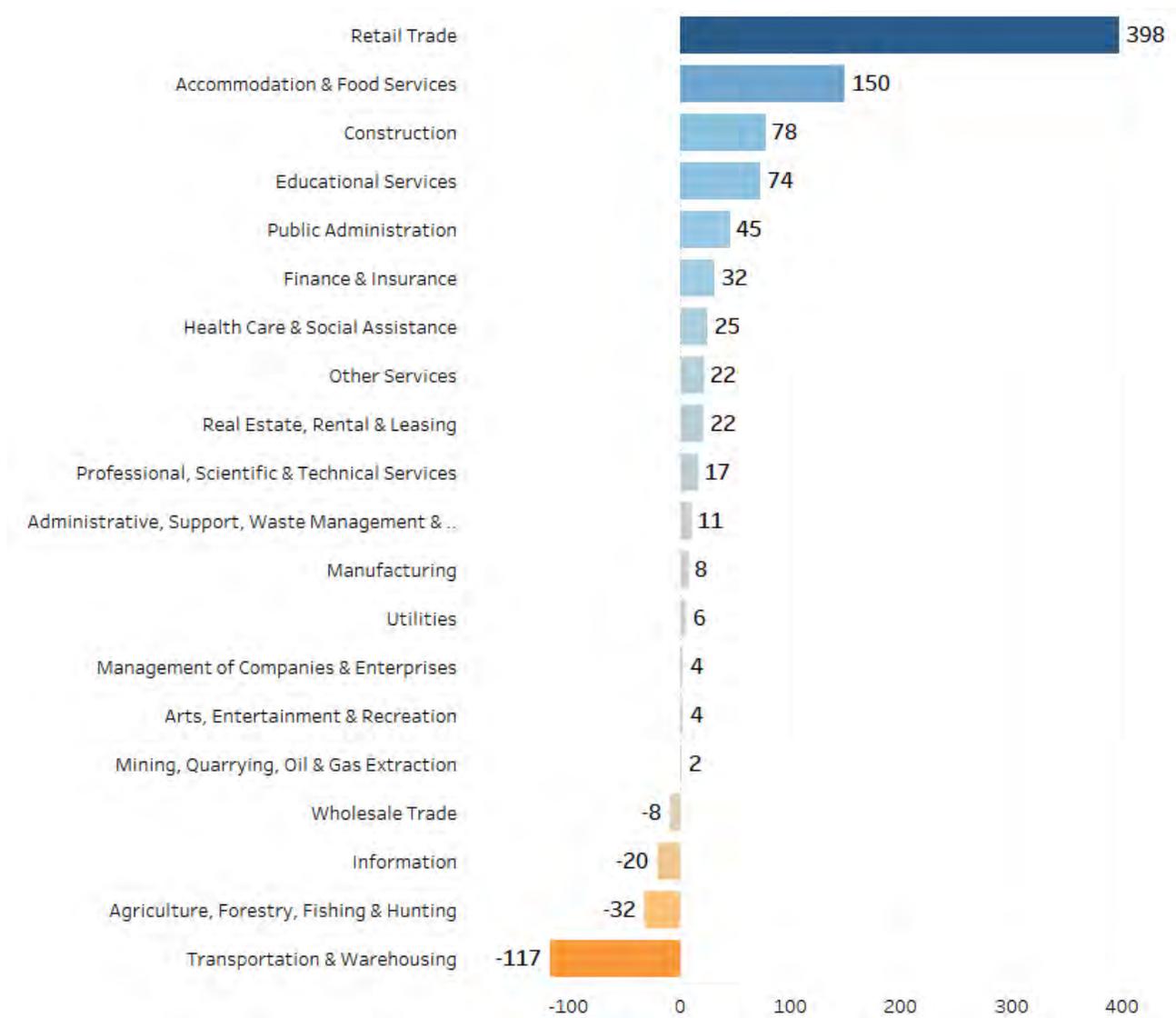
The following section provides a more detailed and in-depth assessment of Lockhart and Caldwell County. The analysis examines the local economy from several different perspectives, each adding a supporting layer of information. The main goals are to provide historical context, reveal areas of unique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

Measurements included

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

Major Industry Sector Change

Figure 6.1 Employment Change by Major Industry, 2017–2022
Ranked by Absolute Change



Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economics

A majority of industry sectors in Lockhart experienced some job growth between 2017 and 2022 with the largest absolute industry increase occurring within *Retail* operations, gaining nearly 400 jobs. Other sectors with large employment gains include *Accommodation & Food Services* (+150 jobs) and *Construction* (+78 jobs). Overall, Lockhart had employment of 5,169 in 2022 as of the third quarter and added 722 jobs between 2017 and 2022. Caldwell County has 11,440 employees for the same time frame and added 1,100 jobs in the past five years.

Manufacturing jobs stayed steady for both Lockhart and Caldwell County adding under ten jobs for the five years studied. The *Transportation and Warehousing* sector lost 117 jobs in Lockhart and another 158 in the rest of the county (-275 jobs in Caldwell County overall).

As work-from-home trends grew in 2020, it is important to note that data used in this chapter reflect employment reported in the geography of the business establishment. As mentioned in Chapter 5: Commuting, there is an average of 6.5% of Lockhart’s residents reporting that they work from home.

Table 6.1 Employment Change by Major Industry, 2017–2022
Ranked by Absolute Change

Industry Sector	Lockhart			Caldwell County		
	2022 Jobs	5-Year Change	LQ	2022 Jobs	5-Year Change	LQ
Retail Trade	943	398	1.8	1,716	520	1.5
Accommodation & Food Services	794	150	1.8	1,177	238	1.2
Construction	325	78	1.1	1,306	335	1.9
Educational Services	690	74	1.7	1,124	116	1.2
Public Administration	371	45	1.6	510	52	1.0
Finance & Insurance	207	32	1.0	256	36	0.6
Health Care & Social Assistance	371	25	0.5	1,668	22	1.0
Other Services	165	22	0.7	432	24	0.9
Real Estate, Rental & Leasing	57	22	0.6	102	20	0.5
Professional, Scientific & Technical Services	130	17	0.3	238	56	0.3
Administrative, Support, Waste Management & Remediation Services	295	11	0.9	451	-13	0.6
Manufacturing	369	8	0.9	567	9	0.6
Utilities	30	6	1.1	74	1	1.3
Management of Companies & Enterprises	5	4	0.1	5	3	0.0
Arts, Entertainment & Recreation	22	4	0.2	104	9	0.5
Mining, Quarrying, Oil & Gas Extraction	11	2	0.6	242	39	6.1
Wholesale Trade	57	-8	0.3	163	-4	0.4
Information	37	-20	0.3	59	-24	0.3
Agriculture, Forestry, Fishing & Hunting	84	-32	1.2	806	-67	5.3
Transportation & Warehousing	203	-117	0.8	428	-275	0.8
Total - All Industries	5,169	722	1.0	11,440	1,100	1.0

Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economics

Industry Earnings

Lockhart and Caldwell County’s average industry earnings are significantly lower than national averages for the same industry sectors in 2022. Industry average wages (and employment) reflect occupations at all levels working within a business sector in that geography.

All industry sectors have average wages below its counterpart at the national level. The difference between national and local wages offers insight into areas of cost-saving opportunities for Lockhart in recruitment efforts.

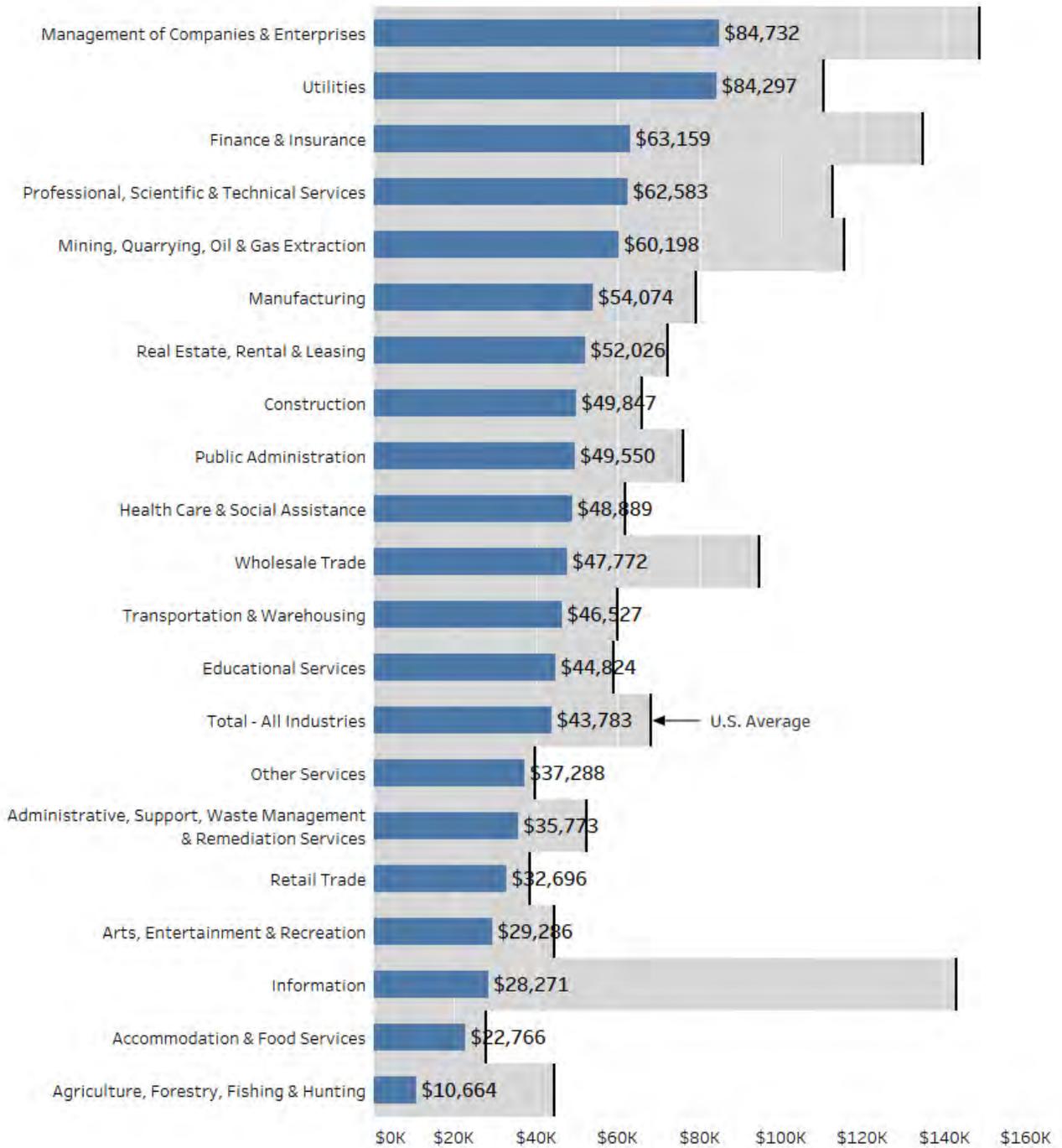
Three industry sector wages reported for the county are 50% or more below national averages. These are *Information* (-80% below), *Agriculture* (-65% below), and *Finance & Insurance* (-53% below). The average annual wage for all private industries in Lockhart is \$43,783 and \$41,910 in Caldwell County. These are 36% and 38% below the national average of \$68,132 respectively.

Table 6.2 Average Annual Industry Salary Comparison, 2022
Ranked by Highest Local Wages
Wages Significantly Lower (-50%) than National are Highlighted in Grey

Industry Sectors	Lockhart Average Wages	Caldwell County Average Wages	Lockhart % Difference	Caldwell County % Difference
Management of Companies & Enterprises	\$84,732	\$84,735	-43%	-43%
Utilities	\$84,297	\$84,026	-24%	-24%
Finance & Insurance	\$63,159	\$63,005	-53%	-53%
Professional, Scientific & Technical Services	\$62,583	\$62,372	-44%	-45%
Mining, Quarrying, Oil & Gas Extraction	\$60,198	\$60,832	-48%	-47%
Manufacturing	\$54,074	\$54,004	-32%	-32%
Real Estate, Rental & Leasing	\$52,026	\$52,061	-28%	-28%
Construction	\$49,847	\$49,925	-24%	-24%
Public Administration	\$49,550	\$49,550	-35%	-35%
Health Care & Social Assistance	\$48,889	\$48,815	-21%	-21%
Wholesale Trade	\$47,772	\$48,134	-49%	-49%
Transportation & Warehousing	\$46,527	\$50,059	-23%	-17%
Educational Services	\$44,824	\$44,620	-24%	-24%
Other Services	\$37,288	\$32,149	-6%	-19%
Administrative, Support, Waste Management & Remediation Services	\$35,773	\$35,689	-32%	-32%
Retail Trade	\$32,696	\$32,363	-15%	-16%
Arts, Entertainment & Recreation	\$29,286	\$29,289	-34%	-34%
Information	\$28,271	\$28,082	-80%	-80%
Accommodation & Food Services	\$22,766	\$22,871	-18%	-18%
Agriculture, Forestry, Fishing & Hunting	\$10,664	\$15,670	-76%	-65%
Total - All Industries	\$43,783	\$41,910	-36%	-38%

Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economics

**Figure 6.2 Average Annual Industry Salary Comparison, 2022
Ranked by Highest Local Wages**

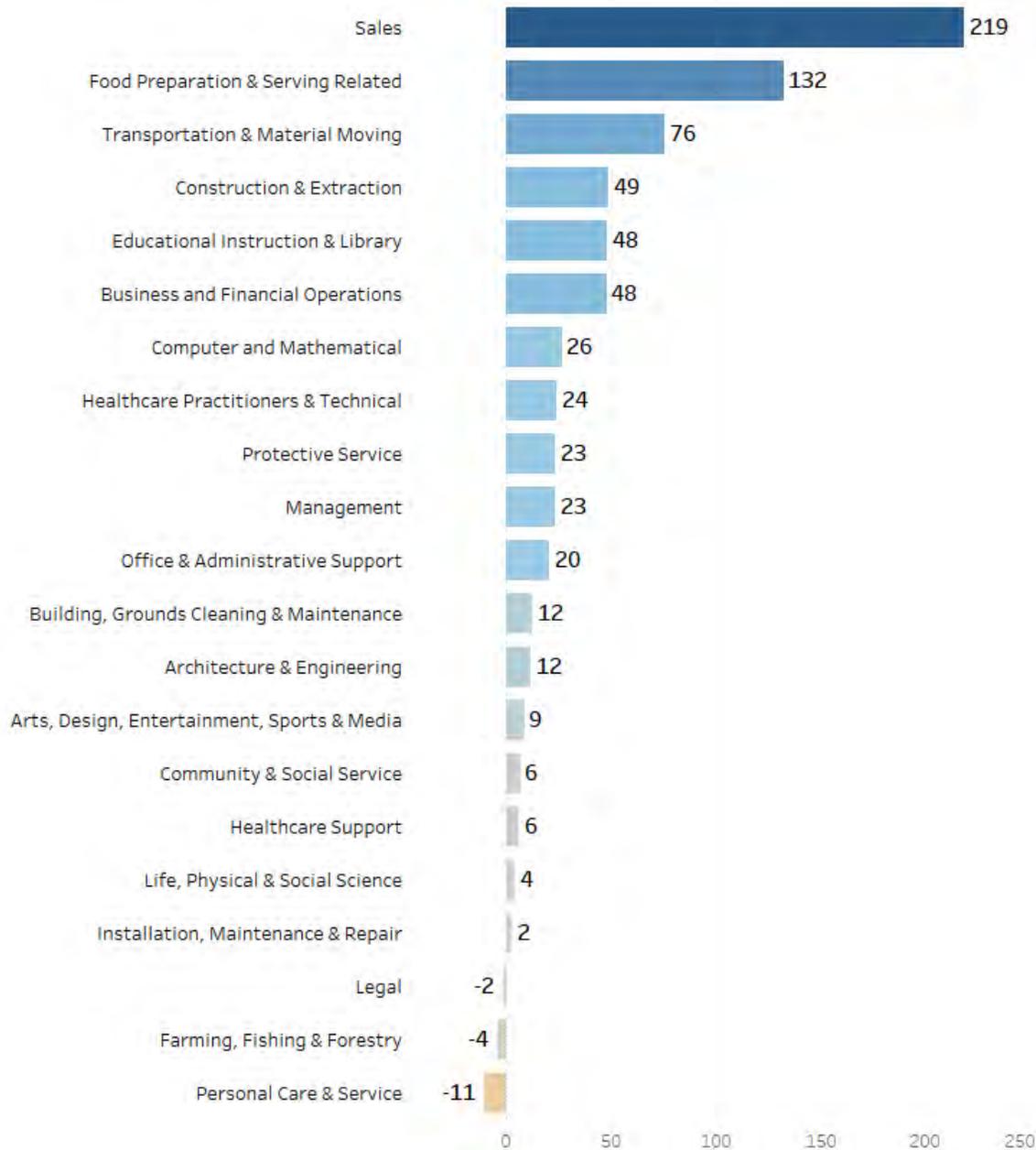


Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economics

Major Occupational Change

Occupational groups work in a variety of industry sectors but have a commonality in the type of work performed. Most occupational categories remained steady or gained jobs during the past five years in both Lockhart and Caldwell County. The largest job increase was in the *Sales* occupational group gaining 219 jobs since 2017 in Lockhart. An additional 61 jobs were added in *Sales* elsewhere in the county for a total of 280 new sales jobs in Caldwell County. With the *Retail* business sector creating the most jobs, it is likely most of that growth is in the form of retail sales or cashier-type workers.

Figure 6.3 Employment Change by Occupational Group, 2017–2022



Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economics

In Lockhart, major growth also occurred in *Food Preparation & Serving Related* (+132 jobs) and *Transportation & Material Moving* (+76 jobs). Interestingly the *Transportation and Warehousing* industry sector lost 117 jobs indicating distribution is still a part of Lockhart’s economy – but it may not be in a company with a singular transportation or warehousing focus.

Caldwell County as a whole also reflected job growth in *Food Preparation & Serving Related* and *Construction & Extraction* positions. *Transportation & Material Moving* job growth occurred in Lockhart with no additional employment reported outside the city.

Table 6.3 Employment Change by Major Occupational Group, 2017–2022
Ranked by Absolute Change in Lockhart

Occupational Group	Lockhart			Caldwell County		
	2022 Employment	5-Year Change	LQ	2022 Employment	5-Year Change	LQ
Sales	666	219	1.4	1,286	280	1.2
Food Preparation & Serving Related	751	132	1.8	1,150	202	1.3
Construction & Extraction	237	49	1.0	964	220	1.9
Transportation & Material Moving	437	76	1.0	810	76	0.8
Business and Financial Operations	191	48	0.6	388	90	0.5
Educational Instruction & Library	462	48	1.7	784	70	1.3
Healthcare Practitioners & Technical	146	24	0.5	580	56	0.9
Computer and Mathematical	75	26	0.4	145	43	0.4
Protective Service	223	23	2.0	310	28	1.3
Management	347	23	1.0	1,229	23	1.6
Community & Social Service	68	6	0.8	232	31	1.2
Office & Administrative Support	475	20	0.7	1,036	16	0.7
Architecture & Engineering	42	12	0.5	94	17	0.5
Arts, Design, Entertainment, Sports & Media	52	9	0.6	124	16	0.6
Life, Physical & Social Science	25	4	0.5	59	10	0.6
Building, Grounds Cleaning & Maintenance	217	12	1.3	412	-0	1.1
Installation, Maintenance & Repair	210	2	1.1	460	-4	1.0
Legal	29	-2	0.7	51	-2	0.5
Personal Care & Service	89	-11	0.7	242	-2	0.9
Production	290	0	1.0	500	-15	0.8
Farming, Fishing & Forestry	9	-4	0.3	115	-14	1.6
Healthcare Support	128	6	0.6	469	-42	0.9
Total - All Occupations	5,169	722	1.0	11,440	1,100	1.0

Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economics

Table 6.3 below reflects data of both residence-based and work-based data. The table shows the number of residents living in Lockhart and Caldwell County that perform the type of work in the occupational category – regardless of where they are employed (2022 Residents column). The table also reflects workplace-based occupations (also in Table 6.3). The comparison of the two shows net commuting and is an indicator of supply and demand at a high level for the occupation. This net commuter figure show how the supply of residents matches – again from a broad perspective – jobs for the occupational group. A positive number of net commuters means it is likely that commuters are entering the city or county for work, while a negative figure indicates commuters leaving the area for employment.

Table 6.4 Occupational Group Employment of Residents and Workers, 2022

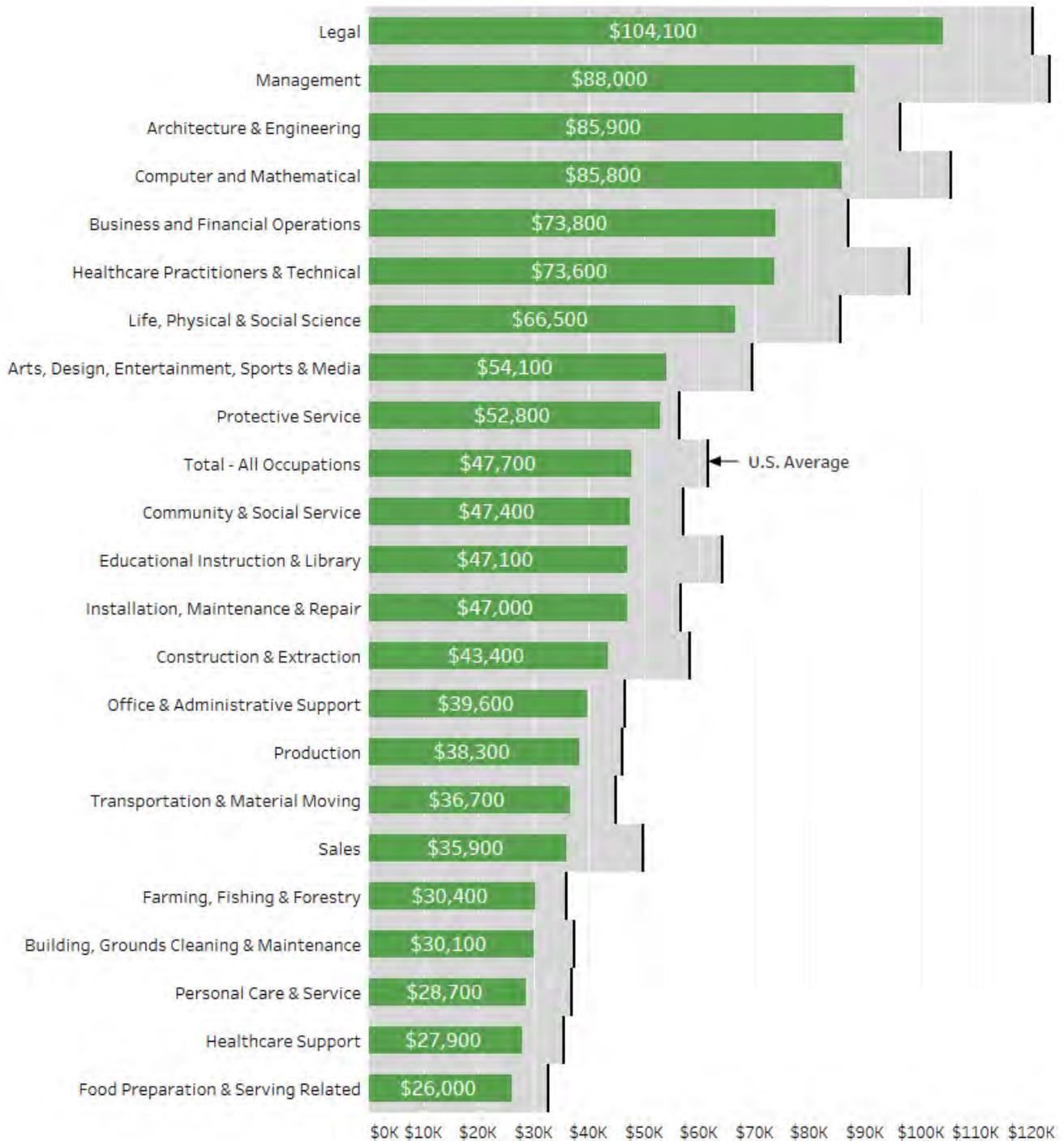
	Lockhart			Caldwell County		
	2022 Residents	2022 Employment	Net Commuters	2022 Residents	2022 Employment	Net Commuter
Sales	602	666	64	1,691	1,286	(405)
Food Preparation & Serving	771	751	(20)	2,477	1,150	(1327)
Construction & Extraction	495	237	(258)	2,021	964	(1057)
Transportation & Material Moving	718	437	(281)	2,064	810	(1254)
Business and Financial Operations	108	191	83	270	388	118
Educational Instruction & Library	279	462	183	671	784	113
Healthcare Practitioners & Technical	106	146	40	564	580	16
Computer and Mathematical	44	75	31	116	145	29
Protective Service	144	223	79	365	310	(55)
Management	358	347	(11)	1,162	1,229	67
Community & Social Service	33	68	35	137	232	95
Office & Administrative Support	523	475	(48)	1,674	1,036	(638)
Architecture & Engineering	7	42	35	67	94	27
Arts, Design, Entertainment, Sports & Media	13	52	39	56	124	68
Life, Physical & Social Science	5	25	20	33	59	26
Building, Grounds Cleaning & Maintenance	294	217	(77)	1,016	412	(604)
Installation, Maintenance & Repair	398	210	(188)	1,193	460	(733)
Legal	17	29	12	50	51	1
Personal Care & Service	103	89	(14)	343	242	(101)
Production	467	290	(177)	1,459	500	(959)
Farming, Fishing & Forestry	26	9	(17)	192	115	(77)
Healthcare Support	178	128	(50)	842	469	(373)
Total - All Occupations	5,689	5,169	(520)	18,462	11,440	(7022)

Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economics

Net Commuters – The minimum number of workers who commute in or out of the region to satisfy the regional numbers of jobs held. A positive number describes commuters entering a region, while a negative number describes commuters leaving a region.

Occupational Earnings

**Figure 6.4 Average Annual Occupational Salary Comparison, 2022
Ranked by Highest Local Wages**



Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economics

Average annual occupational wages for Lockhart and Caldwell County are virtually the same as each other and, on the whole, less than national levels. The average annual wage for all occupations in Lockhart was \$47,700, compared to \$61,600 for the national average, a difference of -23%. Every occupational group has average wages reported for Lockhart that are below national averages. However, unlike industry categories, the differences are not as dramatic between national and local pay scales. None of the wage differentials topped 30% over or under aligning closer to the national level than industry wage comparisons.

Table 6.5 Average Annual Occupational Group Salary Comparison, 2022
Ranked by Highest Local Wages
Wages Significantly Lower (-30%) than National are Highlighted in Grey

Occupational Group	Lockhart Average Wages	Lockhart % Difference
Legal	\$104,100	-14%
Management	\$88,000	-29%
Architecture & Engineering	\$85,900	-11%
Computer and Mathematical	\$85,800	-19%
Business and Financial Operations	\$73,800	-15%
Healthcare Practitioners & Technical	\$73,600	-25%
Life, Physical & Social Science	\$66,500	-22%
Arts, Design, Entertainment, Sports & Media	\$54,100	-22%
Protective Service	\$52,800	-7%
Community & Social Service	\$47,400	-17%
Educational Instruction & Library	\$47,100	-27%
Installation, Maintenance & Repair	\$47,000	-17%
Construction & Extraction	\$43,400	-25%
Office & Administrative Support	\$39,600	-15%
Production	\$38,300	-17%
Transportation & Material Moving	\$36,700	-18%
Sales	\$35,900	-28%
Farming, Fishing & Forestry	\$30,400	-15%
Building, Grounds Cleaning & Maintenance	\$30,100	-20%
Personal Care & Service	\$28,700	-22%
Healthcare Support	\$27,900	-21%
Food Preparation & Serving Related	\$26,000	-20%
Total - All Occupations	\$47,700	-23%

Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economic

Major Industry Sector Specialization & Growth

Major industry sector specialization focuses on the geographic concentrations of similar industries, or location quotient (LQ). This indication of specialization measures the relative concentration of a particular industry to the nation. In simple terms, a high LQ (above 1.2) indicates what a local economy is good at doing and implies there are unique skills, institutions, raw materials, etc., that support this position.

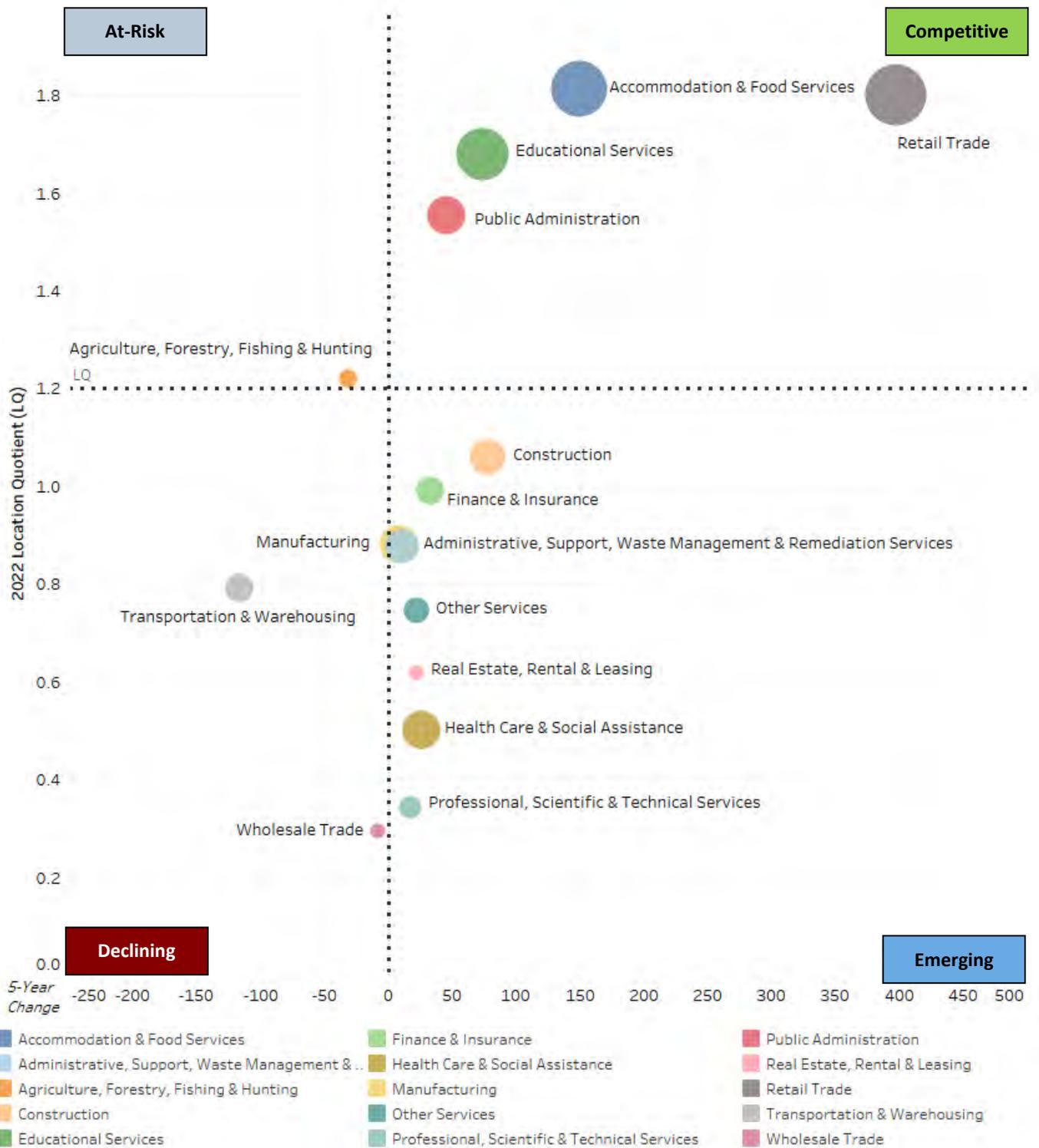
- Seven industry sectors have a local specialization greater than one and experienced job growth in the past five years in Lockhart. These make up the **Competitive** category and can be found below under the green heading. The top growth industry sectors are *Retail* and *Accommodation & Food Services*.
- Nine 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. Most of these sectors had modest job growth.
- Two sectors were classified as **Declining** due to job loss and low local specialization. *Wholesale* and *Transportation & Warehousing* declines are concerning, as these sectors can be key to the supply chain manufacturing operations.
- The *Agriculture, Forestry, Fishing & Hunting* industry is deemed **At-Risk** because of a combination of an LQ of more than one combined with job loss in the last five years.

Table 6.6 Lockhart Industry Specialization and Change

Industry Sector	5-Year Employment Change	2022 Employment	2022 Location Quotient
Competitive			
Retail Trade	398	943	1.8
Accommodation & Food Services	150	794	1.8
Construction	78	325	1.1
Educational Services	74	690	1.7
Public Administration	45	371	1.6
Finance & Insurance	32	207	1.0
Utilities	6	30	1.1
Emerging			
Health Care & Social Assistance	25	371	0.5
Other Services	22	165	0.7
Real Estate, Rental & Leasing	22	57	0.6
Professional, Scientific & Technical Services	17	130	0.3
Administrative, Support, Waste Management & Remediation Services	11	295	0.9
Manufacturing	8	369	0.9
Management of Companies & Enterprises	4	5	0.1
Arts, Entertainment & Recreation	4	22	0.2
Mining, Quarrying, Oil & Gas Extraction	2	11	0.6
Declining			
Wholesale Trade	-8	57	0.3
Information	-20	37	0.3
Transportation & Warehousing	-117	203	0.8
At-Risk			
Agriculture, Forestry, Fishing & Hunting	-32	84	1.2

Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economic

Figure 6.5 Lockhart Industry Specialization & Growth
Industries with Employment of 50 or More



Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economic

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.

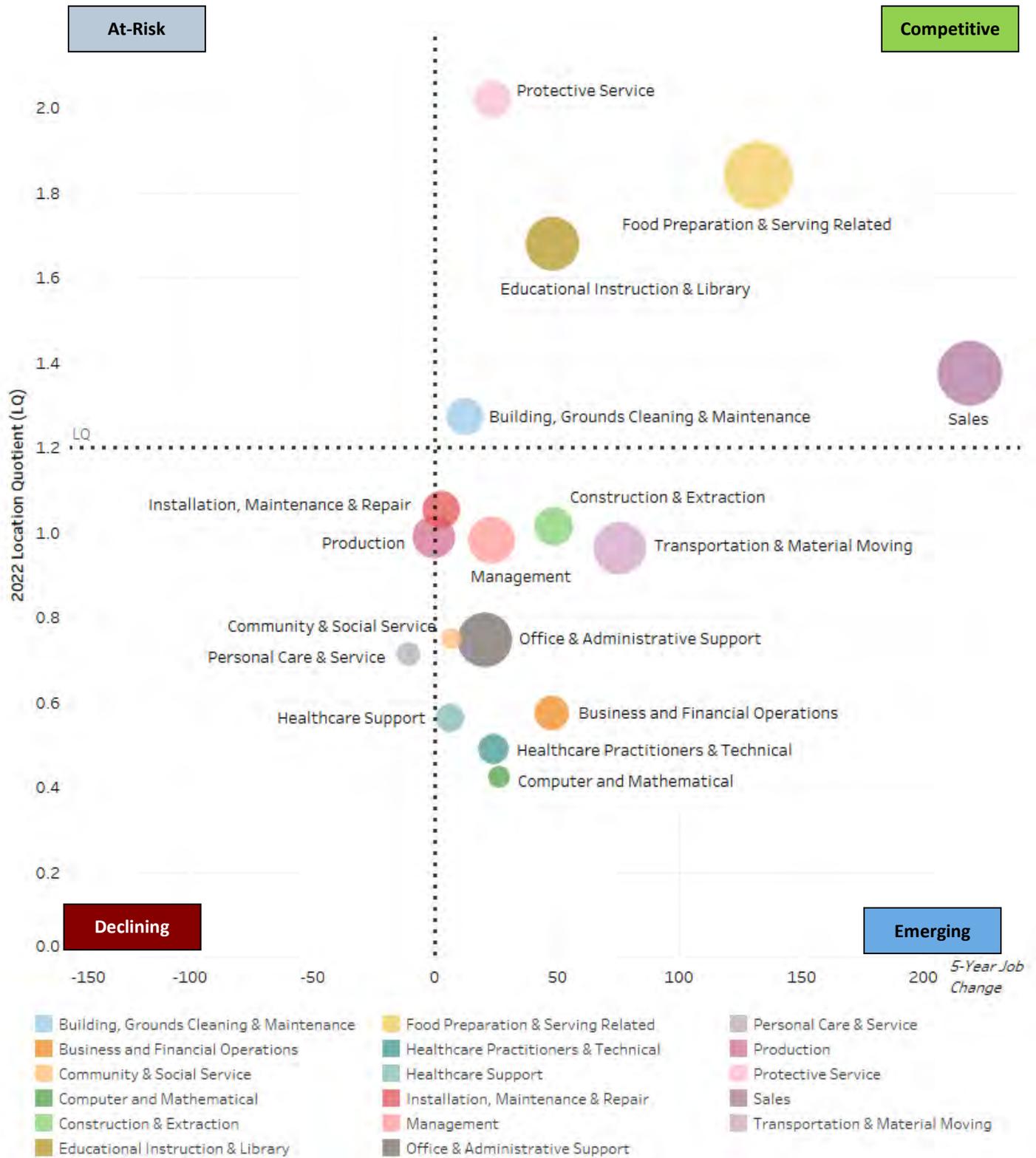
- Nine occupation groups have a local specialization greater than 1 and experienced job growth in the past five years. Classified as **Competitive**, these are listed below under the green heading. The top occupational group by job growth is *Sales* with 219 net job growth and an LQ of 1.4, while the highest LQ is that of *Protective Service* occupations which grew a modest 23 jobs.
- Nine occupation groups had local specialization below 1 but experienced job growth within the past five years and are considered **Emerging**. They are below under the orange heading. *Business & Financial Operations* added the most jobs (+48).
- 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 and a lack of job growth. *Production* jobs have not grown while overall *Manufacturing* industry jobs added 8 jobs. This may be due to the changing nature of manufacturing.

Table 6.7 Lockhart Occupational Specialization and Change

Occupational Group	5-Year Employment Change	2022 Employment	2022 Location Quotient
Competitive			
Sales	219	666	1.4
Food Preparation & Serving Related	132	751	1.8
Transportation & Material Moving	76	437	1.0
Construction & Extraction	49	237	1.0
Educational Instruction & Library	48	462	1.7
Protective Service	23	223	2.0
Management	23	347	1.0
Building, Grounds Cleaning & Maintenance	12	217	1.3
Installation, Maintenance & Repair	2	210	1.1
Emerging			
Business & Financial Operations	48	191	0.6
Computer & Mathematical	26	75	0.4
Healthcare Practitioners & Technical	24	146	0.5
Office & Administrative Support	20	475	0.7
Architecture & Engineering	12	42	0.5
Arts, Design, Entertainment, Sports & Media	9	52	0.6
Community & Social Service	6	68	0.8
Healthcare Support	6	128	0.6
Life, Physical & Social Science	4	25	0.5
Declining			
Legal	-2	29	0.7
Farming, Fishing & Forestry	-4	9	0.3
Personal Care & Service	-11	89	0.7
At-Risk			
Production	0	290	1.0

Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economic

Figure 6.5 Lockhart Occupational Specialization & Growth



Source: JobsEQ, 4 Quarter Average ending Q1 2022, Garner Economics

Chapter 7: Targets

The optimal business sector selection is based on the specific characteristics of the economy and assets of Lockhart, Texas. Garner Economics worked to validate existing targets, look for new opportunities, and group business sectors in target families that are thematically similar or leverage the same assets within the city and surrounding area. These recommended targets are designed to assist the City and its economic development efforts in focusing resources on sectors in which Lockhart holds a competitive advantage, has growth potential, and/or improves the quality of place. This approach will help policymakers prioritize the City’s community and economic development strategy. It is important to note that some activity is occurring organically and is not included or prioritized for marketing dollars. For instance, transportation and distribution investments will naturally follow the types of companies in the suggested target families.

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, Assets & Challenges Assessment, and field visits, four business and industry families were chosen that best match Lockhart’s unique competitive advantages. Targets are grouped into families with similar themes, needs, or relative scale of projects the assets will attract. These targets are presented as collaborative, community targets led by LEDC or other relevant organizations to leverage the best resources to meet the needs of particular industry sectors. The four target families are *All Things Mega*, *Industry 4.0*, *Food Processing*, and *Experience Lockhart*.

Figure 7.1: Optimal Target Screening Process



- **All Things Mega**
- **Industry 4.0 (Manufacturing)**
- **Food Processing**
- **Experience Lockhart**

For each targeted business sector, the community’s competitive advantages are presented along with national trends and projections of the targets. Target sectors may be stagnant or losing jobs nationally, but the particular set of economic development assets in Lockhart position it to capture any growing demand to produce new jobs and improve gross domestic/regional product.

For each target, a list of individual subsectors with 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) is presented. This material can be used in marketing and community support efforts or to help economic development personnel prioritize targeting efforts.

Optimal Targets for Lockhart

All Things Mega	Industry 4.0
	
Ideal Large-Scale Manufacturers	Auto Parts, Metal & Electronic Manufacturing
<ul style="list-style-type: none"> • Semiconductor Manufacturing • Electronic Vehicle OEM • Battery Manufacturing 	<ul style="list-style-type: none"> • Auto Parts Mfg. • Computer & Peripheral Equipment Mfg. • Electrical Equipment & Component Mfg. • Metal Product Mfg. • Architectural & Structural Metals Mfg. • Ventilation, Heating, Air-Conditioning, & Refrigeration Equipment Mfg. • Metalworking Machinery Mfg. • Industrial Machinery Mfg. • Machine Shops
Food Processing	Experience Lockhart
	
Food & Beverage Manufacturing	Experiential Tourism & Hospitality
<ul style="list-style-type: none"> • Seasoning & Dressing Mfg. • Snack Food Mfg. • Specialty Food & Flavoring Mfg. • Fruit & Vegetable Processing • Frozen Food Mfg. • Soft Drink & Ice Mfg. • Bakeries & Tortilla Mfg. • Meat Processing • Animal Food Mfg. • Grocery Wholesalers • Refrigerated Warehousing & Storage 	<ul style="list-style-type: none"> • Full-Service Hotels • Retail Development • Wineries, Distilleries & Breweries • Festivals & Day-Trip Experiences

Note: Transportation and Logistics are an important part of these targets, particularly Industry 4.0 and Food Processing. Logistics and distribution will follow these industries organically without significant proactive marketing attention.



The “All Things Mega” target family is focused on the megasite in Caldwell County. A megasite is a large land site with sufficient utilities to support a large manufacturing user, usually from 1,000 to 2,000 acres of contiguous land for development. In the past several years there has been an increase in large-scale projects that are in search of megasites and a shift in the types of industries in play. These mega-projects have high capital investments and large job creation numbers which emphasize the need to be near large population centers.

The greater Austin Metro is home to more than 45,000 production 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 a labor force of 845,000 with nearly 60,000 Manufacturing employees. While the competition for talent remains strong, the sheer number of manufacturing talent in the region is positive.

The stress on global supply chains during and after the COVID-19 pandemic increased the need to bring some industries to the United States – particularly semiconductor manufacturing. The rise of electric vehicle production and related industries such as battery manufacturing has also boomed in recent years as the nation transitions to meet green energy goals. The nearby Tesla factory, or “Giga Texas”, a 10 million-square-foot factory, announced plans to expand in 2023 to continue its manufacturing of the Model Y and future Cybertruck production.

The focus of this target family will be on the attraction of semiconductor manufacturers along with electronic vehicle OEMs (Original Equipment Manufacturers or OEMs), and battery manufacturers. While not within the city limits of Lockhart, the close proximity of this land and the types of projects it will attract make it a potentially transformational development. A mega-project will impact the entire region and bring ancillary businesses for years to come.

Target rationales include:

- Availability of megasite (P)
- Positioned to serve regional, national & 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 tax-exempt financing for new industrial facilities (P)
- Availability of local incentives (P)
- Relatively low cost of living (P)(C)
- Relatively low property taxes (P)(C)
- Historical national 10-year GDP growth of 59.5% (P)(C)
- Historical national 10-year job growth of 35% (P)(C)
- National. job growth forecast 2.6% for next decade (P)(C)
- Caldwell County growth forecast 16.4% for next decade (P)(C)
- National average wage \$129,847 (C)
- 13,689 degrees and certificates granted in majors related to target (P)

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

Table 7.1 All Things Mega Target Job & GDP Trend & Outlook, 2022

NAICS	Industry	United States			Caldwell County		
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-Year Employment Change %	10-Year Employment Forecast %	LQ
334413	Semiconductor Device Mfg.	48.2%	5.0%	3.3%	n/a	16.5%	0.29
335910	Battery Mfg.	117.8%	70.7%	16.8%	n/a	7.8%	n/a
3361	Motor Vehicle Mfg.	72.7%	62.4%	6.6%	n/a	13.1%	n/a
Total Target		59.5%	35.0%	6.2%	n/a	16.4%	0.11

Source: JobsEQ 2022, Garner Economics, GDP figures represent 2021 data.

Occupations

The top occupations for the All Things Mega target are a mix of jobs from a variety of fields and are derived from studying staffing patterns in the target industry family. These occupations are listed with employment levels from several different aspects:

1. Workers who live in Caldwell County within that occupation category, regardless of where they work.
2. Those who work at companies located in Caldwell County, regardless of where workers reside.
3. Net commuting compares residents and workers in each occupation. This figure is to assess talent potential.

The comparison of residents and workers shows net commuting and is an indicator of supply and demand at a high level for the occupation. This net commuter figure show how the supply of residents matches – again from a broad perspective – jobs for the occupational group. A positive number of net commuters means it is likely that commuters are entering the city or county for work, while a negative figure indicates commuters leaving the area for employment.

Education and training levels needed for entry into target occupations vary from no education needed and short-term on-the-job training to requiring a certificate, five years of experience, or moderate-term on-the-job training. Occupations in Table 7.2 show a variety of typical requirements showing the need for higher education and technical training.

The 2020 Strategic Plan recommended that workforce training initiatives should be explored to offer postsecondary vocational training at an ISD facility, either in partnership with Austin Community College (ACC) or Texas State Technical College (TSTC). It is noted that this effort has started by the Lockhart EDC. However, the “All Things Mega” target projects will likely have large employment requirements and workforce development programs will be in demand. **Vocational training and partnerships with ACC or TSTC are critical to recruiting mega users to Lockhart.**

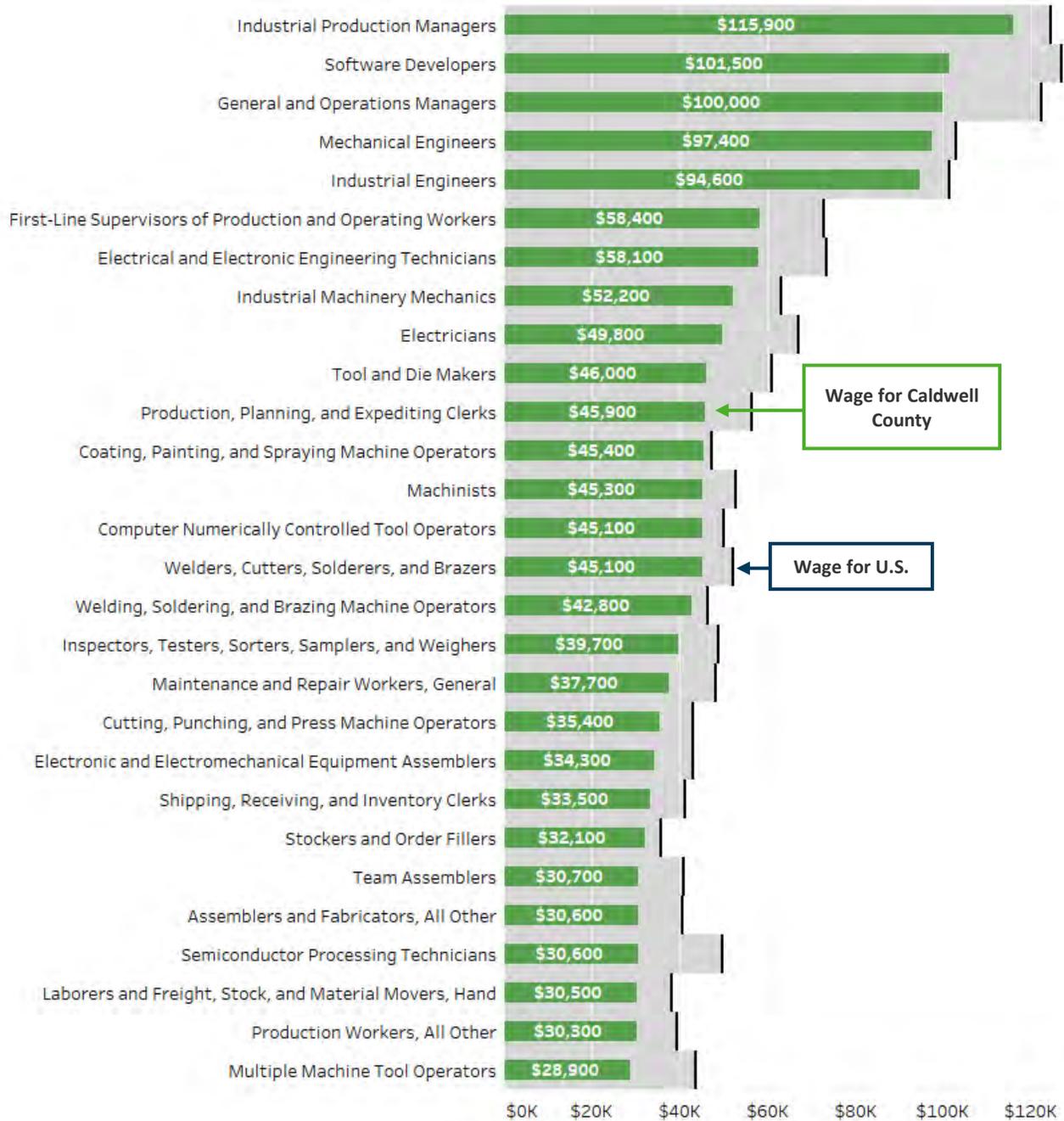
Table 7.2 All Things Mega Target Top Occupations, 2022
Sorted by Employment-Live within Caldwell County

SOC	Occupation	Employment (Live in County)	Employment (Work in County)	Net Commuters	Typical Education & Training
53-7065	Stockers and Order Fillers	389	172	-217	HS, Short-term
11-1021	General and Operations Managers	347	226	-120	B, 5 yrs+
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	316	77	-239	Short-term
49-9071	Maintenance and Repair Workers, General	234	92	-142	HS, Moderate
47-2111	Electricians	166	106	-60	HS, Apprenticeship
51-2092	Team Assemblers	134	38	-96	
43-5071	Shipping, Receiving, and Inventory Clerks	128	37	-91	HS, Short-term
51-4121	Welders, Cutters, Solderers, and Brazers	113	33	-79	HS, Moderate
51-1011	First-Line Supervisors of Production and Operating Workers	83	39	-44	HS, <5 yrs
49-9041	Industrial Machinery Mechanics	79	34	-45	HS, Long-term
15-1252	Software Developers	60	45	-15	B
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	60	28	-32	HS, Moderate
51-4041	Machinists	58	15	-43	HS, Long-term
51-2099	Assemblers and Fabricators, All Other	43	8	-35	
51-2028	Electrical, Electronic, and Electromechanical Equipment Assemblers	40	2	-39	HS, Moderate
51-9124	Coating, Painting, and Spraying Machine Operators	32	8	-25	HS, Moderate
51-9199	Production Workers, All Other	28	5	-22	HS, Moderate
51-9161	Computer Numerically Controlled Tool Operators	25	8	-18	HS, Moderate
51-4081	Multiple Machine Tool Operators	23	4	-19	HS, Moderate
51-4031	Cutting, Punching, and Press Machine Operators	23	4	-19	HS, Moderate
51-9141	Semiconductor Processing Technicians	14	1	-13	HS, Moderate
43-5061	Production, Planning, and Expediting Clerks	13	17	4	HS, Moderate
51-4122	Welding, Soldering, and Brazing Machine Operators	10	1	-9	HS, Moderate
51-4111	Tool and Die Makers	8	2	-5	C, Long-term
17-3023	Electrical and Electronic Engineering Technicians	7	3	-4	A
11-3051	Industrial Production Managers	6	11	5	B, 5 yrs+
17-2112	Industrial Engineers	5	9	3	B
17-2141	Mechanical Engineers	4	7	3	B

Source: JobsEQ, 2022 Average. Employment — Work in County represents those employed by companies located in Caldwell County regardless of where workers reside. Employment — Live in County represents those who reside in Caldwell County regardless of where they work.

Typical Education & Training shows the typical education, on-the-job training, and experience needed to work in a given occupation. Legend: HS-High School, B-Bachelor Degree, C-Certification, Some College-College courses no degree.

**Figure 7.2: All Things Mega Target Wages for Top Occupations, 2022
Caldwell County, United States**



Source: JobsEQ, 2022 Average Annual Salary, Garner Economics

Table 7.3 Regional Degree Completions in Majors Related to Target, 2021

Degrees by Area of Study	Certificate	Associate	Bachelor	Graduate or Professional	Number of Degrees 2021
Business, Management & Marketing	650	500	2,826	1,412	5,388
Communication & Related Programs	42	99	2,110	130	2,381
Engineering	57	97	1,441	650	2,245
Computer & Information Sciences	718	300	859	326	2,203
Mathematics & Statistics	97	35	377	124	633
Engineering Technologies	218	91	174	25	508
Precision Production	151	36			187
Mechanic & Repair Technologies	81	22			103
Communications Technologies	13	9	19		41
Grand Total	2,027	1,189	7,806	2,667	13,689

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

Source: National Center for Education Statistics, Garner Economics



The Industry 4.0 target family brings together manufacturing-oriented sectors that build on the assets of Lockhart. Industry 4.0 represents the “next industrial revolution” and highlights the advances of digitization and connectivity or integration. At the core of this are the adoption of computers and automation and the connection to smart and autonomous systems that can ultimately be run without human interaction. While this may not be a reality for every manufacturer today, smart components and the analysis of data are helping to optimize operations and problem-solve irregularities or costly mistakes.

This target includes Auto Parts, Metalworking, Computer, and Electronics Manufacturing. Auto Parts suppliers remain a strong target component due to local manufacturing talent and the proximity of Lockhart to four vehicle assembly plants – Tesla’s Giga Texas, GM (Arlington), Peterbilt (Denton), and Toyota (San Antonio). Austin is known for technology and electronics anchored by tech giants such as Apple and Dell, which is homegrown and headquartered in the region. These high-profile companies help focus attention on what the region is good at, and Lockhart can leverage this.

Caldwell County has nearly 600 people employed in Manufacturing, with an industry average wage of \$54,000 as of 2022. The number of production workers who live in Caldwell County is almost 1,500 while only 500 production jobs are located in the county leaving a net loss of at least 959 workers leaving Caldwell County for their production jobs. This is a set of individuals who could be recruited for local jobs depending on matching skill sets.

Pure Castings Company is a great example of operations that will flourish in Lockhart. This metalworking company manufactures precision investment castings for a variety of industries.

Target rationales include:

- Availability of industrial sites (P)
- Positioned to serve regional, national & 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 tax-exempt financing for new industrial facilities (P)
- Availability of local incentives (P)
- Relatively low cost of living (P)(C)
- Relatively low property taxes (P)(C)
- Historical national 10-year GDP growth of 46% (P)(C)
- Historical national 10-year job growth of 6% (P)(C)
- Caldwell County growth forecast 12% for next decade (P)(C)
- National average wage \$82,725 (C)
- 13,689 degrees and certificates granted in majors related to target (P)

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

Table 7.4 Industry 4.0 Target Job & GDP Trend & Outlook, 2022

NAICS	Industry	United States			Caldwell County		
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-Year Employment Change %	10-Year Employment Forecast %	LQ
3321	Forging & Stamping	3.7%	-6.8%	-4.1%	73.5%	10.7%	0.03
3323	Architectural & Structural Metals Mfg.	46.1%	16.5%	3.7%	40.6%	21.4%	0.07
3325	Hardware Mfg.	20.2%	4.4%	-4.1%	73.0%	10.7%	0.05
3326	Spring & Wire Product Mfg.	17.1%	-3.4%	-4.1%	22.7%	10.7%	0.04
3327	Machine Shops	12.4%	-7.0%	5.1%	-46.4%	20.9%	1.07
3329	Other Fabricated Metal Product Mfg.	26.7%	1.8%	-4.1%	-48.7%	9.4%	0.38
3332	Industrial Machinery Mfg.	52.5%	23.4%	-11.7%	-52.7%	1.8%	2.79
3334	Ventilation, Heating, Air-Conditioning, & Commercial Refrigeration Equip. Mfg.	33.3%	12.8%	-11.8%	-98.1%	11.7%	0.03
3335	Metalworking Machinery Mfg.	17.3%	-8.7%	-12.8%	151.7%	29.3%	0.13
3341	Computer & Peripheral Equipment Mfg.	101.5%	2.4%	4.8%	-20.7%	12.6%	0.01
3353	Electrical Equipment Mfg.	23.8%	-1.6%	1.1%	-19.5%	9.1%	0.02
3359	Other Electrical Equipment & Component Mfg.	61.6%	19.9%	16.7%	-2.4%	7.8%	0.02
3363	Motor Vehicle Parts Mfg.	50.6%	14.0%	1.1%	-39.1%	11.7%	0.03
Total Target		46.1%	6.0%	0.1%	-52.4%	11.9%	0.35

Source: JobsEQ 2022, Garner Economics, GDP figures represent 2021 data.

Occupations

The Industry 4.0 top occupations for the target are a mix of jobs from production and support positions to engineering and other technical fields. The top roles for this target are found by analyzing staffing patterns in the target industry family NAICS codes. Employment levels are shown from several different perspectives:

1. Workers who live in Caldwell County within that occupation category, regardless of where they work.
2. Those who work at companies located in Caldwell County, regardless of where workers reside.
3. Net commuting compares residents and workers in each occupation. This figure is to assess talent potential.

The comparison of residents and workers shows net commuting and is an indicator of supply and demand at a high level for the occupation. This net commuter figure show how the supply of residents matches – again from a broad perspective – jobs for the occupational group. A positive number of net commuters means it is likely that commuters are entering the city or county for work, while a negative figure indicates commuters leaving the area for employment.

Education and training levels needed for entry into target occupations include a few that need no education needed or on-the-job training to those requiring a certificate or degree, on-the-job training or certifications or degrees relevant to the role. Occupations in Table 7.5 show a variety of typical requirements showing the need for higher education and technical training.

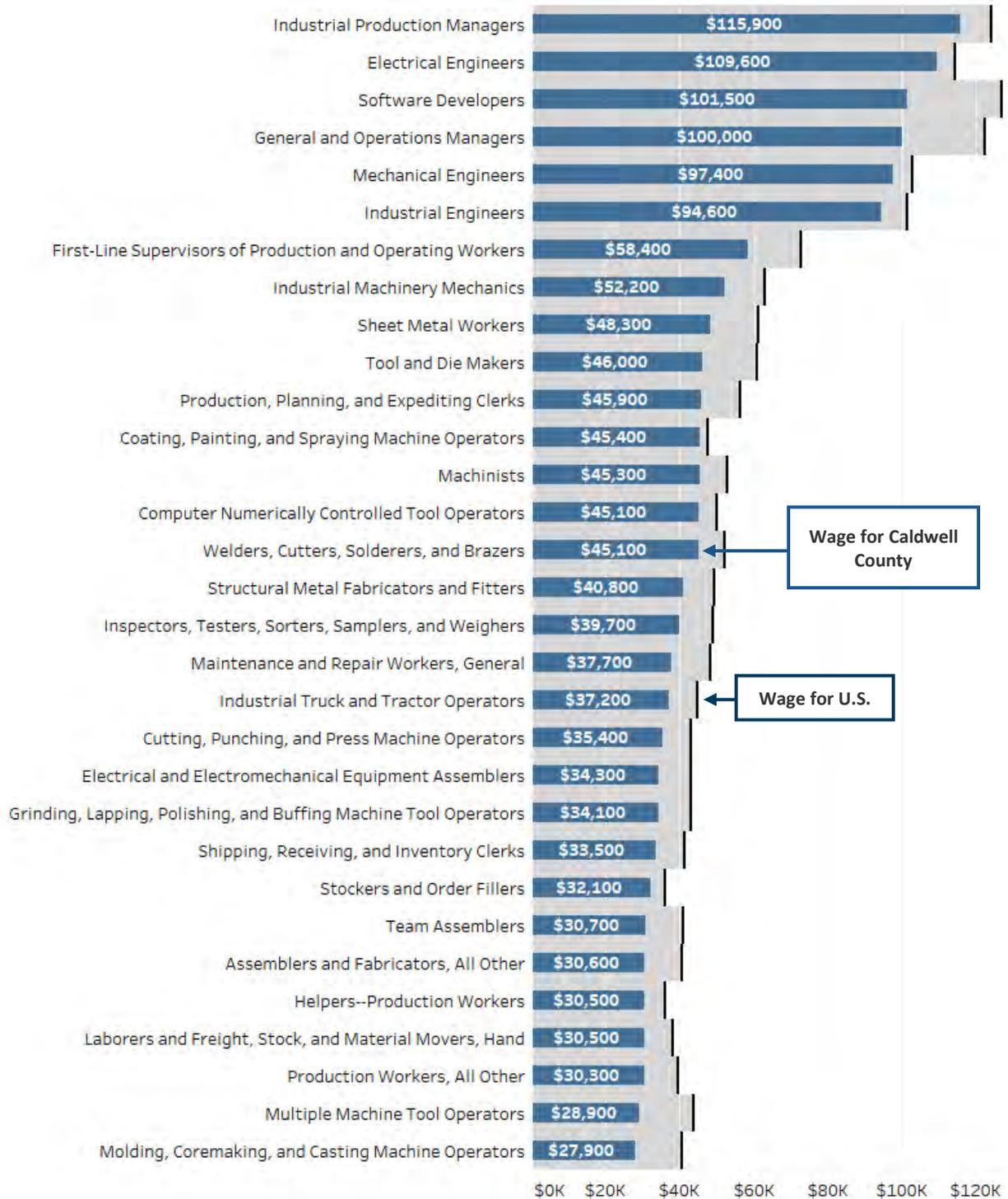
Table 7.5 Industry 4.0 Target Top Occupations, 2022
Sorted by Employment-Live within Caldwell County

SOC	Occupation	Employment (Live in County)	Employment (Work in County)	Net Commuters	Typical Education & Training
53-7065	Stockers and Order Fillers	389	172	-217	HS, Short-term
11-1021	General and Operations Managers	347	226	-120	B, 5 yrs+
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	316	77	-239	Short-term
49-9071	Maintenance and Repair Workers, General	234	92	-142	HS, Moderate
53-7051	Industrial Truck and Tractor Operators	163	21	-143	Short-term
51-2092	Team Assemblers	134	38	-96	
43-5071	Shipping, Receiving, and Inventory Clerks	128	37	-91	HS, Short-term
51-4121	Welders, Cutters, Solderers, and Brazers	113	33	-79	HS, Moderate
51-1011	First-Line Supervisors of Production and Operating Workers	83	39	-44	HS, < 5 yrs
49-9041	Industrial Machinery Mechanics	79	34	-45	HS, Long-term
15-1252	Software Developers	60	45	-15	B
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	60	28	-32	HS, Moderate
51-4041	Machinists	58	15	-43	HS, Long-term
51-2099	Assemblers and Fabricators, All Other	43	8	-35	
51-9198	Helpers--Production Workers	42	10	-32	HS, Short-term
51-2028	Electrical and Electromechanical Equipment Assemblers	40	2	-39	HS, Moderate
47-2211	Sheet Metal Workers	36	10	-26	HS, Apprenticeship
51-9124	Coating, Painting, and Spraying Machine Operators	32	8	-25	HS, Moderate
51-9199	Production Workers, All Other	28	5	-22	HS, Moderate
51-4072	Molding, Coremaking, and Casting Machine Operators, Metal and Plastic	26	11	-15	HS, Moderate
51-9161	Computer Numerically Controlled Tool Operators	25	8	-18	HS, Moderate
51-4081	Multiple Machine Tool Operators, Metal and Plastic	23	4	-19	HS, Moderate
51-4031	Cutting, Punching, and Press Machine Operators, Metal and Plastic	23	4	-19	HS, Moderate
51-2041	Structural Metal Fabricators and Fitters	16	3	-13	HS, Moderate
43-5061	Production, Planning, and Expediting Clerks	13	17	4	HS, Moderate
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Operators	13	7	-6	HS, Moderate
51-4111	Tool and Die Makers	8	2	-5	C, Long-term
11-3051	Industrial Production Managers	6	11	5	B, 5 yrs+
17-2112	Industrial Engineers	5	9	3	B
17-2141	Mechanical Engineers	4	7	3	B
17-2071	Electrical Engineers	2	5	3	B

Source: JobsEQ, 2022 Average. Employment — Work in County represents those employed by companies located in Caldwell County regardless of where workers reside. Employment — Live in County represents those who reside in Caldwell County regardless of where they work.

Typical Education & Training shows the typical education, on-the-job training, and experience needed to work in a given occupation. Legend: HS-High School, B-Bachelor Degree, C-Certification, Some College-College courses no degree.

**Figure 7.3: Industry 4.0 Target Wages for Top Occupations, 2022
Caldwell County, United States**



Source: JobsEQ, 2022 Average Annual Salary, Garner Economics

Table 7.6 Regional Degree Completions in Majors Related to Target, 2021

Degrees by Area of Study	Certificate	Associate	Bachelor	Graduate or Professional	Number of Degrees 2021
Business, Management & Marketing	650	500	2,826	1,412	5,388
Communication & Related Programs	42	99	2,110	130	2,381
Engineering	57	97	1,441	650	2,245
Computer & Information Sciences	718	300	859	326	2,203
Mathematics & Statistics	97	35	377	124	633
Engineering Technologies	218	91	174	25	508
Precision Production	151	36			187
Mechanic & Repair Technologies	81	22			103
Communications Technologies	13	9	19		41
Grand Total	2,027	1,189	7,806	2,667	13,689

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

Source: National Center for Education Statistics, Garner Economics



Food Processing



The Food and Beverage industry continues to grow nationally with a 47% increase in Gross Domestic Product (GDP) and a 12% rise in employment over the past decade for this particular target family. United States employment in this target is forecast to grow by 2.5% while Caldwell County is predicted to increase by 20%.

Lockhart is well situated for Food and Beverage Processing with ample water, proximity to regional and national markets, and proximity to agricultural products. *Animal Food* and *Snack Food* manufacturing have a high concentration of employment within Caldwell County with location quotients (a measure of concentration) of 4.58 and 3.93 respectively for those subsectors. In general, an LQ above 1.2 is a good indicator of specialization.

Consumer trends toward healthy, fresh, organic, and local foods are here to stay with particular attention on convenience and ready-to-eat. In fact with both in-person grocers and meal delivery services like Blue Apron or Hello Fresh, processing for convenience adds value to the preparation of raw foods for eating at home.

Refrigerated storage is another part of this target that is in high demand and is recommended to support Food & Beverage Processing. The U.S. currently has 3.7 billion cubic feet of gross refrigerated storage capacity, up by 2.2% from 2020, according to the USDA. Cold storage demand follows population changes with Lockhart's proximity to the Austin and San Antonio regions becoming another asset in the ability to attract this subsector.

A prime example of how Lockhart assets can attract *Food and Beverage Processing* is the recent announcement of Ziegenfelder Company establishing a new frozen dessert manufacturing facility in the City. Predating this development, Iron Ox opened a greenhouse facility in Lockhart growing produce with the technology of AI and robots.

The Food & Beverage Processing target is a natural fit for Lockhart for many reasons, but none more satisfying than touting the City's renowned reputation for Texas barbeque.

Target rationales include:

- Availability of industrial sites (P)
- Positioned to serve regional, national & international markets (P)
- Agricultural product in region (P)
- Availability of water/wastewater treatment capacity (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 tax-exempt financing for new industrial facilities (P)
- Availability of local incentives (P)
- Relatively low cost of living (P)(C)
- Relatively low property taxes (P)(C)
- Historical national 10-year GDP growth of 47% (P)(C)
- Historical national 10-year job growth of 12% (P)(C)
- National job growth forecast 2.6% for next decade (P)(C)
- Caldwell County growth forecast 20% for next decade (P)(C)
- National average wage \$62,567 (C)
- 14,503 degrees and certificates granted in majors related to target (P)

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

Table 7.7 Food & Beverage Processing Target Job & GDP Trend & Outlook

NAICS	Industry	United States			Caldwell County		
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-Year Employment Change %	10-Year Employment Forecast %	LQ
3111	Animal Food Mfg.	67.1%	34.7%	3.0%	-48.6%	16.4%	4.58
3116	Meat Processing	70.4%	9.4%	1.2%	152.5%	17.3%	0.04
3118	Bakeries & Tortilla Mfg.	40.9%	14.9%	5.1%	-77.6%	52.9%	0.08
31141	Frozen Food Mfg.	52.2%	9.4%	1.0%	-98.1%	15.2%	0.01
31142	Fruit & Vegetable Preservation	28.6%	-1.0%	1.0%	-43.9%	15.2%	0.04
31191	Snack Food Mfg.	54.5%	27.4%	7.6%	n/a	21.0%	3.93
31193	Flavoring Syrup & Concentrate Mfg.	-64.1%	-8.3%	7.5%	-54.1%	16.5%	0.05
31194	Seasoning & Dressing Mfg.	66.6%	36.2%	7.5%	-47.2%	16.5%	0.06
31211	Soft Drink & Ice Mfg.	42.5%	13.1%	2.8%	n/a	16.4%	0.06
4244	Grocery Wholesalers	48.0%	8.9%	1.5%	-97.6%	-5.3%	0.00
49312	Refrigerated Warehousing	32.8%	40.8%	8.5%	60.6%	27.0%	0.01
Total Target		47.3%	12.1%	2.6%	-35.7%	19.6%	0.29

Source: JobsEQ 2022, Garner Economics, GDP figures represent 2021 data.

Occupations

The top occupations for the Food & Beverage Processing target include production roles as well as food handling and agriculture-related occupations. Analysis of staffing patterns in the target industry revealed those with the highest employment and are listed here in several different ways:

1. Workers who live in Caldwell County within that occupation category, regardless of where they work.
2. Those who work at companies located in Caldwell County, regardless of where workers reside.
3. Net commuting compares residents and workers in each occupation. This figure is to assess talent potential.

The comparison of residents and workers shows net commuting and is an indicator of supply and demand at a high level for the occupation. This net commuter figure show how the supply of residents matches – again from a broad perspective – jobs for the occupational group. A positive number of net commuters means it is likely that commuters are entering the city or county for work, while a negative figure indicates commuters leaving the area for employment.

Education and training levels needed for entry into target occupations in the Food and Beverage sector have many which require short and moderate on-the-job training with a few management positions typically needing individuals with degrees and years of experience. Occupations in Table 7.82 show a variety of typical requirements showing the need for higher education and technical training. Roles needing short and moderate training can benefit greatly from community or technical college programs. In the competitive site selection process, offering ways a company can advance its production schedule by pre-training workers can make the difference in winning the project.

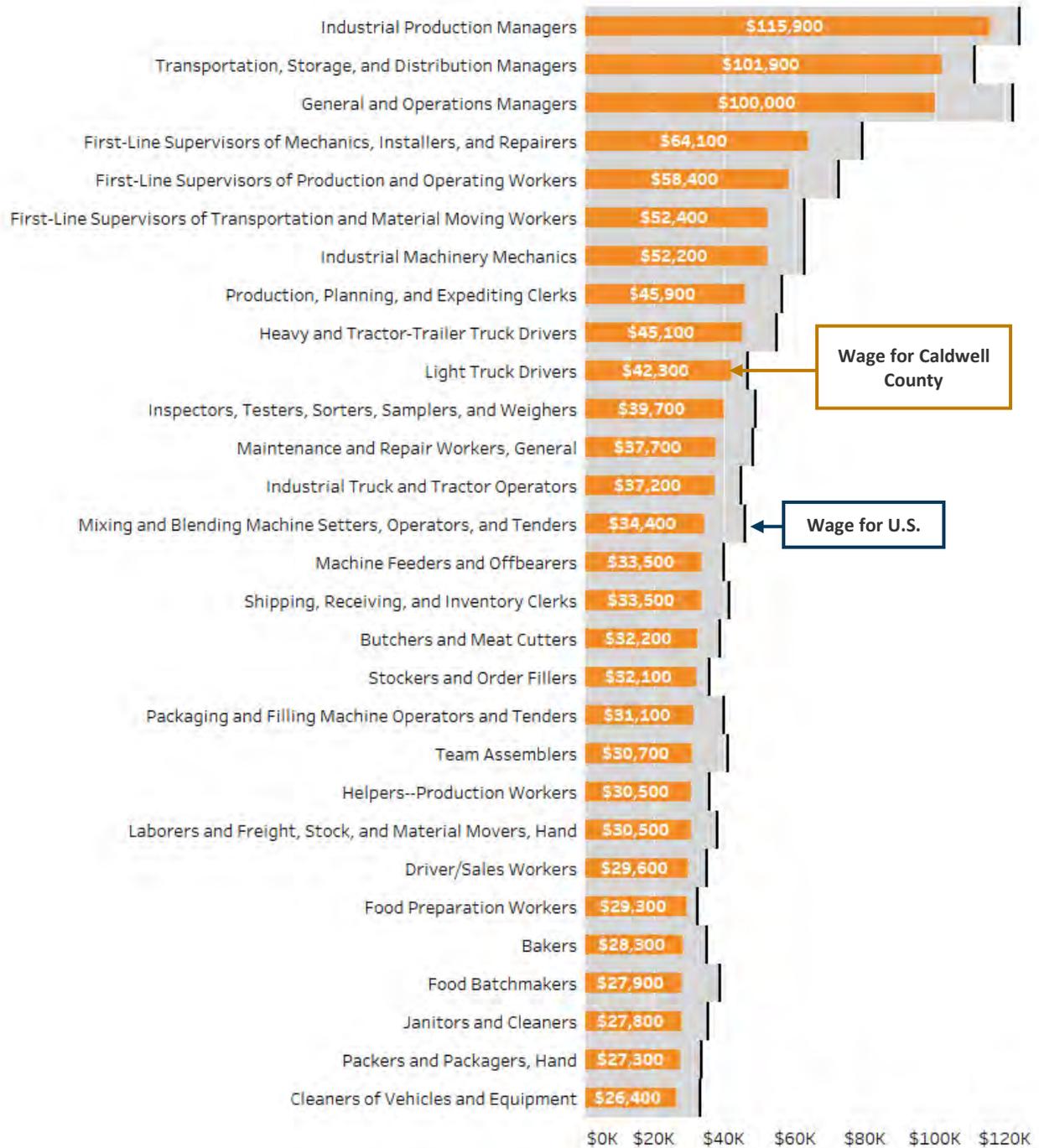
Table 7.8 Food & Beverage Processing Target Top Occupations, 2022
Sorted by Employment-Live within Caldwell County

SOC	Occupation	Employment (Live in County)	Employment (Work in County)	Net Commuters	Typical Education & Training
37-2011	Janitors and Cleaners	401	183	-218	Short-term
53-7065	Stockers and Order Fillers	389	172	-217	HS, Short-term
11-1021	General and Operations Managers	347	226	-120	B, 5 yrs+
53-3032	Heavy and Tractor-Trailer Truck Drivers	321	134	-187	C, Short-term
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	316	77	-239	Short-term
49-9071	Maintenance and Repair Workers, General	234	92	-142	HS, Moderate
35-2021	Food Preparation Workers	210	82	-128	Short-term
53-7051	Industrial Truck and Tractor Operators	163	21	-143	Short-term
53-3033	Light Truck Drivers	142	42	-100	Short-term
51-2092	Team Assemblers	134	38	-96	
43-5071	Shipping, Receiving, and Inventory Clerks	128	37	-91	HS, Short-term
53-7064	Packers and Packagers, Hand	125	20	-105	Short-term
53-7061	Cleaners of Vehicles and Equipment	124	34	-89	Short-term
53-3031	Driver/Sales Workers	119	49	-70	HS, Short-term
51-1011	First-Line Supervisors of Production and Operating Workers	83	39	-44	HS, < 5 yrs
49-9041	Industrial Machinery Mechanics	79	34	-45	HS, Long-term
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	77	41	-36	HS, < 5 yrs
53-1047	First-Line Supervisors of Transportation and Material Moving Workers	74	37	-37	HS, < 5 yrs
51-9111	Packaging and Filling Machine Operators	70	15	-56	HS, Moderate
51-3021	Butchers and Meat Cutters	60	14	-46	Long-term
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	60	28	-32	HS, Moderate
51-3011	Bakers	54	17	-36	Moderate
51-9198	Helpers--Production Workers	42	10	-32	HS, Short-term
51-3092	Food Batchmakers	34	8	-26	HS, Moderate
51-9023	Mixing and Blending Machine Operators	20	7	-13	HS, Moderate
53-7063	Machine Feeders and Offbearers	17	3	-14	Short-term
43-5061	Production, Planning, and Expediting Clerks	13	17	4	HS, Moderate
11-3071	Transportation, Storage, and Distribution Managers	8	5	-3	HS, 5 yrs+
11-3051	Industrial Production Managers	6	11	5	B, 5 yrs+

Source: JobsEQ, 2022 Average. Employment — Work in County represents those employed by companies located in Caldwell County regardless of where workers reside. Employment — Live in County represents those who reside in Caldwell County regardless of where they work.

Typical Education & Training shows the typical education, on-the-job training, and experience needed to work in a given occupation. Legend: HS-High School, B-Bachelor Degree, C-Certification, Some College-College courses no degree.

**Figure 7.4: Food & Beverage Processing Target Wages for Top Occupations, 2022
Caldwell County, United States**



Source: JobsEQ, 2022 Average Annual Salary, Garner Economics

Table 7.9 Regional Degree Completions in Majors Related to Target, 2021

Degrees by Area of Study	Certificate	Associate	Bachelor	Graduate or Professional	Number of Degrees 2021
Business, Management & Marketing	650	500	2,826	1,412	5,388
Communication & Related Programs	42	99	2,110	130	2,381
Engineering	57	97	1,441	650	2,245
Computer & Information Sciences	718	300	859	326	2,203
Family & Consumer Sciences	14	6	609	43	672
Mathematics & Statistics	97	35	377	124	633
Engineering Technologies	218	91	174	25	508
Culinary, Entertainment & Personal Services	30	242			272
Precision Production	151	36			187
Agricultural & Related Fields		10	125	7	142
Mechanic & Repair Technologies	81	22			103
Communications Technologies	13	9	19		41
Grand Total	2,041	1,205	8,540	2,717	14,503

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



“Experiential” has become a popular term for retail, hospitality, and tourism industries and is focused on people placing as much value on the experience as the actual service or good. The ambiance of a store. The grass-roots feel of a charming downtown with homegrown restaurants. The ability to offer unique and memorable experiences for visitors and residents alike makes the Experience Lockhart target a tool for talent retention and attraction. Quality of life was identified as the second most important factor in site selection based on *Area Development Magazine’s* 2022 Corporate Survey making this target a valuable part of Lockhart’s strategy.

Lockhart’s current downtown (central business district) renaissance is prime for being a major focus for this effort. Target subsectors such as specialty retail along with breweries, wineries, and distilleries would be a good fit for downtown helping to round out current establishments already thriving. The support and financial incentives for downtown development will help spur the growth of these businesses.

One of the recommendations given in this report is to recruit a hotel developer to help improve the quality of life assets in Lockhart. A quality hotel can host business clients and visitors and help stretch any day trips for regional tourism into overnight stays boosting retail and food sales in Lockhart.

One of the most popular forms of experiential travel is culinary tourism. With Lockhart reigning as the Barbeque Capital of Texas, the City is a natural fit. This fact already helps to draw tourists and the BBQ festival enhances that pull for visitors. Additional festivals and events could also bring in more regional attendees with the culinary factor always playing a role in attracting the foodies among festival goers. Another recommendation offered in this strategy is the formation of a Convention and Visitors Bureau to focus on these types of events that can draw visitors and additional revenue to Lockhart.

Target rationales include:

- Positioned to serve regional market (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 tax-exempt financing for new industrial facilities (P)
- Availability of local incentives (P)
- Relatively low cost of living (P)(C)
- Relatively low property taxes (P)(C)
- Historical national 10-year GDP growth of 40% (P)(C)
- National. job growth forecast 10% for next decade (P)(C)
- Caldwell County historical job growth of 38% (P)(C)
- Caldwell County growth forecast 16% for next decade (P)(C)
- 11,060 degrees and certificates granted in majors related to target (P)

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

Table 7.10 Experience Lockhart Target Job & GDP Trend & Outlook

NAICS	Industry	United States			Caldwell County		
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-Year Employment Change %	10-Year Employment Forecast %	LQ
72111	Hotels	5.8%	-1.7%	22.8%	-12.0%	32.7%	0.26
31212	Breweries	100.4%	255.7%	2.8%	n/a	17.1%	0.06
31213	Wineries	114.7%	65.1%	2.8%	241.0%	17.1%	0.11
31214	Distilleries	100.4%	210.2%	2.8%	n/a	17.1%	0.09
4452	Specialty Food Retailers	53.8%	0.9%	-5.0%	136.8%	9.1%	1.46
4581	Clothing & Clothing Accessories Retailers	35.0%	-21.5%	1.4%	198.1%	12.2%	0.64
4583	Jewelry, Luggage, & Leather Goods Retailers	38.9%	-15.1%	0.8%	-67.4%	-3.7%	0.08
4599	Other Miscellaneous Retailers	121.4%	30.9%	2.1%	-2.8%	14.1%	0.97
Total Target		40.3%	-1.0%	9.8%	37.8%	16.0%	0.55

Source: JobsEQ 2022, Garner Economics, GDP figures represent 2021 data.

Occupations

The top occupations for the Experience Lockhart target trend toward retail and service positions with a few roles on the inventory and stocking side of these business sectors. Again, a look at staffing patterns highlights those jobs that had high employment levels relevant to the types of businesses in the target family. These occupations are listed with employment levels from several different aspects:

1. Workers who live in Caldwell County within that occupation category, regardless of where they work.
2. Those who work at companies located in Caldwell County, regardless of where workers reside.
3. Net commuting compares residents and workers in each occupation. This figure is to assess talent potential.

The comparison of residents and workers shows net commuting and is an indicator of supply and demand at a high level for the occupation. This net commuter figure show how the supply of residents matches – again from a broad perspective – jobs for the occupational group. A positive number of net commuters means it is likely that commuters are entering the city or county for work, while a negative figure indicates commuters leaving the area for employment.

Education and training levels needed for entry into target occupations vary from short-term on-the-job training to those requiring a certificate or degree and/or years of experience, or moderate-term on-the-job training. Occupations in Table 7.11 show a variety of typical requirements showing the need for higher education and technical training.

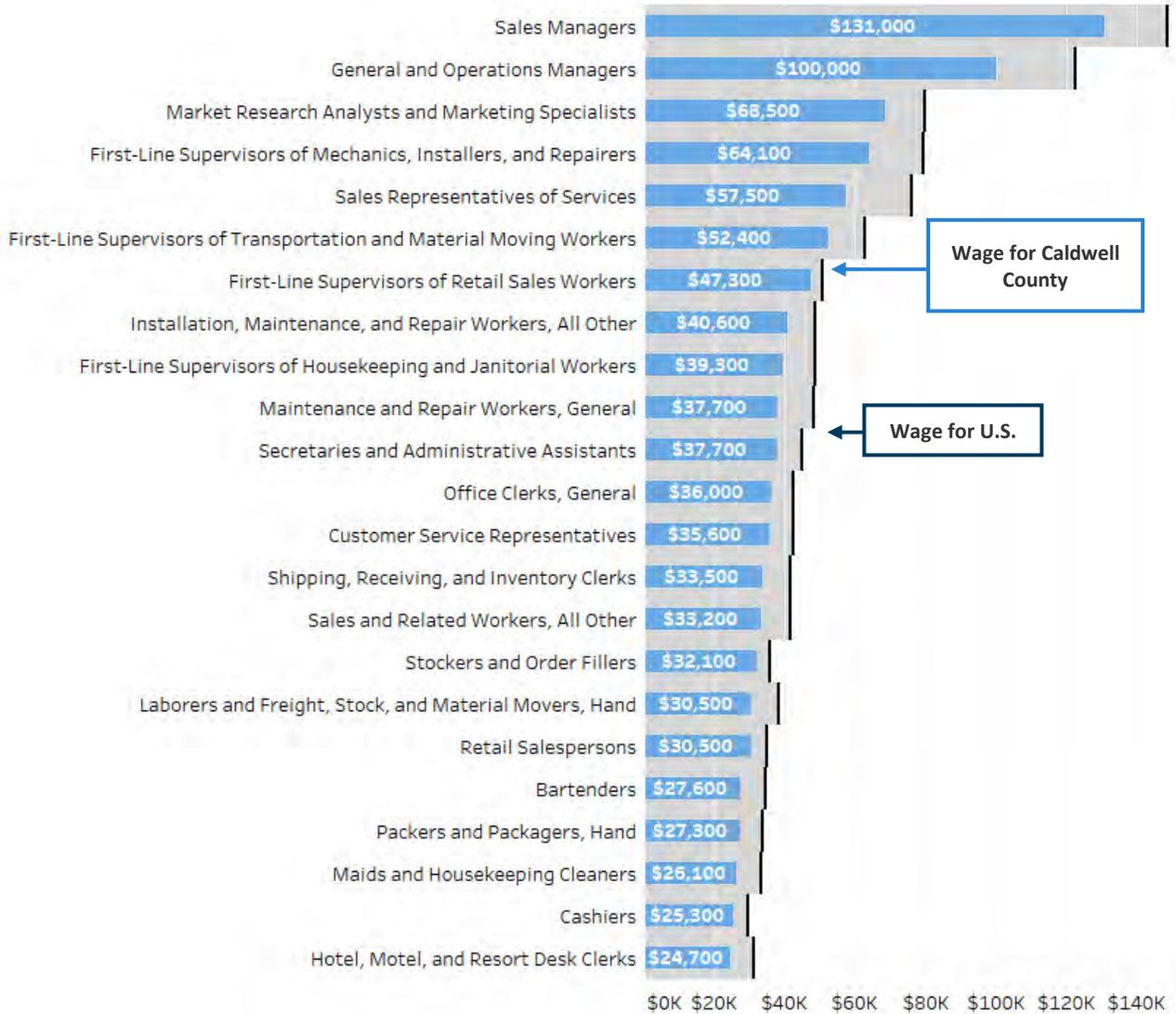
Table 7.11 Experience Lockhart Target Top Occupations, 2022
Sorted by Employment-Live within Caldwell County

SOC	Occupation	Employment (Live in County)	Employment (Work in County)	Net Commuters	Typical Education & Training
41-2011	Cashiers	770	557	-212	Short-term
41-2031	Retail Salespersons	484	285	-199	Short-term
53-7065	Stockers and Order Fillers	389	172	-217	HS, Short-term
11-1021	General and Operations Managers	347	226	-120	B, 5 yrs+
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	316	77	-239	Short-term
43-9061	Office Clerks, General	294	162	-132	HS, Short-term
43-4051	Customer Service Representatives	259	127	-132	HS, Short-term
37-2012	Maids and Housekeeping Cleaners	255	77	-178	Short-term
49-9071	Maintenance and Repair Workers, General	234	92	-142	HS, Moderate
41-1011	First-Line Supervisors of Retail Sales Workers	226	179	-48	HS, < 5 yrs
43-6014	Secretaries and Administrative Assistants	206	129	-77	HS, Short-term
43-5071	Shipping, Receiving, and Inventory Clerks	128	37	-91	HS, Short-term
53-7064	Packers and Packagers, Hand	125	20	-105	Short-term
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	77	41	-36	HS, < 5 yrs
53-1047	First-Line Supervisors of Transportation and Material Moving Workers	74	37	-37	HS, < 5 yrs
35-3011	Bartenders	63	25	-38	Short-term
37-1011	First-Line Supervisors of Housekeeping and Janitorial Workers	61	29	-33	HS, < 5 yrs
41-3091	Sales Representatives of Services	57	43	-14	HS, Moderate
49-9099	Installation, Maintenance, and Repair Workers, All Other	52	15	-37	HS, Moderate
43-4081	Hotel, Motel, and Resort Desk Clerks	33	5	-28	HS, Short-term
41-9099	Sales and Related Workers, All Other	14	22	8	HS
13-1161	Market Research Analysts and Marketing Specialists	11	19	7	B
11-2022	Sales Managers	11	18	7	B, < 5 yrs

Source: JobsEQ, 2022 Average. Employment — Work in County represents those employed by companies located in Caldwell County regardless of where workers reside. Employment — Live in County represents those who reside in Caldwell County regardless of where they work.

Typical Education & Training shows the typical education, on-the-job training, and experience needed to work in a given occupation. Legend: HS-High School, B-Bachelor Degree, C-Certification, Some College-College courses no degree.

**Figure 7.5: Experience Lockhart Target Wages for Top Occupations, 2022
Caldwell County, United States**



Source: JobsEQ, 2022 Average Annual Salary, Garner Economics

Table 7.12 Regional Degree Completions in Majors Related to Target, 2021

Degrees by Area of Study	Certificate	Associate	Bachelor	Graduate or Professional	Number of Degrees 2021
Business, Management & Marketing	650	500	2,826	1,412	5,388
Communication & Related Programs	42	99	2,110	130	2,381
Computer & Information Sciences	718	300	859	326	2,203
Family & Consumer Sciences	14	6	609	43	672
Culinary, Entertainment & Personal Services	30	242			272
Mechanic & Repair Technologies	81	22			103
Communications Technologies	13	9	19		41
Grand Total	1,548	1,178	6,423	1,911	11,060

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

Source: National Center for Education Statistics, Garner Economics

Chapter 8: Where Do We Go From Here?

In the initial strategy of 2020 titled ***A Competitive Realities Report and Target Industry Strategy for Lockhart, Texas***, Garner Economics offered 5 recommendations for the City and EDC to implement that were related to their organization, or a collective group of organizations needed to take on to enhance the competitiveness of the City. A scorecard of these recommendations and related progress is included in Chapter 2 of this report.

Both the 2020 strategy and the current plan were developed from a site selector’s perspective. The recommendations are built with an eye toward those areas that may differentiate the City.

Recommendations for action are categorized under two areas of opportunity: **Asset Development (Product Improvement)**, and **Execute Effectively (Organizational)**. These recommendations are developed with the thought that they can potentially have a significant positive impact on the area if implemented.

Asset Development

Product improvement initiatives to ensure Lockhart can compete to attract, retain, and grow the types of companies and talent the community desires.



1

Continue the City’s efforts to grow its industrial land inventory to accommodate the needs of the targeted industry sectors.

The City has been simply amazing in its success in attracting business over the last 3 years. Its recently developed industrial parks are sold out or close to being sold out. Without available product, the opportunity to attract business for a greenfield project will be non-existent (*No Product, No Project!*[®]). We recommend the City partner with private developers to create quality sites, or if necessary, independently.

Also, and equally important, the City should extend utility infrastructure to areas of the city with preferred development locations and “activate” the property for potential development. This would attract private developers to advance sites with the infrastructure already in place.

Funding for these efforts can be designated through Type B sales tax, or from the voluminous amount of Federal stimulus dollars still out there.



Asset Development
Product Improvement



2

Enhance Lockhart's Quality of Place by developing assets needed to build upon the City's quality of life.

Recruit a hotel developer: In the 2020 target industry strategy and recommendations, there was significant anecdotal feedback from businesses and individuals regarding utilizing accommodations properties outside of Lockhart, e.g. San Marcos and Austin, to host clients, customers, suppliers, and visitors rather than utilizing the one franchised hotel in Lockhart. This translates to a loss of sales tax revenue for the City, inconvenience for the guest, and a usual apology from the local business that there are no more options for a hotel/motel of a business standard in Lockhart.

The LEDC should work diligently to identify potential hotel developers for Lockhart and create an incentive package to attract that developer to build a quality, franchised property that includes business meeting space as part of the property. We are not recommending the development of a fully serviced conference center. Rather, many limited-service hotels, e.g., Hampton Inn, Hilton Garden Inn, Holiday Inn Express, etc., include meeting space as part of their real estate footprint to help with the economic viability and financial stability of the property. This is what we are suggesting for Lockhart. Texas Type B monies can be used for these types of projects (if meeting space is included).¹

¹ <https://comptroller.texas.gov/economy/local/type-ab/type-b.php>

Execute Effectively

Organizational adjustments and programming that allow the City to work proactively in those areas that will directly impact the economic growth the community desires.



Execute Effectively *Organizational*



1

Create a Convention and Visitor's Bureau (CVB) in Lockhart focused on visitor recruitment and hospitality product.

Lockhart is the Barbeque Capital of Texas! People from near and far know the city for its culinary treasure. Lockhart also has a charming downtown with its iconic County Courthouse. The city has spent nearly \$10 million on downtown improvement initiatives. When visiting Lockhart, it's evident there are lots of day trippers from the region enjoying the downtown collection of its boutique specialty shops, barbeque restaurants, and other culinary options.

In Chapter 7, the "Experience Lockhart" target, the focus is on visitors and residents having an enjoyable experience, which is an important goal and objective. But organizationally, more can be done to execute effectively. The city collects a 7% Hotel Occupancy Tax (HOT) that generated \$160,000 in 2022. By adding additional hotels or B&B properties, that number will increase. The CVB budget should be incrementally based on revenue growth and have a more proactive regional marketing campaign to attract visitors. Additionally, tourism is economic development. The LEDC should find ways to partner with the CVB to participate in creating initiatives, e.g., travel writer familiarization tours, consultant tours (during the BBQ festival), and more.

Organizationally, a dedicated person promoting tourism can be a part of the LEDC structure, funded by the HOT or funded by the LEDC until HOT funds have increased as a result of more beds and room nights taxed. A separate board of directors would make up the CVB governing board with individuals who have business or professional expertise related to the hospitality sector.

Alternatively, the CVB can be part of the Chamber of Commerce and partially funded through a contract with the City to fund the operations of the CVB. This structure is most effective where there is an effective and well-managed Chamber of Commerce, and government has a philosophy of having the private sector lead economic development and tourism promotion efforts. Based on our knowledge of the City and the effectiveness of the LEDC, we recommend that the City/LEDC lead this effort of operating a CVB, at least initially.

Chapter 9: Call to Action

With an advantageous location between Austin and San Antonio, strong population growth, effective public and private leadership, Lockhart has a wealth of amenities that make it an ideal location for investment. The City has invested (wisely) in creating industrial product with the development of new industrial parks. Now is not the time to take your foot off the gas pedal. The bar needs to be raised.

Through this report, ***Lockhart's Next Chapter: A targeted business strategy refresh***, community leaders can make long-term structural investments to ensure that the City can attract the types of activity it wants while also taking on game-changing initiatives to augment the area's quality of place assets.

To create such change, the City and its economic development office will facilitate dialogue with public and private leaders, continue to be more proactive rather than reactive, and execute its tourism promotion efforts differently. It will need to take the lead in proposing and attracting different types of activities and be a champion for long-term investments that will add to the community's product and quality of place for its citizens.

thank you

Garner Economics would like to thank the City of Lockhart, its economic development office led by Mike Kamerlander, and its city manager, Steve Lewis. Their feedback, 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.

Appendix A: Industry Sector Details

The industry listing below marks major categories in blue. Specialized industries have location quotients greater than 1.2 and are shaded.

NAICS	Industry Sector	Lockhart			Caldwell County		
		2022 Employment	5 Year Change	LQ	2022 Employment	5 Year Change	LQ
11	Agriculture, Forestry, Fishing and Hunting	84	-32	1.2	806	-67	5.3
111	Crop Production	4	-4	0.2	57	-19	0.9
112	Animal Production and Aquaculture	77	-26	3.4	714	-43	14.1
113	Forestry and Logging	0	0	0.0	0	-1	0.0
114	Fishing, Hunting and Trapping	0	0	0.2	2	1	0.7
115	Support Activities for Agriculture and Forestry	3	-2	0.2	32	-5	1.0
21	Mining, Quarrying, and Oil and Gas Extraction	11	2	0.6	242	39	6.1
211	Oil and Gas Extraction	2	0	0.6	53	-14	6.2
212	Mining (except Oil and Gas)	0	0	0.0	0	-2	0.0
213	Support Activities for Mining	8	2	1.0	189	55	10.5
22	Utilities	30	6	1.1	74	1	1.3
23	Construction	325	78	1.1	1,306	335	1.9
236	Construction of Buildings	74	11	1.0	200	-7	1.3
237	Heavy and Civil Engineering Construction	20	-5	0.5	127	-21	1.4
238	Specialty Trade Contractors	232	72	1.2	980	362	2.3
31	Manufacturing	369	8	0.9	567	9	0.6
311	Food Manufacturing	59	7	1.1	77	9	0.6
312	Beverage and Tobacco Product Manufacturing	2	-1	0.2	3	-2	0.1
314	Textile Product Mills	0	0	0.1	1	0	0.1
315	Apparel Manufacturing	17	0	4.8	20	-2	2.5
316	Leather and Allied Product Manufacturing	20	-25	20.3	32	-53	14.6
321	Wood Product Manufacturing	17	14	1.2	51	24	1.6
323	Printing and Related Support Activities	19	3	1.5	27	5	1.0
325	Chemical Manufacturing	21	20	0.7	31	30	0.5
326	Plastics and Rubber Products Manufacturing	37	37	1.5	54	54	1.0
327	Nonmetallic Mineral Product Manufacturing	2	2	0.2	9	5	0.3
331	Primary Metal Manufacturing	67	67	5.8	98	97	3.8
332	Fabricated Metal Product Manufacturing	28	-10	0.6	48	-17	0.5
333	Machinery Manufacturing	6	-5	0.2	31	-10	0.4
334	Computer and Electronic Product Manufacturing	5	4	0.1	5	5	0.1
335	Electrical Equipment, Appliance, and Component Manufacturing	1	0	0.0	1	0	0.0
336	Transportation Equipment Manufacturing	2	1	0.0	4	2	0.0
337	Furniture and Related Product Manufacturing	56	-105	4.4	63	-134	2.2
339	Miscellaneous Manufacturing	9	-2	0.4	11	-4	0.2
42	Wholesale Trade	57	-8	0.3	163	-4	0.4
423	Merchant Wholesalers, Durable Goods	8	4	0.1	53	17	0.2
424	Merchant Wholesalers, Nondurable Goods	5	-2	0.1	44	-9	0.3
425	Wholesale Trade Agents and Brokers	45	-11	2.6	66	-12	1.7

NAICS	Industry Sector	Lockhart			Caldwell County		
		2022 Employment	5 Year Change	LQ	2022 Employment	5 Year Change	LQ
44	Retail Trade	943	398	1.8	1,716	520	1.5
441	Motor Vehicle and Parts Dealers	109	28	1.6	147	23	1.0
444	Building Material and Garden Equipment and Supplies Dealers	161	117	3.4	284	210	2.8
445	Food and Beverage Retailers	230	97	2.2	344	125	1.5
449	Furniture, Home Furnishings, Electronics, and Appliance Retailers	31	4	1.0	37	4	0.5
455	General Merchandise Retailers	151	71	1.4	234	66	1.0
456	Health and Personal Care Retailers	35	7	0.9	70	17	0.8
457	Gasoline Stations and Fuel Dealers	151	55	4.5	452	60	6.2
458	Clothing, Clothing Accessories, Shoe, and Jewelry Retailers	33	14	0.8	67	33	0.8
459	Sporting Goods, Hobby, Musical Instrument, Book, and Miscellaneous Retailers	43	5	0.8	79	-19	0.6
48	Transportation and Warehousing	203	-117	0.8	428	-275	0.8
481	Air Transportation	0	-29	0.0	0	-202	0.0
482	Rail Transportation	4	-1	0.7	14	0	1.3
484	Truck Transportation	14	-10	0.3	79	35	0.7
485	Transit and Ground Passenger Transportation	139	-23	4.6	155	-15	2.3
486	Pipeline Transportation	33	-15	20.3	78	-34	21.6
488	Support Activities for Transportation	8	-34	0.3	34	-45	0.6
491	Postal Service	5	4	0.2	57	3	1.3
492	Couriers and Messengers	1	-3	0.0	10	4	0.1
493	Warehousing and Storage	0	-6	0.0	1	-22	0.0
51	Information	37	-20	0.3	59	-24	0.3
512	Motion Picture and Sound Recording Industries	15	-30	0.9	15	-30	0.4
513	Publishing Industries	3	-5	0.1	5	-8	0.1
516	Broadcasting and Content Providers	0	0	0.0	1	0	0.0
517	Telecommunications	17	16	0.8	19	17	0.4
518	Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services	1	0	0.1	2	0	0.1
519	Web Search Portals, Libraries, Archives, and Other Information Services	0	-2	0.0	17	-3	0.7
52	Finance and Insurance	207	32	1.0	256	36	0.6
522	Credit Intermediation and Related Activities	146	20	1.7	175	25	0.9
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	9	-4	0.3	10	-5	0.1
524	Insurance Carriers and Related Activities	48	13	0.6	68	13	0.4
525	Funds, Trusts, and Other Financial Vehicles	3	3	3.6	3	3	1.9
53	Real Estate and Rental and Leasing	57	22	0.6	102	20	0.5
531	Real Estate	52	25	0.7	88	24	0.5
532	Rental and Leasing Services	5	1	0.3	14	9	0.4
54	Professional, Scientific, and Technical Services	130	17	0.3	238	56	0.3
55	Management of Companies and Enterprises	5	4	0.1	5	3	0.0

NAICS	Industry Sector	Lockhart			Caldwell County		
		2022 Employment	5 Year Change	LQ	2022 Employment	5 Year Change	LQ
56	Administrative and Support and Waste Management and Remediation Services	295	11	0.9	451	-13	0.6
561	Administrative and Support Services	292	9	0.9	434	1	0.6
562	Waste Management and Remediation Services	2	2	0.1	17	-14	0.5
61	Educational Services	690	74	1.7	1,124	116	1.2
62	Health Care and Social Assistance	371	25	0.5	1,668	22	1.0
621	Ambulatory Health Care Services	146	25	0.5	321	67	0.5
622	Hospitals	4	2	0.0	428	-20	0.9
623	Nursing and Residential Care Facilities	145	-7	1.4	693	-37	3.1
624	Social Assistance	76	6	0.5	227	13	0.7
71	Arts, Entertainment, and Recreation	22	4	0.2	104	9	0.5
711	Performing Arts, Spectator Sports, and Related Industries	14	3	0.4	48	10	0.7
712	Museums, Historical Sites, and Similar Institutions	2	0	0.3	33	-4	2.0
713	Amusement, Gambling, and Recreation Industries	6	0	0.1	24	2	0.2
72	Accommodation and Food Services	794	150	1.8	1,177	238	1.2
721	Accommodation	10	-9	0.2	36	-21	0.3
722	Food Services and Drinking Places	783	159	2.1	1,141	259	1.4
81	Other Services (except Public Administration)	165	22	0.7	432	24	0.9
811	Repair and Maintenance	91	12	1.8	176	22	1.6
812	Personal and Laundry Services	42	6	0.6	100	5	0.6
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	30	6	0.3	150	2	0.7
814	Private Households	2	-2	0.3	6	-5	0.4
92	Public Administration	371	45	1.6	510	52	1.0
921	Executive, Legislative, and Other General Government Support	206	40	2.1	284	51	1.3
922	Justice, Public Order, and Safety Activities	104	-5	1.7	143	-9	1.1
923	Administration of Human Resource Programs	28	3	1.0	38	4	0.6
924	Administration of Environmental Quality Programs	19	5	1.7	26	4	1.1
925	Administration of Housing Programs, Urban Planning, and Community Development	4	0	1.3	6	-1	0.8
926	Administration of Economic Programs	10	2	0.5	13	2	0.3

Source: JobsEQ, 4 Quarter Average ending Q3 2022, Garner Economic

Appendix B: Occupational Details

The occupation listing below marks major categories in blue. Specialized Occupations have location quotients greater than 1.2 and are shaded.

SOC	Occupational Group	Lockhart				Caldwell County	
		2022 Employment	2022 Residents	5-Year Change	LQ	2022 Employment	LQ
11-0000	Management	347	358	23	1.0	1,229	1.6
11-1000	Top Executives	108	123	24	0.9	262	1.0
11-2000	Advertising, Marketing, Promotions, Public Relations, and Sales Managers	14	4	2	0.5	30	0.5
11-3000	Operations Specialties Managers	40	13	4	0.5	79	0.5
11-9000	Other Management	185	218	-7	1.4	858	2.8
13-0000	Business and Financial Operations	191	108	48	0.6	388	0.5
13-1000	Business Operations Specialists	119	73	36	0.5	272	0.5
13-2000	Financial Specialists	72	34	12	0.7	116	0.5
15-0000	Computer and Mathematical	75	44	26	0.4	145	0.4
15-1200	Computer	72	43	25	0.4	138	0.4
15-2000	Mathematical Science	3	0	1	0.3	7	0.4
17-0000	Architecture and Engineering	42	7	12	0.5	94	0.5
17-1000	Architects, Surveyors, and Cartographers	6	1	4	0.9	11	0.7
17-2000	Engineers	22	4	4	0.4	55	0.4
17-3000	Drafters, Engineering Technicians, and Mapping Technicians	14	2	4	0.6	29	0.6
19-0000	Life, Physical, and Social Science	25	5	4	0.5	59	0.6
19-1000	Life Scientists	4	1	0	0.3	10	0.4
19-2000	Physical Scientists	3	1	0	0.3	7	0.4
19-3000	Social Scientists and Related Workers	9	2	1	0.9	17	0.8
19-4000	Life, Physical, and Social Science Technicians	5	1	1	0.4	12	0.5
19-5000	Occupational Health and Safety Specialists	4	0	1	0.9	13	1.3
21-0000	Community and Social Service	68	33	6	0.8	232	1.2
21-1000	Counselors, Social Workers, and Other Community and Social Service Specialists	63	31	4	0.8	199	1.2
21-2000	Religious Workers	5	2	2	0.3	33	0.9
23-0000	Legal	29	17	-2	0.7	51	0.5
23-1000	Lawyers, Judges, and Related Workers	21	16	-1	0.7	36	0.6
23-2000	Legal Support Workers	8	2	0	0.6	15	0.4
25-0000	Educational Instruction and Library	462	279	48	1.7	784	1.3
25-1000	Postsecondary Teachers	5	4	0	0.1	10	0.1
25-2000	Preschool, Elementary, Middle, Secondary, and Special Education Teachers	310	184	31	2.3	504	1.7
25-3000	Other Teachers and Instructors	53	29	7	1.4	110	1.3
25-4000	Librarians, Curators, and Archivists	10	1	1	1.3	17	1.0
25-9000	Other Educational Instruction and Library	85	60	9	1.5	143	1.2
27-0000	Arts, Design, Entertainment, Sports, and Media	52	13	9	0.6	124	0.6
27-1000	Art and Design Workers	23	7	7	0.8	44	0.7
27-2000	Entertainers and Performers, Sports and Related Workers	11	3	1	0.4	37	0.7
27-3000	Media and Communication Workers	12	2	-1	0.5	31	0.6
27-4000	Media/Communication Equipment Workers	6	1	2	0.6	12	0.5

SOC	Occupational Group	Lockhart				Caldwell County	
		2022 Employment	2022 Residents	5-Year Change	LQ	2022 Employment	LQ
29-0000	Healthcare Practitioners and Technical	146	106	24	0.5	580	0.9
29-1000	Healthcare Diagnosing or Treating Practitioners	82	68	14	0.4	355	0.8
29-2000	Health Technologists and Technicians	63	37	10	0.7	219	1.0
29-9000	Other Healthcare Practitioners and Technical	1	0	1	0.3	6	0.6
31-0000	Healthcare Support	128	178	6	0.6	469	0.9
31-1100	Home Health/Personal Care Aides; Nursing Assistants, Orderlies, and Psychiatric Aides	91	159	2	0.6	366	1.0
31-2000	Occupational Therapy and Physical Therapist Assistants and Aides	7	0	4	1.1	22	1.6
31-9000	Other Healthcare Support	30	18	0	0.5	81	0.6
33-0000	Protective Service	223	144	23	2.0	310	1.3
33-1000	Supervisors of Protective Service Workers	23	3	3	2.1	32	1.3
33-2000	Firefighting and Prevention Workers	34	17	7	3.3	48	2.1
33-3000	Law Enforcement Workers	108	68	0	2.9	144	1.7
33-9000	Other Protective Service Workers	58	56	13	1.1	85	0.7
35-0000	Food Preparation and Serving Related	751	771	132	1.8	1,150	1.3
35-1000	Supervisors of Food Preparation and Serving Workers	92	89	24	2.2	139	1.5
35-2000	Cooks and Food Preparation Workers	183	220	40	1.5	294	1.1
35-3000	Food and Beverage Serving Workers	423	385	68	2.1	637	1.4
35-9000	Other Food Preparation and Serving Related Workers	52	77	1	1.2	80	0.9
37-0000	Building and Grounds Cleaning and Maintenance	217	294	12	1.3	412	1.1
37-1000	Supervisors of Building and Grounds Cleaning and Maintenance Workers	26	39	2	1.8	48	1.5
37-2000	Building Cleaning and Pest Control Workers	148	196	13	1.3	256	1.0
37-3000	Grounds Maintenance Workers	42	60	-3	1.0	108	1.2
39-0000	Personal Care and Service	89	103	-11	0.7	242	0.9
39-1000	Supervisors of Personal Care and Service Workers	6	1	1	0.8	16	0.9
39-2000	Animal Care and Service Workers	10	7	1	0.8	35	1.2
39-3000	Entertainment Attendants and Related	9	4	-13	0.6	15	0.4
39-4000	Funeral Service Workers	1	0	-1	0.4	2	0.4
39-5000	Personal Appearance Workers	20	47	6	0.7	43	0.7
39-6000	Baggage Porters, Bellhops, and Concierges	0	0	-1	0.3	1	0.3
39-7000	Tour and Travel Guides	1	0	0	0.4	3	1.0
39-9000	Other Personal Care and Service Workers	42	43	-3	0.8	126	1.1
41-0000	Sales and Related	666	602	219	1.4	1,286	1.2
41-1000	Supervisors of Sales Workers	108	84	30	1.7	205	1.5
41-2000	Retail Sales Workers	448	444	172	1.7	872	1.5
41-3000	Sales Representatives, Services	43	32	5	0.6	78	0.5
41-4000	Sales Representatives, Wholesale and Mfg.	26	23	-3	0.5	55	0.5
41-9000	Other Sales and Related Workers	42	20	14	1.2	75	0.9
43-0000	Office and Administrative Support	475	523	20	0.7	1,036	0.7
43-1000	Supervisors of Office and Administrative Support Workers	40	46	3	0.8	81	0.7
43-2000	Communications Equipment Operators	1	0	0	0.3	2	0.5

SOC	Occupational Group	Lockhart				Caldwell County	
		2022 Employment	2022 Residents	5-Year Change	LQ	2022 Employment	LQ
43-3000	Financial Clerks	74	63	-5	0.7	152	0.7
43-4000	Information and Record Clerks	148	140	21	0.8	266	0.6
43-5000	Material Recording, Scheduling, Dispatching, and Distributing Workers	53	78	2	0.7	151	0.9
43-6000	Secretaries and Administrative Assistants	77	87	1	0.7	188	0.8
43-9000	Other Office and Administrative Support Workers	84	110	0	0.7	196	0.8
45-0000	Farming, Fishing, and Forestry	9	26	-4	0.3	115	1.6
45-1000	Supervisors of Farming, Fishing, and Forestry Workers	1	1	0	0.3	4	1.1
45-2000	Agricultural Workers	8	24	-4	0.3	109	1.7
45-3000	Fishing and Hunting Workers	0	1	0	0.2	1	0.7
45-4000	Forest, Conservation, and Logging Workers	0	1	0	0.2	1	0.2
47-0000	Construction and Extraction	237	495	49	1.0	964	1.9
47-1000	Supervisors of Construction and Extraction Workers	25	60	4	1.0	104	1.9
47-2000	Construction Trades Workers	183	353	38	1.0	716	1.8
47-3000	Helpers, Construction Trades	8	15	3	1.1	32	2.0
47-4000	Other Construction and Related Workers	17	31	3	1.1	39	1.2
47-5000	Extraction Workers	5	36	0	0.7	73	4.9
49-0000	Installation, Maintenance, and Repair	210	398	2	1.1	460	1.0
49-1000	Supervisors of Installation, Maintenance, and Repair Workers	19	30	0	1.0	41	1.0
49-2000	Electrical and Electronic Equipment Mechanics, Installers, and Repairers	13	6	3	0.7	28	0.7
49-3000	Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	78	143	-11	1.3	159	1.2
49-9000	Other Installation, Maintenance, and Repair	101	219	10	1.0	233	1.0
51-0000	Production	290	467	0	1.0	500	0.8
51-1000	Supervisors of Production Workers	23	37	3	1.1	41	0.8
51-2000	Assemblers and Fabricators	35	89	-28	0.6	59	0.4
51-3000	Food Processing Workers	31	47	10	1.1	46	0.8
51-4000	Metal Workers and Plastic Workers	54	105	26	1.0	101	0.8
51-5100	Printing Workers	8	18	0	1.1	11	0.7
51-6000	Textile, Apparel, and Furnishings Workers	36	26	-34	2.1	55	1.5
51-7000	Woodworkers	9	16	3	1.1	19	1.0
51-8000	Plant and System Operators	19	9	-2	2.0	44	2.1
51-9000	Other Production	75	120	22	0.9	123	0.7
53-0000	Transportation and Material Moving	437	718	76	1.0	810	0.8
53-1000	Supervisors of Transportation and Material Moving Workers	20	26	0	0.9	37	0.8
53-2000	Air Transportation Workers	1	1	-12	0.1	4	0.2
53-3000	Motor Vehicle Operators	203	283	32	1.3	369	1.1
53-4000	Rail Transportation Workers	4	1	-5	1.1	12	1.5
53-5000	Water Transportation Workers	0	3	0	0.2	2	0.4
53-6000	Other Transportation Workers	12	30	2	1.2	25	1.1
53-7000	Material Moving Workers	196	374	59	0.8	361	0.7

Source: JobsEQ, 4 Quarter Average ending Q3 2022