

Round Rock



DEVELOPING **OUR** FUTURE

2020-2040 POPULATION PROJECTIONS REPORT

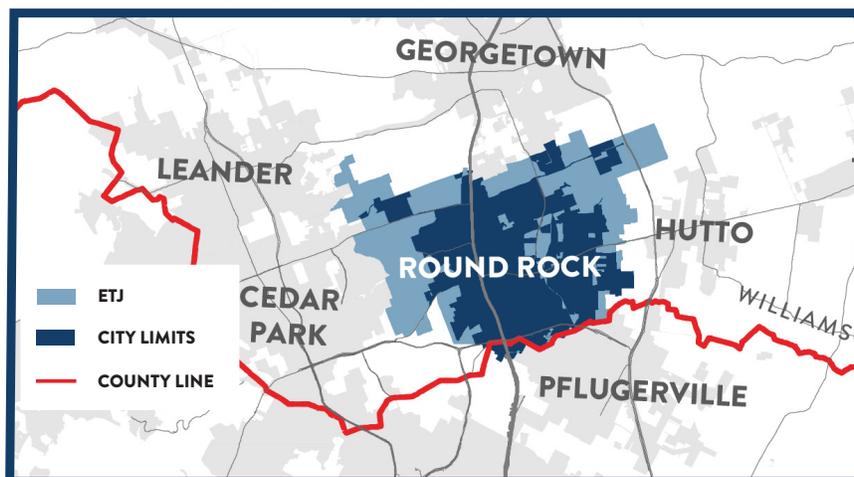


INTRODUCTION

The Planning and Development Services (PDS) department produces annual population estimates for the City of Round Rock and annual population projections for the city and Greater Round Rock. This report contains the latest release of population projections, including the methodology and assumptions made by city staff to produce them. Greater Round Rock includes:

- **Round Rock City Limits:** Round Rock city limits include the incorporated land within the municipal boundary designated with zoning and represented by the City Council.
- **Extra-Territorial Jurisdiction (ETJ):** The ETJ is the unincorporated area that is contiguous to the city limits and that is located within a certain distance of that boundary as specified by the Texas Local Government Code. This also includes Municipal Utility Districts (MUDs). A MUD is a political subdivision of the State of Texas authorized by the Texas Commission of Environmental Quality (TCEQ) to provide water, sewage, drainage, and other utility-related services within the MUD boundaries.

REGIONAL CONTEXT MAP



Using the 2020 Census as the base year, as well as site planning information from Williamson County and the City of Round Rock, city staff have developed population projections for both the city and Greater Round Rock through 2040. Projections were developed utilizing the *Round Rock 2030 Future Land Use Map (FLUM)*, planning information such as zoning and proposed site development projects, and development regulations associated with particular sites.

The 2020-2040 population projections will help the city anticipate, guide, and accommodate growth in the coming two decades by matching the needs of our growing population with the location and capacity of utilities, transportation infrastructure, and other public services.

2020-2040 POPULATION PROJECTIONS FOR THE CITY AND GREATER ROUND ROCK

Using the 2020 Census population as a baseline, PDS has produced 2023-2040 population projections for The City of Round Rock and Greater Round Rock. Annual estimates for 2021 and 2022 have already been released by the City of Round Rock. The data for 2020-2040 is shown in the table below:

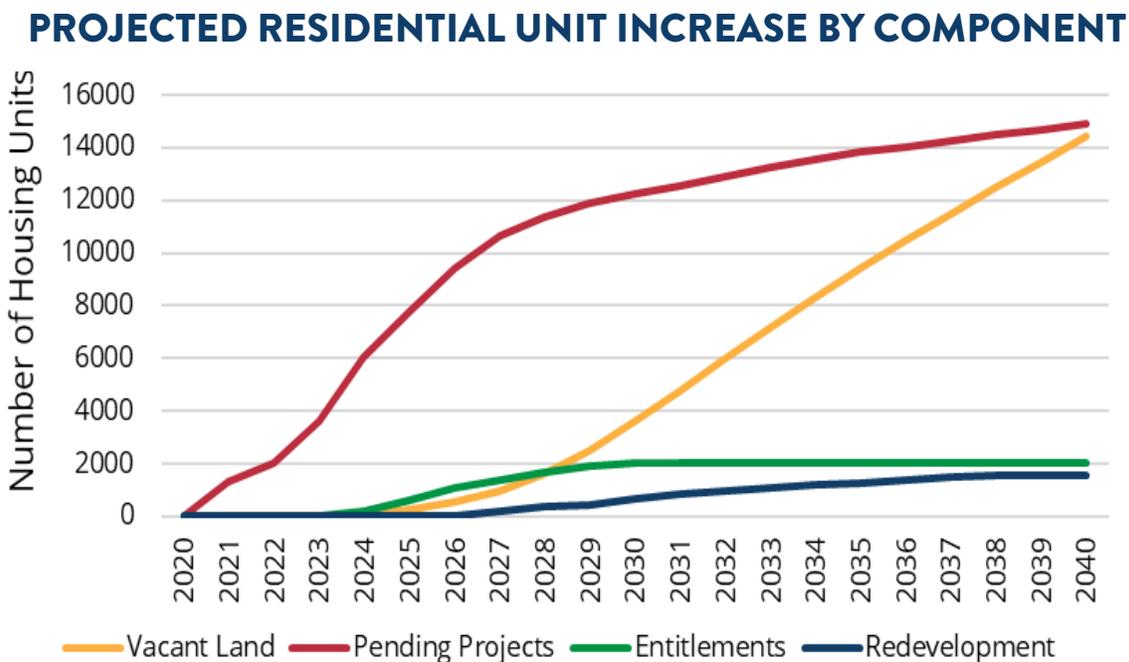
YEAR	CITY LIMITS POPULATION	1-YR CHANGE	GREATER ROUND ROCK POPULATION	1-YR CHANGE
2020	119,468 (Census)	N/A	178,704	N/A
2021	122,827	2.8%	182,336	2.0%
2022	124,614	1.5%	184,993	1.5%
2023	128,292	3.0%	189,286	2.3%
2024	134,540	4.9%	196,035	3.6%
2025	139,834	3.9%	202,208	3.1%
2026	145,208	3.8%	208,843	3.3%
2027	149,621	3.0%	214,486	2.7%
2028	153,530	2.6%	219,624	2.4%
2029	157,298	2.5%	224,320	2.1%
2030	161,136	2.4%	228,933	2.1%
2031	164,982	2.4%	233,479	2.0%
2032	168,791	2.3%	237,885	1.9%
2033	172,520	2.2%	242,143	1.8%
2034	176,163	2.1%	246,273	1.7%
2035	179,507	1.9%	250,040	1.5%
2036	182,560	1.7%	253,433	1.4%
2037	185,513	1.6%	256,700	1.3%
2038	188,427	1.6%	259,901	1.2%
2039	191,306	1.5%	263,017	1.2%
2040	194,151	1.5%	266,051	1.2%

METHODOLOGY

PDS utilized four components of population growth to project the additional number of residential units over time. The four components used to project population are based on predicting changes in the number of housing units in the city, rather than population-based demographic factors. The predictability of the components vary as some projects are currently in development and others are projected based on development trends. The origins of each of these components range from submitted development applications, Commission and Council reviewed proposals, Geographic Information Systems (GIS) city mapping tools, insight from planning and commercial real estate professionals, and the *Round Rock 2030 Comprehensive Plan*.

THE FOUR COMPONENTS

- 1. Pending Projects:** The build-out of projects that are in various stages of the development process, including subdivisions, multifamily complexes, and mixed-use developments.
- 2. Land Entitlements:** The process that landowners have taken to prepare a site to develop in a particular way, through zoning, future land use designation, or a development agreement with the local government.
- 3. Redevelopment:** Construction activity that would add housing units to an existing property suitable for higher density development.
- 4. Vacant Land:** The development of currently vacant or agricultural land into residential units, as identified residential on the *Round Rock 2030 Future Land Use Map (FLUM)*.



The graph shows the cumulative projected residential unit increase within the City of Round Rock. The increase in population in the next 20 years is largely from the development of vacant land throughout Greater Round Rock and projects that are currently in the development process.

2020 CENSUS: THE POPULATION PROJECTION BASELINE

The Census, as required by the U.S. Constitution, is conducted every ten years to count the population of the country and its territories. The Census provides a count of the population on the Census Day, most recently April 1, 2020. Decennial Census data is used to allocate states' congressional seats, make decisions regarding community services, and distribute more than \$600 billion in federal funds to local, state, and tribal governments each year. The 2020 Census population for the City of Round Rock is used as the base population for the city projections.

While the population of Round Rock's ETJ is not reported directly by the Census, city staff utilized 2020 Census data to examine census tract boundaries corresponding to Greater Round Rock. City staff was able to estimate a 2020 population of 59,236 residents in the ETJ. Since the ETJ boundaries do not follow the census tracts exactly, city staff utilized GIS to determine which census tracts align with a given portion of the ETJ to calculate the estimated population of Greater Round Rock.

TOTAL POPULATION 2010 AND 2020 CENSUS

AREA	2010 CENSUS	2020 CENSUS	% INCREASE
City of Round Rock	99,887	119,468	19.6%
Williamson County	422,679	609,017	44.1%
Austin-Round Rock MSA	1,716,289	2,283,371	33.0%
Texas	25,145,561	29,145,505	15.9%

The Austin-Round Rock Metropolitan Statistical Area (MSA) consists of Bastrop, Caldwell, Hays, Travis, and Williamson Counties.

PENDING PROJECTS AND LAND ENTITLEMENTS

Two of the four methodology components are pending projects and entitlements. Pending projects are developments that have been approved for construction or are currently under review for permitting by the city. Most projects will begin construction in the next few years, if they haven't already been partially constructed. Entitlements are the rights to develop a parcel in a particular way, which are secured by zoning, future land use designation, or a development agreement with the city.

PENDING PROJECTS

The city uses the number of residential units to be constructed and the development typology (single-family homes, townhomes, multifamily, etc.) for a given project to project population upon completion. The city assumes that for projects partially completed at the time of this report, a similar pace of construction will occur until completion. Assumptions were made regarding project completion for projects still in the planning phases by examining location, size of project, and typology.

LAND ENTITLEMENTS

Tracts of land in Round Rock may be rezoned, in accordance with the Future Land Use Map (FLUM). In some cases, rezoning allows higher density development. Projects resulting from such land entitlements are assumed to develop based primarily on the timing of the entitlements themselves, with construction expected to be completed up to several years after a zoning change and/or after a subdivision of the land.

HOUSING UNITS IN DEVELOPMENT, 2022-2024

UNIT TYPE	UNIT IN DEVELOPMENT THROUGH 2024
Single-Family	1,372
Single-Family Common Lot	587
Duplex	128
Townhomes	488
Multifamily	1,468
Senior/Assisted Living	586
Total	4,629

The table above shows the projected unit increase from April 2022 through March 2024 by type projected by Planning and Development Services.

REDEVELOPMENT

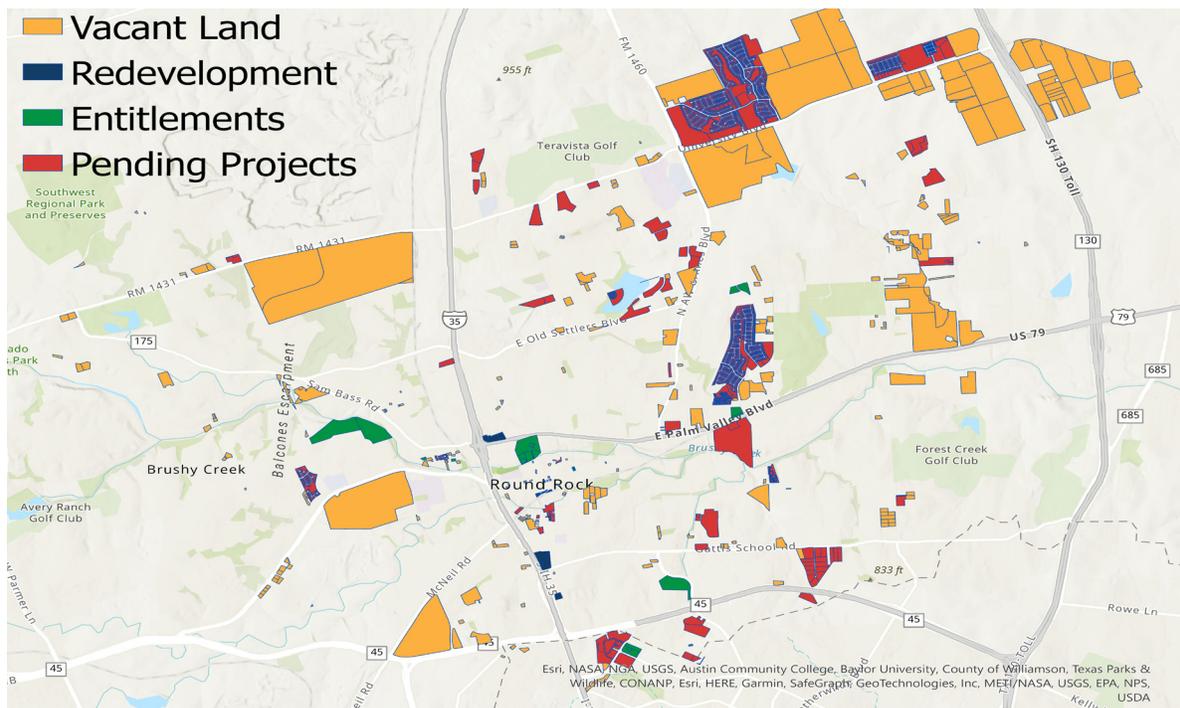
In order to project the population change for redevelopment projects, PDS utilized a list of criteria to find areas of the city that would be suitable for redevelopment in the next 20 years where residential units could be added. These criteria are purely theoretical and express the increased density through the addition of residential units or conversion from commercial to mixed-use.

CRITERIA FOR REDEVELOPMENT

- Large parcels of land, greater than 3 acres
- Current development on site was constructed prior to 1980
- Close proximity to IH-35 or SH-45 corridors for highway access
- No known constraints that could hinder residential development
- Suitable of increased density and/or mixed-use development that would likely mirror the construction duration of other mixed-use properties in Round Rock.

Once the criteria was applied, four commercial centers were identified as having redevelopment potential, as noted on the map below.

2023-2040 LAND DEVELOPMENT BY METHODOLOGY COMPONENT



The land parcels identified for potential future development in the population projections. The 4 components used to project population growth: currently vacant land, pending projects currently in the development process, land use entitlement process, and the potential future site for redevelopment.

VACANT LAND

The development of currently vacant and agricultural land is the largest contributor to the projected population growth. Based on the research conducted for the population projections, planners project that roughly one third of current vacant/agricultural land identified as residential and mixed-use on the Future Land Use Map (FLUM) will develop into projects that contain residential units in the twenty year period. The City expects that the northeast will continue to develop rapidly, especially along the University Boulevard corridor. For the purposes of this report, PDS made the following assumptions for the development of currently vacant land within the city:

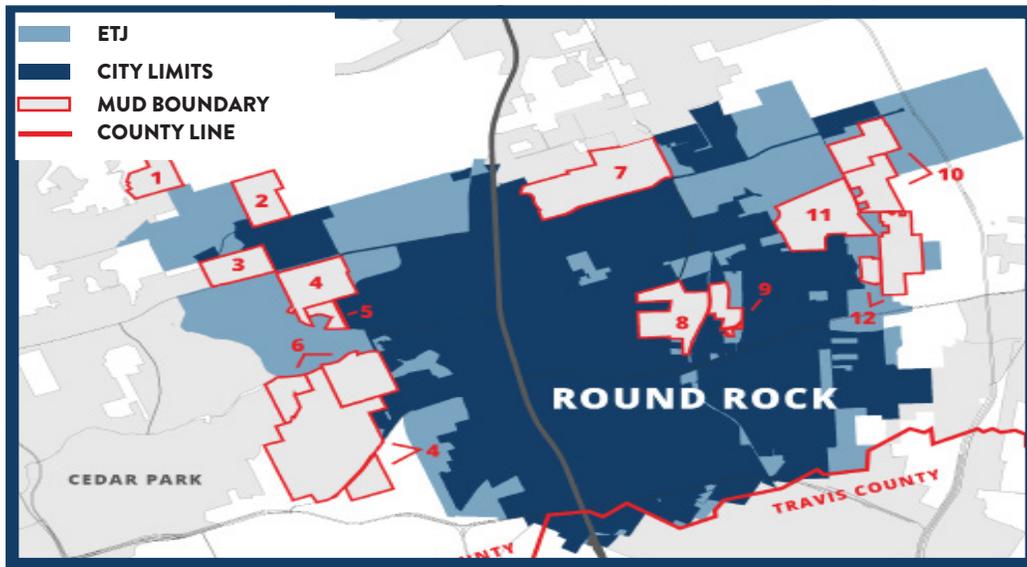
- Projections will reflect the expressed desires of individual landowners regarding the long-term usage of their property, as specified in the city's FLUM. The development of the *Round Rock 2030* FLUM included meetings with large landowners to document their plans for their land over the 10-year planning period.
- The smaller the parcel, the sooner development will take place, as large parcels tend to be in more remote locations.
- Smaller parcels will also tend to have a more condensed development timeline than larger parcels. This reflects both the complexity of developing large tracts of land and the uncertainty regarding when remote parcels will develop.
- Multifamily projects will be given a final approval for residential occupancy on a more condensed timeline than single-family subdivisions, given strong market demand for multifamily residential construction because all multifamily units in a development are typically approved all at once.
- When unit counts are unavailable for a proposed project, the residential density of the project is based on either the density of nearby projects of a similar typology (single-family, townhomes, multifamily, etc.) or, where possible, the maximum number of units specified for the parcel under a development agreement or the parcel's zoning.

GREATER ROUND ROCK ASSUMPTIONS

Greater Round Rock population projections include the total population in the Extra-Territorial Jurisdiction (ETJ) and the city limits. The ETJ consists of areas outside of the city limits, including certain municipal utility districts (MUDs). The population within the Round Rock ETJ is not an exact match to Census tract boundaries, it is more difficult to have a precise baseline population. Additionally, data in the ETJ concerning project development is not as readily available as data in the city limits. Therefore, city staff have utilized the following assumptions to develop population projections for Greater Round Rock through 2040:

- Land north of US-79 and east of IH-35, located within the ETJ, will become part of the city as it develops.
- Properties currently located in the ETJ and in remote locations with poor access to major arterials will have lower residential densities than those inside of city limits.
- Single-family is assumed to be constructed at a maximum pace of 10 units per year in a given project in the ETJ to smooth out the pattern of population growth in the ETJ over the projection period.
- Development of parcels of a given size and suitability for construction may occur sooner in the ETJ than it would in the City of Round Rock. The development of properties located within the ETJ has fewer processes to adhere to and could result in quicker completion.

GREATER ROUND ROCK



ROUND ROCK MUDs

- | | |
|--------------------------------|------------------------------------|
| 1. Parkside at Mayfield Ranch | 7. Teravista |
| 2. Highlands at Mayfield Ranch | 8. Meadows at Chandler Creek |
| 3. Vista Oaks | 9. Homestead at Old Settlers Park* |
| 4. Brushy Creek | 10. Salerno* |
| 5. Walsh Ranch | 11. Paloma Lake |
| 6. Fern Bluff | 12. Siena |

**In-city MUDs are included in the city population*

TRANSLATING HOUSING UNITS INTO POPULATION

The 4 methodology components result in a projection of the number of residential units added to Greater Round Rock in a given year. The residential unit count does not directly translate into population, but rather factors like household size, occupancy rates, and unit typology are considered.

PEOPLE PER HOUSEHOLD

Each project considered in the housing unit projections is identified by type. For example, on average, multifamily units are expected to have fewer people living in them than single-family homes, and units in senior living facilities are expected to have fewer people living in them than traditional multifamily units. Wherever possible, multifamily units are identified by the number of bedrooms they contain, as studio or 1-bedroom apartments likely have fewer people than a 2- or 3-bedroom apartment. Average household size estimates for each of these typologies were assigned based on precedents in previous population projections developed by the City of Round Rock.

RESIDENTIAL TYPE	AVERAGE PERSON PER HOUSEHOLD
Single-Family	2.85
Senior Living	1.80
Multifamily All (Average for project with unknown unit sizes)	1.94
Multifamily 1-bedroom	1.80
Multifamily 2-bedroom	2.00
Multifamily 3-Bedroom	2.85

All unknown or vacant types were assigned 2.61 as the average person per household, which is the 2020 Census average for Round Rock

REGION	OCCUPANCY RATE
City Limits	94.97%
ETJ (including MUDs)	94.46%

OCCUPANCY RATES

Data from the 2020 Census provided occupancy rates for a given housing unit. The city's occupancy rate was used as an indicator of future city occupancy, and the county's occupancy rate was used as an indicator of future ETJ occupancy.

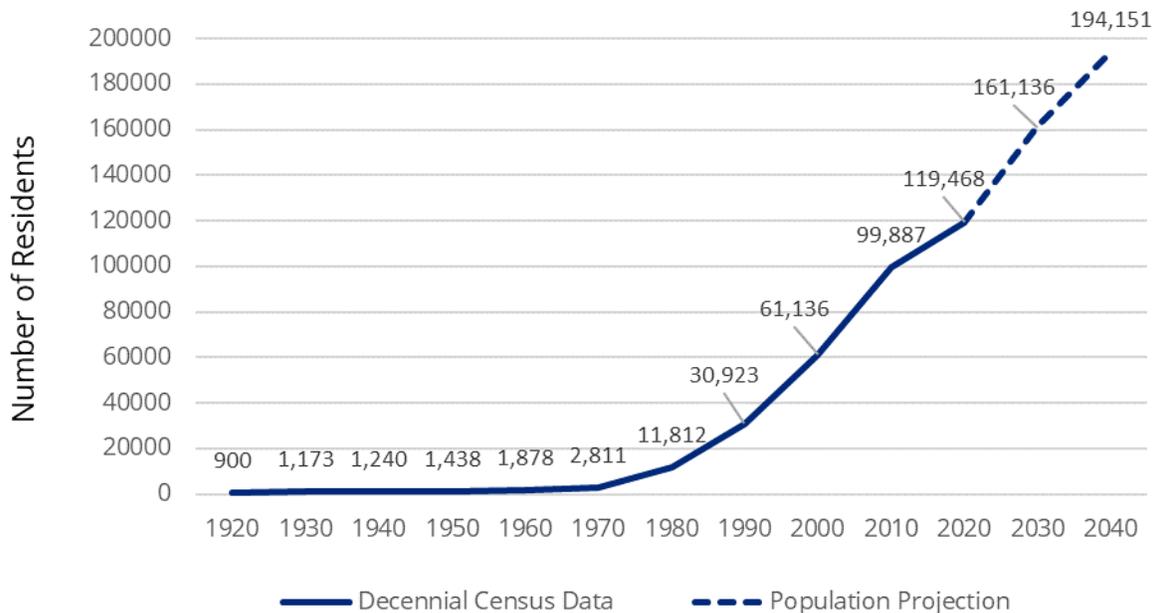
To translate housing units into population, the number of units is multiplied by the occupancy rate and household size for a given project to yield the number of people each project is anticipated to add to Round Rock's population. Projected new residents from completed development projects are added to the base population to arrive at a final population projection for a given year.

CONCLUSION

On August 12, 2021, the U.S. Census Bureau released the 2020 Census, with Round Rock's population counted as 119,468. City staff developed data and projection assumptions in order to release new 20-year projections for Greater Round Rock. City staff projects that by 2040 the population in the city limits will be 194,151 and the Greater Round Rock population will be 266,051. This population growth will result from developments that are currently entitled, under review/under construction, future development of vacant land in compliance with the FLUM, and potential redevelopment resulting in increased density.

The City of Round Rock's official population projections are used to better anticipate the needs of a growing region. Each year, the city releases annual population estimates using updated data, and those estimates will replace the population projections for that given year. The annual city population estimate was 122,827 for 2021 and 124,614 in 2022, both of which were released prior to the publication of this report.

CITY OF ROUND ROCK POPULATION



Please contact Joelle Jordan, Principal Planner, Planning and Development Services for any questions regarding demographics.
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