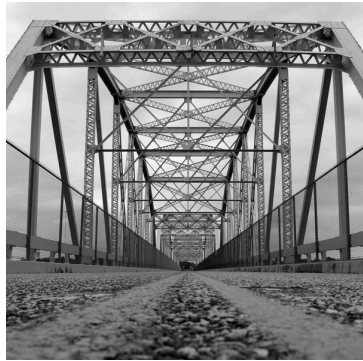


Comprehensive Economic Development Strategy

2025
—
2030



Prepared by The Capital Area
Council of Governments
(CAPCOG)

Acknowledgements

Economic Development Administration (EDA)

The CEDS is funded by the U.S. Economic Development Administration. CAPCOG expresses its appreciation for the EDA's support in advancing regional economic development.

CAPCOG Communities

CAPCOG's communities across the 10-county region played a crucial role in the development of the CEDS. Input was gathered from a diverse range of stakeholders, including county and municipal officials, regional economic development organizations, workforce development professionals, business leaders, and local residents. Their perspectives and expertise helped ensure the strategy reflects the region's economic realities and priorities, fostering a collaborative approach to long-term growth and resilience.

CEDS Committee

The committee is composed of select members from CAPCOG's Economic Development Advisory Committee (EDAC) who play a key role in shaping the CEDS. Their insights help ensure the strategy reflects the region's current economic conditions and guides the development of the strategic direction and action plan. Throughout the planning process, CAPCOG staff worked closely with the committee, incorporating their input and feedback to strengthen the CEDS. We appreciate the dedication and contributions of the following committee members:

- Mike Heath, Transportation
- Commissioner Ann Howard, Travis County
- Mayor Jane Hughson, City of San Marcos
- Paul Fletcher, Workforce Solutions Rural Capital Area
- Adena Lewis, Bastrop County
- Mick Normington, Lee College
- Council Member Frank Ortega, City of Round Rock
- Roland Peña, Opportunity Austin
- Maurice Pitts, Lee County Resident
- Donald Tracy, Austin Community College

CAPCOG Staff

CAPCOG staff supporting the CEDS include:

- Chris Miller, Executive Director
- Charles Simon, Director of Regional Planning & Services
- Kaileen McHugh, Planning and Economic Development Coordinator

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Introduction to the Plan

About the CEDS

CAPCOG is designated by the U.S. Economic Development Administration (EDA) as the Economic Development District. Working on behalf of the district, CAPCOG develops the Comprehensive Economic Development Strategy (CEDS), a five-year plan that assesses economic conditions and establishes economic goals for the region.

How the CEDS is Used

Provides Regional Information and Guidance

The CEDS serves as a resource for local economic development stakeholders at the city, county, and regional levels. It compiles key economic data, trends, and insights to help decision-makers understand regional challenges and opportunities. By offering strategic guidance and a shared perspective, the CEDS supports informed policymaking and planning efforts that align with long-term economic goals.

Fosters Collaboration and Capacity Building

The CEDS establishes a framework for strengthening economic resilience, competitiveness, and quality of life across the Capital Area. It facilitates collaboration among local governments, businesses, workforce organizations, and other stakeholders, encouraging coordinated efforts to address regional economic priorities. By fostering partnerships and aligning resources, the CEDS enhances the region's ability to respond to economic shifts and seize new opportunities.

Attracts and Guides Investment

By providing a clear vision for economic growth and development, the CEDS helps create an environment that attracts public and private investment. It serves as a foundation for capacity-building, enabling the public sector—working alongside businesses, industries, and community leaders—to support sustainable economic prosperity. The strategy demonstrates regional readiness for investment, positioning the Capital Area as a competitive and dynamic place for business expansion and infrastructure development.

The Planning Process

The development of the CEDS followed a structured, collaborative process to ensure it reflects the region's economic priorities and opportunities. CAPCOG began with extensive background research and data collection to establish a strong foundation for the strategy.

To incorporate diverse perspectives, CAPCOG facilitated county workshops and conducted regional stakeholder interviews, engaging local officials, economic and workforce development professionals, business leaders, and residents. The insights gathered from these discussions informed the drafting of the CEDS in partnership with the CEDS Committee, integrating research findings with community input.

Following the drafting phase, the CEDS was released for public comment, providing community members with the opportunity to review and submit feedback. After the public comment period, CAPCOG's Economic Development Advisory Committee (EDAC) conducted a final review before the strategy was presented to CAPCOG's Executive Committee for approval.

Guiding Principles

The following principles are essential to the plan and are incorporated throughout the plan.

Resiliency

Resiliency is a core guiding principle of the CEDS, emphasizing the importance of preparing the region to withstand and recover from economic disruptions, whether from natural disasters, industry downturns, or shifts in national and global markets. By focusing on resiliency, the CEDS aims to strengthen the region's economic foundation, ensuring it remains adaptable and capable of responding to challenges.

Sustainability

With population growth placing increasing demands on water, land, and public services, it's essential to develop strategies that promote long-term sustainability while supporting economic development. The CEDS aims to create a balanced approach that fosters growth without compromising the region's ability to sustain its resources and infrastructure for future generations.

Collaboration

Strong partnerships among local governments, businesses, nonprofit organizations, and community groups are essential for leveraging resources, fostering innovation, and addressing economic challenges. By encouraging broad stakeholder engagement, the CEDS promotes coordinated strategies that enhance regional cohesion and maximize investment impact.

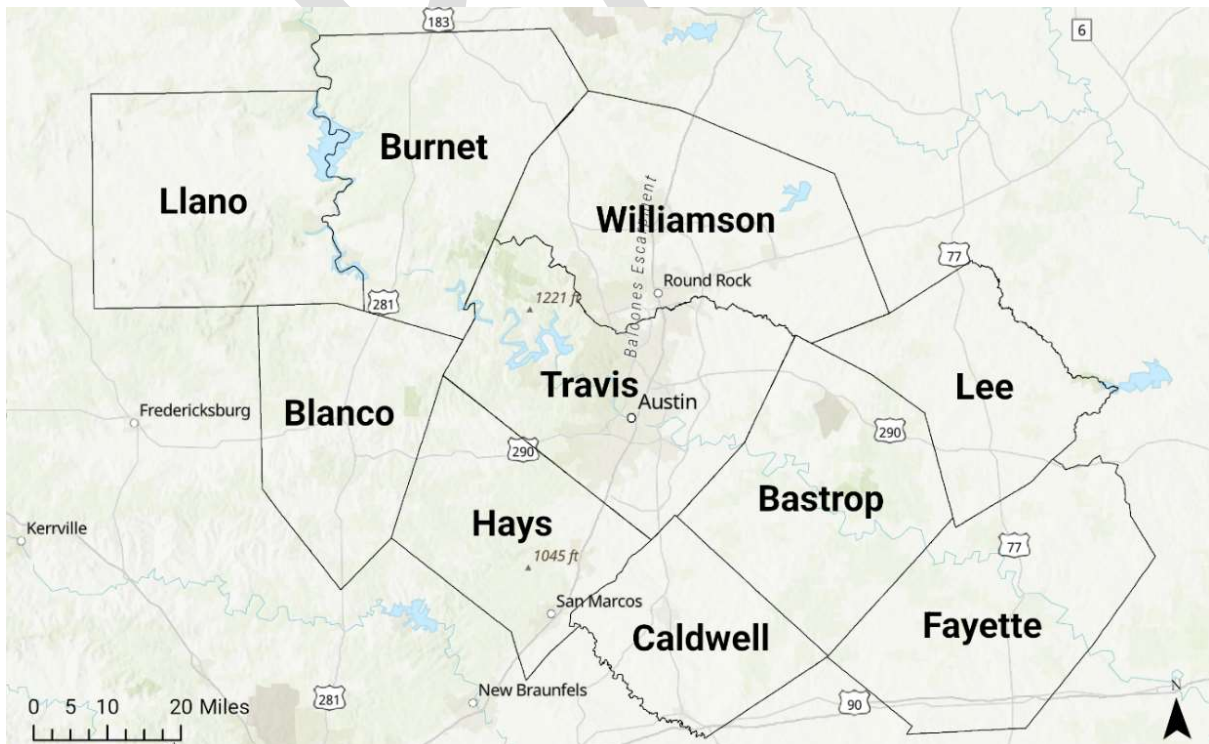
Background Summary

The CAPCOG region consists of 10 urban, suburban and rural counties in Central Texas: Bastrop, Blanco, Burnet, Caldwell, Fayette, Hays, Lee, Llano, Travis, and Williamson.

The region has experienced significant population and job growth in recent years, with the most rapid expansion occurring in the urban and suburban core. However, economic activity and population gains have extended into more rural areas as well—particularly accelerated by the rise of remote work during the pandemic.

This growth has contributed positively to the region's overall economic performance, including the emergence of new sectors that offer higher-paying job opportunities. Despite these advancements, a substantial portion of the region's economy continues to rely on traditional industries that often provide lower-wage employment, leading to persistent disparities in income and opportunity across communities.

Rapid growth has also placed increasing pressure on existing infrastructure, particularly in areas such as housing, transportation, and utilities. Nonetheless, the region maintains a strong appeal due to its high quality of life. Residents value the region's abundant outdoor recreation options, cultural amenities, and strategic location within the state.



Population and Socioeconomic Overview

Who lives here? How is overall economic wellbeing?

Population

CAPCOG's counties and cities are continuously ranked in the Census Bureau's top growing places lists: Caldwell County was #9 for top 10 counties by percent growth from 2023-2024, and Georgetown and Kyle were ranked in the Top 15 Fastest-Growing Cities list from 2022-2023 (with Leander making the cut as well for 2021-2022). The Austin metro has made the top of the lists for fastest growing metros for several years and continues to have significant population growth.

In the past 10 years the region has seen an increase of 608,179 residents. This is a percentage increase of more than 30%, with the growth rate nearly doubling that of the state. See Table 1.

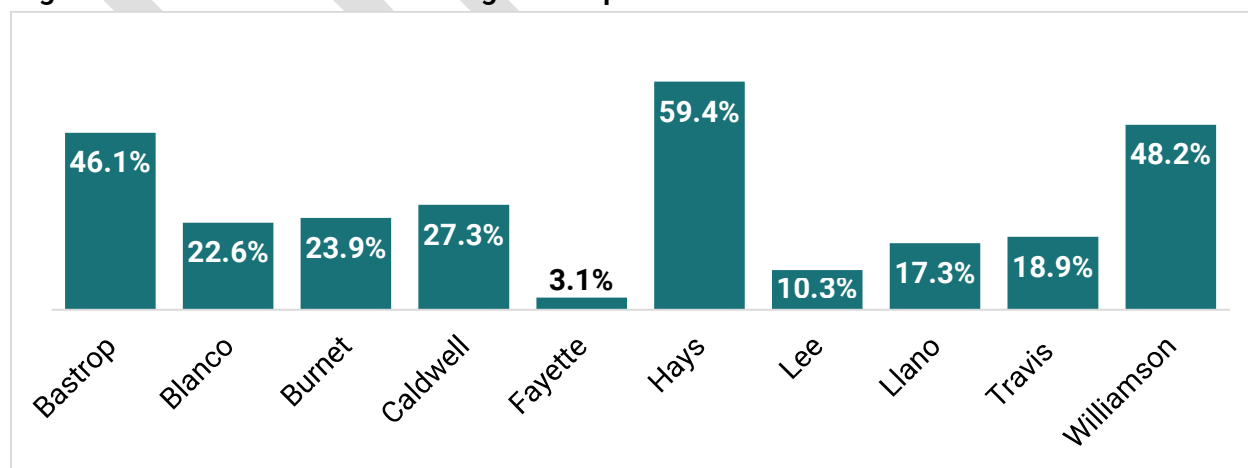
Table 1: 10-Year Population Change for Region, State, and Nation

PLACE	2013	2023	NUMBER CHANGE	PERCENT CHANGE
CAPCOG REGION	1,998,724	2,606,903	+608,179	+30.4%
TEXAS	2,6479,646	30,727,890	+4,248,244	+16.0%
U.S.	316,059,947	334,914,895	+18,854,948	+6.0%

Source: U.S. Census Bureau, Population Estimates Program

The population has increased region-wide, with some counties experiencing much more growth than others. CAPCOG's suburban counties (Bastrop, Hays, and Williamson) experienced the highest rates of growth in the past 10 years, at 46.1%, 59.4%, and 48.2% respectively. See Figure 1.

Figure 1: 10-Year Percent Change in Population for CAPCOG Counties



Source: U.S. Census Bureau, Population Estimates Program

The majority of growth into these 3 suburban counties comes from people migrating from the urban core in Travis County. The majority of growth into the 10-county region comes from Harris County (TX), Bexar County (TX), Los Angeles County (CA), Dallas County (TX), and Bell County (TX). See Appendices for detailed migration data.

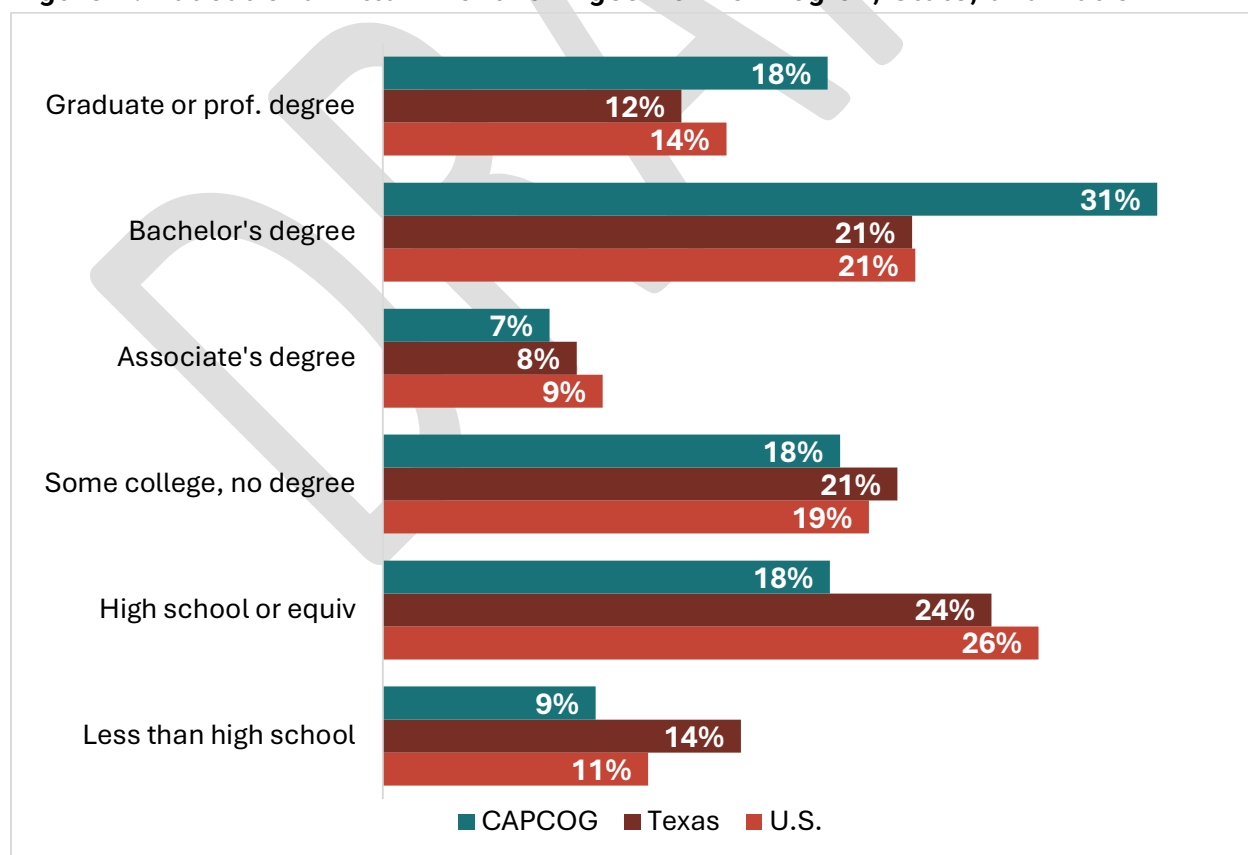
Race & Ethnicity

Throughout the Capital Area, 50.9% of the population identifies as White alone, non-Hispanic or Latino. 31.5% of the population identifies as Hispanic or Latino (of any race), 6.7% identify as Black or African American alone, 6.5% identify as Asian alone, and 4.4% as American Indian and Alaska Native alone, Native Hawaiian and Other Pacific Islander alone, some other race alone, or two or more races. The region has an increasingly diverse population compared to the United States overall and is on par with Texas population statistics. See Appendices for detailed race and ethnicity data.

Educational Attainment

Nearly half (49%) of the population in the CAPCOG region have a bachelor's degree or higher. This is higher than the state (33%) and the nation (35%), indicating a well-educated workforce. See Figure 2.

Figure 2: Educational Attainment for Ages 25+ for Region, State, and Nation

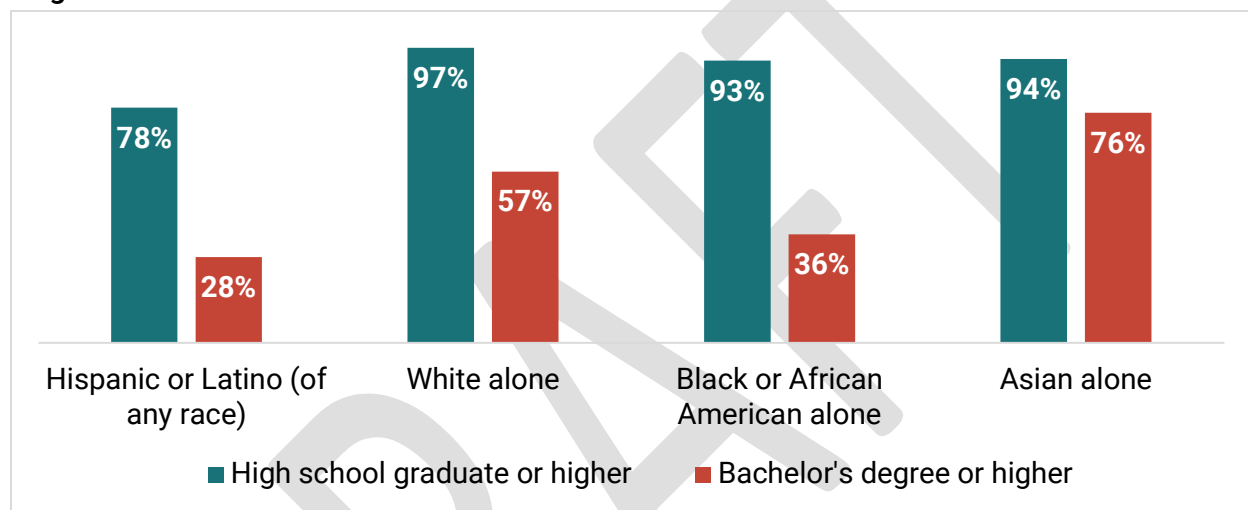


Source: U.S. Census Bureau, 2023 ACS 5-Year Estimates

Although the region shows robust educational attainment as a whole, it varies by county. Travis County has the highest rate of those with bachelor's degrees or higher at 58.7%, while Caldwell County has a rate of only 16.5%, and Lee County with a rate of 18.7%.

Educational attainment by race and ethnicity varies as well. Those identifying as Hispanic or Latino have much lower rates of educational attainment than other populations: only 78% have a high school diploma or greater and only 28% have a bachelor's degree or higher. Populations identifying as White alone or Asian alone have higher rates of educational attainment, as shown in Figure 3.

Figure 3: Educational Attainment for Ages 25+ by Race & Ethnicity for CAPCOG Region



Source: U.S. Census Bureau, 2023 ACS 5-Year Estimates

Income

The median household income varies across counties: Llano County has the lowest estimates at \$65,636, followed by Lee County at \$66,000, and Caldwell County at \$68,503. Counties with the highest estimated median household income include Williamson at \$108,309 and Travis at \$97,169. Detailed income tables, including per capita income, can be found in the Appendices.

Employment and Industry Trends

How many people work here? What industries drive the regional economy?

Employment

Similarly to population, the number of jobs in the region has grown significantly in the past 10 years. The region has experienced an estimated 444,001 increase, or 44.4% increase in the number of jobs. The state has had a 23.1% increase, while the nation overall has had a 13.2% increase. See Table 2.

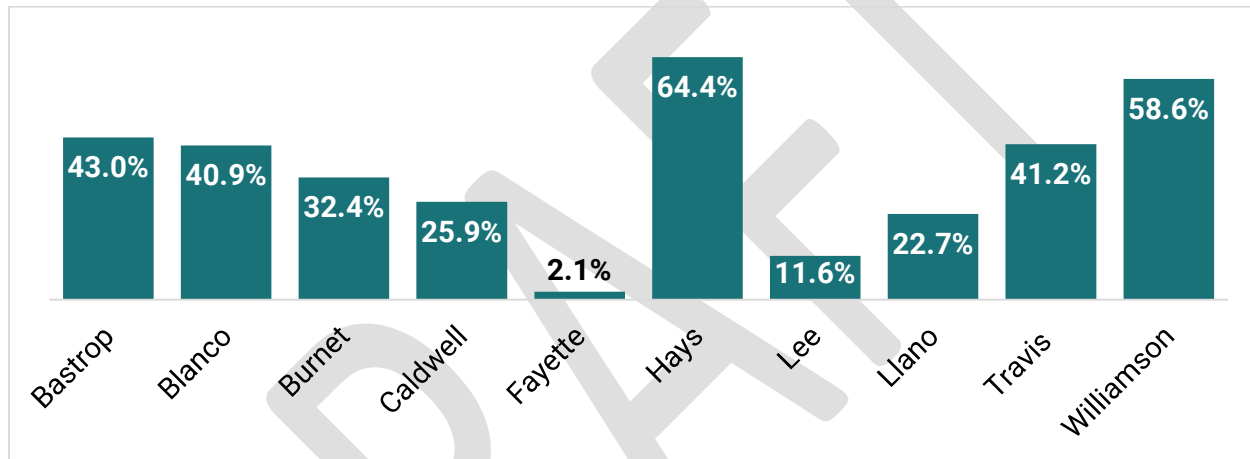
Table 2: 10-Year Change in Number of Jobs for Region, State, and Nation

PLACE	2013	2023	NUMBER CHANGE	PERCENT CHANGE
CAPCOG REGION	998,931	1,442,932	+444,001	+44.4%
TEXAS	12,628,316	15,545,050	+2,916,734	+23.1%
U.S.	152,245,392	172,376,764	+20,131,372	+13.2%

Source: Lightcast

Job growth has varied by county. Hays County has had a 64.4% increase in number of jobs, followed by Williamson County at 58.6%, and Bastrop at 43%. Counties with the least amount of job growth include Fayette at 2.1% and Lee at 11.6%. See Figure 4.

Figure 4: 10-Year Percent Change in Number of Jobs for CAPCOG Counties

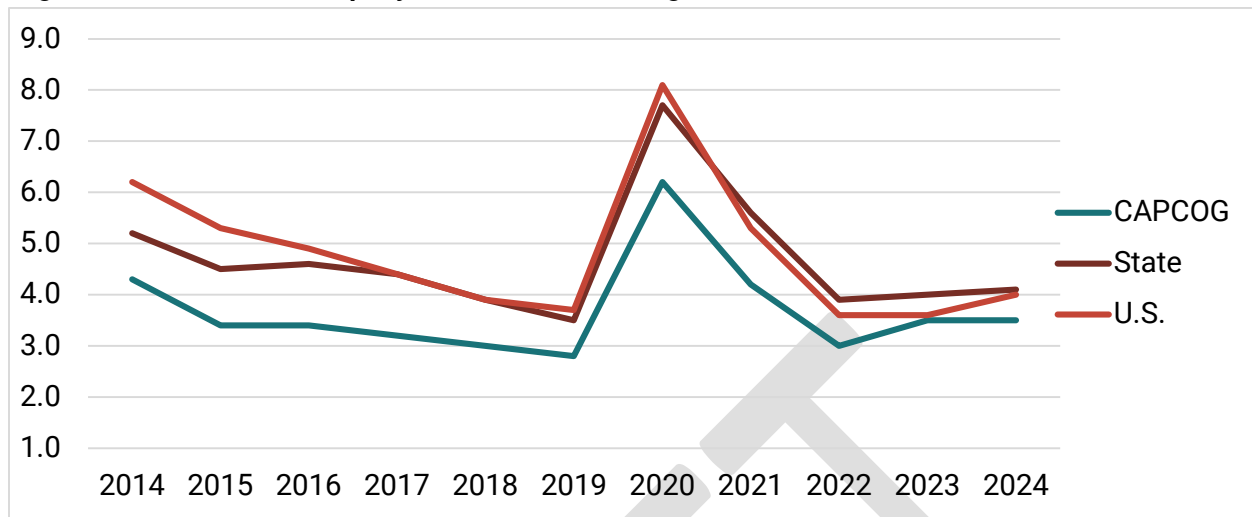


Source: Lightcast

Unemployment

Annual unemployment rates across the region are consistently below that of the state and nation. All geographies experienced an increase in unemployment during the 2020 pandemic, and over the past few years unemployment rates have returned to pre-pandemic rates.

Figure 5: Annual Unemployment Rate for Region, State, and Nation, 2014-2024

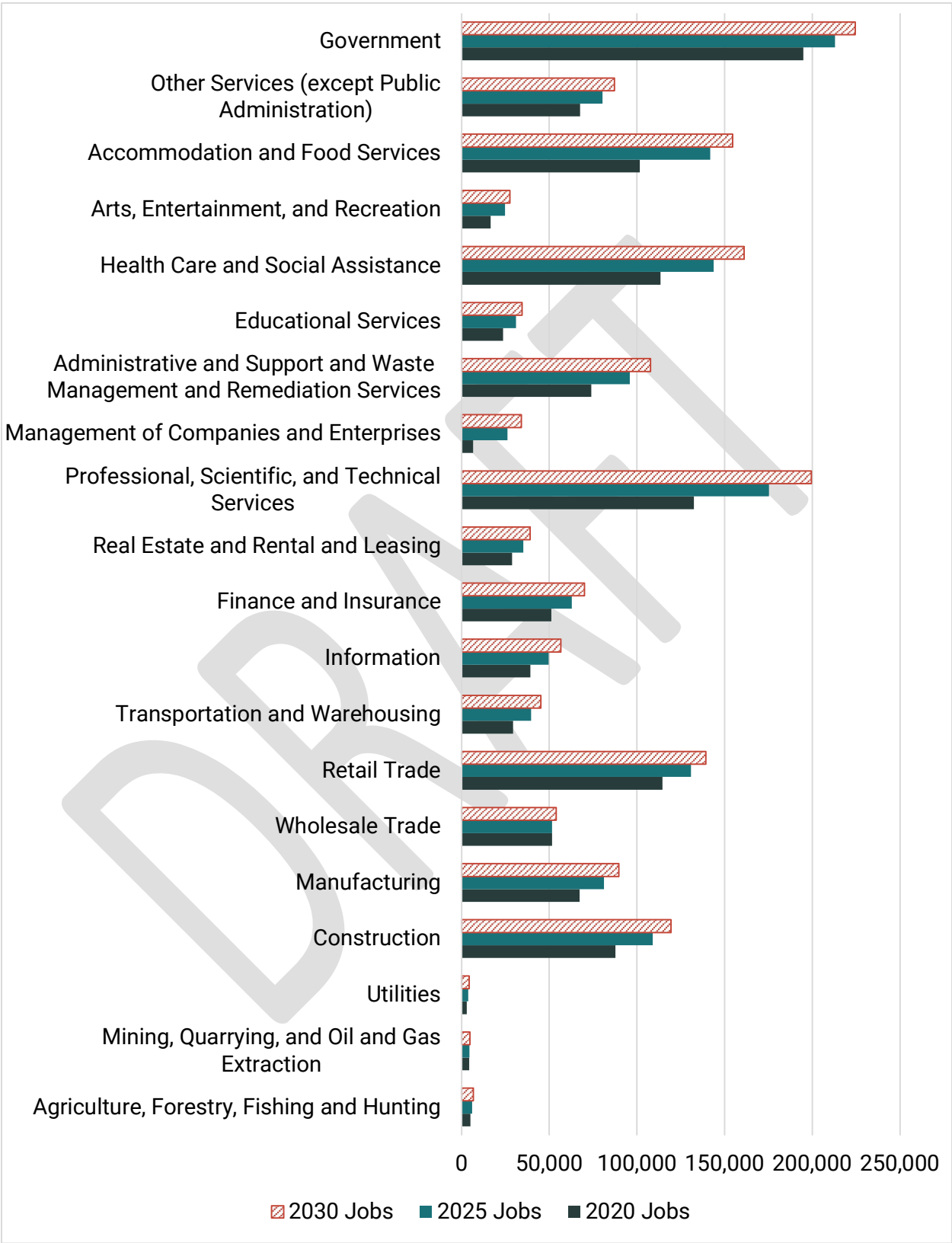


Source: LAUS

Industries

Current top industries by number of jobs in the region include 1) Government, 2) Professional, Scientific, and Technical Services, and 3) Health Care and Social Assistance. These are expected to remain as the top 3 industries into 2030. In 2020, Retail Trade was leading Health Care and Social Assistance as the 3rd top industry. See Figure 6.

Figure 6: Number of Jobs by Industry for 2020, 2025, 2030 for CAPCOG Region



Source: Lightcast

Industries with the greatest job growth between 2020 and 2025 include 1) Management of Companies and Enterprises at 296%, 2) Arts, Entertainment, and Recreation at 49%, and 3) Accommodation and Food Services at 39%. The growth in the latter two could be contributed to job loss and then growth following the 2020 pandemic.

Industries with the most expected job growth between 2025 and 2030 includes 1) Management of Companies and Enterprises at 30%, 2) Information at 14%, and 3) Transportation and Warehousing at 14%.

There are certain industries with high employment concentration in the region, meaning there are a large number of jobs here compared to the rest of the country.

This includes 1) the Information industry with a location quotient (LQ) of 1.81, 2) the Professional, Scientific, and Technical Services industry with a LQ of 1.64, and 3) the Real Estate and Rental and Leasing industry with an LQ of 1.33. Several additional industries have an LQ above 1, indicating specialization of these industries in the region. See the Appendices for detailed industry tables.

Location Quotient

Location quotient (LQ) is a way to measure how concentrated a type of job is in a region compared to the national average. If the LQ is greater than 1, that job is more common in the region than it is nationally. If it's less than 1, the job is less common in the region. This helps identify what industries a region specializes in.

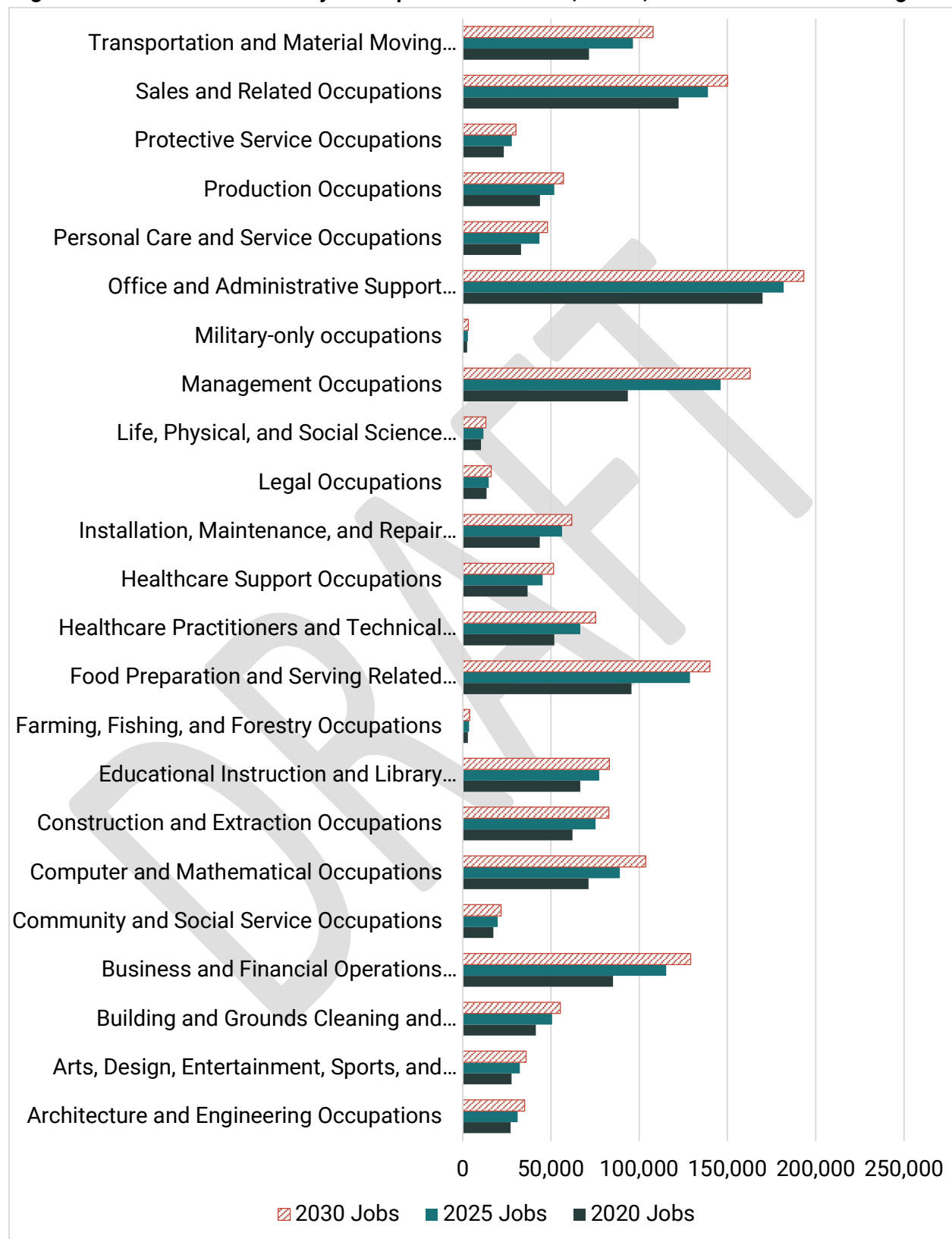
Occupations

Current top occupations by number of jobs are 1) Office and Administrative Support Occupations, 2) Management Occupations, and 3) Sales and Related Occupations. It's predicted these will remain the top occupations in 2030.

It's important to note that only one of these occupations, Management, has high average annual earnings at an estimated \$133,778 per job. Office and Administrative Support Occupations have average annual earnings of \$48,201 per job, and Sales and Related Occupations have average annual earnings of \$60,165 per job.

In 2020, Office and Administrative Support Occupations was still the top occupation, followed by Sales and Related Occupations, and Food Preparation and Serving Related Occupations. Food Preparation and Serving Related Occupations tend to have very low annual earnings and remain a top occupation by number of jobs in the region, although it no longer makes the top 3 list. See Figure 7.

Figure 7: Number of Jobs by Occupation for 2020, 2025, 2030 for CAPCOG Region



Source: Lightcast

Occupations with the greatest job growth between 2020 and 2025 included 1) Management Occupations at 56%, 2) Business and Financial Operations Occupations at 35%, and 3) Transportation and Material Moving Occupations at 35%.

Occupations expected to have the most job growth between 2025 and 2030 include 1) Computer and Mathematical Occupations at 17%, 2) Healthcare Support Occupations at 13%, and 3) Healthcare Practitioners and Technical Occupations at 13%.

Occupation specializations in the region include Computer and Mathematical Occupations with an LQ of 1.83, 2) Management Occupations with a LQ of 1.31, and 3) Architecture and Engineering Occupations with a LQ of 1.3. See Appendices for detailed occupation tables.

Housing and Infrastructure Conditions

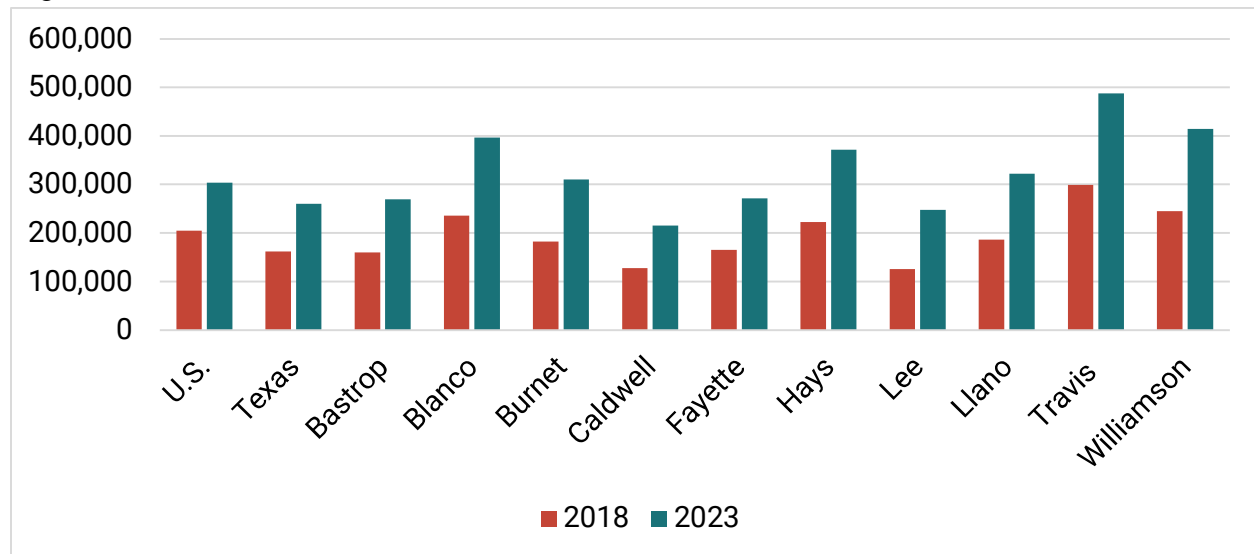
How is the overall quality of life in the region? How does existing infrastructure impact economic opportunities?

Housing

Housing affordability continues to be a major challenge for the region. Prices for both homes and rentals increased significantly during the 2020 pandemic. While prices have been coming back down, they still stand above that of pre-pandemic levels. Rising housing costs can contribute to labor market challenges by making it difficult for workers to live near their place of employment, and can ultimately reduce a region's competitiveness in attracting and retaining businesses and talent.

When looking at median home values between 2018 and 2023, the nation had an increase of 48% and the state an increase of 61%. Each CAPCOG county experienced increased home values greater than that of the state. Counties with the greatest jumps in median home value include Lee County at 97%, Llano at 73%, and Burnet at 70%. See Figure 8.

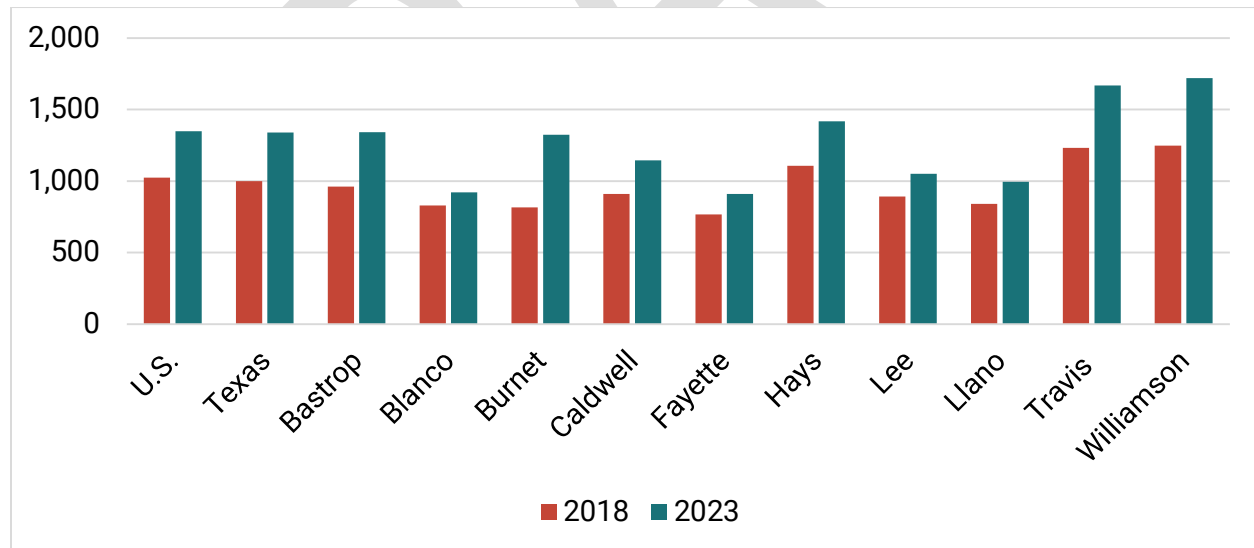
Figure 8: Median Home Values 2018-2023



Source: U.S. Census Bureau, 2018 and 2023 ACS 5-Year Estimates

Median gross rents have increased across the nation, state, and region as well. The U.S. has had a 32% increase in rents and the state has had a 34% increase. Several CAPCOG counties had increases greater than this: Burnet County experienced a 62% increase, Bastrop a 40% increase, and Williamson County a 38% increase. See Figure 9.

Figure 9: Median Gross Rent, 2018-2023



Source: U.S. Census Bureau, 2018 and 2023 ACS 5-Year Estimates

Transportation networks

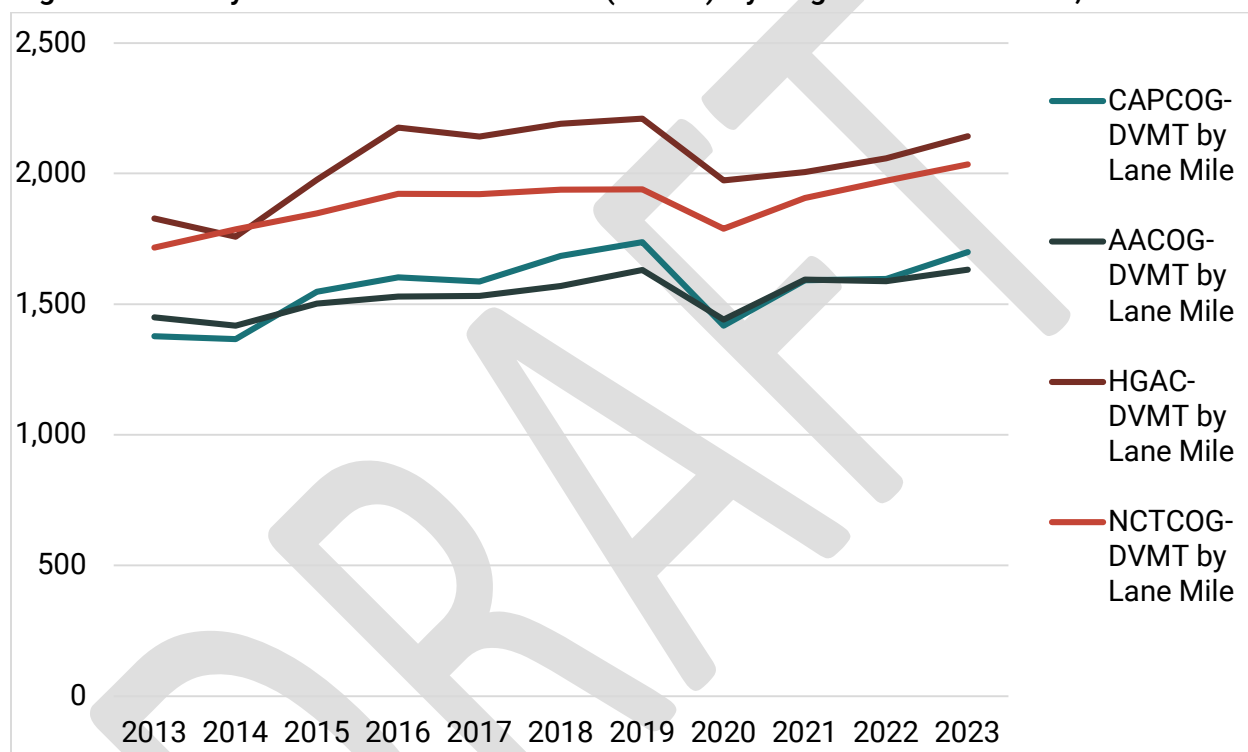
As the region's population grows, additional strain is placed on road infrastructure. In the past 10 years the region's daily vehicle miles travelled (DVMT) increased from 49,529,747 to 66,054,572, a 33% increase. Peer regions, such as AACOG had an 18% increase, NCTCOG had a

28% increase, and HGAC had a 29% increase - each of these lower than CAPCOG's increase. The state overall had a 23% increase.

During the pandemic, daily vehicle miles travelled (DVMT) decreased for CAPCOG, peer regions, and the state. Since 2020, DVMT has been increasing to pre-pandemic levels.

When analyzing DVMT by the amount of roads that exist (lane miles), the region is on par with AACOG. CAPCOG's truck traffic did not experience a decline during the pandemic, unlike in peer regions. See Figure 10 and Appendices.

Figure 10: Daily Vehicle Miles Traveled (DVMT) by Regional Lane Miles, 2013-2023



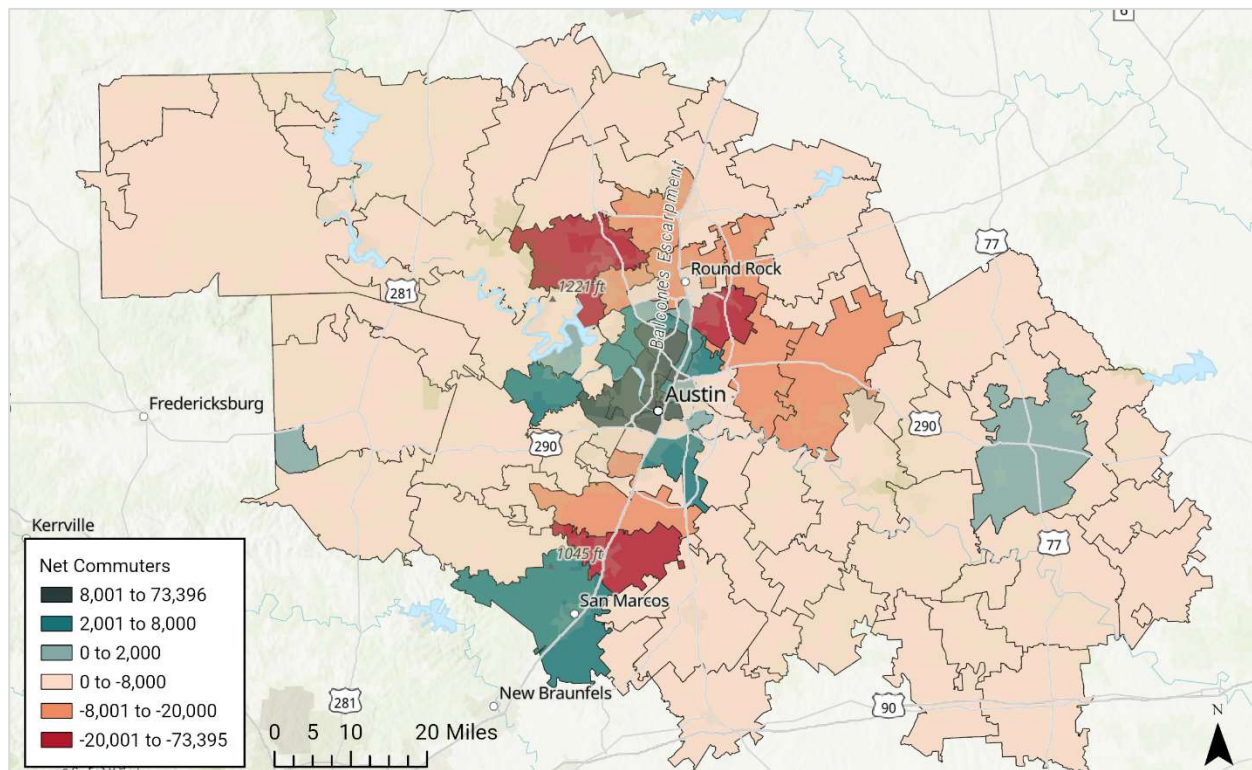
Source: TxDOT

Commuting

The majority of employment is in the urban core of the region, with people commuting in from the surrounding suburban areas. The zip code areas of downtown Austin have 8,000+ more workers than residents, indicating a large number of workers commute into the area. Several zip codes adjacent to downtown Austin import between 2,000 and 8,000 workers. Zip codes for Kyle, Leander, Pflugerville show 20,000 or more residents than workers, indicating a large number of residents leaving these areas for work, most likely heading into the urban core. Other areas of note include Giddings, importing about 550 workers, and San Marcos, importing a little over 2,000 workers.

Having this mismatch between places of residence and places of work increases strains on local road infrastructure, contributes to traffic congestion, and leads to lower air quality.

Figure 11: Place of Work vs Place of Residence for CAPCOG Zip Codes

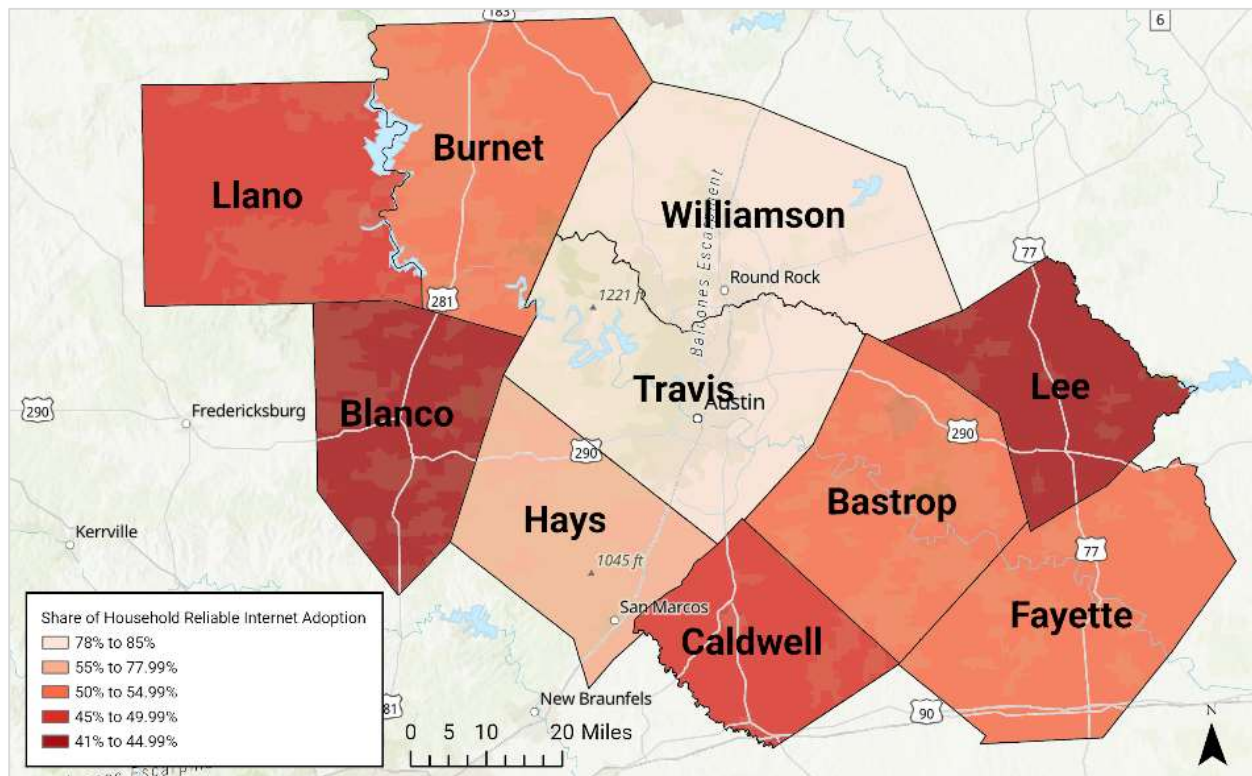


Source: Lightcast

Broadband

About 80% of CAPCOG households subscribe to high-speed, reliable internet at home. Much like the nation and state, rural and unincorporated areas of the region have limited access to reliable and affordable home internet. In Blanco County, only 42% of households subscribe to high-speed reliable internet at home. In Lee County only 55% of households subscribe to high-speed reliable internet at home. See Figure 12.

Figure 12: Share of Households with Reliable Internet Access by County



Source: U.S. Census Bureau, 2023 ACS 5-Year Estimates

SWOT Analysis

The SWOT analysis was developed by combining background research and data analysis with input gathered from county workshop meetings and guidance from the CEDS subcommittee. Information from these sources was summarized to identify key internal strengths and weaknesses, as well as external opportunities and threats. This approach ensured that the analysis reflects both quantitative insights and the perspectives of local stakeholders.



Strengths

- Strategic Location
- Population and Job Growth
- Educated and Growing Workforce
- Vibrant Quality of Life and Tourism Appeal
- Established and Emerging Industry Clusters
- Business Climate and Culture



Opportunities

- Enhancing the Middle-Skill Workforce for Industry Clusters
- Additional Support for Rural Workforce Development
- Connecting Workforce Housing with Employment Hubs
- Enhance Tourism through Regional Coordination
- Expand Broadband for Rural Economic Growth
- Strengthen Regional Collaboration



Weaknesses

- Labor Market Constraints
- Urban vs Rural Divide
- Transportation Infrastructure Strain
- Housing Affordability and Availability
- Water Infrastructure Challenges



Threats

- Resource Constraints
- Infrastructure Gaps and Traffic Congestion
- Dependence on Dominant Sectors
- Broadband Access Gaps
- Lack of Coordinated Planning

Strengths

Strategic Location

CAPCOG's location in the Texas Triangle along the I-35 corridor gives the region direct access to major markets, supply chains, and a large labor pool enhancing both business opportunities and regional connectivity.

Population and Job Growth

Sustained growth in both population and employment reflects a dynamic economy and creates momentum for continued investment and workforce expansion.

Educated and Growing Workforce

A young and educated labor pool—supported by universities, training programs, and upskilling opportunities—positions the region to meet the evolving needs of employers across diverse industries.

Vibrant Quality of Life and Tourism Appeal

High quality of life, abundant outdoor recreation, cultural events, and a strong tourism industry make the region attractive to residents, visitors, and prospective businesses alike.

Established and Emerging Industry Clusters

With strengths in government, technology, manufacturing, and advanced industries, as well as presence of mega-employers, the region supports both economic stability and innovation.

Business Climate and Culture

A favorable business environment, combined with a reputation for entrepreneurship, continues to attract new companies and support long-term economic resilience.

Opportunities

Enhancing the Middle-Skill Workforce for Industry Clusters

By building on existing workforce development efforts, targeted training programs can equip workers with the specific skills needed to support high-demand sectors, promoting regional self-sufficiency.

Additional Support for Rural Workforce Development

Bridging the skill gap in rural communities and ensuring that these regions have the talent to support emerging industries and small business growth, would help prevent workforce shortages and enable economic growth in all areas of the region.

Connecting Workforce Housing with Employment Hubs

Promoting workforce housing near key employment hubs can help ensure that workers have access to housing close to their places of employment, reduce commute times, enhance quality of life, and attract additional talent.

Enhance Tourism through Regional Coordination

By aligning tourism efforts across surrounding counties and promoting regional assets collectively, the area can maximize the economic potential of tourism.

Expand Broadband for Rural Economic Growth

Investing in reliable broadband infrastructure in underserved areas can make them attractive hubs for start-ups and small businesses, diversifying the regional economy.

Strengthen Regional Collaboration

The Capital Area has some stakeholder collaboration, but further enhancing information sharing and harmonizing development initiatives, can improve overall regional economic development.

Weaknesses

Labor Market Constraints

While low unemployment signals a strong economy, it creates challenges for employers struggling to find qualified workers. Rural areas face limited labor pools, while urban areas with large employers must adapt quickly to changing workforce demands and skill requirements.

Urban vs Rural Divide

Rural communities face limited access to education, employment, and infrastructure, while urban areas benefit from greater resources. This imbalance hinders equitable development and regional cohesion.

Transportation Infrastructure Strain

The region faces ongoing transportation challenges, including congested roadways, limited public transit, and inadequate rural transportation options. These issues hinder mobility, slow the movement of goods, and negatively impact both quality of life and economic efficiency.

Housing Affordability and Availability

Many areas within the region struggle with the availability and affordability of housing. As housing prices rise, many low- and middle-income workers face difficulty in finding living options near employment hubs, exacerbating the negative effects of sprawl.

Water Infrastructure Challenges

The region's water infrastructure is aging, with many treatment facilities nearing capacity and struggling to keep pace with rapid population growth. In some areas, limited system investment and coordination have created gaps in reliable access to water. Without upgrades, this internal limitation may hinder growth and reduce service quality.

Threats

Resource Constraints

Population growth and increased development are placing pressure on the region's limited water resources and available land. If not addressed, these resource constraints could jeopardize future development and quality of life.

Infrastructure Gaps and Traffic Congestion

As the region grows, increased north-south highway congestion, lack of connectivity between roads and rail, and limited capacity at the airport pose significant barriers to business operations and overall quality of life.

Dependence on Dominant Sectors

The region's reliance on specific sectors creates economic vulnerability. A downturn in these industries could severely impact the local economy. Economic diversification is needed to mitigate the risk of being overly dependent on a few key sectors.

Broadband Access Gaps

Without improved connectivity in rural and outlying areas, these areas may struggle to attract entrepreneurs or retain new business ventures, limiting regional economic diversification and growth.

Lack of Coordinated Planning

As growth accelerates across the region, inconsistent planning and limited collaboration among jurisdictions risk creating fragmented development and missed opportunities. Without a shared vision and proactive coordination on issues like infrastructure, housing, and workforce, the region may struggle to manage growth equitably, maintain quality of life, and compete for funding or investment. Over time, this lack of alignment could undermine long-term resilience.

Strategic Direction & Action Plan

This section outlines four overarching goals, each paired with a corresponding vision statement to guide strategic direction. For each goal, the plan identifies specific objectives, actionable steps, key collaborators, and potential funding sources. Together, these components provide a comprehensive framework to support implementation and track progress over time.



Foster a Dynamic Business Ecosystem

A region where businesses of all sizes thrive through innovation, collaboration, and opportunity—creating a resilient and diverse economy.



Advance Workforce Development

A region where residents can access meaningful career pathways and lifelong learning, and where employers find the skilled, adaptable talent they need to grow and compete.



Improve Infrastructure & Connectivity

A region powered by modern, reliable infrastructure that connects communities, supports economic growth, and prepares us for the future.



Enhance Quality of Place & Livability

A region where people want to live, work, and visit—defined by strong communities, accessible housing, and rich cultural and recreational experiences.



Foster a Dynamic Business Ecosystem

A region where businesses of all sizes thrive through innovation, collaboration, and opportunity—creating a resilient and diverse economy.

Actions	Collaborators	Funding Sources
Objective 1.1: Strengthen existing industries and attract new industries through collaboration.		
<ul style="list-style-type: none">- Continue efforts to attract and retain companies across various sectors to build a more resilient and diversified economy.- Facilitate stronger collaboration among local governments, businesses, and economic development organizations to share targets, align development efforts, and identify complementary industry clusters across localities.	Local Governments, EDCs, Regional Economic Development Entities (OA, HCEDP, WilcoEDP, CAPCOG), Economic Development and Tourism Office within the Office of the Governor, EDA	Local funds & incentives, Texas Enterprise Fund, TDA, EDA, USDA, SBA, private sector
Objective 1.2: Continue to promote entrepreneurship and innovation across the region		
<ul style="list-style-type: none">- Continue investing in entrepreneurial support systems such as incubators, accelerators, and networking events that encourage innovation and business growth.- Provide specialized resources and initiatives for rural areas to foster entrepreneurship, including mobile business training, access to broadband, and region-specific business incubators.	Local Governments, EDCs, Chambers. Regional Economic Development Entities (OA, HCEDP, WilcoEDP, CAPCOG), Economic Development and Tourism Office within the OOG, SBA, EDA	Local funds & incentives, Texas Enterprise Fund, TDA, EDA, USDA, SBA, private sector
Objective 1.3: Promote tourism as a driver of economic growth		
<ul style="list-style-type: none">- Prioritize investments in infrastructure such as visitor centers, public restrooms, and enhanced public spaces.- Continue to support local festivals and cultural events that can attract visitors while emphasizing the region's identity.- Leverage the resources and marketing opportunities provided by the Office of the Governor including certifications, to enhance the region's visibility as a premier travel destination.	Local Governments, EDCs, Chambers, Local Businesses, THLA, Travel Texas within the Office of the Governor	Local funds (HOT, EDC funds), TDA, TPWD, TCA, EDA, NEA, private sector



Advance Workforce Development

A region where residents can access meaningful career pathways and lifelong learning, and where employers find the skilled, adaptable talent they need to grow and compete.

Actions	Collaborators	Funding Sources
Objective 2.1: Build a skilled, adaptable workforce that meets the needs of regional industries.		
<ul style="list-style-type: none"> - Expand partnerships with local employers and educational institutions to align curricula with industry needs. - Continue to promote apprenticeships and work-based learning programs for middle-skill and technical occupations. 	WFSCA, WSRCA, Educational Institutions, Local Employers, Industry Associations	Local funds, TWC, THECB, DOL, EDA, DOE, USDA
Objective 2.2: Increase access to workforce development resources in rural areas.		
<ul style="list-style-type: none"> - Build on partnerships with local employers to increase job training and retention in rural communities. - Expand mobile training units and remote learning platforms to deliver workforce development resources to rural communities. 	WSRCA, Educational Institutions, Local Employers, Industry Associations	Local funds, TWC, THECB, DOL, EDA, DOE, USDA
Objective 2.3: Build on wrap-around services necessary for trainees and workers.		
<ul style="list-style-type: none"> - Continue to partner with local organizations to provide wrap-around services (transportation vouchers, subsidized childcare) for participants in training programs. 	WSRCA, Educational Institutions, Local Employers, Industry Associations	Local funds, TWC, THECB, DOL, EDA, DOE, USDA



Improve Infrastructure & Connectivity

A region powered by modern, reliable infrastructure that connects communities, supports economic growth, and prepares us for the future.

Actions	Collaborators	Funding Sources
Objective 3.1: Improve transportation infrastructure to support economic growth and regional connectivity.		
<ul style="list-style-type: none">- Identify and prioritize critical transportation projects to ease congestion and improve connectivity.- Seek state and federal funding to expand roadways and improve public transportation options.- Support the development of intermodal transportation hubs that integrate road, rail, and air options to improve regional connectivity and enhance travel reliability.	Local Governments, Public Transit Agencies, CAMPO, CAPCOG, TxDOT, USDOT	Local tax initiatives & bond measures, TxDOT, USDOT
Objective 3.2: Expand broadband infrastructure, especially in underserved rural and unincorporated areas.		
<ul style="list-style-type: none">- Secure funding for broadband expansion through state and federal programs.- Collaborate with private sector partners to invest in broadband infrastructure.- Develop regional plans for universal broadband coverage to ensure access in rural areas.	Local Utility Providers, Broadband Providers, BDO, NTIA	BDO, NTIA, private sector partnerships
Objective 3.3: Upgrade and modernize water infrastructure to ensure reliable service and support future growth.		
<ul style="list-style-type: none">- Assess current water infrastructure capacity and identify areas requiring investment.- Secure funding for water system upgrades through state and federal grants.- Prioritize the construction of new water treatment facilities to accommodate population growth and business needs.	Local Utility Providers, Local Water Districts, TWDB	Local utility funding, TWDB, TDA, TCEQ, EDA, EPA, USDA, private investment



Enhance Quality of Place & Livability

A region where people want to live, work, and visit—defined by strong communities, accessible housing, and rich cultural and recreational experiences.

Actions	Collaborators	Funding Sources
Objective 4.1: Promote workforce housing development near key employment hubs.		
<ul style="list-style-type: none">- Identify potential areas for new housing developments near growing employment centers.- Offer incentives for developers, employers, and others to build housing for workers	Local Governments, Housing Authorities, Private Developers, Non-Profit Organizations, CDFIs	Local incentives, TDHCA, TSAHC, USDA, HUD, private and nonprofit funding
Objective 4.2: Improve community amenities to enhance livability.		
<ul style="list-style-type: none">- Increase investment in public parks and recreational spaces.- Expand access to high-quality healthcare services, particularly in rural areas.	Local Governments, Healthcare Providers, Community Organizations	Local funds, TPWD, TDA, LCRA, TDSHS, THHSC, USDA, private sector partnerships

Performance Measures

These performance measures will be used to monitor the changing economic conditions across the region and assess progress towards the goals outlined in the CEDS. Regularly reviewing these metrics will allow regional partners to evaluate the effectiveness of implemented strategies, identify emerging challenges, and adjust the strategy as needed to stay aligned with long-term economic development objectives.



Foster a Dynamic Business Ecosystem

- Number of jobs by industry
- Location quotients by industry
- Number of businesses
- Volume of small business lending
- Direct travel spending, direct employment, direct earnings, and direct tax receipts (Travel Texas)



Advance Workforce Development

- Number of people employed
- Labor force participation
- Unemployment rates
- High school graduation rates
- Number of people graduating from higher education
- Participation in workforce training activities (employers and people served)



Improve Infrastructure & Connectivity

- Daily vehicle miles travelled by total of lane miles in the region
- Investment in transportation infrastructure (TxDOT)
- Household internet access by speed
- Daily water usage and system capacity



Enhance Quality of Place & Livability

- Total number of home sales, median home price, and months inventory
- State investment in public park facilities
- Total number of hospital facilities and bed counts

Glossary

ACRONYM	FULL NAME
ACS	American Community Survey (by the U.S. Census Bureau)
BDO	Broadband Development Office
BEA	U.S. Bureau of Economic Analysis
CAMPO	Capital Area Metropolitan Planning Organization
CAPCOG	Capital Area Council of Governments
CDFI	Community Development Financial Institution
CEDS	Comprehensive Economic Development Strategy
DOE	U.S. Department of Energy
DOL	U.S. Department of Labor
EDA	U.S. Economic Development Administration
EDC	Economic Development Corporation
EPA	U.S. Environmental Protection Agency
HCEDP	Hays County Economic Development Partnership
HOT	Hotel Occupancy Tax
HUD	U.S. Department of Housing and Urban Development
LCRA	Lower Colorado River Authority
LQ	Location Quotient (used to analyze industry concentration in a region)
NAICS	North American Industry Classification System
NEA	National Endowment for the Arts
NTIA	National Telecommunications and Information Administration
OA	Opportunity Austin
OOG	Office of the Governor (Texas)
PCMI	Per Capita Money Income. Reported by U.S. Census. Cash-only income.
PCPI	Per Capita Personal Income. Reported by BEA. All personal income, including investments.
SBA	U.S. Small Business Administration
SOC	Standard Occupational Classification
TCA	Texas Commission on the Arts
TCEQ	Texas Commission on Environmental Quality
TDA	Texas Department of Agriculture
TDHCA	Texas Department of Housing and Community Affairs
TDSHS	Texas Department of State Health Services
THECB	Texas Higher Education Coordinating Board
THHSC	Texas Health and Human Services Commission
THLA	Texas Hotel & Lodging Association
TPWD	Texas Parks and Wildlife Department
TSAHC	Texas State Affordable Housing Corporation

TWC	Texas Workforce Commission
TWDB	Texas Water Development Board
TXDOT	Texas Department of Transportation
USDA	United States Department of Agriculture
USDOT	United States Department of Transportation
WFSCA	Workforce Solutions Capital Area
WILCO EDP	Williamson County Economic Development Partnership
WRAP- AROUND SERVICES	Support services that address holistic needs (e.g., childcare, transportation, housing)
WSRCA	Workforce Solutions Rural Capital Area

Appendices

Figure 13: Migration Data by County, Residents Moving to CAPCOG Region

TOP PREVIOUS COUNTIES	MIGRATIONS IN 2022
Harris County, Tx	6,600
Bexar County, Tx	4,627
Los Angeles County, Ca	3,131
Dallas County, Tx	3,112
Bell County, Tx	3,069
Santa Clara County, Ca	2,715
King County, Wa	1,868
Tarrant County, Tx	1,862
Cook County, Il	1,682
Collin County, Tx	1,626
Maricopa County, Az	1,564
San Diego County, Ca	1,520
Orange County, Ca	1,490
Alameda County, Ca	1,466
Fort Bend County, Tx	1,333
Comal County, Tx	1,271
Denton County, Tx	1,181
Montgomery County, Tx	1,120
Guadalupe County, Tx	1,041
El Paso County, Tx	875
Hidalgo County, Tx	874
Brazos County, Tx	859
Clark County, Nv	712
Riverside County, Ca	707
Nueces County, Tx	693
New York County, Ny	684
San Francisco County, Ca	661
Mclennan County, Tx	658
Kings County, Ny	649
Middlesex County, Ma	598
Miami-Dade County, Fl	582
Contra Costa County, Ca	569
Lubbock County, Tx	550
Cameron County, Tx	545
Galveston County, Tx	540

Hennepin County, Mn	523
San Mateo County, Ca	523
Washington County, Or	512
Denver County, Co	486
Snohomish County, Wa	454
San Bernardino County, Ca	443
Oakland County, Mi	425
El Paso County, Co	402
Broward County, Fl	401
Sacramento County, Ca	392
Fairfax County, Va	377
Brazoria County, Tx	376
Salt Lake County, Ut	375
Coryell County, Tx	359
Ventura County, Ca	357

Source: Lightcast

Figure 14: Race & Ethnicity Data

	UNITED STATES		TEXAS		CAPCOG	
	Count	Percent	Count	Percent	Count	Percent
Total Population	332,387,540	-	29,640,343	-	2,485,121	-
Hispanic Or Latino (Of Any Race)	63,131,589	19.0%	11,697,134	39.5%	781,610	31.5%
White Alone	193,338,267	58.2%	11,832,668	39.9%	1,265,992	50.9%
Black Or African American Alone	39,981,609	12.0%	3,528,533	11.9%	166,665	6.7%
American Indian And Alaska Native Alone	1,751,338	0.5%	44,974	0.2%	2,927	0.1%
Asian Alone	19,106,873	5.7%	1,557,270	5.3%	160,497	6.5%
Native Hawaiian And Other Pacific Islander Alone	565,623	0.2%	24,165	0.1%	1,509	0.1%
Some Other Race Alone	1,646,202	0.5%	105,597	0.4%	12,293	0.5%
Two Or More Races	12,866,039	3.9%	850,002	2.9%	93,628	3.8%

Source: U.S. Census Bureau, 2023 ACS 5-year Estimates

Figure 15: Per Capita Income Data

	2023 ACS 5-YEAR ESTIMATES	2023 BEA PCPI
United States	78,538	\$69,810
Texas	76,292	-
Region	-	\$79,882
Bastrop County	82,730	\$47,331
Blanco County	87,564	\$78,045
Burnet County	77,158	\$67,112
Caldwell County	68,503	\$44,202

Fayette County	76,541	\$72,230
Hays County	85,827	\$64,671
Lee County	66,000	\$59,542
Llano County	65,636	\$72,121
Travis County	97,169	\$91,887
Williamson County	108,309	\$72,828

Source: 2023 Per Capita Money Income (ACS 5-year PCMI) and 2023 Per Capita Personal Income (BEA PCPI)

Figure 16: Unemployment Rates

24 MONTH UNEMPLOYMENT RATE	
U.S.	3.85
Bastrop County, Tx	3.48
Blanco County, Tx	2.82
Burnet County, Tx	3.12
Caldwell County, Tx	3.65
Fayette County, Tx	3.37
Hays County, Tx	3.35
Lee County, Tx	3.24
Llano County, Tx	3.59
Travis County, Tx	3.33
Williamson County, Tx	3.51
CAPCOG Region	3.38

Source: 24-month Avg. BLS Unemployment Rate ending January 2025

Figure 17: Number of Jobs by Industry, 2020, 2025, 2030

INDUSTRIES	2020 JOBS	20-25 GROWTH	2025 JOBS	25-30 GROWTH	2030 JOBS
Accommodation And Food Services	101,731	39%	141,753	9%	154,556
Administrative And Support And Waste Management And Remediation Services	73,959	30%	95,935	12%	107,714
Agriculture, Forestry, Fishing And Hunting	5,141	19%	6,111	10%	6,743
Arts, Entertainment, And Recreation	16,690	49%	24,796	12%	27,665
Construction	87,783	24%	109,074	9%	119,415
Educational Services	23,741	31%	31,065	11%	34,506
Finance And Insurance	51,289	23%	62,835	12%	70,091
Government	194,850	9%	212,917	5%	224,418
Health Care And Social Assistance	113,463	27%	143,805	12%	161,137
Information	39,321	26%	49,739	14%	56,698
Management Of Companies And Enterprises	6,625	296%	26,218	30%	34,170
Manufacturing	67,323	21%	81,201	11%	89,729

Mining, Quarrying, And Oil And Gas Extraction	4,405	2%	4,506	6%	4,762
Other Services (Except Public Administration)	67,686	19%	80,450	8%	87,229
Professional, Scientific, And Technical Services	132,457	32%	175,317	14%	199,537
Real Estate And Rental And Leasing	28,908	22%	35,277	11%	39,159
Retail Trade	114,588	14%	130,907	6%	139,298
Transportation And Warehousing	29,457	35%	39,733	14%	45,265
Unclassified Industry	437	188%	1,259	18%	1,487
Utilities	2,946	32%	3,896	12%	4,346
Wholesale Trade	51,670	0%	51,704	4%	53,976
	1,214,470		1,508,498		1,661,901

Source: Lightcast

Figure 18: Detailed Industry Data for CAPCOG Region

NAICS	DESCRIPTION	2024 JOBS	AVG. EARNINGS PER JOB	2024 EMPLOYMENT CONCENTRATION	2024 GRP
11	Agriculture, Forestry, Fishing and Hunting	5,910	\$55,643	0.35	\$1,189,266,392
21	Mining, Quarrying, and Oil and Gas Extraction	4,405	\$143,075	0.87	\$6,253,467,877
22	Utilities	3,725	\$166,386	0.75	\$2,648,235,908
23	Construction	105,272	\$89,461	1.25	\$14,430,157,658
31	Manufacturing	78,254	\$147,327	0.71	\$18,962,800,798
42	Wholesale Trade	50,868	\$150,874	0.97	\$17,481,915,647
44	Retail Trade	128,049	\$55,117	0.94	\$14,204,413,009
48	Transportation and Warehousing	37,774	\$66,534	0.6	\$3,761,196,037
51	Information	47,447	\$180,953	1.81	\$25,018,128,867
52	Finance and Insurance	60,474	\$149,923	1.03	\$20,622,511,884
53	Real Estate and Rental and Leasing	33,944	\$85,277	1.33	\$12,864,236,196
54	Professional, Scientific, and Technical Services	167,210	\$160,236	1.64	\$37,564,984,729
55	Management of Companies and Enterprises	23,587	\$180,865	1.09	\$5,926,167,832
56	Administrative and Support and Waste Management and Remediation Services	92,060	\$70,472	1.07	\$9,452,832,422
61	Educational Services	29,792	\$58,772	0.8	\$2,139,923,813
62	Health Care and Social Assistance	138,075	\$80,614	0.72	\$13,518,045,992
71	Arts, Entertainment, and Recreation	23,773	\$44,748	0.91	\$1,817,594,108

72	Accommodation and Food Services	137,022	\$36,027	1.13	\$8,406,651,102
81	Other Services (except Public Administration)	78,373	\$49,797	1.08	\$5,288,864,840
90	Government	209,245	\$87,689	0.99	\$21,159,522,260
99	Unclassified Industry	1,188	\$76,887	0.53	Insf. Data
		1,456,446	\$95,499		

Source: Lightcast

Figure 19: Number of Jobs by Occupation, 2020, 2025, 2030

SOC	DESCRIPTION	2020 JOBS	20-25 CHANGE	2025 JOBS	25-30 CHANGE	2030 JOBS
17-0000	Architecture and Engineering Occupations	27,206	15%	31,201	13%	35,113
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	27,706	17%	32,468	11%	35,922
37-0000	Building and Grounds Cleaning and Maintenance Occupations	41,532	22%	50,690	9%	55,429
13-0000	Business and Financial Operations Occupations	85,143	35%	115,268	12%	129,191
21-0000	Community and Social Service Occupations	17,374	14%	19,856	10%	21,815
15-0000	Computer and Mathematical Occupations	71,331	25%	89,012	17%	103,787
47-0000	Construction and Extraction Occupations	62,292	21%	75,335	10%	82,833
25-0000	Educational Instruction and Library Occupations	66,612	16%	77,365	7%	83,088
45-0000	Farming, Fishing, and Forestry Occupations	3,026	19%	3,613	10%	3,982
35-0000	Food Preparation and Serving Related Occupations	95,708	35%	128,769	9%	140,034
29-0000	Healthcare Practitioners and Technical Occupations	51,973	28%	66,672	13%	75,281
31-0000	Healthcare Support Occupations	36,776	23%	45,377	13%	51,453
49-0000	Installation, Maintenance, and Repair Occupations	43,711	29%	56,326	10%	61,817
23-0000	Legal Occupations	13,605	9%	14,826	9%	16,158
19-0000	Life, Physical, and Social Science Occupations	10,343	14%	11,838	11%	13,139
11-0000	Management Occupations	93,594	56%	146,173	11%	162,832
55-0000	Military-only occupations	2,626	13%	2,961	9%	3,242
43-0000	Office and Administrative Support Occupations	169,904	7%	181,871	6%	193,263

39-0000	Personal Care and Service Occupations	33,030	32%	43,543	11%	48,122
51-0000	Production Occupations	43,814	19%	51,937	10%	57,177
33-0000	Protective Service Occupations	23,263	20%	27,862	8%	30,213
41-0000	Sales and Related Occupations	122,303	14%	139,018	8%	150,116
53-0000	Transportation and Material Moving Occupations	71,599	35%	96,518	12%	107,898
99-0000	Unclassified Occupation	0	-	0	-	0
		1,214,470	24%	1,508,499	10%	1,661,902

Source: Lightcast

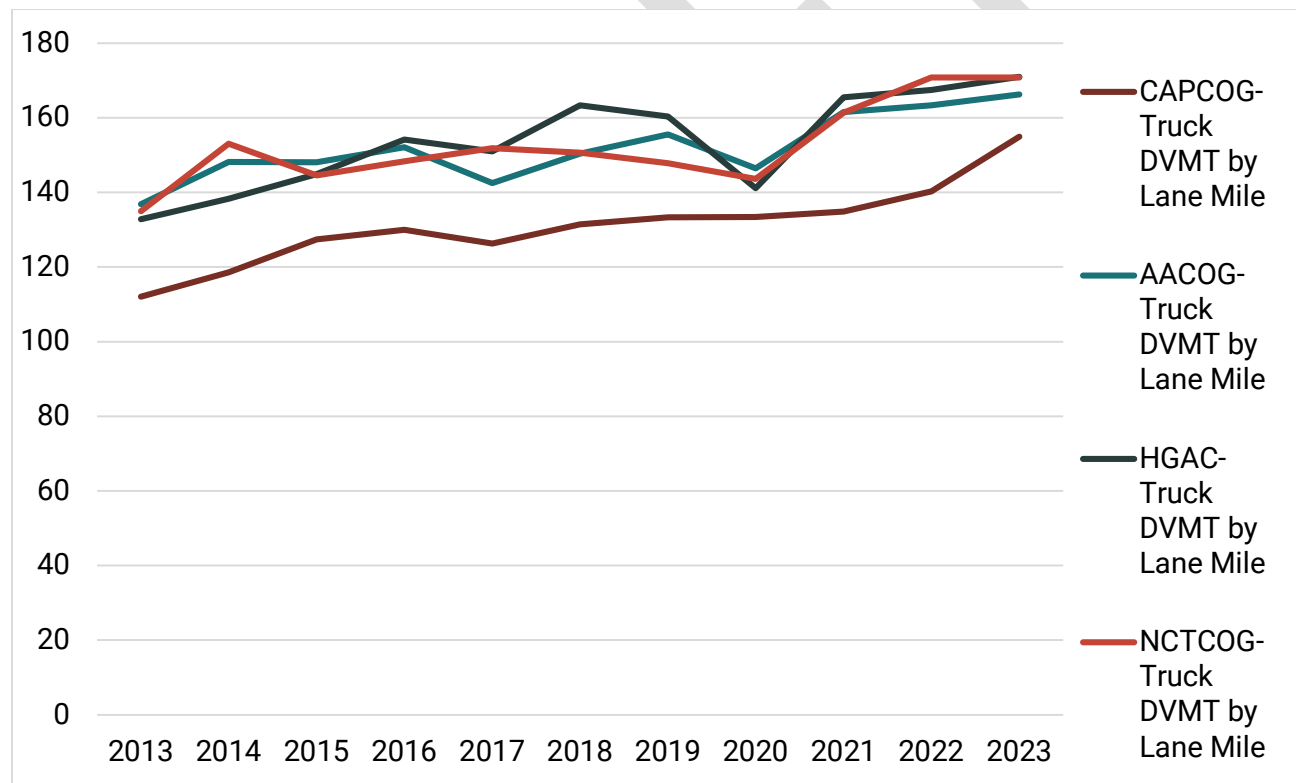
Figure 20: Detailed Occupation Data for CAPCOG Region

SOC	DESCRIPTION	2024 JOBS	2024 EMPLOYMENT CONCENTRATION	AVG. ANNUAL EARNINGS
11-0000	Management Occupations	140,564	1.31	\$133,777.88
13-0000	Business and Financial Operations Occupations	110,751	1.18	\$90,245.36
15-0000	Computer and Mathematical Occupations	84,390	1.83	\$111,297.50
17-0000	Architecture and Engineering Occupations	29,887	1.3	\$99,634.02
19-0000	Life, Physical, and Social Science Occupations	11,425	0.83	\$85,557.47
21-0000	Community and Social Service Occupations	19,250	0.73	\$58,572.03
23-0000	Legal Occupations	14,425	1.17	\$140,348.76
25-0000	Educational Instruction and Library Occupations	75,478	0.91	\$67,489.30
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	31,378	1.18	\$75,754.25
29-0000	Healthcare Practitioners and Technical Occupations	63,956	0.75	\$100,901.60
31-0000	Healthcare Support Occupations	43,546	0.64	\$37,868.24
33-0000	Protective Service Occupations	27,051	0.86	\$57,947.55
35-0000	Food Preparation and Serving Related Occupations	124,665	1.08	\$32,712.65
37-0000	Building and Grounds Cleaning and Maintenance Occupations	49,094	0.98	\$36,146.61
39-0000	Personal Care and Service Occupations	42,034	1.04	\$37,616.11
41-0000	Sales and Related Occupations	135,166	1.08	\$60,164.52
43-0000	Office and Administrative Support Occupations	177,045	1.07	\$48,200.52

45-0000	Farming, Fishing, and Forestry Occupations	3,488	0.36	\$39,559.28
47-0000	Construction and Extraction Occupations	72,720	1.11	\$54,126.47
49-0000	Installation, Maintenance, and Repair Occupations	54,476	0.95	\$56,034.92
51-0000	Production Occupations	50,057	0.65	\$45,172.39
53-0000	Transportation and Material Moving Occupations	92,708	0.74	\$45,044.87
55-0000	Military-only occupations	2,892	0.37	\$51,303.98
99-0000	Unclassified Occupation	0	0	\$0.00
		1,456,446		

Source: Lightcast

Figure 21: Figure 22: Truck Daily Vehicle Miles Traveled (DVMT) by Lane Miles, 2013-2023



Source: TxDOT

Figure 23: Detailed DVMT Data for CAPCOG and State, 2013-2018

	2013	2014	2015	2016	2017	2018
DVMT CAPCOG	49,529,747	49,428,888	55,987,358	57,980,008	57,406,660	61,101,299
DVMT STATE	669,961,848	665,722,240	707,184,160	741,155,383	747,891,910	772,705,427

TRUCK DVMT - CAPCOG	4,030,790	4,290,549	4,610,188	4,702,484	4,572,255	4,768,135
TRUCK DVMT- STATE	70,928,115	77,237,915	75,195,082	76,529,800	77,260,759	82,330,530
LANE MILES - CAPCOG	35,957	36,184	36,184	36,184	36,195	36,287
LANE MILES - STATE	676,266	677,723	677,723	677,919	680,067	681,118
DVMT BY LANE MILE - CAPCOG	1,377	1,366	1,547	1,602	1,586	1,684
DVMT BY LANE MILE - STATE	991	982	1,043	1,093	1,100	1,134
TRUCK DVMT BY LANE MILE - CAPCOG	112	119	127	130	126	131
TRUCK DVMT BY LANE MILE - STATE	105	114	111	113	114	121
CAPCOG POP	1,998,724	2,058,822	2,120,444	2,182,516	2,237,477	2,289,898
STATE POP	26,479,646	26,963,092	27,468,531	27,914,064	28,291,024	28,624,564
DVMT BY POP - CAPCOG	25	24	26	27	26	27
DVMT BY POP - STATE	25	25	26	27	26	27

Source: TxDOT

Figure 24: Detailed DVMT Data for CAPCOG and State, 2019-2023

	2019	2020	2021	2022	2023
DVMT CAPCOG	63,510,617	51,933,014	61,107,885	61,854,799	66,054,573
DVMT STATE	789,662,266	711,966,641	780,899,850	796,961,605	825,354,728
TRUCK DVMT - CAPCOG	4,873,941	4,890,959	5,176,659	5,432,348	6,026,182
TRUCK DVMT- STATE	83,266,118	79,624,836	90,092,340	94,083,507	95,079,511
LANE MILES - CAPCOG	36,560	36,655	38,388	38,737	38,887

LANE MILES - STATE	683,661	686,658	699,301	701,967	703,634
DVMT BY LANE MILE - CAPCOG	1,737	1,417	1,592	1,597	1,699
DVMT BY LANE MILE - STATE	1,155	1,037	1,117	1,135	1,173
TRUCK DVMT BY LANE MILE - CAPCOG	133	133	135	140	155
TRUCK DVMT BY LANE MILE - STATE	122	116	129	134	135
CAPCOG POP	2,352,770	2,422,127	2,479,637	2,553,676	2,606,903
STATE POP	28,986,794	29,360,759	29,527,941	30,113,488	30,727,890
DVMT BY POP - CAPCOG	27	21	25	24	25
DVMT BY POP - STATE	27	24	26	26	27

Source: TxDOT



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