



**Austin**

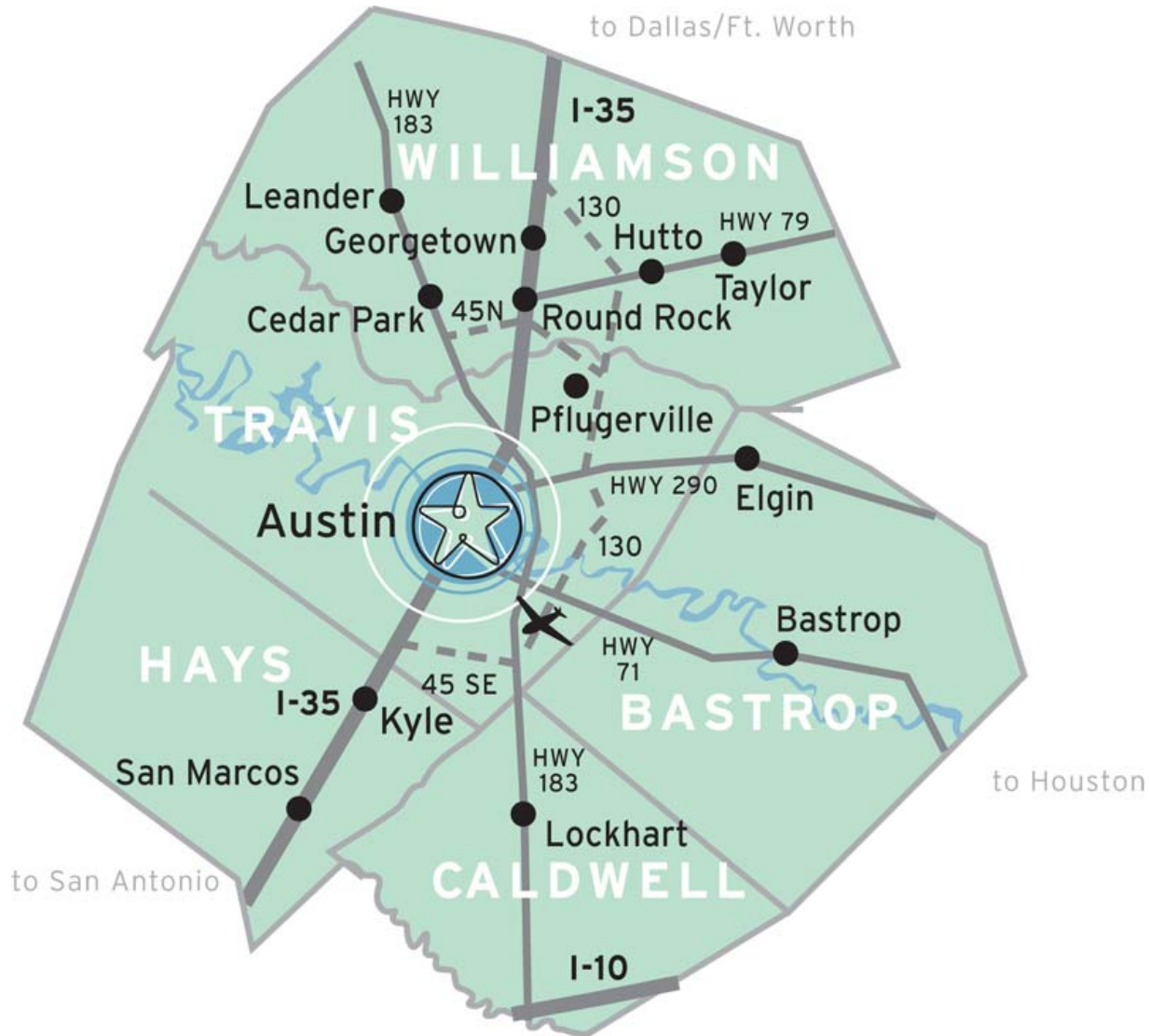
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**Greater Austin Chamber of Commerce**

# Austin's 5-County Region



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# The Austin MSA at a Glance



- Population: 1.45 million
- Labor force: 806,000
- Highest per capita income among Texas metros
- Nearly 71% of the population is under 45 (vs. 64% nationally)
- 8 colleges/universities: 116,000 students
- 39% of the population over 25 has a bachelor's degree (vs. 27% nationally)

# Population & Economic Growth



- Between 1980 and 2005, the Austin MSA resident population has grown from 585,000 to 1,453,000
- The number of non-farm jobs grew from 243,800 to 693,300 during this period
- The Austin MSA is projected to grow to 1,777,600 by 2010
- The Austin MSA is projected to add 136,000 jobs between 2000 and 2010

# Economic Growth Projections



## Austin MSA

## Compound Annual Growth Rate

	2005	2010	Austin	Texas	U.S.
Real Gross Product (2000 Dollars)	\$60.40 billion	\$75.56 billion	4.58%	4.24%	3.77%
Population	1,430,900	1,577,500	1.97	1.85	1.02
W&S Employment	718,100	793,700	2.02	1.70	1.49
Real Personal Income (2000 Dollars)	\$44.96 billion	\$55.53 billion	4.31	3.81	3.50
Retail Sales (Current Dollars)	\$42.45 billion	\$60.25 billion	7.25	6.85	NA

Source: The Perryman Group, December 2005.



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# EMPLOYERS

# Largest Private Sector Employers



Dell	17,000
Seton Healthcare Network	7,500
IBM	6,300
St. David's Healthcare	5,700
Freescale Semiconductor	5,400
Solectron Texas	3,000
Applied Materials	2,500
Advanced Micro Devices	2,000
AT&T	2,000
National Instruments	2,000
Girling Health Care	2,000
Temple-Inland	1,500
State Farm Insurance Co.	1,400
Apple Computer	1,400
Hospira	1,400
Sears Home Services	1,400
Samsung	1,300

# Headquartered in Austin



Active Power  
Ambion  
American  
    Achievement  
American Campus  
    Communities  
CarboMedics  
CFAN  
Cirrus Logic  
Citizens  
ClearCube Technology  
Compass Learning  
Crossroads Systems  
**Dell**  
DMX Digital Media  
    Xperience  
Encore Medical  
Esoterix

EZCorp  
Faulkner USA  
**Freescale**  
    **Semiconductor**  
Girling Health Care  
Golfsmith International  
Green Mountain Energy  
GSD&M  
Guaranty Financial  
    Services  
HealthTronics  
Holt, Rinehart &  
    Winston  
Hoover's  
Keller Williams Realty  
Luminex  
Motion Computing  
Motive

Multimedia Games  
National Instruments  
Perficient  
Pervasive Software  
Schlotsky's  
SEMATECH  
Sheshunoff  
    Information Services  
SigmaTel  
Silicon Laboratories  
Staktek  
TECO-Westinghouse  
    Motor Co.  
**Temple-Inland**  
Vignette  
Wayport  
**Whole Foods Market**

# Other Significant Operations of Major U.S. & Foreign Firms



3M  
Advanced Micro Devices  
Affiliated Computer Services  
Apple Computer  
Applied Materials  
AT&T  
BAE Systems  
Cingular  
Cisco Systems  
Computer Sciences Corporation  
Convergys  
Dresser  
Eastman Kodak  
Emerson  
Farmers Insurance Group  
Gemalto  
Harte-Hanks  
Hewlett-Packard  
Home Depot

IBM  
Intel  
Nextel Communications  
Oracle  
PPD Development  
Progressive Insurance  
Qualcomm  
Samsung  
Sears Home Services  
Siemens  
Solectron  
Spansion  
State Farm Insurance  
Sun Microsystems  
SYSCO  
Time Warner  
Tokyo Electron  
Unisys  
URS Corp.

# Recent New & Expanded Operations



Abbott Spine  
Accurate Elastomer  
Products  
Advanced Micro  
Devices  
Applied Micro Circuits  
Asuragen  
CFAN  
Compass Learning  
Convergys  
Dell  
Dimensional Fund  
Advisors

DMX Digital Media  
Xperience  
Freescale  
Semiconductor  
Gardco  
Hewlett-Packard  
Home Depot  
Intel  
Midway Games  
Motion Computing  
Motorola  
National Cancer  
Information Center  
NCSoft

Opus Healthcare  
Solutions  
Overwatch Systems  
PRC  
Progressive  
Insurance  
Qualcomm  
Samsung  
SigmaTel  
Silicon Laboratories  
Sunset Direct  
TASUS  
Wayport  
Wide-Lite

# Selected Major Technology Sector Employers



Dell	17,000	Emerson Process Mgt	560
IBM	6,300	Hewlett-Packard	550
Freescale	5,400	Silicon Laboratories	502
Solectron	3,000	Unisys	500
Applied Materials	2,500	Vignett	500
Advanced Micro Devices	2,300	SEMATECH	420
National Instruments	2,078	Toppan Photomasks	403
Hospira	1,450	Cisco Systems	400
Apple Computer	1,400	Home Depot Tech Center	400
Samsung	1,250	SigmaTel	400
3M	1,000	Sun Microsystems	400
PPD Development	1,000	Tokyo Electron	400
Spansion	1,000	BMC Software	383
Intel	800	Overwatch Systems	350
BAE Systems	700	Ambion	345

# Austin's Semiconductor Industry



Advanced Micro Devices	2,300	Qualcomm	152
Advanced Tech. Dev. Facility	185	Samsung	1,250
Alereon	70	SEMATECH	420
Applied Materials	2,500	SigmaTel	300
ARM	130	Silicon Labs	502
Austin Semiconductor	68	SMSC	113
Centaur Technologies	88	Spansion	1,000
Cirrus Logic	305	Staktek	90
Cypress Semiconductor	325	Sun Microsystems	400
Freescale Semiconductor	5,400	Texas Instruments	75
Intel Texas Design Center	700	Tokyo Electron America	400
Legerity	120	Toppan Photomasks	403
Molecular Imprints	100	Venkel	80
Motorola	200	Vitesse	65
NetEffect Semiconductor	55		

# Austin's Other Computer Related Manufacturers



3M Corp.	1,000
Airborn	300
Apple Computer	1,400
BAE Systems Integrated Defense Solutions	635
Cisco Systems	1,000
Crossroads Systems	170
Dell	17,000
Dresser Wayne	600
ETS-Lindgren	200
Motion Computing	150
Multimedia Games	297
National Instruments	2,038
Overwatch Systems	300
Siemens Intelligent Transportation Systems	230
Solectron Texas	2,900
Tyrex Group	250

# Austin's Software Industry



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Activant Solutions	300
Aspyr Media	150
BMC Software	383
CSC Financial Services Group	425
CyberTrader	275
Emerson Process Management	536
IBM Corp.	6,200
Metrowerks	200
Motorola	200
Motive	140
Multimedia Games	297
National Instruments	2,038
NCSOFT	230
Oracle	220
Sun Microsystems	400
Trilogy	300
Unisys	500
Vignette	500

# Austin's Wireless Industry



- Aleron
- AMD
- AT&T
- Cingular Wireless
- Cisco Systems
- Dell
- Freescale
- Gemalto
- IBM
- Intel
- Motion Computing
- Motorola
- Qualcomm
- SigmaTel
- Silicon Labs
- Simplified Development
- Spansion
- Texas Instruments
- Trillion Partners
- Wayport

# Austin's Biomedical Products & Pharmaceuticals Industry



- Abbott Spine
- Ambion
- Asuragen
- ATRbio
- CarboMedics
- Catalis Health
- CEDRA Corp.
- Clincial Pathology Laboratories
- E-MDs
- Encore Medical
- Esoterix
- Healthtronics
- Hospira
- Luminex
- Medical Carbon Research Institute
- Opus Healthcare Solutions
- PharmaForm
- PPD Development
- SCIREX Corp.
- Starkey Laboratories
- Stratagene
- TOPAZ Technologies

# Austin's Clean Energy Industry



- Active Power
- AeroVironment
- Austin Biofuels
- Austin Energy
- Clean Fuels USA
- EESstor Inc.
- Fallbrook Technologies
- Geotek
- Good & Associates
- Green Mountain Energy
- HelioVolt
- IBM Solutions Experience Lab
- Janets Solar
- Meridian Solar
- Rotec Designs
- Site Controls

# Automotive

## The Brain in Your Car Comes from Austin



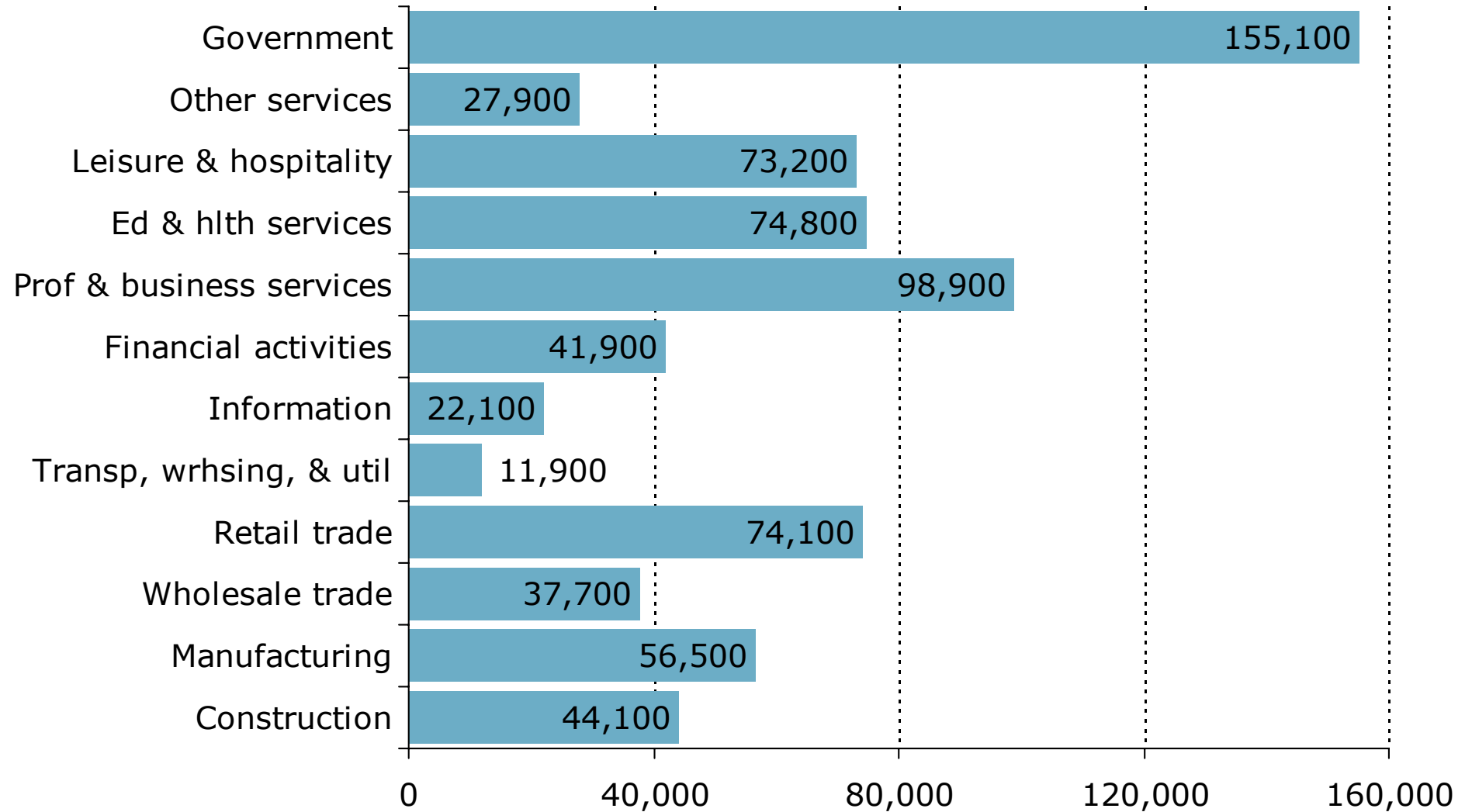
- **Cypress Semiconductor**—integrated circuits/chips used in engine controls, sensors, & various SRAM apps
- **Freescale Semiconductor**—Power PC chip is the most pervasive automotive semiconductor in the world
- **IBM**—voice recognition software for GM OnStar; Power PC chip
- **Manning NavComp**—vehicle tracking software & integration solutions for commercial fleets
- **Parrot**—chipsets, algorithms, & protocol stacks for OEMs & partner suppliers
- **Silicon Laboratories**—mixed signal ICs, incl. MCUs & satellite radio tuners for variety of automotive apps including XM Radio
- **SMSC NA Automotive**—Media Oriented Systems Transport (MOST) technology used in integrating infotainment into the automobile
- **Spansion**—flash memory chip fabrication for automotive, wireless & consumer electronics
- **Venkel**—surface mount passive components used in automotive electronics



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# **WORKFORCE**

# Employment by Industry Austin MSA, September 2006

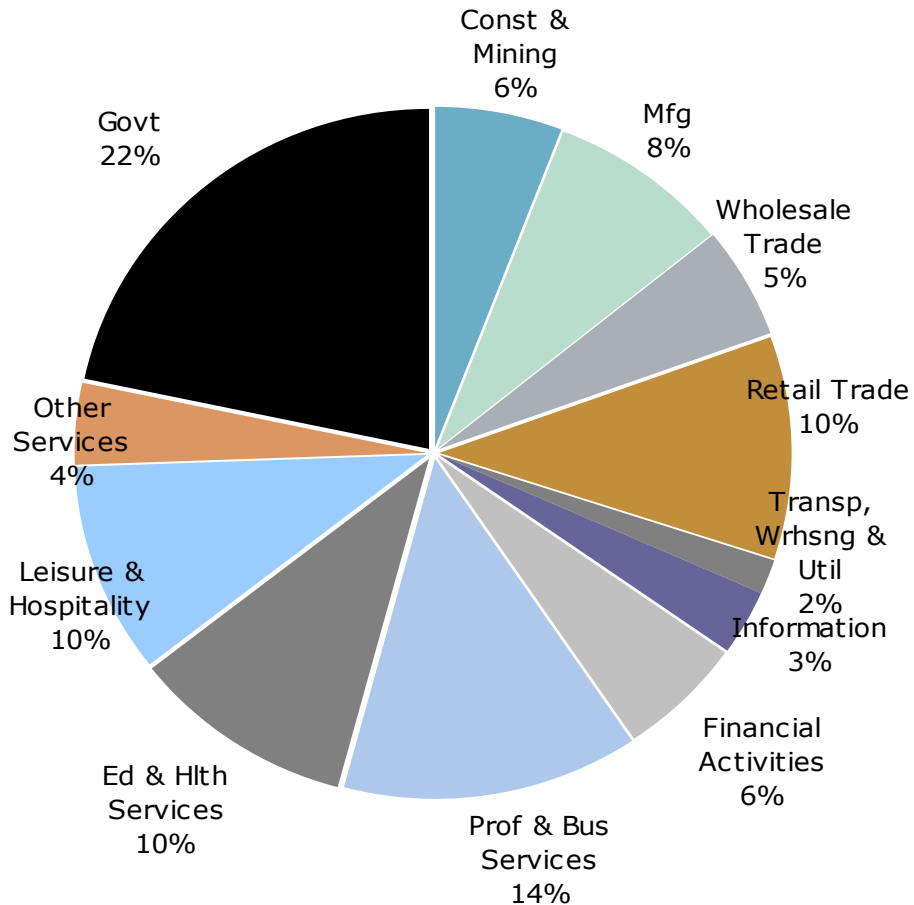


Source: Texas Workforce Commission, CES.

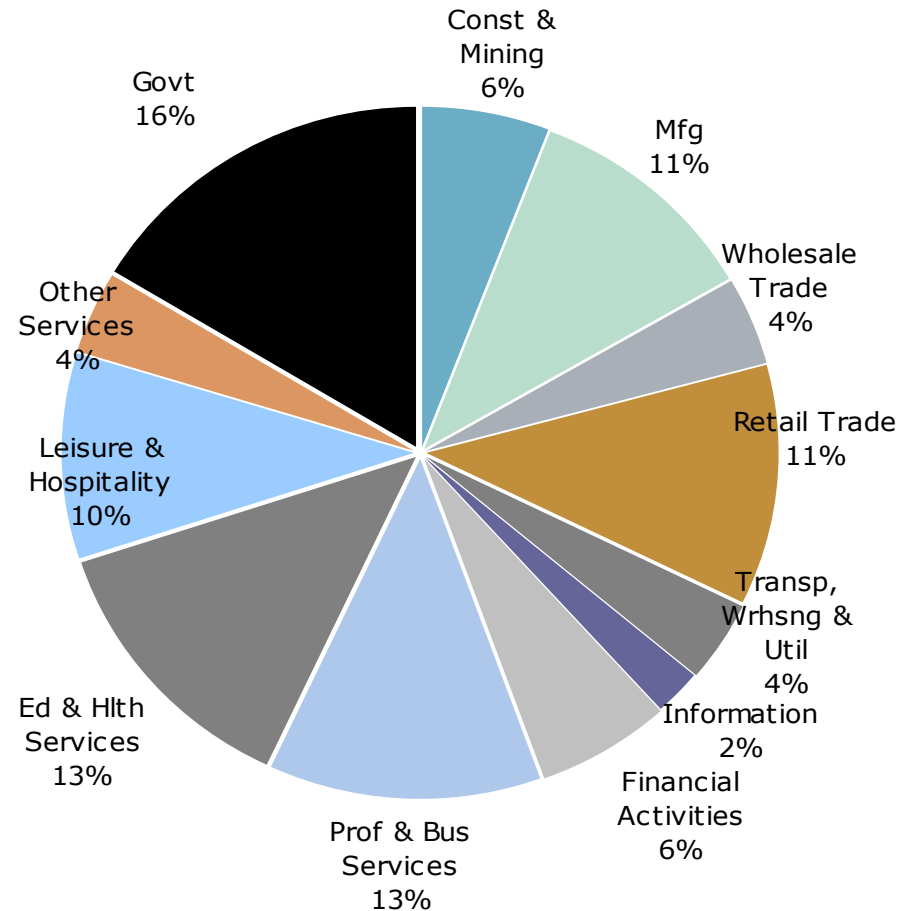
# Employment by Industry 2005



Austin MSA



United States



Source: Texas Workforce Commission.



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# EDUCATION

# Austin Metro Colleges & Universities

## Fall 2005 Enrollments



### Four-Year Institutions

The University of Texas, Austin	49,333
Texas State University, San Marcos	27,139
St. Edward's University, Austin	4,930
Southwestern University, Georgetown	1,301
Concordia University, Austin	1,221
Huston-Tillotson College, Austin	706

### Community Colleges

Austin Community College, Austin	30,538
Temple College-Taylor Center, Taylor	707
<b>GRAND TOTAL</b>	<b>115,875</b>
<b>TOTAL ENROLLMENTS WITHIN 100 MILES</b>	<b>327,679</b>

Source: Texas Higher Education Coordinating Board & National Center for Education Statistics.

# K-12 Education



- Austin's students rank among the best in the State
- Austin voters recently passed a \$520M bond package for school improvements
- There are 29 public school districts, 16 charter schools, and 69 private schools in the Austin MSA
- The largest school districts serving the metro are: Austin, Bastrop, Del Valle, Eanes, Georgetown, Hays, Leander, Pflugerville, Round Rock, and San Marcos
- The Austin school district has an enrollment of over 81,100 students in 17 high schools, 21 middle schools, 79 elementary schools, and 4 special campuses

# K-12 Education Highly Rated Public School Systems



## *Expansion Management's* "Education Quotient" Ratings

### **Gold Medal Districts**

Eanes—'03, '05, '06  
Lake Travis—'03  
Round Rock—'03, '05, '06

### **Green Light Districts**

Austin—'04, '05, '06  
Bastrop—'03  
Leander—'03  
San Marcos—'03, '04, '05, '06

### **Blue Ribbon Districts**

Austin—'03  
Leander—'04  
Georgetown—'03  
Pflugerville—'03, '04  
Round Rock—'04

### **Yellow Flag & Red Zone Districts**

None

# Austin Community College (ACC)



With approximately 30,500 students, ACC has seven permanent campuses and more than 70 teaching locations in the region. The ACC Highland Business Center and Downtown Center is extensively involved in the development of course work and training specifically designed for Austin industries. ACC maximizes community and customer satisfaction by identifying, developing, and delivering quality programs at an exceptional level of service that:

- Responds to business, government, & industry employee training needs
- Enhances the community's workforce & economic development efforts
- Helps fulfill personal, occupational, & career aspirations of individuals

Austin Community College provides contracted training to many local high tech companies.



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# TRANSPORTATION

# Air Service Non-stop Destinations from ABIA 2006



# Air Service Non-Stop Destinations from ABIA



Atlanta  
Chicago  
Dallas  
El Paso  
Las Vegas  
Memphis  
Minneapolis  
Newark  
Raleigh  
San Francisco  
Tampa

Baltimore  
Cincinnati  
Denver  
Harlingen  
Los Angeles  
Mexico City  
Nashville  
Orlando  
Salt Lake City  
San Jose  
Washington

Boston  
Cleveland  
Detroit  
Houston  
Lubbock  
Midland  
New York  
Phoenix  
San Diego  
St. Louis

# Air Service Major Carriers Serving Austin



Aeromexico  
American  
Delta  
Jet Blue  
Southwest

America West  
Continental  
Frontier  
Northwest  
United

Southwest has largest market share, 35.3%, followed by American with 26.9% and Continental with 12.1% (2006).



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# QUALITY OF LIFE

# Claims to Fame



**SXSW**



# Quality of Life



- What better balance can a city offer than being both the “Best Place for Business & Careers” & the “Live Music Capital of the World”?
- Austin pleases all in rankings ranging from “Best City for Relocating Families” to “Best City for Singles”.
- Other assessments consistently recognize the region as among the most inventive, creative, wired, rockin’, educated, fit & loved.

# Quality of Life



- Affordable & diverse neighborhoods, from urban lofts to hill country estates
- A climate made for outdoor enjoyment & recreation nearly year round
- Many professional & amateur sports venues & events
- More fine restaurants & clubs per capita than any other U.S. city
- A lush environment highlighted by parks, lakes & trails
- A creative culture that supports the arts, music & the theater
- Year-round festivals & celebrations for people of all ages

- Austin ranks as the 5<sup>th</sup> safest U.S. city in its population class
- Only El Paso, Honolulu, New York & San Jose have lower crime rates in that size class

Source: Morgan Quinto Press ranking based on 2004 FBI data for cities in excess of 500,000 population.

## Offenses Known to Police per 100,000 Population

	Violent Crime	Property Crime
Austin MSA	346.2	4,134.2
Texas	529.7	4,332.0
United States	469.2	3,429.8
U.S. Metros	509.7	3,598.8

Source: U.S. Federal Bureau of Investigation.

# Austin, Texas

## A Beautiful Place to Live



## Capitalize on existing strengths

- Locally headquartered companies
- Computer software
- Digital media
- Wireless
- Semiconductors
- Tourism

## Recruit & target diverse sectors

- Automotive
- Medical products
- Regional offices & headquarters
- Transportation & logistics

## Stimulate entrepreneurship & new enterprises

- R&D & technology commercialization
- “Next Wave” sectors: nanotech, biotech, clean energy
- Export assistance

## Market Austin effectively

- Identity building
- Getting the word out that Austin is “in the game”
- Chamber positioning

## Strategy

- Capitalize on existing strengths
- Recruit & target diverse sectors
- Stimulate entrepreneurship & new enterprises
- Market Austin effectively
- Improve regional competitiveness

## 5-Year Goal

- Creation of 72,000 jobs and \$2.9 billion in aggregate increase in payroll

## Improve our regional competitiveness

- Workforce quality
- Transportation system & infrastructure
- Permitting & regulatory climate

# Goals of 2007 BR&E Program



- Assessment of Regional Business Environment
- Company Relationship Building
- Identification of Economic Trends/Drivers
- Support Growth of Target Industry Sectors

# Assessment of Business Environment



- Portfolio Austin existing industry visits
- Monitoring of regional news/industry reports
- Monitoring of institutional analyses
- Quarterly reporting to local, regional and state stakeholder organizations/entities in both written and presentation forms

# Company Relationship Building



- Public relations/program marketing campaign
- CEO Council
- Quarterly existing industry newsletters
- Resource database
- Portfolio Austin visit follow-up
- Headquarter visits
- Customer service education/training/activities
- Company resource matching

# Identification of Economic Trends/Drivers



- Monthly/quarterly/yearly/as needed synchronist survey data analysis
- Cluster analyses for target industry sectors
- Dissemination of information to stakeholder entities

# Support Growth of Target Industry Clusters



- Coordination of Texas Emerging Technology Fund (TETF) applicants to regional industry sector resources to grow regional companies in targeted industry sectors
- Coordination of TETF advisory council/Central Texas Angel Network/AusTech Alliance/existing industry visits/regional incubators/regional industry associations to identify opportunities for regional expansions/recruitment in target industry sectors
- Coordinate existing industry councils for the biomedical and semiconductor industries in coordination with business attraction team
- Monitor meetings of Austin Wireless Alliance, Austin Gaming Association, THBI and clean energy council.