SEPTEMBER 2018

TARGET INDUSTRY ANALYSIS

BUDA ECONOMIC DEVELOPMENT CORPORATION

TIP strategies
AUSTIN • SEATTLE

DRAFT

ACKNOWLEDGEMENTS

TIP would like to thank the following individuals and organizations for their participation in this planning process.

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PROJECT CONSULTING TEAM

TIP STRATEGIES, INC., is a privately held economic development consulting firm with offices in Austin and Seattle. TIP is committed to providing quality solutions for public and private sector clients. Established in 1995, the firm's primary focus is economic development strategic planning.

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CONTENTS

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INTRODUCTION

The selection of target industries is traditionally based on a defined set of quantitative factors such as workforce access, available industrial sites, and industry concentration. The data are a good starting point, but qualitative and strategic considerations are just as important.

Target industries are a reflection of which industries are important to a local or regional economy, now and in the future. The identification of target industries matters less than what a community does to actually "target" an industry. Specific strategies to grow Buda's local economy through marketing and recruitment initiatives, incentives, and policies to support growth detailed in the Strategic Plan. However, strategies should not be applied in a haphazard manner. A successful target industry recruitment initiative must begin with a solid framework that employs quantitative, qualitative, and strategic methods to identify a narrow set of industries that represent the most promising opportunities for new investment and job growth.

THE TARGETING APPROACH

QUANTITATIVE
What do the data tell us?

QUALITATIVE
What have we learned about Buda's assets and challenges?

STRATEGIC
What larger trends and relationships will influence opportunities going forward?

In identifying target sectors, our team examined detailed data to identify which industries are well-established in the Austin metro area, how they performed in recent years, and how they are expected to perform in the near term. For this analysis we looked at factors including strategic assets, existing initiatives, critical mass, competitive advantage, growth prospects, and cross-sector synergies.

In the first phase of this project — the economic assessment — we reviewed employment using standard NAICS industry classifications. For the targeting analysis, we take this a step further by filtering employment within an industry "cluster" framework developed by the US Economic Development Administration in conjunction with the Institute for Strategy and Competitiveness at Harvard Business School.

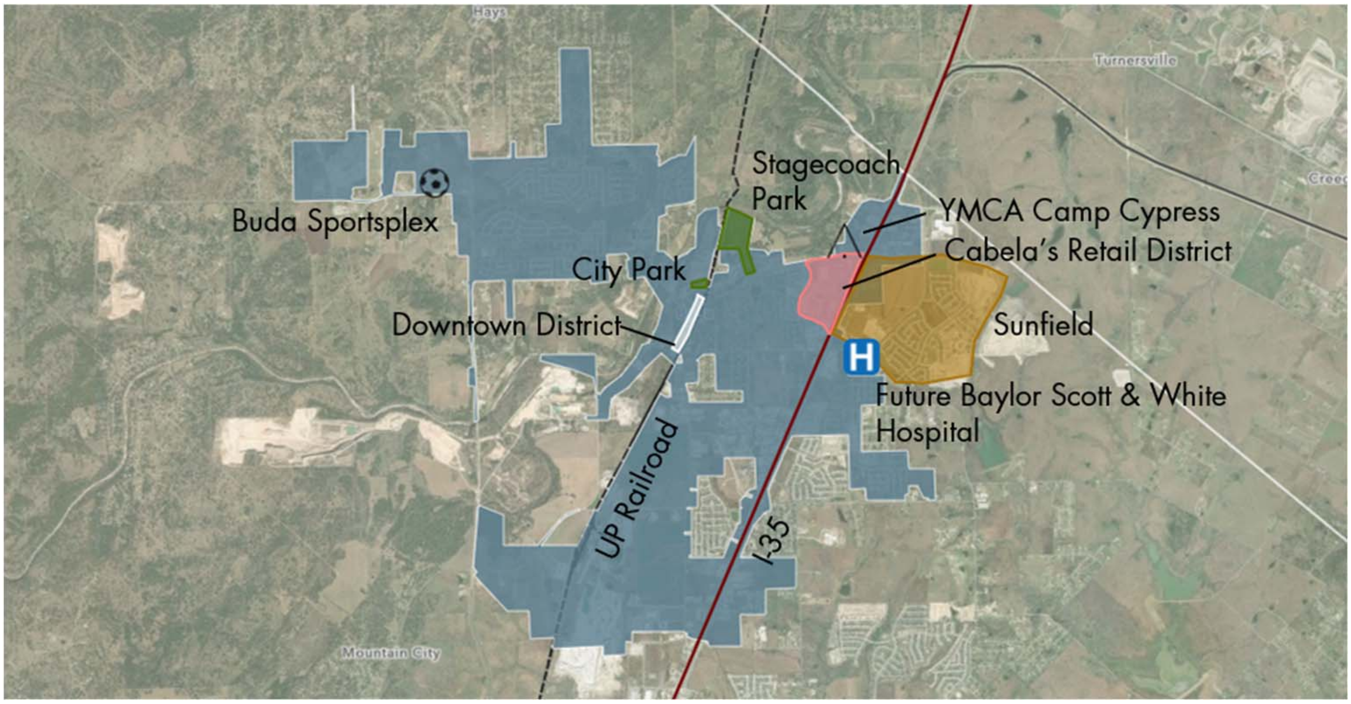
In addition, an analysis of capital investments relies on categories defined by fDi Markets, an operating subsidiary of the *Financial Times*. Next, the analysis of entrepreneurial investment relies on categories of venture capital investment defined by PricewaterhouseCoopers.

TARGET INDUSTRY ANALYSIS

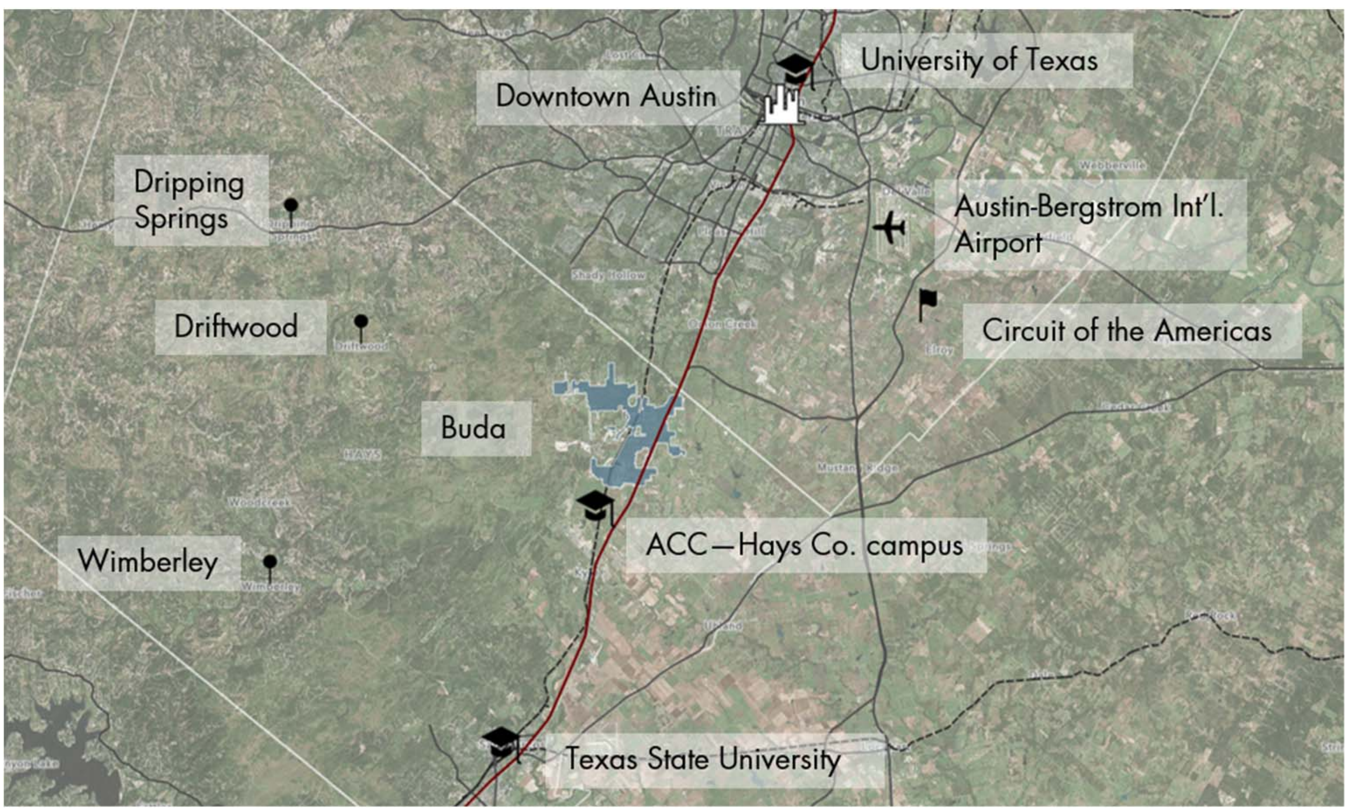
THE TARGETING PROCESS

Source: TIP Strategies

BUDA STRATEGIC ASSETS



REGIONAL ASSETS



Sources: TIP Strategies, Esri ArcGIS.

EMPLOYMENT CLUSTERS: TRADED VS LOCAL

LOCAL CLUSTERS

- Primarily serve local markets
- Present in virtually every market
- Location is not dependent upon competitive advantage

TRADED CLUSTERS

- Serve outside markets
- Free to choose where they locate
- Tend to be highly concentrated in a few regions that have specific advantage

WHY IT MATTERS

Increasing the ratio of traded-to-local clusters is a common strategy for enhancing economic prosperity. "Traded" clusters are emphasized by economic developers because they include industries and firms that typically produce goods and services for customers beyond the local region. These traded activities are thus more likely to produce externally generated revenues which can, in turn, help boost local tax coffers. As an example, a dentist office might serve local customers exclusively, while a manufacturing plant, a data center, or a hotel would typically serve paying customers beyond the local area. The ability of traded clusters to serve larger markets also presents greater opportunity for employment growth, whereas a dentist office might face more finite geographic limits to expansion.

The growth of traded clusters is important for local economic development even if these companies do not employ local residents or provide services desired by local residents. Because traded clusters bring in external revenue from outside the local economy, they contribute positively to the local tax base. A local tax base that is supported by external spending helps keep local property taxes low, while helping to maintain and enhance the level of municipal services.

Source(s): US Bureau of Labor Statistics; EMSI 2018.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.
Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

The following section (pages 5-15) includes a quantitative analysis of industry-specific employment patterns, hiring trends, and major investments in the Austin metro area. We have focused our analysis of industry trends primarily on the five-county Austin metro area instead of more narrowly focusing on Buda or Hays County. This helps provide a relevant context for understanding the growth opportunities in the larger region surrounding Buda. A solid foundation of knowledge about the regional economy is a necessary starting point for uncovering the most promising sectors for investment and job growth in Buda.

EMPLOYMENT CLUSTERS — WEIGHT (SIZE & CONCENTRATION)

TRADED CLUSTERS EMPLOYING THE MOST WORKERS LOCALLY IN 2017

LOCATION QUOTIENTS
←BELOW AVG ABOVE AVG→

	US	AUSTIN MSA	
	% of national employment	*% of local employment*	*LQ*
Business Services	5.9%	8.4%	1.42
Education & Knowledge Creation	4.2%	4.4%	1.05
Distribution & E-commerce	3.7%	4.4%	1.17
IT & Analytical Instruments	0.8%	2.8%	3.65
Hospitality & Tourism	2.1%	1.8%	0.88
Marketing, Design, & Publishing	1.1%	1.6%	1.51
Financial Services	1.3%	1.6%	1.21
Federal Government (civilian)	1.4%	0.9%	0.64
Construction Products & Services	0.6%	0.7%	1.15
Insurance Services	0.9%	0.7%	0.77
Performing Arts	0.4%	0.5%	1.37
Transport. & Logistics	1.3%	0.5%	0.40
Federal Government (military)	1.2%	0.4%	0.33
Food Processing & Mfg.	0.7%	0.3%	0.47
Oil & Gas Production & Transport.	0.4%	0.3%	0.79
OTHER TRADED CLUSTERS	7.8%	2.9%	
ALL LOCAL CLUSTERS	66.2%	67.7%	
Total	**100.0%**	**100.0%**	

WHY IT MATTERS

While local clusters (such as dentist offices) typically account for a similar share of employment across communities of varying size, the share of total employment represented by traded clusters (such as automotive assembly plants) may differ dramatically from one community to the next. Traded clusters that account for a larger-than-average share of total employment can suggest areas of competitive advantage. This figure compares the distribution of employment by cluster in the US (first column) with the local area (second column). The third column uses location quotients (LQs) to convey the intensity of employment locally relative to the US. If a traded cluster represents 1% of US employment and 5% of local employment, its LQ would be 5.0, meaning that the traded cluster in the local area is 5 times as large as would be expected based on national patterns.

Source(s): US Bureau of Labor Statistics; EMSI 2018.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.
Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

EMPLOYMENT CLUSTERS — PROJECTED GROWTH

TRADED CLUSTERS WITH PROJECTED LOCAL JOB GAINS OF 25 OR MORE, 2017-2022

	US	AUSTIN MSA	
	5-year % change in national employment	*5-year % change in local employment*	*net gain*
Business Services	10.4%	22.8%	+20,726
Distribution & E-commerce	7.6%	10.3%	+4,875
Financial Services	6.3%	22.2%	+3,865
Hospitality & Tourism	6.8%	18.7%	+3,702
Marketing, Design, & Publishing	8.1%	20.3%	+3,590
Construction Products & Services	12.9%	29.1%	+2,082
Performing Arts	6.4%	17.9%	+1,063
IT & Analytical Instruments	4.0%	3.0%	+908
Transport. & Logistics	4.5%	16.0%	+890
Food Processing & Mfg.	6.9%	20.4%	+737
Education & Knowledge Creation	7.4%	1.5%	+724
Video Production & Distribution	12.2%	25.2%	+688
Federal Government (military)	1.0%	10.8%	+487
Oil & Gas Production & Transport.	1.7%	12.7%	+422
Federal Government (civilian)	-0.8%	3.7%	+364
Plastics	0.1%	16.8%	+251
Agricultural Inputs & Services	1.9%	12.1%	+249
Furniture	-0.3%	11.6%	+241
ALL TRADED CLUSTERS	5.5%	13.3%	+46,407
ALL LOCAL CLUSTERS	6.1%	13.8%	+101,044
Total	**5.9%**	**13.6%**	

WHY IT MATTERS

Understanding anticipated job growth in traded clusters is an essential element of the targeting process. This figure compares projected net job gains in percentage terms over a five-year horizon for the US (first column) and the local area (second column). The column on the far right shows projections (in numeric terms) for local net job gains in traded clusters in descending order. The last three rows of the exhibit—showing projected job growth aggregated for traded clusters, local clusters, and total employment—can help inform strategic discussions and refine goals for the future.

Source(s): US Bureau of Labor Statistics; EMSI 2018.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.
Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

TALENT DEMAND INDICATORS

ANALYSIS OF UNIQUE LOCAL JOB POSTINGS DURING CALENDAR YEAR 2017

INTENSITY OF JOB POSTINGS RELATIVE TO US
←BELOW AVG **ABOVE AVG→**

HIGH-DEMAND LOCAL OCCUPATIONS

	location quotient
Software Developers, Applications	2.40
Web Developers	2.13
Computer Occupations, All Other	1.93
Network & Computer Systems Administrators	1.70
Sales Reps., Wholesale & Mfg., Technical & Sci. Products	1.67
Management Analysts	1.62
Sales Representatives, Services, All Other	1.58
Marketing Managers	1.57
Computer Systems Analysts	1.57
Sales Managers	1.46
Computer User Support Specialists	1.40
Registered Nurses	1.30
First-Line Supervisors of Office & Admin. Support Workers	1.21
Customer Service Representatives	1.18
Maintenance & Repair Workers, General	1.08
Accountants & Auditors	1.04
First-Line Supervisors of Retail Sales Workers	0.99
First-Line Supervisors of Food Prep. & Serving Workers	0.98
Retail Salespersons	0.88
Heavy & Tractor-Trailer Truck Drivers	0.13

HIGH-DEMAND LOCAL SKILLS

	location quotient
Bilingual Spanish	5.79
Microsoft Office	3.20
Software As A Service	2.92
Scrum Agile Methodology	2.58
Python	2.49
Javascript	2.41
Agile Software Development	2.29
Web Services	2.28
Linux	2.28
Java	2.25
Hypertext Markup Language	2.07
Salesforce Crm Sfdc	2.06
Systems Development Life Cycle	2.05
Structured Query Language	1.73
Customer Relationship Management	1.58
Quality Control	1.44
Technical Support	1.44
Quality Assurance	1.29
Pediatrics	1.21
Preventive Maintenance	1.05

WHY IT MATTERS

An analysis of job postings can help reframe our understanding of the local job market from the employer's perspective rather than simply through the lens of government statistics. This back-of-the-envelope analysis uses job postings from the prior calendar year to identify the most sought-out occupations (first column) and the most frequently occurring words and phrases (second column). LQs are used to approximate the local intensity of recruiting efforts and illustrate employer demand for specific "hard skills." A help wanted ad that appears locally at 5 times the relative rate as the US would have an LQ of 5.0; likewise a specific skill that appears more frequently in local postings than the national average would have an LQ greater than 1.0, suggesting higher demand in the local market. The results should prompt strategic questions about the alignment of the region's talent pipeline with the needs of employers and with target (traded) clusters.

Source(s): CEB Talent Neuron; TIP Strategies.
Note: The two columns in this figure are independent analyses and should not be read or interpreted left-to-right.

INBOUND FIXED CAPITAL INVESTMENT

FOREIGN AND OUT-OF-STATE INVESTMENT 2008-2017

LOCATION QUOTIENTS

←BELOW AVG ABOVE AVG→

	US	AUSTIN MSA	
	% of national inbound investment	*% of local inbound investment*	*LQ*
Semiconductors	2.5%	43.7%	17.35
Real Estate	7.3%	13.6%	1.88
Software & IT services	5.2%	8.3%	1.59
Communications	7.4%	5.0%	0.67
Hotels & Tourism	2.3%	4.8%	2.09
Business Services	2.8%	4.3%	1.55
Alternative/Renewable energy	8.8%	4.0%	0.46
Financial Services	3.6%	3.3%	0.92
Business Machines & Equipment	0.3%	2.5%	9.95
Healthcare	0.9%	1.5%	1.63
Other Sectors	59.0%	0.0%	
Total	**100.0%**	**100.0%**	

WHY IT MATTERS

Industry analysis often focuses heavily, sometimes exclusively, on employment patterns. For a fuller understanding of local industry trends, a review of capital investment flows is useful. This figure compares the distribution (in percentage terms) of inbound investment by industry at the national and local levels. The first column shows cross-state and foreign investment in the US. The second column shows inbound investment into the local area from companies based out-of-state (including foreign investment), sorted in descending order. The column on the far right uses LQs to convey the intensity of capital investment in these sectors locally relative to the US. While the cluster definitions differ slightly from the EDA framework, the concepts are similar.

Source(s): fDi Markets; TIP Strategies.
Note(s): Inbound investment includes foreign and out-of-state sources. It excludes in-state sources of investment.

LEADING LOCAL JOB RECRUITERS IN TRADED SECTORS OF THE ECONOMY

ANALYSIS OF UNIQUE JOB POSTINGS IN BUDA & AUSTIN MSA DURING CALENDAR YEAR 2017

BUDA

RECRUITER	# OF JOB POSTINGS
Cabela's Inc.	136
Tuff Shed Inc.	57
Sunstate Equipment	39
Builders FirstSource	35
AHI SUPPLY LLC	32
Austin Recovery Family House	31
Hersha Hospitality	29
H-E-B	29
Best Version Media	28
Stripes Convenience Stores	27
Instacart	23
Rush Enterprises, Inc.	21
Texas Disposal Systems	21
The Dollar General	20
Comfort Suites Buda-Austin South	18
Commercial Metals Company	18
Cracker Barrel	17
Chili's	17
HHM	16
SUSSER HOLDINGS	15
Altitude Business Group	14
Brinker International	14
Pizza Hut	13
Celadon	13
McDonald's Corporation	12

AUSTIN

RECRUITER	# OF JOB POSTINGS
HCA - The Healthcare Company	6,829
DELL	5,791
Ascension Health	4,946
The University of Texas System	3,711
IBM	3,047
City of Austin, Texas	2,980
Oracle	2,544
ACCENTURE	2,206
Goodwill Industries	2,184
Spectrum	2,072
Austin Independent School District	2,023
Deloitte	1,910
Seton Health	1,893
Baylor Health Care System	1,749
Texas Dept of Health Services	1,699
Austin Medical Center	1,630
Apple Inc.	1,579
Omni Hotels	1,450
Virtual Computing Environment Company LLC	1,421
Baylor Scott & White Health	1,309
H-E-B	1,280
Health One	1,276
Compass Group	1,245
Army	1,224
Greensheet	1,102

Source: CEB Talent Neuron.

ENTREPRENEURIAL INVESTMENT

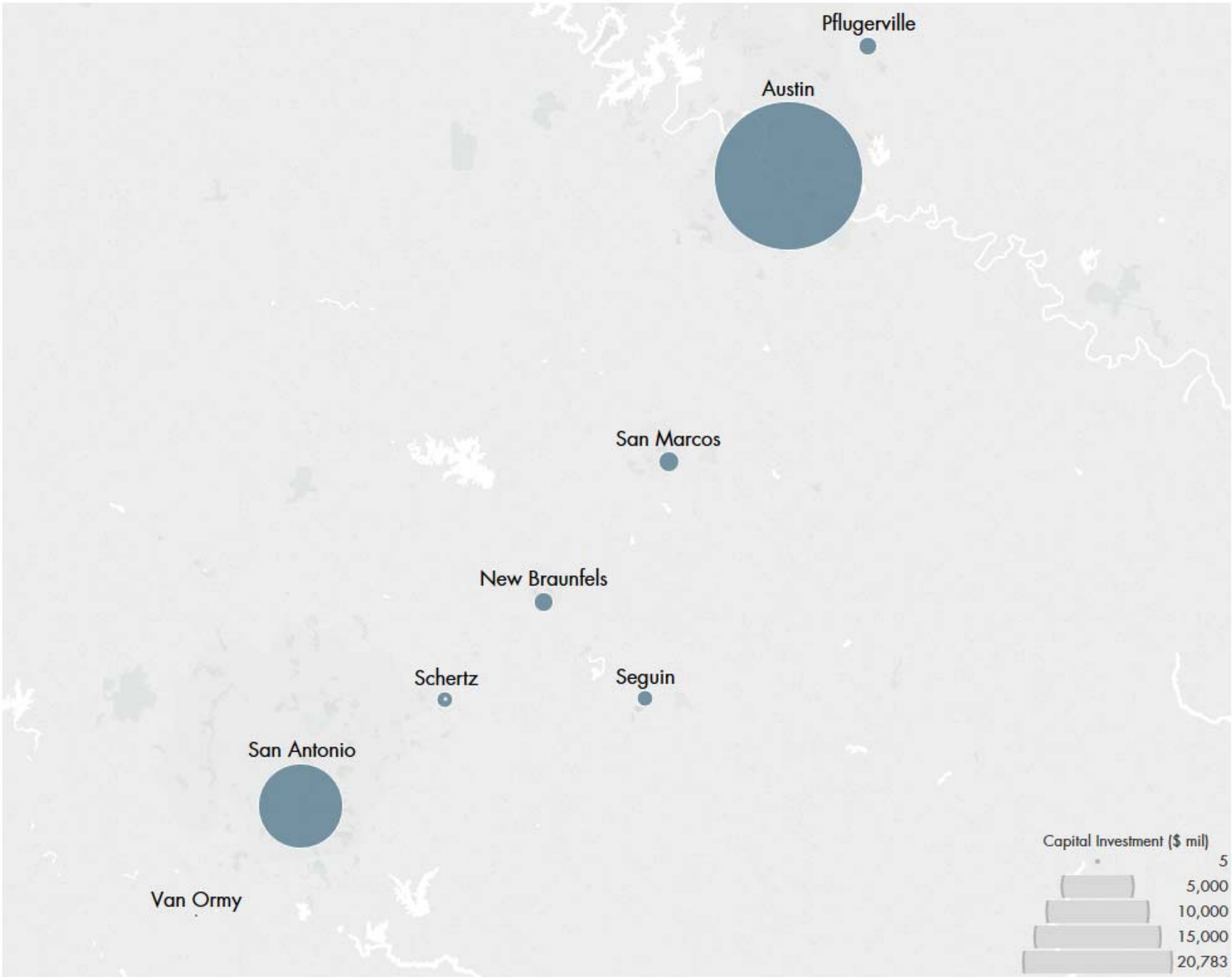
LEADING VENTURE EQUITY RECIPIENTS IN AUSTIN MSA DURING THE 2008-2017 PERIOD

COMPANY	VC* (In millions)	DESCRIPTION
Mozido	$307.2	Mozido is a global provider of digital commerce and payment solutions for both unbanked and developed markets.
HomeAway	$258.3	HomeAway offers a platform where travelers can book vacation homes, and rental owners can advertise and manage bookings.
Pivot3	$206.0	Pivot3 is the world's leading provider of dynamic hyperconverged solutions.
BigCommerce	$155.0	BigCommerce is a SaaS provider for merchants running online businesses.
Snap Kitchen	$154.2	Snap Kitchen is dedicated to bringing our customers flavorful, handcrafted food
RetailMeNot	$149.5	RetailMeNot is a marketplace for online coupons and deals that operates a portfolio of coupon and deal websites.
Spredfast	$138.1	Spredfast gives marketers solutions to manage their brand and connect with consumers in an increasingly social world.
Apollo Endosurgery	$113.3	Apollo Endosurgery develops medical devices for the diagnosis and treatment of gastrointestinal diseases.
SolarBridge Technologies	$101.0	SolarBridge Technologies commercializes power electronics technologies created at the University of Illinois.
Spiceworks	$98.0	Spiceworks is the professional network for the IT industry.
GreenRoad Technologies	$96.0	GreenRoad, is delivering the backbone for the future of vehicle safety in the new era of Intelligent Mobility.
Fallbrook Technologies	$94.5	Fallbrook Technologies develop and manufactures the NuVinci® CVP transmission technology and related products.
Xeris Pharmaceuticals	$85.5	Xeris Pharmaceuticals develops patient-friendly injectables for indications in diabetes, epilepsy, and immunology.
Kinnser Software	$79.9	Kinnser Software develops and distributes web-based software and support solutions for the home health industry.
Phunware, Inc.	$79.7	Phunware is a multiscreen platform and solution provider.
GFI Software	$78.0	GFI Software develops solutions that enable IT administrators to efficiently discover, manage and secure their business networks.
Mirna Therapeutics	$77.8	Mirna Therapeutics researches on and develops miRNA-directed human oncology therapies.
Illumitex	$74.5	Illumitex manufactures precision LEDs. LED lights and LED grow lights
Civitas Learning	$63.9	Making the most of the world's learning data to graduate a million more students per year, by 2025.
The Zebra	$63.0	The Zebra is an auto insurance comparison marketplace, enabling users to find the right coverage at the best price.

*cumulative venture capital
Source(s): PricewaterhouseCoopers, Crunchbase, TIP Strategies .

OUT-OF-STATE DIRECT INVESTMENT IN THE CENTRAL TEXAS IH-35 CORRIDOR*

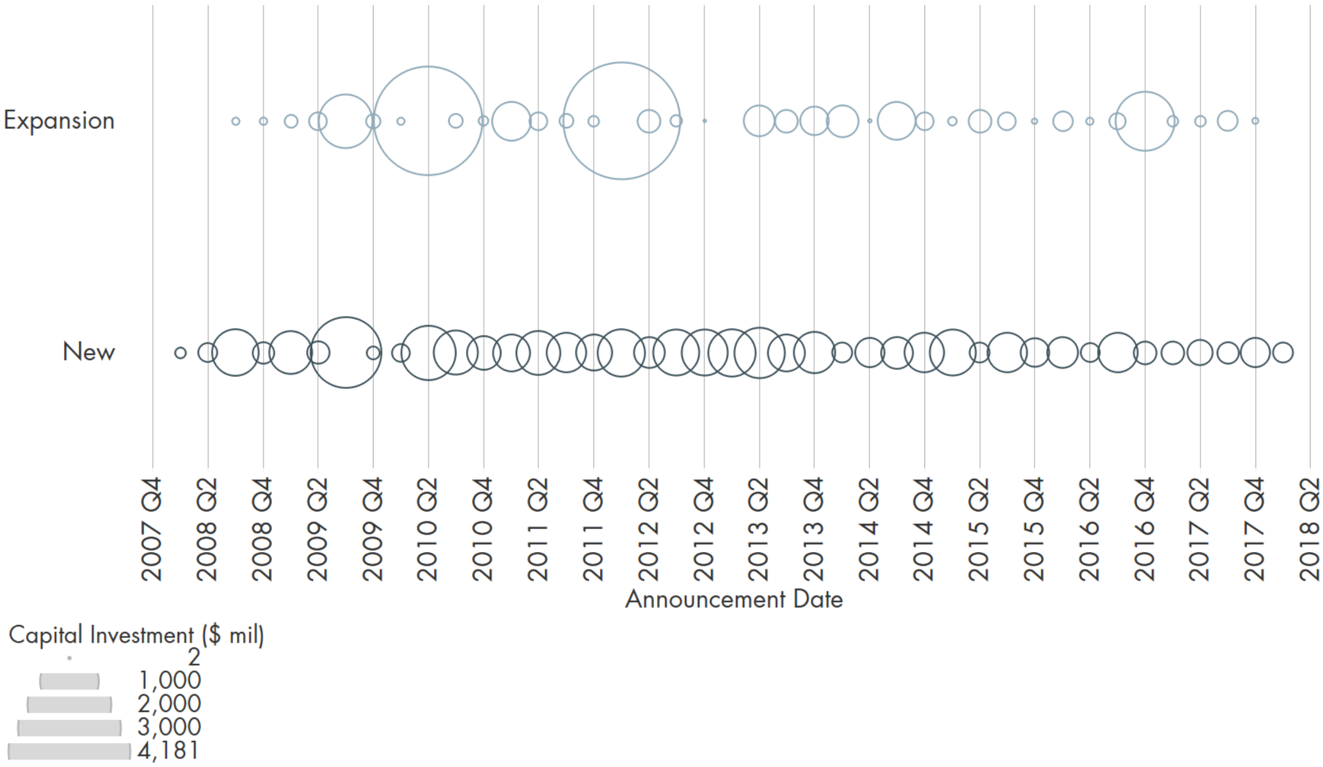
DIRECT INVESTMENT BY DESTINATION CITY SINCE 2008



*The Central Texas IH-35 corridor includes 5 counties: Travis, Hays, Comal, Guadalupe, and Bexar
Note: Does not include direct investments by companies headquartered in Texas
Sources: fDi Markets, TIP Strategies

OUT-OF-STATE DIRECT INVESTMENT IN THE CENTRAL TEXAS IH-35 CORRIDOR*

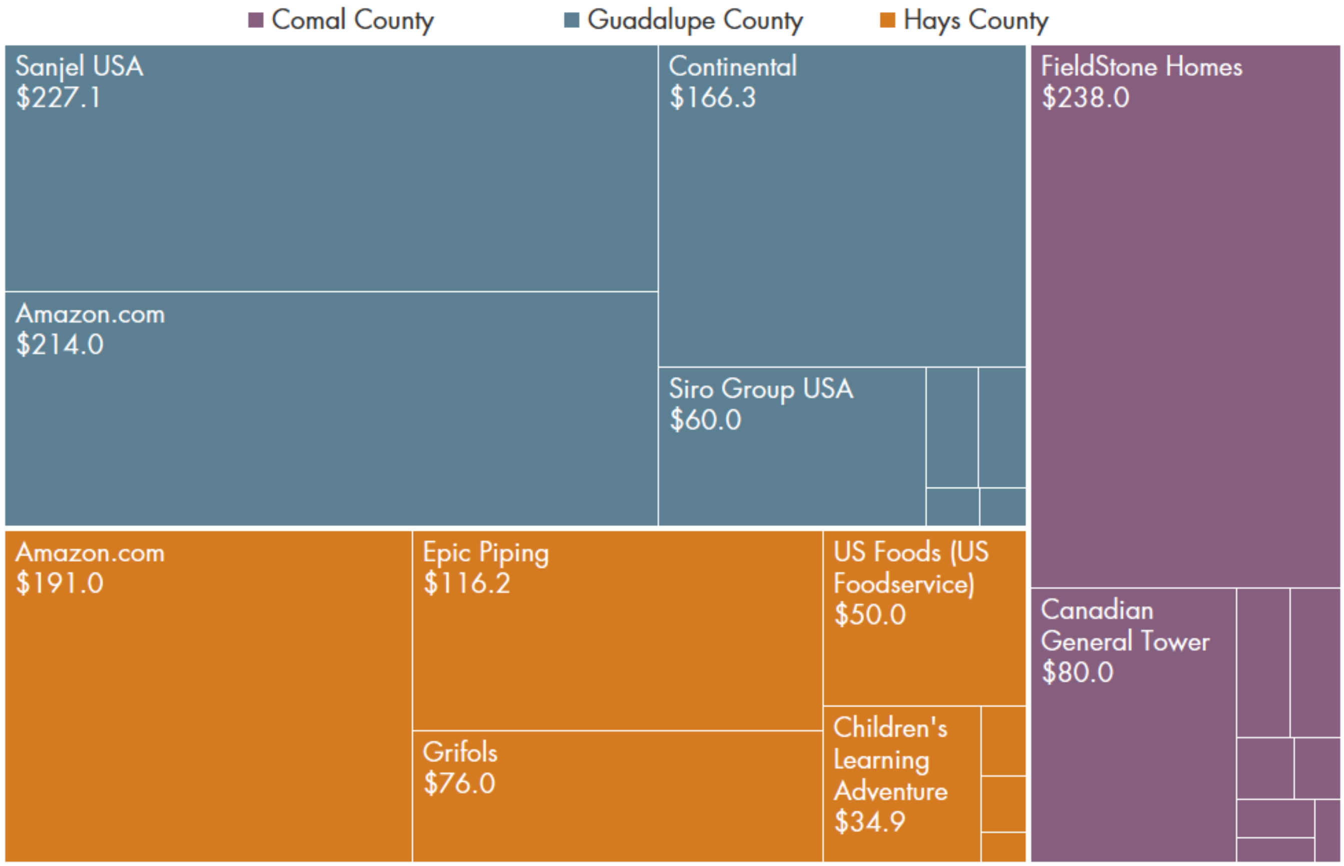
DIRECT INVESTMENT BY TYPE OF FACILITY SINCE 2008



*The Central Texas IH-35 corridor includes 5 counties: Travis, Hays, Comal, Guadalupe, and Bexar
Note: Does not include direct investments by companies headquartered in Texas
Sources: fDi Markets, TIP Strategies

OUT-OF-STATE DIRECT INVESTMENT IN THE CENTRAL TEXAS IH-35 CORRIDOR*

DIRECT INVESTMENT BY COMPANY SINCE 2008



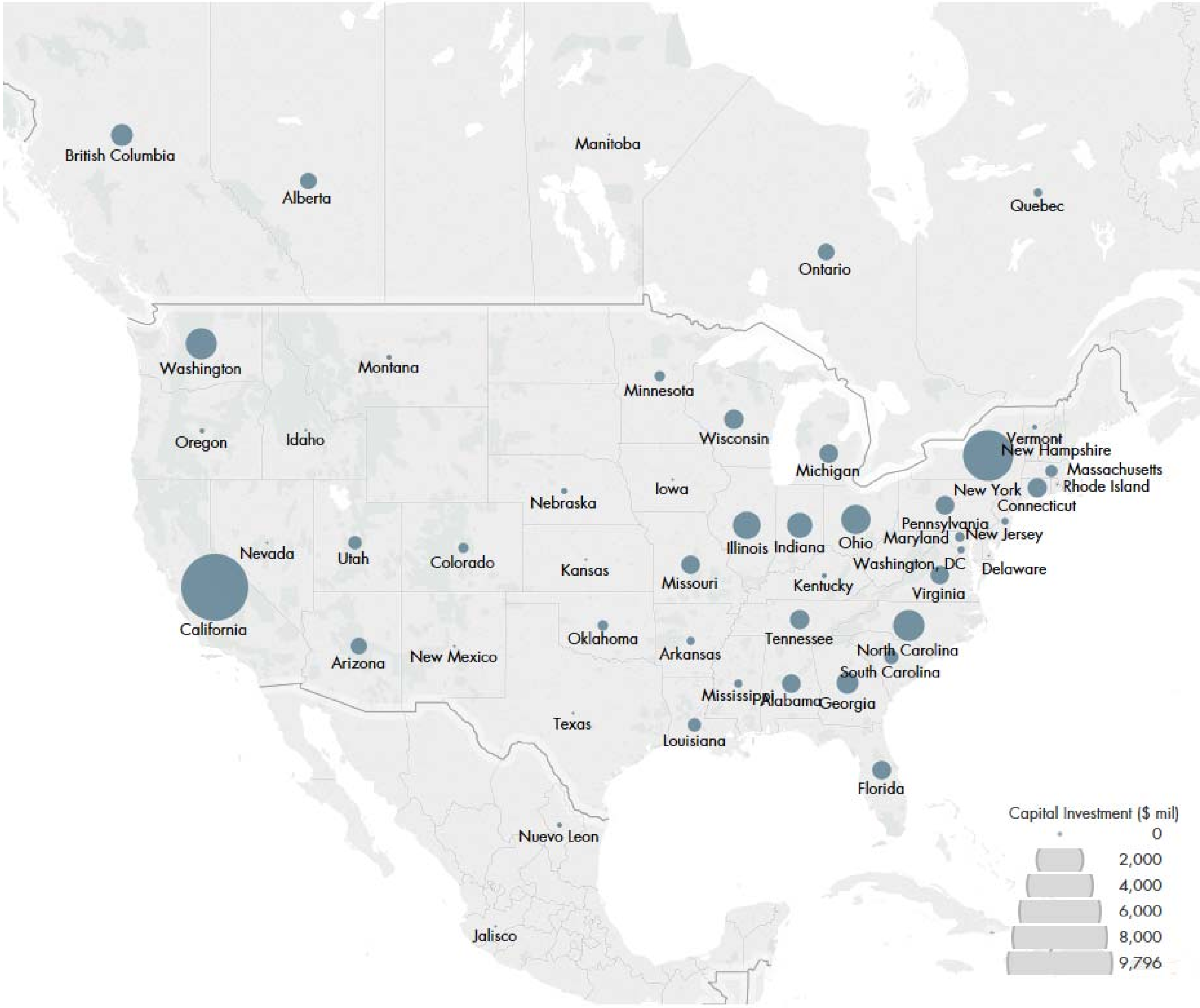
*The Central Texas IH-35 corridor includes 3 counties: Hays, Comal, Guadalupe.

Note: Does not include direct investments by companies headquartered in Texas. For cases where capital investment and job creation were not provided at the time of the announcement, the values shown may be estimated based on similar projects. Travis & Bexar counties excluded for clarity.

Sources: fDi Markets, TIP Strategies

OUT-OF-STATE DIRECT INVESTMENT IN THE CENTRAL TEXAS IH-35 CORRIDOR*

DIRECT INVESTMENT BY COMPANY SINCE 2008

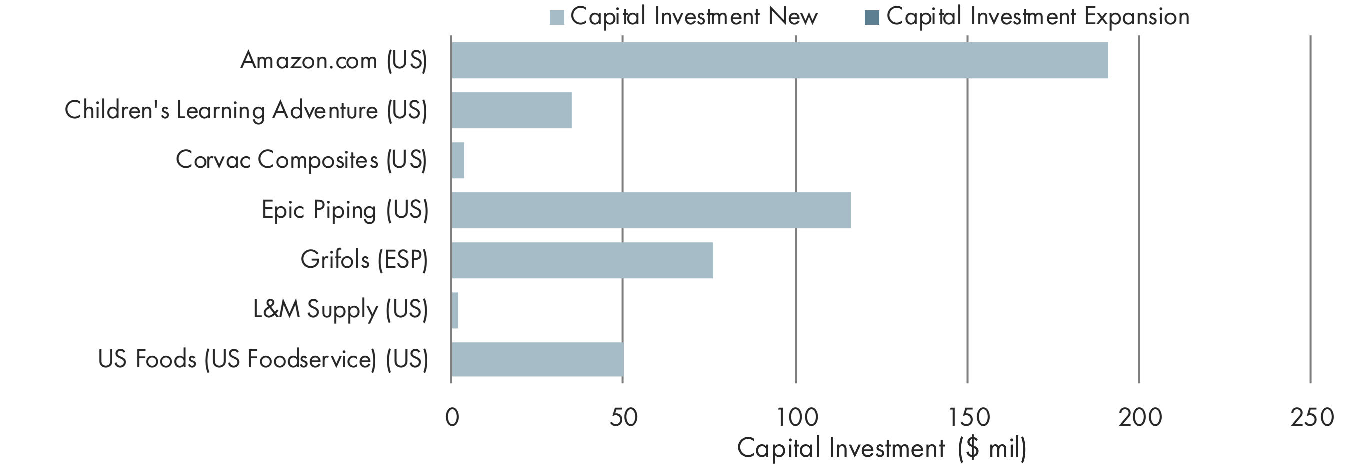


*The Central Texas IH-35 corridor includes 3 counties: Hays, Comal, Guadalupe.

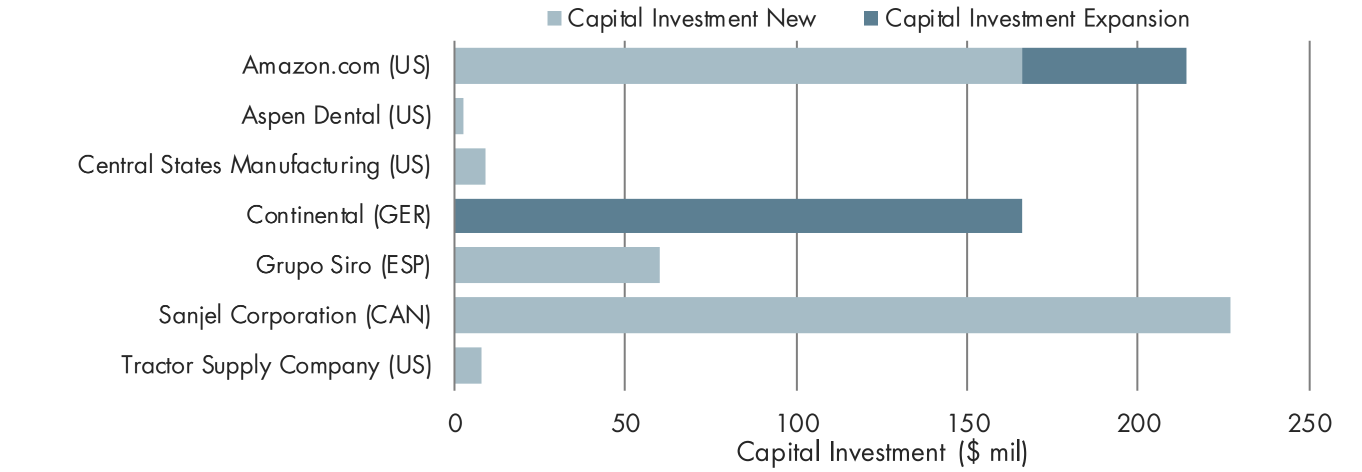
Note: Does not include direct investments by companies headquartered in Texas. For cases where capital investment and job creation were not provided at the time of the announcement, the values shown may be estimated based on similar projects. Travis & Bexar counties excluded for clarity. Not shown: Alaska ($3 mil).

Sources: fDi Markets, TIP Strategies

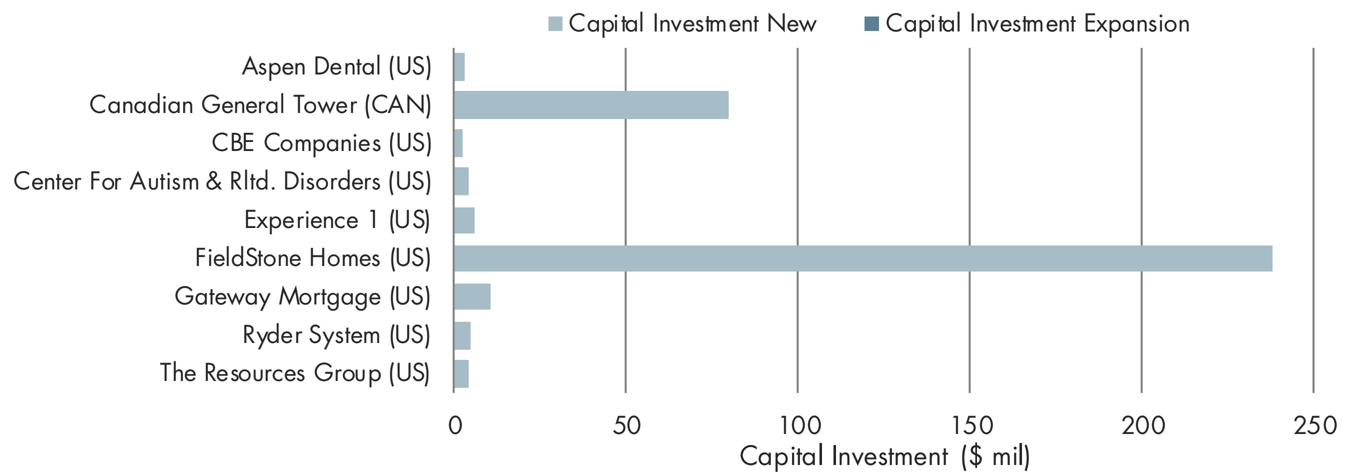
OUT-OF-STATE DIRECT INVESTMENT BY COMPANY IN HAYS COUNTY, SINCE 2008



OUT-OF-STATE DIRECT INVESTMENT BY COMPANY IN GUADALUPE COUNTY, SINCE 2008



OUT-OF-STATE DIRECT INVESTMENT BY COMPANY IN COMAL COUNTY, SINCE 2008

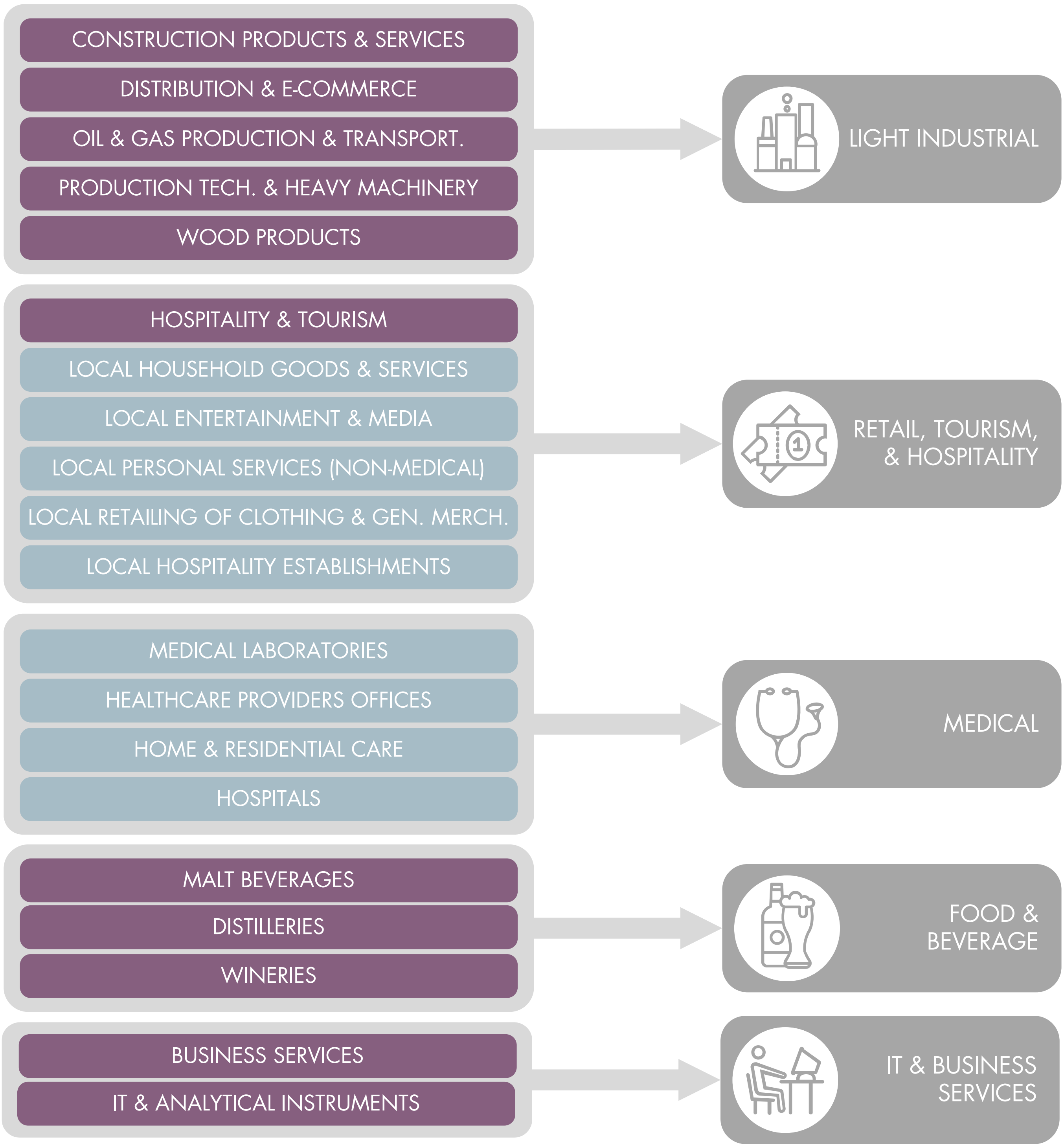


*The Central Texas I-35 corridor includes 3 counties: Hays, Comal, and Guadalupe.
Note: Does not include direct investments by companies headquartered in Texas. For cases where capital investment and job creation were not provided at the time of the announcement, the values shown may be estimated based on similar projects. Travis and Bexar counties excluded for clarity.
Sources: fDi Markets, TIP Strategies.

TARGETING FRAMEWORK

TRADED and **LOCAL** clusters and subclusters emerge from the analysis…

…to provide a foundation for **TARGET SECTORS**



Source(s): US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; and TIP Strategies.

Buda's 2013 economic development strategic plan identified four target industries for the community to focus its marketing and business development efforts.

- Hospitality and tourism
- Office space
- Retail and entertainment
- Light industrial

While the original targets are a good starting point for discussion, TIP's target industry recommendations for Buda are based on a more in-depth analysis of the factors influencing growth opportunities in the city of Buda and the surrounding Austin and San Antonio region. This target industry analysis provides an in-depth understanding of Buda's best opportunities for business growth, using a three-pronged quantitative, qualitative, and strategic approach.

Using TIP's three-phase targeting framework, a set of target industries has been identified for new business creation, expansion, relocation, and recruitment in Buda over the next 10 years. **The recommended target industries for Buda include the following:**

- Light industrial
- Retail, tourism, and hospitality
- Medical
- Food and beverage
- IT and business services

Each of these targets are described in further detail on the following pages. For each target, there is a discussion of the opportunities for business recruitment and investment within the sector, supported by a combination of qualitative and quantitative information. In addition, there is a summary of the market opportunities (regional/national trends and strategic considerations impacting future growth in the industry) and Buda's advantages (local assets and strengths that position the city for growth) for each target industry.

Image Source:

LIGHT INDUSTRIAL

Light industrial is not so much a single industry, but rather, describes a category of companies and sectors that tend to occupy light industrial buildings, including flex space, in a business/industrial park setting. This category includes a high concentration of middle-skill, middle-wage jobs in a range of sectors including: ecommerce and distribution, construction products and services, production technologies, and light manufacturing facilities.

As central portions of Austin continue to experience an influx of investment for the conversion of former light industrial space to high-density mixed-use projects, the cost pressures facing light industrial companies will push these firms to seek new locations outside the urban core. The "industrial gentrification" of Austin is a natural consequence of the city's successful transformation of the downtown district and surrounding neighborhoods into a dynamic urban destination where new development comes primarily in the form of class A office towers, luxury apartment/condo buildings, and high-rise hotels. The existing industrial or "blue collar" companies such as construction contractors, transportation and warehousing operations, and light manufacturing companies can no longer afford to remain and grow in central Austin. This is the story of how many of Buda's largest employers (US Foods, Fat Quarter Shop, and Ampersand Art Supply, among others) ended up in the community.

Buda offers several advantages to light industrial businesses: more affordable real estate than Austin proper, a robust transportation infrastructure network (IH-35 and SH-45, in particular), and a less complicated permitting and development review process than the City of Austin. Buda is especially attractive for light industrial development—even more so than Kyle, San Marcos, and other communities surrounding Austin—because of its close location to central, south, and east Austin. The community's central location within the region allows for light industrial companies to relocate their facilities while retaining their existing workforce.

MARKET OPPORTUNITIES

- Projected job growth of nearly 30 percent in construction products and services and 10 percent in distribution & ecommerce in Austin metro area over next 5 years
- Rapidly growing regional economy in Austin and San Antonio provides opportunities for additional light industrial, warehousing, and manufacturing facilities
- Growing demand for US-made products, along with increased demands on transportation (just-in-time supply chain management) driving growth of domestic manufacturing and light industrial firms

BUDA'S ADVANTAGES

- Proximity to Austin makes it relatively easy for light industrial companies to access their workforce, suppliers, and customers
- Transportation infrastructure (especially IH-35 and SH-45) provides easy access to the surrounding Austin-San Antonio region and beyond for light industrial companies
- More "business-friendly" development review & permitting process than the City of Austin
- Numerous recent business expansion projects (Chip Semiconductor, US Foods, Speed Tech Lights) in the light industrial category

TARGET SNAPSHOT

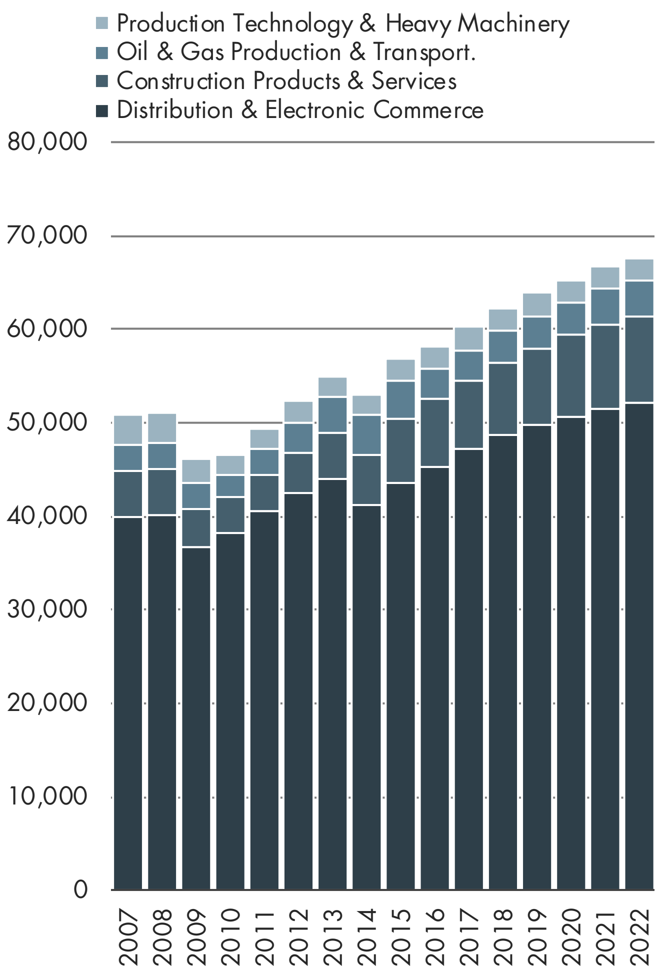
AUSTIN MSA	TOTAL	TARGET
2017 Payrolled Business Locations	57,045	3,478
2017 Employment	1,082,263	60,828
Net Chg., 2007-2017	+237,918	+9,102
Pct. Chg., 2007-2017	+28.2%	+17.6%

EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+614,280
Pct. Chg., 2017-2022	+5.9%	+7.0%
AUSTIN MSA	**TOTAL**	**TARGET**
Net Chg., 2017-2022	+147,404	+7,370
Pct. Chg., 2017-2022	+13.6%	+12.1%

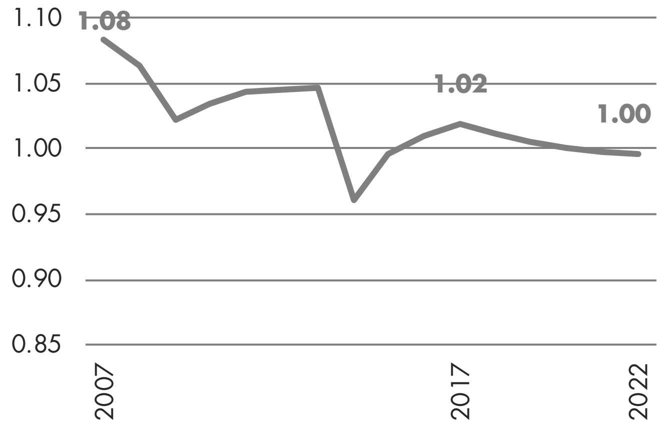
TARGET COMPONENTS

ANNUAL EMPLOYMENT



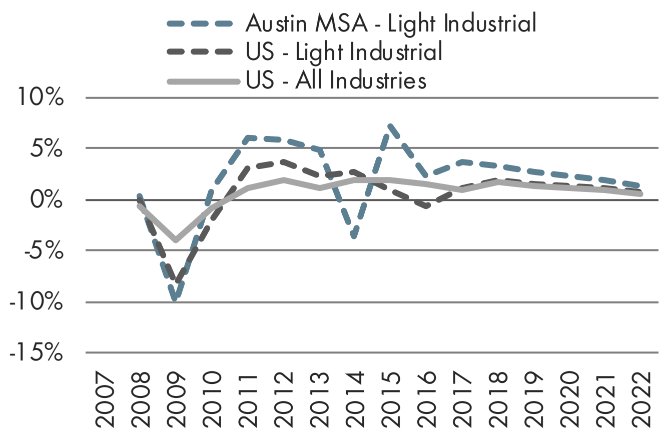
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



KEY FOCUS AREAS

NAICS	DESCRIPTION
211120	Crude Petroleum Extraction
213112	Support Activities for Oil & Gas Operations
237130	Power & Comm. Line & Related Structures Constr.
333249	Other Industrial Machinery Manufacturing
423430	Computer & Peripheral Equip. & Software Merchant Whlslrs.
423610	Electrical Apparatus & Equip., Wiring Supplies, & Related Equip. Merchant Whlslrs.
423690	Other Electronic Parts & Equip. Merchant Whlslrs.
423830	Industrial Machinery & Equip. Merchant Whlslrs.
425120	Wholesale Trade Agents & Brokers
454110	Electronic Shopping & Mail-Order Houses
493110	General Warehousing & Storage
561499	All Other Business Support Services

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.
Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

INDUSTRY INTELLIGENCE

LIGHT INDUSTRIAL		
TRADE ASSOCIATIONS		
Texas Association of Builders		www.texasbuilders.org
International Facilities Management Association (IFMA)		www.ifma.org
Association for Facilities Engineering (AFE)		www.afe.org
Worldwide ERC		www.worldwideerc.org
Texas Relocation Network (TRN)		www.texasrelocationnetwork.org
Construction Industry Institute		www.construction-institute.org
Texas Construction Association		www.texcon.org
American Council of Engineering Companies (ACEC)		www.acec.org
National Electrical Contractors Association (NECA)		www.necanet.org
Associated Builders and Contractors (ABC)		www.abc.org
Associated Builders and Contractors of Texas		www.abctexas.org
Plumbing-Heating-Cooling Contractors Association (PHCC)		www.phccweb.org
Associated Plumbing-Heating-Cooling Contractors of Texas		phcc-tx.site-ym.com
American Society of Plumbing Engineers (ASPE)		www.aspe.org
Building Owners and Managers Association (BOMA)		www.boma.org
Precast Concrete Manufacturers Association (PCMA)		www.pcmatexas.org
RELEVANT CONFERENCES/EVENTS		
NECA 2018		
29 September-October 2 2018	*Philadelphia, PA*	www.necaconvention.org
CONNECT 2018		
10-12 October 2018	*Albuquerque, NM*	www.phccweb.org/connect-2018
METALCON 2018		
10-12 October 2018	*Charlotte, NC*	www.metalcon.com/metalcon18
Facility Fusion 2019		
8-10 April 2019	*Atlanta, GA*	facilityfusion.ifma.org
ACEC Annual Convention & Legislative Summit		
5-8 May 2019	*Washington, DC*	www.acec.org/conferences/annual-convention
BOMA 2019 International Conference & Expo		
22-25 June 2019	*Salt Lake City, UT*	www.bomaconvention.org/BOMA2019
TRADE PUBLICATIONS		
Buildings		www.buildings.com/magazine
Electrical Contractor Magazine		www.ecmag.com
Solutions		www.phccweb.org/solutions
Construtech		constructech.com/magazine
FMJ Magazine		www.ifma.org/publications/fmj-magazine
Infrastructure Magazine		infrastructure.agctx.org/magazine
Texas Merit Shop Journal		www.abctexas.org/pdf/journal_may18.pdf
Engineering Inc.		www.acec.org/publications/engineering-inc

Source(s): TIP Strategies.

RETAIL, TOURISM, AND HOSPITALITY

The retail industry is undergoing a once-in-a-generation disruption (thanks in large part to the growth of ecommerce) affecting traditional department stores and other "big box" retailers. Nonetheless, growing markets like the Austin metro area continue to experience strong demand for new retail stores, restaurants, and hotels due to an expanding population and employment base. Buda is already a significant retail destination, with Cabela's anchoring the city's retail district. The attraction of additional "destination retail" stores—stores like Cabela's or IKEA that draw visitors from a large trade area—is a viable option for Buda. A similar opportunity exists to recruit major entertainment destinations such as Topgolf, Great Wolf Lodge, or Alamo Drafthouse Cinema. Beyond the potential for large-scale retail and entertainment projects, growth in and around Buda will continue to drive demand for a diverse mix of new retailers, restaurants, and hotels, including national chains and locally-owned independent businesses. Future growth of Buda's retail sector is especially important since it directly supports the community's economic development program by funding the Buda EDC, which is a Type B sales tax corporation.

While tourism is not a traditional focus of business recruitment programs, this target can yield direct and indirect benefits. From an economic development standpoint, tourism and associated activities draw in dollars from outside the area, making it an attractive source of revenue. From a workforce perspective, tourism is often seen as a source of low-wage jobs with few benefits and little security. However, this view ignores the important role that tourism can play with regard to talent recruitment. A successful tourism strategy provides a mechanism for introducing new people to an area who might later become residents, establish businesses, or invest in local real estate. Hotel development is another exciting possibility for Buda, especially given the community's frontage on IH-35 and its proximity to Austin-Bergstrom International Airport and the Circuit of the Americas (COTA) racetrack which hosts Formula One (F1) and other major events. A full-service hotel along the IH-35 corridor between South Austin and San Marcos currently does not exist. A full-service hotel could be developed in Buda to fill this gap, along with meeting facilities to accommodate larger groups to draw in additional visitors for trade shows and conferences.

MARKET OPPORTUNITIES

- Additional retail development, including potential for "destination retail" and entertainment venues to serve the entire Austin-San Antonio market
- Potential for additional hotel development, including a large full-service hotel with an on-site conference/convention center
- Ongoing investments in parks (Buda City Park) and destinations (YMCA Camp Cypress, Main Street) will make Buda more attractive to visitors
- Austin's status as a premier visitor destination thanks to major events such as SXSW Interactive, ACL Music Festival, and F1
- Growth of existing events/festivals in Buda and creation of new events that draw in visitors

BUDA'S ADVANTAGES

- Location on IH-35 corridor between Austin and San Antonio
- Rapidly growing local population in Buda and within a 30-minute drive time with high income levels and above average spending power
- Multiple sites with IH-35 frontage large enough for a major new retail/entertainment destination
- Growing cluster of hotels
- Proximity to Austin-Bergstrom International Airport and COTA racetrack complex
- Historic Main Street district with dozens of authentic local businesses
- Buda Mill & Grain development on Main Street

TARGET SNAPSHOT

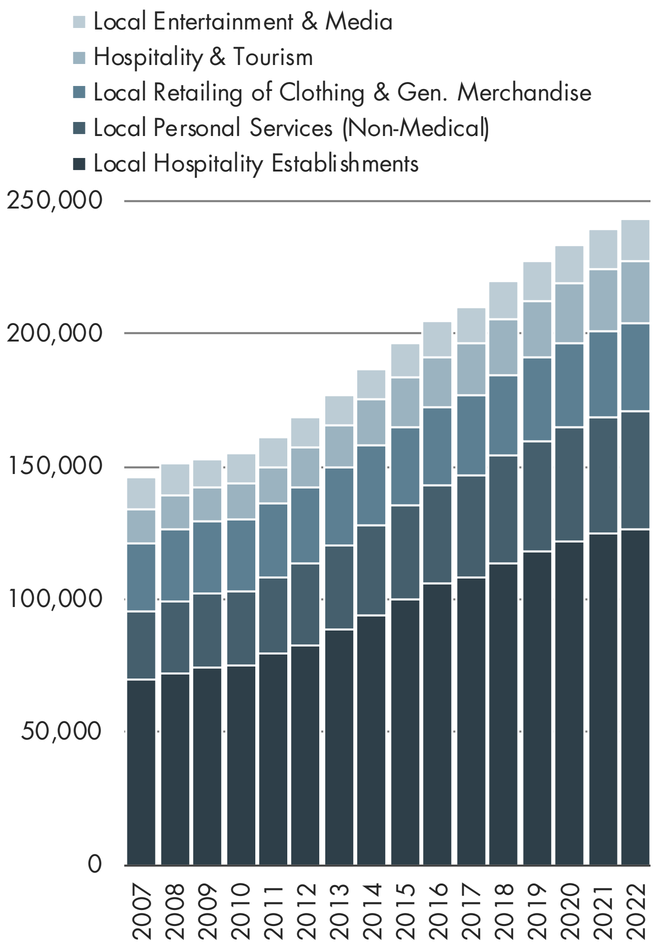
AUSTIN MSA	TOTAL	TARGET
2017 Payrolled Business Locations	57,045	12,277
2017 Employment	1,082,263	210,249
Net Chg., 2007-2017	+237,918	+64,316
Pct. Chg., 2007-2017	+28.2%	+44.1%

EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+1,735,344
Pct. Chg., 2017-2022	+5.9%	+6.2%
AUSTIN MSA	**TOTAL**	**TARGET**
Net Chg., 2017-2022	+147,404	+32,724
Pct. Chg., 2017-2022	+13.6%	+15.6%

TARGET COMPONENTS

ANNUAL EMPLOYMENT

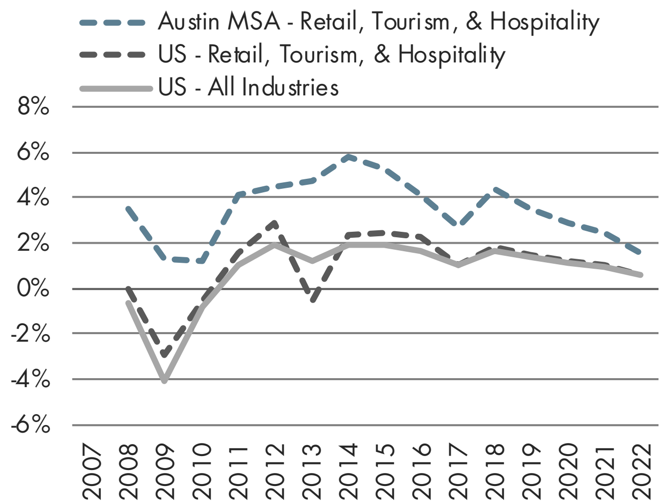


TARGET CONCENTRATION

LOCATION QUOTIENT TREND

TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



KEY FOCUS AREAS

NAICS	DESCRIPTION
451110	Sporting Goods Stores
452311	Warehouse Clubs & Supercenters
611620	Sports & Recreation Instruction
721110	Hotels (except Casino Hotels) & Motels
722511	Full-Service Restaurants
452210	Department Stores

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.
Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

AUSTIN'S LARGEST EVENTS

EVENT	2017 ATTENDANCE	2018 DATES	LOCATION
Austin City Limits Music Festival	450,000	Oct. 5-7 & 12-14	Zilker Park
South by Southwest (SXSW) Conference & Festivals	421,900	March 9-18	Austin Convention Center
Trail of Lights	400,000	December	Zilker Park
Formula 1 United States Grand Prix	269,889*	Oct. 19-21	Circuit of the Americas (COTA)
Rodeo Austin	263,000	March 10-24	Travis County Expo Center
Austin Symphony July 4th Concert & Fireworks	100,000	July 4	Vic Mathias Shores
The Pecan Street Festival	100,000	May 5-6 & Sept. 29-30	6th Street (downtown)
RTX Austin - Animation & Gaming Experience	62,000	Aug. 3-5	Austin Convention Center, JW Marriott, Hilton, Fairmont
Texas Book Festival	50,000	Oct. 27-28	State Capitol and downtown Austin
Armadillo Christmas Bazaar	40,000	Dec. 13-24	Palmer Events Center
East Austin Studio Tour	40,000	Nov. 10-11 & 17-18	Various east Austin locations
Republic of Texas Biker Rally	30,000	June 7 - 10	Travis County Expo Center
Statesman Capitol 10K	21,390	April 8	Austin-American Statesman/Vic Mathias Shores
Bat Fest	20,000	August 18	Ann Richards Congress Ave. Bridge and Austin American Statesman (downtown)
ThunderCloud Subs Turkey Trot	20,000	Thanksgiving Day	The Long Center (downtown)
Moontower Comedy Festival	19,262	April 18-21	Paramount Theatre/downtown
Old Settler's Music Festival	16,000	April 19-22	Tilmon, TX
A Christmas Affair	15,000	Nov. 14-18	Palmer Events Center
Austin Marathon	15,000	Feb. 18	Austin
Austin Film Festival	10,000	Oct. 25-Nov. 1	Various locations
BP MS 150 Bike Marathon	9,000	April 28-29	COTA
Austin Fashion Week	7,500	March 29 – April 7	Various retailers and salons
Classic Game Fest	6,000	July 28-29	Palmer Events Center
Austin Food + Wine Festival	5,000	April 27-29	Auditorium Shores
Eeyore's Birthday Party	5,000	April 27	Pease District Park
ABC Zilker Kite Festival	rained out	March 3	Zilker Park

*Reflects 2016 attendance
Source: Austin Business Journal

INDUSTRY INTELLIGENCE

RETAIL, TOURISM, & HOSPITALITY		
TRADE ASSOCIATIONS		
US Travel Association		www.ustravel.org
American Hotel & Lodging Association (AHLA)		www.ahla.com
Hospitality Financial & Technology Professionals (HFTP)		www.hftp.org
Hospitality Sales and Marketing Association International (HSMAI)		www.hsmai.org
National Restaurant Association		www.restaurant.org
Retail Industry Leaders Association (RILA)		www.rila.org
National Retail Federation (NRF)		nrf.com
International Council of Shopping Centers (ICSC)		www.icsc.org
World Federation of the Sporting Goods Industry (WFSGI)		www.wfsgi.org
National Sporting Goods Association (NSGA)		www.nsga.org
Texas Hotel & Lodging Association		texaslodging.com
Austin Hotel & Lodging Association		www.austinlodging.org
Texas Retailers Association		txretailers.org
Texas Travel Industry Association (TTIA)		www.ttia.org
Texas Association of Fairs & Events (TAFE)		texasfairs.com
International Music & Entertainment Association (IMEA)		imeaonline.com
International Live Events Association (ILEA)		www.ileahub.com
International Festivals & Events Association (IFEA)		www.ifea.com
Event Service Professionals Association (ESPA)		espaonline.org
Themed Entertainment Association (TEA)		www.teaconnect.org
International Association of Exhibitions & Events (IAEE)		www.iaee.com
RELEVANT CONFERENCES/EVENTS		
Texas Travel Summit		
24-26 September 2018	*Galveston Island, TX*	www.ttiasummit.com
63rd Annual IFEA Convention, Expo & Retreat		
1-3 October 2018	*San Diego, CA*	www.ifea.com/p/convention-and-expo/63rdannualconvention
Retail Law Conference 2018		
10-12 October 2018	*Austin, TX*	rila.org/rlaw
Southeast Conference & Deal Making		
23-24 October 2018	*Atlanta, GA*	www.icsc.org/attend-and-learn/events
Research Connections Conference		
28-30 October 2018	*Los Angeles, CA*	www.icsc.org/attend-and-learn/events
Asset Management Symposium		
1 November 2018	*Dallas, TX*	www.icsc.org/attend-and-learn/events
Restaurant Innovation Summit		
7-8 November 2018	*Dallas, TX*	restaurant.org/ris
IAEE Annual Meeting & Convention: Expo! Expo!		
11-13 December 2018	*New Orleans, LA*	www.myexpoexpo.com/expoexpo2018
Red River States Conference & Deal Making (Texas Conference)		
9-11 January 2019	*Fort Worth, TX*	www.icsc.org/attend-and-learn/events
2019 TAFE Convention & Trade Show		
10-13 January 2019	*Galveston, TX*	texasfairs.com/p/327

Continued, next page

INDUSTRY INTELLIGENCE (CONTINUED)

RELEVANT CONFERENCES/EVENTS		
ESPA Annual Conference		
11-13 January 2019	*Charlotte, NC*	espaonline.org/conference
NRF 2019: Retail's Big Show		
13-15 January 2019	*New York City, NY*	nrfbigshow.nrf.com
OAC Summit		
27 February-1 March 2019	*Austin, TX*	www.icsc.org/attend-and-learn/events/details/2018-oac-summit1
2019 Texas Retailers Lobby Day		
20 March 2019	*Austin, TX*	txretailers.org/lobby-day
National Travel & Tourism Week		
5-11 May 2019	*Nationwide, US*	www.ustravel.org/events/national-travel-and-tourism-week
55th Annual NSGA Management Conference & 21st Team Dealer Summit		
19-21 May 2019	*Braselton, GA*	www.nsga.org/events
RECon		
19-22 May 2019	*Las Vegas, NV*	www.icsc.org/attend-and-learn/events/details/2019recon
IPW		
1-5 June 2019	*Anaheim, CA*	www.ipw.com
ESTO (Educational Seminar for Tourism Organizations)		
17-20 August 2019	*Austin, TX*	esto.ustravel.org
TRADE PUBLICATIONS		
Journal of Tourism & Hospitality		www.omicsonline.org/tourism-hospitality.php
InPark Magazine		www.inparkmagazine.com
Food Travel Monitor		www.worldfoodtravel.org/cpages/food-travel-monitor
STORES		stores.org
NGSA NOW		www.nsga.org/news/publications/NSGA_Now
ie Magazine		www.ifea.com/p/resources/iemagazine
Journal of Retailing		www.journals.elsevier.com/journal-of-retailing
International Journal of Event & Festival Management		www.emeraldinsight.com/journal/ijefm

Source(s): TIP Strategies.

MEDICAL

In a very short timeframe, Buda is transitioning from a city with no significant medical institutions to a major destination for medical development in the Austin area. Three new healthcare facilities are currently under construction: a full-service Baylor Scott & White hospital, an Ascension Seton Health Center, and a St. David's HealthCare Emergency Center. Baylor Scott & White is the largest non-profit healthcare system in Texas and this will be its first hospital in Hays County. Collectively, these facilities will bring hundreds of new jobs into the community. They will also provide a much-needed boost to Buda's "daytime population", which is critical for supporting the growth of existing and new retailers and restaurants.

With the development of multiple new medical facilities in Buda, there is an opportunity to brand and promote a "Buda Medical District" centered on the new Baylor Scott & White hospital. In addition to the new medical facilities under construction, the district can also support the development of complementary uses including office space for healthcare providers and professional services firms, new hotels, retail/restaurants, and mixed-use development with residential components. Opportunities for new development and investment in Buda's medical industry include a range of establishments including physicians' offices (general practitioners and specialties), testing laboratories, hospitals, and long-term care facilities. New and expanded partnerships between Austin Community College (Hays Campus), Texas State University, and Hays Consolidated Independent School District (CISD) can help provide a pipeline of local talent to support Buda's growing medical cluster.

MARKET OPPORTUNITIES

- Continued growth of medical industry nationally
- Projected job growth of more than 20 percent in medical industry in Austin metro area over next 5 years
- Potential creation of a "Buda Medical District" centered on the new Baylor Scott & White hospital
- Recruitment and development of medical specialties to serve Buda, South Austin, and Hays County residents
- Emerging role of Austin area as a hub for medical innovation thanks to the Dell Medical School at UT-Austin and newly recruited companies like AthenaHealth and Merck

BUDA'S ADVANTAGES

- New Baylor Scott & White hospital under construction to include full-service hospital functions, primary care, and an integrated multi-specialty medical clinic
- New Ascension Seton Health Center and St. David's HealthCare Emergency Center
- Rapidly growing population in Buda and surrounding portions of South Austin and Hays County will fuel demand for additional medical services
- Relatively low LQs for healthcare employment in Buda (0.35), Hays County (0.64), and Austin metro area (0.73) indicate unmet local and regional demand for medical services
- Texas State University, ACC, and Hays CISD healthcare programs

TARGET SNAPSHOT

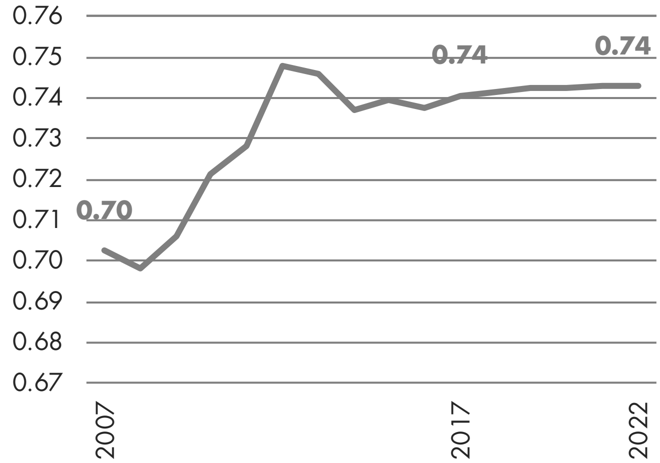
AUSTIN MSA	TOTAL	TARGET
2017 Payrolled Business Locations	57,045	4,113
2017 Employment	1,082,263	84,430
Net Chg., 2007-2017	+237,918	+29,136
Pct. Chg., 2007-2017	+28.2%	+52.7%

EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+1,999,188
Pct. Chg., 2017-2022	+5.9%	+11.9%
AUSTIN MSA	**TOTAL**	**TARGET**
Net Chg., 2017-2022	+147,404	+17,188
Pct. Chg., 2017-2022	+13.6%	+20.4%

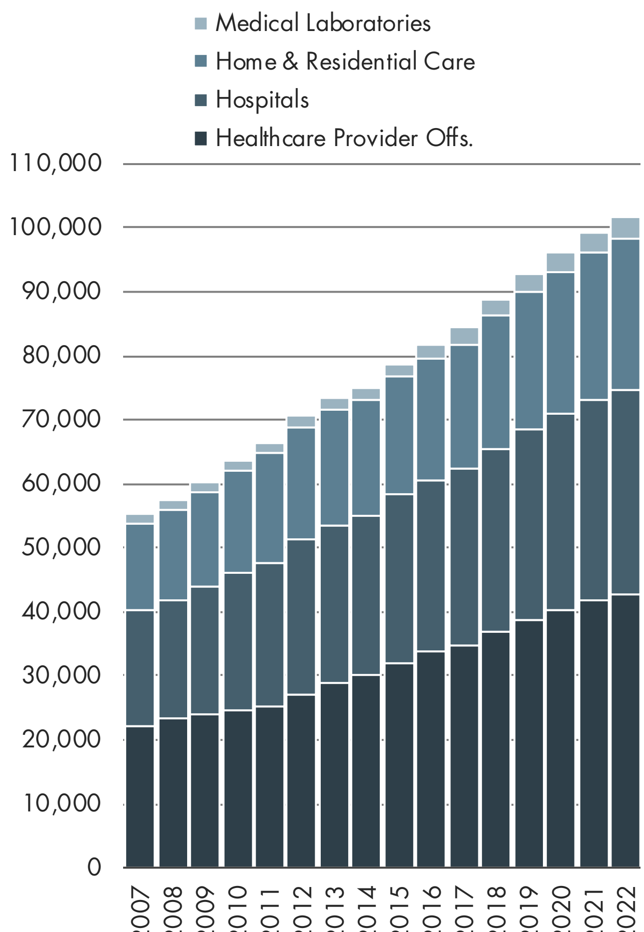
TARGET CONCENTRATION

LOCATION QUOTIENT TREND



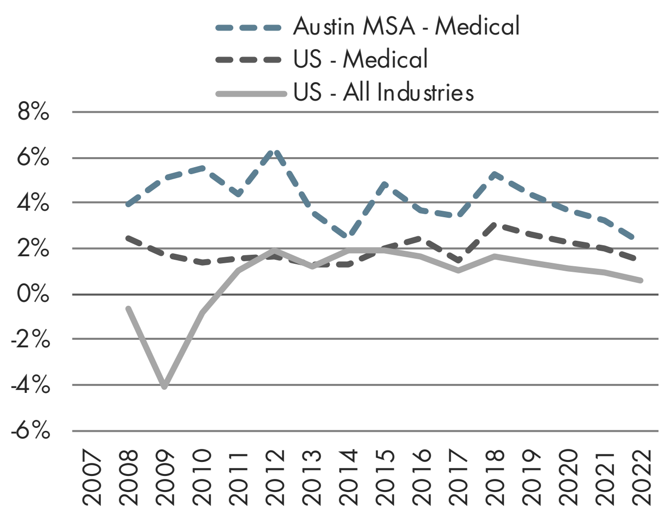
TARGET COMPONENTS

ANNUAL EMPLOYMENT



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT

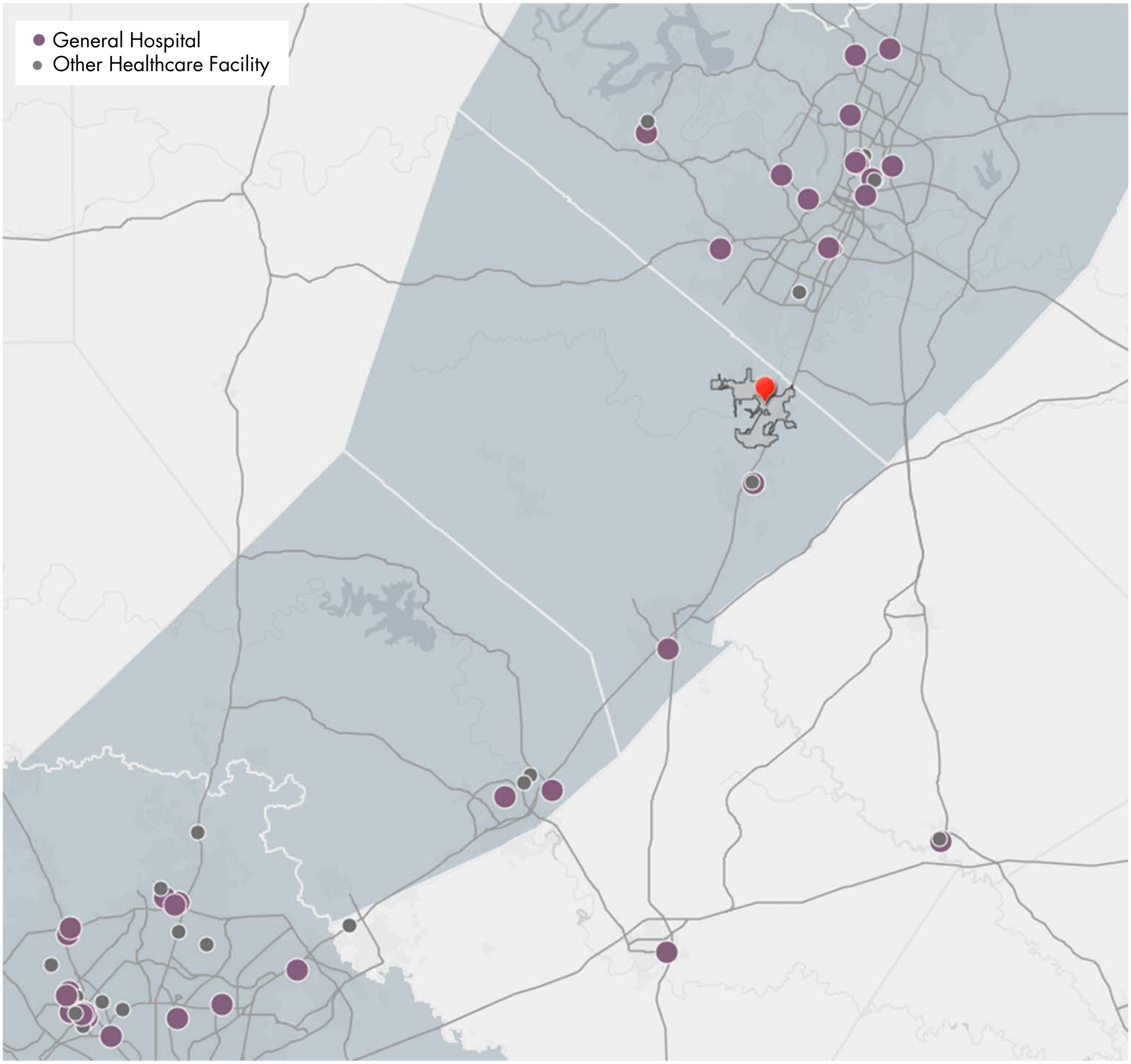


KEY FOCUS AREAS

NAICS	DESCRIPTION
621111	Offs. of Physicians (excl. Mental Health Specialists)
621210	Offices of Dentists
621610	Home Health Care Services
623210	Res. Intellectual & Develop. Disability Facilities
623220	Res. Mental Health & Substance Abuse Facilities
623990	Other Residential Care Facilities
622110	General Medical & Surgical Hospitals
623110	Nursing Care Facilities (Skilled Nursing Facilities)
623312	Assisted Living Facilities for the Elderly

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.
Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

GENERAL HOSPITALS IN THE I-35 CORRIDOR



Source: American Hospital Directory (2104) via Esri Online.

INDUSTRY INTELLIGENCE

MEDICAL		
TRADE ASSOCIATIONS		
American Health Care Association		www.ahcancal.org
American Medical Association		www.ama-assn.org
American Hospital Association (AHA)		www.aha.org
American Board of Medical Specialties (ABMS)		www.abms.org
American Association of Physician Specialists (AAPS)		www.aapsus.org
Southern Medical Association (SMA)		sma.org
Texas Medical Association (TMA)		www.texmed.org
Texas Health Care Association (THCA)		txhca.org
Texas Hospital Association		www.tha.org
Texas Healthcare & Bioscience Institute (THBI)		www.thbi.com
Texas Association of Healthcare Facilities Management (TAHFM)		www.tahfm.org
Texas Association of Community Health Centers (TACHC)		www.tachc.org
RELEVANT CONFERENCES/EVENTS		
ABMS Conference 2018		
24-26 September 2018	*Las Vegas, NV*	www.abms.org/news-events/events
69th Annual AHCA/NCAL Convention & Expo		
7-10 October 2018	*San Diego, CA*	www.eventscribe.com/2018/AHCANCAL
2018 THCA Annual Convention & Trade Show		
29 October-1 November 2018	*Dallas, TX*	txhca.org/2018-thca-annual-convention-trade-show
SMA Annual Scientific Assembly & Special Joint Symposium		
29 October-2 November 2018	*Charleston, SC*	sma.org/education-sma/events/assembly
Interlink 2019		
31 March-3 April 2019	*Houston, TX*	www.tahfm.org/page/2019savethedate
AHA Annual Membership Meeting		
7-10 April 2019	*Washington, DC*	www.aha.org/education-events/aha-annual-membership-meeting-0
AAPS House of Delegates & Annual Scientific Meeting		
21-26 June 2019	*Orlando, FL*	www.aapsus.org/annual-meeting
TRADE PUBLICATIONS		
The American Journal of Medicine		www.amjmed.com
Journal of the American Medical Association		jamanetwork.com/journals/jama/currentissue
Southern Medical Journal		sma.org/smj-home
Texas Hospitals Magazine		www.tha.org/TexasHospitalsMagazine
Texas Family Physician		www.tafp.org/news/tfp
Provider Magazine		www.providermagazine.com

Source(s): TIP Strategies.

FOOD AND BEVERAGE

Buda is home to long-standing food and beverage production companies like Jardine Foods and Night Hawk Frozen Foods, as well as recent additions to the local economy such as Deep Eddy Vodka. Buda is well-positioned to develop and recruit new businesses within the multitrillion-dollar global food and beverage sector. This sector includes activities such as handling, processing, packaging, storage, transportation, and marketing of food and non-food-related agricultural products. The supply chain in the food and beverage industry encompasses a wide array of companies, including suppliers of machinery, seeds, chemicals, tests and vaccines, food processors, and data providers for precision agriculture.

Within the larger food and beverage industry, the craft beverages segment continues to experience rapid growth. Craft beverages include craft breweries, distilleries, and wineries. The opportunity for economic development around craft beverages is to build a legitimate industry cluster beyond the tourism and talent attraction benefits often associated with craft breweries. Innovative approaches to growing industry clusters around craft beverages include target industry marketing campaigns, supply chain recruitment, and workforce development/talent attraction. Asheville has done this with breweries, Kentucky has done it with distilleries, and the Finger Lakes region of Upstate New York is doing it with wineries. The Austin metro area ranks among the top 20 markets in the US for employment growth in breweries since 2010 and has the 6th fastest-growing employment in distilleries in the US.

An opportunity to link the production and tourism aspects of craft beverages with the establishment of a wine-tasting room or similar craft beverage/food shops on Main Street. Communities across the country benefit from downtown wine-tasting shops. Downtown Buda could support multiple tasting rooms/shops that provide bring visitors to Main Street while also promoting greater awareness of area breweries, distilleries, and Hill Country wineries.

MARKET OPPORTUNITIES

- Projected job growth of more than 20 percent in food processing & manufacturing in Austin metro area over next 5 years
- Rapid growth of breweries and distilleries in Austin metro area, with hundreds of new jobs created in each sector since 2010
- Rapidly growing demand for organic and craft food products across the US and globally
- Potential for tasting rooms & boutique food/beverage establishments, especially along Main Street, to promote local breweries, distilleries, wineries, and craft food producers
- Specialty foods (salsas, organic foods) and beverages (craft breweries, distilleries, and wineries)

BUDA'S ADVANTAGES

- Several existing Buda employers in craft foods (Jardine's, Nighthawk Foods) and craft beverages (Deep Eddy Vodka, Two Wheel Brewery)
- Proximity to craft brewery/distillery/winery cluster in Dripping Springs, Driftwood, and surrounding Hill Country communities
- Access to large urban markets with growing demand for organic and natural food products, and craft foods and beverages, including Austin, San Antonio, Houston, and Dallas-Fort Worth
- Transportation infrastructure (especially IH-35 and SH-45) provides easy access to external markets for food and beverage production companies
- Sufficient water/wastewater capacity in Buda to support recruitment of small and mid-size food & beverage companies from surrounding areas

TARGET SNAPSHOT

AUSTIN MSA	TOTAL	TARGET
2017 Payrolled Business Locations	57,045	71
2017 Employment	1,082,263	1,014
Net Chg., 2007-2017	+237,918	+879
Pct. Chg., 2007-2017	+28.2%	+651.5%

EMPLOYMENT OUTLOOK

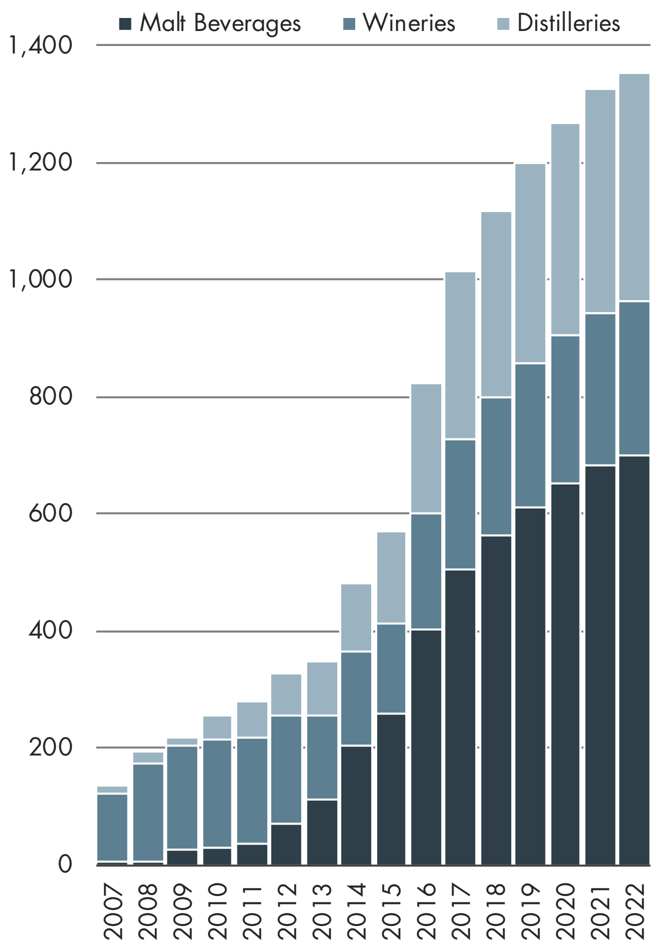
US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+26,126
Pct. Chg., 2017-2022	+5.9%	+17.9%
AUSTIN MSA	**TOTAL**	**TARGET**
Net Chg., 2017-2022	+147,404	+341
Pct. Chg., 2017-2022	+13.6%	+33.6%

TARGET CONCENTRATION

LOCATION QUOTIENT TREND

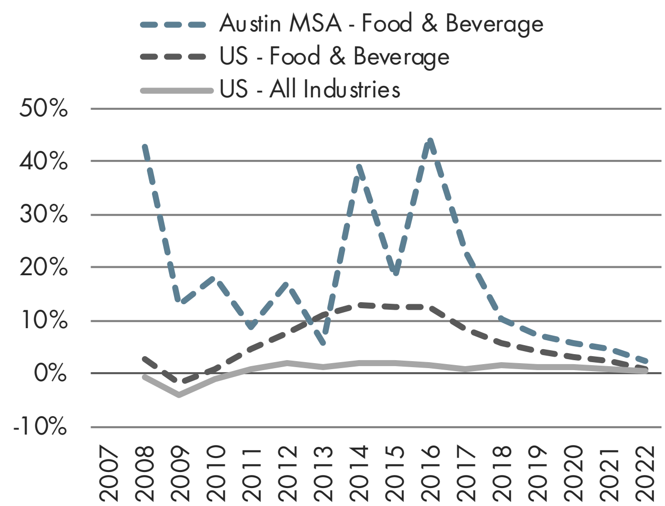
TARGET COMPONENTS

ANNUAL EMPLOYMENT



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



KEY FOCUS AREAS

NAICS	DESCRIPTION
311213	Malt Manufacturing
312120	Breweries
312130	Wineries
312140	Distilleries

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.
Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

TOP 25 METRO AREAS RANKED BY NET CHANGE OF EMPLOYMENT IN BREWERIES, 2010-2017

RANK	METRO AREA	JOBS 2010	JOBS 2017	2010-2017 Net Change	2010-2017 % Change	2017 LQ	2017 Establish-ments
1	San Diego-Carlsbad, CA	335	2,289	1,954	583%	3.13	81
2	Los Angeles-Long Beach-Anaheim, CA	1,137	2,466	1,329	117%	0.84	93
3	Boston-Cambridge-Newton, MA-NH	285	1,583	1,298	455%	1.26	57
4	Chicago-Naperville-Elgin, IL-IN-WI	168	1,449	1,281	764%	0.69	92
5	Minneapolis-St. Paul-Bloomington, MN-WI	123	1,280	1,157	942%	1.43	58
6	Asheville, NC	76	989	913	1205%	10.84	32
7	San Francisco-Oakland-Hayward, CA	105	1,011	906	864%	0.88	43
8	Portland-Vancouver-Hillsboro, OR-WA	226	1,040	814	360%	1.86	84
9	Denver-Aurora-Lakewood, CO	1,960	2,690	730	37%	3.92	104
10	Grand Rapids-Wyoming, MI	14	744	730	5154%	2.90	18
11	Washington-Arlington-Alexandria, DC-VA-MD-WV	81	791	711	883%	0.53	69
12	Seattle-Tacoma-Bellevue, WA	322	1,018	696	216%	1.09	102
13	Detroit-Warren-Dearborn, MI	47	739	692	1472%	0.84	32
14	Charlotte-Concord-Gastonia, NC-SC	150	826	676	449%	1.51	38
15	Indianapolis-Carmel-Anderson, IN	23	697	674	2915%	1.49	34
16	New York-Newark-Jersey City, NY-NJ-PA	668	1,323	655	98%	0.30	78
17	Cincinnati, OH-KY-IN	667	1,225	558	84%	2.53	31
18	Boulder, CO	174	712	538	309%	8.11	32
19	Santa Rosa, CA	94	623	530	566%	6.17	15
20	**Austin-Round Rock, TX**	**30**	**550**	**520**	**1716%**	**1.18**	**32**
21	Houston-The Woodlands-Sugar Land, TX	766	1,275	509	66%	0.92	31
22	Fort Collins, CO	929	1,396	467	50%	18.09	33
23	Bend-Redmond, OR	145	612	467	323%	15.68	15
24	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	163	621	458	281%	0.48	39
25	Allentown-Bethlehem-Easton, PA-NJ	227	652	425	187%	3.93	11

Source: EMSI 2018.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

TOP 25 METRO AREAS RANKED BY NET CHANGE OF EMPLOYMENT IN DISTILLERIES, 2010-2017

RANK	METRO AREA	JOBS 2010	JOBS 2017	2010-2017 Net Change	2010-2017 % Change	2017 LQ	2017 Establish-ments
1	Owensboro, KY	200	679	479	239%	132.64	2
2	Sevierville, TN	26	385	359	1377%	87.30	9
3	Tullahoma-Manchester, TN	351	690	339	97%	176.85	2
4	Bardstown, KY	763	1,060	297	39%	689.41	8
5	Dallas-Fort Worth-Arlington, TX	0	267	267	N/A	0.80	15
6	**Austin-Round Rock, TX**	**44**	**292**	**248**	**568%**	**3.06**	**17**
7	Chicago-Naperville-Elgin, IL-IN-WI	222	434	213	96%	1.02	18
8	Minneapolis-St. Paul-Bloomington, MN-WI	104	311	206	198%	1.71	13
9	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	73	263	190	262%	0.99	13
10	Frankfort, KY	569	737	169	30%	215.06	6
11	Louisville/Jefferson County, KY-IN	1,294	1,453	159	12%	24.04	16
12	Rochester, NY	0	157	157	N/A	3.30	5
13	Seattle-Tacoma-Bellevue, WA	5	162	157	3134%	0.85	29
14	Kansas City, MO-KS	141	283	142	101%	2.84	6
15	Clarksville, TN-KY	0	132	132	N/A	12.22	2
16	Denver-Aurora-Lakewood, CO	16	140	124	788%	1.00	17
17	Riverside-San Bernardino-Ontario, CA	0	121	121	N/A	0.84	1
18	New York-Newark-Jersey City, NY-NJ-PA	354	461	107	30%	0.52	26
19	Portland-Vancouver-Hillsboro, OR-WA	29	127	99	344%	1.12	14
20	Nashville-Davidson–Murfreesboro–Franklin, TN	0	92	92	N/A	1.01	8
21	Washington-Arlington-Alexandria, DC-VA-MD-WV	5	92	87	1740%	0.30	22
22	Los Angeles-Long Beach-Anaheim, CA	18	96	78	434%	0.16	7
23	Niles-Benton Harbor, MI	0	76	76	N/A	12.59	1
24	Indianapolis-Carmel-Anderson, IN	0	73	73	N/A	0.77	3
25	Miami-Fort Lauderdale-West Palm Beach, FL	5	78	73	1451%	0.31	5

Source: EMSI 2018.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

INDUSTRY INTELLIGENCE

FOOD & BEVERAGE		
TRADE ASSOCIATIONS		
Grocery Manufacturers Association		www.gmaonline.org
American Beverage Association		www.ameribev.org
Specialty Food Association		www.specialtyfood.com
Distilled Spirits Council		www.distilledspirits.org
American Institute of Wine & Food (AIWF)		www.aiwf.org
Wine & Spirits Wholesalers of America (WSWA)		www.wswa.org
Brewers Association		www.brewersassociation.org
Master Brewers Association of the Americas (MBAA)		www.mbaa.com
Texas Craft Brewers Guild		texascraftbrewersguild.org
Texas Food Processors Association		www.tfpa.org
The Beer Alliance of Texas		www.beeralliance.com
RELEVANT CONFERENCES/EVENTS		
NOSH Live Winter 2018		
29-30 November 2018	*Santa Monica, CA*	www.projectnosh.com/events/noshlivewinter18
BevNET Live Winter 2018		
3-4 December 2018	*Santa Monica, CA*	www.bevnet.com/events/bevnetlivewinter18
Beverage Digest Future Smarts		
7 December 2018	*New York City, NY*	www.zenithglobal.com/events/234/Beverage Digest Future Smarts
Winter Fancy Food Show		
13-15 January 2019	*San Francisco, CA*	www.specialtyfood.com/shows-events/winter-fancy-food-show
GMA Science Forum		
26-27 March 2019	*Washington, DC*	www.gmaonline.org/forms/meeting/Microsite/scienceforum19
ProFood Tech		
26-28 March 2019	*Chicago, IL*	www.profoodtech.com
WSWA 76th Annual Convention & Exposition		
31 March-3 April 2019	*Orlando, FL*	www.wswaconvention.org
2019 TFPA Annual Conference		
15-17 May 2019	*San Antonio, TX*	www.tfpa.org/newsevents/news-events-3
TRADE PUBLICATIONS		
Beverage Industry Magazine		www.bevindustry.com
Beverage Digest		www.beverage-digest.com
Technical Quarterly		www.mbaa.com/publications/tq/Pages/default.aspx
Specialty Food Magazine		www.specialtyfood.com/digital-edition
Journal of Food Processing & Preservation		onlinelibrary.wiley.com/journal/17454549

Source(s): TIP Strategies.

IT AND BUSINESS SERVICES

Austin is no longer a small outpost in the tech and corporate world. The metro area has emerged as one of the premier technology hubs in the US. Two decades ago, a reliance on tech companies for economic growth was widely viewed as a risk. The Dot-Com bubble and subsequent bust in the late 1990s and early 2000s supported this view, with significant job losses in tech hubs like Austin and Silicon Valley. However, the US economy has changed in important ways over the last 15 years. Tech is no longer an isolated industry. IT and software are critical underpinnings for virtually all industries. During the recent Great Recession, Austin and Silicon Valley lost fewer jobs than during the previous recession, despite much steeper job losses throughout the US as a whole. The stronger economic performance of tech hubs in comparison with other metro areas during and after the recent recession is an indication of the increasing role that innovation and technologically-skilled workers now play in the success of the overall economy.

The Austin metro area is home to 93 companies listed on the Inc. 5000, a national ranking of the fastest-growing private companies. The ranking is similar to the Fortune 500 (which ranks corporations based on annual revenue) with two distinctions: (1) it ranks firms by year-over-year revenue growth; and (2) it only includes privately held firms, not publicly held corporations. These companies span a broad range of industries from software to food and beverages, but the majority can be defined as “tech companies” given their focus on technology solutions and innovations. Of the 93 Austin area Inc. 5000 firms, 81 are located in Austin and the remaining 12 firms are in suburban communities surrounding Austin. Only two are located in Hays County, both in Dripping Springs. Nearly 75 percent of these firms are less than a dozen years old, making them an easier target for expansion compared to companies with long-standing roots in their home base.

Given Buda’s central location in the Austin metro area, the community is well-positioned to capitalize on the region’s growing IT and business services cluster. A promising recent trend of the Austin area shows tech companies establishing dual offices in downtown Austin and in the region’s “second downtown” centered on The Domain development in far North Austin (Indeed, HomeAway, Facebook). This is a sign that IT and business services firms are spreading out their footprint to better access the region’s workforce. Another opportunity is the relocation of State of Texas office complexes to privately owned office campuses in Buda, away from expensive central Austin real estate.

MARKET OPPORTUNITIES

- High concentrations of employment in IT and analytical instruments (LQ of 3.65) and business services (1.42) in Austin metro area
- Projected job growth of 18 percent in IT & business services in Austin metro area over next 5 years
- 93 Inc. 5000 firms based in Austin metro area (none in Buda and only 2 in Hays County)
- Long-term potential for a regional corporate & tech hub at the IH-35 and SH-45 highway interchange
- State of Texas offices located in expensive urban core locations could relocate to Buda

BUDA’S ADVANTAGES

- Relatively affordable real estate compared to central Austin
- Access to Austin-Bergstrom International Airport
- Access to a large, rapidly growing skilled workforce within a 45-minute drive time of Buda
- Texas State University’s ongoing investments in new STEM (science, technology, engineering, and math) programs and its recent designation as an Emerging Research University

TARGET SNAPSHOT

AUSTIN MSA	TOTAL	TARGET
2017 Payrolled Business Locations	57,045	7,463
2017 Employment	1,082,263	121,399
Net Chg., 2007-2017	+237,918	+35,919
Pct. Chg., 2007-2017	+28.2%	+42.0%

EMPLOYMENT OUTLOOK

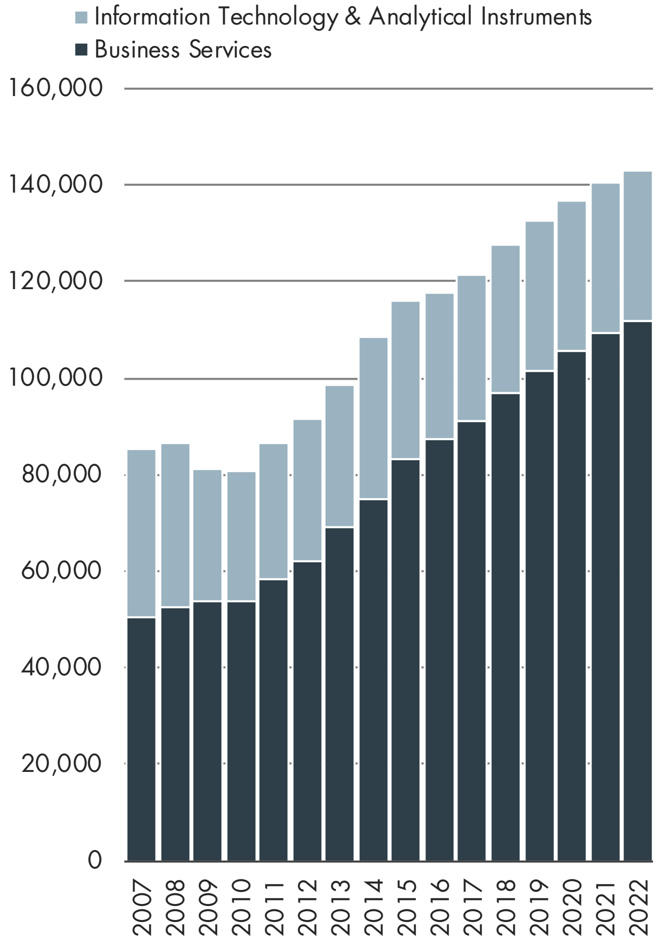
US OVERALL	TOTAL	TARGET
Net Chg., 2017-2022	+9,474,185	+1,034,933
Pct. Chg., 2017-2022	+5.9%	+9.6%
AUSTIN MSA	**TOTAL**	**TARGET**
Net Chg., 2017-2022	+147,404	+21,634
Pct. Chg., 2017-2022	+13.6%	+17.8%

TARGET CONCENTRATION

LOCATION QUOTIENT TREND

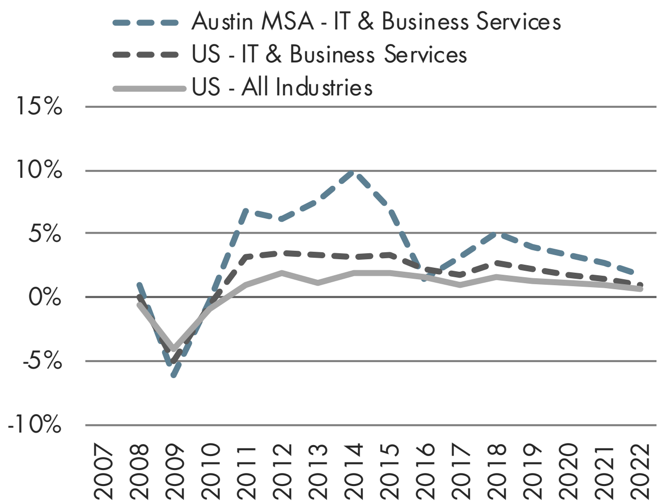
TARGET COMPONENTS

ANNUAL EMPLOYMENT



TARGET GROWTH

ANNUAL % CHANGE IN EMPLOYMENT



KEY FOCUS AREAS

NAICS	DESCRIPTION
334111	Electronic Computer Manufacturing
334413	Semiconductor & Related Device Manufacturing
511210	Software Publishers
541511	Custom Computer Programming Services
541512	Computer Systems Design Services
551114	Corp., Subsidiary, & Region. Managing Offices
561422	Telemarketing Bureaus & Other Contact Centers

Source(s): US Bureau of Labor Statistics; EMSI 2018.2 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies.
Note(s): The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies to align with the 6-digit NAICS classifications used by EMSI.

INC. 5000 FIRMS LOCATED IN THE AUSTIN METRO AREA, 2018

Rank	Company	3-Yr. Revenue Growth	2016 Revenue ($M)	Industry	Location	Year Founded	Work-force Size
138	Favor	2917%	$29.2	Logistics & Transportation	Austin	2013	136
140	Student Loan Hero	2916%	$11.2	Financial Services	Austin	2012	25-49
207	Wells Solar	2205%	$9.6	Energy	Austin	2014	41
233	Axzon	2040%	$4.4	IT System Development	Austin	2006	20
287	Maggie Louise Confections	1703%	$2.2	Food & Beverage	Austin	2014	43
358	Texas Beauty Labs	1411%	$6.8	Consumer Products & Serv.	Austin	2007	85
390	HookBang	1264%	$2.9	Software	Austin	2012	17
414	Simple Booth	1210%	$3.3	Business Products & Serv.	Austin	2013	23
472	June & January	1070%	$3.7	Retail	Georgetown	2011	13
582	The Cobalt Companies	860%	$4.7	Construction	Austin	2002	3
801	Under30Experiences	627%	$2.5	Travel & Hospitality	Austin	2012	18
814	MKS2	620%	$5.4	Government Services	Austin	2008	60
906	Flux7	547%	$3.3	IT System Development	Austin	2013	40
997	Proximity Learning	494%	$5-10	Education	Austin	2009	150
1026	Capstone Tile	479%	$2.8	Real Estate	Austin	2013	20
1058	Jacaruso Enterprises	465%	$7.6	Travel & Hospitality	Round Rock	2008	11
1094	Pathway Vet Alliance	450%	$160.1	Health	Austin	2003	2,700
1105	Aptitude Media	447%	$6.2	Advertising & Marketing	Austin	2014	6
1158	Threshold/Carve	423%	$5.8	Advertising & Marketing	Austin	2013	22
1206	Flix Brewhouse	401%	$34.6	Food & Beverage	Round Rock	2011	686
1207	NurturMe	400%	$3.1	Food & Beverage	Dripping Springs	2011	10
1223	Camp Gladiator	395%	$42.2	Consumer Products & Serv.	Austin	2008	75
1334	ReviewPush	361%	$2.1	Software	Austin	2011	10
1373	Becker Wright Consultants	344%	$3.4	Human Resources	Austin	2003	23
1406	Texan Allergy Sinus Center	337%	$18.9	Health	Austin	2013	137
1479	Local Web Leads	317%	$6.4	Advertising & Marketing	Austin	2013	12
1593	Growth Institute	293%	$2.1	Education	Austin	2012	13
1624	Fifteen Five	285%	$7.3	Business Products & Serv.	Leander	2010	254
1670	F&S By Farrah	275%	$2.1	Consumer Products & Serv.	Austin	2010	9
1746	Capitol Home Health	260%	$19.0	Health	Austin	1998	35
1788	The ASK Method Company	252%	$6.3	Education	Georgetown	2009	37
1795	9Gauge Partners	251%	$7.7	Financial Services	Austin	2011	44
1835	Status Labs	245%	$10.4	Advertising & Marketing	Austin	2012	40
860	Pioneer Bank	241%	$47.8	Financial Services	Austin	2007	236
1873	Patriot Pool and Spa	240%	$2.5	Consumer Products & Serv.	Austin	2006	26
1885	Praetorian	237%	$9.5	Security	Austin	2010	25-49
2023	Netgate	221%	$12.5	Software	Austin	2004	42
2058	ESO Solutions	217%	$21.4	Software	Austin	2004	133
2140	AustinRealEstate.com	208%	$4.1	Real Estate	Austin	2007	36
2184	Jackrabbit Mobile	203%	$2.8	Business Products & Serv.	Austin	2012	28
2219	Higher State Technology	199%	$2.2	IT Management	Round Rock	2004	20
2244	AMMD	196%	$6.4	Health	Bee Cave	2010	20
2261	Square Cow Moovers	195%	$13.7	Logistics & Transportation	Austin	2008	268
2284	Service Direct	192%	$5.1	Advertising & Marketing	Austin	2006	18
2348	Culhane Premier Properties	185%	$4.5	Real Estate	Cedar Park	2011	35
2453	AffiniPay	176%	$35.6	Financial Services	Austin	2005	103
2470	Busch Global	175%	$13.0	Business Products & Serv.	Austin	2012	250
2499	EBQuickstart	172%	$12.8	Business Products & Serv.	Austin	2006	178
2529	ProEquity Asset Management	169%	$3.2	Real Estate	Austin	2011	28
2534	Bilt Rite Scaffold	169%	$6.8	Construction	Austin	2006	80

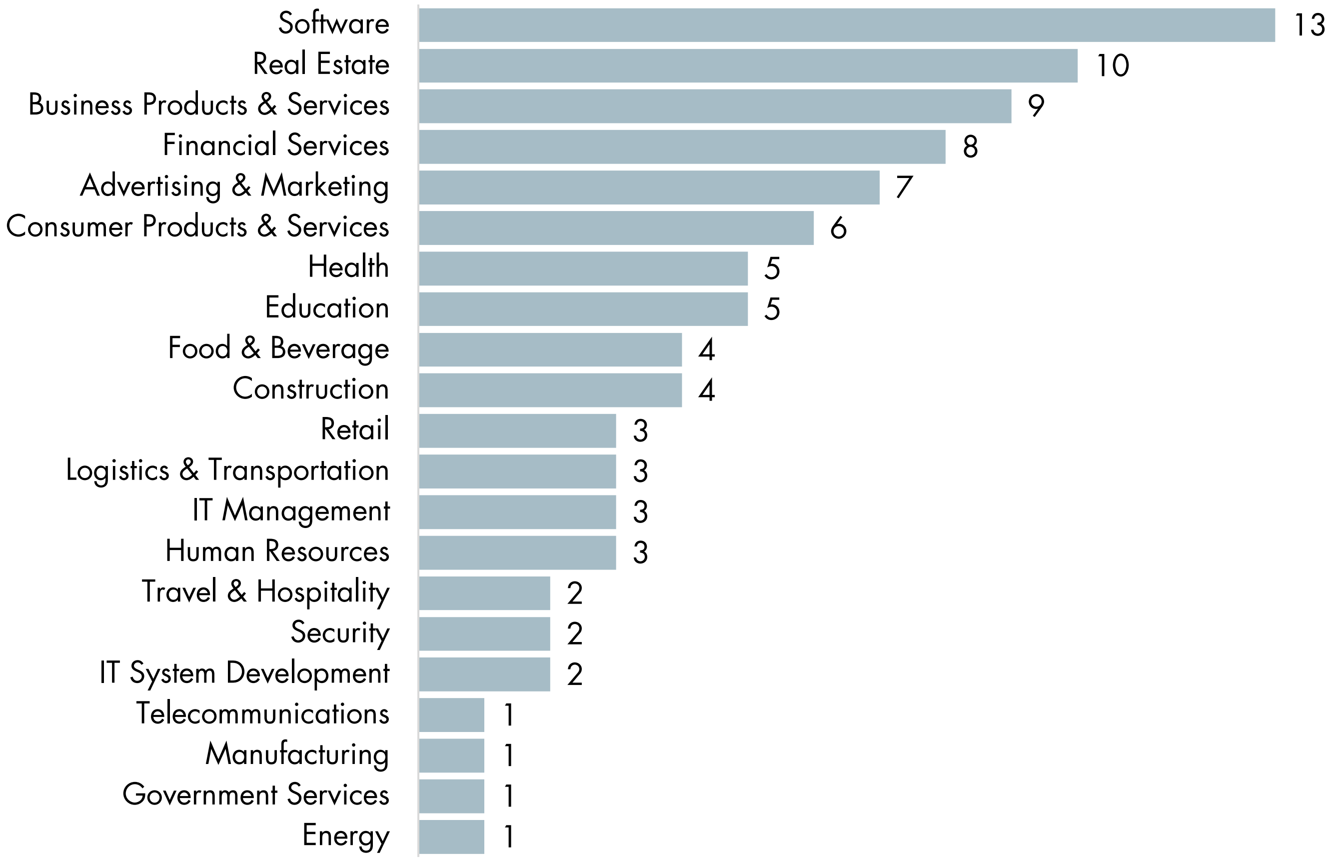
Continued, next page.

INC. 5000 FIRMS LOCATED IN THE AUSTIN METRO AREA, 2018 (CONTINUED)

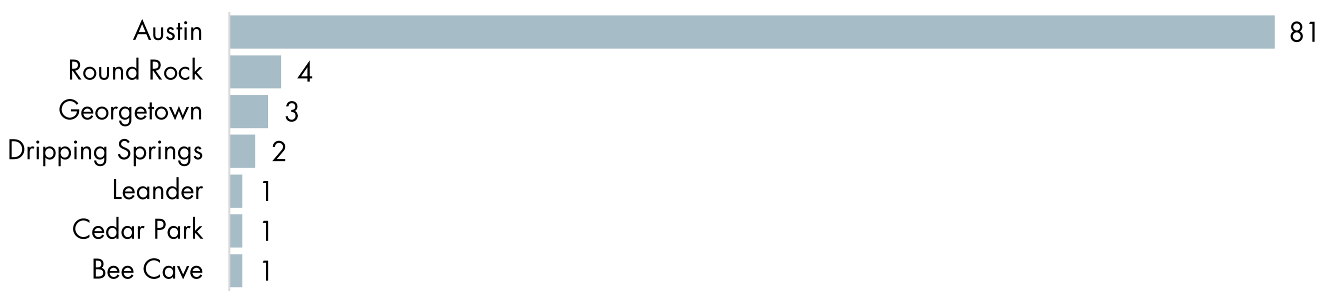
Rank	Company	3-Yr. Revenue Growth	2016 Revenue ($M)	Industry	Location	Year Founded	Work-Force Size
2558	HumanN	167%	$35.9	Health	Austin	2010	25-49
2562	Momentum Factor	166%	$3.3	Software	Austin	2009	13
2570	Erben Associates	166%	$4.3	Financial Services	Austin	1993	10
2596	ECR I Equitable Commercial Realty	164%	$5.7	Real Estate	Austin	2010	22
2606	INK Communications	163%	$4.9	Advertising & Marketing	Austin	2004	33
2665	Open Lending	158%	$32.5	Financial Services	Austin	2000	46
2863	Mission Critical Facilities	144%	$13.0	IT Management	Austin	2010	14
2871	Einstein Moving Company	143%	$4.5	Logistics & Transportation	Austin	2012	110
3031	HomeCity Real Estate	133%	$15.2	Real Estate	Austin	2001	172
3032	Talroo	133%	$55.5	Human Resources	Austin	2010	86
3068	The Hay Legal Group PLLC	131%	$5.3	Business Products & Serv.	Austin	2010	28
3078	Agile Velocity	130%	$6.3	Business Products & Serv.	Austin	2010	15
3123	Retail Solutions (Austin, Texas)	127%	$8.5	Real Estate	Austin	2009	84
3193	Interplay Learning	123%	$2.1	Education	Austin	2011	19
3203	SecureLink	123%	$10.8	Software	Austin	2003	41
3228	Kidd Roofing	122%	$38.8	Construction	Austin	1982	50
3289	Austin Capital Bank	119%	$7.0	Financial Services	Austin	2006	17
3308	The Heyl Group at Keller Williams	118%	$4.0	Real Estate	Austin	2010	8
3403	The Gober Group	113%	$2.3	Business Products & Serv.	Austin	2011	8
3437	Peddle	111%	$65.6	Consumer Products & Serv.	Austin	2011	50-99
3441	SourceMatch	111%	$2.1	Human Resources	Austin	1994	23
3445	Workhorse Marketing	111%	$2.6	Advertising & Marketing	Austin	2003	17
3599	SKG	104%	$31.4	Real Estate	Austin	1997	48
3607	Praxent	103%	$5.2	Software	Austin	2000	17
3611	Zinda Law Group, PLLC	103%	$8.6	Business Products & Serv.	Austin	2008	52
3834	NSS Labs	94%	$20.2	Security	Austin	2007	90
3868	Georgetown Mortgage	92%	$884.2	Financial Services	Georgetown	2001	329
3866	Whim Hospitality	92%	$10.6	Food & Beverage	Dripping Springs	2012	180
4048	Alpha Paving Industries	87%	$16.1	Construction	Round Rock	2012	60
4056	KBMax	86%	$2.3	Software	Austin	2009	25
4110	Optizmo Technologies	85%	$3.0	Software	Austin	2009	14
4113	MeetEdgar	84%	$3.8	Software	Austin	2014	24
4190	Urban Betty	82%	$2.6	Retail	Austin	2005	41
4428	Watters International Realty	74%	$4.3	Real Estate	Austin	2010	45
4441	CyberTex	74%	$5.6	Education	Austin	1999	50
4475	milk + honey	73%	$16.3	Consumer Products & Serv.	Austin	2006	350
4511	MyITpros	72%	$5.7	IT Management	Austin	1993	38
4549	TengoInternet	71%	$8.8	Telecommunications	Austin	2002	36
4597	Hayes Software Systems	70%	$9.6	Software	Austin	1990	46
4604	VirTex Enterprises	70%	$69.2	Manufacturing	Austin	1999	237
4618	Antonelli's Cheese Shop	69%	$2.4	Retail	Austin	2010	21
4666	Magnitude Software	67%	$61.5	Software	Austin	2014	412
4732	Clear Measure	65%	$6.2	Software	Austin	2013	33

Source: Inc. 5000

INC. 5000 FIRMS IN AUSTIN METRO AREA BY INDUSTRY, 2018



NUMBER OF INC. 5000 FIRMS IN AUSTIN METRO AREA BY CITY, 2018



Source: Inc. 5000

INDUSTRY INTELLIGENCE

IT & BUSINESS SERVICES		
TRADE ASSOCIATIONS		
Texas Association of Business (TAB)	www.txbiz.org	
American Bar Association	www.americanbar.org	
Institute of Management Consultants USA	www.imcusa.org	
American Management Association	www.amanet.org	
American Marketing Association (AMA)	www.ama.org	
Society for Marketing Professional Services (SMPS)	www.smps.org	
American Financial Services Association (AFSA)	www.afsaonline.org	
Association for Financial Professionals (AFP)	www.afponline.org	
American Insurance Association (AIA)	www.aiadc.org	
CompTIA	www.comptia.org	
Association of Information Technology Professionals (AITP)	www.aitp.org	
IEEE	www.ieee.org	
Information Technology Industry Council	www.itic.org	
National Association of Corporate Directors (NACD)	www.nacdonline.org	
Association for Corporate Growth (ACG)	www.acg.org	
Association of Software Professionals (ASP)	asp-software.org	
RELEVANT CONFERENCES/EVENTS		
Consult-Con		
5-7 October 2018	*San Diego, CA*	imcusaconference.org
2018 CompTIA Tech Summit		
17-18 October 2018	*National Harbor, MD*	www.comptia.org/events/view/2018-comptia-state-tech-summit
AFP 2018		
4-7 November 2018	*Chicago, IL*	conference.afponline.org
International Conference for High Performance Computing (SC18)		
11-16 November 2018	*Dallas, TX*	sc18.supercomputing.org
CompTIA AITP TechTurnout Central		
14 November 2018	*Dallas, TX*	www.comptia.org/events/view/comptia-aitp-techturnout-central
2019 TAB Annual Meeting & Policy Conference		
7 February 2019	*Austin, TX*	www.txbiz.org/events
2019 AMA Winter Academic Conference		
22-24 February 2019	*Austin, TX*	www.ama.org/events-training/Conferences/
TRADE PUBLICATIONS		
Wall Street Journal	www.wsj.com	
Marketer	www.smps.org/resourcesmarketer	
Journal of Marketing	www.ama.org/publications/JournalOfMarketing/Pages/Current-Issue.aspx	
Consulting	www.consultingmag.com	
CompTIAWorld Magazine	www.comptia.org/about-us/newsroom/comptiaworld-magazine	
Exchange	www.afponline.org/publications-data-tools/publications/afp-exchange-magazine	
Business Process Management Journal	www.emeraldgrouppublishing.com/bpmj.htm	

Source(s): TIP Strategies.