Frisco Development Update
Park Cities Club Breakfast Group
February 6, 2019
DFW International Airport
4th busiest in the world

All major cities in the continental U.S. are within a 4.5 hour flight time

244 destinations, 182 domestic and 62 international

Frisco Is Centrally Located

DALLAS

25 miles north of downtown Dallas with easy access to interstates and major highways.
Frisco is approx. 20 miles from DFW Intl Airport & Dallas Love Field.
## Facts & Stats

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Land square miles</td>
<td>70.2</td>
</tr>
<tr>
<td>Land Developed</td>
<td>73%</td>
</tr>
<tr>
<td>Population (01.01.2019)</td>
<td>183,173</td>
</tr>
<tr>
<td>Population 2000 Census</td>
<td>33,714</td>
</tr>
<tr>
<td>Population Growth (2000 – 2019)</td>
<td>443%</td>
</tr>
<tr>
<td>Population Build Out</td>
<td>297,800+</td>
</tr>
</tbody>
</table>
Population Growth

2,884%
1990 to 2019

5.2%
10-year compound growth rate

10,500
New residents in 2018

FRISCO POPULATION

YEAR

FRISCO, TEXAS
## Residential Demographics

<p>| | |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Median Age</td>
<td>36.6 yrs.</td>
</tr>
<tr>
<td>Total Households</td>
<td>63,988</td>
</tr>
<tr>
<td>Households w/ Children 17 &amp; Younger</td>
<td>31.4%</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$122,302</td>
</tr>
<tr>
<td>Median Single-Family Home Value</td>
<td>$397,719</td>
</tr>
<tr>
<td>Median Monthly Mortgage</td>
<td>$2,198</td>
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</table>
Public and Private Schools

- **Public Schools**: Four school districts (Frisco ISD, Little Elm ISD, Prosper ISD, Lewisville ISD)
  - Frisco Independent School District – largest of the four ISDs within the City of Frisco
    - Small-school model
    - Voters approved a $691 million construction bond, as well as a Tax Ratification Election (TRE) in Nov. 2018.
    - $775 million bond election passed w/ 77% voter approval in 2014
    - Career Technology Education (CTE) Center – jump start on career path

- **Private School**: Legacy Christian Academy

- **Charter Schools**: Leadership Prep School, Founders Classical (2018)
Frisco Independent School

District Stats

<table>
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<tr>
<th>Stat</th>
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<tbody>
<tr>
<td>Enrollment (Oct 2018)</td>
<td>60,205</td>
</tr>
<tr>
<td>Projected Enrollment 2020</td>
<td>63,785</td>
</tr>
<tr>
<td>High Schools</td>
<td>10</td>
</tr>
<tr>
<td>Number of Schools (Aug 2018)</td>
<td>72</td>
</tr>
<tr>
<td>Languages Served</td>
<td>70</td>
</tr>
</tbody>
</table>
Higher Education

- University of North Texas
  - New College at Frisco
    - Satellite facility of main UNT campus in Denton
    - Innovative, hands-on education infused with industry influence
  - Inspire Park
    - Innovation & Acceleration Center – open 2018
  - Collin County Campus – begin construction 2022
    - 100 acres at Preston/Panther Creek
    - Only 4-year, Tier 1 Research university in Collin County
Higher Education

- **Collin College**
  - Preston Ridge Campus in Frisco
    - Community College
    - 53,000 credit & continuing education students
    - 100 degree and certificate programs
    - The lowest tuition of any public college in Texas
  - **Cyber Security Program**
    - Federal grant / center of excellence
  - **National Convergence Technology Center**
    - $4.4M grant from the National Science Foundation
    - One of only four in the U.S.
  - **Center for Workforce & Economic Development (CWED)**
    - Customized training programs for needs of businesses, regional economy
Workforce & Labor

Workforce in Frisco: 78,857
Labor pool within 10 miles: 500,000
Unemployment Rate: 3.2%

Educational Attainment:
(Residents ages 25 & over w/ Bachelor’s Degree or higher): 61.6%
Nat’l avg. 28.5%
State avg. 29.6%

The region boasts more than twice the national average for key IT occupations.
Corporate Presence

- 4WEB Medical
- Addus HomeCare
- AmerisourceBergen
- Argon Medical Devices, Inc.
- Cardtronics
- Careington International
- Comstock Resources
- Conifer Health Solutions
- Corepoint Health
- Cornerstone Automation Systems, Inc. (CASI)
- Dairy.com
- Equinix
- Fiserv
- FM Global
- Gearbox Software LLC
- HCL America
- Home Depot Inc.
- JW Logistics
- Level 3 Communications
- MoneyGram Payment Systems
- National Breast Cancer Foundation, Inc.
- OpTic Gaming
- Oracle
- Paycor
- PowerSecure Lighting
- Schlumberger Technology Corp.
- Schneider Optical Machines Inc.
- SUNTECKtts
- T-Mobile
- The Hartford
- ThyssenKrupp Elevator Corp.
- Transplace Texas LP
- Wintrust Commercial Finance
- WorldLink Inc.
Visitor and Tourism Information

- Annual visitors: 6.09 million
- Average daily visitors: 40,120
- Visitor industry supported jobs: 12,819
- Total conference & group meeting spending: $169 million
- Total direct visitor industry spending: $1.9 billion
- Retail – largest visitor spending: $676 million
- Restaurants – 2nd largest visitor spending: $448 million
- Retail square feet: 11.5 million

Source: 2016/2017 Frisco CVB Tourism Economic Impact Analysis, VisitFrisco.com, and CoStar
Frisco Hotel Inventories

Current Hotel Room Inventory (17) 2,603 Rooms

Hotels Under Construction (4) 503 Rooms

Hotels Announced (7) 1,311 Rooms

Potential Frisco Hotel Rooms in 2022 4,417 Rooms
Property Tax Rate Comparison

(Rates per $100 valuation – FY 2019)

Source: Collin County, Denton County, and Tarrant County Tax Assessor
Frisco North Platinum Corridor

NINE MILES:
Dallas North Tollway (DNT) between Sam Rayburn Tollway (SH 121) & Highway 380

PROJECTS:
• HALL Park
• The Star in Frisco
• Frisco Station
• The Gate
• Texas Scottish Rite Hospital–North Campus
• Stonebrook Business Park
• National Soccer Hall of Fame
• The Railhead
• Texas Health Hospital Frisco
• PGA of America
• LESSO
Hall Park
Building 17

- SWQ Warren Pkwy & Dallas North Tollway
- Spec Class AA Office Building
- HALL Group
- 12 stories
- 300,000 SF
- Opened Jan. 2018
- 82% leased
The Star
In Frisco

NWC Dallas North Tollway and Warren Parkway

- $1.5 Billion
- Dallas Cowboys World Corporate Headquarters & Training Facility
- 91 Acres
The Star in Frisco – Site Plan
The Star in Frisco

- 71 acres owned by Dallas Cowboys
- 20 acres owned by City of Frisco
- Dallas Cowboys’ World Corporate Headquarters – 411,000 SF Class A office building
- 180,000 SF retail/restaurant commercial – 85% leased
- Omni Hotel
The Ford Center at The Star in Frisco

- Publicly-owned, 557,881 SF, 12,000 seat multi-use event center / indoor stadium & practice fields
- High school football, concerts, NCAA, DI Lacrosse Patriot Cup, championship boxing, Track & Field Classic
Omni Hotel at The Star in Frisco

- 16 stories
- 300 rooms
- 25,000 SF conference center
Baylor Scott & White Sports Therapy & Research at The Star in Frisco

- 9 story – 300,000 SF office building
- Medical office (3), Surgery center, Outpatient imaging, Urgent care, Pharmacy
- Indoor/outdoor sports performance center
**Twelve At The Star in Frisco**

- 17-story, Residential High-Rise with 160 rental units
- Commercial and retail uses on first floor
- Underground parking garage
- Expected completion: 2019

SEC Gaylord Pkwy & Cowboys Way
Frisco Station

NWC Dallas North Tollway & Warren Pkwy

- Developers: Rudman Partnership, Hillwood Properties, VanTrust Real Estate
- 242 Acres
Frisco Station

242 Acres
5G network development

Tenants announced:
- Brierley+Partners (57K sq. ft.)
- FiServ (75K sq. ft.)
- Equinix (37K sq. ft.)

- Office space: 5,000,000 SF
- Medical office: 1,000,000 SF
- Retail: 250,000 SF
- Restaurants: 75,000 SF
- Potential direct jobs: 14,772
- Hotel rooms: 600
- Single-family units: 120
- Multi-family units: 2,400
The Offices One at Frisco Station

- 7-story, Spec Class A Office
- 228,000 SF
- Opened Dec. 2017
- 96% leased
The Offices Two at Frisco Station

- 6-story, Spec Class A Office
- 210,000 SF
- Under construction / Expected completion in 2019
The Hub at Frisco Station

- 625-Room Lifestyle Campus Hotel
- Developer: NewcrestImage

**PHASE 1:**
- AC by Marriott (8 stories) & Residence Inn (7 stories)
- Shared amenities
- 325 Rooms

**PHASE 2:**
- Canopy Hotel by Hilton & Hyatt Place
- 150 rooms each
- Complete Fall 2018
SkyHouse
Frisco Station

SWC John Hickman Pkwy & Gaylord Pkwy

- 25-story Luxury Residential High-Rise
- 332 rental units (studios, 1-3 bedroom)
- Sky Deck on 25th floor with pool, outdoor, kitchen, entertainment lounge
- Parking garage
- Opening in September 2019

SEE YOURSELF IN FRISCO
The Gate

NWC Dallas North Tollway & John Hickman Parkway

• $1 Billion

• Developer: Invest Group Overseas

• 41 Acres
The Gate

- 2.3M SF development
- Up to 876,000 SF, Class A office
- 150-room, 245,000 SF boutique hotel
- (2) 10-story luxury condos
- 980 luxury apartments
- 100,000 SF restaurants & retail

SEE YOURSELF IN FRISCO
Texas Scottish Rite Hospital for Children North Campus

- 300,000 SF ambulatory care center
- Conference center
- 30 acres of parks & sports fields
- Opened Oct. 2018

NEC Dallas North Tollway at Lebanon Road
Stonebrook Business Park

- Developer: Goveia Commercial Real Estate
- Class A value office: 480,000 SF
- Retail & restaurants: 38,000 SF
- 2 parking garages with 1,350 spaces total
- 2 Hotels: 300 rooms
- Conference center
Stonebrook Business Park

- Developer: Goveia Commercial Real Estate
- 3-story Spec Office Building
- 90,000 SF
- Under construction
National Soccer Hall of Fame & Toyota Stadium Improvements

SEC World Cup Way / Main St.

- $55+ Million Investment

- 100,000 SF, including 24,000 SF of exhibit space

- Stadium improvements complete summer 2018 / Phase I opened August 2018

- Hall of Fame Induction Ceremony took place October 20, 2018 and NSHOF opened November 2, 2018
The Railhead

- DNT and Main Street/Eldorado Parkway
- Developers: Newman Real Estate, Shula Netzer Real Estate, Koa Partners
- 80-acre mixed-use development
- 10-story, 250,000 SF Class-A office tower
- 12,000 apartment units
Railhead Tower

DNT Frontage btw. Main St. / Eldorado

- 250,000 sq. ft. Class-A, 10-story office building
Texas Health Hospital

SEC Dallas North Tollway at Cobb Hill Road

- 20 acres
- 325,000 SF, 8-story hospital with 80-bed acute care facility
- 120,000 SF medical office building with 90,000 SF for clinic space
- Jointly owned/operated by Texas Health & UT Southwestern Medical Center
- 4-story parking garage
- 24/7 emergency room
- Surgical services, Women’s services, Neonatal ICU
- Opening Jan. 2020

Developer: Texas Health Resources / UT Southwestern Medical Center
PGA of America Headquarters – Future Location
 PGA of America Headquarters
Public–Private Partnership

- 600 acres (50 ac. commercial / 550 ac. public facilities)
- Mixed-use development with an initial investment worth more than half a billion dollars.
- Two championship golf courses, a short course, and practice areas totaling 45 holes
- Clubhouse; Class AA office space
- 500-room Omni resort and 127K SF conference center
- Technologically advanced retail village
- Parks, open space, and several miles of trails
- Opening June 2022
Lesso Mall Development

- Developer: Lesso America
- Multi-level shopping center with additional retail, office, hotel and urban-living residential units
- 77 acres
Hunt Realty Investments – Site Location
Hunt Realty Investments – Headquarters Ranch

- Developers: Hunt Realty Investments Inc. and Karahan Cos.
- 2,544 acres
- Site planning underway for future mixed-use development
- Development expected to begin 2019
100 acre public-public partnership b/w City of Frisco, Frisco EDC, Frisco CDC, and UNT

Only 4-year, Tier 1 Research university in County

Will serve 5,000+ students

Begin construction in 2022
UNT Inspire Park

6170 Research Road

- 2-Story, 50,000 SF business incubator space w/ classroom & laboratory areas

- Provides partnership-based educational opportunities for the business community

- UNT took ownership in October 2018 / Classroom spaces opening in January 2019
NEC Main Street at Frisco Street

Frisco Fresh Market

- 32-acre indoor and outdoor farmers market, mixed-use development
- 168,000 SF Farmers Market, Beer garden, retail, live entertainment, 12 restaurants
- 600 multi-family units
- 3 hotels (limited service), 280+ guest rooms
  Under construction: Holiday Inn Express, Candlewood Suites
  Announced: La Quinta Del Sol
- Groundbreaking Phase 1: Fall 2016
- Anticipated opening: 2019 / Outdoor Market Grand Opening: June 2018
3-story, 38,500 sq. ft. building

Will include a reception/event hall, rooftop patios, retail, restaurant, and office uses

Announced tenants: Honour Espresso, Texana design company, Tumbleweed TexStyles creative craft workshop, Brookielynn's Bungalow, J&K Children's Supply, a luxury boutique gift shop, Makers Gym (creative coworking space)

Groundbreaking: Dec. 2018 / Anticipated opening: Fall 2019

The Patios at the Rail

SEC South County Road and Main Street

Developer: Nack Development
Frisco Ranch

- Developer: NewQuest Properties
- 110,000 SF specialty retail center

- Anchor tenants:
  - 99 Ranch Market – Asian supermarket
  - Daiso Japan – Home goods retailer
  - 85° Bakery Café – Taiwanese bakery and coffee café
- Opened 4th Qtr. 2018
NWQ SH 121 & Preston

Stonebriar Centre
Hyatt Regency Hotel
Stonebriar Centre

NWQ SH 121 & Preston Rd.
- Developer: Moon Hotel Stonebriar, Ltd.
- 15-story luxury hotel
- 303 Rooms
- 54,600 SF of meeting space
- 800-space parking garage
- Anticipated opening: Dec. 2019
KidZania USA

- First U.S. location opening Summer 2019 at Stonebriar Centre
- Includes U.S. Corporate Headquarters
- 85,000 SF
- 150 full-time jobs
- Educational & entertainment ‘job role-play’ center for children ages 4-12
Installation of a front section of a Boeing 737-500 plane on December 13, 2017 at future site of KidZania USA located at Stonebriar Centre.
Frisco Park 25

NWQ of Preston Road and Rockhill Parkway

216 acres

Sold to Blue Star Land; Closed January 15, 2019.

- Dallas Cowboys Merchandising Center: 407,857 SF
- Additional spec office / warehouse: 141,960 SF
## Recent Top Accolades

<table>
<thead>
<tr>
<th>Accolade &amp; Rank</th>
<th>Source</th>
<th>Date</th>
</tr>
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<tbody>
<tr>
<td>The Best Places to Live in America (#1)</td>
<td>Money Magazine</td>
<td>Sept. 2018</td>
</tr>
<tr>
<td>Safest Cities in America (#6)</td>
<td>SmartAsset.com</td>
<td>Jan. 2019</td>
</tr>
<tr>
<td>Fastest-Growing Large Cities in U.S. (#1)</td>
<td>U.S. Census Bureau</td>
<td>May 2018</td>
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<tr>
<td>Top 10 Rising Housing Markets (#9)</td>
<td>SmartAsset.com</td>
<td>May 2018</td>
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<tr>
<td>Fastest-growing cities in America (#1)</td>
<td>WalletHub.com</td>
<td>Oct. 2017</td>
</tr>
<tr>
<td>2017/18 American Cities of the Future, Top 10 Small American Cities (#8), Best in FDI Strategy</td>
<td>fDi Magazine</td>
<td>Sept. 2017</td>
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<tr>
<td>Best Real Estate Markets (#1) and Affordability &amp; Economic Environment (#1)</td>
<td>WalletHub.com</td>
<td>Aug. 2017</td>
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## More Accolades

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<tbody>
<tr>
<td>Frisco ISD – Best School Districts in TX (#8)</td>
<td>Niche.com</td>
<td>Feb. 2017</td>
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<tr>
<td>Best U.S. Cities for Families (#2)</td>
<td>ApartmentList.com</td>
<td>Jan. 2017</td>
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<tr>
<td>The 10 Most Successful Cities in America (#1)</td>
<td>Zippia.com</td>
<td>Aug. 2016</td>
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<tr>
<td>Best Cities to Start a Restaurant (#6)</td>
<td>NerdWallet.com</td>
<td>Aug. 2015</td>
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<tr>
<td>Best Mid-Sized Cities for Education (#2)</td>
<td>NerdWallet.com</td>
<td>Jan. 2015</td>
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<tr>
<td>Best Cities for Homeownership in Texas (#4)</td>
<td>NerdWallet.com</td>
<td>2014</td>
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<tr>
<td>Best Mid-sized city to move to (#1)</td>
<td>MSN Real Estate</td>
<td>2013</td>
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<tr>
<td>Top 10 Friendliest Cities in U.S. (#6)</td>
<td>Forbes.com</td>
<td>2013</td>
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<td>Safe &amp; Secure Communities</td>
<td>Allstate</td>
<td>2013</td>
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<tr>
<td>100 Best Communities for Young People</td>
<td>America’s Promise Alliance</td>
<td>2012</td>
</tr>
<tr>
<td>Best Place to Raise an Athlete</td>
<td>Men’s Journal</td>
<td>2011</td>
</tr>
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Thank you!

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