



WHY KANSAS CITY?



CBRE



QUICK STATS



population
2,157,584



households
844,378



multi-family rental units
135,641



workforce with bachelors degree or higher
37%
(32% national avg.)



pop growth since 2000
19%
(17% national avg.)



distance from center of U.S.
250 miles



more interstate miles per capita
than any other US city
30%



industrial completions since beginning of 2012
36.1 million sf



cost of living index
94.3
(U.S. = 100)



Tech Talent employment growth
in last 5 years
26%
(6th highest among the largest tech
markets in the U.S. and Canada)



biotech companies
200+

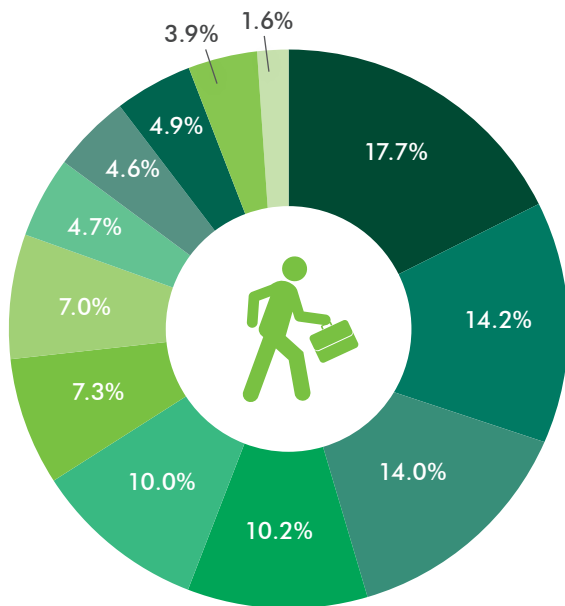


office market occupancy increase
510 basis-points
(Since 2013)





GREATER KANSAS CITY EMPLOYMENT BY SECTOR



- PROFESSIONAL AND BUSINESS SERVICES
- EDUCATION AND HEALTH SERVICES
- GOVERNMENT
- RETAIL TRADE
- LEISURE AND HOSPITAL SERVICES
- FINANCIAL ACTIVITIES
- MANUFACTURING
- WHOLESALE TRADE
- CONSTRUCTION AND MINING
- TRANSPORTATION/UTILITIES
- OTHER SERVICES
- INFORMATION

Source: U.S. Bureau of Labor Statistics 2018.



KANSAS CITY OFFICE SUBMARKETS (SF)

SF	SUBMARKET
17.2 M	South Johnson County
12.3 M	Downtown
5.4 M	North Johnson County
4.5 M	Kansas City North
4.0 M	South Kansas City
3.3 M	Plaza
3.1 M	East Kansas City
1.4 M	Midtown
0.9 M	Kansas City, KS

Source: CBRE Research, Q1 2019.

DID YOU KNOW?

DOWNTOWN REVITALIZATION

\$7.3B

Public and Private projects completed or under construction 2000-Q1 2019.

MOVING DOWNTOWN

33%

Projected Downtown Population increase 2018-2025

MULTI-FAMILY UNITS

5,100+

Downtown Multi-Family Units Completed 2014-Q1 2019





KANSAS CITY'S LARGEST PRIVATE EMPLOYERS

EMPLOYER	EMPLOYEES
Cerner Corp.	14,000
HCA Midwest Health System	9,934
The University of Kansas Hospital	9,810
St. Luke's Health System	8,020
Children's Mercy Hospital & Clinics	7,096
Ford Motor Company	7,030
Sprint Corp.	6,000
Hallmark Cards Inc.	5,000
Garmin International	3,651
Honeywell	3,637
Truman Medical Center	3,488
Black & Veatch	2,926
NPC International, Inc	2,889
Burns & McDonnell	2,792
Olathe Health	2,550
BNSF International	2,500
Amazon	2,500
Commerce Bank	2,459
Advent Health	2,453
UnitedHealth Group	2,400
Farmers Insurance	2,282
General Motors	2,200
Evergy Inc.	2,185
Prime Healthcare	2,144
UMB Bank	2,105
US Bank	2,100

Source: Kansas City Business Journal, 2018.



RECENT CORPORATE EXPANSIONS

- ALERE ESCREEN**
AMC ENTERTAINMENT
AUTOALERT
BLACK & VEATCH
BRR ARCHITECTURE
BURNS & MCDONNELL
CBIZ INC.
CERNER
CREATIVE PLANNING
CROSSFIRST BANK
DAIRY FARMERS OF AMERICA
EXL SERVICE
FREIGHTQUOTE
GARMIN
GEICO
HOLLIS & MILLER ARCHITECTS
HONEYWELL
- KIEWIT**
KUBOTA
MARINER WEALTH ADVISORS
MAXIMUS
MAZUMA CREDIT UNION
MEDIWARE INFORMATION SYSTEMS
NATIONAL BANK OF KANSAS CITY
NETSMART TECHNOLOGIES
NNSF
OPTUMRX
POLSINELLI
SANDBOX
SELECTQUOTE
SPRING VENTURE GROUP
SWISS RE
TERRACON
UNIVERSITY OF KANSAS

Source: CBRE Research, Q1 2019.

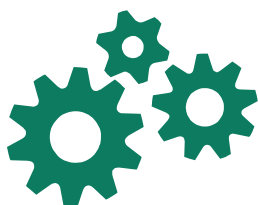


OUR INNOVATION



THE SILICON PRAIRIE

TECHNOLOGY FIRMS TAKE **5.4 MILLION** SQ. FT OF OFFICE SPACE IN KANSAS CITY



KANSAS CITY HIGH-TECH SOFTWARE/SERVICES JOBS GREW

76% FROM 2012-2017

Source: U.S. Bureau of Labor Statistics
(Metro Area) December 2018



25 TECHNOLOGY START-UP CULTIVATORS



KANSAS CITY RANKED **7TH** NATIONALLY FOR TECH TALENT "BRAIN GAIN", OR THE NUMBER OF ADDED TECH TALENT JOBS VERSUS THE NUMBER OF TECH DEGREES ISSUED.



6TH LARGEST GROWTH RATE FOR NORTH AMERICA TECH TALENT EMPLOYMENT OVER THE LAST 5 YEARS

HIGHER EMPLOYMENT GROWTH RATE FROM 2012-2017 OF TECH TALENT THAN SEVERAL MAJOR MARKETS INCLUDING LOS ANGELES, BOSTON, NEW YORK, DALLAS/FORT WORTH, HOUSTON, PHILADELPHIA, AND WASHINGTON D.C.





OUR INDUSTRY

FROM 2015-2018, THE KANSAS CITY INDUSTRIAL MARKET COMPLETED 25.1 MILLION SQUARE FEET WHICH WAS THE **HIGHEST TOTAL IN THE MIDWEST OUTSIDE OF CHICAGO**



KCI INTERMODAL BUSINESS CENTRE:

690-ACRE INDUSTRIAL PARK SOUTH OF KCI INTL AIRPORT, **1.4 MSF** COMPLETED, 100% OCCUPANCY, PLANNED **5.4 MSF** AT FULL CAPACITY

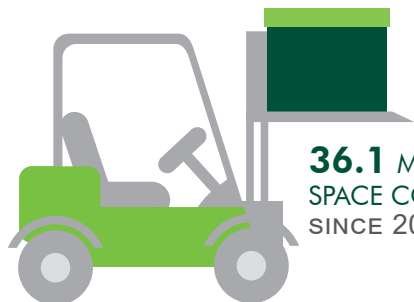


OVER **\$2 BILLION** IN COMBINED NEW INVESTMENTS BY THE FORD MOTOR COMPANY AND GENERAL MOTORS

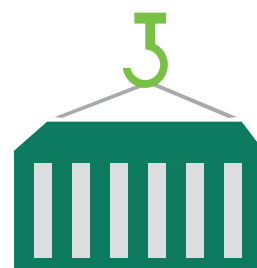


LOGISTICS PARK KC:

THE MOST SUCCESSFUL INDUSTRIAL PARK IN THE NATION SURROUNDING BNSF INTERMODAL, **11.0 MSF** COMPLETED OR UNDER CONSTRUCTION, PLANNED **36+ MSF** AT FULL CAPACITY



36.1 MSF OF INDUSTRIAL SPACE COMPLETED SINCE 2012



CENTERPOINT-KCS INTERMODAL CENTER:

970-ACRE INDUSTRIAL PARK SURROUNDING KANSAS CITY SOUTHERN INTERMODAL, **1.4 MSF** COMPLETED, PLANNED **5.0 MSF** AT FULL CAPACITY



OUR ADVANTAGE

COST OF LIVING INDEX - 94.3

RANKED **#2**
U.S. CITIES FOR HIGH PAYING JOBS
AND LOW COST OF LIVING
CNBC MAKE IT
2018

RANKED **#5**
BEST PLACES FOR WORK LIFE BALANCE
BUSINESS INSIDER
2018



36.6% OF WORKFORCE
HAS A BACHELOR'S DEGREE
OR HIGHER



POPULATION OF **2.1 MILLION**
REFLECTS A GROWTH RATE OF **19%**
SINCE 2000



3.8%
UNEMPLOYMENT
RATE



RANKED **#2**
TOP CITY FOR COLLEGE GRADS
ZIPRECRUITER
2017

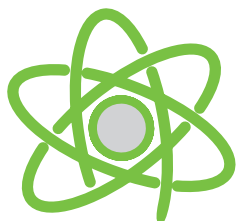


MEDIAN HOME VALUE:
\$182,838

19.5% LOWER THAN THE
NATIONAL AVERAGE



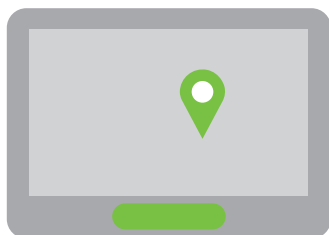
OUR DEVELOPMENT



CERNER HAS COMPLETED THE FIRST PHASE, AND BEGAN CONSTRUCTION ON THE SECOND PHASE OF A NEW

4.7 MILLION SF CAMPUS.

IT IS ESTIMATED TO COST **\$4.45 BILLION** AND RESULT IN **16,000** NEW EMPLOYEES.



A **\$200 MILLION** EXPANSION IS UNDERWAY AT GARMIN HEADQUARTERS WITH PLANS TO HIRE **2,600** ADDITIONAL EMPLOYEES



THE KANSAS CITY MULTIFAMILY MARKET IS ONE OF THE HOTTEST IN THE NATION ADDING OVER

14,817 UNITS SINCE 2014



BURNS & MCDONNELL COMPLETED A **311,000 SF** HEADQUARTERS EXPANSION IN 2016 AND RECENTLY BEGAN AN ADDITIONAL **142,000 SF** EXPANSION. THE COMPANY ADDED APPROXIMATELY 1,200 EMPLOYEES IN 2018.





TRANSPORTATION | INFRASTRUCTURE

ONE OF THE **SHORTEST**
COMMUTE TIMES IN THE NATION,
AVERAGING **23 MINUTES**



OPENED IN **2016**
THE NEW DOWNTOWN STREETCAR LINE
SPANS

2.2 MILES

FROM THE NORTH END OF
DOWNTOWN TO THE SOUTH END.

THE STREETCAR HAS SURPASSED
ALL EXPECTATIONS FOR RIDERSHIP,
LOGGING ITS 6 MILLIONTH RIDER IN
MARCH 2019.



VOTERS APPROVED A 3.75 MILE EXTENSION
TO THE COUNTRY CLUB PLAZA

NEW **\$1.5 BILLION** SINGLE
TERMINAL AIRPORT BROKE GROUND
IN MARCH 2019, WITH EXPECTED
COMPLETION IN **2023**.

MORE THAN **\$2.0 BILLION** OF
NEW INVESTMENTS DOWNTOWN
HAVE DEVELOPED SINCE THE
APPROVAL OF THE STREETCAR LINE.



30% MORE INTERSTATE MILES PER
CAPITA THAN ANY OTHER CITY IN
THE **NATION**

MORE RAIL TRAFFIC (IN TERMS OF
TONNAGE) THAN ANY OTHER CITY
IN THE **U.S.**





BIOSCIENCE | ANIMAL HEALTH



THE **ANIMAL HEALTH CORRIDOR**, ANCHORED BY MANHATTAN, KS, AND COLUMBIA, MO, IS HOME TO MORE THAN **300** ANIMAL HEALTH COMPANIES, REPRESENTING THE LARGEST CONCENTRATION IN THE WORLD



20 UNIVERSITIES THROUGHOUT THE REGION OFFER UNDERGRADUATE, GRADUATE AND POST-DOCTORATE DEGREES IN BIOSCIENCE-RELATED PROGRAMS

KANSAS CITY IS THE HEART OF THE ANIMAL HEALTH CORRIDOR WHICH REPRESENTS **56%** OF TOTAL WORLDWIDE ANIMAL HEALTH, DIAGNOSTICS, AND PET FOOD SALES



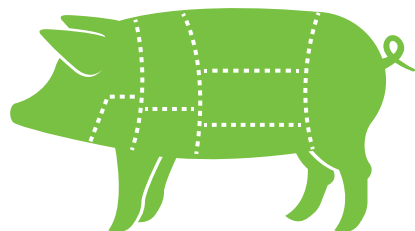
RATED **5TH** PER CAPITA IN CLINICAL TRIALS CONDUCTED BY **100+** CLINICAL RESEARCH ORGANIZATIONS IN THE REGION



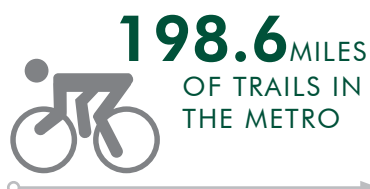
THE REGION OFFERS **8** INCUBATORS AND SEVERAL **SCIENCE PARKS** ARE AVAILABLE OR UNDER DEVELOPMENT



OUR LIVABILITY



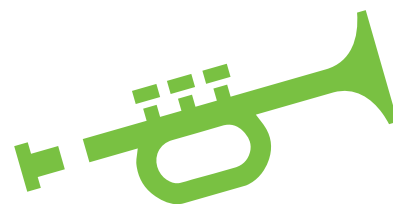
#1 FAVORITE CITY FOR BBQ
TRAVEL & LEISURE, 2016



198.6 MILES
OF TRAILS IN
THE METRO



KANSAS CITY
NO. 1 MOST LOVABLE CITY
HUFFINGTON POST, 2016



**WORLD CLASS
ENTERTAINMENT**
POWER & LIGHT DISTRICT
VILLAGE WEST
COUNTRY CLUB PLAZA
CROWN CENTER
ZONA ROSA
STARLIGHT THEATRE
KAUFFMAN CENTER FOR
THE PERFORMING ARTS

SPORTS

CHIEFS • SPORTING KC • ROYALS



2015 **WORLD SERIES**
2014 **AMERICAN LEAGUE CHAMP**
2013 **MLS CUP**



45,000 ACRES
METRO PARKS

WORLD CLASS MUSEUMS

KANSAS CITY IS A MAJOR CULTURAL
CENTER, FEATURING ONE OF THE LARGEST
COLLECTIONS OF NATIONAL MUSEUMS IN THE
COUNTRY

THE NELSON-ATKINS MUSEUM OF ART	THE MONEY MUSEUM
KEMPER MUSEUM OF ART	THE NATIONAL MUSEUM OF TOYS AND MINIATURES
NEGRO LEAGUES BASEBALL MUSEUM	NATIONAL AIRLINE HISTORY MUSEUM
THE NATIONAL WORLD WAR I MUSEUM	NATIONAL FRONTIER TRAILS MUSEUM
AMERICAN JAZZ MUSEUM	THE NATIONAL ARCHIVES AT KANSAS CITY





No. 2 U.S. Cities for High Paying Jobs and Low Cost of Living
CNBC Make It, 2018

No. 5 Best Places for Work Life Balance
Business Insider, 2018

No. 3 Best Cities for Jobs
Glassdoor, 2017

No. 2 City for High Wage Jobs
Forbes, 2017

No. 4 City for Manufacturing Job Growth
Forbes, 2017

No. 5 City for Tech Jobs
Money, 2017

No. 4 Best City for Startups in U.S.
Entrepreneur, 2017

No. 9 Destination City
U-Haul, 2017

No. 5 City for College Grads
Yahoo Finance, 2017

No. 2 City for Women in Tech
SmartAsset, 2017
Most Spectacular Theatre in the U.S.
Curbed, 2017

No. 15 Busiest Metro for Commercial Construction
Dodge Data & Analytics, 2017

No. 5 in Outstanding Architecture
Curbed, 2017

No. 4 Best City for Career Opportunities
Fast Company, 2017

No. 1 City for an Affordable Getaway
Travel + Leisure, 2016

No. 1 Stadium in MLB
Sports on Earth, 2016

6 Cities that Offer the Best Value for Startups
Forbes, 2016

Hotbed of Arts & Culture
National Center for Arts Research, 2016
Happiest City to Work
Forbes, 2016

Top 10 Most Affordable Cities
PureWow, 2016
No. 1 Most Lovable City
Huffington Post, 2016

Kansas City: A Future Ready Economy
Dell, 2016

The Top Ten Cities for Creatives (#10)
Huffington Post, 2015

No. 4 Most Cultured Cities in America
Huffington Post, 2015

America's Most Charming Cities
Travel + Leisure, 2015

Forget Silicon Valley: 7 Better Cities for Startups
U.S. Department of Commerce, 2015



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