

NORTH SHORE DISTRICT

Target Industry Study & Recruitment Strategy



AVALANCHE CONSULTING

Table of Contents

INTRODUCTION	3
ABOUT THIS REPORT	4
ECONOMIC & DEMOGRAPHIC DYNAMICS	5
POPULATION GROWTH	7
HOUSING	8
AGE DISTRIBUTION	9
YOUNG PROFESSIONALS	11
EDUCATIONAL ATTAINMENT	12
HOUSEHOLD INCOME.....	13
POVERTY LEVELS.....	14
DIVERSITY	15
EMPLOYMENT.....	16
UNEMPLOYMENT	17
EMPLOYMENT BY INDUSTRY	18
EMPLOYMENT CHANGE BY INDUSTRY.....	19
EMPLOYMENT DYNAMICS BY INDUSTRY	20
PAY BY INDUSTRY	23
SELF-EMPLOYMENT	24
SMALL BUSINESS.....	25
HOUSING COSTS & OWNERSHIP.....	26
COMMUTING PATTERNS	27
CRIME	31
TAX REVENUE BY LAND USE	32
PROPERTY TAX RATE.....	33
REGIONAL EMPLOYMENT GROWTH.....	34
REGIONAL POPULATION GROWTH.....	35
TARGET INDUSTRY IDENTIFICATION	36
TARGET SELECTION PROCESS	38

TARGET RECOMMENDATIONS	39
ADVANCED MANUFACTURING	40
BUSINESS & PROFESSIONAL SERVICES	42
EDUCATIONAL SERVICES	44
HEALTH CARE & LIFE SCIENCES	46
TARGET INDUSTRY RECRUITMENT STRATEGY	48
NORTH SHORE DISTRICT MARKETING TOOLKIT	49
ADVANCED MANUFACTURING.....	51
BUSINESS & PROFESSIONAL SERVICES	53
EDUCATIONAL SERVICES	55
HEALTH CARE & LIFE SCIENCES	56

INTRODUCTION

Rowlett is a suburban bedroom community for the larger Dallas metropolitan area. Once almost exclusively residential in character, Rowlett has benefited from additional retail activity in recent years. New developments within two of Rowlett's most unique assets promise to further diversify the city. The Village of Rowlett will bring new housing and retail activity to the city's historic downtown. The Bayside development, located on the site of the former Elgin B. Robertson Park, will enrich Rowlett with additional retail, entertainment, and residential offerings. With an emphasis on commercial and industrial development, the North Shore District represents a complimentary component in Rowlett's long-term strategy to emerge as community where residents can live, play, and work.

Rowlett has one of the greatest imbalances of population and employment among any city in the Dallas metropolitan area. Fewer than 10% of Rowlett residents are employed within the city. Additionally, the city is home to four employed residents for every single job. Among the more than 50 cities with 10,000 or more residents within the Dallas region, only The Colony has a greater imbalance of employed residents to jobs.

Rowlett is also characterized by relatively little overlap between the skills of its residents and the occupations available in the city. Rowlett residents are typically well-educated individuals employed in high-paying occupations. A disproportionate share of jobs within the city, however, is in lower-skill, lower-income positions. If Rowlett is to become a more balanced community, the city's development pattern must evolve to accommodate an even greater diversity of uses.

Rowlett features three advantages critical to greater economic vibrancy—a large workforce, infrastructure, and land. There are more than 100,000 surplus workers extending across virtually every industry living within 10 miles of Rowlett. The completion of the President George Bush Turnpike, complimented by the existing DART station, provides Rowlett with efficient connections to the rest of the Dallas region. Thanks to the efforts of local visionary leaders in the past, Rowlett's North Shore District provides the city with prime land for commercial development.

The North Shore District is central to Rowlett's future economic development efforts. Bedroom communities typically fail to evolve into more diversified locales due to difficulty of simultaneously delivering companies a critical mass of workers while also providing sufficient land for commercial activity. Aggressively courting residential development is often the highest priority for younger communities, as the presence of a large number of people is generally a prerequisite for the subsequent recruitment of retail and commercial uses. Once these communities have established population and retail bases, however, they may discover very little land remains available for commercial activities such as office and industrial facilities.

By offering companies a large number of skilled workers and the land necessary to accommodate their operations within the city, Rowlett is competitively positioned to deliver greater job opportunities to existing residents while also securing the city's fiscal health. Fully realizing the city's potential to capture additional employment growth and private capital investment in the years ahead, however, will require that the North Shore District remain preserved for non-residential uses.

ABOUT THIS REPORT

The North Shore Target Industry Study & Recruitment Strategy involves three components:

Part 1: Economic & Demographic Overview

The first section of the report provides a detailed analysis of the economic and demographic dynamics operating within the City of Rowlett and the broader Dallas metropolitan region. The section highlights trends relevant to the North Shore District's development, including employment growth and composition, population growth and composition, labor force availability, commuting patterns, tax rates and revenues, and other competitive factors.

Phase 2: Target Industry Identification

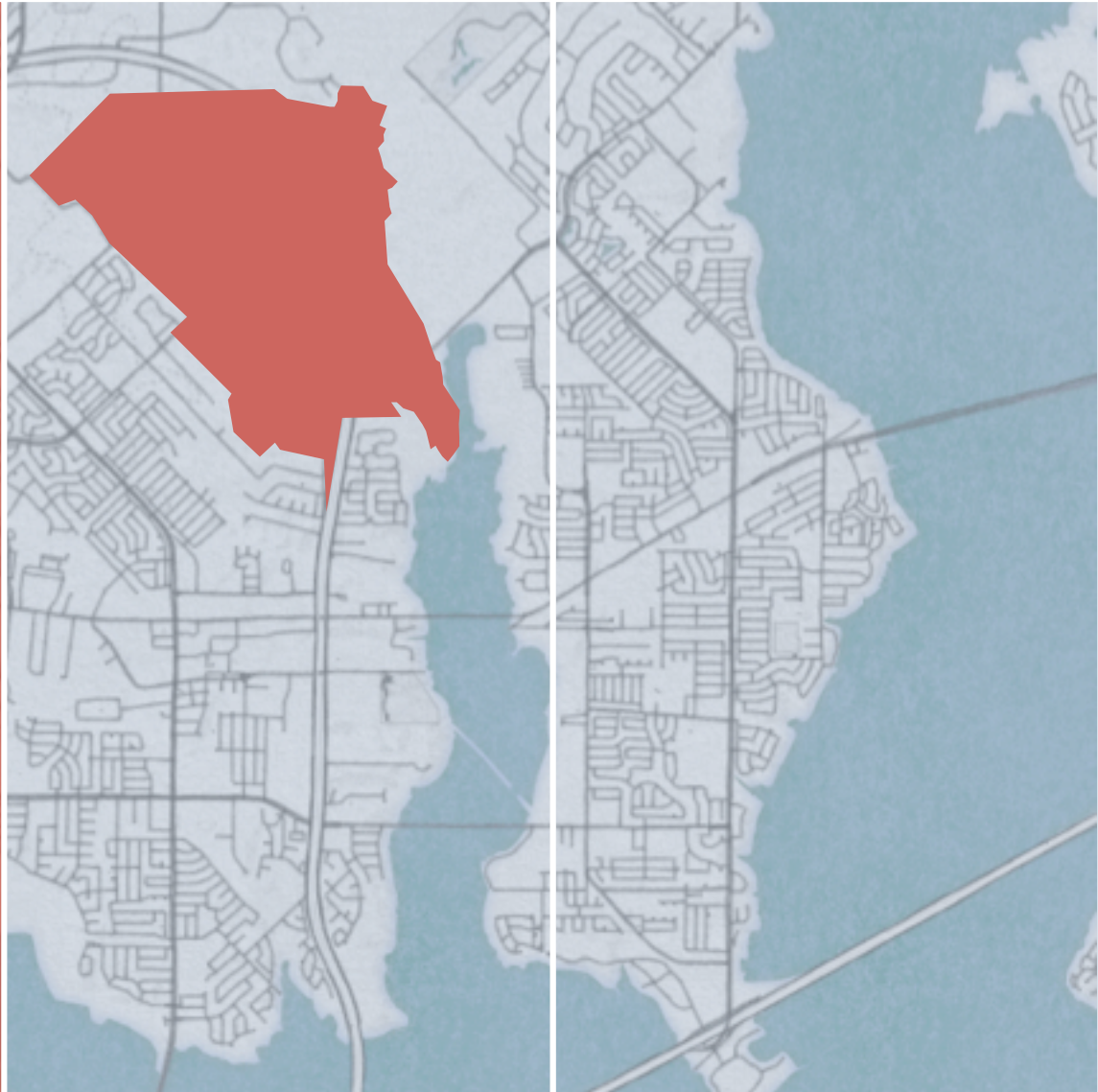
The second section of the report identifies a series of target industries recommended for the North Shore District. Each target industry profile includes an examination of state, national, and global industry trends and how they will potentially impact the Dallas region, the City of Rowlett and the North Shore District.

Phase 3: Target Industry Recruitment Strategy

The final section of the report provides a series of strategic recommendations that will help Rowlett realize its vision for the North Shore District. The Target Industry Recruitment Strategy will emphasize marketing initiatives the City of Rowlett can implement to help increase awareness of the North Shore District and effectively position the site for commercial and industrial development.

ECONOMIC & DEMOGRAPHIC DYNAMICS

The first section of the report examines recent economic and demographic trends occurring throughout the City of Rowlett, the Dallas metropolitan region, Texas, and the US. Examined metrics include employment growth and composition, population growth and composition, labor force availability, and commuting patterns.



ECONOMIC & DEMOGRAPHIC DYNAMICS OVERVIEW

The City of Rowlett is far more vibrant demographically than economically. The city's population is booming; since 2000, Rowlett's population has increased at more than the twice the rate of US overall growth. Rowlett is home to an educated workforce; educational attainment rates among the city's young professionals exceed the averages of the Dallas Metro, Texas, and the US. The City of Rowlett is also an affluent community. At \$83,000, the median income of Rowlett households is approximately \$30,000 higher than the national average. Finally, Rowlett is a relatively diverse community, with significant Hispanic, African-American, and Asian populations.

If any community within the Dallas metropolitan region could be described as a bedroom community, it is the City of Rowlett. More than 90% of residents leave the city to reach their place of employment. The daily exodus of workers from Rowlett reflects the quantitative and qualitative limits of the city's existing employment base. The City of Rowlett is home to four workers for every single job. Among the more than 50 cities within the Dallas metropolitan region with at least 10,000 residents, the City of Rowlett has the second lowest proportion of jobs to workers. Additionally, employment in Rowlett is dominated by low-skill, low-wage positions in industries such as retail and food service. As a result, job opportunities within Rowlett are often misaligned with the skills possessed by the city's residents.

The imbalance between population and employment within Rowlett has important implications for the city's fiscal health as well as the physical health of residents.

Single-family residential development often fails to generate sufficient tax revenues to support expenses such as police and fire protection, road infrastructure, and education. According to a previous analysis by Ricker Cunningham, for example, a \$360,000 home within Rowlett produces just \$1 in net tax revenue for the city on a per acre basis. In 2015, the average sales price of a home within the City of Rowlett was slightly more than \$200,000. With its tax burden overwhelmingly supported by residential development, the City of Rowlett has been forced to rely on relatively high property tax rates. Among cities with at least 10,000 residents within the Dallas region, Rowlett has the 8th highest city property tax rate. This scenario is unlikely to change without substantial commercial and industrial development.

The shortage of employment opportunities within Rowlett forces most employed residents to undertake significant commutes. The average worker living in Rowlett spends 31 minutes traveling to work; only a handful of communities within the Dallas region have longer commutes. In a 2013 study published in *The American Journal of Preventive Medicine*, which relied on participants from the Dallas region, driving more than 10 miles each way to work increased the risk of high blood pressure, obesity, and depression.

Fortunately, the City of Rowlett possesses both the labor force and the real estate to attract greater levels of commercial and residential development. The second section of the report—Target Industry Identification—will highlight potential market opportunities.

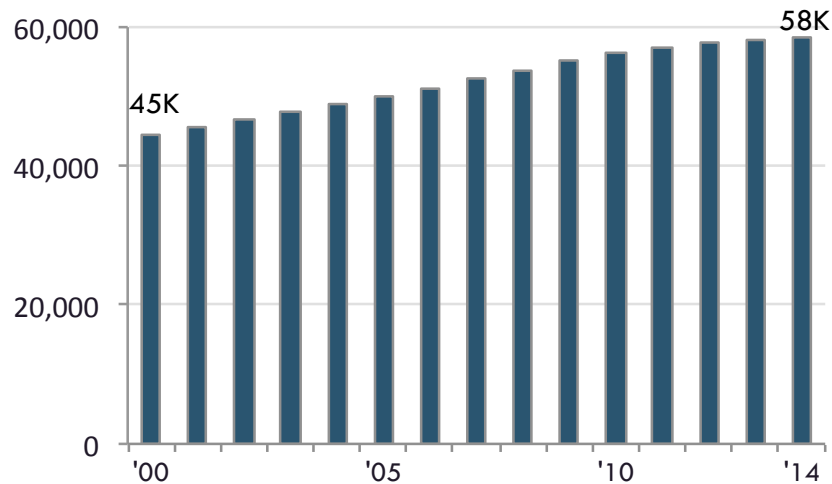
POPULATION GROWTH

WHY IS THIS IMPORTANT?

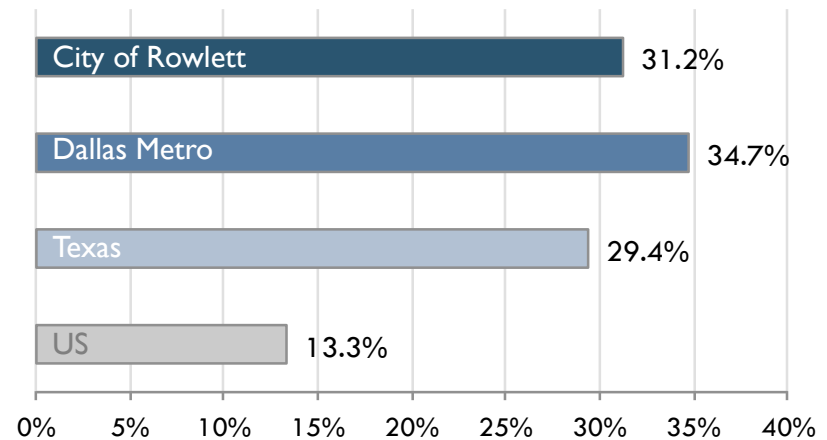
Population growth often reflects a community's recent success and potential for further growth. Businesses are attracted to growing communities because of the relative ease of recruiting and retaining employees.

The City of Rowlett is located on the periphery of one of the fastest growing metropolitan areas located within one of the fastest growing states in the US. Since 2000, the population of the City of Rowlett has increased more than 31%, more than twice the US growth rate during this period. The population of the Dallas metro increased nearly 35% during this period.

CITY OF ROWLETT TOTAL POPULATION



POPULATION GROWTH 2000 - 2014



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

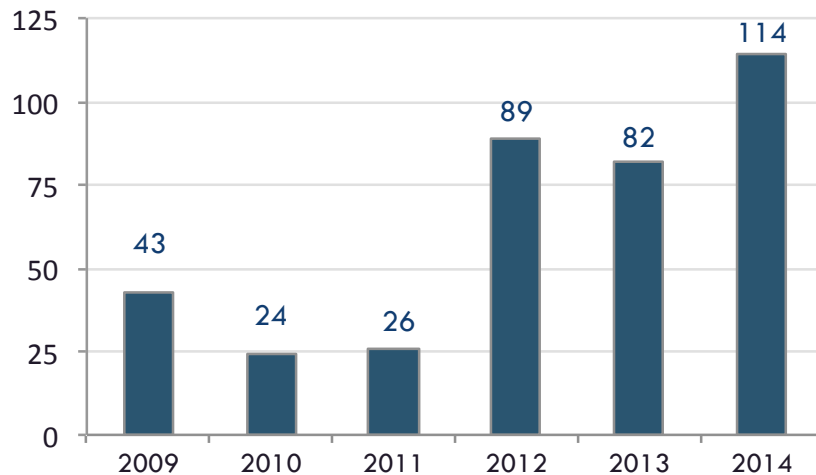
HOUSING

WHY IS THIS IMPORTANT?

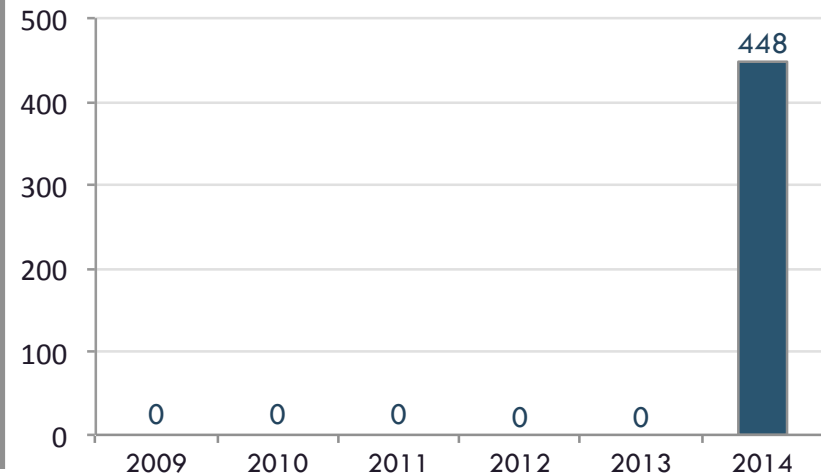
A growing housing stock bolsters local employment in industries such as construction and retail. Increased inventory also helps keep home prices affordable. Additionally, stable home prices contribute to heightened local consumer confidence.

After several years of limited residential housing construction, single-family construction in the City of Rowlett strongly rebounded in 2012 and has remained relatively high ever since. In 2014, the City of Rowlett issued the first permits for multi-family buildings in more than 5 years.

CITY OF ROWLETT
SINGLE-FAMILY HOUSING PERMITS ISSUED



CITY OF ROWLETT
MULTI-FAMILY UNIT BUILDING PERMITS ISSUED



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

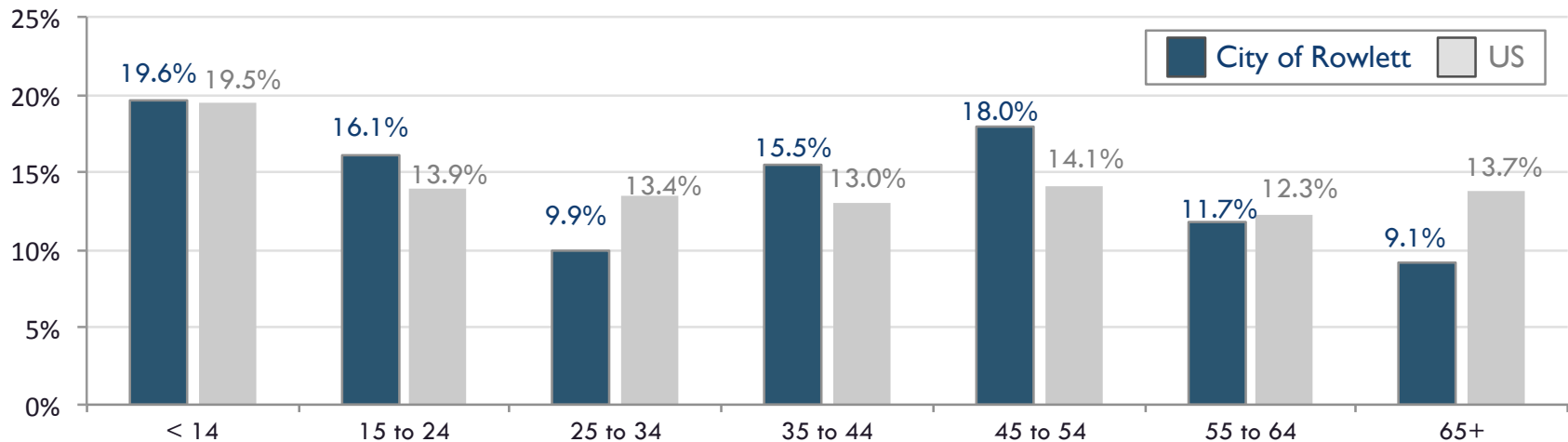
AGE DISTRIBUTION

WHY IS THIS IMPORTANT?

Age distribution patterns indicate a community's appeal to individuals at various life stages, including younger workers, retirees, and families.

The City of Rowlett is slightly older than the US as a whole. Residents between the ages of 35 to 54 represent a third of the population (compared to the US average of 27%). 20% of City of Rowlett residents are age 55 and older compared to 26% for the US as a whole.

COMPOSITION BY AGE 2014



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

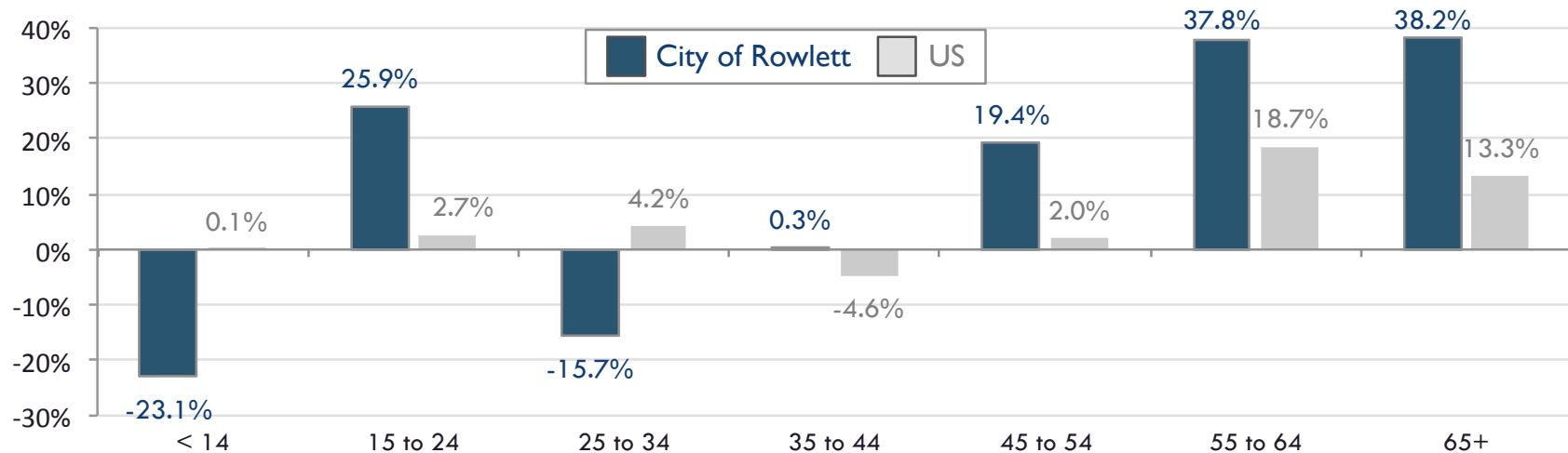
AGE DISTRIBUTION (continued)

WHY IS THIS IMPORTANT?

Age distribution patterns indicate a community's appeal to individuals at various life stages, including younger workers, retirees, or families.

The City of Rowlett's population is growing older. The changing of the city's demographic composition appears to be driven by the aging of young families with children. The number of young children is declining, the number of young adults is growing, and the number of residents age 55 and older is quickly rising.

POPULATION GROWTH BY AGE
2009 - 2014



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

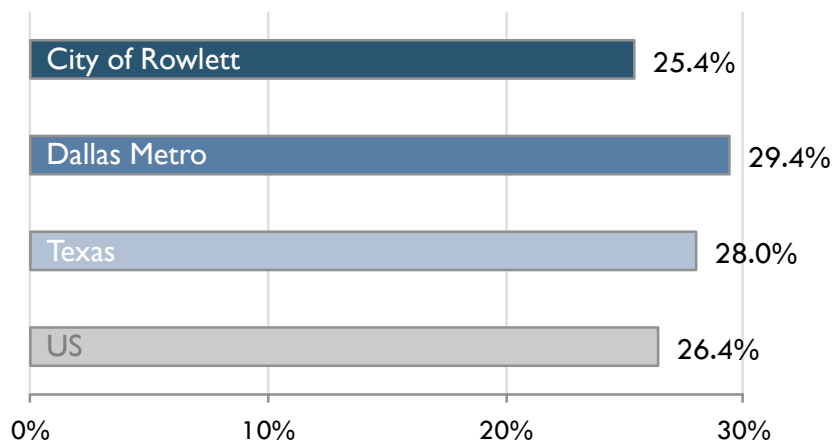
YOUNG PROFESSIONALS

WHY IS THIS IMPORTANT?

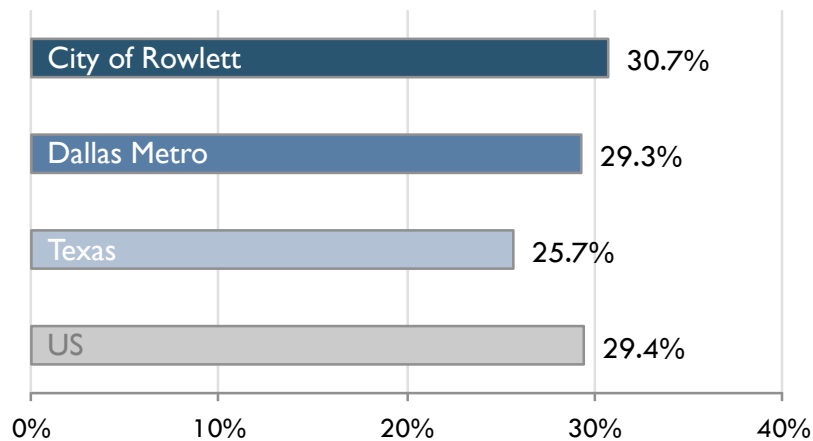
The share of a community's population between the ages of 25 and 44 is an important component of a community's workforce and one valued by companies looking to expand and relocate. The presence of these 'young professionals' assures businesses that they will have a talent pool needed to fuel growth.

Young professionals represent approximately 25% of the City of Rowlett's population, trailing the averages of the Dallas metro, Texas, and the US. More than 30% of young professionals in the City of Rowlett possess a bachelor's degree, a higher proportion than the US and Texas averages but slightly lower than the Dallas metro average.

YOUNG PROFESSIONALS (POP. AGE 25-44)
2014



YOUNG PROFESSIONALS W/ BACHELOR'S DEGREE
2014



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

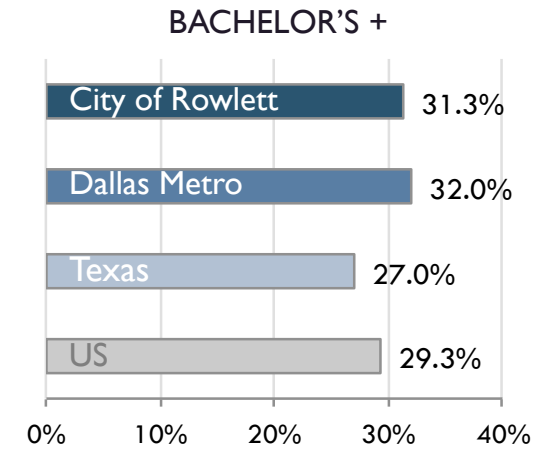
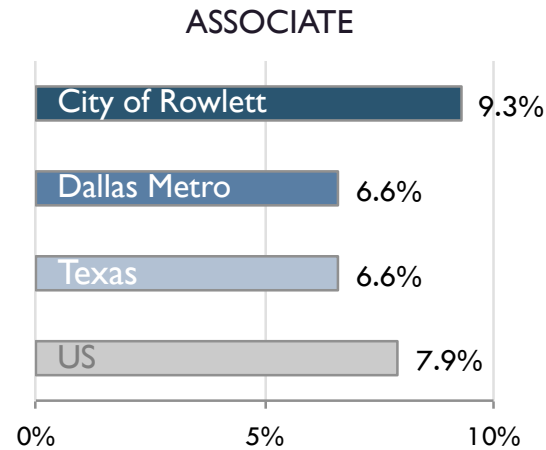
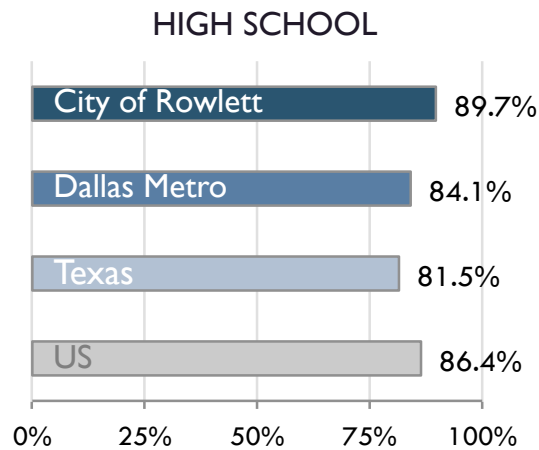
EDUCATIONAL ATTAINMENT

WHY IS THIS IMPORTANT?

In today's "war for talent," a region's educational attainment levels are among the most widely examined workforce characteristics by relocating business and residents. Many professional services firms require workers with advanced education while manufacturers increasingly want workers with an associate degree.

At the high school and associate degree level, the City of Rowlett outperforms the Dallas metro, the State of Texas, and the US average in educational attainment. More than 31% of City of Rowlett residents possess a bachelor's degree or higher level of educational attainment, higher than the Texas and US averages.

EDUCATIONAL ATTAINMENT 2014



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

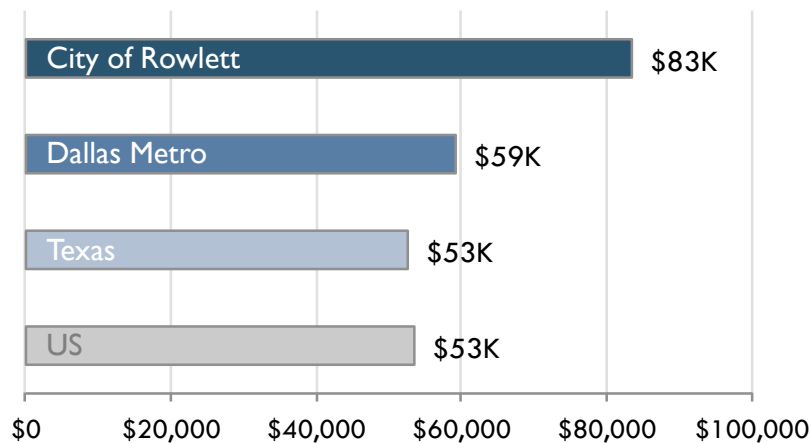
HOUSEHOLD INCOME

WHY IS THIS IMPORTANT?

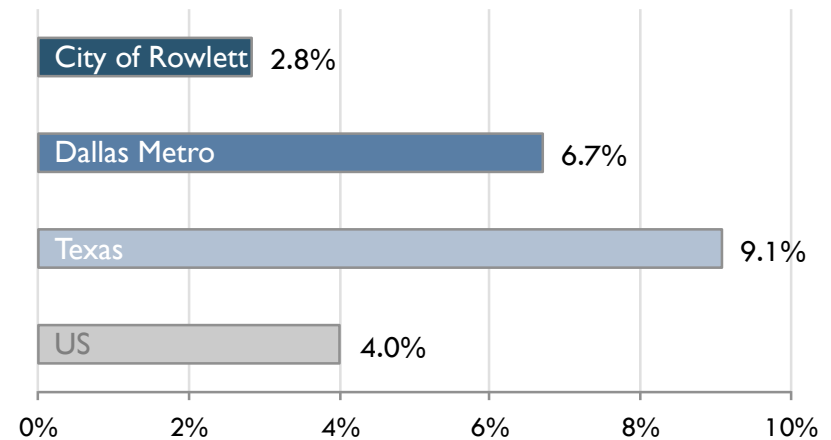
Household income gains are associated with rising prosperity and community wealth generation. Household incomes vary between communities based on wage levels, the size of households, and the level of labor force participation (whether spouses and teens are working).

The City of Rowlett is an affluent community. Median household income in the City of Rowlett is approximately \$83,000, significantly greater than figures for the Dallas metro, Texas, and US.

MEDIAN HOUSEHOLD INCOME
2014



CHANGE IN MEDIAN HOUSEHOLD INCOME
2009 – 2014 (UNADJUSTED FOR INFLATION)



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

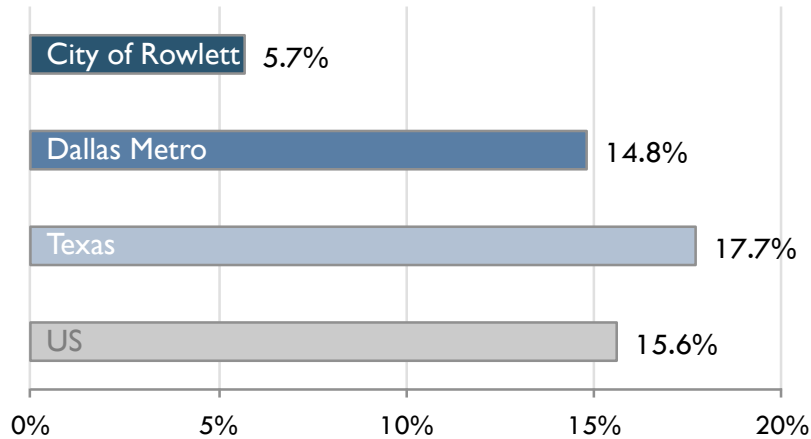
POVERTY LEVELS

WHY IS THIS IMPORTANT?

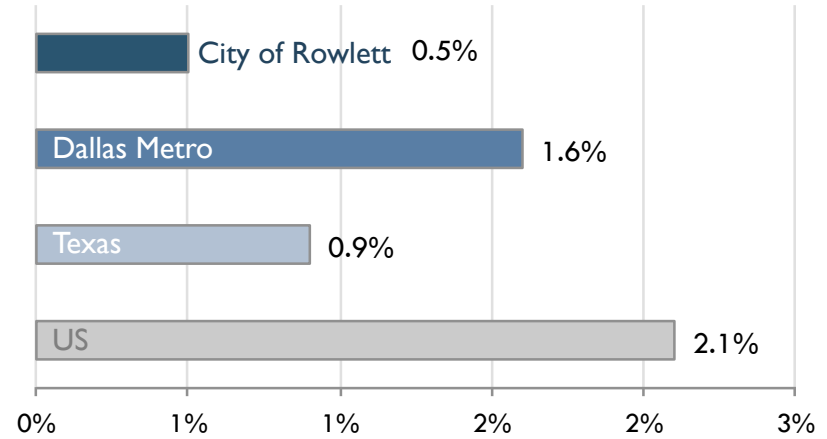
Like income, poverty rates measure a community's relative wealth and the resulting distribution of economic success. Notably, the income threshold that determines poverty is set nationally and does not take into account differences in relative cost of living.

At less than 6%, the City of Rowlett's poverty rate is less than half that of the Dallas metro, Texas, or US. Between 2009 and 2014, the City of Rowlett also experienced a smaller increase in the proportion of residents living in poverty compared the Dallas metro, Texas, or US.

POVERTY RATE
2014



PERCENTAGE POINT CHANGE IN POVERTY RATE
2009 - 2014



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

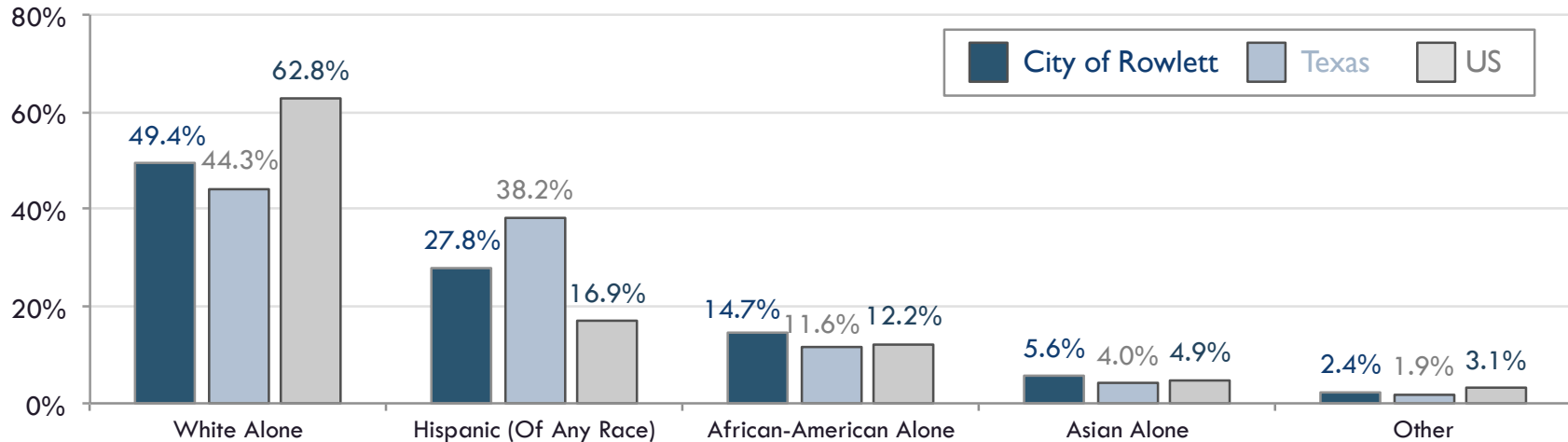
DIVERSITY

WHY IS THIS IMPORTANT?

Diversity contributes to greater innovation, creativity, and other critical drivers of success. Communities that engage a diverse population enjoy competitive advantages that come from a workforce with varied perspectives and skillsets. Diversity can also help attract young professionals.

The City of Rowlett is more racially and ethnically diverse than the national average but less racially and ethnically diverse than Texas. On a proportional basis, the City of Rowlett is home to a higher proportion of Hispanic and Asian residents relative to the US average.

POPULATION BY RACE & ETHNICITY
2014



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

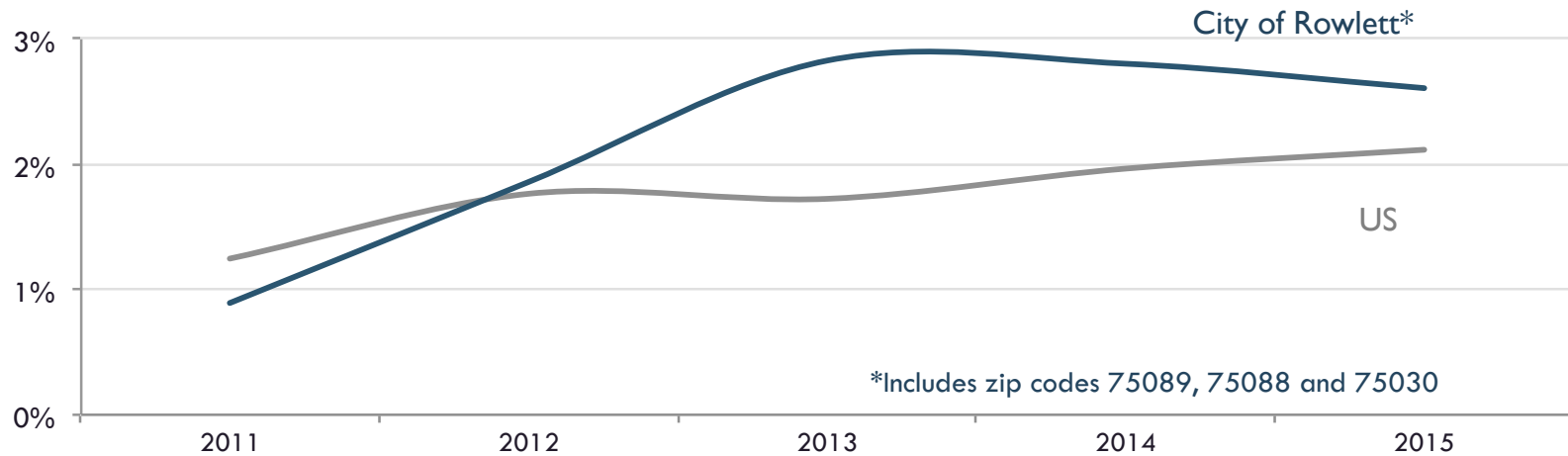
EMPLOYMENT

WHY IS THIS IMPORTANT?

Employment growth is a primary indicator of overall economic health. Higher job growth translates into greater prosperity for a community. New workers are drawn to regions that have abundant employment opportunities. Businesses seek locations where other companies are growing and the labor force is increasing.

In recent years, employment growth in the City of Rowlett has outpaced the US average. Between 2010 and 2015, total employment in the City of Rowlett increased 11.4%. Employment growth in the US was 9.1% during this period.

ANNUAL EMPLOYMENT GROWTH



SOURCE: EMSI / AVALANCHE CONSULTING

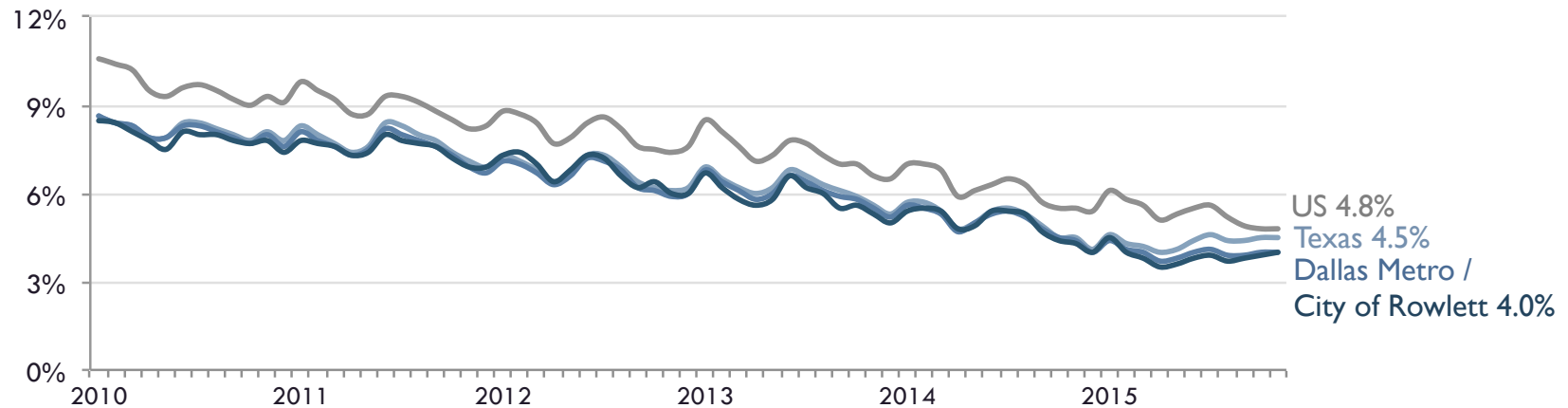
UNEMPLOYMENT

WHY IS THIS IMPORTANT?

Higher unemployment levels suggest that regional employers are not fully utilizing the locally available workforce. In turn, higher levels of employment among residents helps drive additional demand for local goods and services.

Since 2010, the City of Rowlett's unemployment rate has been consistently less than the US and Texas averages. As of December 2015, the City of Rowlett's unemployment rate was 4.0%, identical to the Dallas metro average. The unemployment rates for the US and Texas were 4.8% and 4.5%, respectively.

MONTHLY UNEMPLOYMENT RATE



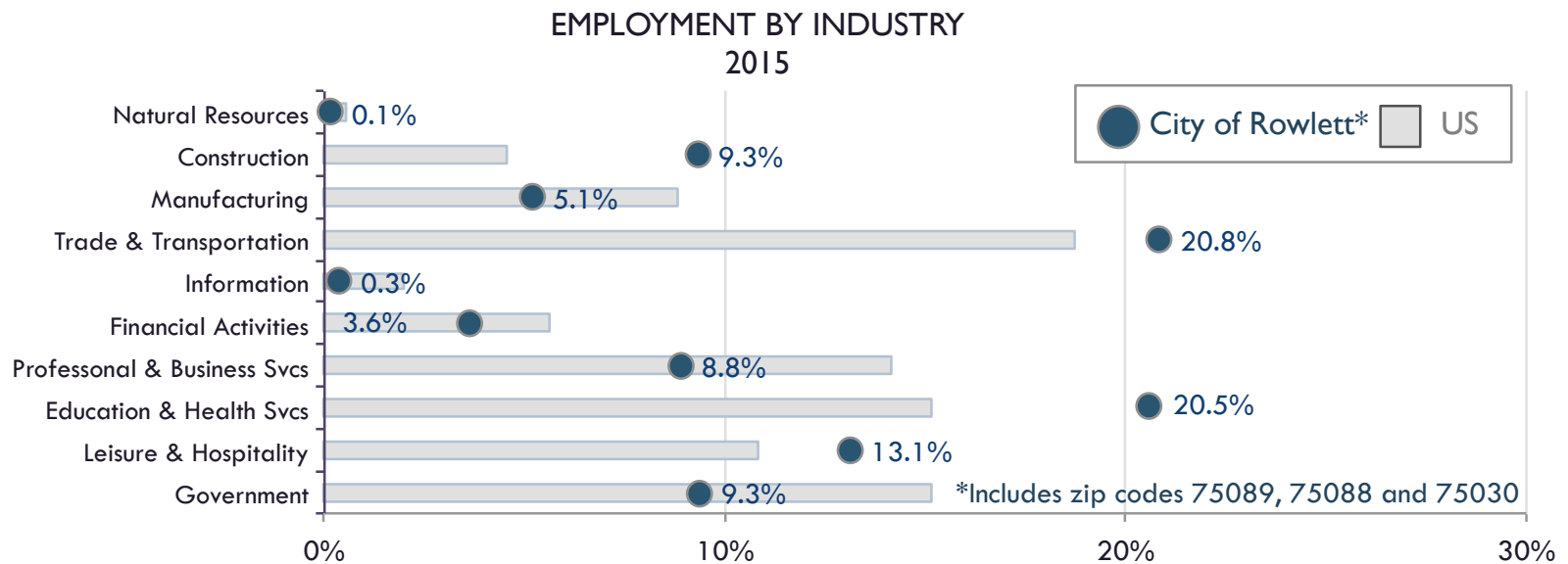
SOURCE: BUREAU OF LABOR STATISTICS / AVALANCHE CONSULTING

EMPLOYMENT BY INDUSTRY

WHY IS THIS IMPORTANT?

Employment composition provides insight into the economic diversification of a region. Initial examinations of employment are limited to government-defined industry classifications, such as Construction and Manufacturing. Subsequent analyses will examine more granular target industry clusters.

Employment in the City of Rowlett is dominated by two industries—Trade & Transportation and Education & Health Services. Together, these two sectors represent more than 40% of the city’s employment. Other leading areas of employment include Leisure & Hospitality (13.1%), Construction (9.3%), and Government (9.3%).



SOURCE: EMSI / AVALANCHE CONSULTING

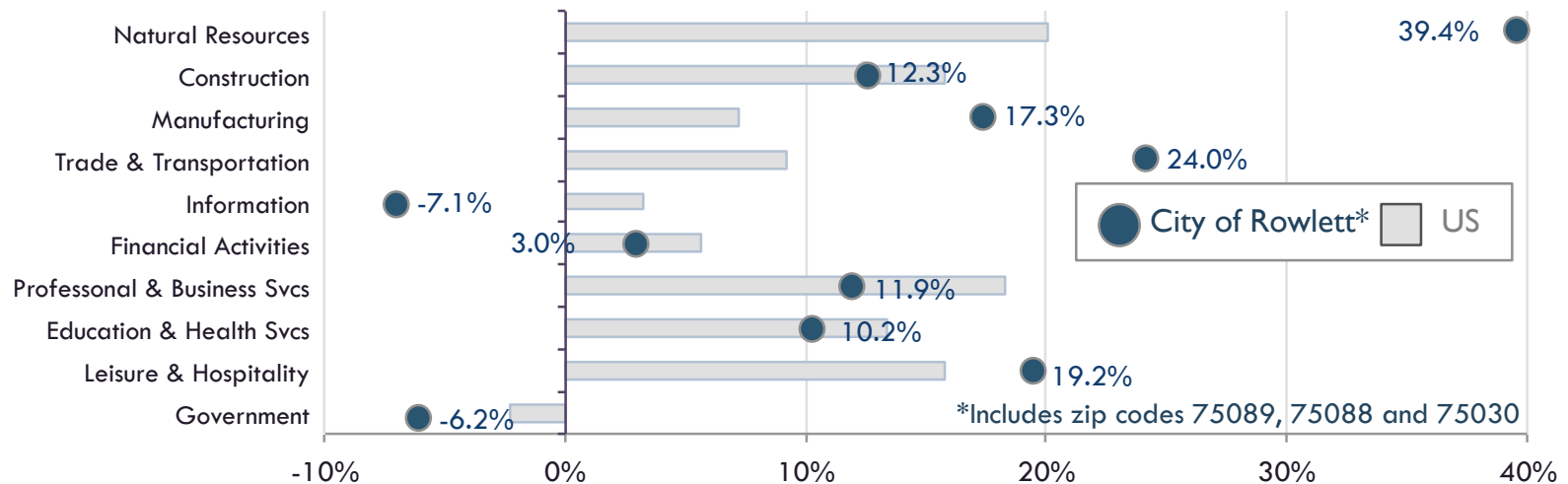
EMPLOYMENT CHANGE BY INDUSTRY

WHY IS THIS IMPORTANT?

The performance of individual employment sectors provides additional insight into potential competitive advantages within a region.

Between 2010 and 2015, nearly every private sector industry in the City of Rowlett experienced growth. Employment in Natural Resources increased nearly 40%, though this sector remains very small within the City of Rowlett. Trade & Transportation, Construction, Manufacturing, Professional & Business Services, Education & Health Services, and Leisure & Hospitality all enjoyed double-digit employment gains. Information employment, however, dipped 7%.

CHANGE IN EMPLOYMENT BY INDUSTRY 2010 - 2015



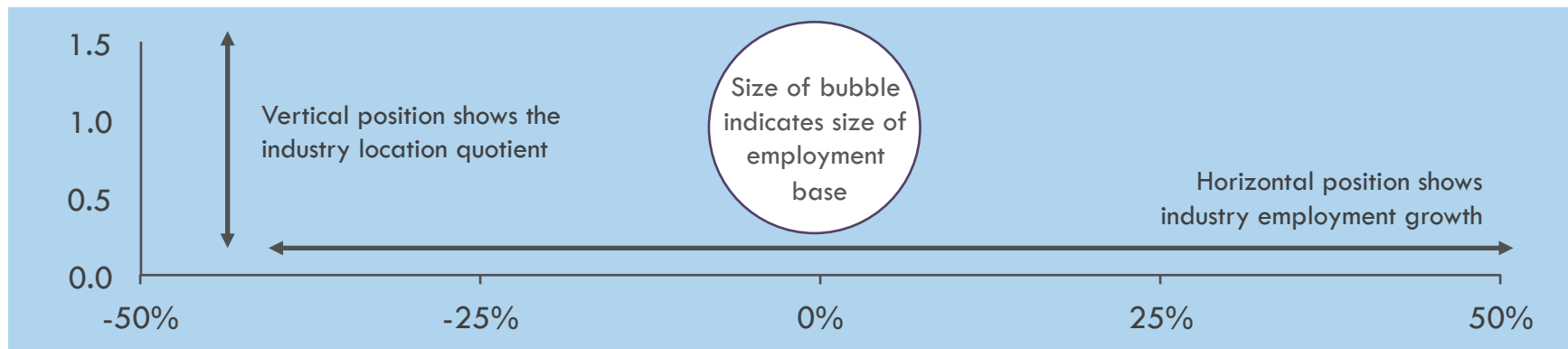
SOURCE: EMSI / AVALANCHE CONSULTING

EMPLOYMENT DYNAMICS BY INDUSTRY

WHY IS THIS IMPORTANT?

Location Quotients (LQ) calculate the relative employment concentration of industries in a community compared to the US average. An LQ of 1.0 indicates parity with the US average. An LQ higher than 1.0 is more concentrated than the US average while an LQ lower than 1 indicates an industry is less concentrated than the US average.

The bubble chart shows LQ by industry on the vertical axis. The horizontal axis shows growth rates for the industry. The size of the bubble indicates the employment base of the sector.

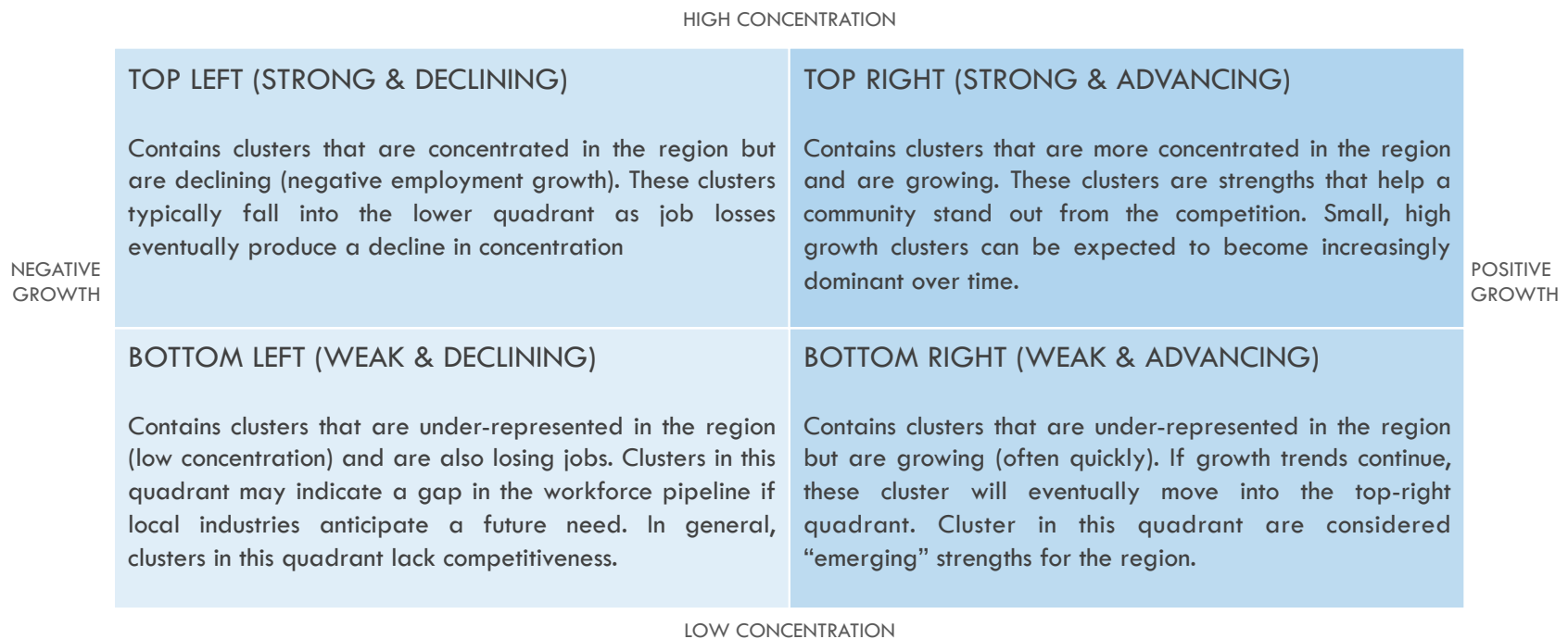


EMPLOYMENT DYNAMICS BY INDUSTRY

WHY IS THIS IMPORTANT?

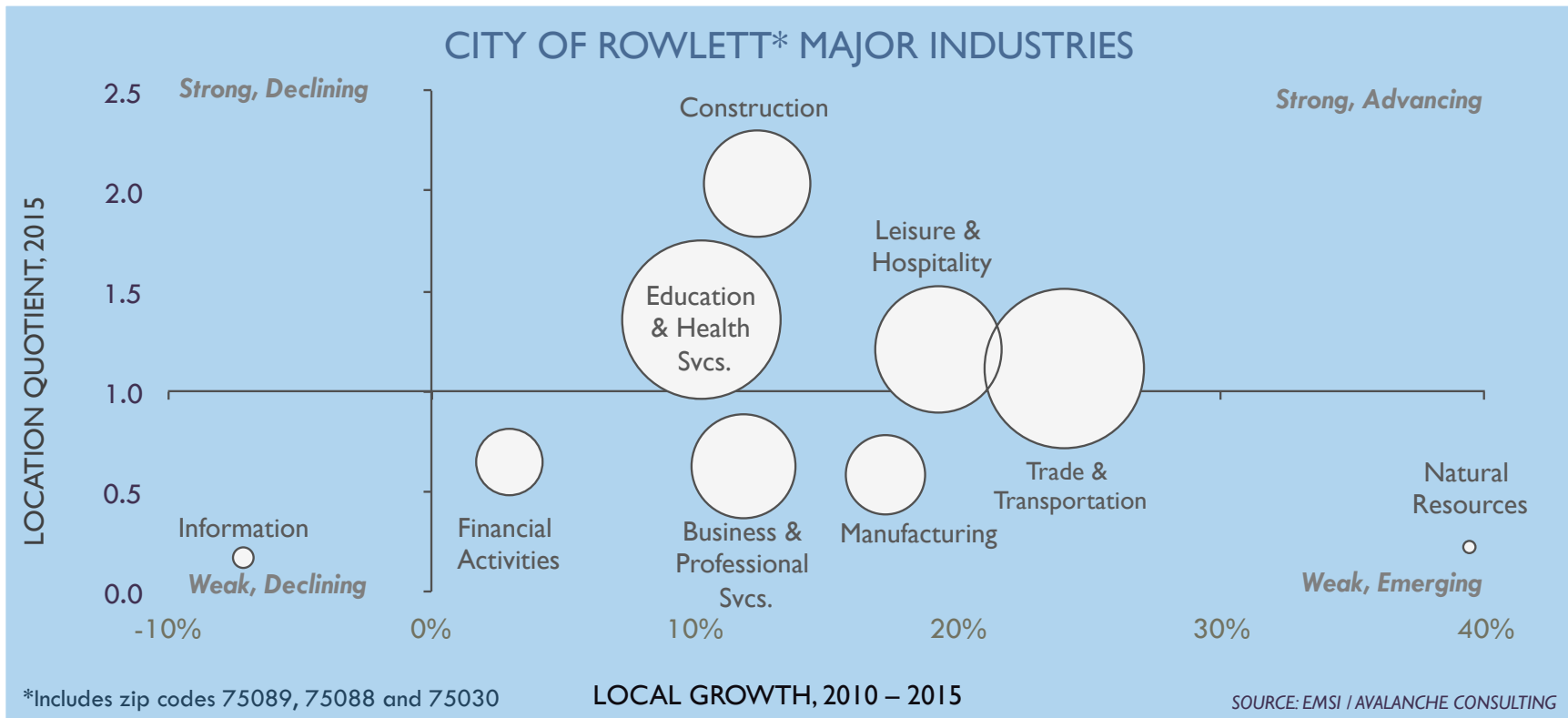
The graph's four quadrants tell a story for each industry sector.

Sectors in the top right quadrant are competitive and potential target audiences for economic development. Bottom right sectors, with growing but below-average concentrations, are emerging industries for the region. These industries are also potential economic development targets but need additional assistance to evolve, such as infrastructure investments or talent development.



With the exception of Information, every single industry cluster within the City of Rowlett added jobs between 2010 and 2015. Trade & Transportation employment increased approximately 25%, representing nearly 500 additional jobs. Other sectors that enjoyed strong employment growth included Leisure & Hospitality (250 jobs, 19% growth) and Education & Health Services (230 jobs, 10% growth).

With an LQ of 2.0, Construction is the most relatively concentrated employment sector within the City of Rowlett. Other relatively concentrated employment sectors include Education & Health Services (1.4 LQ), Leisure & Hospitality (1.2 LQ), and Trade & Transportation (1.1 LQ). All other employment sectors are less concentrated within the City of Rowlett relative to the US average.



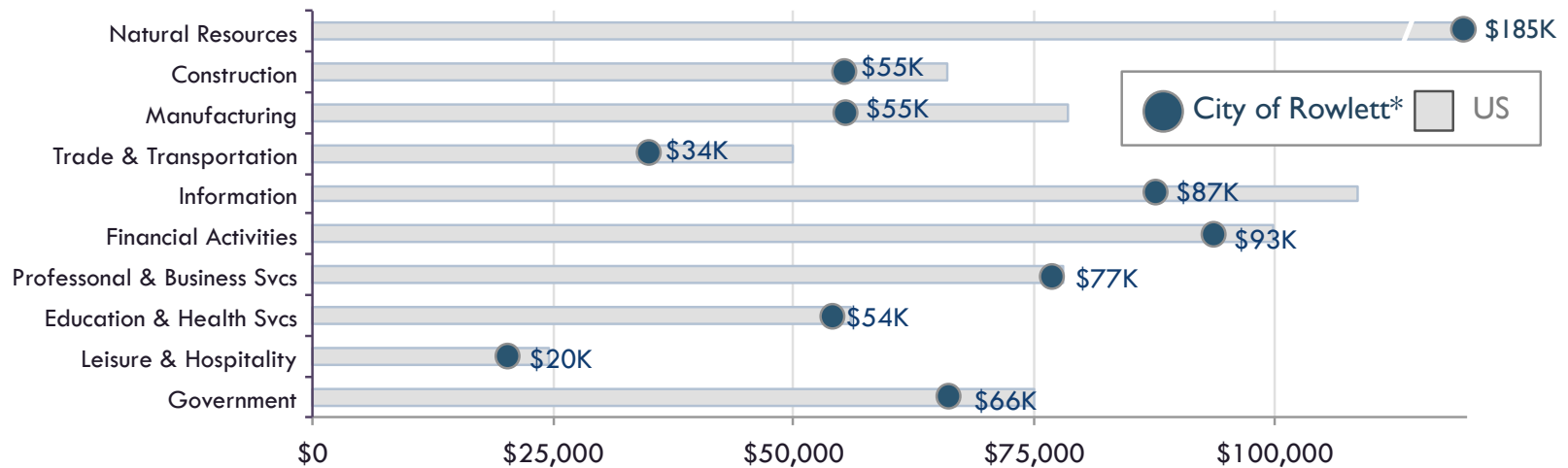
PAY BY INDUSTRY

WHY IS THIS IMPORTANT?

Some industries, eager to reduce their operating costs, are more attracted to regions with lower wages. Other companies, particularly in professional services, may place a premium on attracting more skilled workers regardless of costs.

Wages within the City of Rowlett are typically lower than the US. With the exception of Natural Resources, average wages across every industry sector within the City of Rowlett trail the US average. In some instances, such as Professional & Business Services and Leisure & Hospitality, these differences are minor. In others, including Information and Manufacturing, the wage differentials are more substantial.

AVERAGE ANNUAL PAY BY INDUSTRY
2013



*Includes zip codes 75089, 75088 and 75030

SOURCE: BUREAU OF LABOR STATISTICS / AVALANCHE CONSULTING

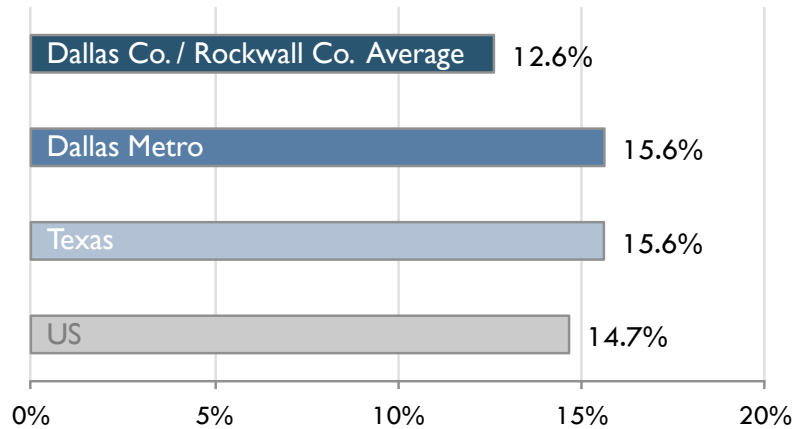
SELF-EMPLOYMENT

WHY IS THIS IMPORTANT?

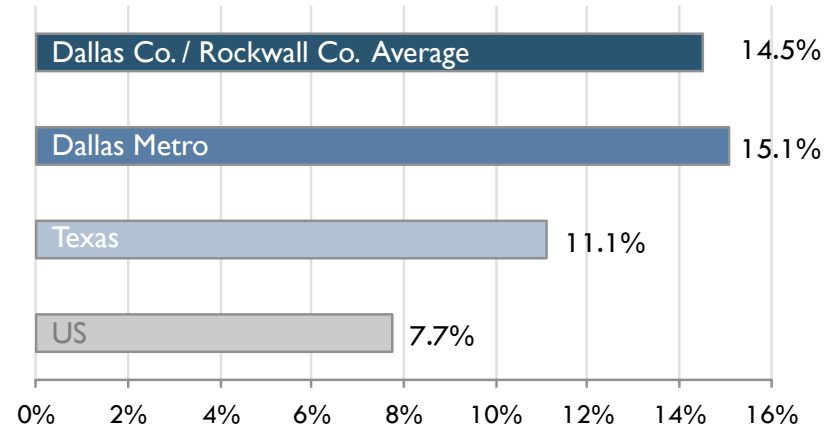
A community's share of self-employed individuals indicates its level of entrepreneurship. Both talent and businesses are drawn to regions with thriving entrepreneurial cultures.

As self-employment data is unavailable for the City of Rowlett, the Dallas County / Rockwell County average is used as a proxy. The self-employment rate for the Dallas County / Rockwell County area is less than the US average but growing nearly twice as fast.

SELF-EMPLOYED AS A % OF TOTAL EMPLOYMENT
2013



GROWTH IN SELF-EMPLOYED WORKERS
2008 - 2013



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

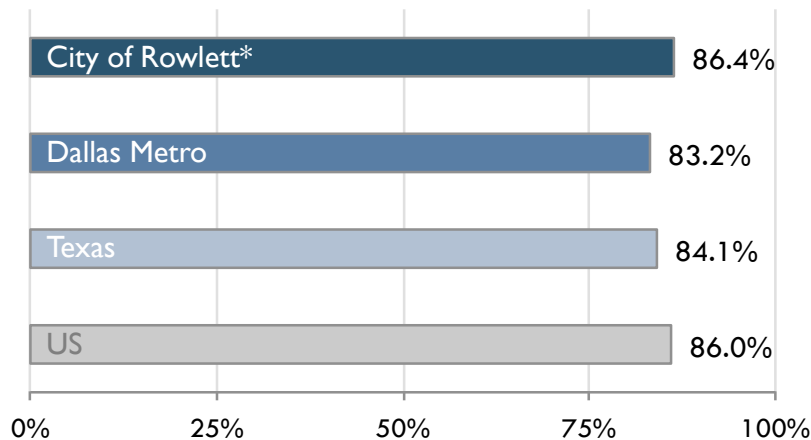
SMALL BUSINESS

WHY IS THIS IMPORTANT?

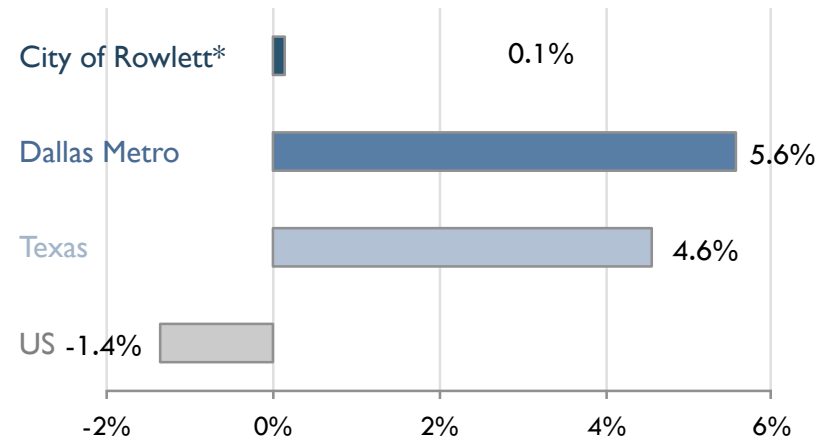
Small businesses with 20 or fewer employees encompass a host of operations, from family stores to high-tech startups and manufacturing operations. The Small Business Administration (SBA) reports that since 1990, small businesses have added eight million new jobs in the US, while big businesses have eliminated four million.

Approximately 86% of businesses within the City of Rowlett have 20 or fewer employees, identical to the US average and slightly higher than the Dallas metro and Texas averages. The number of small businesses within the City of Rowlett remained flat between 2008 and 2013. The number of small businesses in the US declined during this period, though both Texas and the Dallas metro enjoyed gains.

SMALL BUSINESSES RATE
(COMPANIES WITH <20 EMPLOYEES AS % OF TOTAL)



SMALL BUSINESSES GROWTH
(COMPANIES WITH <20 EMPLOYEES)
2008-13



SOURCE: FEDERAL BUREAU OF INVESTIGATION / AVALANCHE CONSULTING
*Includes zip codes 75089, 75088 and 75030

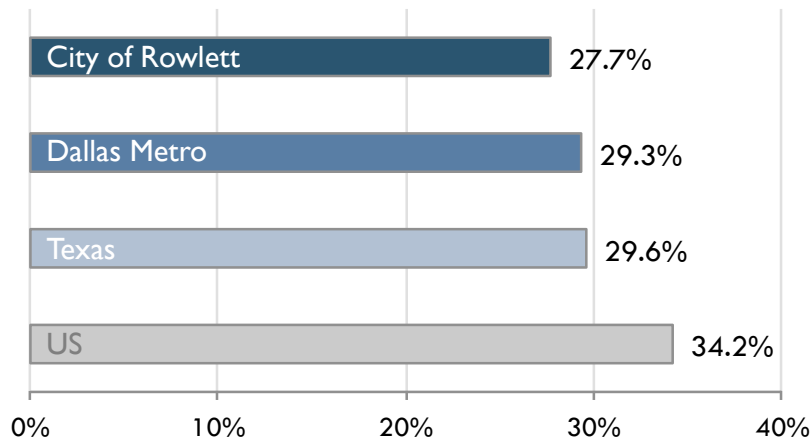
HOUSING COSTS & OWNERSHIP

WHY IS THIS IMPORTANT?

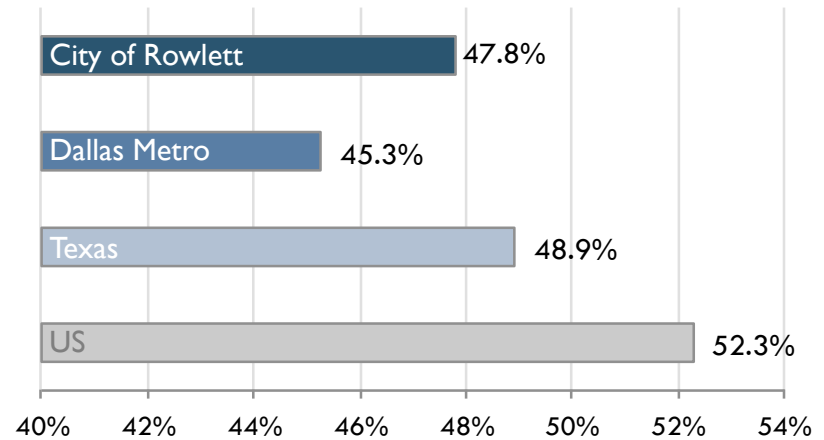
As housing costs are typically the single largest household expense, home prices are a key determinant of a region's relative affordability. Lower home values help reduce upward pressures on wages, further increasing a region's cost competitiveness.

Thanks to strong household income levels, the City of Rowlett has proportionally fewer cost burdened homeowners with a mortgage relative to the Dallas metro, Texas, and the US. However, nearly half of all renters in the City of Rowlett are cost burdened, slightly higher than the Dallas metro average.

HOMEOWNERS W/ MORTGAGE SPENDING MORE THAN 30% OF INCOME ON HOUSING COSTS, 2014



RENTERS SPENDING MORE THAN 30% OF INCOME ON HOUSING COSTS, 2014



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

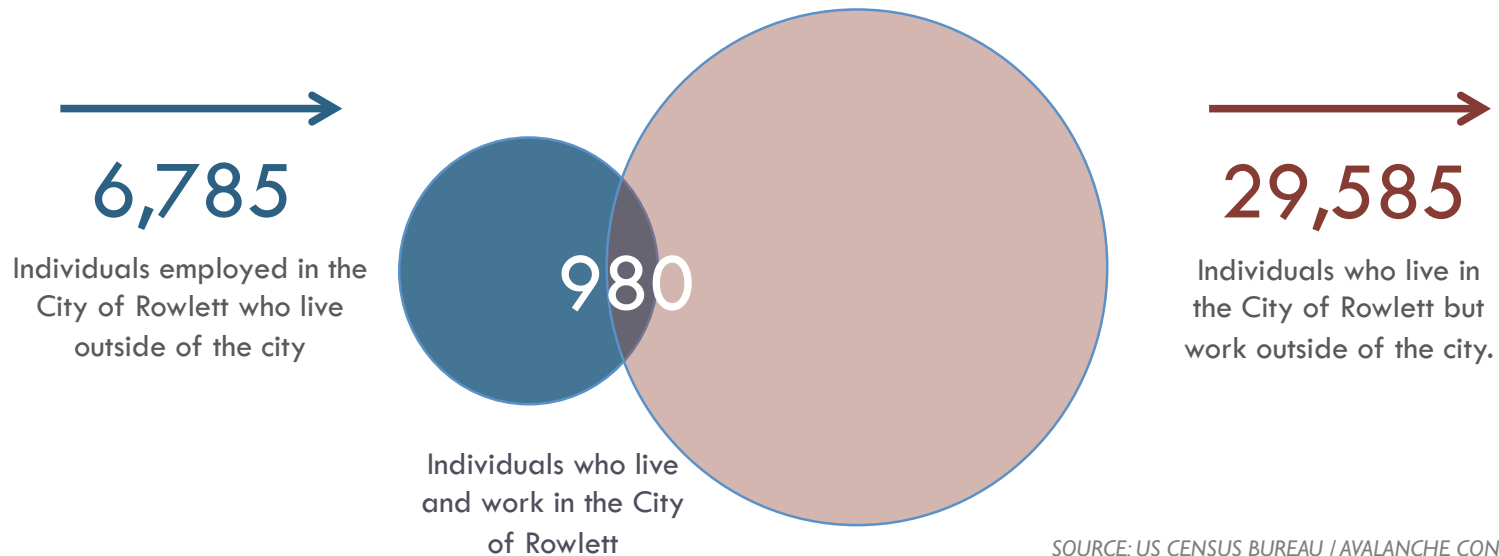
COMMUTING PATTERNS

WHY IS THIS IMPORTANT?

Commuting patterns play several important roles in a region's economy. Regions that can draw from the available talents and skillsets present outside of their communities can significantly increase their available workforce.

There is very little overlap between the people who live in the City of Rowlett and the people who work within the City of Rowlett. Nearly 97% of employed City of Rowlett residents work elsewhere. More than 87% of workers in the City of Rowlett come from other communities.

CITY OF ROWLETT COMMUTING PATTERNS 2013



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

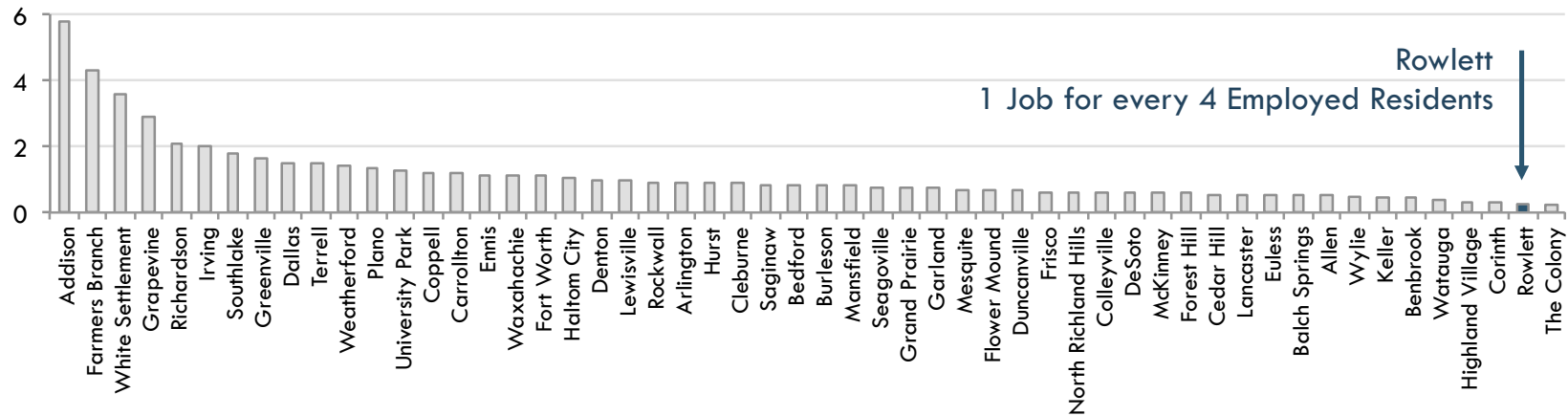
COMMUTING PATTERNS (continued)

WHY IS THIS IMPORTANT?

Commuting patterns play several important roles in a region's economy. Regions that can draw from the available talents and skillsets present outside of their communities can significantly increase their available workforce.

The City of Rowlett has one of the greatest imbalances between the number of residents within the community and the number of jobs within the community. There are approximately 4 workers living in the City of Rowlett for every 1 job within the city. Among the 54 cities within the Dallas metro with at least 10,000 residents, The Colony is the only city with a greater imbalance between jobs and workers.

RATIO OF EMPLOYMENT WITHIN A CITY TO EMPLOYED RESIDENTS



SOURCE: US CENSUS BUREAU / AVALANCHE CONSULTING

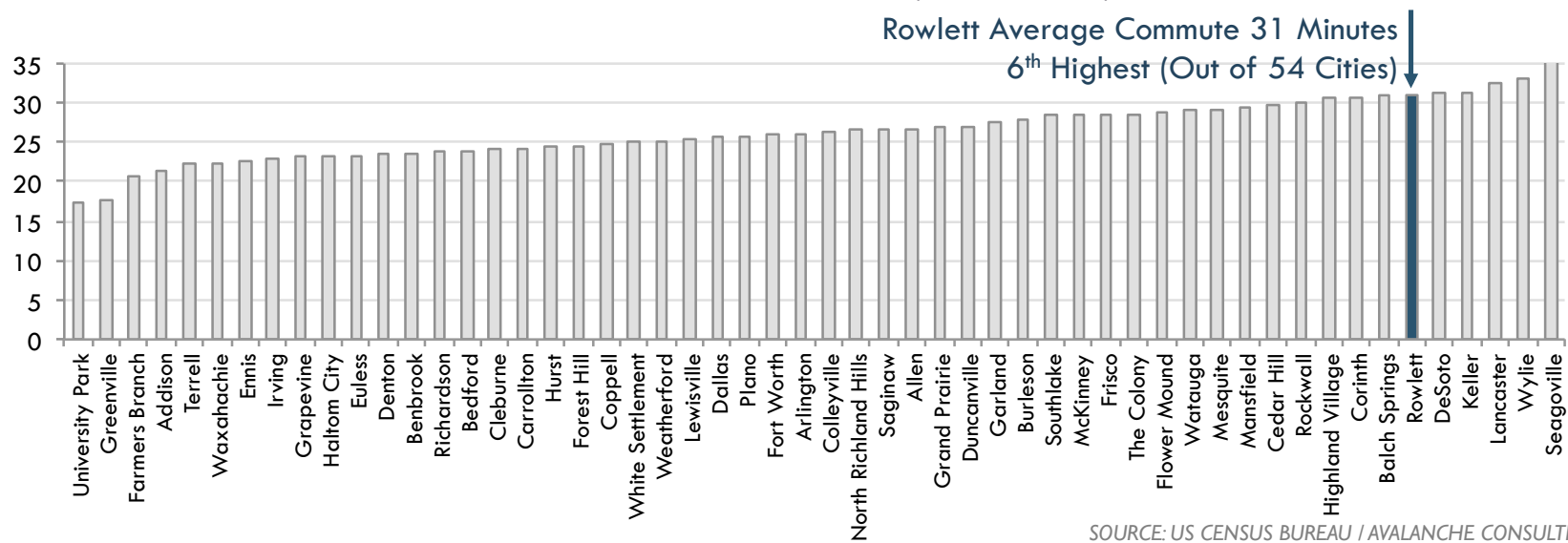
COMMUTING PATTERNS (continued)

WHY IS THIS IMPORTANT?

Commuting patterns play several important roles in a region's economy. Regions that can draw from the available talents and skillsets present outside of their communities can significantly increase their available workforce.

Commute times for Rowlett residents are among the longest in the Dallas metro. With an average commute of 31 minutes, City of Rowlett residents have the 6th longest commute among 54 cities in the Dallas metro with at least 10,000 residents.

AVERAGE TRAVEL TIME TO WORK (IN MINUTES), 2013

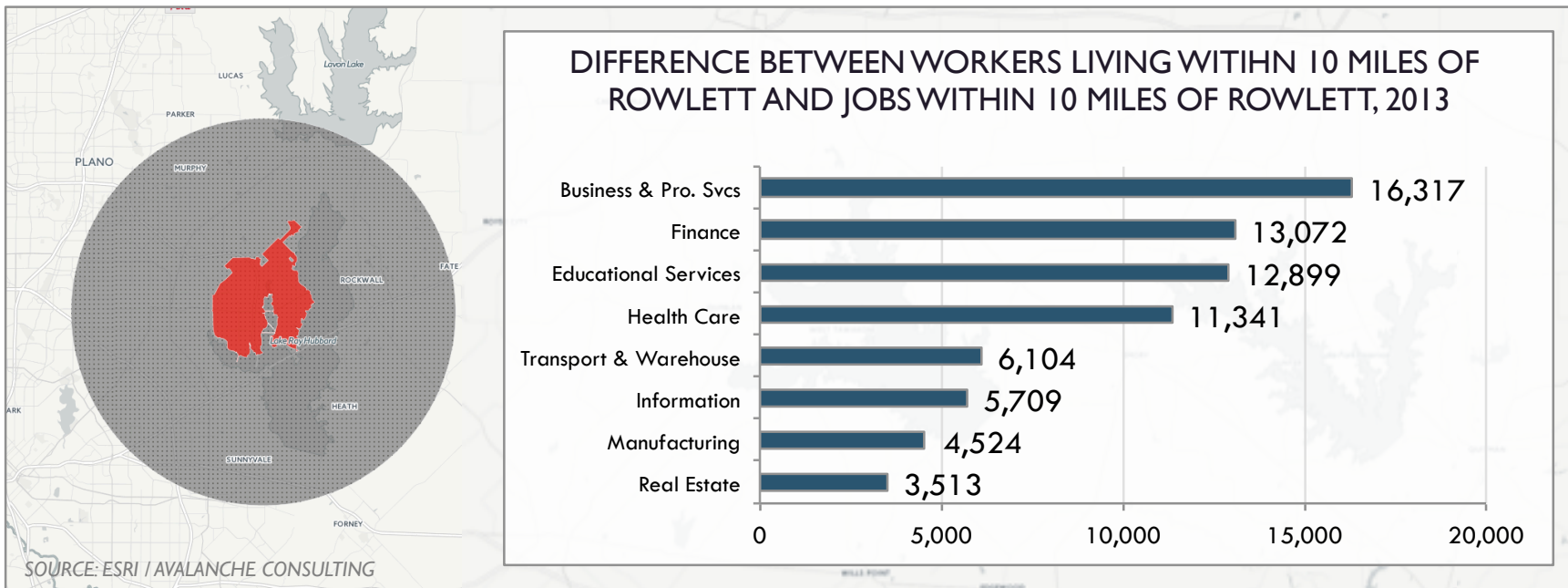


COMMUTING PATTERNS (continued)

WHY IS THIS IMPORTANT?

Commuting patterns play several important roles in a region's economy. Regions that can draw from the available talents and skillsets present outside of their communities can significantly increase their available workforce.

The City of Rowlett and surrounding communities are home to far more workers than jobs. While more than 286,000 workers reside within 10 miles of Rowlett, there are just 178,000 jobs within this area. The surplus of workers extends across virtually every industry.



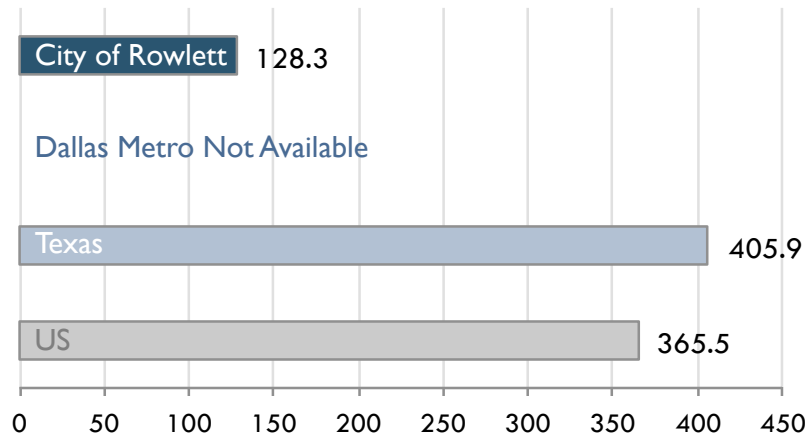
CRIME

WHY IS THIS IMPORTANT?

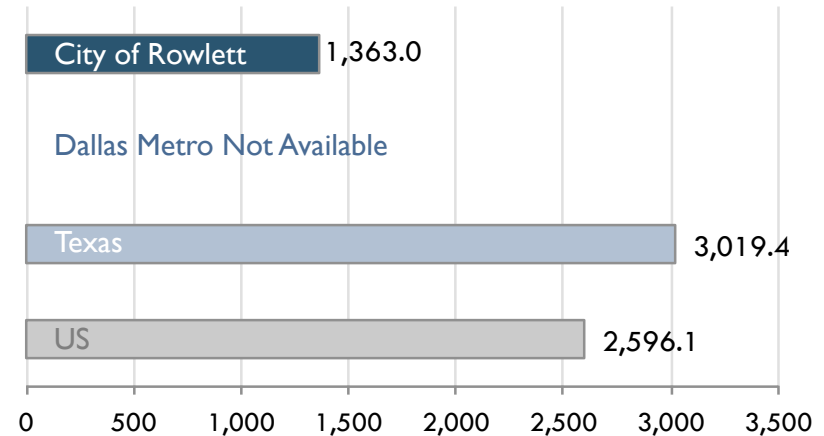
Actual and perceived crime rates play a significant role in location decisions for residents and businesses. Both individuals and companies want to invest in communities where their physical and material being is assured.

The City of Rowlett is a very safe community. The City's violent crime rate is less than a third of the Texas average. The City of Rowlett's property crime rate is barely half the US average.

VIOLENT CRIME PER 100K RESIDENTS
2014



PROPERTY CRIME PER 100K RESIDENTS
2014



SOURCE: FEDERAL BUREAU OF INVESTIGATION / AVALANCHE CONSULTING

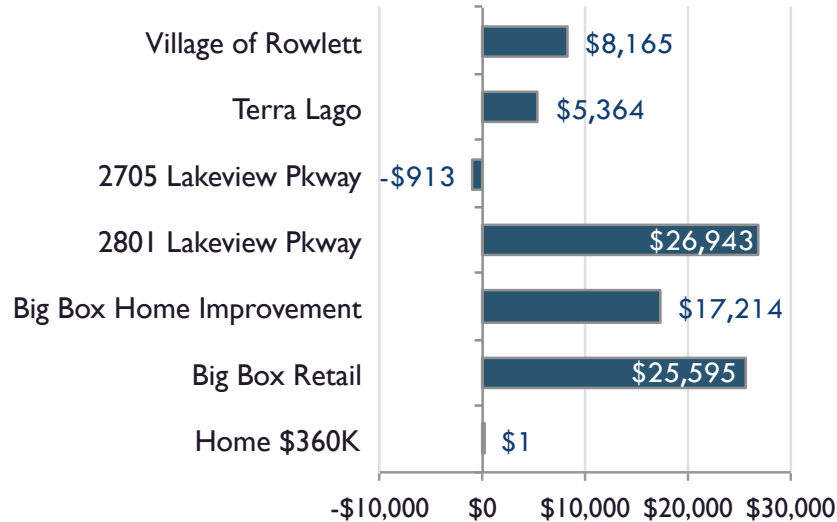
TAX REVENUE BY LAND USE

WHY IS THIS IMPORTANT?

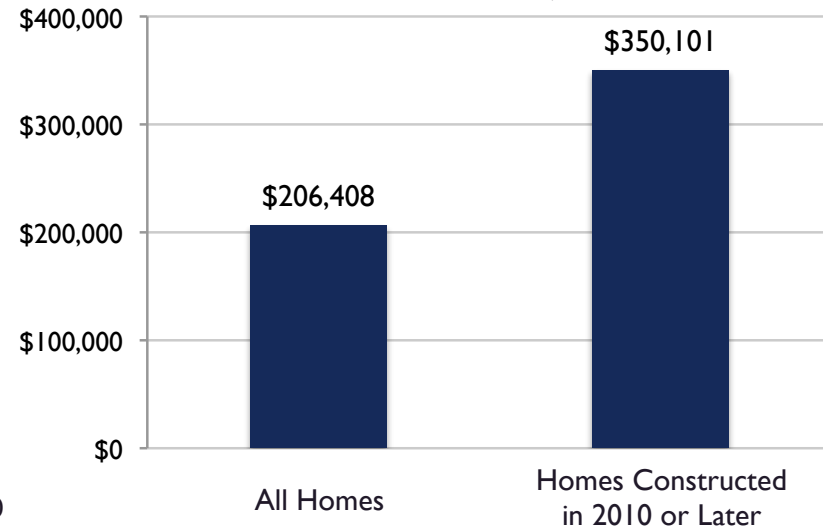
From a taxing perspective, not all development types are equal. Residential development, for example, typically requires significant supporting services while generating relatively modest tax revenues. Commercial and industrial development, on the other hand, typically produces a net gain in revenues.

According to a fiscal impact analysis conducted by Ricker Cunningham for the City of Rowlett, a home valued at \$360,000 produces virtually no revenue on a per acre basis once service cost are considered. In 2015, the average home in the City of Rowlett sold for little more than \$200,000. Although newer homes sell at a premium, the average sales price remains less than \$360,000.

NET SURPLUS/DEFICIT PER ACRE BY LAND USE



AVERAGE LIST PRICE OF HOMES SOLD IN CITY OF ROWLETT, 2015



SOURCE: RICKER / CUNNINGHAM / REDFIN / AVALANCHE CONSULTING

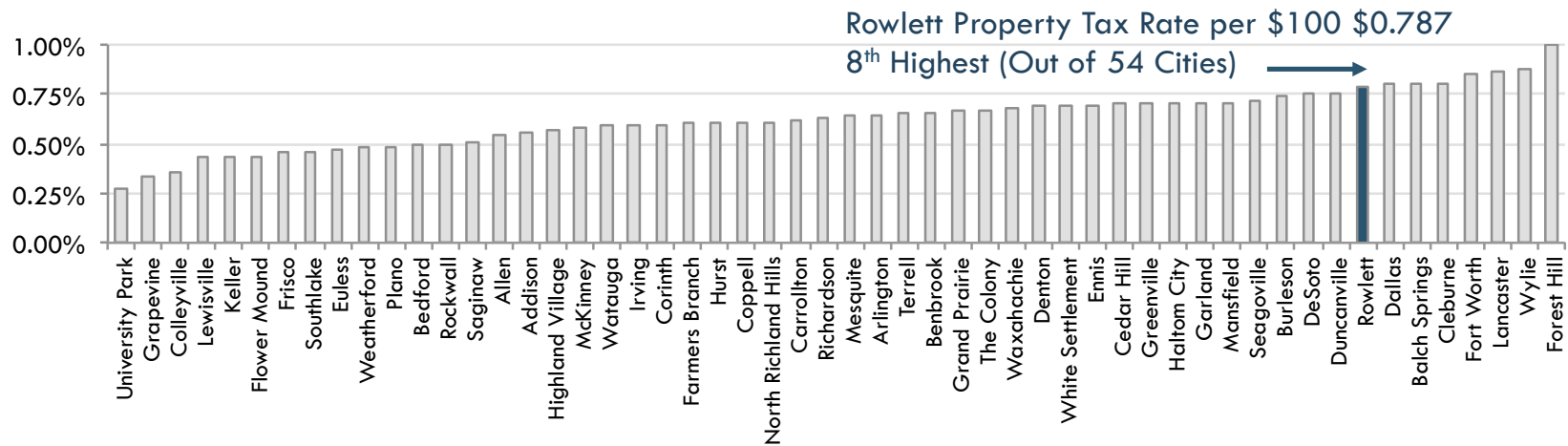
PROPERTY TAX RATE

WHY IS THIS IMPORTANT?

Local property tax rates can play a significant role in a community's ability to recruit companies in capital-intensive industries such as Manufacturing. A high property tax rate may also reflect a lack of commercial and industrial development.

In 2015, The City of Rowlett's property tax rate was \$0.787 for every \$100 of valued property. Within the Dallas metropolitan area, which includes 54 cities with population of at least 10,000, the City of Rowlett has the 8th highest city property tax rate.

CITY PROPERTY TAX RATE, 2015
(ALL CITIES IN LOCATED WITHIN DALLAS METRO WITH AT LEAST 10,000 RESIDENTS)



SOURCE: TEXAS COMPTROLLER / AVALANCHE CONSULTING

REGIONAL EMPLOYMENT GROWTH

WHY IS THIS IMPORTANT?

Regional employment growth trends often influence recruitment and retention strategies at the local level. As regional economies expand geographically, new opportunities often emerge for outlying communities.

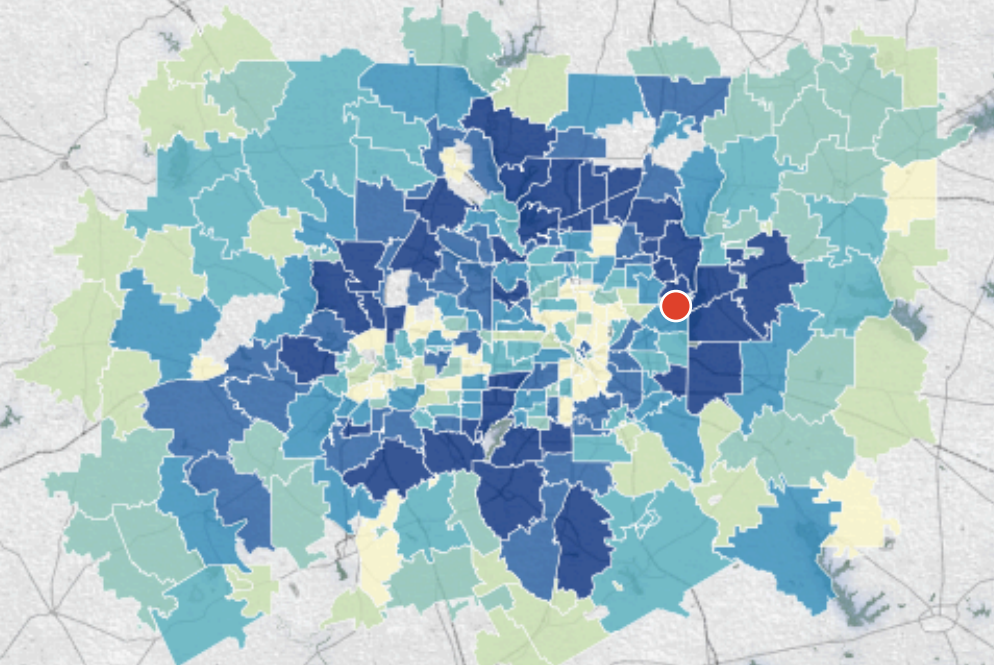
Although the City of Dallas remains the most concentrated employment node within the metropolitan area, communities located along the periphery of the Dallas urban core have experienced the greatest level of employment growth since 2000. Employment growth has been heavily concentrated along existing transportation infrastructure, especially I-635.

DALLAS METRO POPULATION GROWTH BY ZIP CODE, 2000 - 2013

KEY

MORE GROWTH

LESS GROWTH



SOURCE: EMSI / AVALANCHE CONSULTING

REGIONAL POPULATION GROWTH

WHY IS THIS IMPORTANT?

Population growth is typically more decentralized than employment growth within a metropolitan area. Residents in seek of affordable housing often migrate to bedroom communities that provide labor to communities located closer to the urban core. Over time, however, many bedroom communities mature into employment centers.

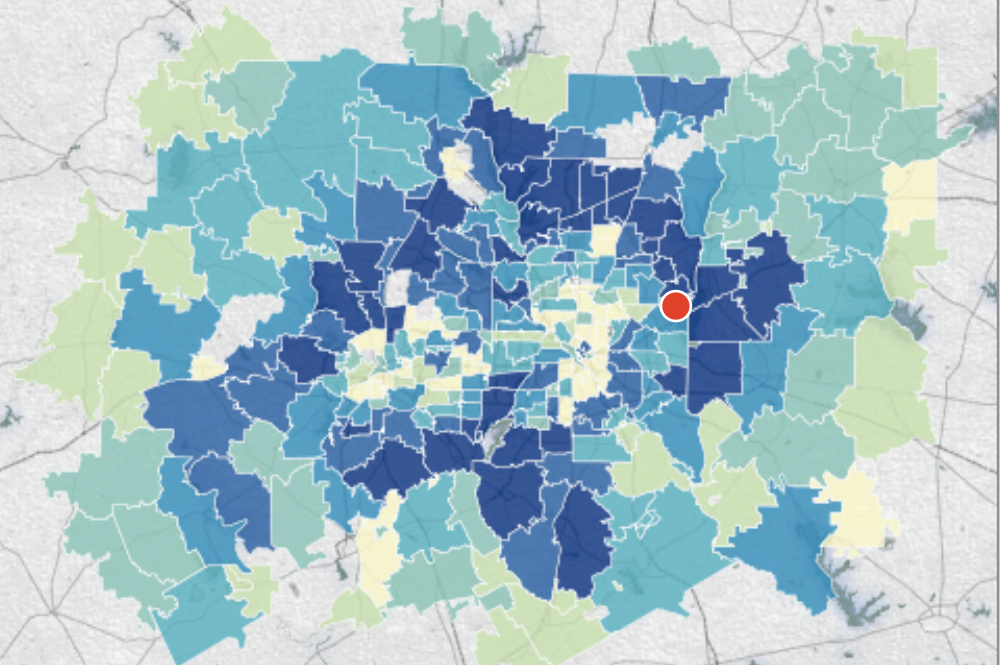
While outlying communities within the Dallas metro area enjoyed some of the highest levels of employment growth between 2000 and 2013, many of these localities experienced even greater rates of population growth. As a result of these trends, many communities such as Rowlett now have far more residents than jobs.

DALLAS METRO POPULATION GROWTH BY ZIP CODE, 2000 - 2013

KEY

MORE GROWTH

LESS GROWTH



SOURCE: EMSI / AVALANCHE CONSULTING



TARGET INDUSTRY IDENTIFICATION

The second section of the report identifies Rowlett's recommended target industries. The target list includes broad industry descriptions as well as recommended niche sectors.



TARGET SELECTION PROCESS

In an era of limited organizational and financial resources, economic developers must prioritize their activities accordingly. Focusing efforts on industries with the greatest local competitive advantage, growth levels, and wealth generating potential helps fully leverage every dollar of investment. Targeting also triggers cluster development in which employers, their suppliers, and support functions tend to locate closely together to share assets like talent and infrastructure.

A target industry initiative yields even greater results when it is integrated with the efforts of aligned organizations and agencies, including educational curricula, workforce development programs, public policy decisions, and infrastructure investments. Coordination demonstrates that area leaders are committed to the long-term success of new and existing businesses, further increasing the attractiveness of a community as a place to live and conduct business.

Targeting a particular industry does not preclude growth in other sectors. Growing target industries generate additional revenue into the community, boosting residents' spending power. Every sector benefits from heightened business activity, new income, new residents, and new spending that results from investments in a target industry cluster.

TARGET SELECTION PROCESS

Target selection is an iterative process that integrates a variety of quantitative and qualitative information. When identifying targets, Avalanche Consulting considers four questions:

What industries are forecast to grow?

An examination of national industry trends helps place local employment performance within a broader context.

What industries have an existing presence in the city and region?

The second step of target identification involves examining local economic dynamics, including existing regional cluster concentrations.

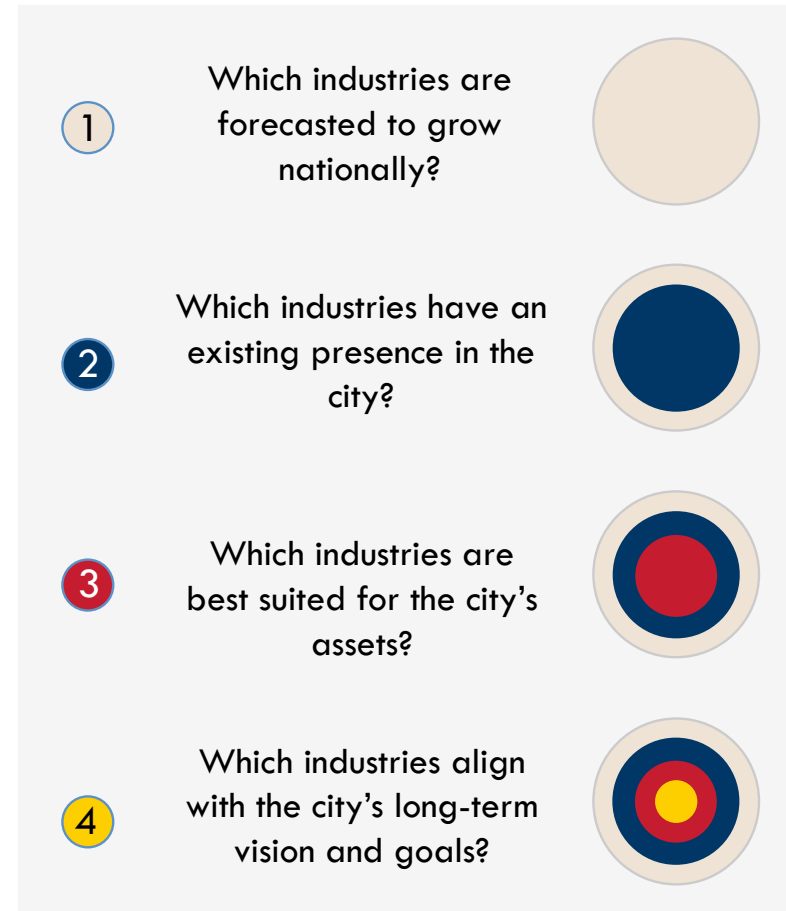
Which industries are best suited to the North Shore District's assets?

The *Competitive Assessment* examined local competitive strengths through research on the community and region. The process identified regional assets that can support future employment growth.

Which industries align with the city's long-term visions and goals?

Selected target industries must also reflect local values. Conversations with local stakeholders help the consulting team articulate the community's vision for itself and supporting goals that the economic development strategy should help realize.

The target selection process will ultimately result in the selection of target industries that align with local competitiveness.



TARGET RECOMMENDATIONS

The following target industries have been selected after a careful review of local and national trends, competitive assets, and community vision:

ADVANCED MANUFACTURING

Manufacturing involves transformation of raw materials into component pieces and finished products. After decades of employment losses, Advanced Manufacturing in the US has rebounded in recent years. Advanced Manufacturing is aggressively recruited by many communities due to the industry's relatively high wages and large capital expenditures. Although Advanced Manufacturing employment within the Dallas region has remained largely flat in recent years, Rowlett's Advanced Manufacturing base continues to grow. Between 2010 and 2015, Advanced Manufacturing employment within the city increased 16%. In addition, the North Shore District will provide large-acreage tracts that will be a competitive advantage for this sector.

BUSINESS & PROFESSIONAL SERVICES

Business & Professional Services encompasses a variety of technical and business-related sectors, including accounting, architecture, advertising, consulting, engineering, information technology, and a many others. Business & Professional Services typically cluster in regions rich with talent and potential clients. Business & Professional Services has been integral to the current economic vibrancy of the Dallas region; between 2010 and 2015, Business & Professional Services employment within the metro increased nearly 25%.

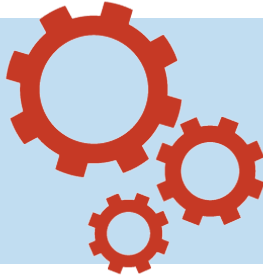
EDUCATIONAL SERVICES

Educational Services includes instruction and training in a variety of settings, ranging from primary schools to post-secondary institutions such as technical schools and universities. Strong population growth in the Dallas region, the rise of the Millennial generation, and a labor market increasingly favoring skilled workers will all contribute to significant Educational Services employment growth in the years to come. Services employment within the Dallas, for example, is projected to increase 15% through 2020. One challenge for Rowlett is to capture a greater share of these gains.

HEALTH CARE & LIFE SCIENCES

The Health Care industry spans everything from hospital medical care to outpatient care to urgent care. The Life Sciences industry focuses on the development of many of the tools used by the Health Care industry to improve health outcomes. Thanks to technological innovation and demographically driven demand, the Health Care & Life Sciences industry continues to post consistent employment growth. As the US population continues to age, this trend is likely to continue for the next decade or two. Through 2020, Health Care & Life Sciences employment within Rowlett is anticipated to increase approximately 25%.

ADVANCED MANUFACTURING



— NICHE SECTORS —

FABRICATED METAL & EQUIPMENT MFG.

MACHINERY MFG.

COMPUTER & ELECTRONIC MFG.

About the Industry

Manufacturing encompasses activities that transform raw materials into component pieces and finished products. Manufacturing is among the most heavily recruited by communities throughout the US as a result of the industry's substantial capital investments and high average wages. The complex and costly machinery associated with Advanced Manufacturing often generates considerable property tax revenues. Advanced Manufacturing jobs are characterized by relatively high wages due to the specialized skills and training required to operate advanced machinery.

A generation ago, factors such as increased automation and offshoring contributed to a steady and substantial decline in US manufacturing. The recent economic collapse marked the nadir of the industry's fortunes. In the years since, Advanced Manufacturing has rebounded. US manufacturers have added nearly 900,000 workers to their payrolls since January 2011. Advanced Manufacturing firms that survived the great recession have become increasingly efficient thanks to a combination of technology and a highly skilled workforce. Domestic Manufacturing operations have also benefitted from lower domestic energy costs, rising overseas labor costs, and growing concerns about protecting intellectual property.

Advanced Manufacturing operations are attracted to locations with a skilled, low-cost workforce and plentiful, competitively-priced energy supplies. Many Advanced Manufacturing niche sectors also require significant and competitively priced water and wastewater capacity. Rail access can be critical to delivering raw materials while uncongested roadways are necessary to deliver finished goods. Large scale manufacturing operations will often seek communities with competitive incentive packages, especially property tax abatements and/or free land.

Advanced Manufacturing target niche sectors identified for Rowlett's North Shore District include:

- Fabricated Metal & Equipment Manufacturing
- Machinery Manufacturing
- Computer & Electronic Manufacturing

Why the North Shore District?

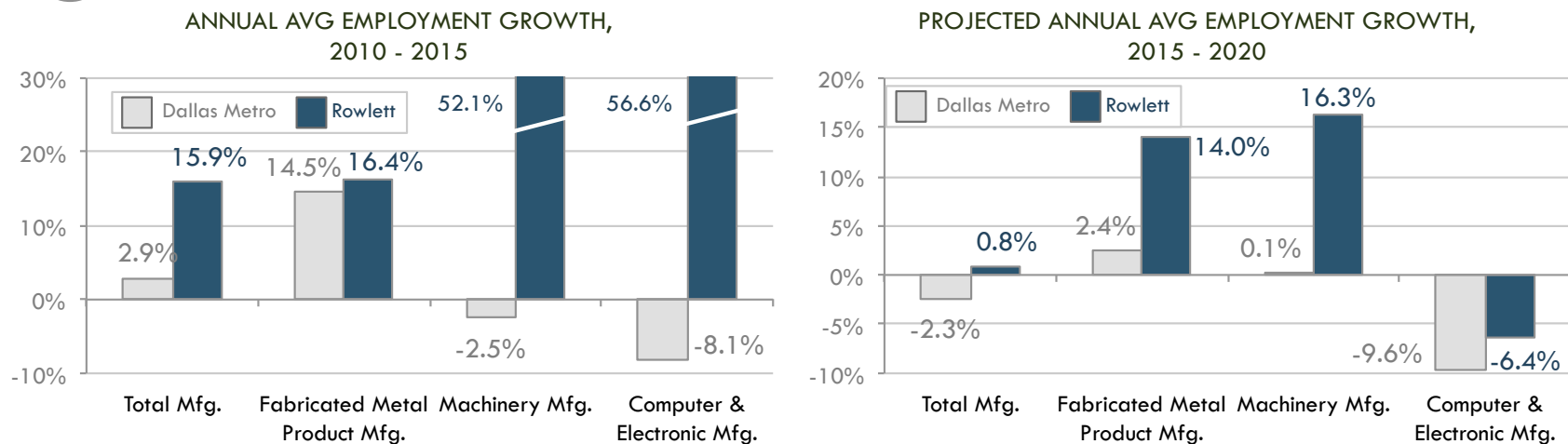
The Dallas region has a rich tradition of manufacturing, with specific competencies in areas such as aerospace, electronics, and metal products manufacturing. Historically, the region's manufacturing prowess has been concentrated in several communities adjacent to Rowlett, especially Garland. Despite the industry's significant local presence, manufacturers can't fully absorb the available workforce—there are approximately 4,500 more manufacturing workers residing within Rowlett and surrounding communities than actual manufacturing jobs. As a result, manufacturers expanding within or relocating to Rowlett will find a deep pool of skilled workers.

Since 2010, Manufacturing employment within Rowlett has increased approximately 16%, outperforming the performance of both the broader Dallas region's Manufacturing base as well as total employment within the City of Rowlett. Manufacturing employment within Rowlett is expected to experience modest growth in the years ahead, though several niche sectors are projected to enjoy significant gains. Metal product manufacturing and machinery manufacturing are projected to experience double-digit employment growth through 2020.

If recent history is any indication, Rowlett may outperform current forecasts. Development of the North Shore District would likely further accelerate manufacturing growth within the city. Past manufacturing growth within Rowlett has been constrained by a lack of available sites and buildings. The city's current industrial parks, for example, are near full capacity. Development of the North Shore District would provide Rowlett with the capabilities to support large-scale manufacturers, as well as existing manufacturing firms looking to expand their operations locally.



REGIONAL & LOCAL ADVANCED MANUFACTURING INDUSTRY DYNAMICS



SOURCE: Avalanche Consulting / EMSI

BUSINESS & PROFESSIONAL SERVICES



— NICHE SECTORS —

FINANCE & INSURANCE
PROFESSIONAL & TECHNICAL SERVICES
ADMINISTRATIVE SUPPORT SERVICES
CORPORATE HEADQUARTERS

About the Industry

The Business & Professional Services industry cluster encompasses a broad range of professional, technical, and business services sectors. The cluster is characterized by a variety of positions, including architecture, accounting, engineering, finance, and legal occupations.

Despite a brief period of contraction during the recession, the Business & Professional Services cluster has been a dominant driver of employment growth in the US for several decades. The cluster has also rebounded strongly during the economic recovery. During the past five years, Business & Professional Services employment gains have outperformed the US average by nearly 50%. National gains, however, have been far from even. Regions with concentrated Finance sectors, for example, have experienced only modest Business & Professional Services employment gains. In Texas, however, Business & Professional Services employment has increased 20% since 2009.

Unlike other industry clusters such as Advanced Manufacturing, Business & Professional Services firms typically have minimal infrastructure requirements beyond office space, broadband availability, and access to a major airport. Business & Professional Services are also attracted to locations rich with market opportunities, lifestyle amenities, and a robust talent pipeline. Legal and architecture firms, for example, thrive in regions with a large customer base. Business & Professional Services also rely heavily on an educated workforce. Communities with a strong quality of life help Business & Professional Services recruit skilled workers while the presence of nearby higher education institutions assures that employers will be able to secure the workers necessary to maintain and expand operations.

Business & Professional Services occupations are characterized by high degrees of specialization and many positions require a bachelor's degree (at minimum). As a result, the Business & Professional Services workers are often well compensated. In 2015, the average Business & Professional Services salary in Rowlett totaled nearly \$75,000 annually.

Business & Professional Services target niche sectors identified for Rowlett's North Shore District include:

- Finance & Insurance
- Professional & Technical Services
- Administrative Support Services
- Corporate Headquarters

Why the North Shore District?

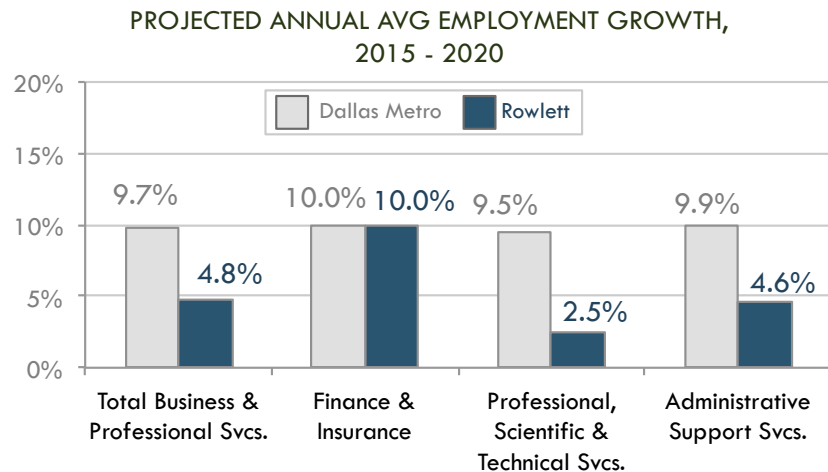
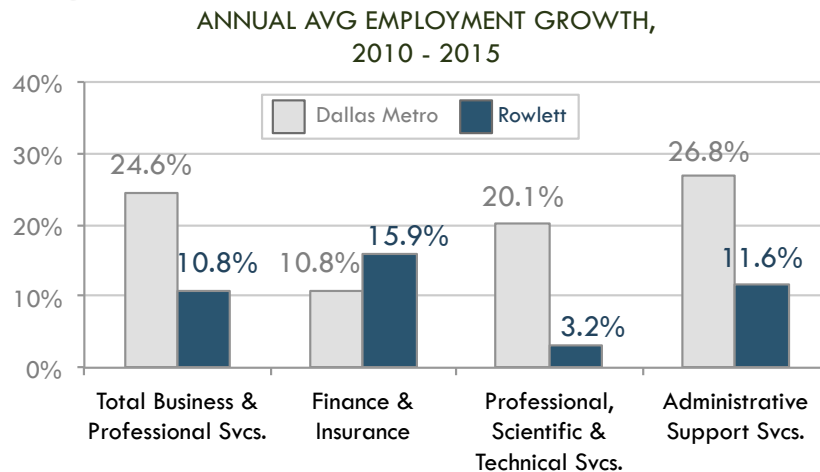
The Dallas region is a Business & Professional Services powerhouse. Between 2009 and 2014, Business & Professional Services employment in the Dallas metro increased at twice the rate of the industry's growth within the US. Today, Dallas is among the first choice for companies looking to relocate a corporate headquarters or establish a regional office. The Dallas metro ranks fourth among all US regions in Fortune 500 headquarters. Toyota's new US headquarters in Plano will only further enlarge the region's corporate headquarters presence.

Rowlett is already home to a small but growing Business & Professional Services sector. Between 2010 and 2015, Business & Professional Services employment increased nearly 11%, with all niche sectors experiencing growth. Business & Professional Services employment within Rowlett is expected to continue growing through 2020, though current employment forecasts are more muted than recent growth trends.

Rowlett remains well positioned for additional Business & Professional Services employment. The city and surrounding communities possess the workforce required to support additional Business & Professional Services operations. Rowlett's population is well-educated and augmented by residents in adjacent communities. Within a 10-mile radius of Rowlett, there are 29,000 more residents employed in Business & Professional Services and Finance industries than actual Business & Professional Services and Finance jobs. What Rowlett has historically lacked, however, is compelling locations for Business & Professional Services operations. The North Shore District, combined with the completed President George Bush Turnpike, provides the real estate and infrastructure to help attract these firms.

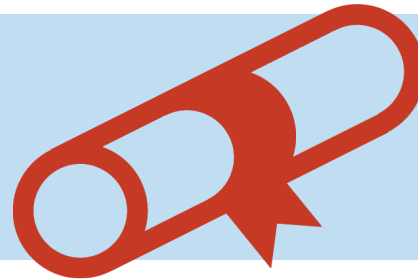


REGIONAL & LOCAL BUSINESS & PROFESSIONAL INDUSTRY DYNAMICS



SOURCE: Avalanche Consulting / EMSI

EDUCATIONAL SERVICES



NICHE SECTORS

SECONDARY INSTRUCTION

POST-SECONDARY INSTRUCTION

About the Industry

Educational Services includes instruction and training across a variety of subjects and levels, from primary schools to post-secondary institutions such as technical schools and universities. Educational Services establishments may be publicly or privately owned and operated.

Educational Services has posted consistent employment gains in recent years. During the past decade, Educational Services employment in the US increased more than any industry except Energy and Health Care. Growth has been fueled by combination of demographic and economic forces. Millennials, which includes individuals between the ages of 18 and 34, are the largest generational cohort since the Baby Boomer generation. The size and relative youth of this generation has fueled sustained demand for Educational Services at all levels. An employment environment that places greater emphasis on educational attainment has complimented these demographic trends. From Advanced Manufacturing to Business & Professional Services, a growing number of positions across all industries require some level of post-secondary education. The result has been an explosion of the college-educated population in the US—between 2000 and 2014, the number of Americans with an associate degree, bachelor’s degree, or graduate degree increased nearly 50%.

The demographic and economic trends driving the growth of Educational Services are even more amplified in Texas. In addition to being one of the fastest growing states in the US, it is also among the youngest. Half of all Texans are younger than 35. Though Texas has significantly increased talent production in recent years, these gains have not kept pace with the Lone Star State’s phenomenal employment growth. Between 2009 and 2014, for example, both Texas and California created approximately 1.2 million jobs. The number of post-secondary degrees awarded in Texas, however, was just 60% of California levels. Texas has been able to remain competitive as a place to do business thanks in part to its ability to attract educated residents living outside the state. Such a strategy, however, has its limits. Last year, for example, the Federal Reserve in Dallas reported companies in industries as varied as construction, financial services, and law “continue to note difficulty in finding skilled workers.” If Texas is to sustain its economic vibrancy, the state must continue to increase talent production.

Educational Services target niche sectors identified for Rowlett’s North Shore District include:

- Secondary Instruction
- Post-Secondary Instruction

Why the North Shore District?

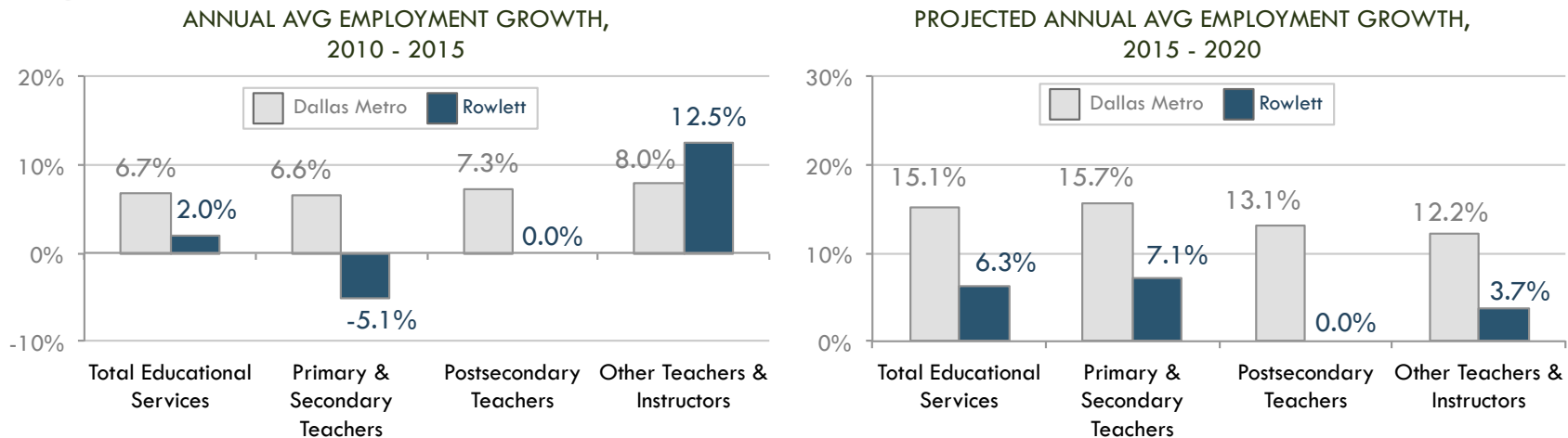
The Dallas region produces relatively few college graduates relative to its employment growth. In 2012, for example, the Dallas region created 3.5 jobs for every college degree awarded locally. Among the 10 largest metropolitan areas in the US, only Houston has a greater imbalance between recent employment gains and local talent production.

With the Dallas region continuing to enjoy sustained job growth, the need for additional Educational Services is greater than ever. From 2010 and 2015, Educational Services employment within the Dallas region increased less than 7%. Current projections for the Dallas region anticipate a 15% increase in Educational Services employment through 2020. Although forecasts for Rowlett remain more muted, at approximately 6%, the city remains well positioned to capture additional Educational Services employment.

Within the Dallas metro, there isn't a single public university or community college east of Dallas outside of I-635. The North Shore District provides ample land to develop a post-secondary institution serving the eastern portion of the Dallas region. If the North Shore District can attract a critical mass of Advanced Manufacturing firms, the need for a technical school or community college in the area would only increase. Additionally, the Garland ISD owns property within the North Shore District. Although there are no immediate plans for the site, the Garland ISD's Career & Technical Education Center provides one possible model for a future Educational Services facility in Rowlett.



REGIONAL & LOCAL EDUCATIONAL SERVICES INDUSTRY DYNAMICS



SOURCE: Avalanche Consulting / EMSI

HEALTH CARE & LIFE SCIENCES



NICHE SECTORS

AMBULATORY HEALTH CARE SERVICES
LIFE SCIENCES R&D
MEDICAL DEVICE MFG.

About the Industry

The Health Care industry encompasses hospital medical care, outpatient care, and urgent care. The Life Sciences industry involves the development of treatments and devices that extend and improve human life, including pharmaceuticals, medical devices, and diagnostic tools. Health Care often involves the application of Life Science discoveries.

Due to the twin forces of demography and technology, Health Care & Life Sciences employment has enjoyed virtually uninterrupted growth during the past two decades. With the continued aging of the US population, the industry's growth is unlikely to abate any time soon. According to the Pew Research Center, approximately 10,000 Baby Boomers will turn age 65 and become eligible for Medicare every day for the next 15 years. In addition to the increase in the absolute number of older Americans, the continued rise in life expectancy within the US will further fuel spending on Health Care & Life Sciences.

A larger senior population living ever-longer lives will sustain continued demand for both technologically advanced medications and devices. Historically, physicians have determined the applicability of specific biomedical devices and diagnostic tools. The growing popularity of wearable technologies, which contain increasingly sophisticated sensors capable of tracking a user's vital signs and physical activity, may usher in an era of market disruptions, creating opportunities for new entrants into the medical device manufacturing sector.

While technological advances in Health Care & Life Sciences have greatly improved health outcomes, they have done so at enormous costs. In 2000, per capita health care cost in the US was less than \$5,000. Today, the figure exceeds \$9,000. In response, both the government and private insurers have adopted a host of cost saving strategies, including efforts to decrease in-patient hospital visits. Technological innovation has contributed to this trend, as new technologies allow medical professionals to conduct a growing number of tests and procedures in an outpatient setting, resulting in a rise in health care delivery occurring in settings outside of traditional acute care facilities.

Health Care & Life Sciences target niche sectors identified for Rowlett's North Shore District include:

- Ambulatory Health Care
- Life Sciences R&D
- Medical Device Manufacturing

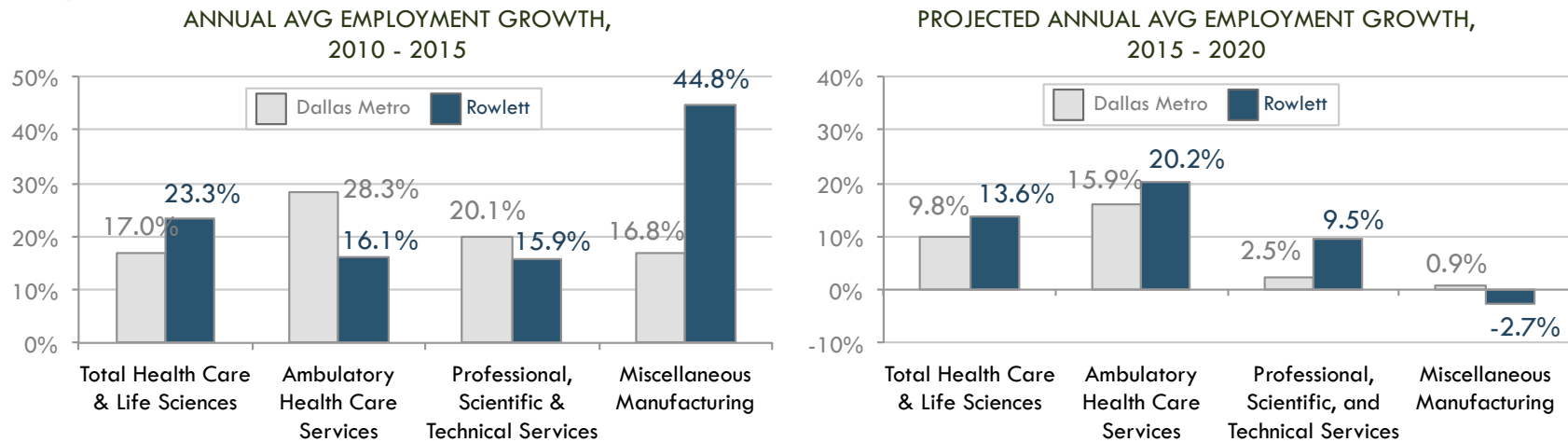
Why the North Shore District?

Both the regional and local Health Care & Life Sciences industries have thrived in recent years. Total Health Care & Life Sciences employment within the Dallas region increased 17% between 2010 and 2015. In Rowlett, Health Care & Life Sciences employment rose at an even greater rate of 23%. All Health Care & Life Sciences niche sectors experienced double-digit employment growth within Rowlett, including Ambulatory Health Care Services, Professional, and Scientific & Technical Services (a broad federal employment category encompassing Life Sciences R&D), and Miscellaneous Manufacturing (another broad category that includes Medical Device Manufacturing).

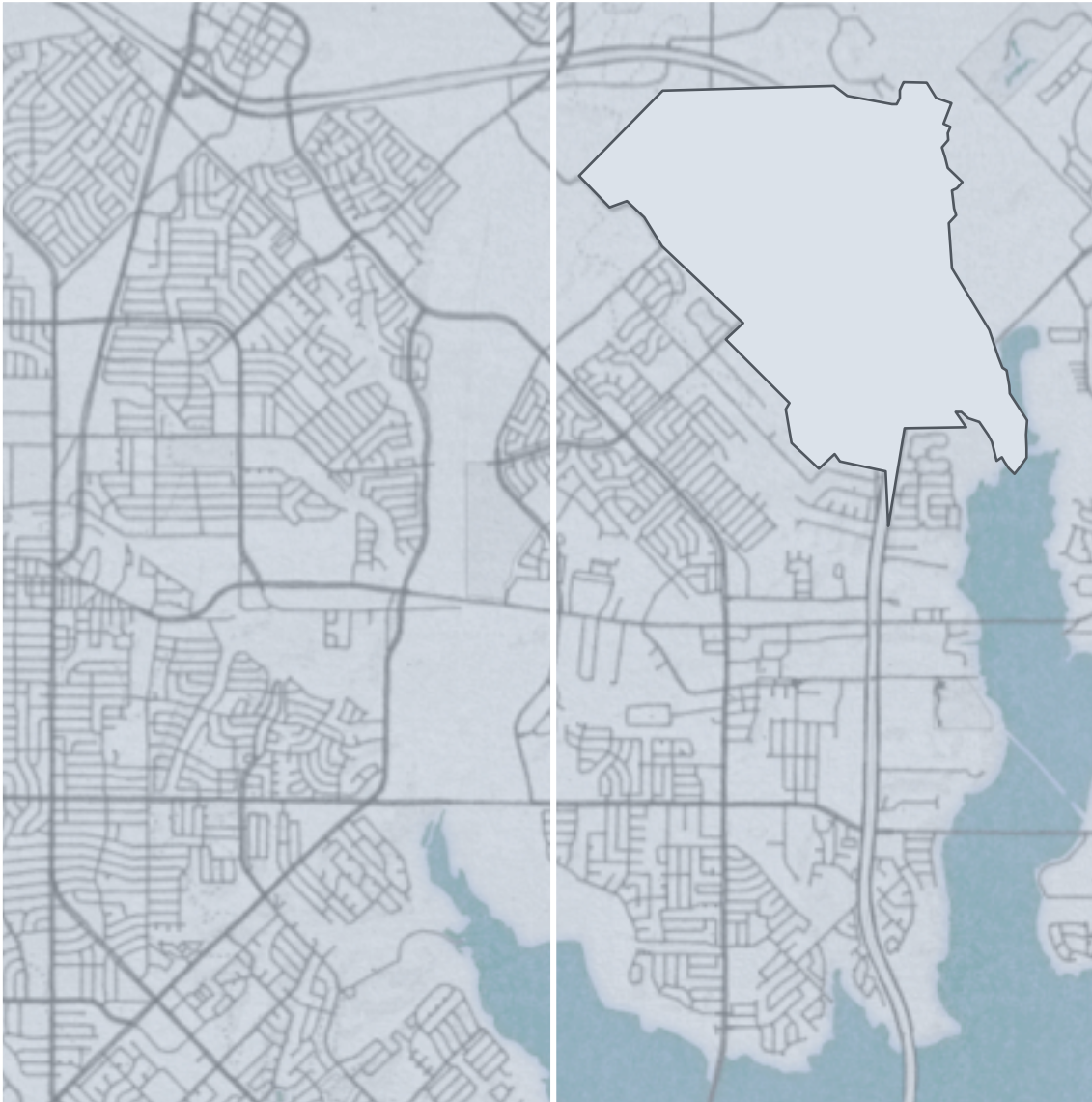
The Health Care & Life Sciences industry is projected to experience additional growth within Rowlett through 2020, creating opportunities for aligned development within the North Shore District. Between 2015 and 2020, total Health Care & Life Sciences employment within Rowlett is expected to grow nearly 40% faster than for the Dallas metro as a whole, with Ambulatory Health Care Services experiencing the most pronounced gains. Rowlett and surrounding communities also feature a large workforce for prospective employers. There are 11,000 more Health Care workers living within 10 miles of Rowlett than Health Care jobs. Currently, these workers commute to other destinations in the Dallas region with greater concentrations of Health Care & Life Sciences jobs. Finally, the North Shore District's greenfield status, combined with its size, allow for virtually any imaginable Health Care & Life Sciences facility.



REGIONAL & LOCAL HEALTH CARE & LIFE SCIENCES INDUSTRY DYNAMICS



SOURCE: Avalanche Consulting / EMSI



TARGET INDUSTRY RECRUITMENT STRATEGY

This section of the report provides a series of strategic recommendations that will help Rowlett realize its vision for the North Shore District. The Target Industry Recruitment Strategy will emphasize marketing initiatives the City of Rowlett can implement to help increase awareness of the North Shore District and effectively position the site for commercial and industrial development.

NORTH SHORE DISTRICT MARKETING TOOLKIT

To effectively market the North Shore District, the City of Rowlett must make further investments in its marketing toolkit. The City of Rowlett Office of Economic Development's current budget is \$54,000 per year. Nearly half of this goes towards the website domain. The remaining budget is directed towards printing, promotional materials, event sponsorships, Team Texas, and Dallas Regional Chamber Marketing Team.

To implement the recommendations in this strategy, we recommend a budget increase of at least \$25,000 or reallocating funds as needed. For example, consider investing in a more cost-effective website domain or decreasing printing costs. We advise focusing on digital investments, such as a standalone website for the North Shore District, rather than printed materials. Earned media is also an effective yet low cost marketing tool. The City of Rowlett should continue to leverage partnerships with the Dallas Regional Chamber and Team Texas to attend and sponsor select events.

Recommendations

Invest in a website dedicated to the North Shore District.

- Include top marketing messages about the Dallas region, Rowlett, and the North Shore District.
- Provide detailed information about the District, such as maps that illustrate each phase and zoning.
- Include impactful photography of the community and development renderings to help showcase both the city and the District.
- Create a subpage for each target industry that includes top selling points, business testimonials, and other key information. See the target industry recommendations on the following pages for more detailed recommendations.
- Include a News & Media page that archives press releases and news coverage about the North Shore District.
- See Generation Park's website as an example: www.generationpark.com.
- If budgetary constraints are a concern, consider using website development services such as Squarespace (www.squarespace.com), which allow you to use custom templates to build your website for as little as \$20/month. Visit www.oneregionstrategy.com to see an example of an economic development strategy website Avalanche Consulting built for the Charleston region using Squarespace.

Continue to produce the North Shore District marketing brochure.

- Make the brochure available for download online.
- As development occurs, keep available property listings updated.

Conduct a media relations campaign for the North Short District. Focus on earned media rather than paid advertising.

- Distribute press releases about positive economic development stories in Rowlett as well as North Shore District development progress.
- Distribute press releases to both local and national media. Include publications such as Area Development and Site Selection Magazine.

- Keep the Dallas Regional Partnership and the State's Office of Economic Development aware of new developments at the District so they are armed with updated information and can direct prospects to Rowlett accordingly.
- Distribute news stories through an e-newsletter to site selectors and target industry executives. This can be a quarterly distribution that compiles all news and announcements related to the District.
- Distribute content about the North Shore District through Rowlett's social media channels.

Continue to participate in direct marketing activities with The Dallas Regional Chamber Marketing Team and Team Texas.

- Continue participating in the Team Texas sponsorship package at the \$5,000 level.
- Attend events that are aligned with target industries (see the adjacent table for guidelines on evaluating event attendance).
- Continue to build relationships with site selectors and target industry executives at events.

Conduct an internal marketing campaign to educate Rowlett citizens about the benefits of North Shore District's development and importance of utilizing the land for commercial purposes to generate a tax base to maintain Rowlett's quality of life.

- Educate residents about the benefits of a diversified economic and tax base.
- Continue to distribute press releases about North Shore District development progress to local media, including the findings of this report.
- Ask local leaders to write op-eds in local media publications.
- Post North Shore District updates on the City of Rowlett's social media pages.

EVALUATING ATTENDANCE

Establishing a system for evaluating each event attended ensures that the City can optimally utilize their resources. Standardize the use of evaluation metrics to consistently measure the success of each event and adjust event attendance schedules on an annual basis. Metrics can include:

- Acquire attendee list and contact information of attendees.
- The location of the event is in a targeted marketing geography (locations where there is a concentration of target industry firms).
- Generate publicity for Rowlett and the North Shore District while attending the event.
- Ability to meet one-to-one with a number of executives and decision makers attending the event.
- Attend events at which at least a majority of participants are executives and decision makers (as opposed to marketing and sales representatives attend the event).
- Participate in events at which most attendees are industry representatives, not economic developers.
- Seek out speakers and exhibits at the event that help build the City of Rowlett's team's knowledge of the industry, making the organization better at communicating with industry executives.
- Explore unique sponsorship and/or exhibit opportunities that will help Rowlett stand out and build brand awareness at the event.
- Ensure that the event is not prohibitively expensive, whether attending alone or with our partners.

ADVANCED MANUFACTURING

Recommendations

Dedicate a page of the District's website to Advanced Manufacturing.

- Include top selling points of why Rowlett and the North Shore District is a desirable location for Advanced Manufacturing firms.
- Include a stylized map that shows Rowlett's highway infrastructure, access to airports, and proximity to downtown Dallas.
- Create a stylized map that illustrates Rowlett's proximity to other manufacturers and suppliers in the Dallas metro.
- Include renderings of the North Shore District and the areas zoned for Advanced Manufacturing.
- Obtain testimonials from local Advanced Manufacturing employers about why they chose Rowlett to locate their business.
- Talk about the North Shore District as the DFW Metro's premier location for Advanced Manufacturing.

Distribute Advanced Manufacturing content through Rowlett's social media channels.

- Create a monthly social media calendar to optimize messaging and ease implementation.
- Promote top selling points, successes, news, rankings, and other topics relevant to Advanced Manufacturing. Use photos, video, and other multimedia when possible.
- Connect with Advanced Manufacturing executives and thought leaders on Twitter and LinkedIn. Follow, share their content, and tag them in posts when appropriate.

Distribute press releases about Rowlett and the North Shore District to Advanced Manufacturing trade publications and websites, such as:

- The Fabricator: www.thefabricator.com
- Fabricating and Metalworking: www.fabricatingandmetalworking.com
- Modern Machine Shop: www.mmsonline.com

TOP SELLING POINTS

- The Dallas region has a rich tradition of manufacturing, with specific competencies in areas such as aerospace, electronics, and metal products manufacturing.
- There is a deep pool of skilled manufacturing talent in Rowlett. There is a surplus of approximately 4,500 manufacturing workers residing within Rowlett and surrounding communities.
- Since 2010, Manufacturing employment within Rowlett has increased approximately 16%.
- Metal product manufacturing and machinery manufacturing are projected to experience double-digit employment growth through 2020.
- The North Shore District will have the capacity to support large-scale manufacturers as well as existing manufacturing firms looking to expand their operations locally.
- Rowlett's strategic location along the President George Bush Turnpike (PGBT), just 19 miles from downtown Dallas with easy access to Dallas Love Field and Dallas Fort Worth airports, makes it an attractive location for Advanced Manufacturing firms.

- Electronic Component News: www.ecnmag.com

Develop a sales presentation and PDF handout for each Advanced Manufacturing niche sector.

- Include the top selling points listed in this report and other key information included on the website.
- Use impactful imagery of the Rowlett community and renderings of the North Shore District zoned for Advanced Manufacturing.

Continue to participate in direct marketing activities together with The Dallas Regional Chamber Marketing Team and Team Texas.

- Join the Marketing Team and/or Team Texas at industry events and marketing missions related to Advanced Manufacturing niche sectors.
- Host inbound events or familiarization tours in Rowlett when Advanced Manufacturing executives and site consultants are visiting the region.

BUSINESS & PROFESSIONAL SERVICES

Recommendations

Dedicate a page of the North Shore District website to Business & Professional Services.

- Include top selling points of why Rowlett and the North Shore District is a desirable location for Business & Professionals Services firms.
- Include a stylized map that shows Rowlett's proximity to highways, airports, and downtown Dallas.
- Include renderings of the North Shore District and the areas zoned for Business & Professional Services.
- Obtain testimonials from local Business & Professional Services employers about why they chose Rowlett to locate their business.
- Obtain testimonials from young professionals about why they chose to live and work in Rowlett.
- Invest in multimedia that showcases Rowlett's quality of life offerings to appeal to Business & Professional Services talent.

Distribute Business & Professional Services content through Rowlett's social media channels.

- Create a monthly social media calendar to optimize messaging and ease implementation.
- Promote top selling points, successes, news, rankings, and other topics relevant to Business & Professional Services. Use photos, video, and other multimedia when possible.
- Connect with Business & Professional Services executives, thought leaders, and media publications on Twitter and LinkedIn. Follow, share their content, and tag them in posts when appropriate.

Distribute press releases about Rowlett and the North Shore District to business publications. Consider hiring a public relations firm to assist, as it can be difficult to connect with these highly circulated publications. Top publications include:

- Wall Street Journal: www.wsj.com

TOP SELLING POINTS

- The Dallas metro ranks fourth among all US regions in Fortune 500 headquarters.
- Between 2010 and 2015, Business & Professional employment in the City of Rowlett increased nearly 11%.
- Within a 10-mile radius of Rowlett, there is a surplus of 29,000 Business & Professional Services and Finance talent.
- More than 31% of City of Rowlett residents possess a bachelor's degree or higher level of educational attainment, higher than the Texas and US averages.
- The North Shore District, combined with the completed PG&T, provides the real estate and infrastructure needed for Business & Professional Services firms.
- Assets such as Lake Ray Hubbard, The Village, Dallas Rapid Area Transit's blue line rail, and new multi-family housing developments provide lifestyle amenities that appeal to young professionals.
- Rowlett's proximity to downtown Dallas and two international airports provide easy access to larger markets.

- The Economist: www.economist.com
- Bloomberg Businessweek: www.bloomberg.com/businessweek
- Forbes: www.forbes.com
- Dallas Business Journal: www.bizjournals.com/dallas
- Texas CEO Magazine: <http://texasceomagazine.com/>
- Participate in media tours hosted by the Dallas Regional Chamber, especially those that include business publications.
- Consider developing a media relations campaign around the lifestyle amenities that would be attractive for business and professional services companies and talent, such as the new Bayside development. Tout available office space at both Bayside and North Shore District.

Develop a sales presentation and PDF handout for each Business & Professional Services niche sector.

- Include the top selling points listed in this report and other key information included on the website.
- Use impactful imagery of the Rowlett community and renderings of the North Shore District zoned for Business & Professional Services.

Continue to participate in direct marketing activities with The Dallas Regional Chamber Marketing Team and Team Texas.

- Participate in the industry events and marketing missions related to Business & Professional Services firms.
- Host inbound events or familiarization tours in Rowlett when Business & Professional Services executives and site consultants are visiting the region.

EDUCATIONAL SERVICES

Recommendations

Dedicate a page of the North Shore District website to Educational Services.

- Include top selling points of why Rowlett and the North Shore District is a desirable location for Educational Services.
- Create a stylized map that illustrates the gap in educational service providers in the eastern portion of Dallas metro.
- Include renderings of the North Shore District and the areas zoned for Educational Services.

Collaborate with local and regional education providers.

- Meet with Garland ISD to discuss the possibility of expanding the Career & Technical Education Center in the North Shore District.
- Meet with regional community college systems to explore the potential of expanding programs in the North Shore District, especially for those that align with target industries. Determine which community colleges are interested in expanding to serve the need of the eastern portion of the Dallas region and which programs can best serve employer needs.
- Meet with leaders at Texas' university systems (e.g., TAMU, UT, Texas State) to learn about their plans to expand their presence in the DFW Metro. Learn from other communities, such as Round Rock, Texas, about how they successfully recruited university campuses / programs into their cities.
- Explore federal and state grant funding opportunities for educational program expansion.

TOP SELLING POINTS

- Within the Dallas metro, there isn't a single public university or community college east of Dallas outside of I-635.
- Current projections for the Dallas region anticipate a 15% increase in Educational Services employment through 2020.
- The North Shore District provides ample land to develop a post-secondary institution serving the eastern portion of the Dallas region.
- If the North Shore District can attract a critical mass of Advanced Manufacturing firms, the need for a technical school or community college in the area would only increase.

HEALTH CARE & LIFE SCIENCES

Recommendations

Dedicate a page of the North Shore District website to Health Care & Life Sciences.

- Include top selling points of why Rowlett and the North Shore District is a desirable location for Health Care & Life Sciences firms.
- Create a stylized map of all the Health Care & Life Sciences companies and research institutions in the Dallas metro.
- Include renderings of the North Shore District and the areas zoned for Health Care & Life Sciences.
- Obtain testimonials from local Health Care & Life Sciences professionals about why they chose to live and work in Rowlett.
- Invest in multimedia that showcases Rowlett's quality of life offerings to appeal to Health Care & Life Sciences talent.

Distribute Health Care & Life Sciences content through Rowlett's social media channels.

- Create a monthly social media calendar to optimize messaging and ease implementation.
- Promote top selling points, successes, news, rankings, and other topics relevant to Health Care & Life Sciences. Use photos, video, and other multimedia when possible.
- Connect with Health Care & Life Sciences executives and thought leaders on Twitter and LinkedIn. Follow, share their content, and tag them in posts when appropriate.

Distribute press releases about Rowlett and the North Shore District to Health Care & Life Sciences trade publications, such as:

- Modern Healthcare: www.modernhealthcare.com
- Health Leaders Media: www.healthleadersmedia.com
- Medical Device and Diagnostic Industry News: www.mddionline.com
- Ask Lake Pointe Medical Center to distribute press releases through their media network.

TOP SELLING POINTS

- Between 2010 and 2015, total Health Care & Life Sciences employment within the Dallas region and City of Rowlett increased 17% and 23%, respectively.
- All Health Care & Life Sciences niche sectors experienced double-digit employment growth within Rowlett, including Ambulatory Health Care Services, Professional, and Scientific & Technical Services, and Miscellaneous Manufacturing.
- The Health Care & Life Sciences industry is projected to experience additional growth within Rowlett through 2020, creating opportunities for aligned development within the North Shore District.
- Between 2015 and 2020, total Health Care & Life Sciences employment within Rowlett is expected to grow nearly 40% faster than for the Dallas metro as a whole, with Ambulatory Health Care Services experiencing the most pronounced gains.
- Rowlett and surrounding communities feature a large workforce from which prospective employers can tap—there is a surplus of 11,000 Health Care workers living within 10 miles of Rowlett.
- The North Shore District's greenfield status, combined with its size, allow for virtually any imaginable Health Care & Life Sciences facility.
- Rowlett's scenic location on Lake Ray Hubbard and proximity to Lake Pointe Medical Center make it an ideal location for Health Care & Life Sciences facilities.

Develop a sales presentation and PDF handout for each Health Care & Life Sciences niche sector.

- Include the top selling points listed in this report and other key information included on the website.
- Use impactful imagery of the Rowlett community and renderings of the North Shore District zoned for Health Care & Life Sciences.

Continue to participate in direct marketing activities with The Dallas Regional Chamber Marketing Team and Team Texas.

- Participate in the industry events & trade shows related to Health Care & Life Sciences niche sectors.
- Host inbound events or familiarization tours in Rowlett when Health Care & Life Sciences executives and site consultants are visiting the region.
- Participate in Team Texas marketing missions that are in geographies with a concentration of Health Care & Life Sciences niche sectors.

Meet with leaders from DFW Metro hospital networks. Share data with hospital administrators that showcases Rowlett and the surrounding region's significant population growth and age demographics. Learn about their criteria for expanding into new locations and what Rowlett can do to better position the North Shore District for Health Care & Life Sciences investment.