



Intelligent  
Real Estate  
Solutions

# Core Submarket Heat Maps

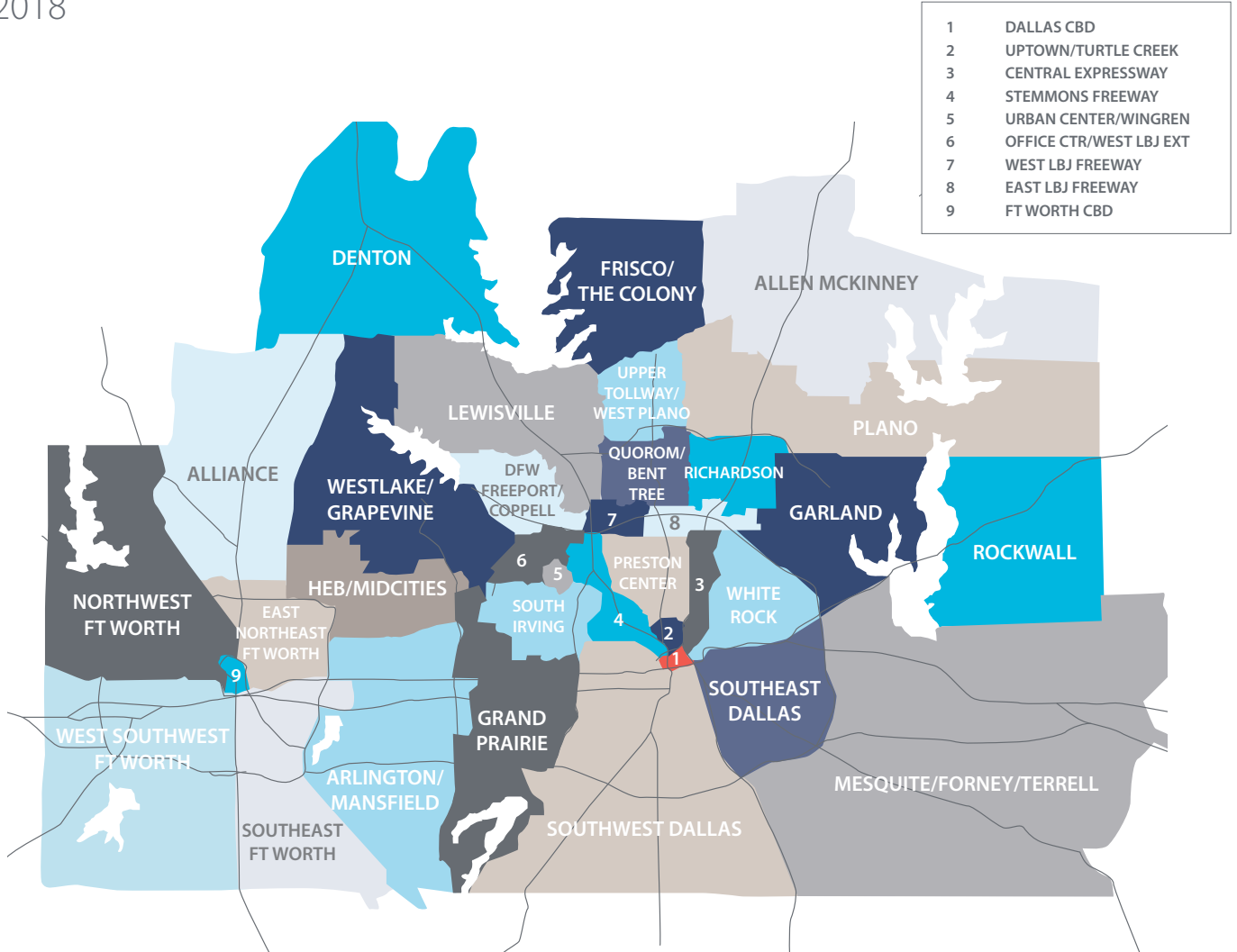
Q4 2018

**Avison Young Dallas**

1920 McKinney Ave  
Suite 1100  
Dallas, TX | 75201

# Core Submarket Heat Maps

Q4 2018

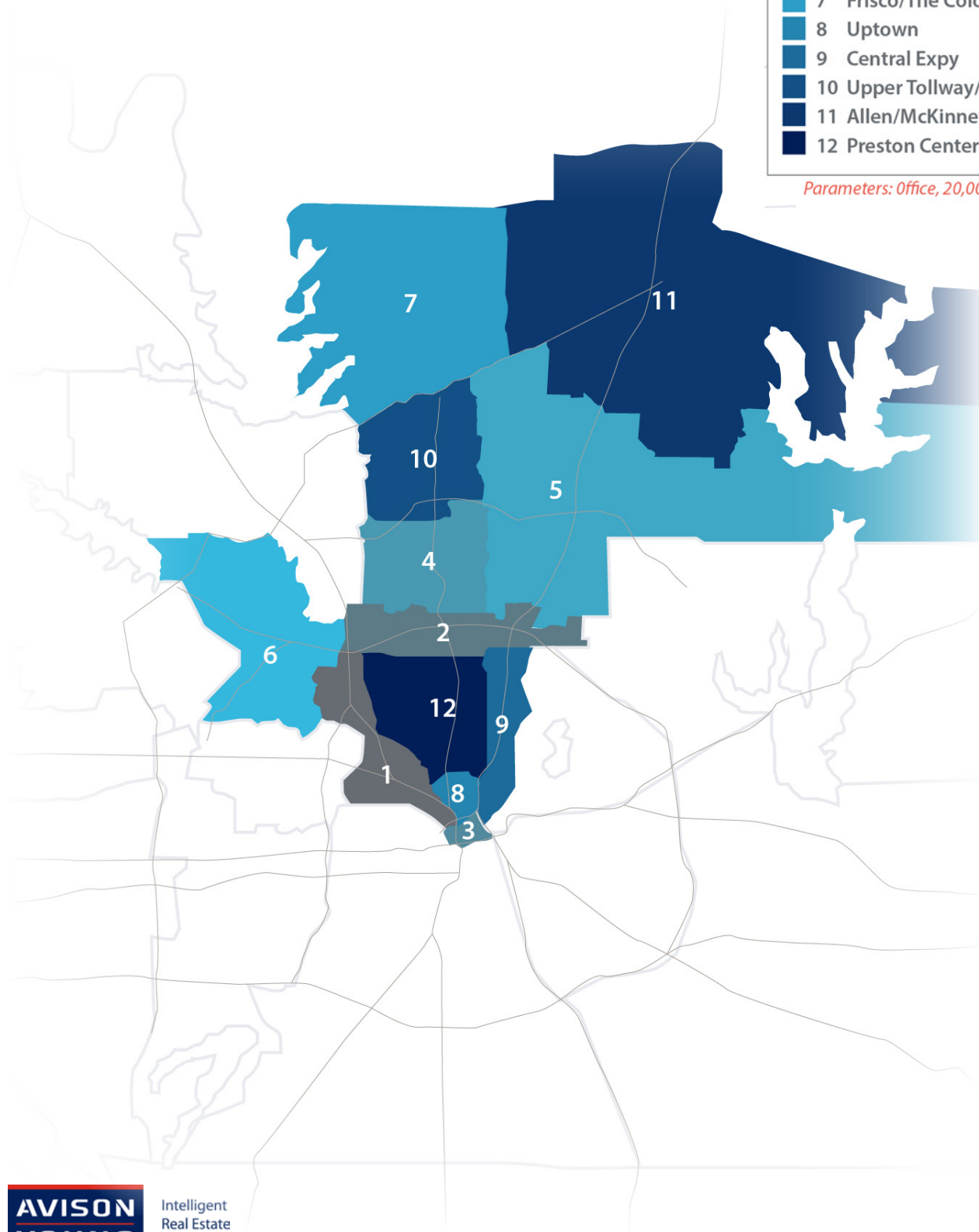


## Core Submarkets

Allen/McKinney  
Central Expressway  
Dallas CBD  
Frisco/The Colony  
Las Colinas  
LBJ  
Preston Center  
Quorum/Bent Tree  
Richardson/Plano  
Stemmons  
Upper Tollway/West Plano  
Uptown

# Core Submarket Heat Maps

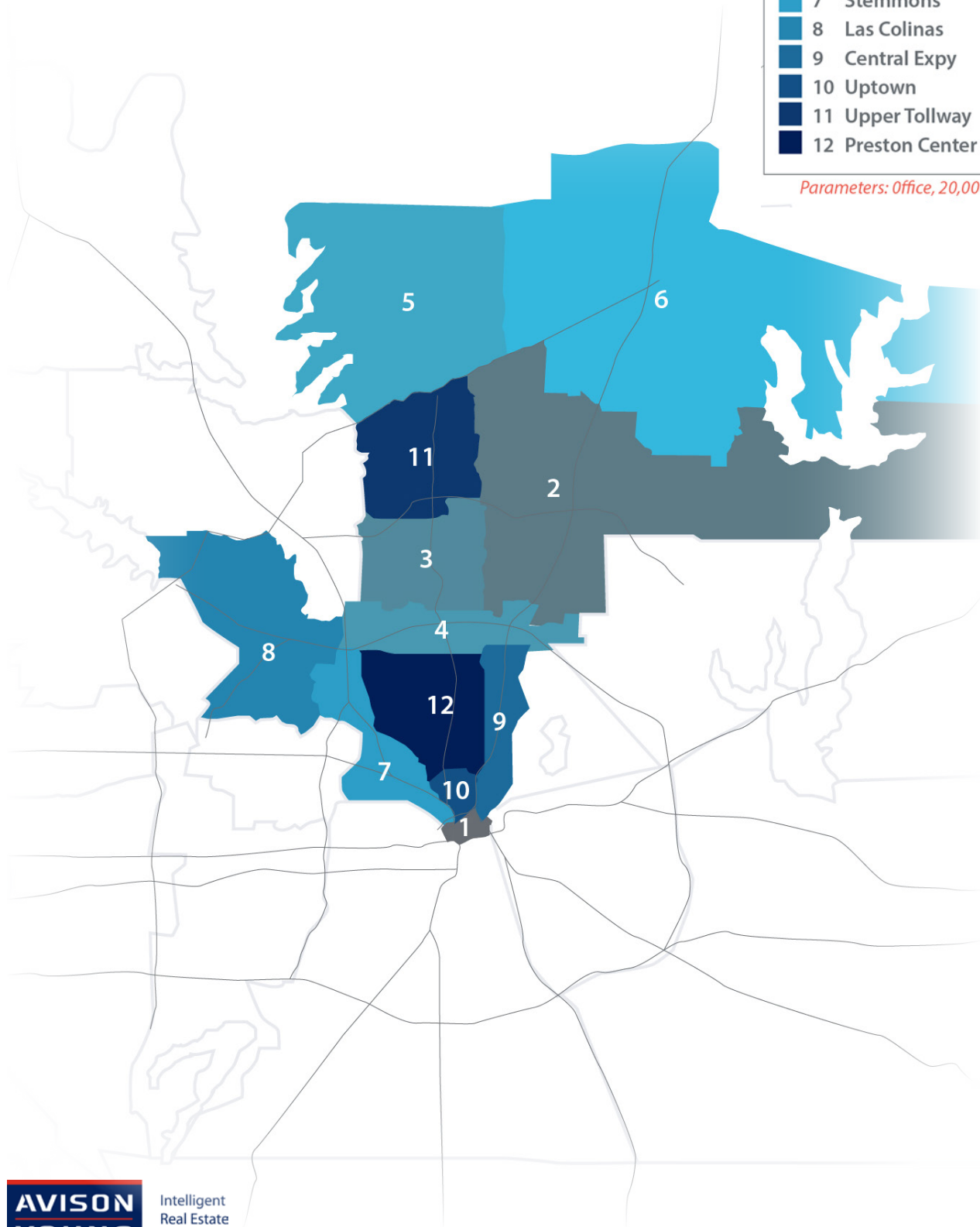
Q4 2018



Parameters: Office, 20,000 SF+, Existing

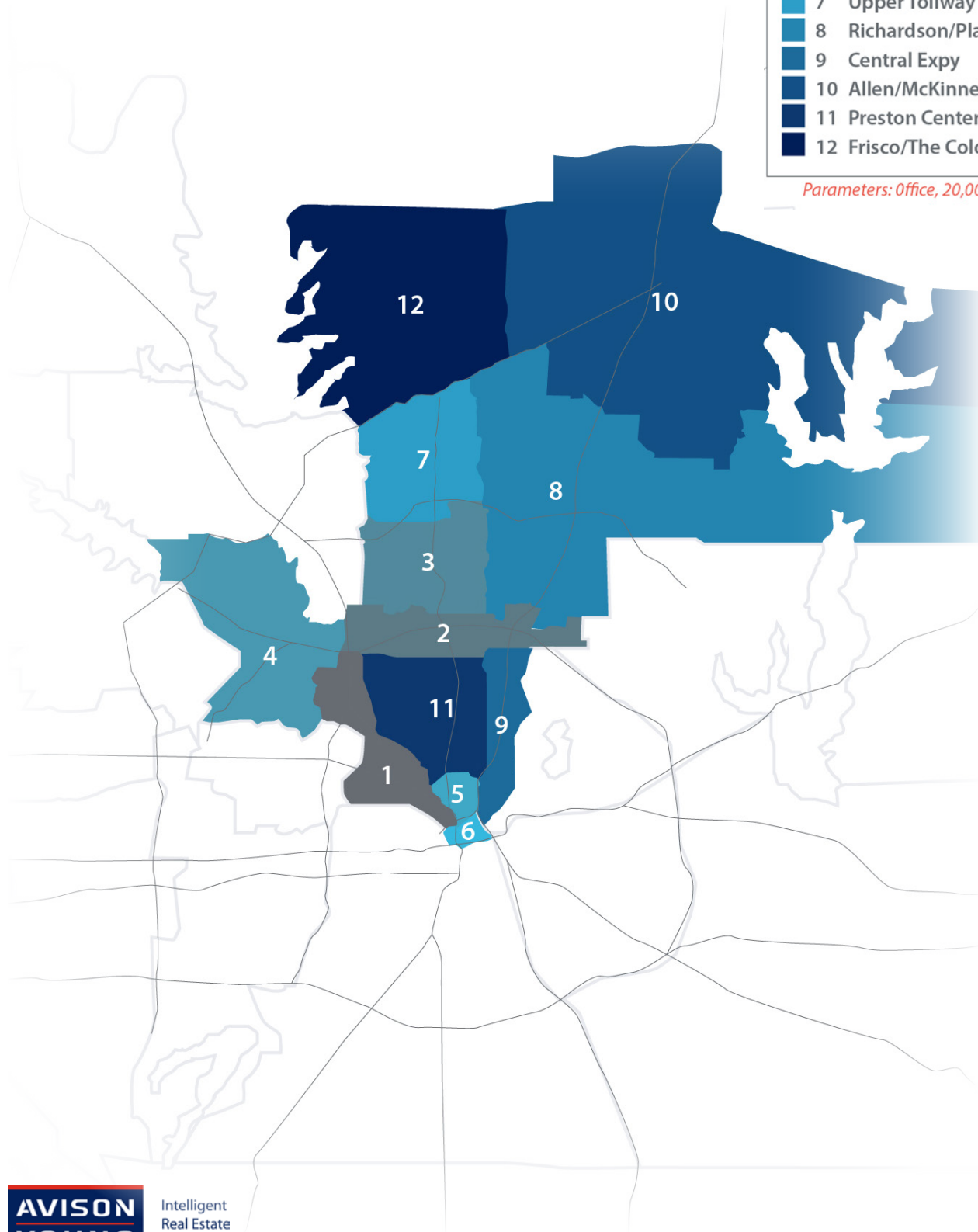
# Core Submarket Heat Maps

Q4 2018



# Core Submarket Heat Maps

Q4 2018



Parameters: Office, 20,000 SF+, Existing

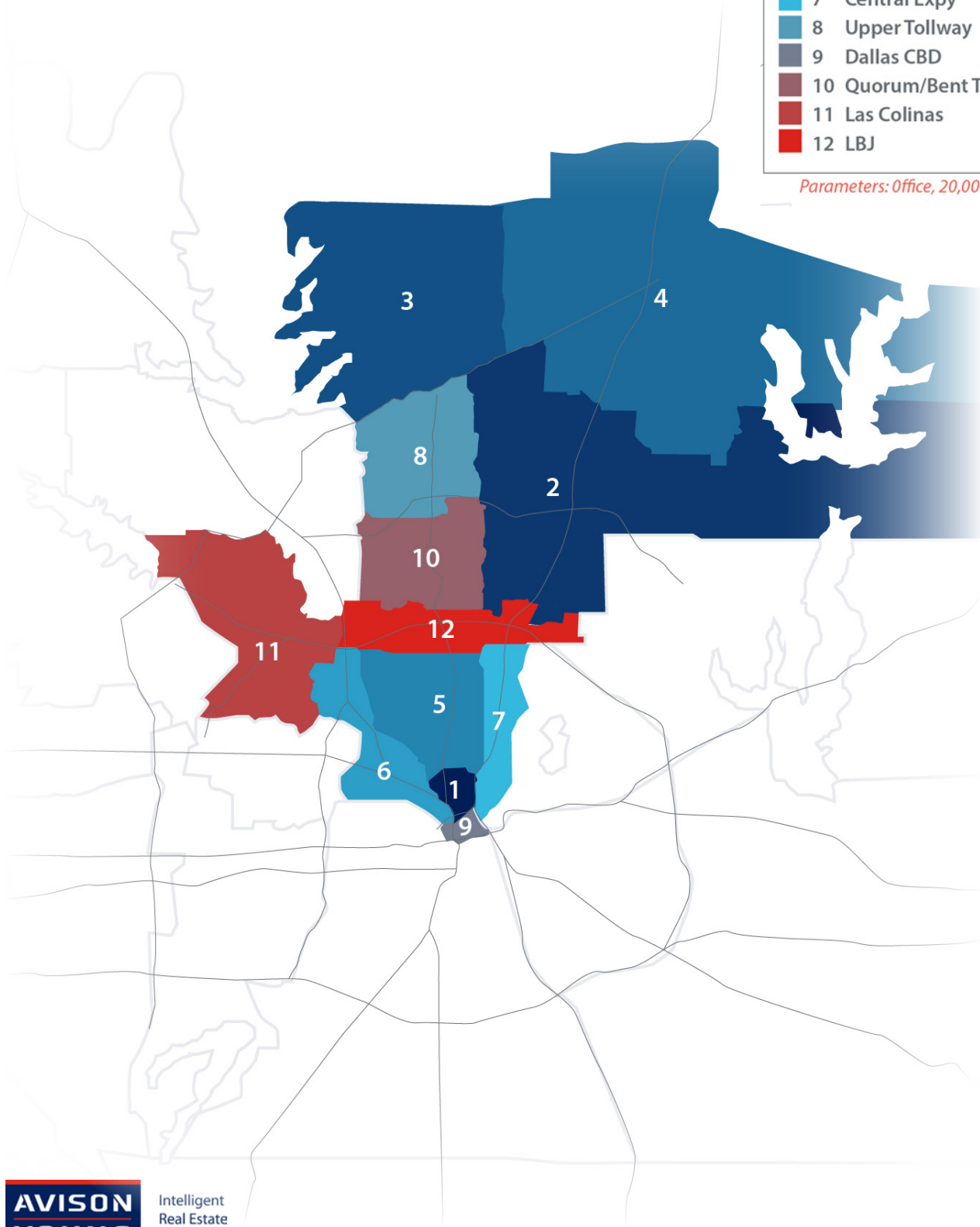
# Core Submarket Heat Maps

Q4 2018

12 Mo. Net Absorption: Class B

1	Uptown	168,854
2	Richardson/Plano	145,076
3	Frisco/The Colony	68,291
4	Allen/McKinney	15,755
5	Preston Center	-1,418
6	Stemmons	-26,330
7	Central Expy	-123,200
8	Upper Tollway	-159,728
9	Dallas CBD	-175,611
10	Quorum/Bent Tree	-273,045
11	Las Colinas	-401,057
12	LBJ	-403,015

Parameters: Office, 20,000 SF+, Existing





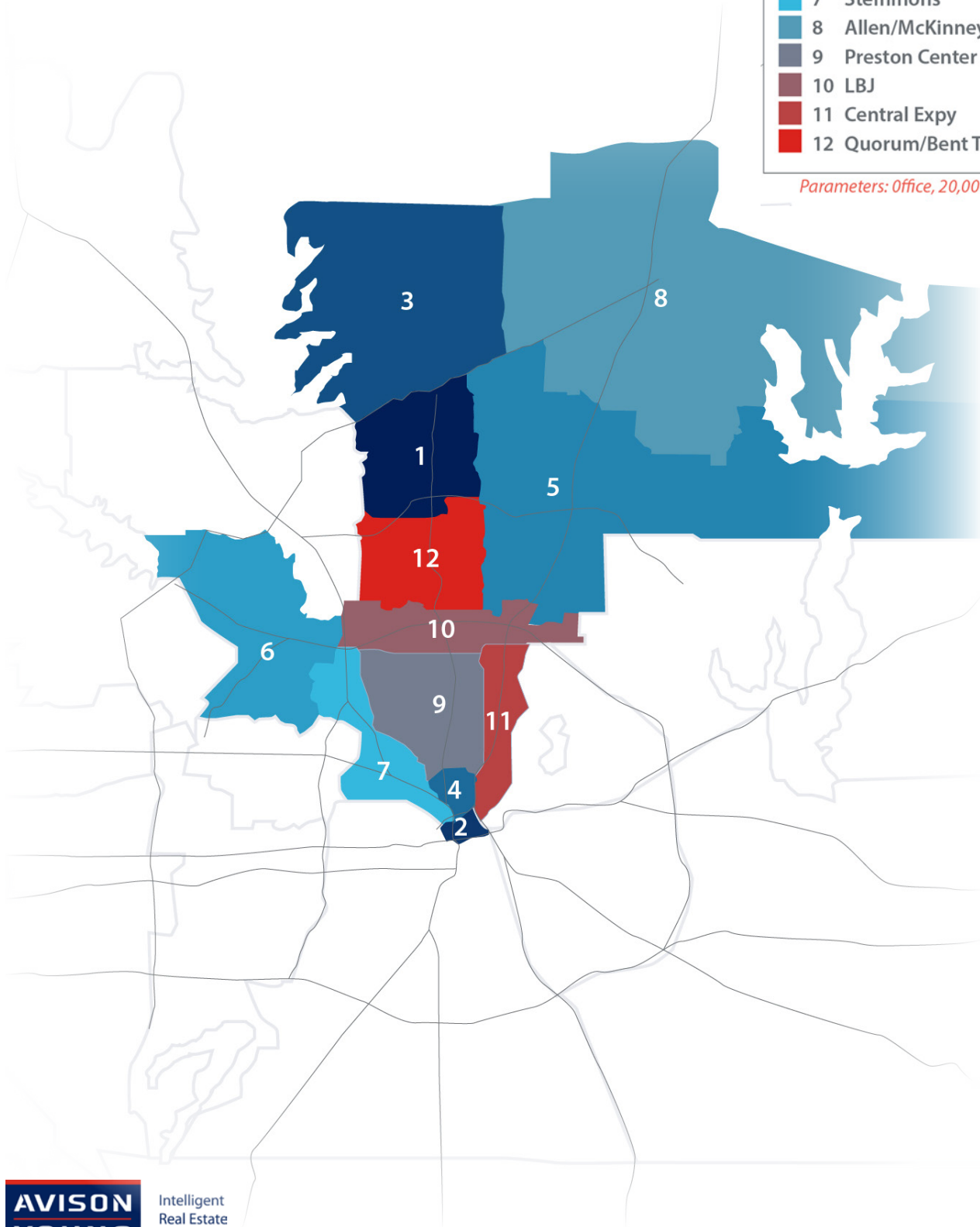
# Core Submarket Heat Maps

Q4 2018

## 12 Mo. Net Absorption: Class A

1	Upper Tollway	2,699,798
2	Dallas CBD	739,488
3	Frisco/The Colony	568,114
4	Uptown	527,882
5	Richardson/Plano	512,170
6	Las Colinas	433,117
7	Stemmons	411,801
8	Allen/McKinney	278,244
9	Preston Center	213,223
10	LBJ	184,803
11	Central Expy	-203,913
12	Quorum/Bent Tree	-451,810

Parameters: Office, 20,000 SF+, Existing



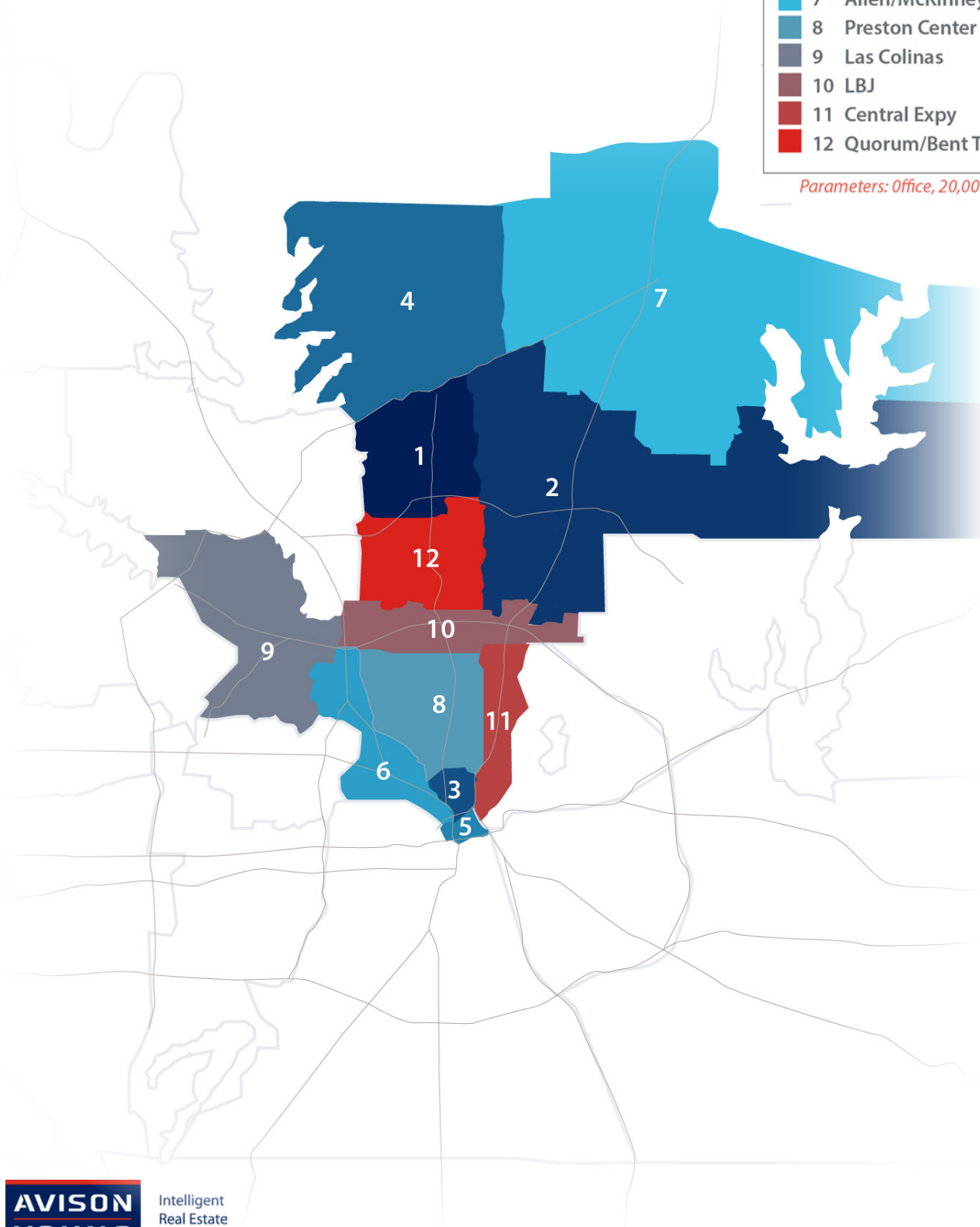
# Core Submarket Heat Maps

Q4 2018

## 12 Mo. Net Absorption: Totals

1	Upper Tollway	2,540,070
2	Richardson/Plano	696,217
3	Uptown	670,035
4	Frisco/The Colony	630,191
5	Dallas CBD	563,877
6	Stemmons	379,667
7	Allen/McKinney	293,999
8	Preston Center	222,810
9	Las Colinas	-5,895
10	LBJ	-205,360
11	Central Expy	-323,469
12	Quorum/Bent Tree	-704,990

*Parameters: Office, 20,000 SF+, Existing*





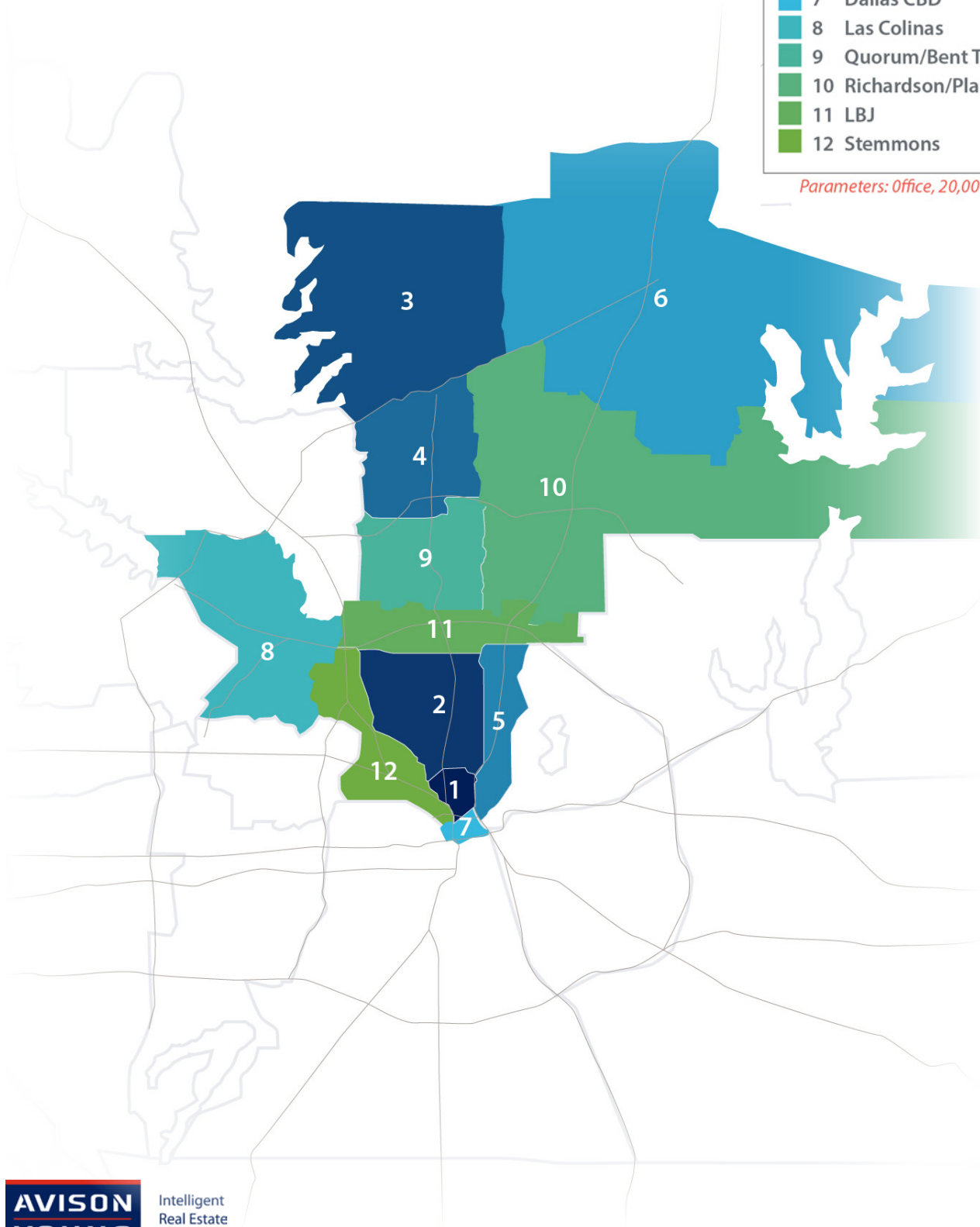
# Core Submarket Heat Maps

Q4 2018

## Avg. Gross Direct Rates: Totals

1	Uptown	\$39.47
2	Preston Center	\$38.03
3	Frisco/The Colony	\$33.22
4	Upper Tollway	\$31.12
5	Central Expy	\$29.84
6	Allen/McKinney	\$26.69
7	Dallas CBD	\$26.28
8	Las Colinas	\$26.08
9	Quorum/Bent Tree	\$25.72
10	Richardson/Plano	\$24.72
11	LBJ	\$22.81
12	Stemmons	\$17.12

*Parameters: Office, 20,000 SF+, Existing*



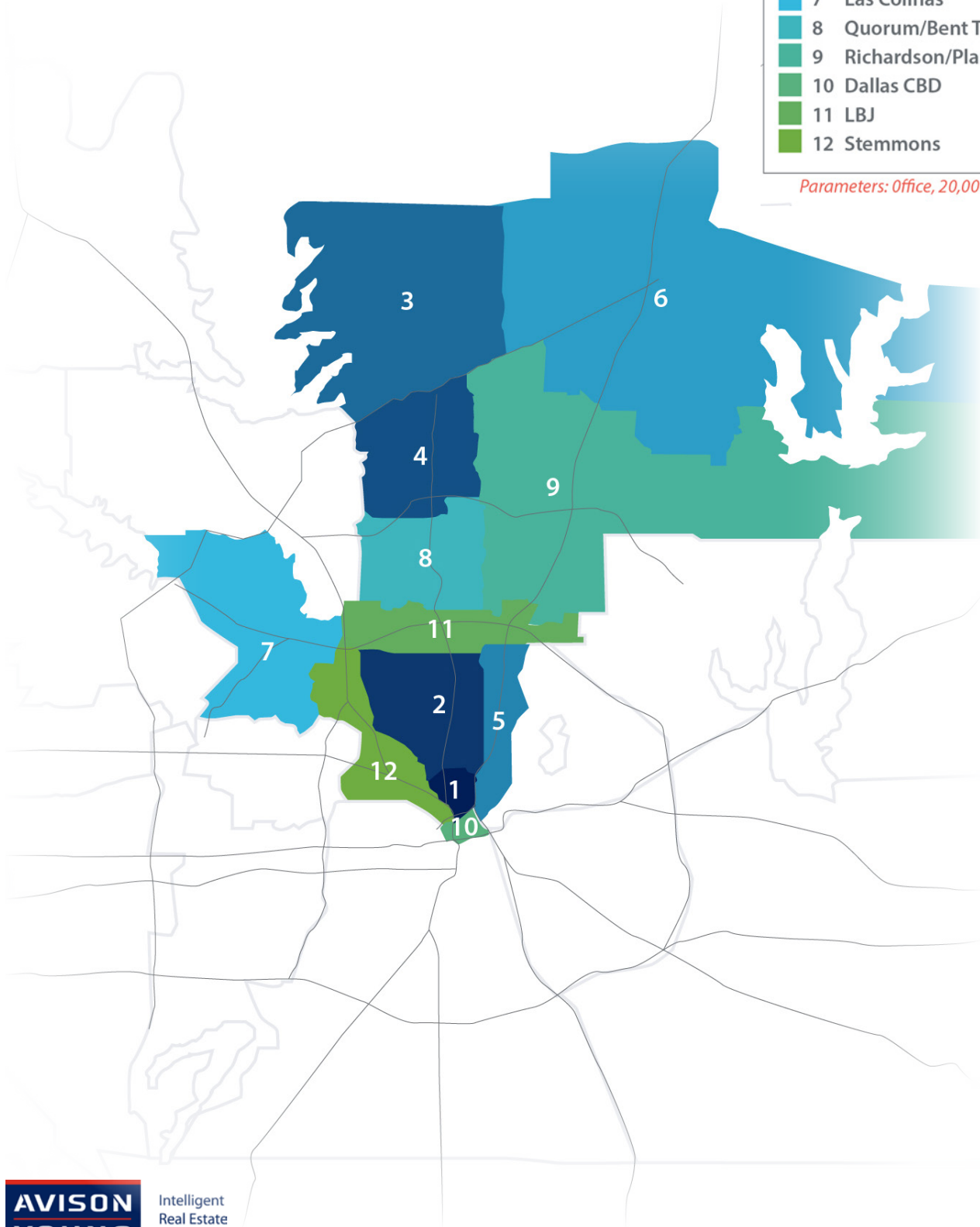
# Core Submarket Heat Maps

Q4 2018

Avg. Gross Direct Rates: Class A

1	Uptown	\$41.92
2	Preston Center	\$39.86
3	Frisco/The Colony	\$34.20
4	Upper Tollway	\$34.08
5	Central Expy	\$31.89
6	Allen/McKinney	\$31.22
7	Las Colinas	\$30.77
8	Quorum/Bent Tree	\$30.15
9	Richardson/Plano	\$27.46
10	Dallas CBD	\$27.31
11	LBJ	\$26.38
12	Stemmons	\$18.97

Parameters: Office, 20,000 SF+, Existing



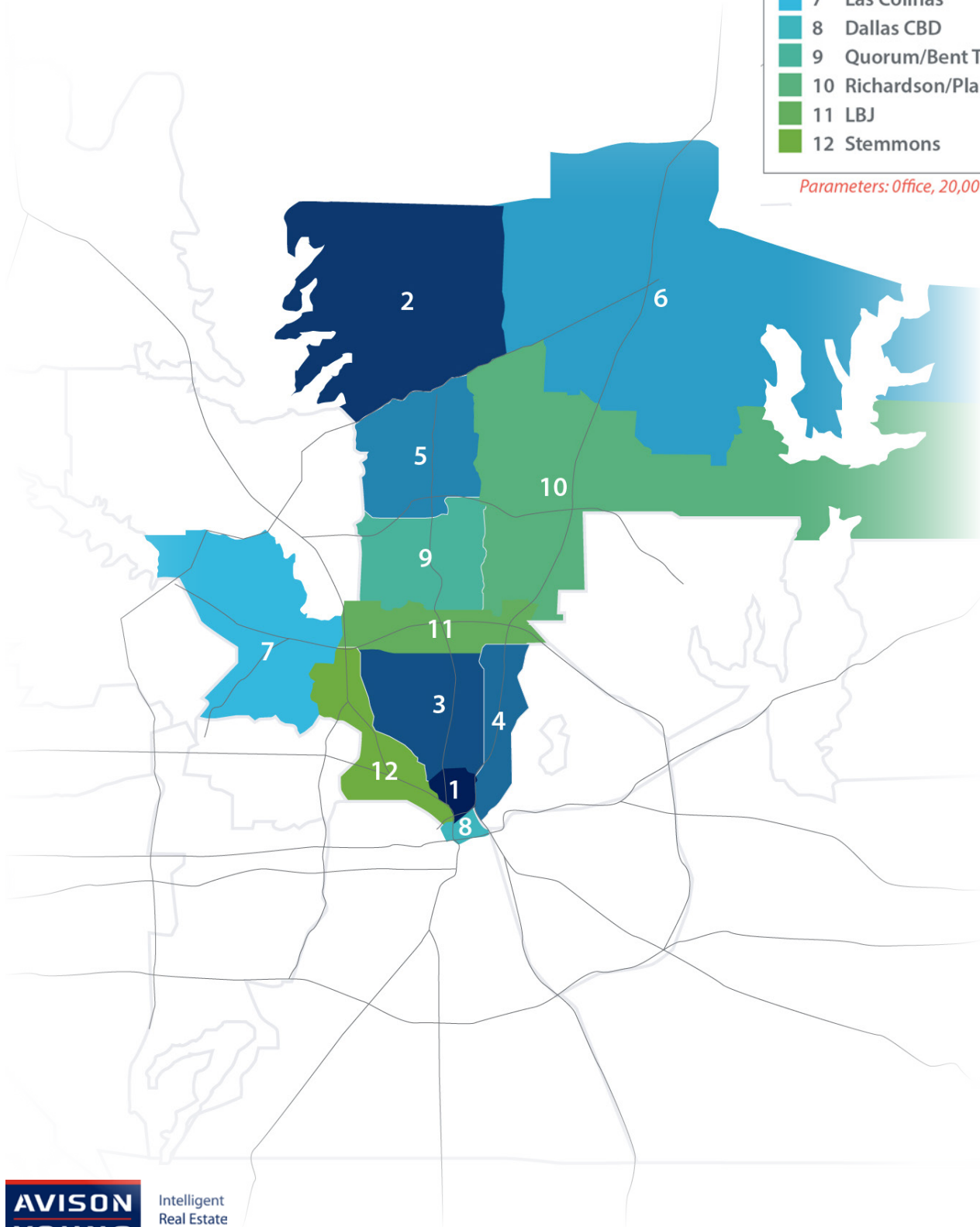
# Core Submarket Heat Maps

Q4 2018

Avg. Gross Direct Rates: Class B

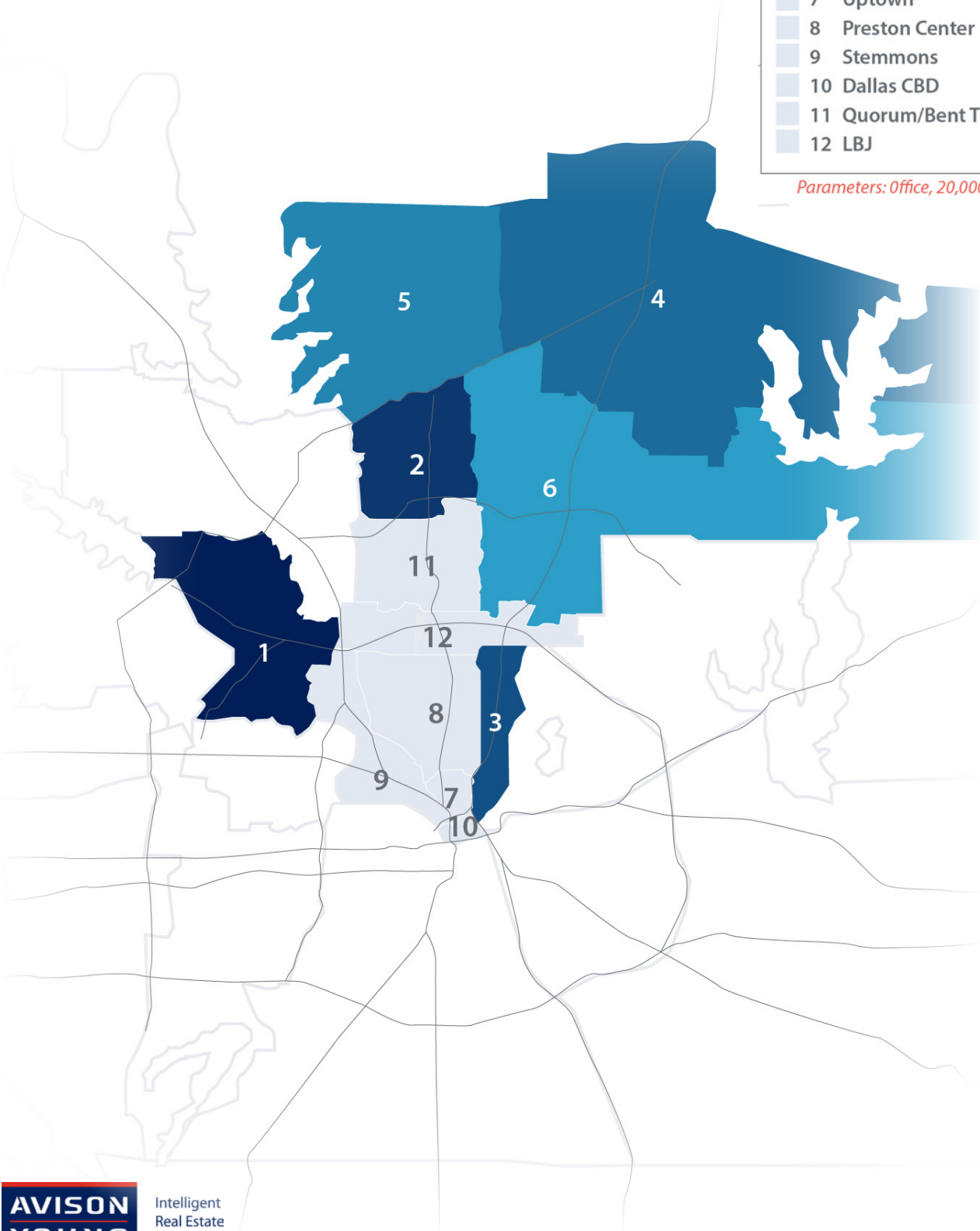
1	Uptown	\$34.18
2	Frisco/The Colony	\$29.06
3	Preston Center	\$28.56
4	Central Expy	\$26.99
5	Upper Tollway	\$25.77
6	Allen/McKinney	\$23.68
7	Las Colinas	\$22.01
8	Dallas CBD	\$20.80
9	Quorum/Bent Tree	\$20.46
10	Richardson/Plano	\$20.44
11	LBJ	\$19.56
12	Stemmons	\$16.25

Parameters: Office, 20,000 SF+, Existing



# Core Submarket Heat Maps

Q4 2018



Under Construction: Class B		
1	Las Colinas	133,000
2	Upper Tollway	47,300
3	Central Expy	38,848
4	Allen/McKinney	25,000
5	Frisco/The Colony	20,228
6	Richardson/Plano	20,000
7	Uptown	0
8	Preston Center	0
9	Stemmons	0
10	Dallas CBD	0
11	Quorum/Bent Tree	0
12	LBJ	0

Parameters: Office, 20,000 SF+, Existing

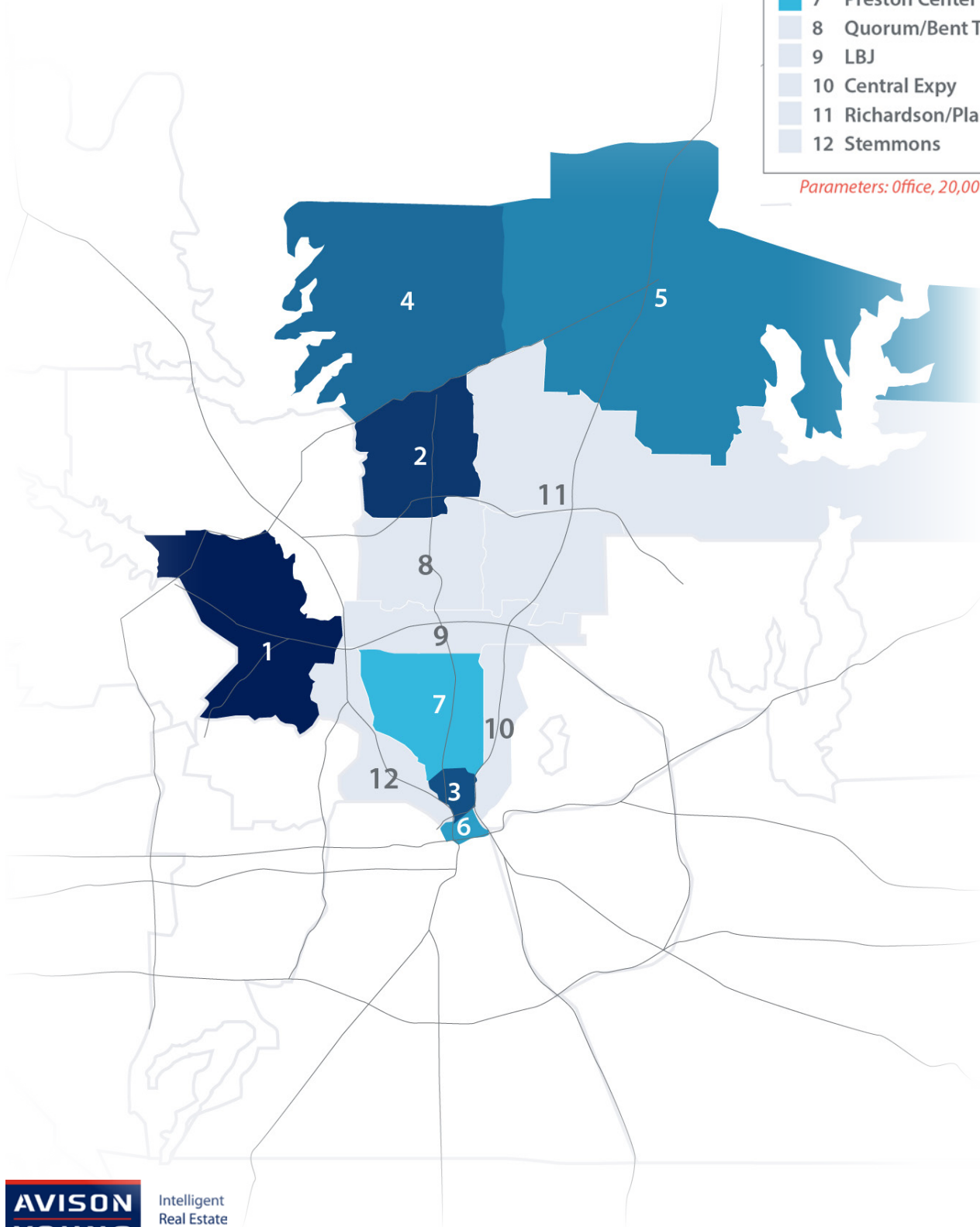
# Core Submarket Heat Maps

Q4 2018

## Under Construction: Class A

1	Las Colinas	2,041,400
2	Upper Tollway	918,387
3	Uptown	265,860
4	Frisco/The Colony	245,279
5	Allen/McKinney	165,000
6	Dallas CBD	163,025
7	Preston Center	119,000
8	Quorum/Bent Tree	0
9	LBJ	0
10	Central Expy	0
11	Richardson/Plano	0
12	Stemmons	0

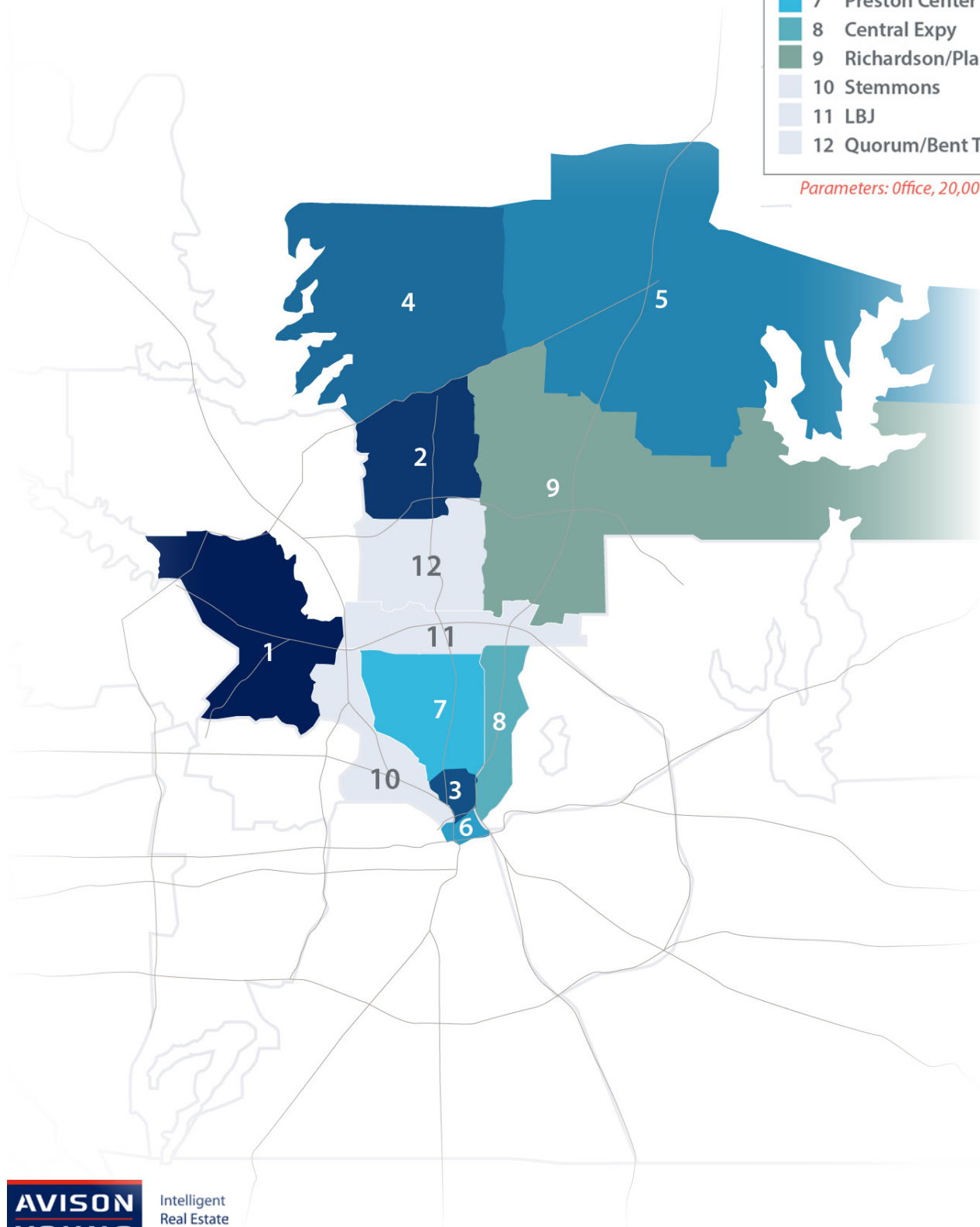
Parameters: Office, 20,000 SF+, Existing





# Core Submarket Heat Maps

Q4 2018



## Under Construction: Totals

1	Las Colinas	2,174,400
2	Upper Tollway	965,687
3	Uptown	265,860
4	Frisco/The Colony	265,507
5	Allen/McKinney	190,000
6	Dallas CBD	163,025
7	Preston Center	119,000
8	Central Expy	38,848
9	Richardson/Plano	20,000
10	Stemmons	0
11	LBJ	0
12	Quorum/Bent Tree	0

Parameters: Office, 20,000 SF+, Existing



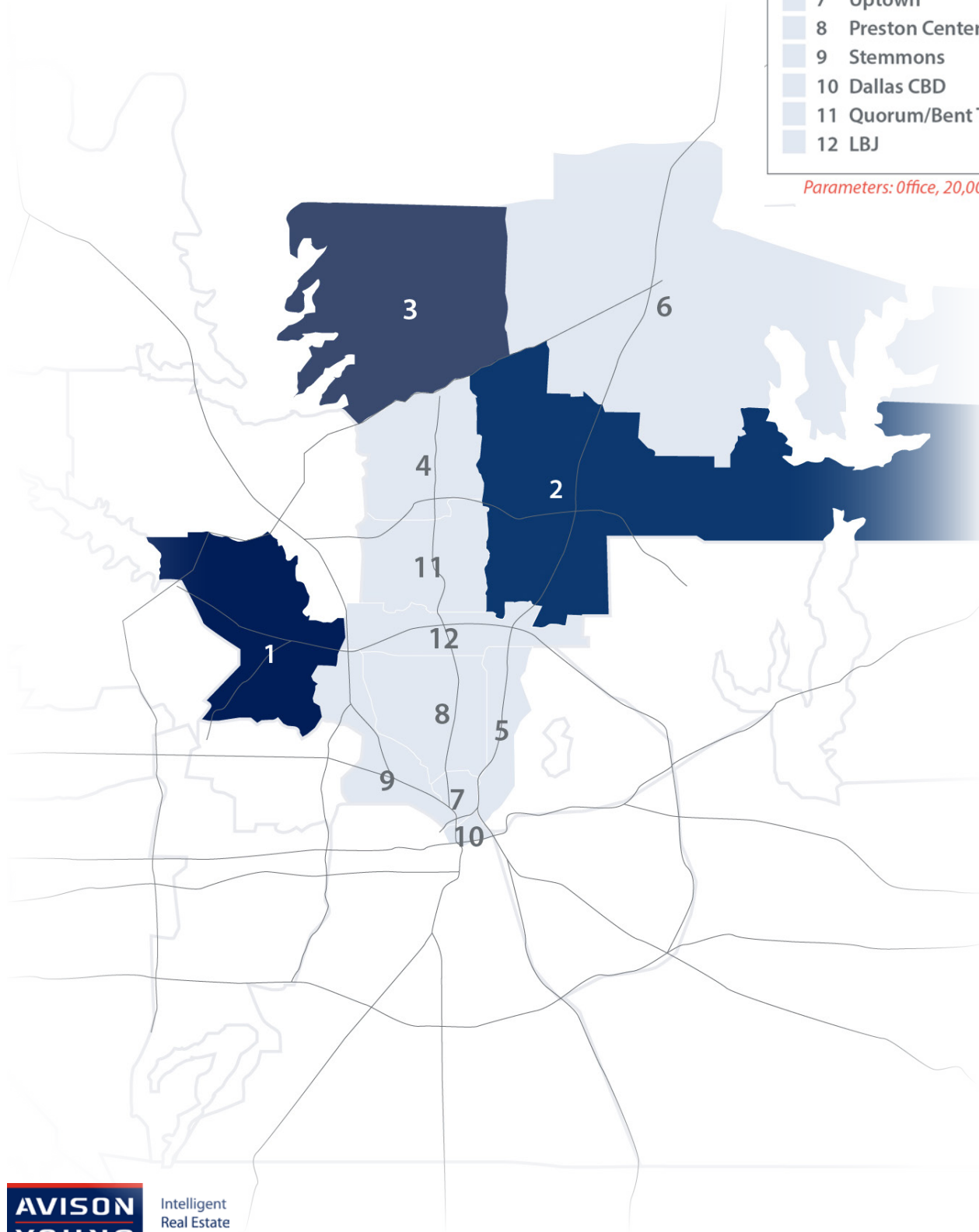
# Core Submarket Heat Maps

Q4 2018

## YTD Deliveries: Class B

1	Las Colinas	114,500
2	Richardson/Plano	79,278
3	Frisco/The Colony	26,126
4	Upper Tollway	0
5	Central Expy	0
6	Allen/McKinney	0
7	Uptown	0
8	Preston Center	0
9	Stemmons	0
10	Dallas CBD	0
11	Quorum/Bent Tree	0
12	LBJ	0

Parameters: Office, 20,000 SF+, Existing



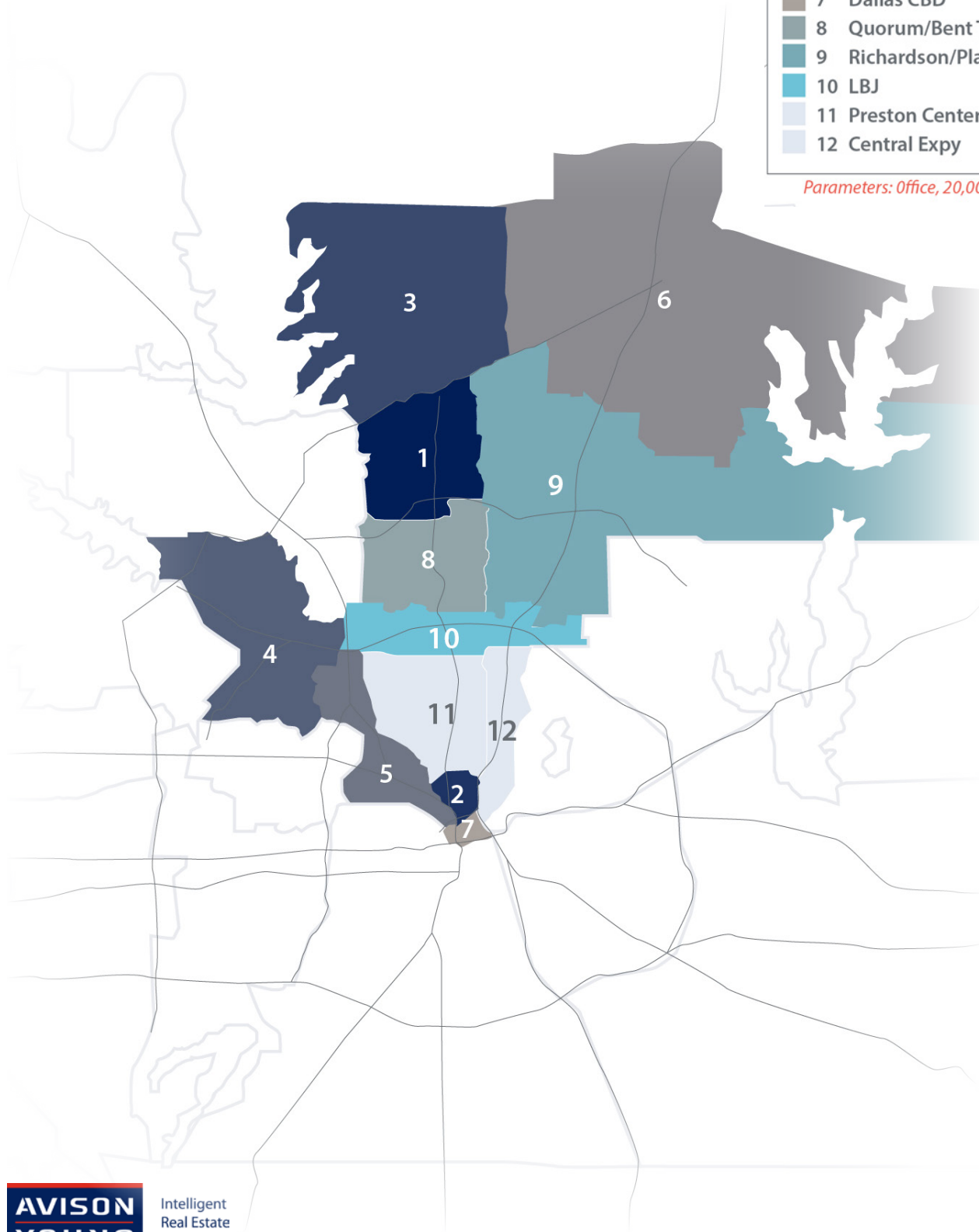
# Core Submarket Heat Maps

Q4 2018

## 2018 Deliveries: Class A

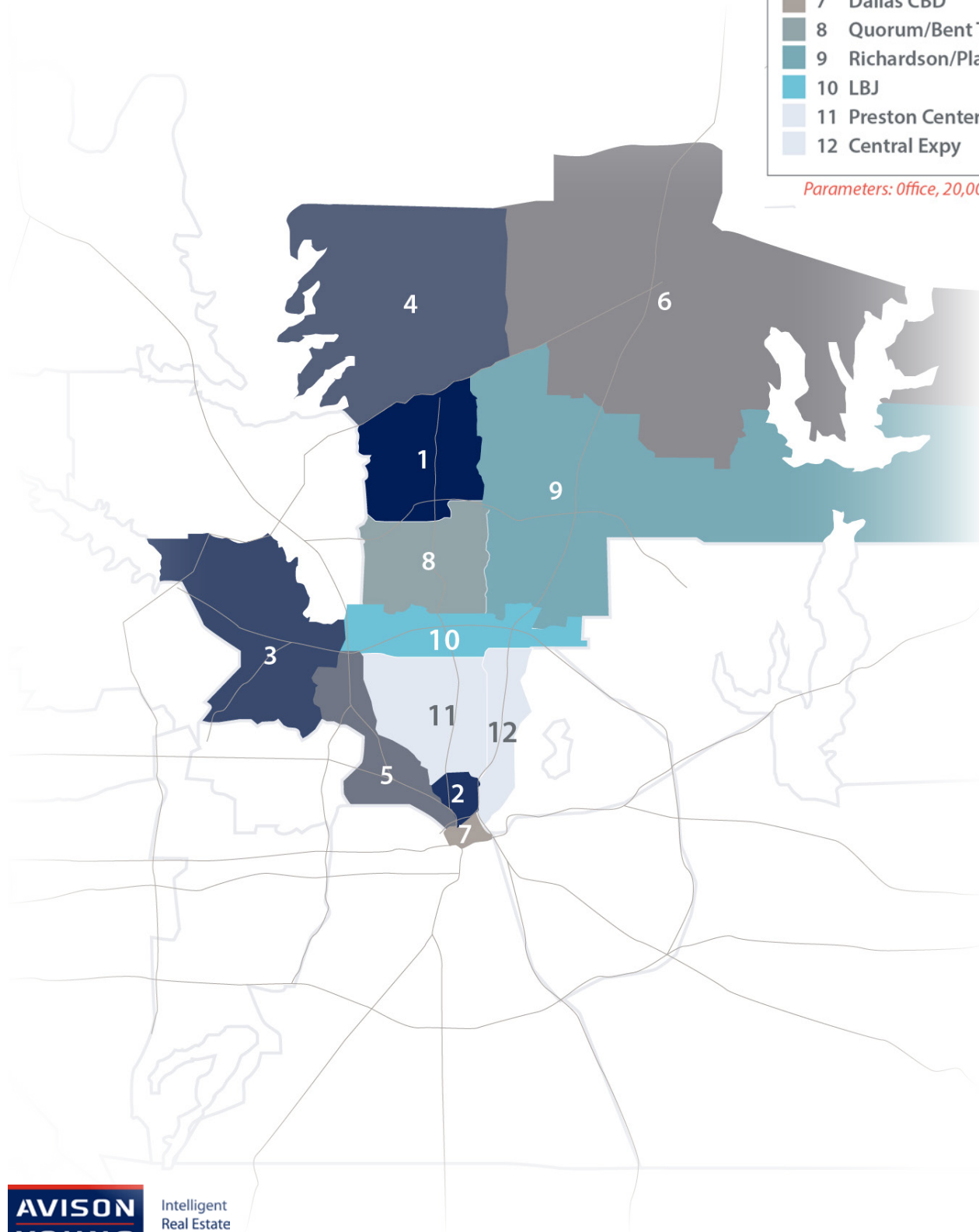
1	Upper Tollway	1,241,191
2	Uptown	1,044,988
3	Frisco/The Colony	689,743
4	Las Colinas	650,000
5	Stemmons	414,000
6	Allen/McKinney	362,026
7	Dallas CBD	261,400
8	Quorum/Bent Tree	249,564
9	Richardson/Plano	26,520
10	LBJ	20,001
11	Preston Center	0
12	Central Expy	0

Parameters: Office, 20,000 SF+, Existing



# Core Submarket Heat Maps

Q4 2018



2018 Deliveries: Totals		
1	Upper Tollway	1,241,191
2	Uptown	1,044,988
3	Las Colinas	764,500
4	Frisco/The Colony	751,869
5	Stemmons	414,000
6	Allen/McKinney	362,026
7	Dallas CBD	261,400
8	Quorum/Bent Tree	249,564
9	Richardson/Plano	117,458
10	LBJ	20,001
11	Preston Center	0
12	Central Expy	0

Parameters: Office, 20,000 SF+, Existing