

Kansas City, Missouri



Urban-Suburban Submarkets Trends

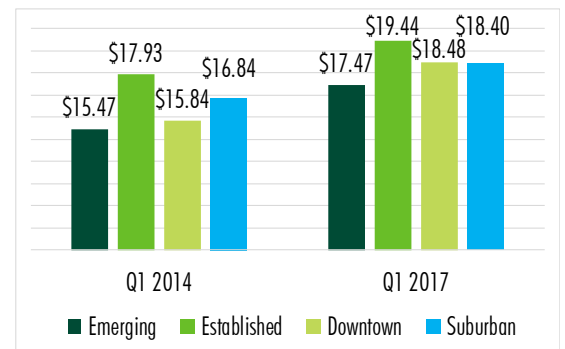
- The two established suburban live-work-play (LWP) markets are South Johnson County and North Johnson County. South Johnson County is the premier office market in Kansas City, with the highest rentable building area, historically has the top net absorption, and is the top submarket for retail. The largest new development in South Johnson County is Bluhawk, a 300-acre mixed-use project. It includes medical, retail, multifamily and single-family homes, an arena and office space. North Johnson County is second only to South Johnson County as an LWP area, with a population of approximately 240,000 and a cumulative five-year growth rate of 5.1%. North Johnson County's largest project is Lenexa City Center. It includes a relocation of Lenexa's City Hall, a large recreation center, two five-story mixed-use towers, more than 2,000 multifamily units, retail and office space.
- South Kansas City is emerging as an LWP area, largely due to the development of Cerner's Trails Campus, which recently completed the first phase of a 4.7 million-sq.-ft. office complex that will bring 16,000 new employees to the area. South Kansas City is also home to many corporate headquarters along the Ward Parkway Corridor, a considerable amount of retail amenities and a population of 126,000 with growth expected to accelerate as Cerner's campus continues to expand.

Urban-Suburban Submarkets

Established	Emerging
South Johnson County	South Kansas City
North Johnson County	

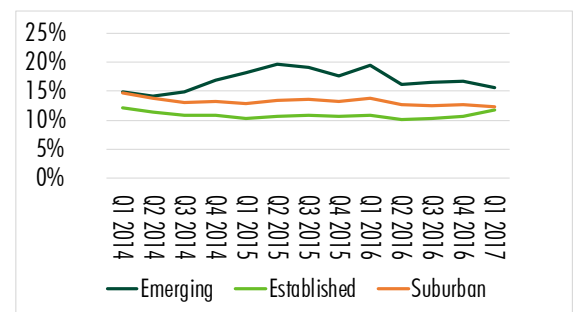
Source: CBRE Research, Q1 2017.

Three Year Lease Rate Change by Submarket Type



Source: CBRE Research, Q1 2017.

Vacancy Rate by Submarket Type



Source: CBRE Research, Q1 2017.

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