

Sacramento, California



Urban-Suburban Submarkets Trends

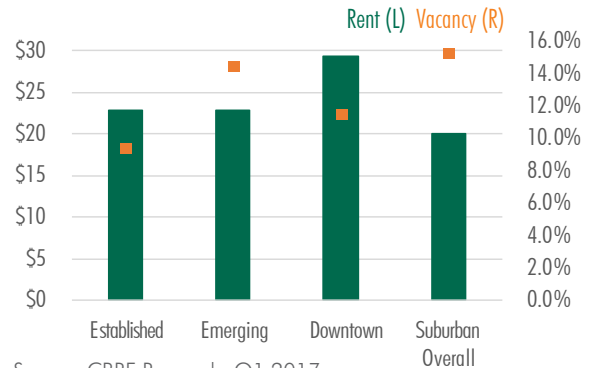
- As suburban submarkets have become more desirable, they have started to gain some of the key pieces that are needed to be considered an urban-suburban submarket. In the Sacramento market, the recent construction of the Golden 1 Center Arena has spurred both retail and multifamily construction that has made proximity to downtown an important factor in the desirability of a submarket.
- Midtown is the most desirable submarket as it has access to some of the best entertainment and restaurant options in Sacramento, while remaining close to Downtown. Midtown is also the most walkable of the established live-work-play submarkets.
- South Natomas also offers close proximity to Downtown and while it does not offer an urban living environment like Midtown, it has access to higher quality Class A office space that is not available in Midtown.
- Roseville is the farthest away from Downtown, but it ranks highly in living options, entertainment and office product.
- All three of the emerging markets (Campus Commons, Elk Grove and Hazel/Folsom) have not yet put together all the pieces to garner the title of established live-work-play submarkets. However, what these three submarkets have over other suburban submarkets is a pipeline of developments that will bring new LWP elements to these areas in coming years.

Urban-Suburban Submarkets

| Established | Emerging |
|---------------|----------------|
| Midtown | Campus Commons |
| Roseville | Elk Grove |
| South Natomas | Hazel/Folsom |

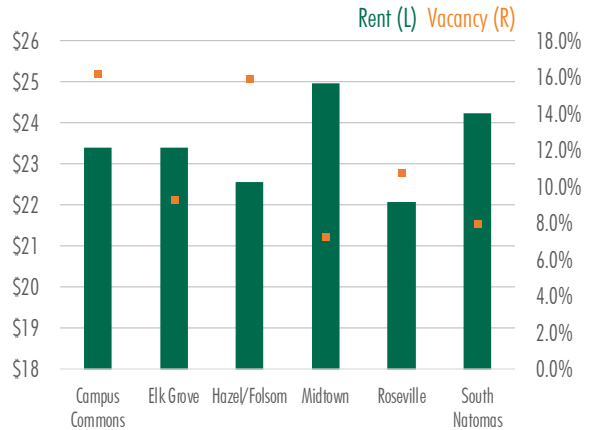
Source: CBRE Research, Q1 2017.

Q1 2017 Vacancy & Rent by Submarket Type



Source: CBRE Research, Q1 2017.

Q1 2017 Vacancy & Rent by Submarket



Source: CBRE Research, Q1 2017.

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