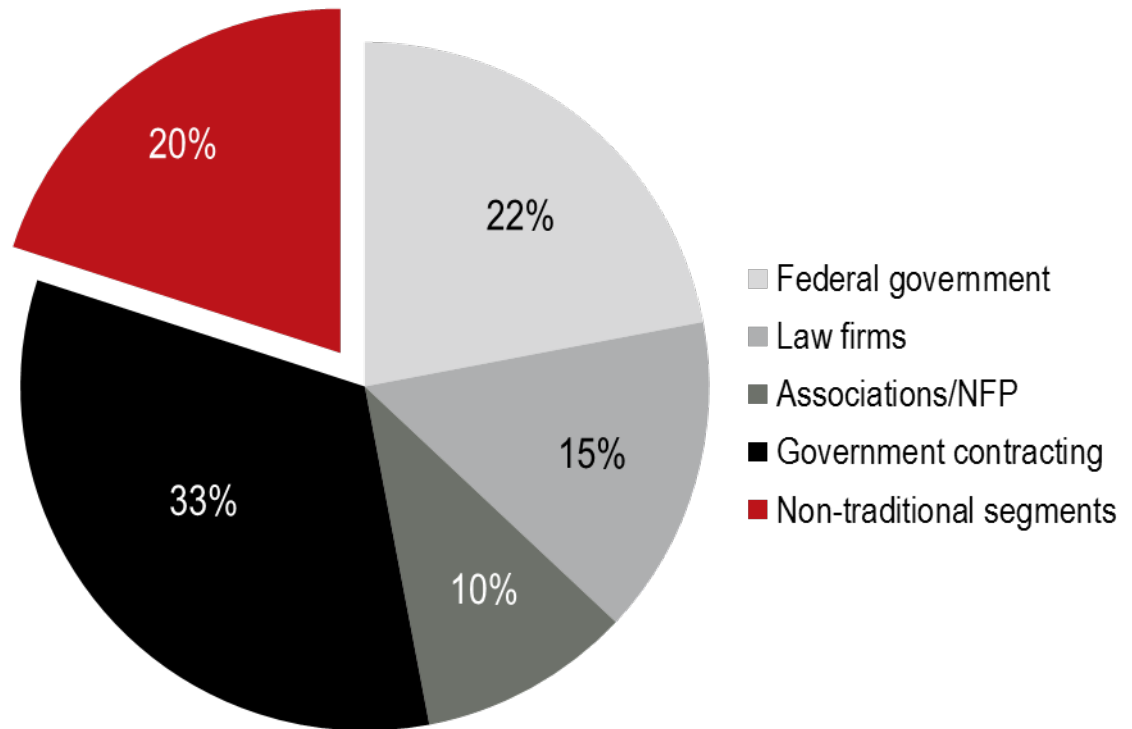




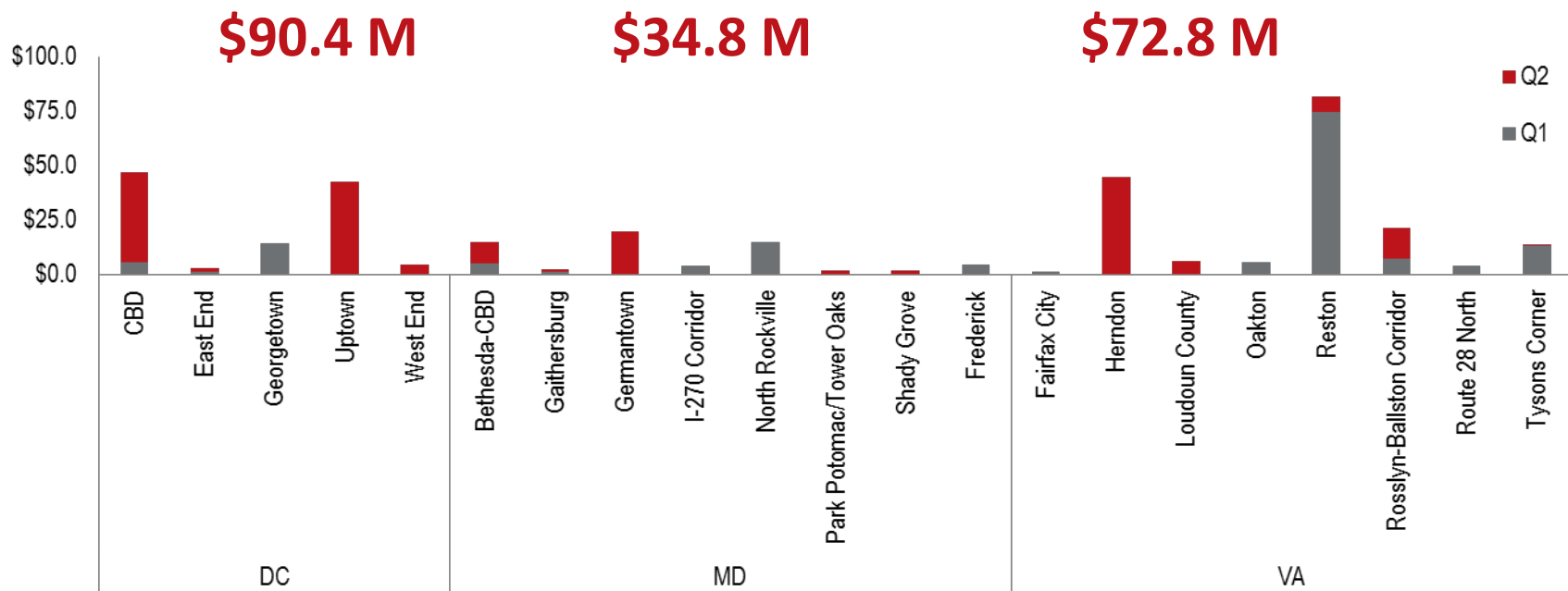
A new way to connect tenants and  
landlords

# Start-ups and technology companies fueling the new DC creative economy

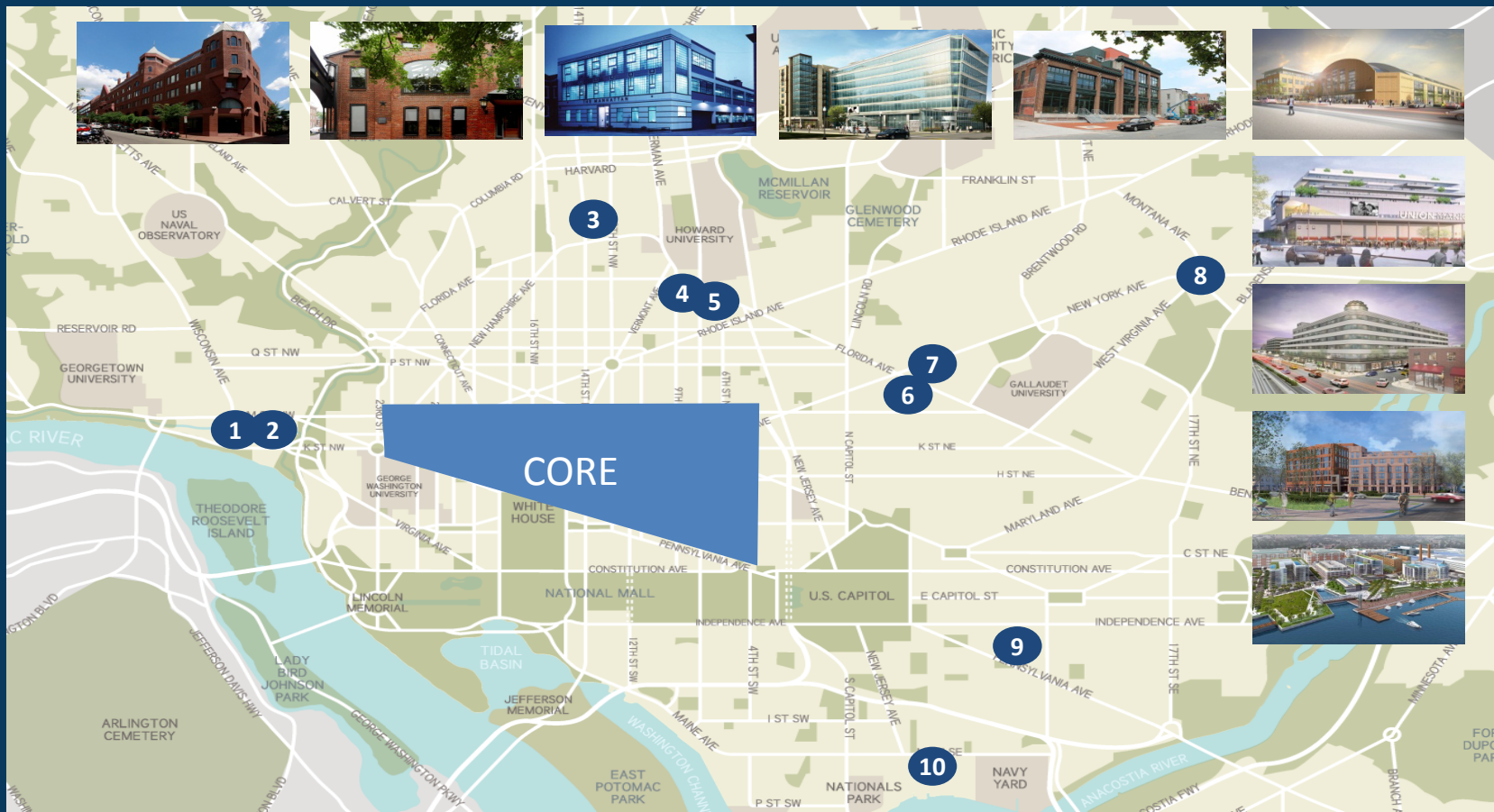


# Software and media companies captured over half of Metro DC's \$197.9 million in venture capital funding during Q2 2014

*Venture capital spending by submarket...*








# Growing appetite for non-traditional office locations





# Changing workplace models are impacting both government and private sector leasing

*Most organizations sit here* →

Cellular Space	Open Plan	Open Plan + Support	Hybrid Mobility	Full Mobility
<ul style="list-style-type: none"><li>Fully <i>assigned</i> offices and/ or high partition workstations</li></ul>	<ul style="list-style-type: none"><li>Fully <i>assigned</i> open plan workstations and/ or some offices</li></ul>	<ul style="list-style-type: none"><li>Fully <i>assigned</i> open plan workstations and support space</li></ul>	<ul style="list-style-type: none"><li>Mix of <i>unassigned</i> and <i>assigned</i> workstations and support space</li></ul>	<ul style="list-style-type: none"><li>Fully <i>unassigned</i> workstations and support space</li></ul>
 <p>250-300usf/person</p>	 <p>200-250usf/person</p>	 <p>150-200usf/person</p>	 <p>100-150usf/person</p>	 <p>50-100usf/person</p>

Increasing Choice, Efficiency, Flexibility and Cultural Integration

*But the biggest shift is here* →



# 77%

...of Millennials reports wanting to live in an urban core, not in the suburbs where they grew up. They want to be close to each other, to services, to places to meet, and to work, and they would rather walk than drive.

ULI "Housing in America" Report





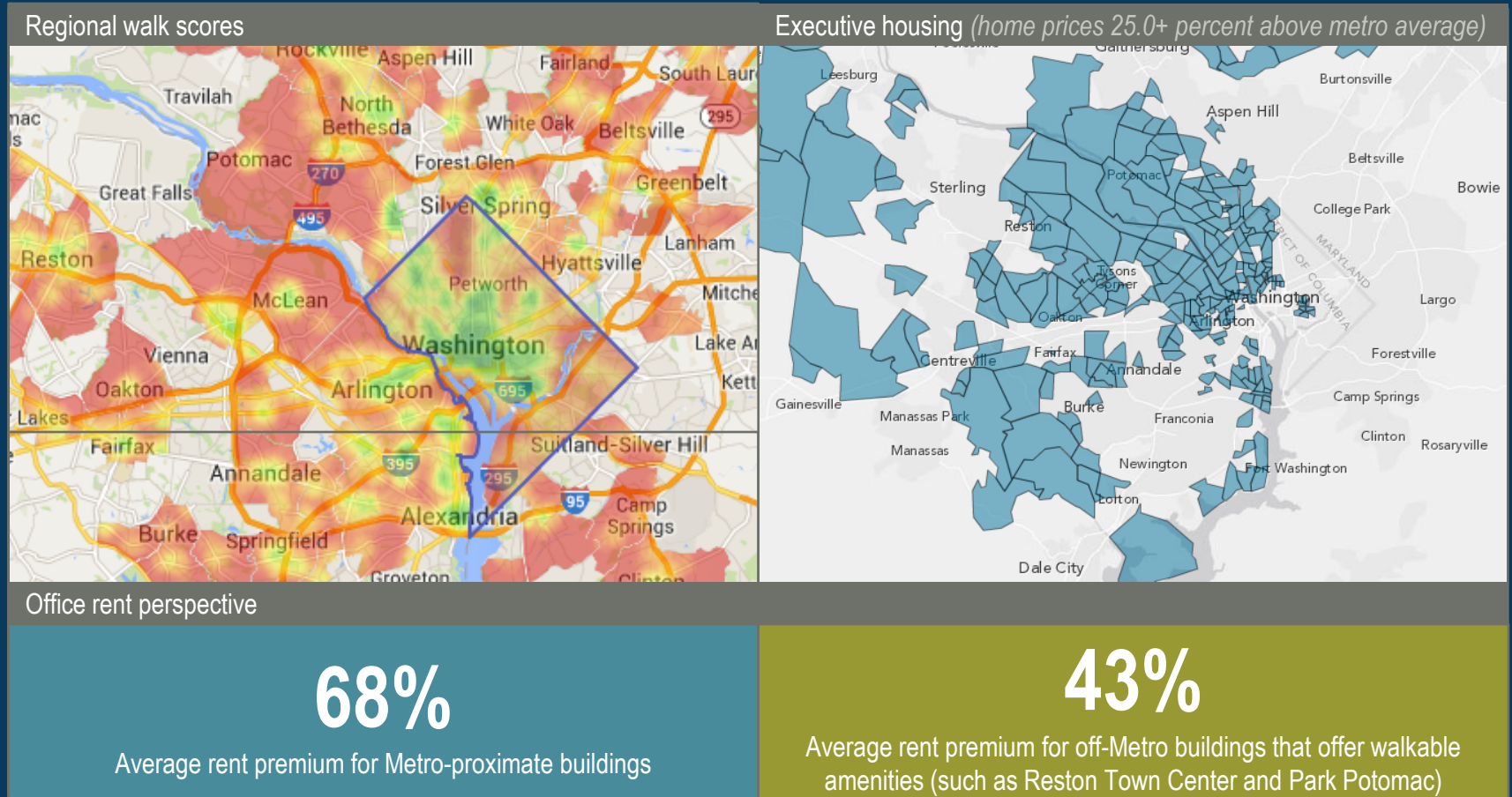
# 88%

...of new DC households are car free. Between 2010 and 2012, the number of car-free households in the District of Columbia grew by 12,612, largely due to the rise in Millennials, most of whom reported not owning a vehicle.

Source: U.S. Census Bureau American Community Survey



# Public transit access, walkability and proximity to the executive workforce drive rents and asset values





*Average  
US deal size*



*Average Fortune 500  
deal size*



*Average Fortune 500  
term length down*





*Average downtime for  
spaces <5,000 sf*

# Washington, DC metro tenants by occupancy

31,000

< 5,000 sf

6,100

> 5,000 sf



WHITE HOUSE

# Deals in 2013 DC Metro

*3,721 deals totaling over*

**8.8M  
sf**

*for spaces < 7,500*



WHITE HO

PENNSYLVANIA

I STREET

H STREET

L STREET

17TH STREET

RHODE ISLAND AVENUE

DESALES STREET

CONNECTICUT AVENUE

18TH STREET

19TH STREET

20TH STREET

21ST STREET

22ND STREET

23RD STREET

24TH STREET

25TH STREET

26TH STREET

27TH STREET

28TH STREET

29TH STREET

30TH STREET

31ST STREET

32ND STREET

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302ND STREET

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309TH STREET

310TH STREET

311ST STREET

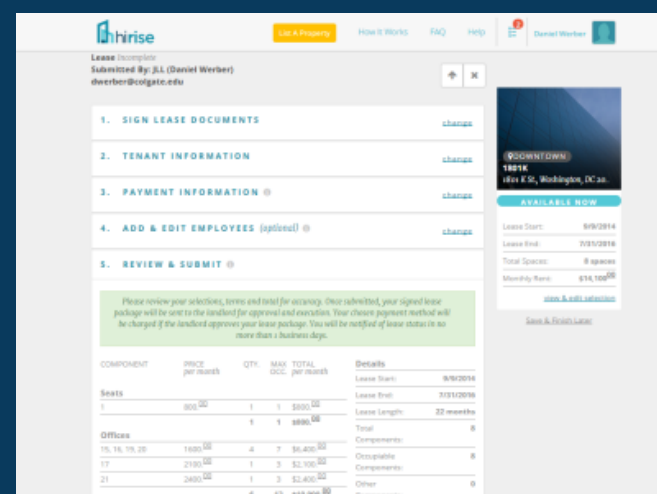
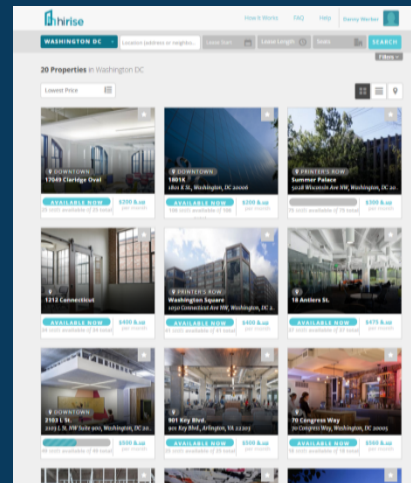
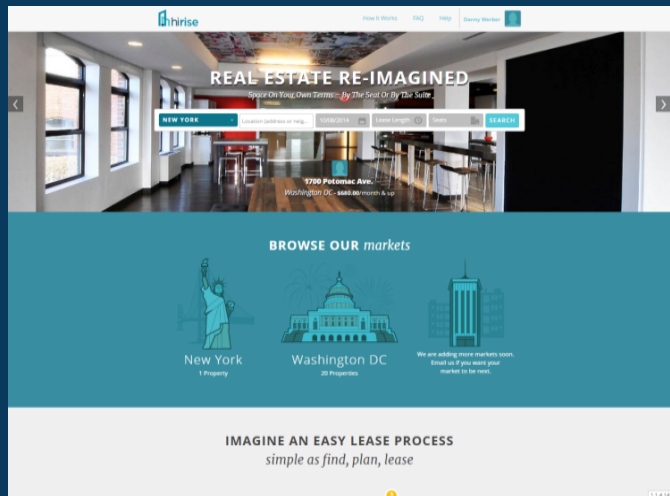
312ND STREET

313RD STREET

314TH STREET

3

# HiRise: from search to execution





A new way to connect tenants and  
landlords

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