



amazonDMV

A Winning Partnership

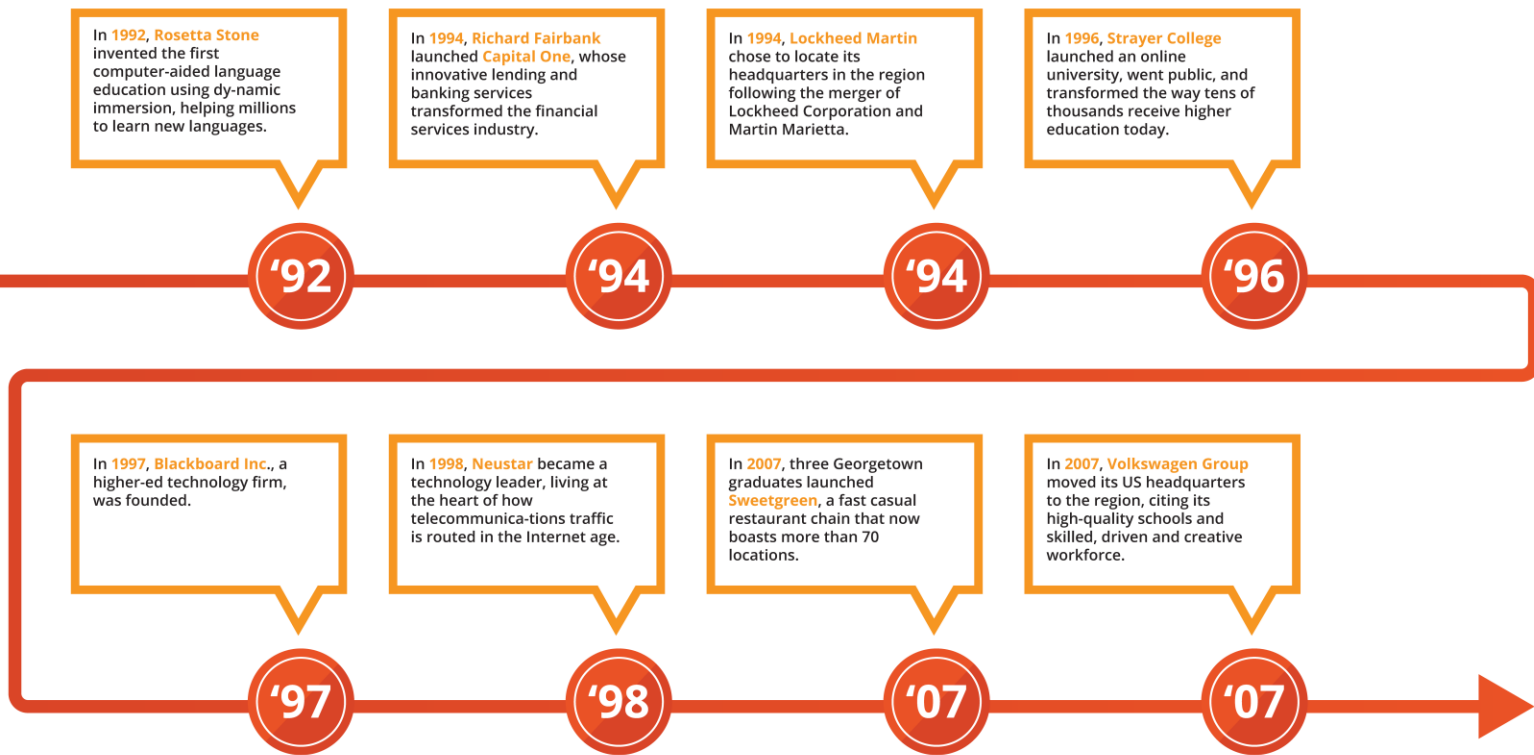
The Greater Washington area: a region for growth and opportunity; transforming and transformed; a perfect home for AmazonHQ2, today and tomorrow.

There are four dimensions that combine to set Greater Washington apart from any other region – the intertwined network of intimate neighborhoods; the beacon for entrepreneurs and businesses; the home of the Federal Government; and the gateway to the world.

This is why major companies from Yelp and Marriott to Nestle have made and continue to make the Greater Washington area their home. They recognize the unique value of these four dimensions in one region. They see the unique opportunity to harness the talent that flocks to this region to bring change, disrupt and achieve. They recognize that there is no place in this country quite like it. This is why Greater Washington is the ideal location for Amazon HQ2—and why Amazon will further transform our region in ways that will capture the imagination of the entire country and the world.

The region – through both its people and its companies – has become a hot bed for innovation. The Internet itself was born here at the Defense Advanced Research Projects Agency (DARPA). America Online launched its signature dial-up service and became an Internet pioneer, spawning a local tech industry much like the one that emerged in Seattle after the explosive growth of Microsoft. High-tech government contractors like Booz Allen Hamilton, CACI and Leidos made their homes here. Marriott re-formed as an international corporation and became the first to offer online reservations. Discovery and National Geographic became pioneers in developing specialized multi-mode edutainment programming. Gannett, whose USA Today had just become the most read newspaper in the country, launched both online and internationally and changed the face of news forever.

Over the past two decades, these successes inspired more innovative companies to start or move to the Washington area:



In total, the Greater Washington area has become home to more than 1,000 technology startups and 2,000 biotechnology companies, who together are both transforming the local economy and changing lives around the world.

Fueled by, and fueling, this growth is a 35% rise in population that is overwhelmingly through international migration and natural increase among current residents.

Today, a new arrival to Washington is much more likely to come from outside the U.S. and come seeking a high technology job, enticed by a large and diverse regional community that is safe, stable, prosperous and welcoming. Over 23% of the regional population is foreign born, bringing a depth of diversity that makes the region not just a microcosm of America – but a microcosm of the world.

There are great schools, open spaces, beautiful landmarks and accessible museums. The central core is vibrant, thriving and home to a diverse tapestry of local neighborhoods with both long-term residents and new professionals. The suburbs host strong commercial centers and urban-style communities and the exurbs are connected by a strong infrastructure supported by a growing number of public transportation options and innovative traffic solutions for drivers, rail riders, bikers, walkers and ride-sharers.

It is very common today to hear radio and television hosts, and even citizens walking the streets of our region, colloquially refer to the Greater Washington area as the DMV. Most people think this means District, Maryland and Virginia. That may be true, but there is also another meaning.

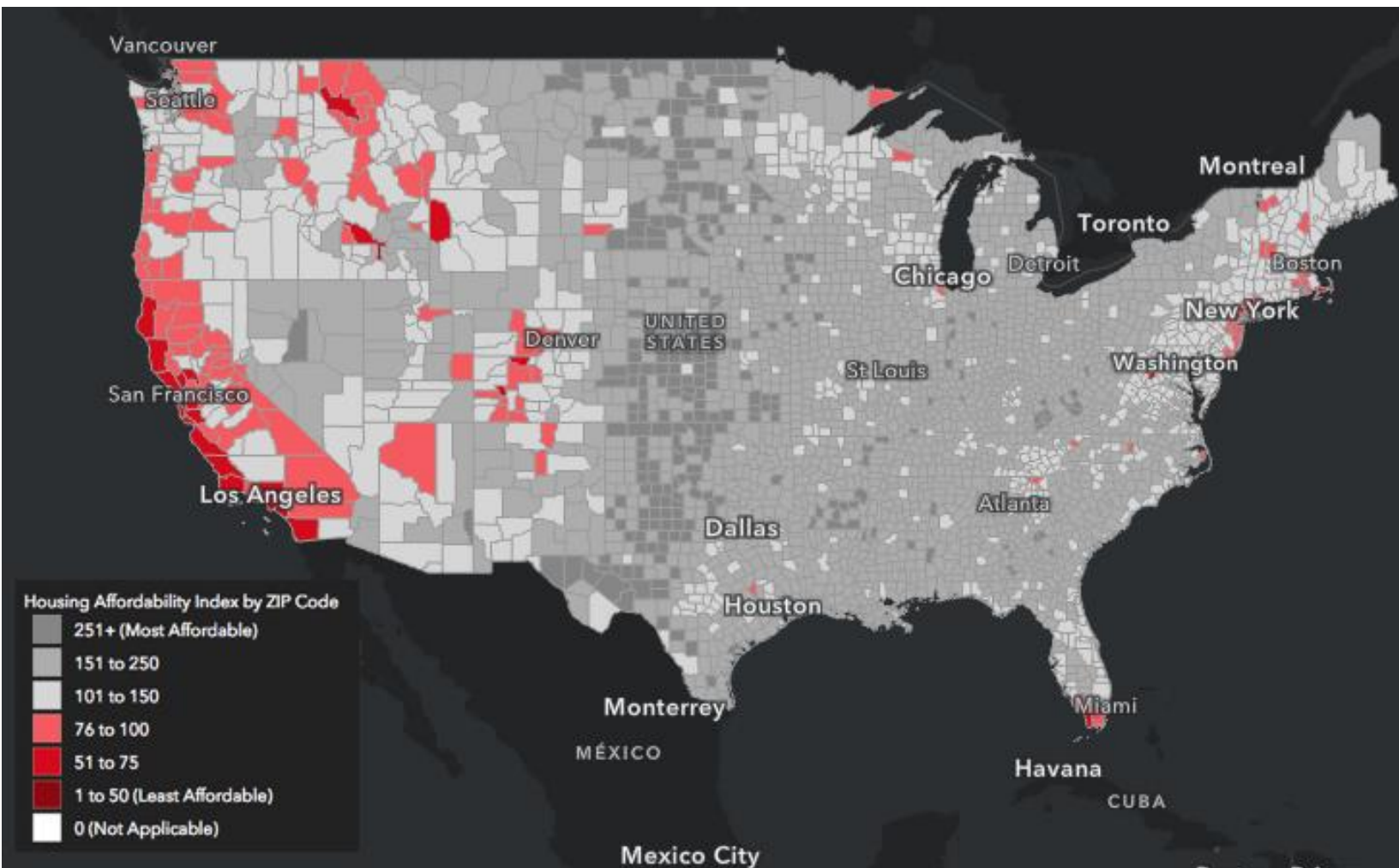


DEPENDABLE

While the D in the DMV can stand for several things about our region including diverse or dynamic, the dependability of our region is one of the strongest attributes that will play a role in powering Amazon's success in the Greater Washington area. The region boasts a strong economic foundation that is steadily growing, but with a level of stability borne from both significant economic diversity and being the home of the Federal Government. This diversity mitigates the higher risk that many other less diverse local economies face. With a regional GDP of over \$500 billion, nearly 55% higher than Seattle, if the Washington area were a country its economy would be the size of Sweden's.

The region's dependable growth has fueled the development of numerous urban and suburban hubs featuring various multi-modal transportation options, sustainable designs, cultural attractions and diverse living options. The region has a dependable housing market with plentiful inventory at very stable costs. At an increase of only 8 cents per square foot over the last four years, renting a home or apartment is far less expensive than most other East

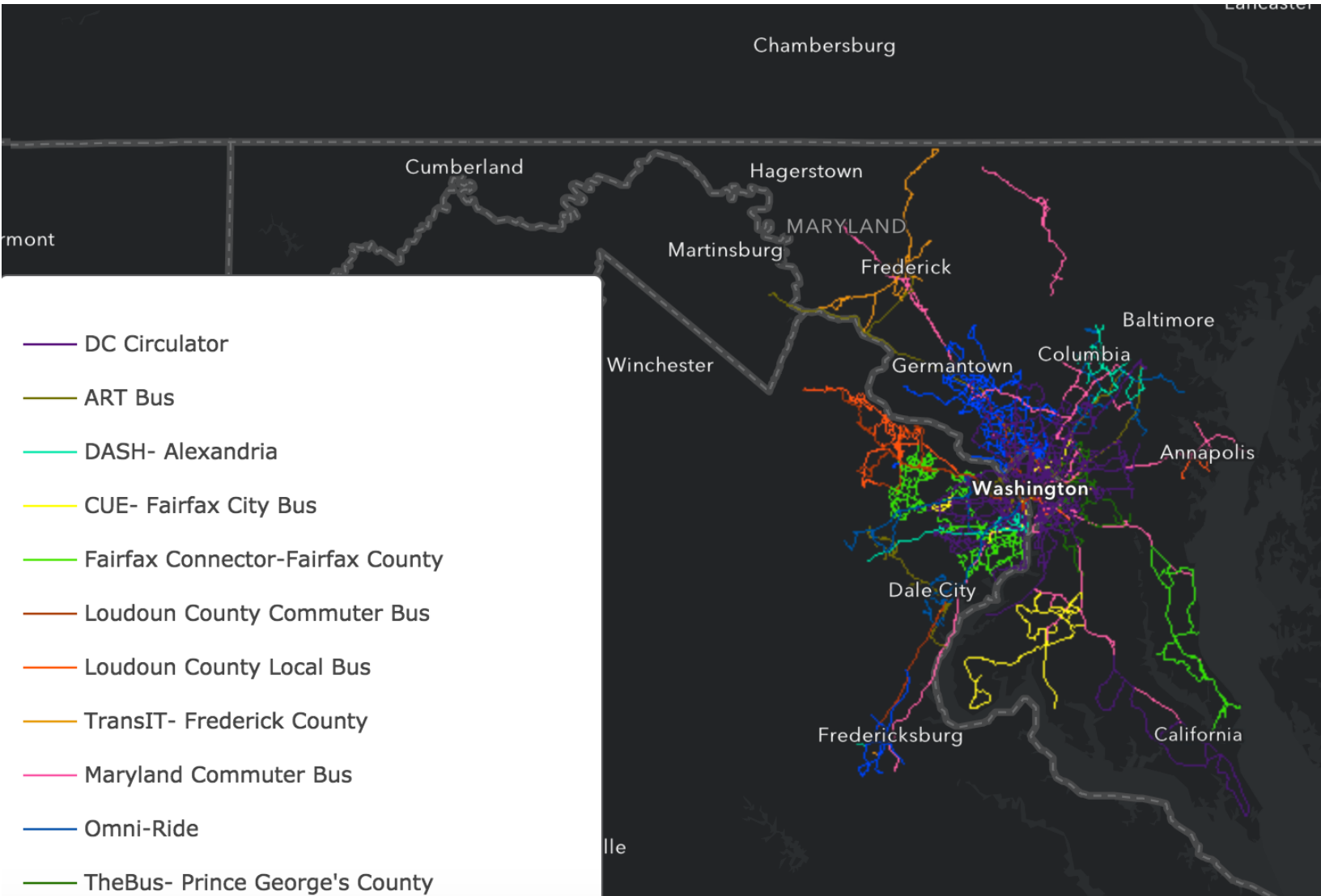
Coast cities. Housing affordability overall, as measured by the ratio of median income to median home price, is better than both West Coast and most Northeast metro areas.



Housing affordability overall, as measured by the ratio of median income to median home price, is better than both West Coast and most Northeast metro areas.

This ubiquitous mix of diverse and affordable housing gives the Greater Washington area’s residents a wide range of living options that conform to personal tastes and shape a high quality of life. Some choose to live in mixed-use communities that have sprung up around major public transit hubs and provide easy access to all the region has to offer. Others live in planned suburbs and urban neighborhoods that offer good schools, parks, youth clubs and sports leagues, active community centers and nearby highways. There is a growing number of both single young professionals and families choosing to live in the urban core and mixed-use suburban developments and in modern, remodeled apartments or refurbished town homes a short walk or bike from work or play. There are even rural options, offering larger plots of land and larger homes.

In addition to the housing mix, the Greater Washington area's dynamic town centers, open spaces and free museums alongside an enviable proximity to beautiful beaches, wineries, farmland, picturesque mountains, the beautiful Chesapeake Bay, charming towns and some of America's most important historic landmarks make it a great place to raise a family.



The region boasts a wide network of regional and commuter and recreational transit options.

Metro System Map

wmata.com
 Customer Information Service: 202-637-7000
 TTY Phone: 202-962-2033
 Metro Transit Police: 202-962-2121

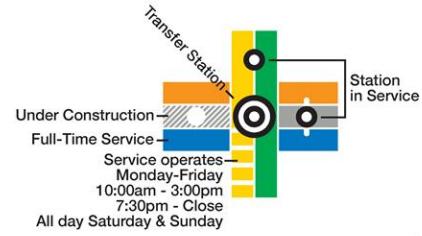
Legend

- RD** Red Line • Glenmont / Shady Grove
- OR** Orange Line • New Carrollton / Vienna
- BL** Blue Line • Franconia-Springfield / Largo Town Center
- GR** Green Line • Branch Ave / Greenbelt
- YL** Yellow Line • Huntington / Mt Vernon Sq / Fort Totten
- SV** Silver Line • Wiehle-Reston East / Largo Town Center

Station Features

- Bus to Airport
- Parking
- Hospital
- Airport

Connecting Rail Systems

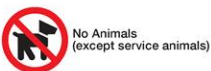


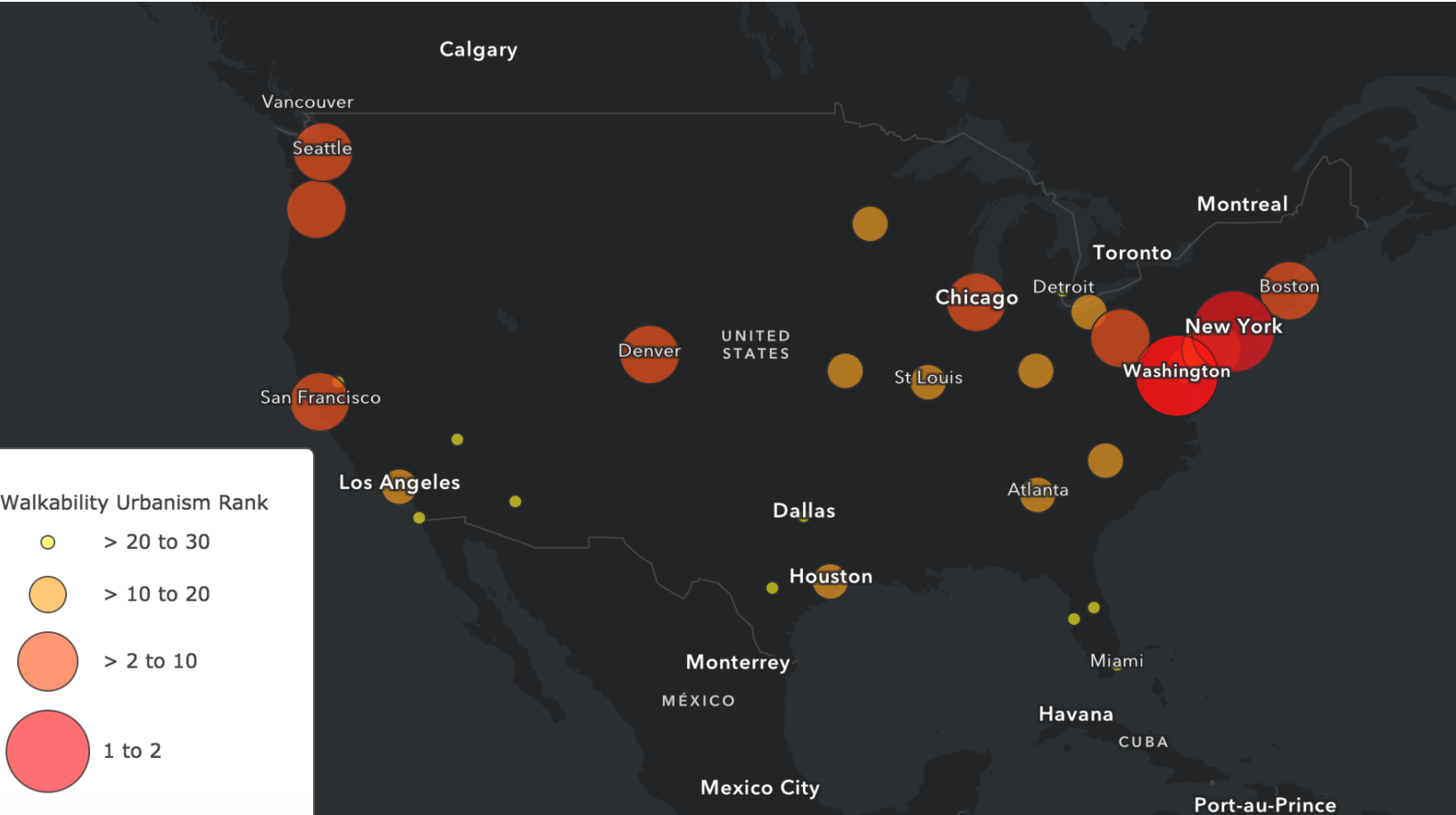
Metro is accessible.

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY © 2017

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 Map is not to scale

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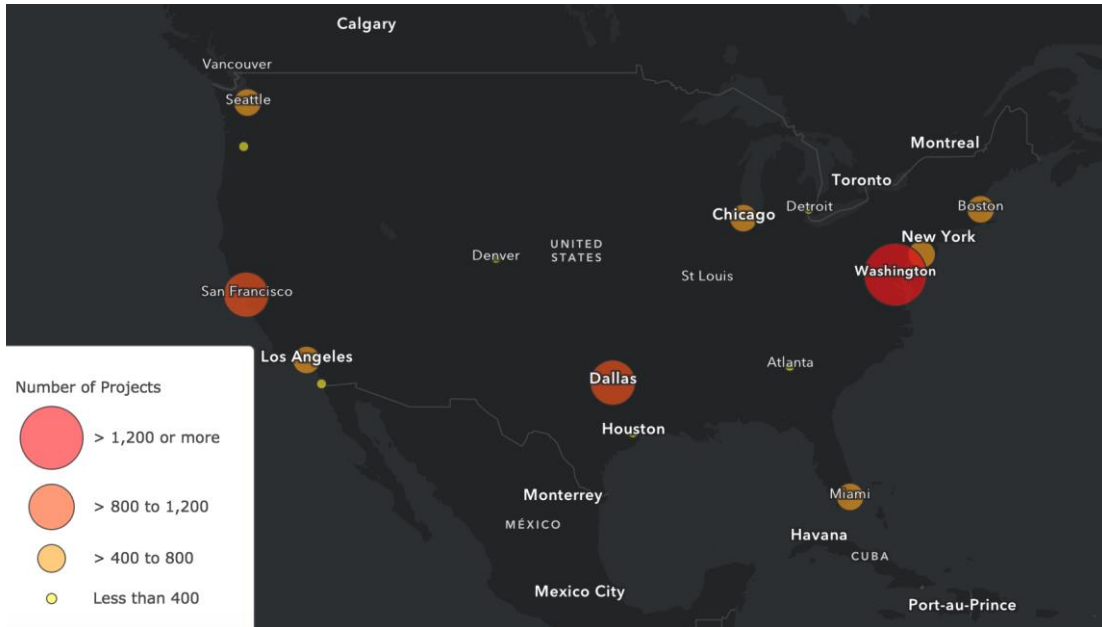
The region ranks in the top two Metropolitan Areas when measured by the current percentage of occupied walkable urban office, retail, and multi-family rental square feet in their “WalkUPS” – walkable urban places, compared to the balance of occupied square footage in the metro area

Whether living in a rural, suburban or urban community retail, office and recreational space is fully accessible through a region-wide road system, commuter rail, local metro, a ride on one of the many commuter bus lines or by foot.

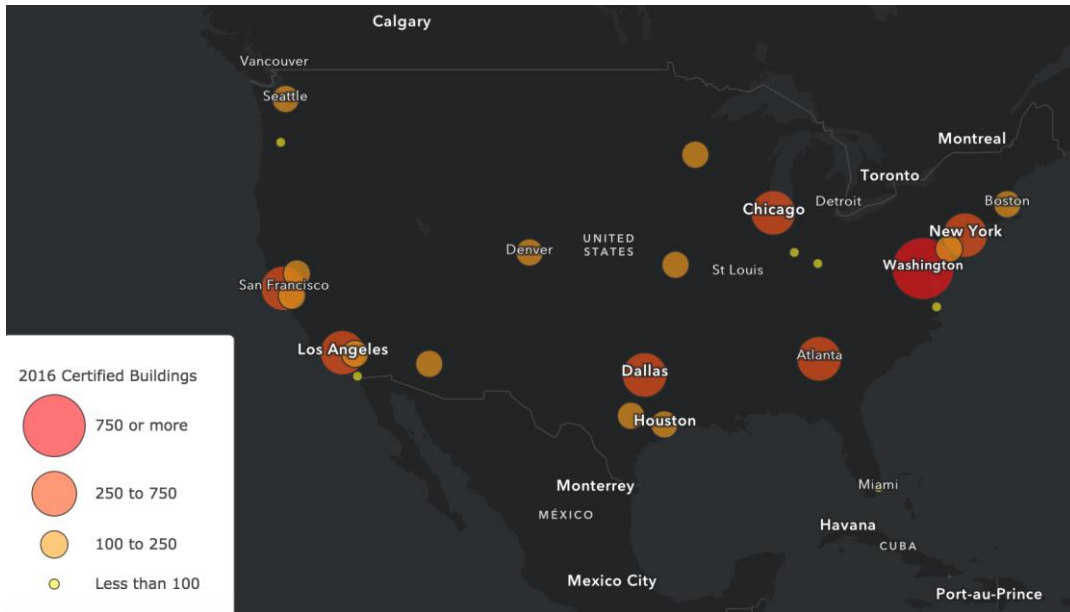
The region is home to one of the top two transit systems in the nation, Metro, which powered nearly 180 million rail and over 120 million bus trips in 2016 alone. Metrorail and Metrobus serve over 4 million people, reaching a 1,500-square mile area. Metrorail itself is 118 miles long with 91 stations serving the region with 100% accessibility to people with disabilities. By 2017, wireless service was available at all Metrorail stations, including 50 underground stations and the underground tunnel system on three lines.

The Maryland Area Regional Commuter (MARC) rail service has a daily ridership of over 40,000 commuters and the Virginia Railway Express (VRE) serves another 23,000 daily riders. In addition to the robust Metrorail and Metrobus, the Washington metropolitan area ranks as one of the top two most walkable metro areas with 33% of office, retail or multi-family space located in a walkable area.

The Greater Washington area has safe and well-maintained bike and running trails, many of which were built on old rail lines that connected this region's communities to facilitate commerce back in the 19th century. Those economic arteries now serve to power a new community priority – health and wellness. The Washington region is a top 10 market in the nation for its percentage of commuters who bike to work, and this year's 16th annual bike to work day attracted nearly 19,000 participants.



The Greater Washington Area boasts 1,559 LEED Certifications, far surpassing other MSAs



EPA's annual Top Cities list shows which metro areas were home to the most ENERGY STAR certified buildings in the previous year. The Greater Washington area ranks a strong #1 with a stronger economies, healthier communities, and cleaner air than any other MSA.

Public health is only one of the region's important priorities. Residents can also count on a diverse energy supply matched with top ranked energy efficiency to create a reliable energy grid and extremely clean air and water. The Washington area has the most LEED certified commercial buildings of any MSA – nearly 1,600 – and the most ENERGY STAR certified buildings in the nation. The region's energy suppliers can also provide renewable electricity to Amazon, such as already demonstrated through the renewable energy contract and rate schedules for Amazon's data center, or through other new synthetic power purchase agreement offerings. Additionally, the region has expertise in delivering new district energy and microgrid technologies, with multiple projects now in development.

These investments in preserving the local environment have delivered robust results. The region last year did not have a single "Code Red" day where air quality limited activities and 90% fewer days where pollution affected vulnerable populations than it did a decade ago. Soon, the Greater Washington area will have no unhealthy air days for anyone. Improvements in the levels of nitrogen and phosphorous discharges into the region's waterways have been reduced so significantly that the Chesapeake Bay and the region's beautiful rivers are accessible for sport, recreation and development. Stand by the shores of the Potomac or the banks of the Bay any morning and you will see rowing teams shaving seconds off their times, fishermen bringing in the day's catch and sailors quietly sweeping over light chop.

The Greater Washington area also provides for a high level of resiliency of operations. The District of Columbia is situated inland from the coast and the region is in a part of the country that is less susceptible to natural disasters. The region's infrastructure owners are making the large investments to ensure that their systems will provide reliable service to their customers. As the home of the Federal Government, it is also exceptionally well-fortified and protected from all manner of security threats.

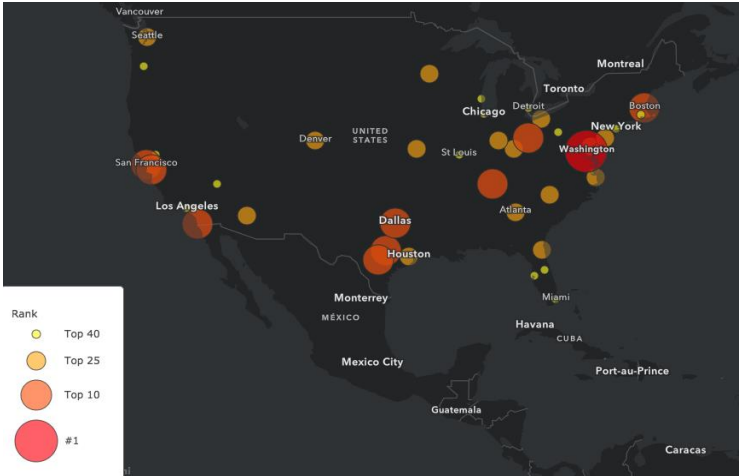
In total, the stable and growing economy, available housing, multi-modal transportation system, unmatched sustainability and a vibrant and diverse blend of cultural, recreational and fitness resources deliver an unparalleled quality of life for Greater Washington area residents. Its healthy, happy citizens enjoy a dynamic and resilient labor market, one of the nation's lowest unemployment rates, and career opportunities at all levels.

For Amazon, Greater Washington's dependability will deliver sustainability for its business long into the future. It will be able to rely on a stable and reliably growing economy and workforce, a well-planned and improving infrastructure, security from all manner of threats, and a redundant hub right in the center of the opposite coast that will allow for business continuity without disruption.



MATCHLESS

Given the great symbiotic relationship Amazon has shared with Seattle since its founding in 1994, the company’s second headquarters must be placed in a site that will best fuel the growth and development of its business over the next two decades and beyond. The Greater Washington area will deliver matchless opportunity.

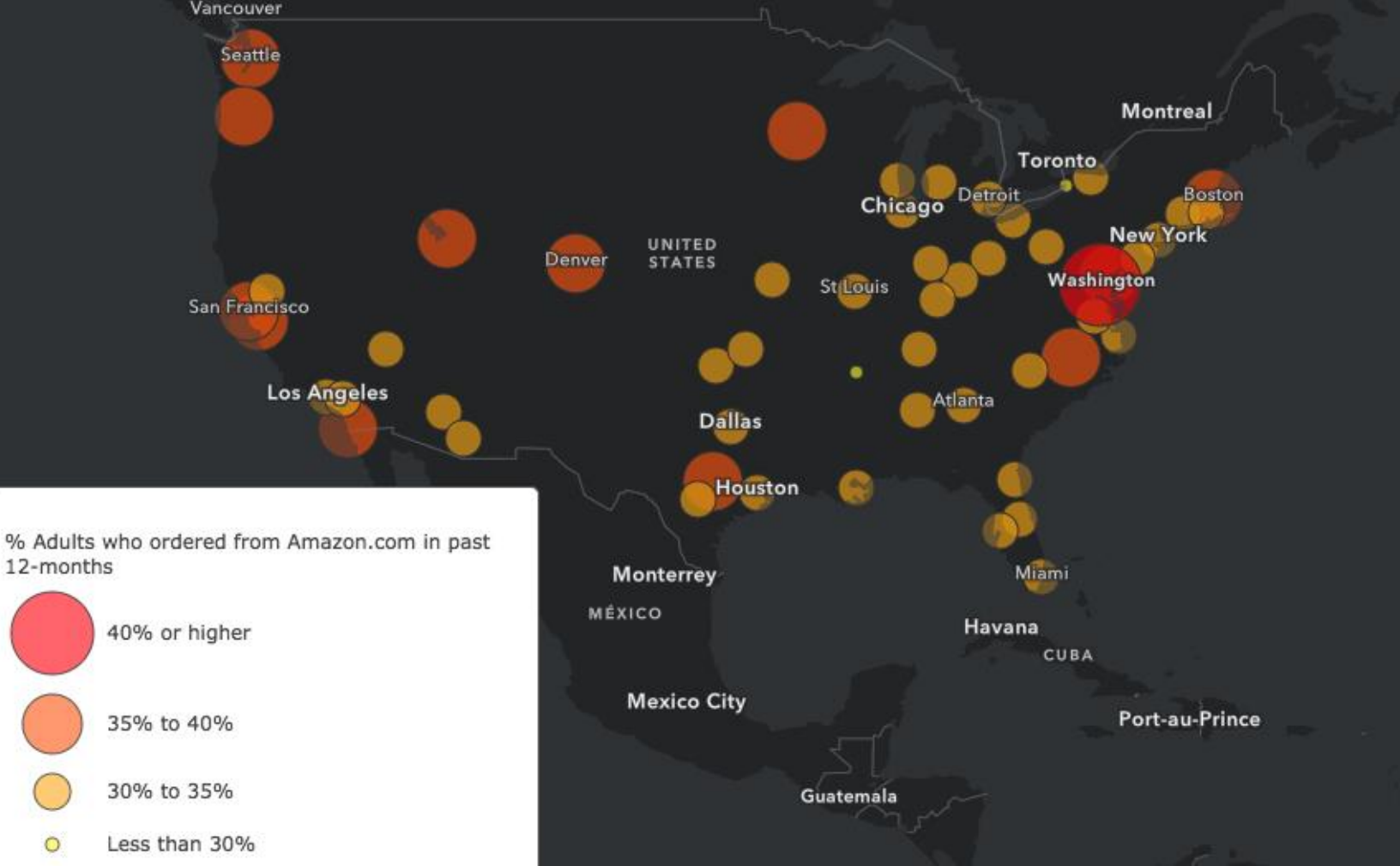


The Greater Washington area comes in #1 for “Growth Entrepreneurship” and #1 for “Highest Density of High-Growth Companies in IT Services”

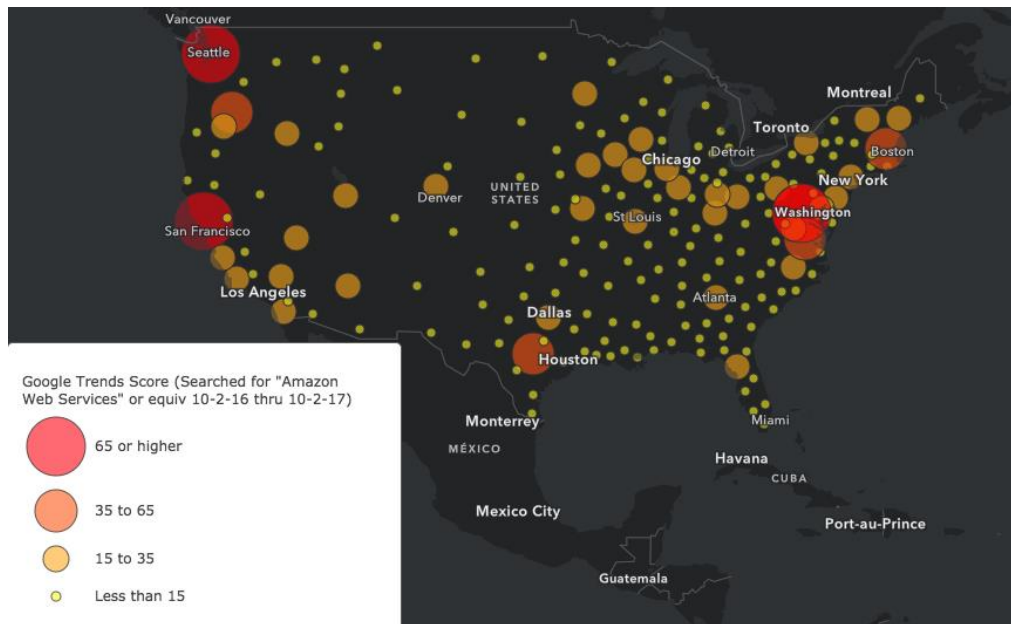
The Greater Washington area offers tremendous opportunities for Amazon to plug into a robust network of entrepreneurial businesses and thinkers in the technology sector, each of whom could represent partnership, acquisition or joint venture opportunities. No other region in the country has more companies focused on growth entrepreneurship. The region also has the highest density of high-growth companies in IT services. While other parts of the country may get recognized as leading areas for entrepreneurship, the Greater Washington area exceeds Boston, Los Angeles, San Francisco, San Jose, Austin and all the rest when it comes to shaping future technology-enabled business models.

The region is home to both the Northern Virginia Technology Council (NVTC), the largest technology council in the nation serving more than 1,000 companies and organizations and the Maryland Technology Council (MTC) which represents an additional 600 members and aims to position the state as a top-three innovation economy. Dozens of incubators focusing on market disruption, such as 1776, the Montgomery Business Innovation Network, the Prince George's County Technical Assistance Center and the Mason Enterprise Center also call this region home – working with a range of start-ups to solve the problems of tomorrow. In 1985, the region saw the launch of the Center for Innovative Technology (CIT), a non-profit corporation whose mission is to help entrepreneurs launch and grow high technology companies and facilitate partnerships between these start-ups and advanced technology consumers. These groups work closely with the Mid-Atlantic Venture Association (MAVA), which for 30-years has represented the interests of more than 100 venture capital firms with more than \$90 billion of capital collectively under management.

Supporting this robust technology industry is a highly developed information technology infrastructure that includes data centers, fiber optic connections, federal laboratories, public and private research and development centers, and more. This public-private success story of the internet, created by DARPA and popularized for consumers by America Online, is a metaphor for the whole region – a dynamic place where technology, education, research, entrepreneurship, commercialization and support seamlessly blend into a tapestry of partnerships, joint initiatives and dynamic business models.



The Greater Washington area is the epicenter of Amazon.com customers with nearly 2 MILLION adults who have ordered online in the past 12 months. Nearly 41% of all adults are Amazon.com customers, more than any other MSA.

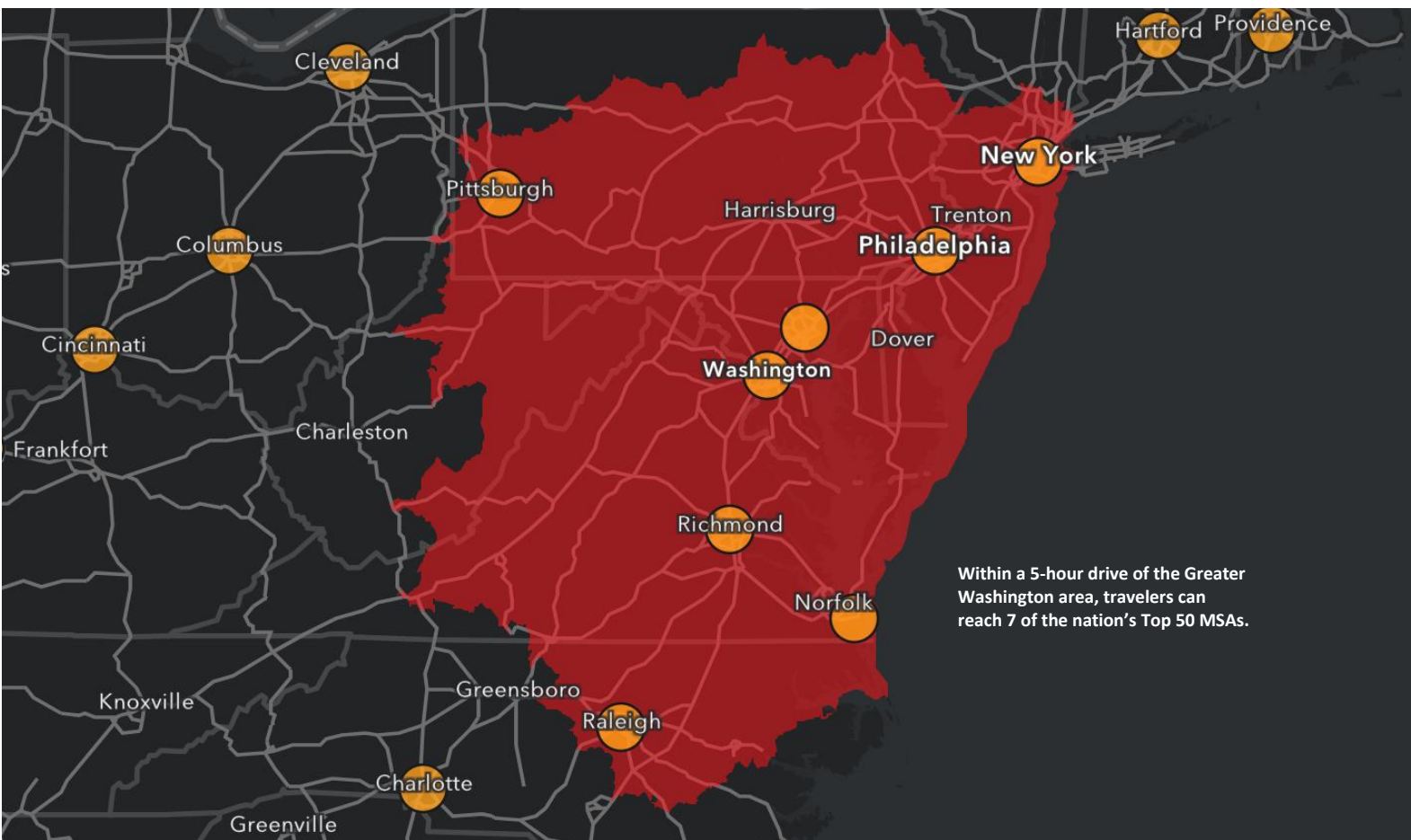


More people in the Greater Washington area searched the keywords "Amazon Web Services", "AWS", and "Amazon AWS" than any other city east of the West Coast.

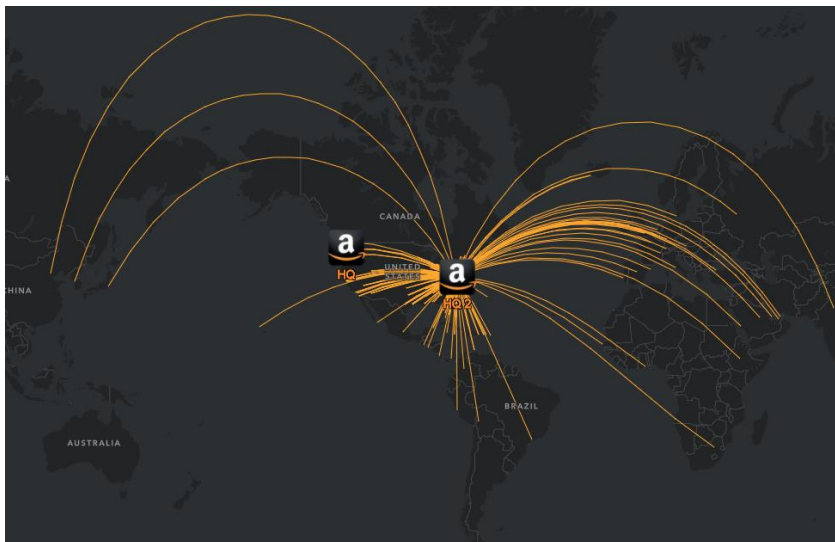
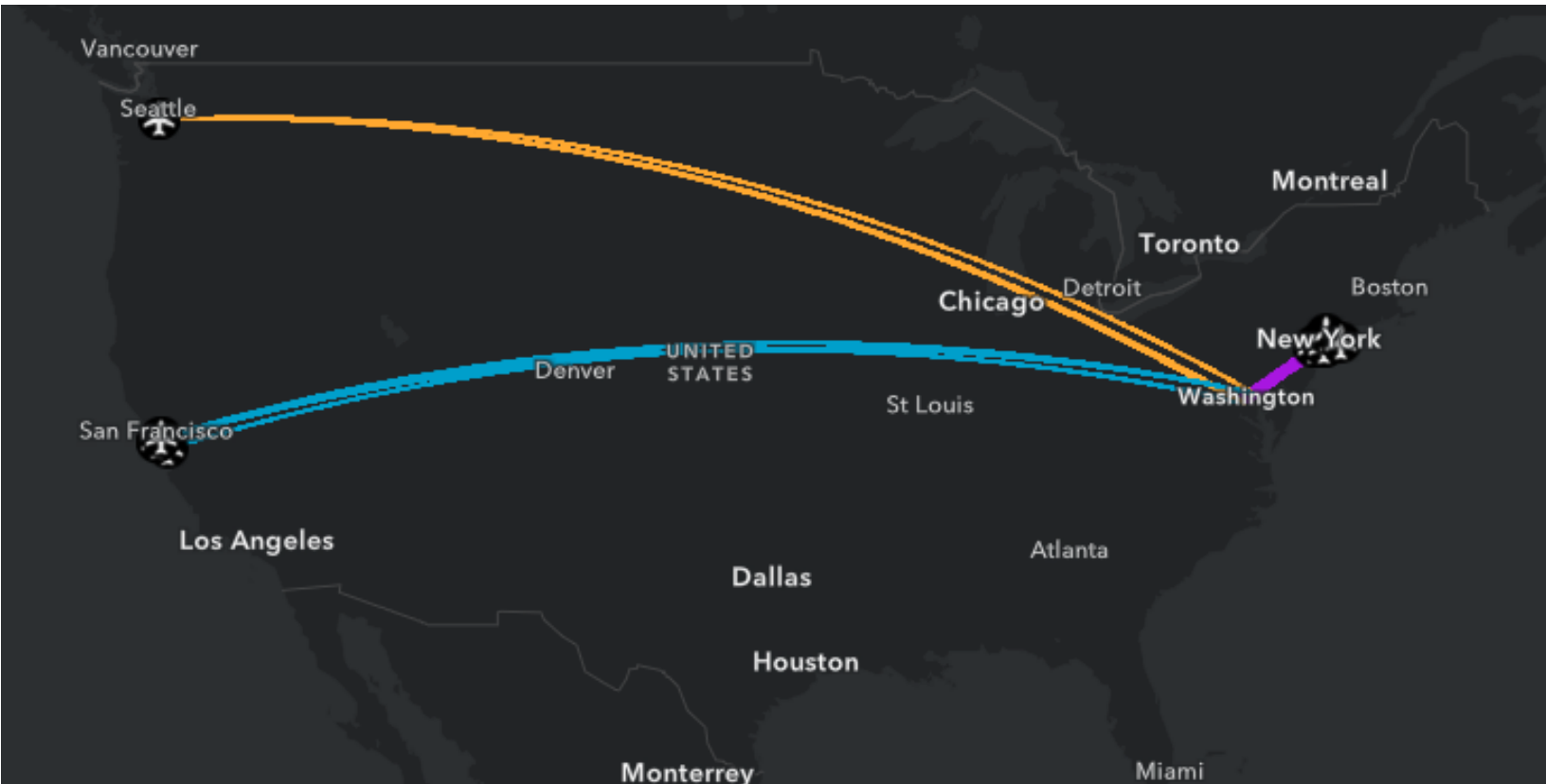
In many ways, Amazon is already here. No other MSA in the country – not even Seattle – is home to more Amazon.com customers than Greater Washington. Two million of them. More than 40% of the region’s adult residents have ordered from Amazon.com in the last 12 months. The region is home to over 20 Amazon data centers and distribution centers. Our educated, prosperous and high-tech community is reflexively open to disruptive business models. It is a perfect laboratory for Amazon to continue its transformative disruption to the retail sector.

The same impulses are true at the B2B and B2G levels. Over the last 12 months, the Greater Washington area has been the origin of more inquiries about AWS than any other location outside the West Coast. As more of our growing businesses – and the Federal Government itself – modernize their delivery systems and move to the cloud, more opportunity is created for Amazon.

Beyond just business, Amazon’s location in the Washington area will help pave the way for quicker approval and adoption of innovative solutions. Every day, news headlines suggest that government should embrace a more aggressive and critical check on the growing influence of technology companies. Many of the officials asked to judge these sophisticated business models have limited understanding of them. Proximity breeds understanding, and understanding yields acceptance and support. This is a primary reason that many of the country’s large aerospace companies, cybersecurity businesses and biotechnology businesses choose to place their headquarters in the region.

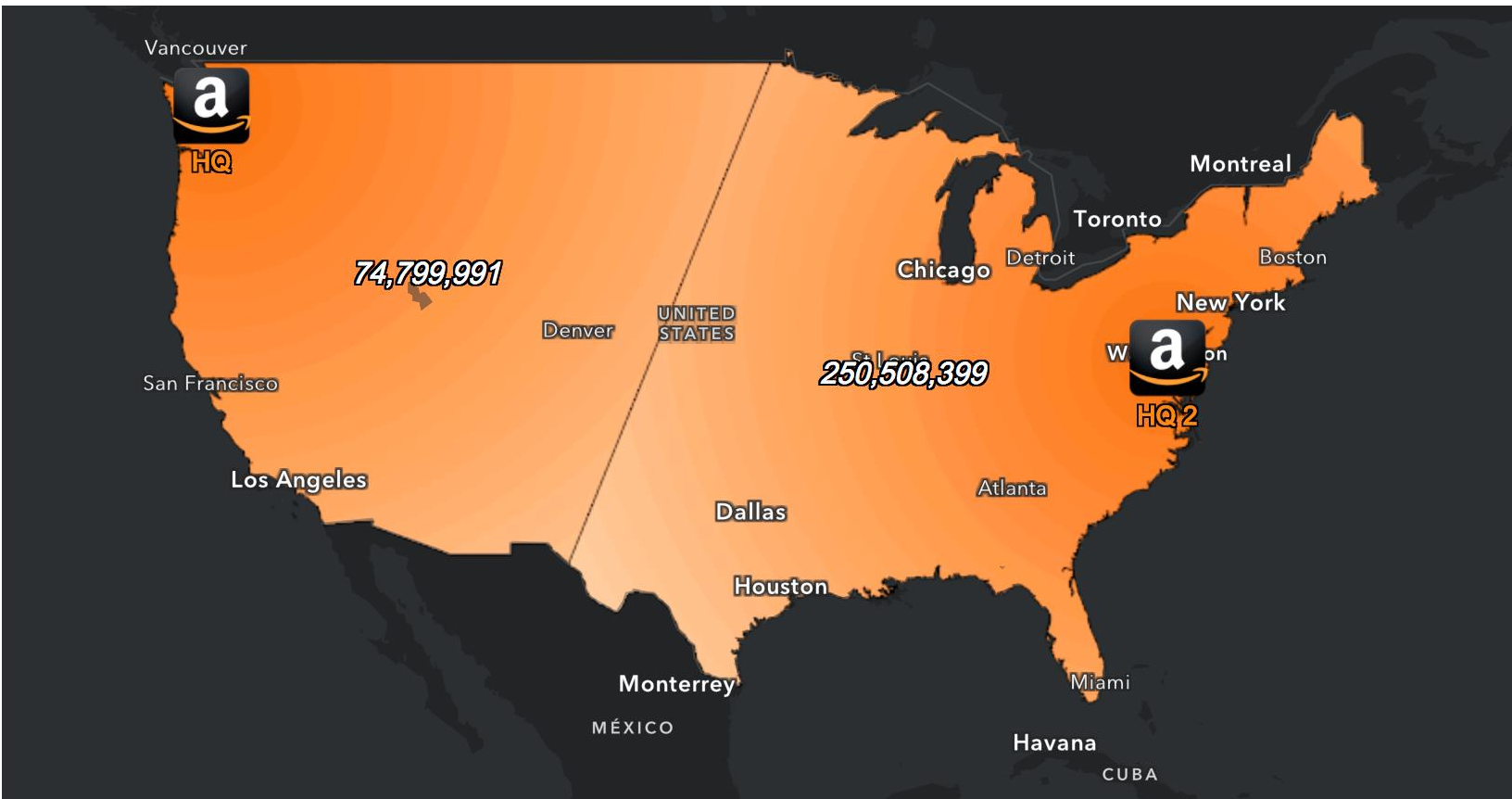


The Greater Washington area is advantageously situated from a geographic perspective as well. Its residents are within a five-hour drive to seven of the top 50 MSAs in the country, giving easy access to a huge percentage of America's population and economy. The broader region is served also by a rapidly evolving transportation and logistics infrastructure, including hourly shuttle flights to business hubs in New York and Boston, the business-focused Acela train that stops in most major East Coast hubs, a freight rail system optimized for intermodal solutions and a robust highway network. In many ways, the larger super-region acts as an integrated economic zone, sharing talent, markets and a common mindset.



The Greater Washington area is globally accessible via 3-international airports, offering multiple, direct flights to Seattle, New York, the San Francisco/Bay Area and the world

Greater Washington is also an important global hub for commerce, culture and government. Its three major airports are important hubs for United, American and Southwest airlines and serve nearly every airline on earth for delivering both passenger travel and freight delivery. The region provides easy access to five of the 20 largest U.S. ports and is particularly close to Baltimore and Hampton Roads. Every country has an embassy or consulate situated in the Washington area, making it easy for Amazon to efficiently launch face-to-face dialog as it pursues its mission of transforming the retail sector around the world. It is the home to the U.S. Postal Service, a logistics giant looking for innovative partnerships to increase its relevance in the decades to come.



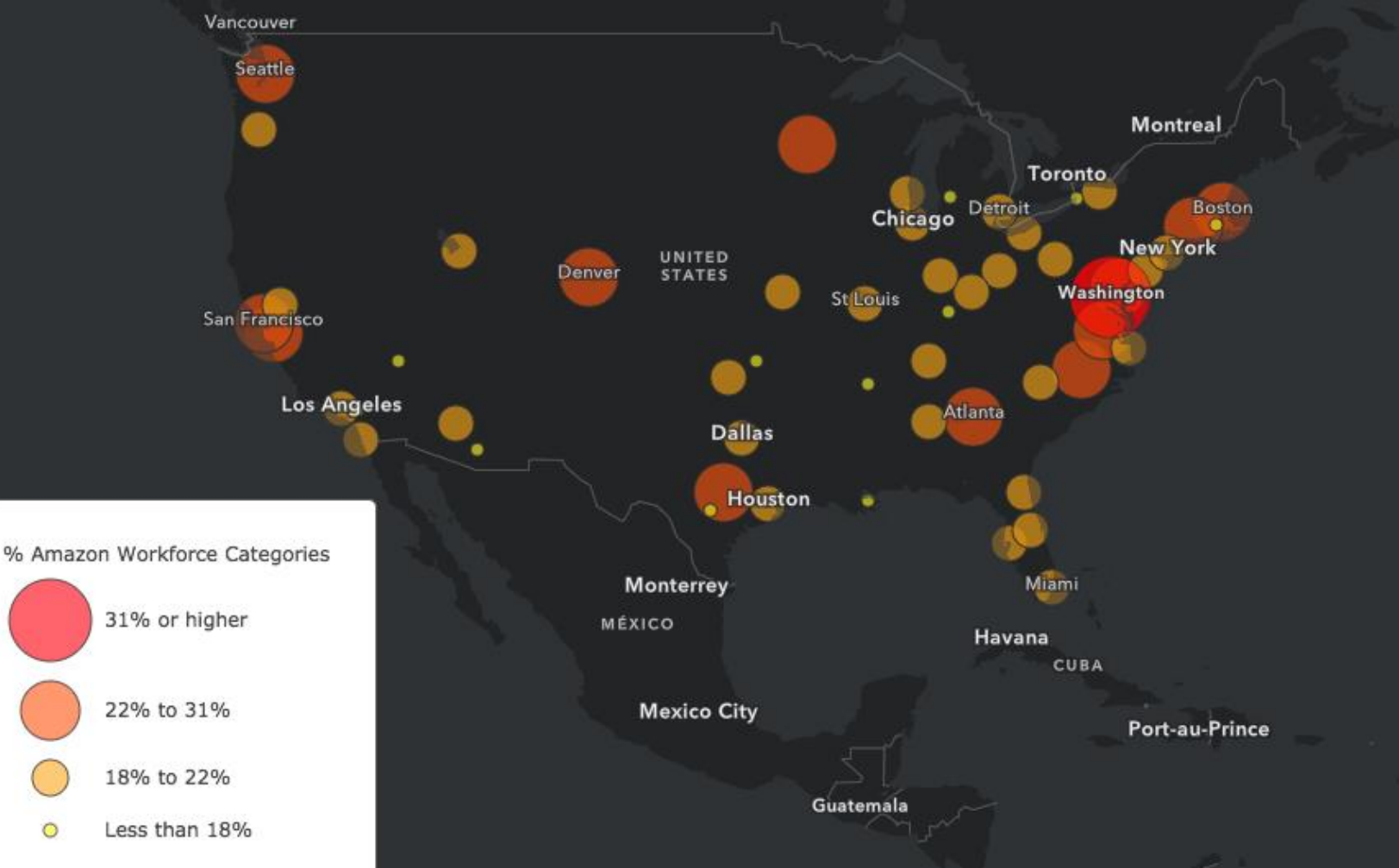
The region offers an East Coast redundancy that is equally accessible to 3x more population than the West Coast.

Overall, the Eastern half of the country hosts a consumer base three-times that of the population in the Western half of the country, and no location delivers better access to global markets. Having Amazon's second headquarters in Greater Washington will yield an important long-term redundancy and cause demand for its solutions to accelerate both locally and globally, as employee ambassadors are infused into our communities, local reporters and online influencers better understand and pay attention to the company's innovations, and executives and government leaders learn from each other.



VIBRANT

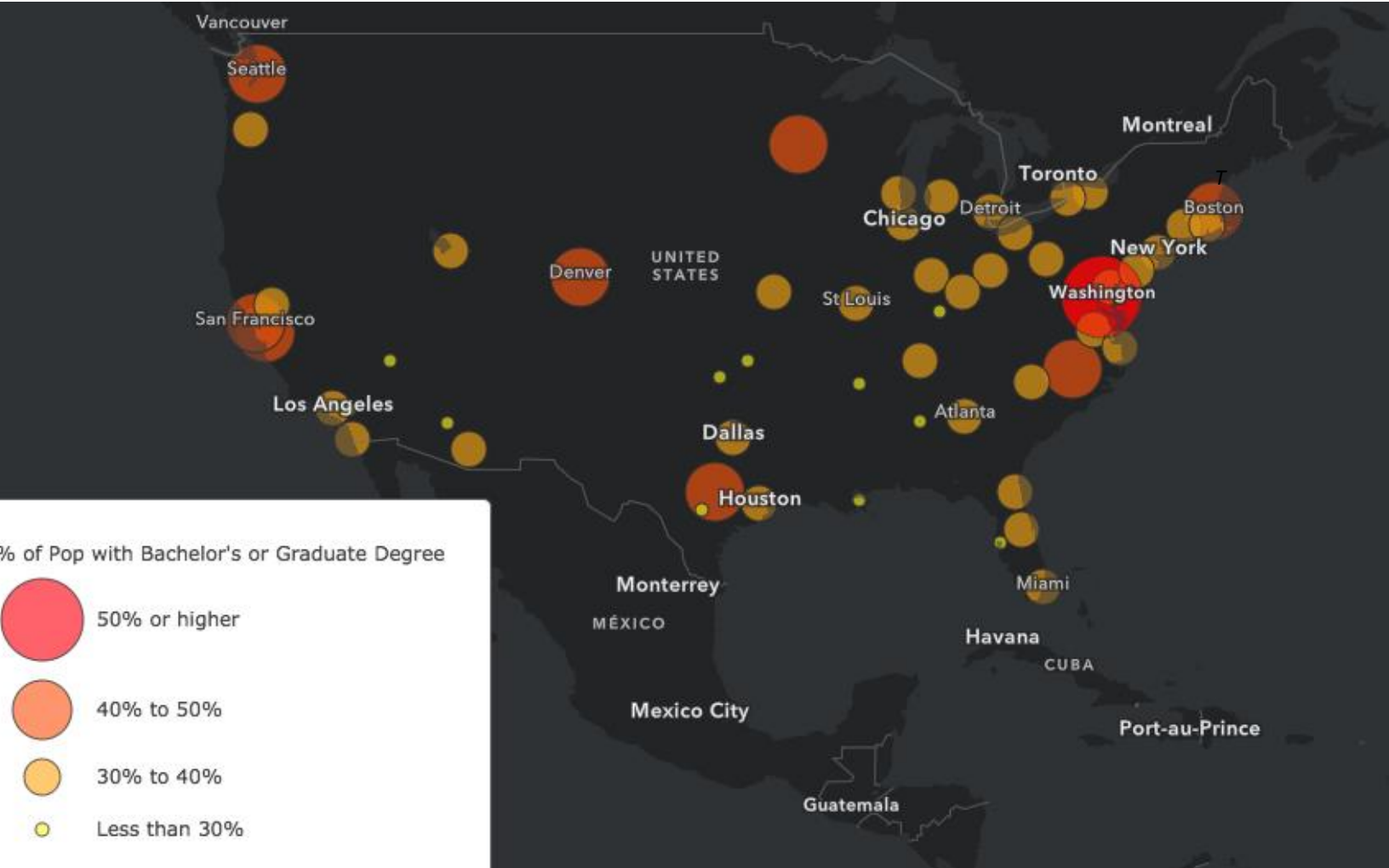
Jack Welch, General Electric’s iconic CEO, once said that “no company...can win over the long run without energized employees who believe in the mission and understand how to achieve it.” Amazon’s continued success can be best secured by finding a second headquarters location that gives it access to a labor force whose driving mission is to disrupt, innovate and change the world. Who have both talent and energy, who embody an entrepreneurial spirit and diverse thinking, and who can embrace Amazon’s tremendous sense of mission. There is no better talent pool than the one waiting for Amazon in Greater Washington.



The Greater Washington area is ranked #1 when considering Amazon’s target workforce. When considering individual job categories, the region is #1 in Management, #1 in Business/Financial and #1 in Legal. The region dominates the East Coast for highest percentage (7%) of employees working in the Computer / Mathematical field.

The labor pool in Greater Washington has unrivaled alignment with the kinds of skills and experience Amazon requires to power its business. Across the region’s wide range of diverse technology businesses, it has the second highest percentage of employees – 7 percent – working in the computer and math field of any MSA in America. Many of these highly skilled workers are experts in key specialties relevant to Amazon’s business, like cyber security, data sciences, user experience and online payments. The many with experience in supporting the federal sector and the military understand what it takes to deliver online solutions with zero tolerance for failure that can scale incredibly well.

In addition, Greater Washington is the top-ranked location for professionals in key corporate business functions such as management, financial and legal. There is tremendous depth of experience here in project management, including for the delivery of complex technical systems. This professional community supports itself with robust regional networking opportunities through which members of the region’s workforce learn from each other, pursue training and development, and uncover intra-regional business opportunities. There is also highly frictionless labor mobility, with many top-flight recruiters and placement services who specialize in helping fill key vacancies in the Washington region.

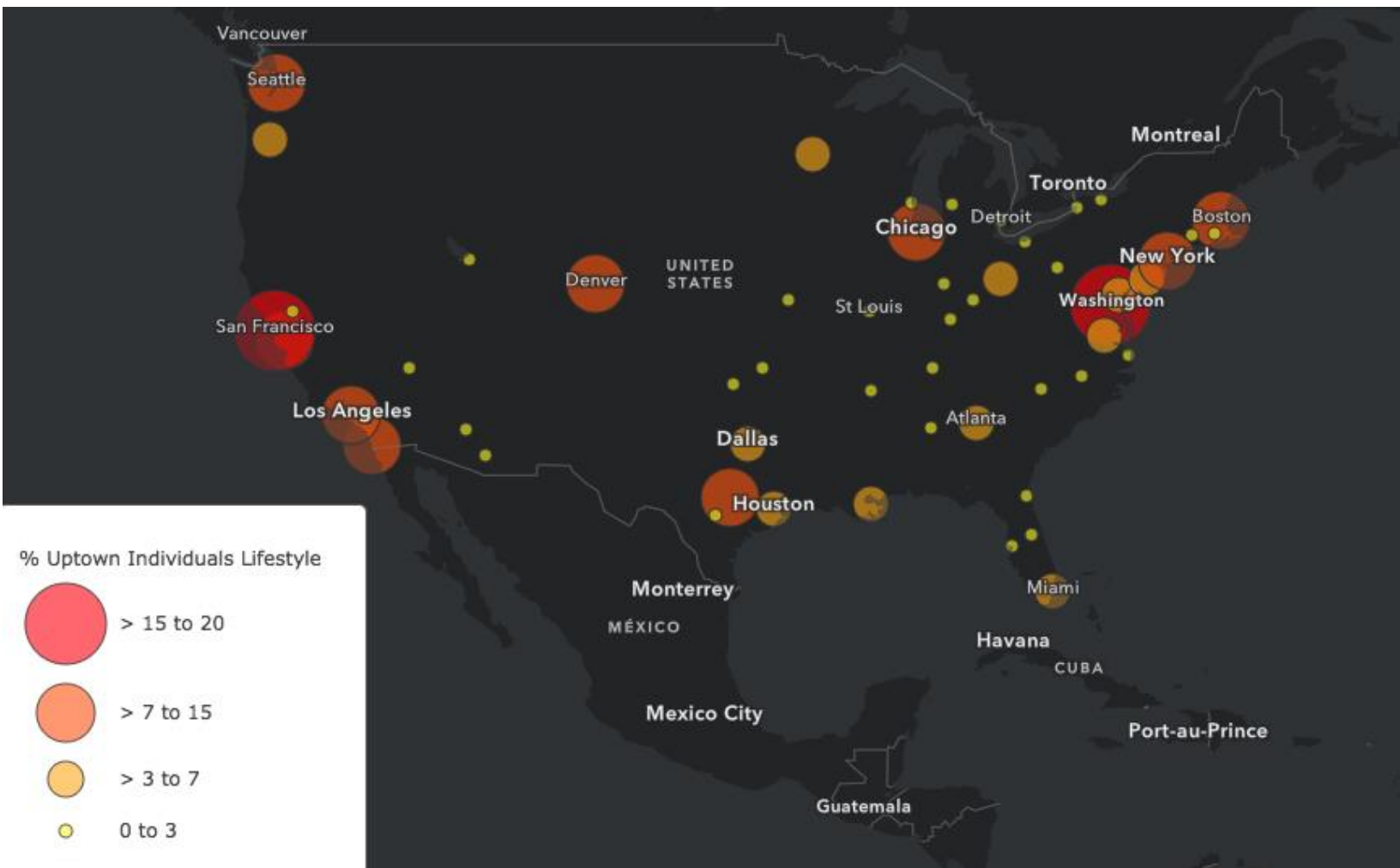


The Greater Washington area is ranked #1 for educational attainment, with more than 50% of the population holding a Bachelor's (2.1 million) or graduate/professional degree (1 million).

The Greater Washington labor force is also the country's most educated. More than half of working adults hold either a Bachelor's, Graduate or Professional degree, many from the region's incredible network of diverse colleges and universities. There are over 40 different universities and colleges in the region, including seventeen member colleges and universities of the Consortium of Universities. The region has embraced non-traditional higher education models as well, hosting robust networks of community colleges, pioneering online learning, and offering professional certification opportunities sponsored by many of the leading national and international universities.

Fueling this network of top universities is a strong primary and secondary education system with some of the country's top school districts. The region is ripe with secondary education campuses that specialize in science and mathematics, preparing the next generation of professionals in the STEM fields and beyond. The public-private partnerships and access to local institutions such as innovation centers, Smithsonian and NASA render the Greater Washington Area an unrivaled place to inspire and motivate young students of all backgrounds.

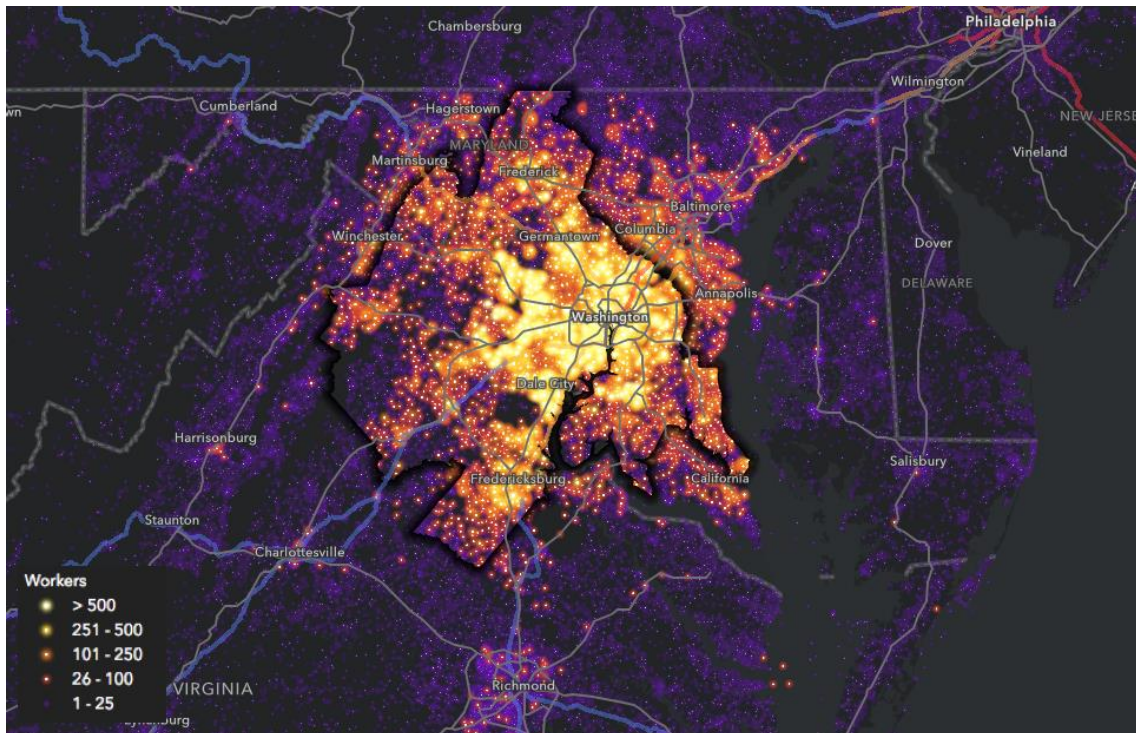
But skills and education are only a small part of the story when it comes to the region’s dynamic workforce. The region is a leader in diversity, pulling talent from around the world and across the country to fill key roles and bring a level of sophistication and dynamism to the local culture. Over the next two decades, the region’s population is projected to grow another 25 percent with nearly all the non-organic growth coming from international migration. By 2030, nearly 30% of Greater Washington’s population will be comprised of foreign born workers and their families. This region is changing rapidly due to the influx of this diverse thinking and experience, and those trends will continue to escalate as the workforce, and the community that surrounds and influences it, diversifies further.



The region has attracted the young, highly-educated, professionals that Amazon wants in its workforce. We call this profile “Uptown Individuals” and the Greater Washington area has a higher percentage of these individuals than any MSA east of the West Coast.

One result of Greater Washington’s highly educated, diverse and entrepreneurial population is that the community has a higher proportion of people who are mission driven, ambitious, adaptable, motivated and looking to make a difference than any other location in the nation.

Esri's tapestry segmentation model classifies U.S. communities into 67 distinct segments based on their sociographic and demographic composition, then further classifies them into LifeMode and Urbanization groups. An analysis of Greater Washington reveals it has the highest proportion of Uptown Individuals – younger, urban singles on the move – despite this segment representing only 3.7% of the total U.S. population. Uptown Individuals are much more likely to be active on social media, rely on public transportation, walking or biking, be fit, healthy and active, and to be motivated by a sense of mission or purpose. To us, this sounds an awful lot like Amazon's existing workforce.



The statistics that put the Greater Washington area in #1 spot for workforce, include only those residents who live inside of the official MSA boundary (shown as black outline). As evidenced by this data from the US Census Bureau, the DMV's labor shed draws from a much wider regional area

Greater Washington's physical location and the robust transportation infrastructure that supports it would deliver a secondary benefit to Amazon as it pursues building a workforce in the region. Even today, our region's labor shed draws from an area much larger than the top ranked pool within the MSA itself. It is not unusual to encounter co-workers commuting to Washington on commuter trains from Baltimore, Manassas, and Fredericksburg, via Amtrak trains from regional cities like Wilmington or Richmond, or on the shuttle down from Boston or New York. As the robustness of that infrastructure grows, the regional population will become even more of a pool from which to draw new talent and new ideas.

* * * * *

Today, people move to the Greater Washington area for many reasons, not just government. The region is home to more entrepreneurial companies than anywhere else in the nation and offers a dynamic and diverse local culture filled with opportunities to network, grow professionally and achieve great success and fulfillment. Most importantly, the Greater Washington area is the perfect place for people to find a way to use technology to change the world for the better.

The Greater Washington area is a symbolic beacon of what America represents to the world and is home to two strong states, one powerhouse city and many local governments. It's where many of the world's leading corporations are headquartered. It's where tomorrow is accelerated.

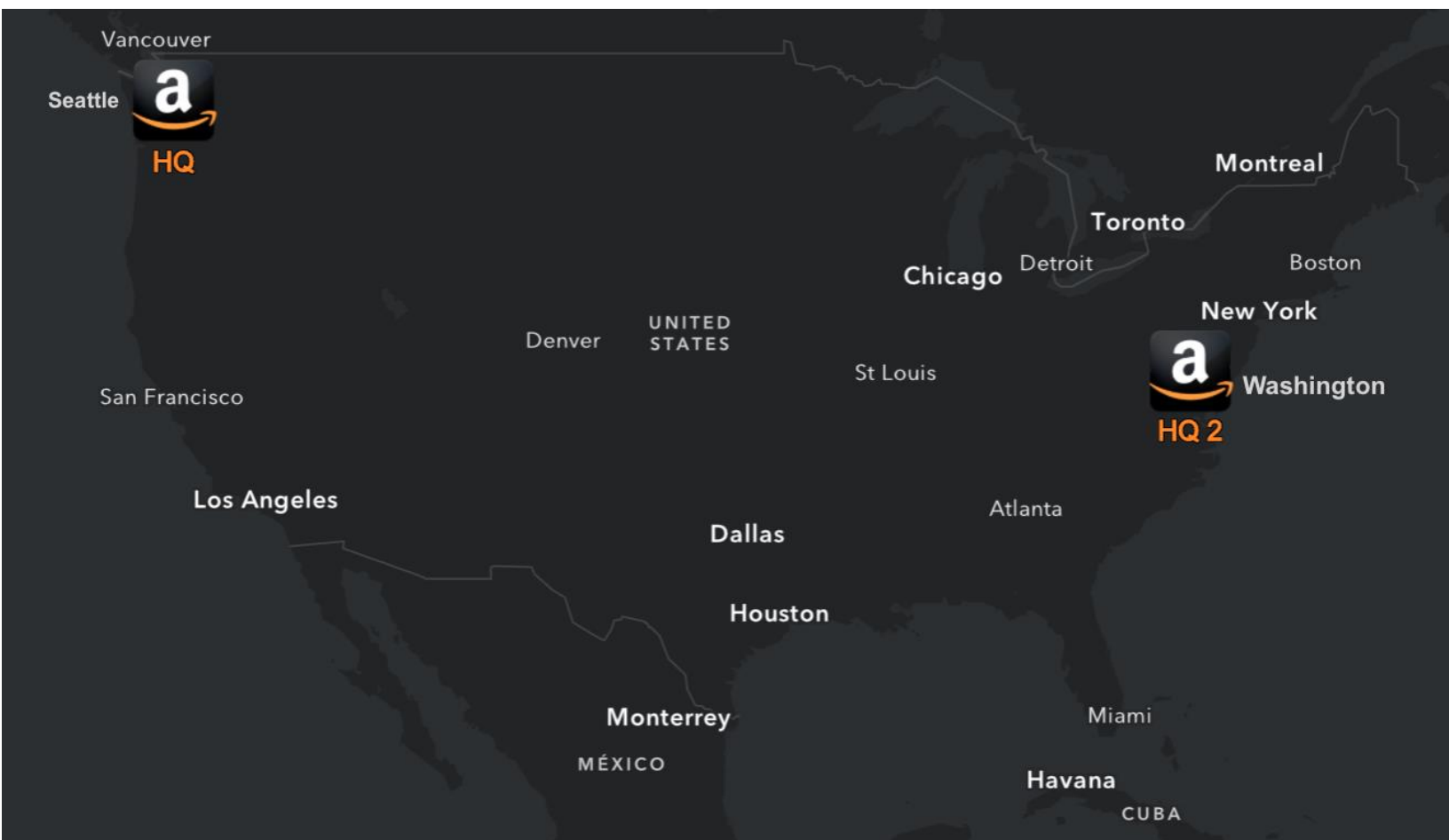
The region truly represents America at its best, at its brightest and at its most optimal. It is global and national. It is a region, yet feels local. It's where communities connect and citizens and families congregate. And it is all within a walk, drive, bike, or train ride away.

The DMV is truly a super-region, one that energetically and continuously transforms. It is vital today and critical to tomorrow.

It's consistent growth, stable economy, world-class transportation and unique level of security makes the region dependable. As a hotbed for innovation, entrepreneurship, technology, research and development and more are matchless. The vibrancy of its people, education system, neighborhoods, culture and propensity for disruption creates the right atmosphere for Amazon to thrive.

Like Amazon, this region inspires, surprises, seizes new opportunities and makes them real.

AmazonDMV, untapped possibilities.



This is a companion report to the AmazonDMV Story Map created for the Metropolitan Washington Council of Governments to enhance its member governments bids for Amazon's second headquarters by helping them promote the region's many assets. The Story Map and report were created by Datastory Consulting and APCO Worldwide. Source info for the tables can be found on the Story Map at www.amazondmv.com



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