



SAVILLS | DATAFEST 2025

A COMPARATIVE ANALYSIS OF VALUE AND PRICING DYNAMICS

The Machine Team

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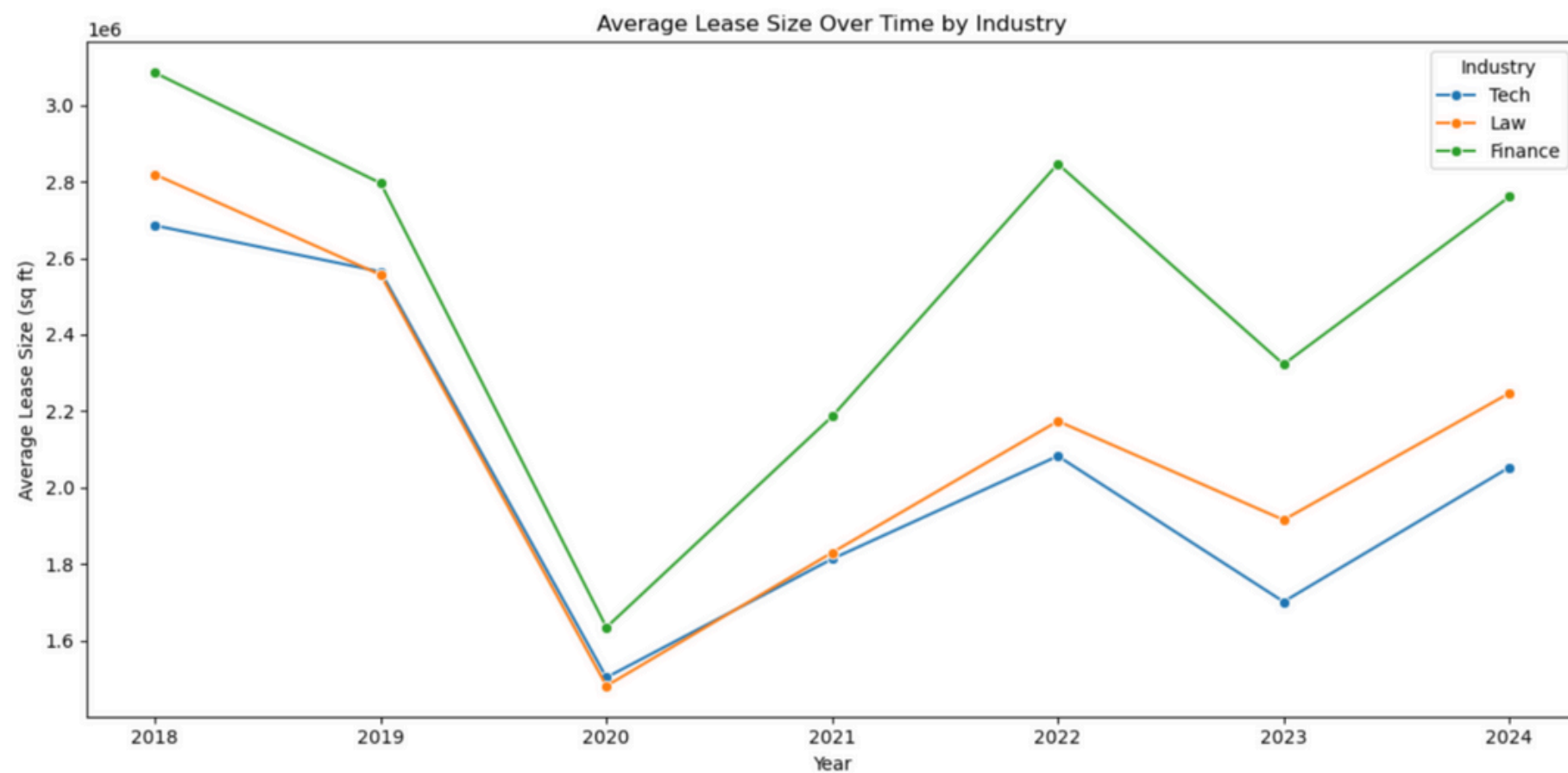
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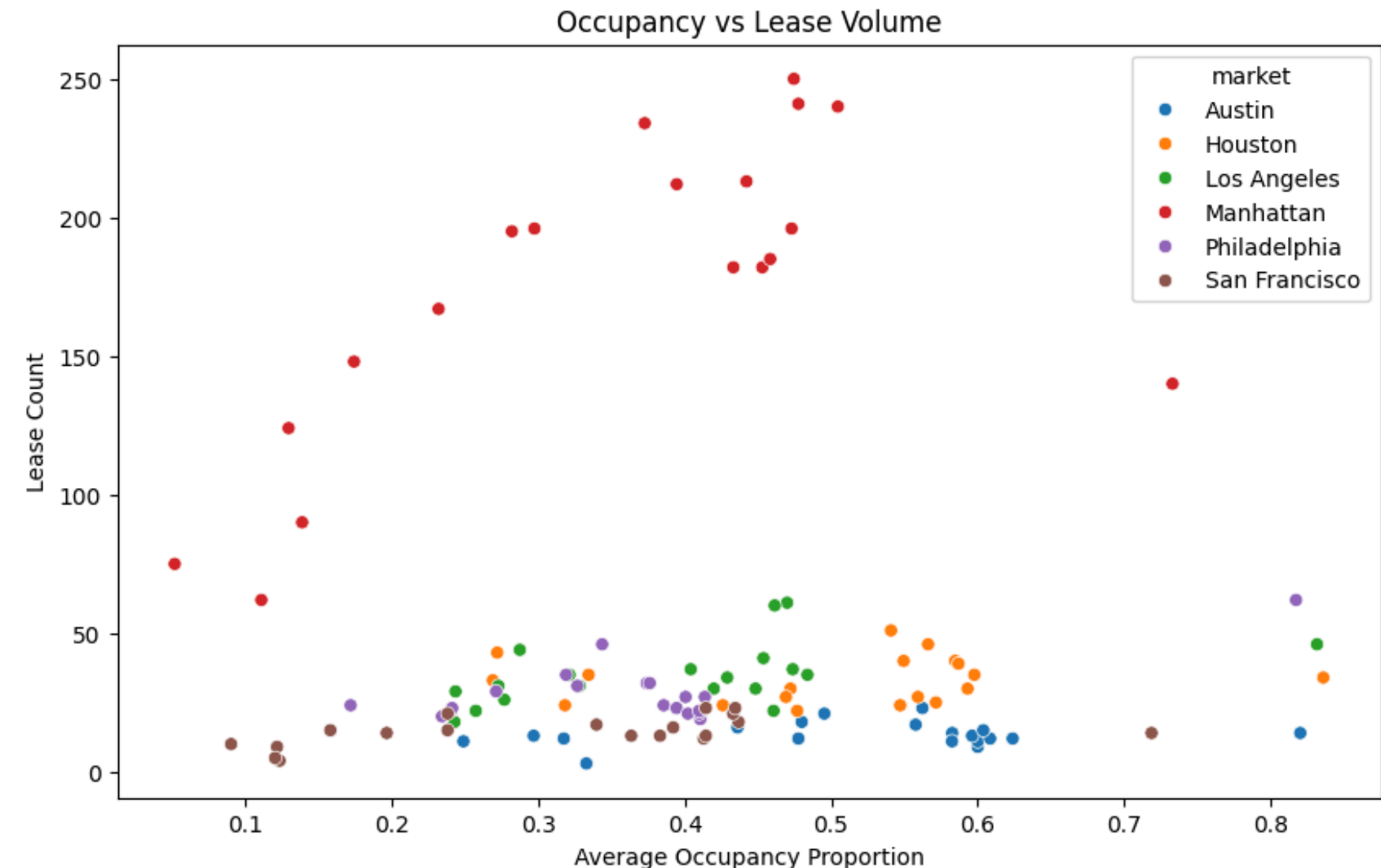
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HOW ARE TENANT'S NEEDS CHANGING OVER TIME?



- **Legal and Tech:** Shifting *away from long-term*, oversized leases
- **Finance:** Leaning into *recovery* — favoring central locations, prestige buildings, and longer commitments in markets like Manhattan, Chicago, and Charlotte

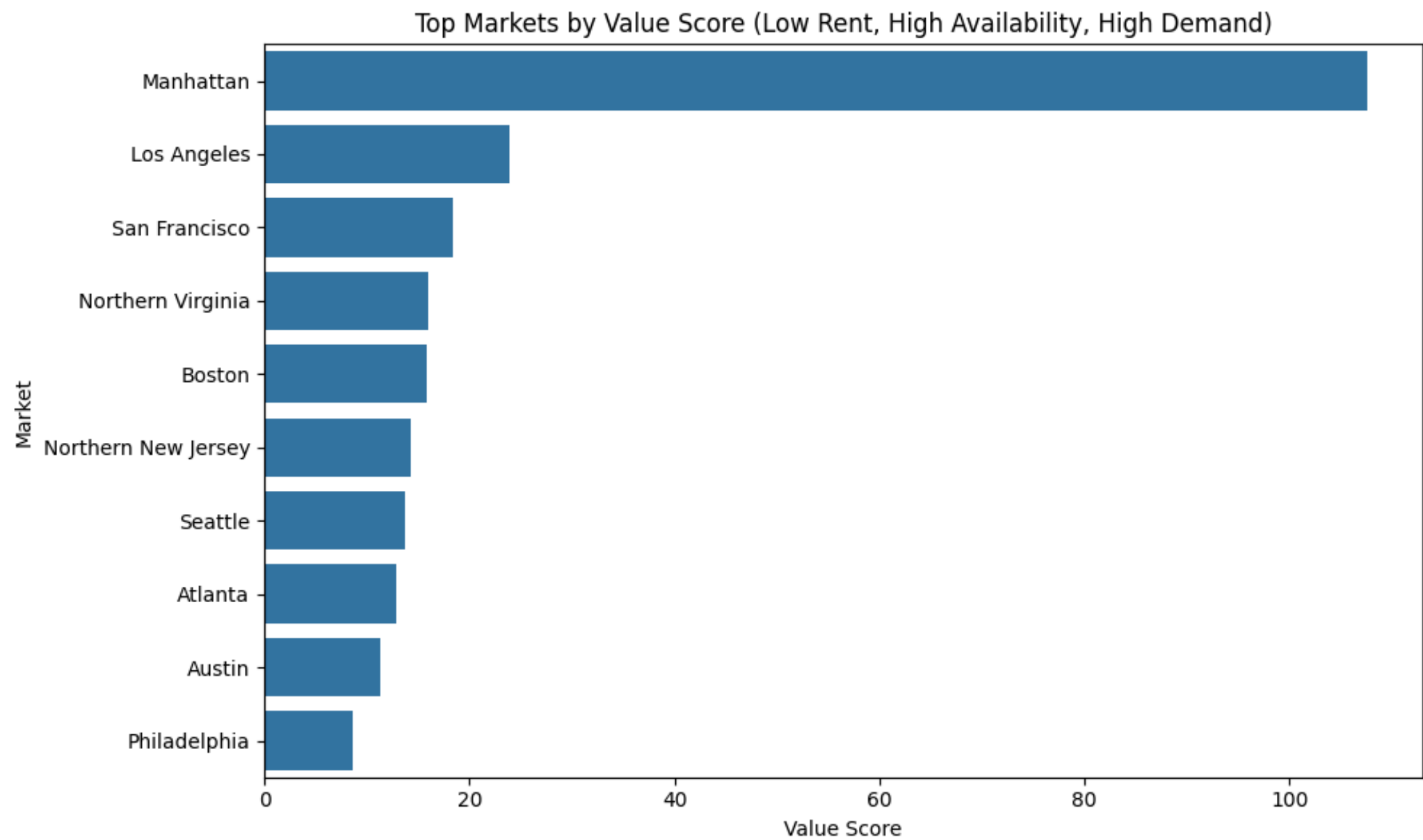
ARE BUSY MARKETS STILL SEEING LEASING ACTIVITY?



- **High occupancy \neq high opportunity**
- Watch for repositioning opportunities: lower occupancy, lower lease volume \Rightarrow landlord flexibility \Rightarrow good for tenants looking to negotiate favorable terms

WHERE SHOULD CLIENTS FOCUS NEXT?

FINAL RECS?



- **Don't judge markets by rent alone.**
- Target emerging rebound zones (e.g., Manhattan) and strategic value buys (e.g., Philadelphia) based on **client's risk tolerance** and **timeline**.

Client Need	Recommended Market Strategy
Prestige & Demand	Choose Manhattan, LA : high rent, but unmatched leasing activity
Flexible, Hybrid Teams	Consider SF, Seattle, Austin : tech-friendly, sublease-rich environments
Long-Term Presence w/ Stability	Go with Chicago, Northern Virginia : steady demand, less volatility
Cost-Sensitive Expansion	Look to Philadelphia, Atlanta : lower cost, decent space, room to grow
Tenant-Friendly Negotiation	Target markets with low activity but ample space (e.g., Houston, South Bay)