

# Retail Vision

## Transbay Transit Center

TJPA Board Presentation

May 11, 2017



Presented by:  
Erika Elliott  
Ann Natunewicz  
Julie Taylor

# ACTIVITY THROUGH PROGRAMMING

Retail Vision



Pearl creates a media voice.  
Biederman creates experiences.  
Colliers recruits retailers to generate traffic.  
Lincoln pulls it all together.





# RETAIL VISION

Colliers Team Experience



**Erika Elliott**  
Downtown Retail

The Market



Fitness SF



The Treasury



**Ann Natunewicz**  
Union Square & Neighborhoods

Mastro's



JINS



La Fromagerie

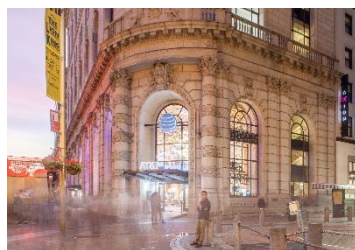


**Julie Taylor**  
Union Square & Bay Area

Apple – 300 Stockton



AT&T – 1 Powell



Bay Street Emeryville



## RETAIL VISION

### Mission Statement

Our vision is to **deliver an experience throughout the day and evening** that inspires and delights those who have come to explore and linger, while quickly and efficiently **meeting the needs of those passing through.**



**Local Employee**



**Bus/Rail Commuter**



**Local Resident**



**International Visitor**



# RETAIL VISION

Customer Draw



## Demographics

- ±108,000 employees
- Industries include
  - Technology
  - Finance
  - Law Offices
  - Business Services
- 1.5 person/unit= ±13,000 residents
- ±8,500 units of housing by 2018



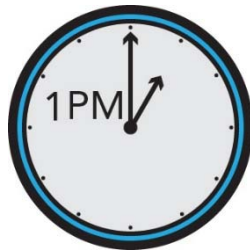


# RETAIL VISION

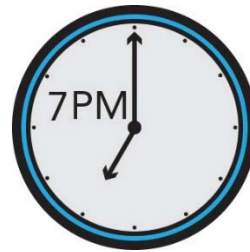
Programming the Transit Center – 24/7



Jogging in the park  
Coffee  
Newsstand  
Bakery



Bike repair  
Lunch in the park  
Grab-and-go



Bar  
Sit-down dinner  
Concert

## Weekends



Grocery  
Wedding  
Concert  
Salon



# RETAIL VISION

Tenant Categories

**DRY GOODS**

WILLIAMS SONOMA

SAN FRANCISCO GIANTS DUGOUT

BODY TIME EST. 1970 BERKELEY, CA

SEPHORA

ATHLETA

CHROME

**FOOD & ENTERTAINMENT**

WORK TO WALK

THE COUNTER

THE ORGANIC COUP

SUPER DUPER

WISE SONS

ANTI CA

Spitz Coffee

MoM's

PROPER FOOD

sweetgreen

oSha

Kara's Cupcakes

Smitten ICE CREAM

PACIFIC COOKIE COMPANY

ANCHOR & HOPE

BLUE BOTTLE COFFEE

THE TRAP

central kitchen

flour + water

DOSA

Salt House

MIXT

TRICK DOG

Specialty's

JOE & THE JUICE

PIEDLOGY

THE PLANT CAFE ORGANIC

Mission Chinese Food

STEEL SPAIL

HAVEN

Blanc et Rouge wine bar

BLUE BARN

Kingston

**NON TRADITIONAL**

WORKSHOP CAFE

THE MARKET HALL

the MARKET

SPiN

**SERVICES**

FELLOW BARBER

Huckleberry specialties

VANITY BEAUTY LOUNGE

one MEDICAL GROUP

Pinkies NAIL SALONS

SPARGO

Shoe Biz A Different Kind of Shoe Store

ANADEUS FLOWERS

**FITNESS**

Pilates ProWorks

Orangetheory FITNESS

FITNESS SF

corepower YOGA





## RETAIL VISION

Emphasis on the Local Brands

- Each tenant is a building block that links the Transit Center to the community.
- Our team will vet all prospective tenants for their willingness to participate in creative outreach programs throughout the Transit Center.





## RETAIL VISION

### Merchandising Logic

- Ground Floor | High Traffic
  - Short stay
  - Impulse
  - Gifts/flowers
- Ground Floor | Natoma Walkway
  - Table service restaurants
  - Cocktail Lounge/Brewpub
- Bus Level | Commuters
  - Kiosk
  - Popups



# RETAIL VISION

## Merchandising Logic (cont'd)

- Second Floor - Destination
  - Office
  - Fitness
  - Beauty
  - Events
  - Food hall/cooking school
  - Traditional grocer
  
- Rooftop – Extended Stay
  - Fine dining
  - Event catering
  - Café/picnic basket
  - Cart food
  - Toys
  - Mobile library
  - Fitness
  - Play area activation





# RETAIL VISION

Activating the Transit Center

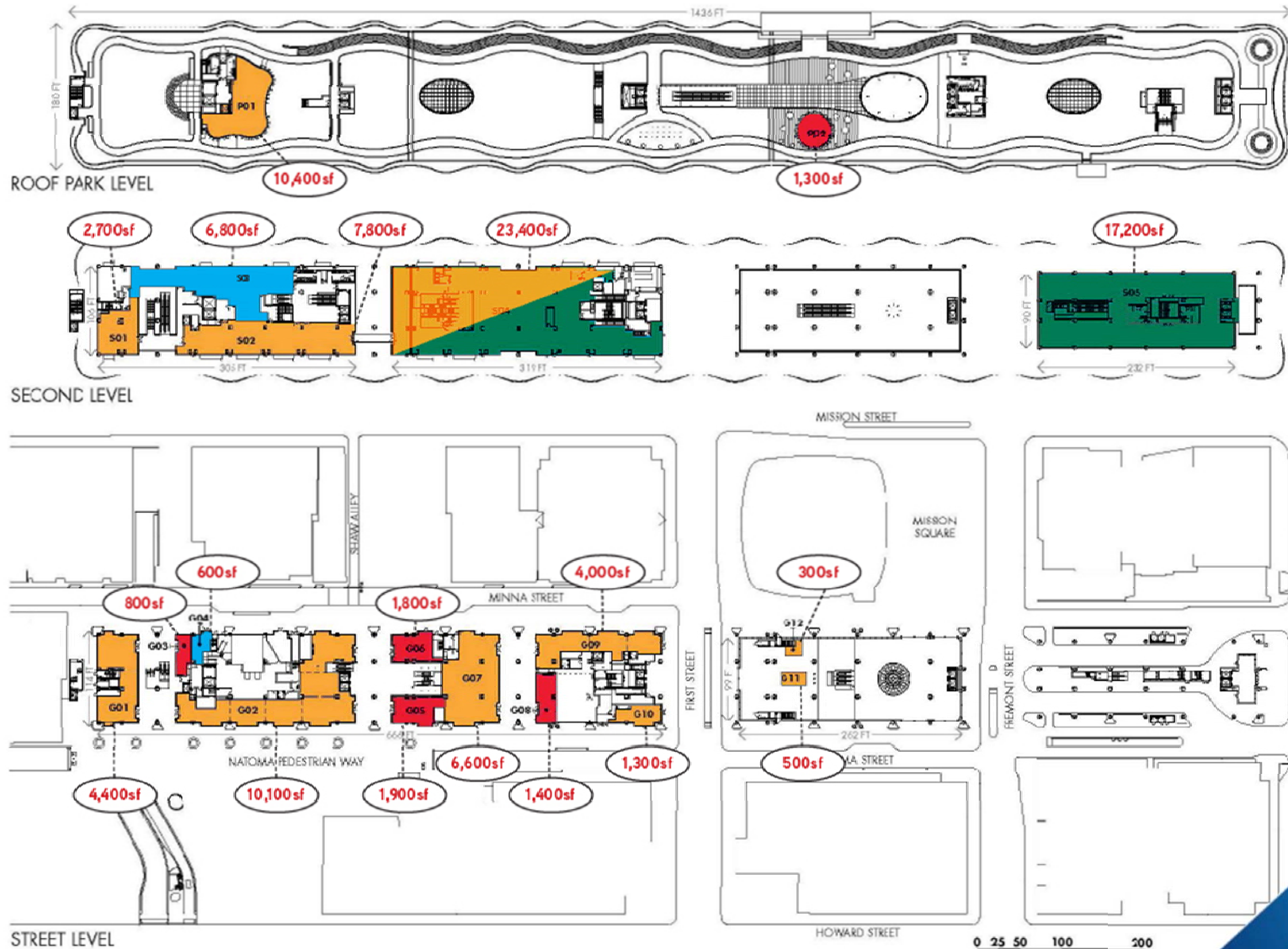


|  |                            |                    |                                                        |                               |               |
|--|----------------------------|--------------------|--------------------------------------------------------|-------------------------------|---------------|
|  | Gourmet deli               | Fitness operator   | Restaurants & Bars                                     | Restaurants                   | Newsstands    |
|  | Park picnic basket program | Yoga in the Park   | Multiple on-site events with retailers and restaurants | Hand-cart program in the Park | Reading Carts |
|  | Broadcast by Pearl         | Broadcast by Pearl | Broadcast by Pearl                                     |                               |               |



# RETAIL VISION

## Transbay Commercial Space Plan



| Category |  |
|----------|--|
| Type I   |  |
| Type II  |  |
| Retail   |  |
| Phase II |  |

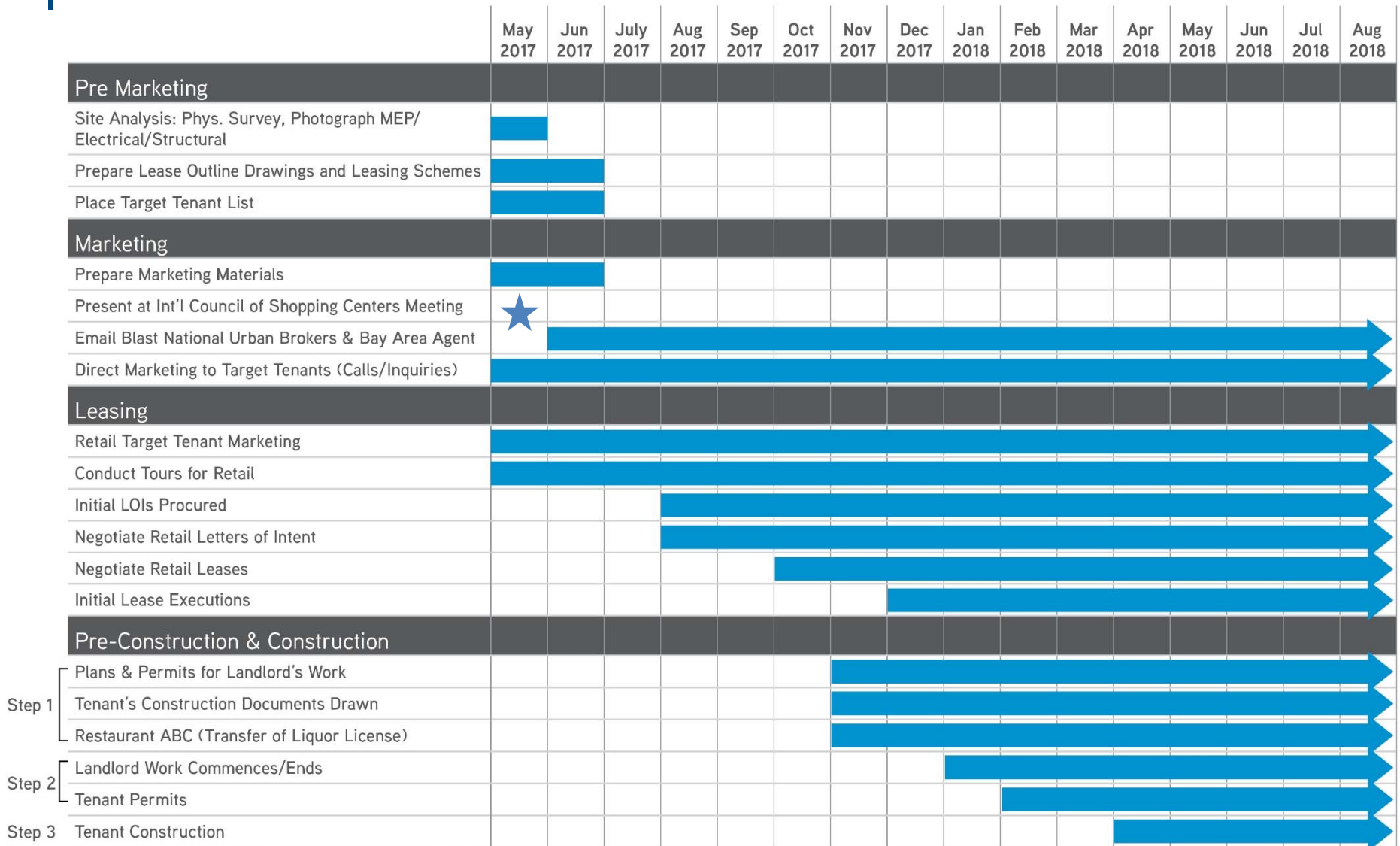
0 25 50 100 200  
SCALE IN FEET





# RETAIL VISION

## Proposed Leasing Schedule



\*Arrow denote ongoing activity beyond displayed timeframe

# RETAIL VISION

## Proposed Leasing Schedule

Upon Opening (March 2018) - Temporary Activation Throughout the Transit Center



Farmer's Market



Food Trucks



Outdoor Fitness



Hand Carts



Outdoor Market



Mobile Service Kiosks



Vending Machines



## RETAIL VISION

### Next Steps

## MERCHANDISING PLAN

1. Submit merchandising plan for approval at the Board meeting by June 8th
2. Refining retail plans (Lease Outline Drawings, aka LODs)

### ***Once tenant mix is approved:***

## MARKETING EVENTS

- Networking with other brokers at International Council of Shopping Centers (May 22<sup>nd</sup> to 23<sup>rd</sup>)
- San Francisco fairs and festivals (Summer-Fall 2017)
- Social media (build a retail leasing-focused website for prospective tenants to access)

## TENANT ENGAGEMENT

- Video
- Requirements package
- Request a tour
- Negotiations



## CONTACT INFORMATION

Please submit all ideas for tenants to one of us

**Erika Elliott**

erika.elliott@colliers.com

+1 415 293 6295

lic 01234477

**Ann Natunewicz**

ann.natunewicz@colliers.com

+1 415 288 7880

lic 01935970

**Julie Taylor**

julie.taylor@colliers.com

+1 415 293 6293

lic 00998395



# COLLIERS INTERNATIONAL

## Retail Team Bios



### Erika Elliott

Erika Elliott is well-known and respected in the Bay Area for her ability to identify emerging restaurateurs and talented chefs, working with them to develop creative concepts and launch financially successful operations. During her 20-year career, Ms. Elliott has leased more than one million square feet of retail space in San Francisco, for an estimated transaction value of \$52 million. Some of her notable assignments include Market Square and the formation of Market on Market, Jack London Square in Oakland, and Nasdaq's West Coast headquarters. In 2014 she was named a CoStar power broker for her project work in San Francisco.



### Ann Natunewicz

Ann Natunewicz combines a broad-based retail real estate and financial markets advisory background with nearly 20 years of national transactions experience. Working at Colliers since 2011, she has leased more than 65,000 square feet of retail space and has served as an asset management consultant to multiple institutional ownership groups. Prior to Colliers, she spent 12 years in-house with three of the country's largest equity REITs, focused on ground-up development, tenant mix programming, and acquisitions strategy. She was recently recognized as one of Bisnow's 2017 Bay Area Power Women for her industry leadership and efforts to advance other women in their careers.



### Julie Taylor

Julie Taylor works exclusively to serve the needs of retail real estate property owners, investors, and tenants. She is highly active in downtown San Francisco, including the prestigious Union Square trade area, where she has leased more than 340,000 square feet in 50+ transactions. Ms. Taylor is known for her creative leasing strategies and her ability to communicate effectively with retailers. She has been recognized four times as a CoStar Power Broker (2010-2013) and twice by the *San Francisco Business Times*: once for 2013's Retail deal of the Year, Apple at 300 Post Street, and last year as one of the city's 50 Most Influential Women in Real Estate.

