

# Retail Vision Transbay Transit Center

CAC Presentation  
May 9, 2017



Presented by:  
Erika Elliott  
Ann Natunewicz  
Julie Taylor

# RETAIL VISION

Activity through Programming



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

# RETAIL VISION

Colliers Team Experience



The Market



Fitness SF



The Treasury



Erika Elliott

Downtown Retail

Mastro's



JINS



La Fromagerie



Ann Natunewicz

Union Square & Neighborhoods

Apple – 300 Stockton



AT&T – 1 Powell



Bay Street Emeryville



Julie Taylor

Union Square & Bay Area

# RETAIL VISION

## Mission Statement



To **deliver an experience throughout the day and evening** that delights those who have come to explore and linger, while **meeting the needs of those passing through**



Local Employee



Bus/Rail Commuter



Local Resident



International Visitor

# RETAIL VISION

Customer Draw



## Demographics

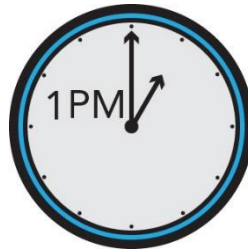
- ±108,000 employees
- Industries include
  - Technology
  - Finance
  - Law Offices
  - Business Services
- 1.5 person/unit= ±13,000 residents
- ±8,500 units of housing by 2018

# RETAIL VISION

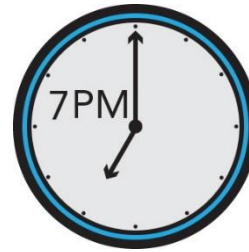
Programming the Transit Center – 24/7



Jogging in the park  
Coffee  
Newsstand  
Bakery



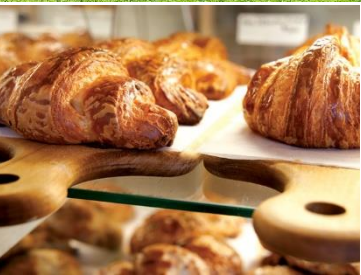
Lunch in the park  
Bike repair  
Grab-and-go



Sit-down dinner  
Bar  
Concert



Wedding  
Concert  
Grocery  
Salon



# RETAIL VISION

Tenant Categories

**DRY GOODS**

WILLIAMS SONOMA

SAN FRANCISCO GIANTS DUGOUT

BODY TIME EST. 1970 BERKELEY, CA

**SEPHORA**

ATHLETA

CHROME

**FOOD & ENTERTAINMENT**

BARBRA

WORK TO WALK

THE COUNTER

SUPER DUPER

WISE SONS

ANTI-GA

Spitz Coffee

MoMo's

PROPER FOOD

sweetgreen

OSHA

ANCHOR & HOPE

BLUE BOTTLE COFFEE

Karais Cupcakes

Smitten ICE CREAM

PACIFIC COOKIE COMPANY

BARCLAY'S

THE TREASURY

Salt House

central kitchen

flour + water

DOSA

Specialty's

JOE & THE JUICE

PIELOGY

MIXT

TRICK DOG

Mission Chinese Food

THE PLANT CAFE ORGANIC

HAVEN

Blanc et Rouge wine bar

BLUE BARN

STEEL SPAIL

Kington

**NON TRADITIONAL**

WORKSHOP CAFE

THE MARKET HALL

the MARKET

**SPiN**

**SERVICES**

FELLOW BARBER

ANADEN FLOWERS

VANITY BEAUTY LOUNGE

one MEDICAL GROUP

Pinkies NAIL SALONS

SPARGO

Shoe Biz A Different Kind of Shoe Store

**FITNESS**

Pilates ProWorks

FITNESS SF

corepower YOGA

Orangetheory FITNESS

## 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



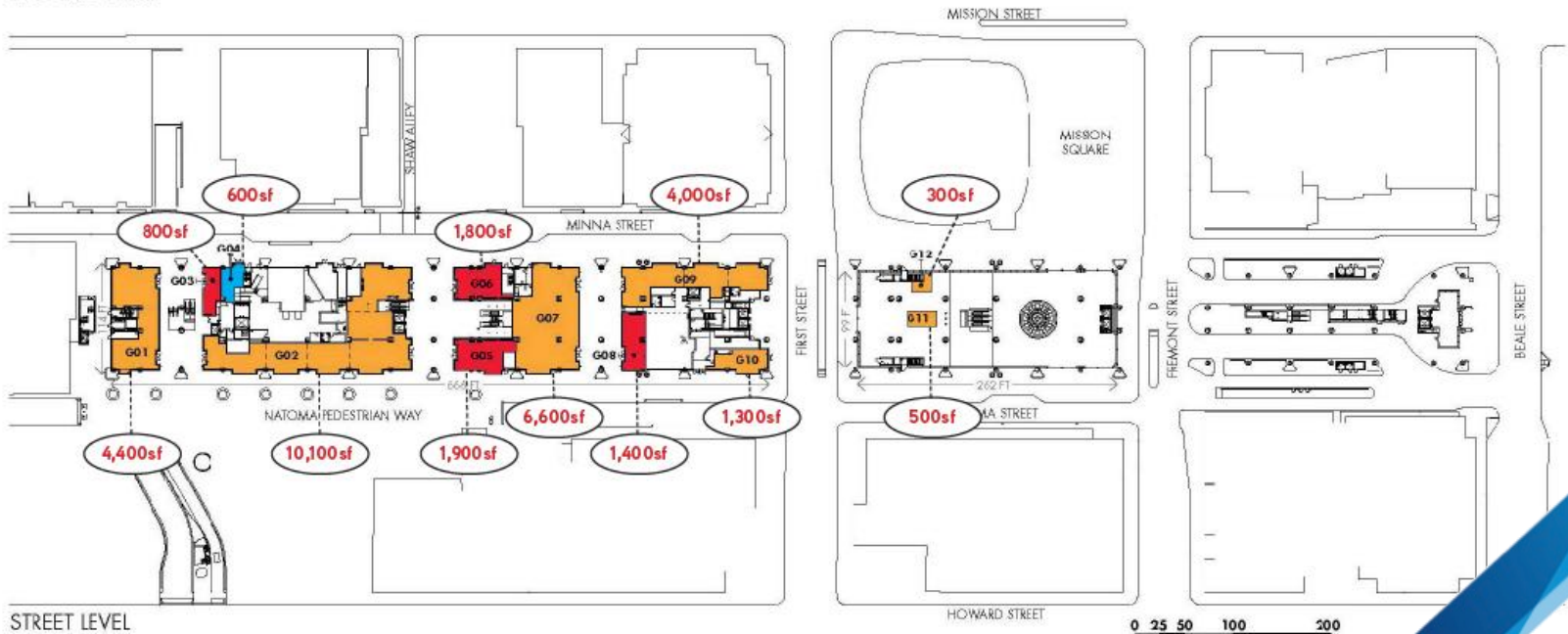
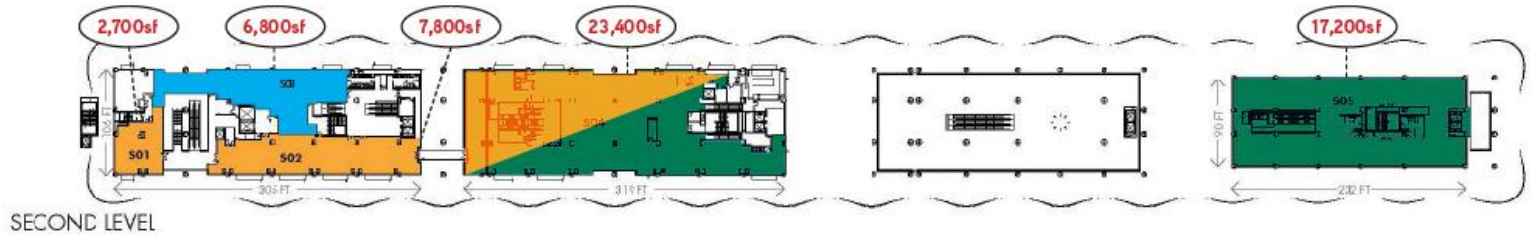
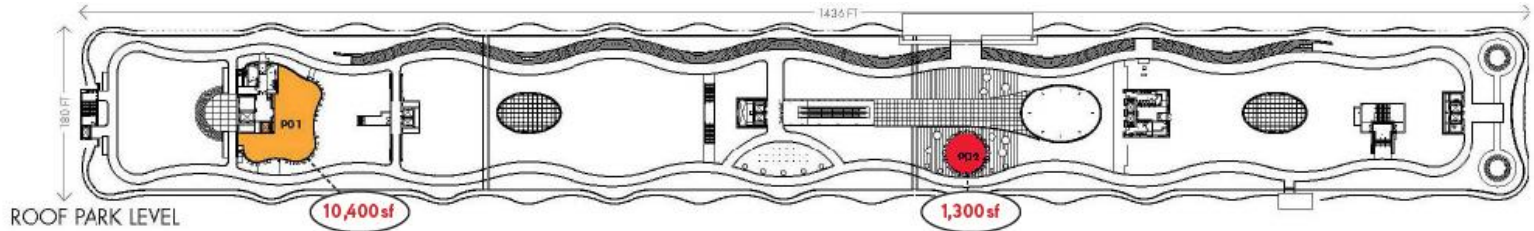
Broadcast by Pearl

Broadcast by Pearl

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# RETAIL VISION

## Transbay Commercial Space Plan



Category
Type I
Type II
Retail
Phase II



# RETAIL VISION

## Proposed Leasing Schedule

### Pre Construction & Construction

Step 1	<ul style="list-style-type: none"> <li>• Plans &amp; Permits for Landlord’s Work.....</li> <li>• Tenant’s Construction Documents Drawn.....</li> <li>• Restaurant ABC (Transfer of Liquor License).....</li> </ul>	Can start 60-90 days
		60 days
		30-180 days per license classification
Step 2	<ul style="list-style-type: none"> <li>• Landlord Work Commences/Ends.....</li> <li>• Tenant Permits.....</li> </ul>	60 days
		90-120 days
Step 3	• Tenant Construction.....	90-120 days

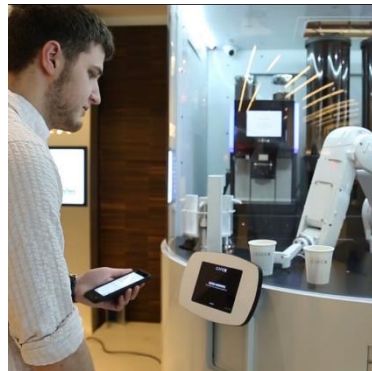
### Potential Temporary Activation Upon Center Opening



Food Trucks and Carts



Mobile Service Kiosks



Cool Vending Machine



Maker Tables & Classes

# RETAIL VISION

## Next Steps

### MERCHANDISING PLAN

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

### 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

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# 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.