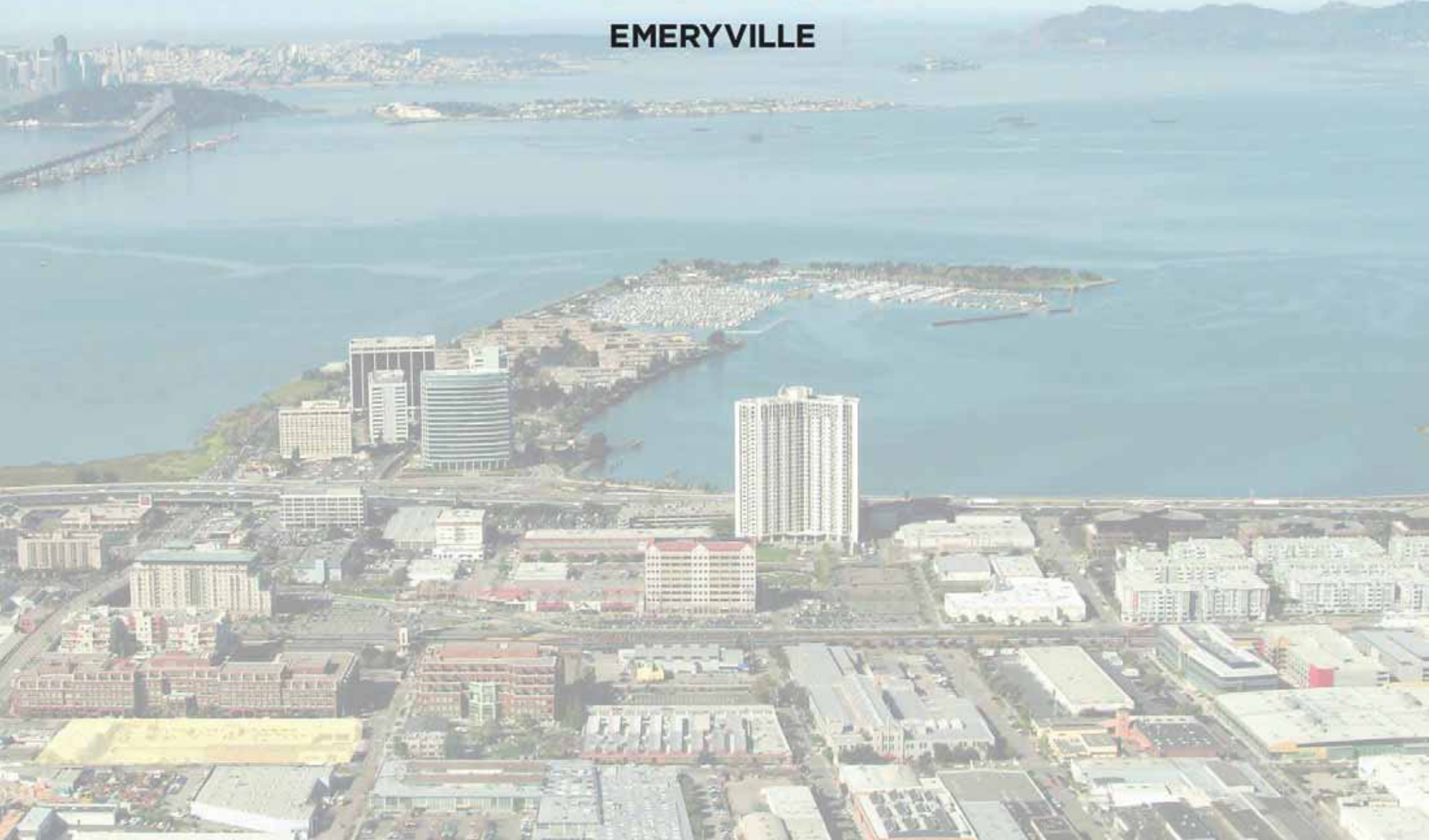




BAY STREET

EMERYVILLE



Bay Street By the Numbers

380,000 SQUARE FEET OF FASHION AND LIFESTYLE RETAIL serving a trade area of over **800,000 PEOPLE**

An urban oasis, a mall without the roof, Bay Street combines fashion, an IMAX and 16 screen AMC, dining, 500 residential units, bay views and a vibrant streetscape

Located at one of the most super regional retail locations in Northern California, over **700,000 CARS PER DAY** flow thru “The Maze” where I-80, I-580 and the Bay Bridge intersect

Bay Street is contiguous to **1,000,000 SQUARE FEET OF NEIGHBORING RETAIL** projects including IKEA, Trader Joe’s, Target and Nordstrom Rack

OVER 1,600 HOTEL ROOMS in the immediate area, **530 ROOMS ON SITE**



Who We Are

BAY STREET draws **AFFLUENT FAMILIES** who reside in the hills and **YOUNG** hipsters who live by the bay

OUR CLIENTELE IS SOPHISTICATED, WITH AN URBAN SENSIBILITY

Bay Street's primary shopper zipcodes are **PIEDMONT, MONTCLAIR, CLAREMONT AND THE OAKLAND HILLS**

Bay Street is surrounded by a **HIGHLY EDUCATED WORKFORCE** employed within minutes of the project at some of the most creative and innovative firms in the Bay Area; Pixar, Clif Bar, Electronic Arts, LeapFrog, Novartis (formerly Chiron) and the corporate offices for Peet's and Jamba Juice





Organized in three city blocks and connected by a main street, the project reflects its industrial architectural heritage and the bayside marina throughout streetscapes, plazas and green spaces

Live & BREATHE

Bay
Street



Bay Street is Home to...



J.CREW

VICTORIA'S
SECRET

SEPHORA

FOREVER 21

BANANA REPUBLIC

west elm

BARNES & NOBLE
BOOKSELLERS



P.F. CHANG'S



...and fifty other merchants

Bay Street is shopped

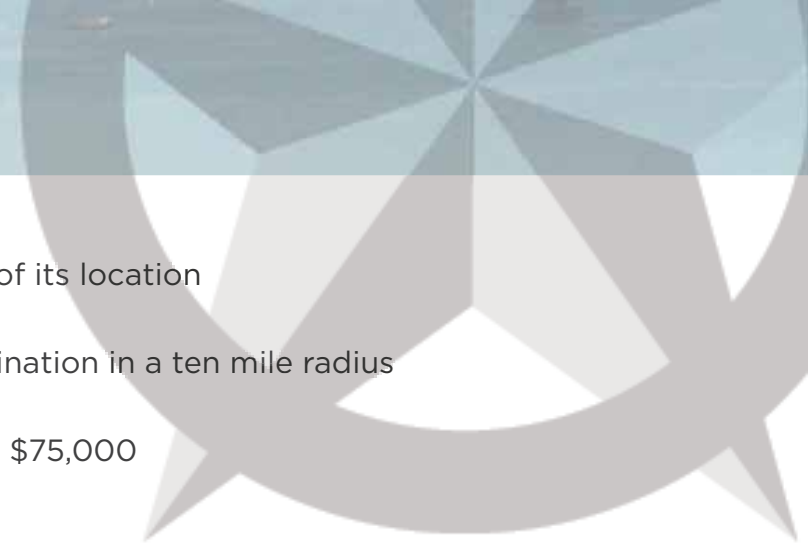
Monday - Friday by **OVER 9,000 PEOPLE PER DAY**

Weekends and holidays that number soars to **OVER 15,000 PER DAY!**

BAY STREET  EMERYVILLE







Bay Street Emeryville's trade area reaches **10 MILES NORTH AND SOUTH** of its location

CAPTIVE AUDIENCE Bay Street is the **ONLY** major regional shopping destination in a ten mile radius

TRADE AREA POPULATION totals approximately **832,000**, 39% earn over \$75,000

PRIMARY TRADE AREA POPULATION totals is approximately 330,000

PRIMARY TRADE AREA:

- Includes Emeryville, Alameda and nine surrounding Oakland and Berkeley zip codes
- Household income average is \$84,382, with 28% of the households earning \$100k
- Well educated population (56% have college degrees vs. 35% US)

	Bay Street			US Benchmark				
	Total Trade Area	Primary Trade Area	Secondary Trade Area	Total Trade Area	Primary Trade Area	Secondary Trade Area	ICSC Region 9	U.S.
TRADE AREA CHARACTERISTICS								
2012 Population	831,866	329,416	502,450	830,438	352,131	494,800	52,483,884	314,893,033
Population Growth (2012-2017)	6.6%	6.3%	6.8%	5.8%	5.5%	6.0%	5.9%	4.3%
2012 Households	326,130	146,517	179,613	308,577	132,931	181,703	18,477,425	119,804,240
Persons Per Household	2.6	2.3	2.8	2.7	2.7	2.7	2.8	2.5
Median Age	37.2	38.1	36.5	38.0	38.2	37.5	36.5	40.1
Average Age	42.8	43.4	42.3	42.5	42.7	42.4	42.5	42.7
Average Household Income	\$83,289	\$84,382	\$82,398	\$76,163	\$81,350	\$72,093	\$79,563	\$64,754
Median Household Income	\$63,988	\$61,317	\$66,167	\$58,106	\$61,084	\$56,260	\$62,235	\$51,865

BAY STREET IS THE MOST REGIONAL RETAIL DESTINATION ON THE 80 CORRIDOR, AND PROVIDES PERFECT STORE SPACING BETWEEN SAN FRANCISCO AND WALNUT CREEK

TradeAreaMap



BayStreetShopper

BAY STREET SHOPPER SUMMARY

Female: 72.5%

Average Age: 35.2

Household Income: \$100k+: 45.3%

College Educated: 60%

Spent \$97.91 and stayed on property 90 minutes

Caucasian: 43.8%, Asian: 22.9%

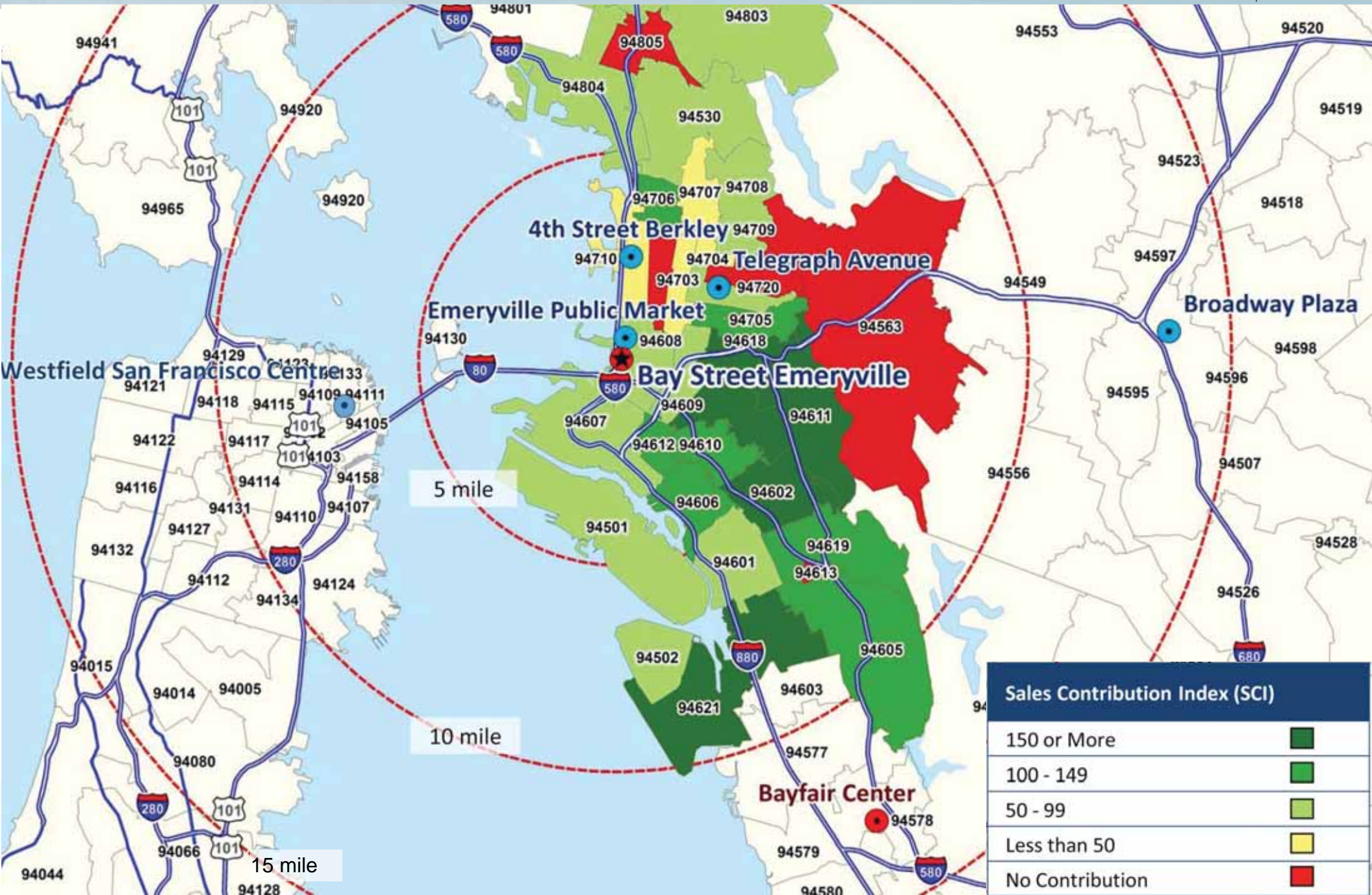
Resides within 19 min of the center: 55.7%



SHOPPER INCOMES AVERAGE \$113,482 at Bay Street Emeryville, more than double the trade area household average (\$83,289)

	All Shoppers	Trade Area Shoppers	Primary Shoppers	Secondary Shoppers	Tertiary Shoppers	US Benchmark
ALL SHOPPERS	100.0%	100.0%	44.9%	36.8%	18.4%	
GENDER						
Male	27.5%	22.0%	22.8%	21.0%	40.0%	34.7%
Female	72.5%	78.0%	77.2%	79.0%	60.0%	65.3%
AGE						
12-17	3.5%	4.5%	4.1%	5.0%	0.0%	5.7%
18-24	22.4%	24.7%	18.7%	32.0%	18.0%	17.9%
25-34	29.7%	26.9%	32.5%	20.0%	36.0%	21.2%
35-44	18.8%	21.1%	24.4%	17.0%	10.0%	20.0%
45-54	13.1%	9.9%	8.1%	12.0%	24.0%	16.1%
55-64	8.3%	9.0%	9.8%	8.0%	8.0%	10.8%
65+	4.2%	4.0%	2.4%	6.0%	4.0%	8.3%
Average Age	35.8	35.2	35.3	34.9	37.8	39.1
TOTAL HOUSEHOLD INCOME						
Less than \$30,000	8.5%	11.9%	13.4%	9.9%	2.3%	8.6%
\$30,000 - \$49,999	14.2%	13.7%	12.4%	15.5%	9.3%	18.8%
\$50,000 - \$99,999	32.0%	29.8%	24.7%	36.6%	41.9%	38.8%
\$100,000+	45.3%	44.6%	27.8%	33.8%	46.5%	33.8%
Average Household Income	\$113,482	\$110,104	\$121,031	\$95,176	\$117,151	\$71,462
ETHNICITY						
Caucasian/White	43.8%	43.0%	47.2%	38.0%	36.0%	61.0%
African American/Black	19.8%	21.1%	21.1%	21.0%	20.0%	16.6%
Hispanic or Latino	10.5%	12.6%	8.9%	0.0%	8.0%	13.5%
Asian	17.9%	15.2%	16.3%	14.0%	22.0%	5.2%
Other	8.0%	8.1%	6.5%	0.0%	0.0%	3.7%
OTHER						
Households with Children	37.1%	39.0%	34.1%	45.0%	34.0%	42.9%
College Graduate	61.0%	61.0%	70.7%	49.0%	62.0%	48.7%
Employed	68.1%	63.7%	67.5%	59.0%	76.0%	62.5%

Sales Contribution Index Map



Consumer Psychographic Profile

BAY STREET'S CONSUMER INCLUDES AN UPPER CRUST OF WEALTH that includes approximately One in Ten households, labeled as "Top Rung" and "Connoisseurs" **THEY ARE THE TWO WEALTHIEST SEGMENTS NATIONALLY.**

PSYCHOGRAPHIC PROFILES

TOP RUNG 4.3% of Bay Street consumer and 0.9% of US population

- The wealthiest consumer market
- Average household income \$182,041
- Purchasing power to indulge in any choice
- Travel in style, top market for owning or leasing luxury cars

URBAN CHIC 6.3% of Bay Street consumer and 1.4% of US population

- Most own expensive single-family homes
- Well educated professionals living an urban, exclusive lifestyle
- Married couple families and singles comprise most of these households, median age is 42.7 years
- Residents travel extensively, visit museums, attend dance performances, play golf and go hiking
- They use the internet frequently to trade or track investments, buy concert/sports tickets, clothes, flowers and books

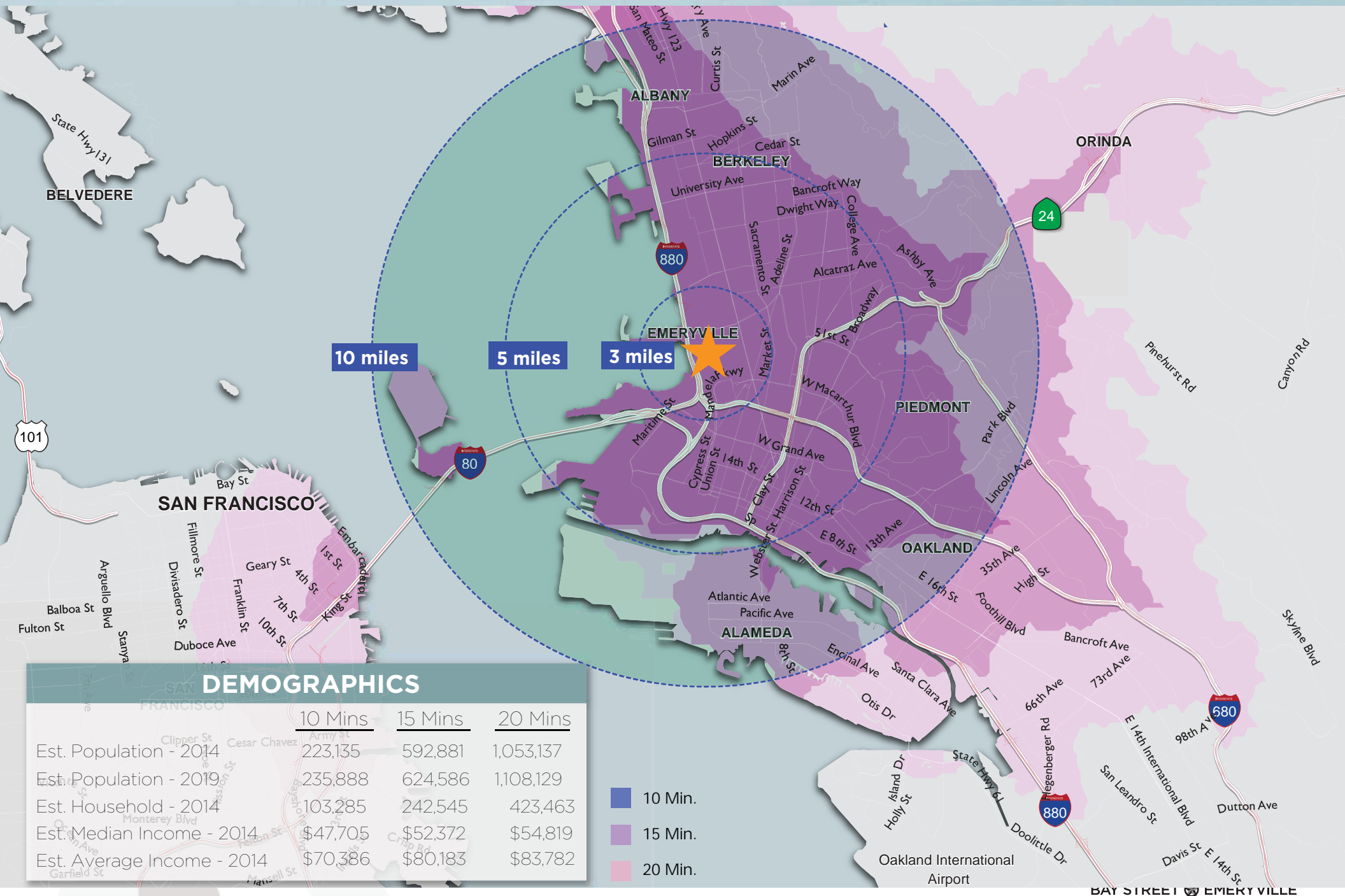
CONNOISSEURS 6.6% of Bay Street consumer and 1.3% of US population

- Well educated and somewhat older, median age 47 years
- Many of these married couples have children who still live at home
- Residents spend money for nice homes, cars, clothes and vacations

METRO RENTERS 17.4% of Bay Street consumer and 1.6% of US population

- Residents are young (approx. 30% in their 20%), well educated singles beginning their professional careers, median age is 37
- Most residents are renting apartments in high-rise buildings living alone or with a roommate
- Interest include traveling, reading, listening to music and public radio programs, and surfing the internet

DriveTimeMap



10 miles

5 miles

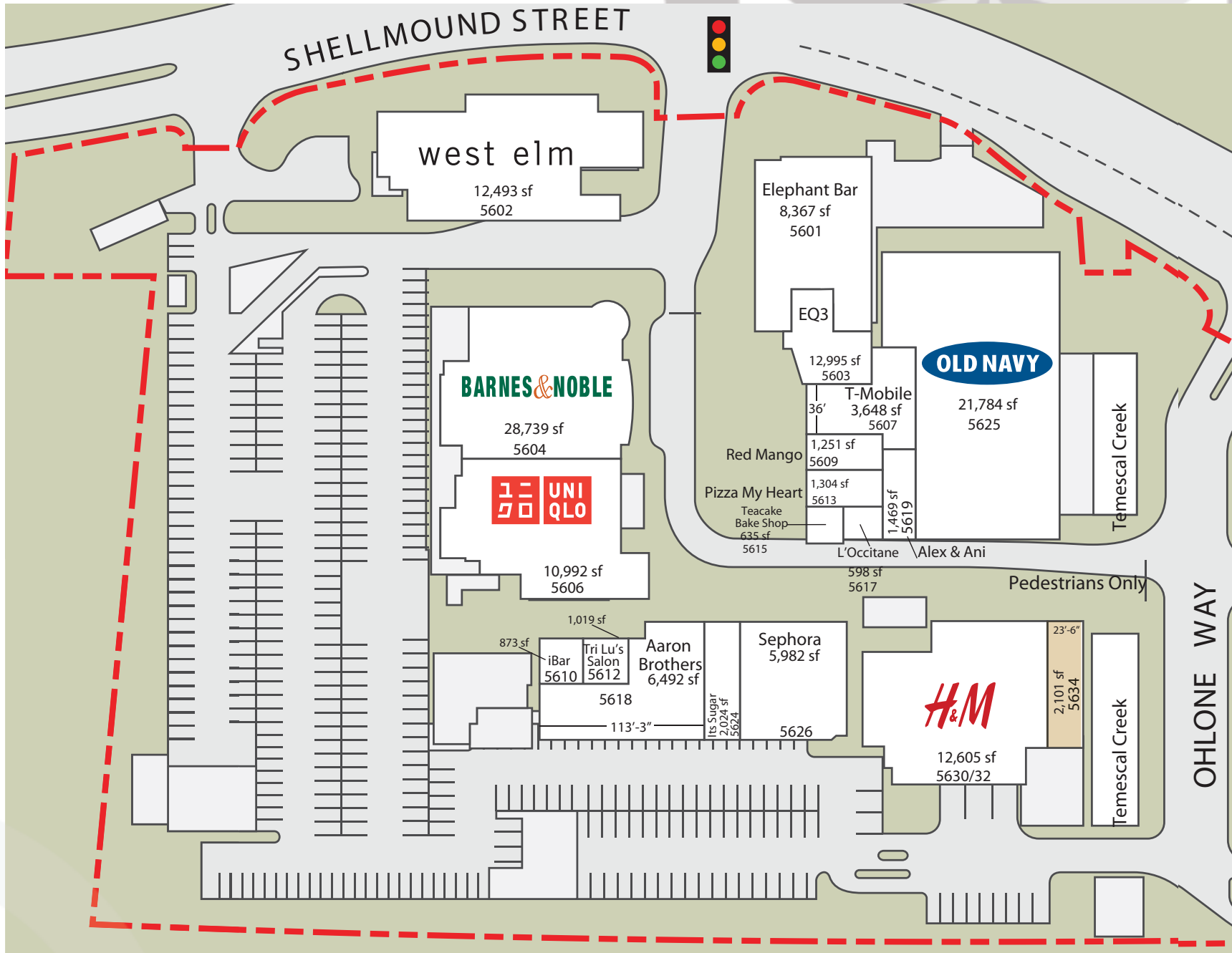
3 miles

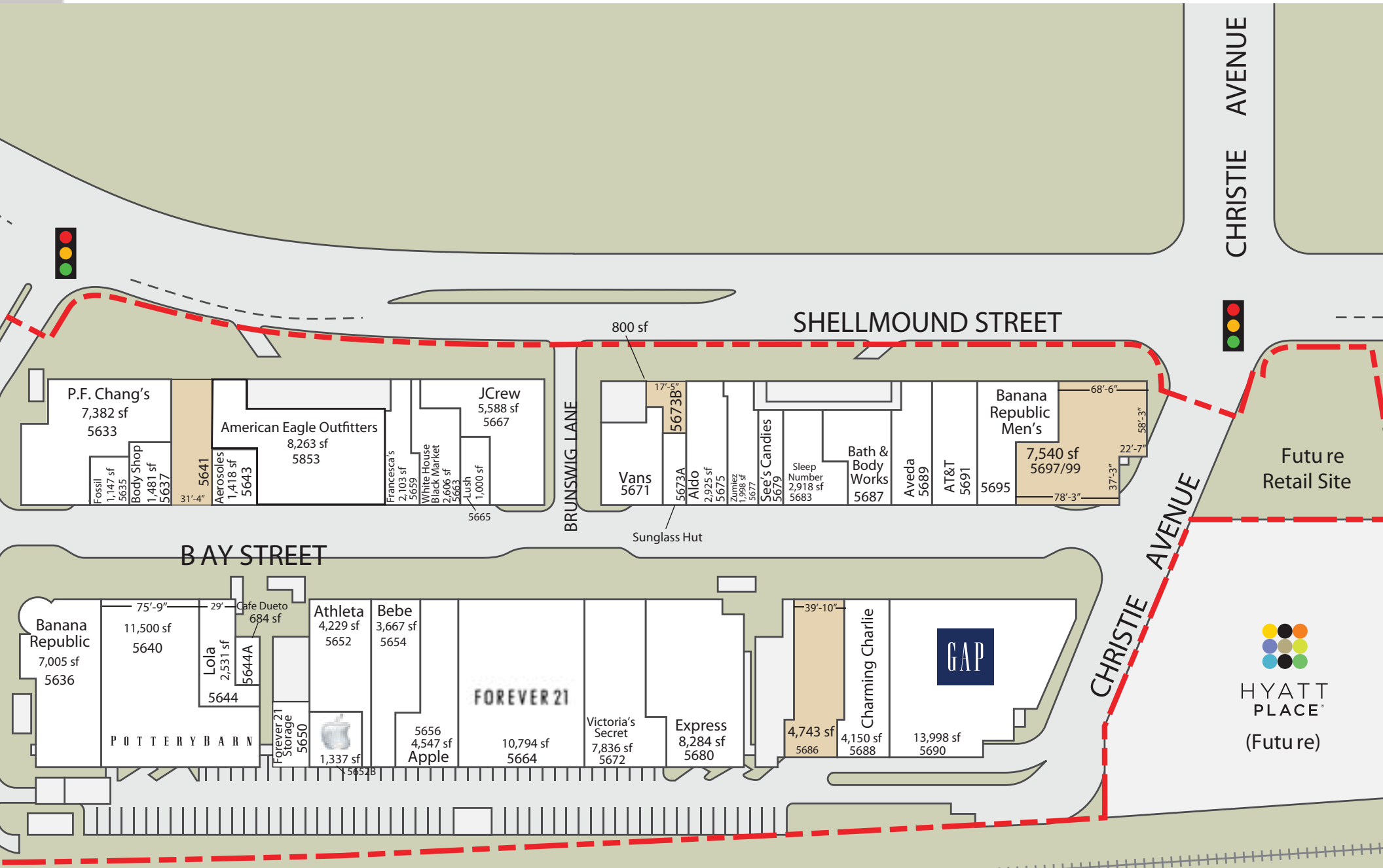
DEMOCRAPHICS

	10 Mins	15 Mins	20 Mins
Est. Population - 2014	223,135	592,881	1,053,137
Est. Population - 2019	235,888	624,586	1,108,129
Est. Household - 2014	103,285	242,545	423,463
Est. Median Income - 2014	\$47,705	\$52,372	\$54,819
Est. Average Income - 2014	\$70,386	\$80,183	\$83,782

- 10 Min.
- 15 Min.
- 20 Min.

Site Plan





CHRISTIE AVENUE

SHELLMOUND STREET

BAY STREET

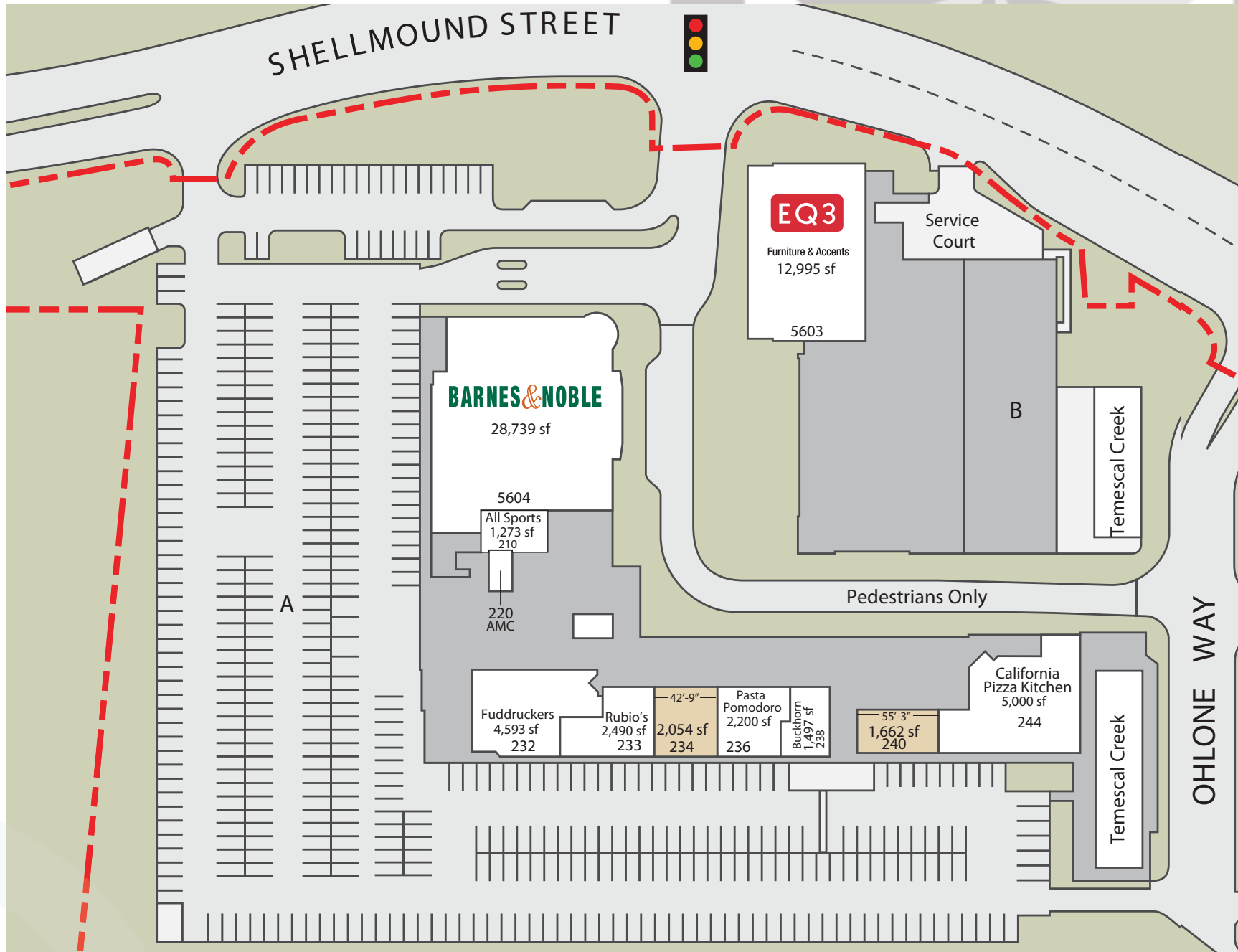
BRUNSWIG LANE

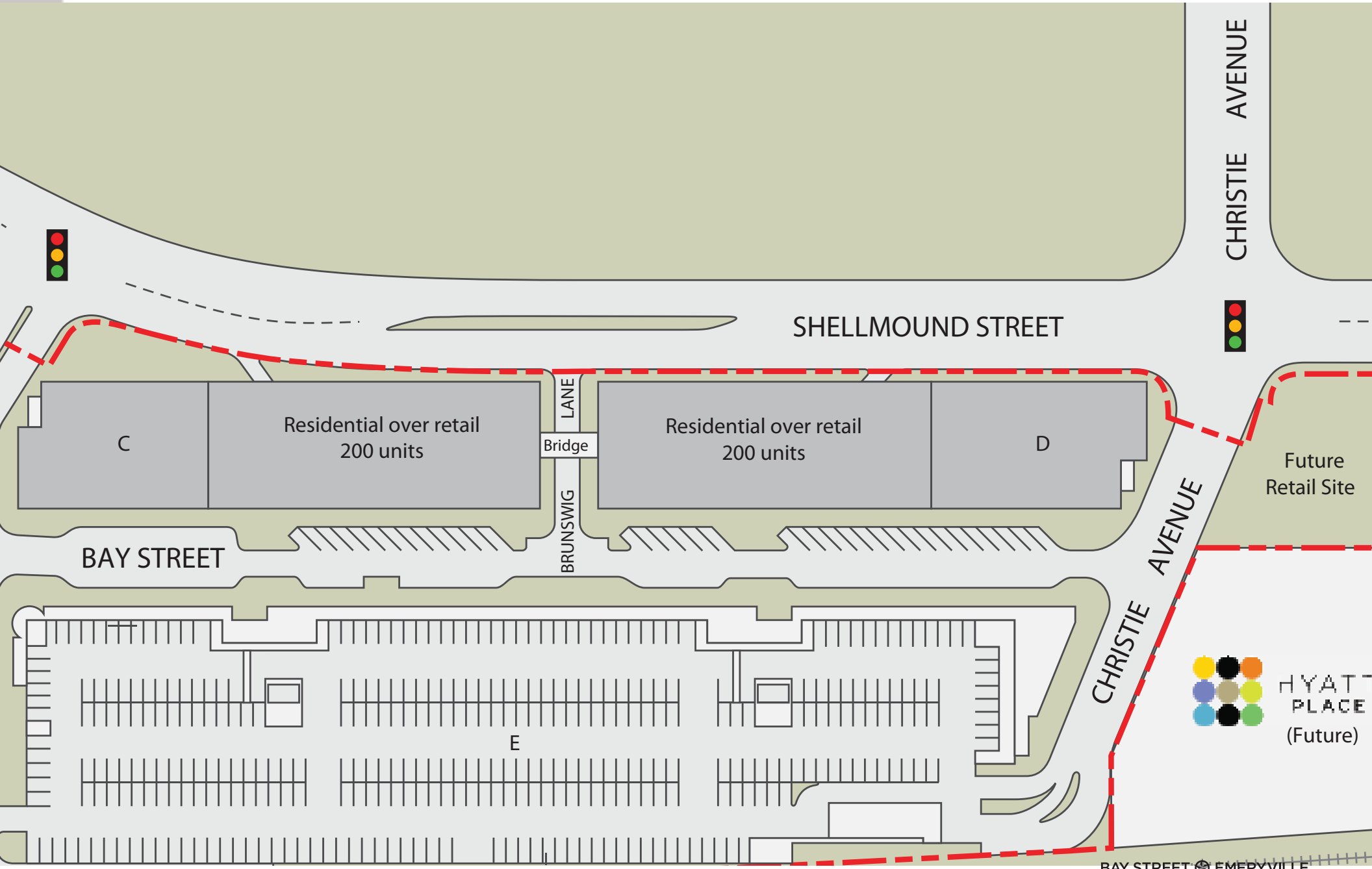
CHRISTIE AVENUE

Future Retail Site



Site Plan Second Level





CHRISTIE AVENUE



SHELLMOUND STREET

BRUNSWIG LANE

Bridge

Residential over retail
200 units

Residential over retail
200 units

C

D

Future
Retail Site

BAY STREET

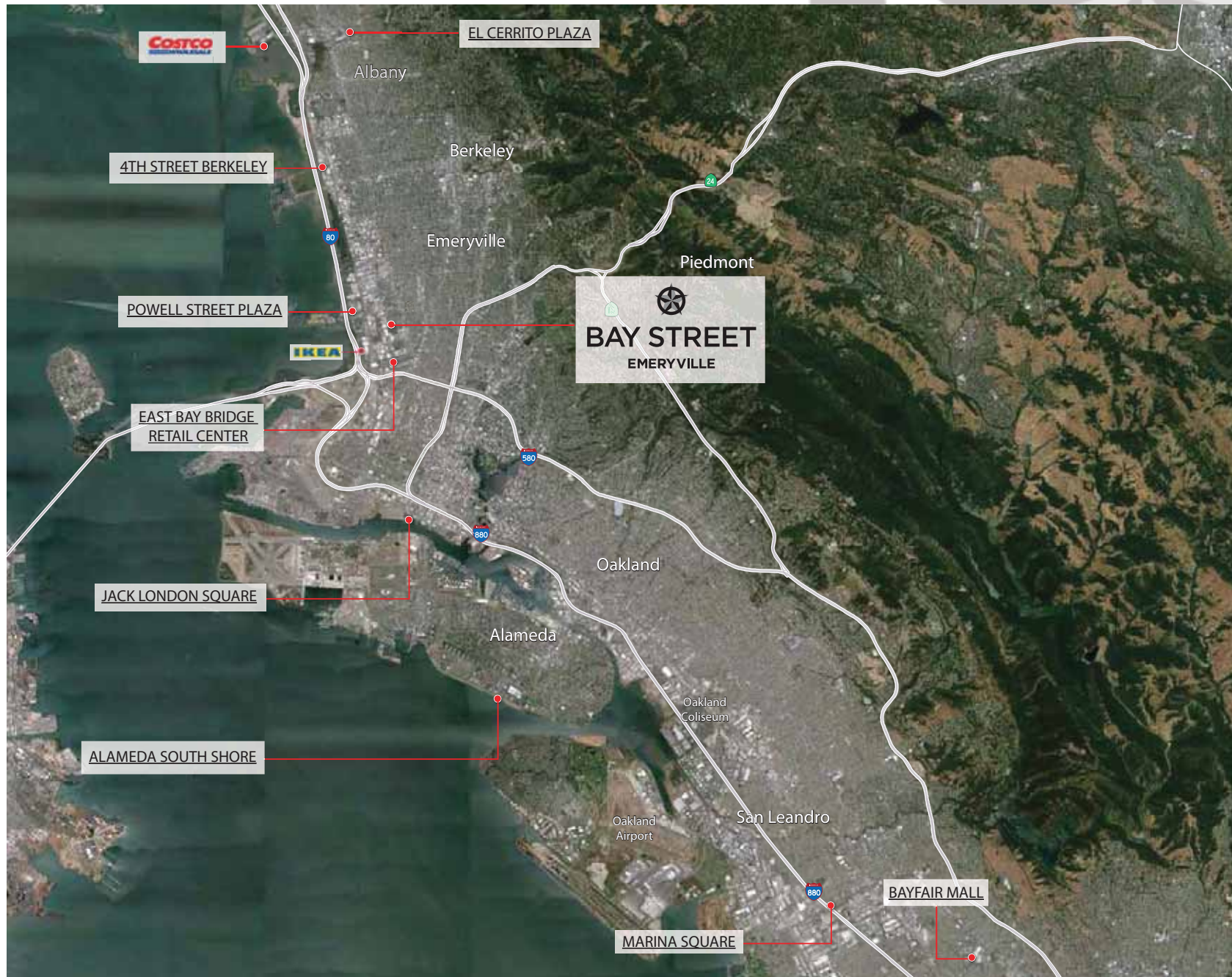
CHRISTIE AVENUE

HYAT PLACE
(Future)

E

BAY STREET @ EMERYVILLE

East Bay Aerial



Emeryville Aerial





BAY STREET

EMERYVILLE



Stephen Rusher

lic. 01439740

1 415 293 6297

steven.rusher@colliers.com

Julie Taylor

lic. 00998395

1 415 293 6295

julie.taylor@colliers.com

Lynne Thier

1 415 710 7517

lynneconsulting@gmail.com