



# RETAIL TRENDS 2019

November 14, 2019



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*“Retail”* ... what is it?

re·tail  
/ˈrē,tāl/

noun: **retail**; plural noun: **retails**

1. the sale of goods to the public in relatively small quantities for use or consumption rather than for resale.

<https://en.oxforddictionaries.com/definition/retail>





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**Types: Commodity Retail**

- A retailer selling goods and services which are consumed without emotional connection by the consumer and for which the consumer's **primary motivation is price and convenience**.
- Examples include grocery and drug stores, mass merchants such as Costco, Target or Wal-Mart, office supply stores such as Staples or Office Depot, or electronics, books and music.

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## Types: Specialty Retail

- Retailers selling goods and services which are consumed on a **discretionary** or emotionally-driven basis using discretionary funds/income, and where **experience and a sense of place is a primary component** when deciding how and where to spend discretionary time.\*
- Examples include fine dining, clothing, luxury hard and soft goods, or electronic, books and music, and even specialty shopping districts.
- \* With the rise of platforms and influencers, the importance of "place is evolving."



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# OMNICHANNEL... WHAT IS IT?

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## How are retail channels used?



Omnichannel strategies work differently for commodity and specialty retailers.

- For example, multiple retail channels might be used by a consumer in purchasing a particular COMMODITY like a television (eg. research online at home, price checking on a phone while at a retail store).
- By contrast, a SPECIALTY retailer might use aps, ads, and social media strategies to drive customer traffic to a brick-and-mortar store, restaurant, or shopping district.
- **Commodity retail, where consumed through non-bricks-and-mortar channels, is driving freight activity.**

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### New Era Demands New Thinking

“Real estate as an asset class has matured. Market participants need to realize this and make the appropriate adjustments.”

<https://americas.uli.org/research/centers-initiatives/center-for-capital-markets/emerging-trends-in-real-estate/americas/>



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➤ Consumers are interested in what their peers and friends are buying, and *not* buying.



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- When an “influencer” buys, endorses, or rejects a product, that message can have a wide-ranging impact, particularly when the influencer has a wide social network.
- This phenomenon is particularly true with consumables like beauty products.
- **Social commerce also has particular significance for the resale market where, for example, someone might put or see something on-line, and then tell their friends about it...creating hype.**



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## Retail Apocalypse Now



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## ULI Emerging Trends 2019 - Platforms

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### ULI Emerging Trends 2019 - Platforms

- Retail isn't dying, it has reoriented to more efficient platforms that give consumers one-stop shopping.
- The media routinely conflates all on-line shopping with Amazon, however, this is not the case.
- **Retail is as or more robust and diversified than at any time in memory.**
  - For example, the Canadian e-commerce platform Shopify started in 2004. As of 2017, it had 600,000 sellers.
  - According to the 2018 letter to shareholders, over 5 million Amazon Marketplace sellers account for over 50% of total sales.

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### Mom and Pop is Evolving



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- **Thredup, Craig's List, and Ebay are examples of how an individual can easily conduct B/C2C transactions.**

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### ULI Emerging Trends 2019 - New Equilibrium

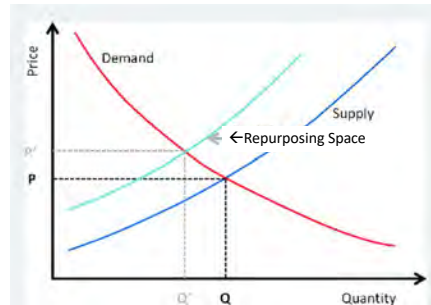
- **We have 24 SF of retail per capita in the US. This compares with 16 SF in Canada, and approximately 5 SF in Europe and parts of Asia.**



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- **A new equilibrium with less square feet of retail per capita is likely being established as space devoted to retail is being repurposed or replaced with new uses.**



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- A new equilibrium with less square feet of retail per capita is likely being established as space devoted to retail is being repurposed or replaced with new uses.
- Even the strongest retail projects need broad reasons for customers to visit.
- Uses ranging from medical and educational services to distribution activity, with mixed-use or dense settings adding further support.
- **The headlines should be 'What kinds of Brick-and-Mortar Retail Will Survive' and 'How will we repurpose unneeded retail space?'**

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## ULI ET19 - Landlord-Tenant Relations

- The customization and localization of the shopping experience is more important now than ever.
- **Successful landlords will ask "WHY?" ... a lot!**
  - Why should a tenant be in a project?
  - Why does the consumer care?
  - Why should a LL want it be in a project?
  - What is the retailer's plan?
  - How they will complement co-tenants to create a mix that's pertinent today?

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- We can now measure footfalls in projects, and a center with a higher rate of increase of footfalls (think comp store sales), should generate a higher rent.
- A retailer with a larger social following will be sought after just as a retailer with high sales per square foot was in the past.
- **How are LL's protecting themselves?**
  - **Every 5 years tenants are reinventing themselves...what tenant lasts for 20 years?**
  - **A long lease term on a new tenant is a risk when there is no way of knowing if the tenant will be relevant in 5-10 years.**

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### ULI Emerging Trends 2019 - Location-LOCATION-LOCATION

- Location remains critically important for retail, however, traditional "beacons" are changing from traditional monument signs to influencers and social media.



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- Location remains critically important for retail, however, traditional "beacons" are changing from traditional monument signs to influencers and social media.
- For example, reviews on Yelp and Google Maps drive bricks-and-mortar visits, often to locations other than at the traditional 100% corner or bottom of a freeway off-ramp.
- **Traditional retailers need to find new and better beacons than traditional signage for consumers to find and patronize them, and to continue to compete.**



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### We haven't even discussed...

- AI
- Virtual Reality
- Site Selection Tools

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## Today's Panel

**Panelists:**  
Joel Pullen, Planning Division Manager, City of Fremont  
Shawn Lange, President, L2F, Inc.  
Gunjan Garg, Founder, HearthyFresh  
Jeff Kreshek, SVP West Coast Leasing, Federal Realty

**Moderator:**  
David Greensfelder, Managing Principal, Greensfelder Real Estate Strategy

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## Questions ... and Answers



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- STRATEGY AND PLANNING
- MARKET AND LOCATION INTELLIGENCE
- DEVELOPMENT MANAGEMENT

## ABOUT GREENSFELDER REAL ESTATE STRATEGY

Bay Area-based Greensfelder Real Estate Strategy provides strategic planning, market analytics and location intelligence, and real estate development services to occupiers, communities, financial institutions and investors. Always focused on practical solutions and implementation, Greensfelder has particular expertise in economic development, redevelopment planning, retail resilience including repositioning regional malls, and providing fee development services to pre-IPO emerging companies. Significant assignments include developing comprehensive retail and economic development strategies for cities such as updating San Jose, California's Citywide and Downtown Retail Strategies, market evaluation and strategy for retailers and institutional owners including crafting a Bronzeville (Chicago, IL) retail positioning and feasibility analysis and the Vallco Fashion Mall redevelopment (Cupertino, California), and development services including mixed-use project implementation, land-use and entitlement strategy, and project economics.

## ABOUT DAVID GREENSFELDER



David Greensfelder, founder and Managing Principal, always focuses on real world, implementable real estate strategies and solutions for commercial (retail and office) and mixed-use projects. He has driven more than 350 projects spanning over 7 million SF with a finish market value estimated at over \$1.25 billion.

David is a specialist in economic development and redevelopment planning, retail resiliency, understanding retail opportunities by differentiating between commodity and specialty retail, and analyzing the impacts of competing retail channels on bricks-and-mortar storefronts. David recently authored the *Retail and Last Mile* narrative in ULI-pwc's *2019 Emerging Trends in Real Estate* where he discussed how influencers, platforms, an evolving landlord-tenant relationship, and a new equilibrium between retail and other product types is reshaping the retail landscape, and how the "last mile" is the least understood and biggest force impacting all product types. David serves on National Academy of Sciences NCHRP research panels as an urban economics and last-mile expert.

David has managed the corporate real estate function for Fortune 500 companies such as Longs Drugs, and start-up and emerging companies such as solar firm Sungevity and Community Foods Market. David has implemented preferred development programs for Fortune 10 companies such as CVS/health as well as multi-channel start-ups. Skilled at managing organizational dynamics, and community and public meetings, David knows how to navigate organizational dynamics, how to diffuse opposition, and values transparency and open communication.

David frequently lectures at UC Berkeley's Fisher Center for Real Estate and Urban Economics, and MRED+D programs (where he is a Distinguished Visiting Fellow), the Haas Graduate School of Business, at USC's Lusk Center for Real Estate Development, and teaches ULI's Mixed-use Development Best Practices Professional Development program. He is a Director of Satellite Affordable Housing Associates and the Center for Creative Land Recycling, is an active ULI member (Urban Revitalization Council, Advisory Services, Education programs, and UrbanPlan and UP4PO steering committee, instructor, and trainer), and ICSC's P3 National Steering Committee. David graduated from Pitzer College (The Claremont Colleges) with a degree in Business Economics, and the SciARC Foundation Program.



- STRATEGY AND PLANNING
- MARKET AND LOCATION INTELLIGENCE
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## QUALIFICATIONS, SIGNIFICANT PROJECTS, AND CLIENTS

### ABOUT GREENSFELDER REAL ESTATE STRATEGY

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### GREENSFELDER PRIMARY CONSULTING AREAS

- ◆ **Economic Development Strategy including Retail Resilience™ and Sustainability**
  - Retailer multichannel and omnichannel impacts on bricks-and-mortar retail
  - Emerging trends, market analysis, market entry, location intelligence
  - Thriving downtown districts
  - Commodity and specialty differential retail analysis
- ◆ **Transformative Real Estate Planning and Strategy**
  - Redevelopment planning
  - Managing sales tax impacts from an evolving retail marketplace
  - Mixed-use: best practices for integrating commercial uses in mixed-use environments
  - Positioning/repositioning and strategy for projects that once worked but now don't (including repositioning of "dead malls")
- ◆ **Owner's Representative (Program Management and Fee Development Services)**
  - Retail, office, and mixed-use projects
  - Location intelligence, due diligence and risk assessments, and development services
- ◆ **Dispute Resolution, Litigation Support and Expert Witness Services**

### THOUGHT LEADERSHIP

- ◆ ULI/PwC *Emerging Trends in Real Estate 2019*, Author, Retail and Last Mile Distribution Trends Sections
- ◆ Last Mile Implications on Land Use, National Academy of Sciences Transportation Research Board

### SELECTED PROJECTS AND AWARDS, and REPRESENTATIVE CLIENT LIST

#### Economic Development and Redevelopment Planning Strategy ... *for Communities*

- ◆ Association of Bay Area Governments/Metropolitan Transportation Commission - One Bay Area Plan retail task force advising on best practices for integrating commercial into priority development areas
- ◆ BAE Urban Economics - Various economic development projects (team)
- ◆ City of Albany, California - Economic Development Strategic Plan



- ◆ City of Boulder, Colorado - Citywide Retail Study
- ◆ City of Calistoga, California - Business and Retail Strategy Study
- ◆ City of Capitola, California - Address regional mall competitiveness and reuse in changing retail landscape
- ◆ City of Chicago, Illinois Planning and Urban Design Division, Department of Housing and Economic Development - Retail strategy
- ◆ City of Cupertino, California - Retail market/focus sites feasibility study and Vallco Mall redevelopment strategies for a general plan update, and ballot initiative (\$9212) analysis
- ◆ City of Dublin, California - Downtown Specific Plan implementation; CC&R amendment and restatement
- ◆ City of El Cerrito, California - San Pablo Avenue PDA Specific Plan Update
- ◆ City of Foster City, California - Commercial real estate market and opportunity site analysis
- ◆ City of Fremont, California - Irvington District Land Use Conversion Study; expert planning commission and city council testimony about pending mixed-use project applications
- ◆ City of Kansas City, Missouri - North Loop ULI Advisory Services Panel
- ◆ City of McKees Rocks, Pennsylvania - Community Rebuilding ULI Advisory Services Panel
- ◆ City of Los Banos, California - Retailer entry study
- ◆ City of Milpitas, California - Best practices for integrating commercial into mixed-use projects
- ◆ Cities of Morgan City and Berwick, Louisiana - Building the Foundation for a New Economy ULI Advisory Services Panel
- ◆ City of Morgan Hill, California - Economic Blueprint
- ◆ City of Oakland, California - Broadway-Valdez Specific Plan peer review panel
- ◆ City of Pacifica, California - On-call planning and economic development consulting
- ◆ City of Provo, Utah - Provo Town Center Mall evaluation and repositioning strategy
- ◆ City of Redwood City, California - Downtown retail and hospitality evaluation
- ◆ City of San Carlos, California - Downtown redevelopment project evaluation
- ◆ City of San Jose, California - Citywide and Downtown retail strategy updates
- ◆ City of San Ramon, California - Economic Development Specific Plan and General Plan updates
- ◆ City of Santa Clara, California - Corridor study and retail revitalization assessment; Downtown Precise Plan
- ◆ City of Sunnyvale, California - Economic Development Specific Plan
- ◆ City of Taylorsville, Utah - Commercial Centers Master Plan and Feasibility Study
- ◆ City of Vacaville, California - Downtown Specific Plan
- ◆ City of Vancouver, Washington - Commercial Corridors Strategy
- ◆ First Carbon Solutions - Economic Development Specific Plan and General Plan updates
- ◆ Leland Consulting Group - Various economic development projects (team)
- ◆ MIG - Various economic development projects (team)
- ◆ SACOG Civic Lab - Sacramento-area commercial corridors study
- ◆ Site Works - Field work and analysis for retail investment and redevelopment projects (various)
- ◆ Strategic Economics - Various economic development projects (team)
- ◆ Urban Field Studio - Various land planning, program development and economics projects (team)
- ◆ Washington, DC - Rock Creek West planning area housing affordability study ULI Advisory Services Panel
- ◆ WRT - Various economic development projects (team)

#### **Market and Location Intelligence, and Program and Development Management ... *for Users***

- ◆ AlterG, Inc. - Retail prototype development, and market entry strategy and financial analysis
- ◆ Crown Books - Programmatic retail expansion development strategy and implementation



- ◆ **CVS/Health** - San Francisco Bay Area new market entry analysis, strategy, and implementation of programmatic new store development program; integration analysis for Long's Drug Stores acquisition
- ◆ **Decathlon** - U.S. market entry strategy for French sporting goods retailer
- ◆ **Eatzi's (Brinker International)** - Programmatic retail expansion development strategy and implementation
- ◆ **Group 4 Architecture Research and Planning** - Redevelopment program management
- ◆ **Halo Top Creamery** - Retail program and new store development and initial store rollout
- ◆ **High Tech Burrito** - Programmatic retail expansion development strategy and implementation
- ◆ **Longs Drug Stores** - Programmatic retail expansion development strategy and implementation
- ◆ **PG&E** - Retail potential analysis for conversion of a decommissioned brownfield site
- ◆ **Community Foods Market** - "Food Desert" real estate market study, and program management overseeing development of a community grocery store in Oakland, California
- ◆ **Silicon Valley "Big 4" tech company** - Campus master plan feasibility study
- ◆ **Sungevity, Inc.** - Program management for 75,000 SF office HQ redesign and remodel, and out-of-state site location and 75,000 SF new facility development (winner of the Kansas City CSI's Excellence in Design Award, 2016)
- ◆ **Uniqlo (Fast Retailing)** - U.S. market entry strategy for Japanese clothing retailer

#### **Market Analysis and Strategy ... for Owners and Investors**

- ◆ **Borel Private Bank & Trust Company** - Project asset and development management
- ◆ **Boston Private Bank & Trust Company** - Project asset and development management
- ◆ **Ohio STRS** - Analysis for shopping center repositioning and potential mixed-use addition/redevelopment
- ◆ **Ramco Gershenson** - Retail market evaluation and investment potential analysis
- ◆ **Scanlan Kemper Bard** - Redevelopment program for WestGate San Leandro, a 675,000 SF mixed-use retail-office project
- ◆ **Wrightwood Capital** - Pre-foreclosure market positioning analysis for a 350,000 SF regional power center
- ◆ **Family Offices (various)** - Project repositioning, project entitlements, and anchor retail tenant negotiation of business and lease terms (new stores and repositioning)
- ◆ **Hedge Funds** - Angelo Gordon, Bain & Company, Boston Consulting, DB Zwirn, Harris Assoc., HIG Capital, Karsch Capital, KDI Capital Partners, QVT Financial LP, SAC Capital, Scout Capital, Sheffield Mgt, Sigma Capital Mgt, Teton Capital, Wellington Mgt, and Whale Rock Capital Mgt LLC

#### **Market Analysis and Program Management ... for Owners and Developers**

- ◆ **Athenian Razak** - Various Philadelphia, PA and Camden, NJ retail projects
- ◆ **Black Equities** - Project asset and development management
- ◆ **Bridge Housing** - Integration of commercial in a mixed use project
- ◆ **Burlingame Plaza Owners' Association** - Shopping center repositioning and remodel (scope-of-work, budget, and planning)
- ◆ **CallisonRTKL** - Integration of commercial in large mixed-use districts
- ◆ **Draper & Kramer** - Trade area definition and retail sales potential analysis for large-scale redevelopment project in Chicago, Illinois
- ◆ **Dutra Cerro Graden** - Development of financial modeling tools for a real estate firm serving community benefit organizations
- ◆ **The Irvine Company** - Property acquisition strategy
- ◆ **Kamehameha Schools (Bishop Estate)** - Supportable commercial determination, and strategy for integration of commercial in multiple large urban mixed-use redevelopment districts



- ◆ **LandMark Retail Group** - Fortune 20 retailer development strategy and execution
- ◆ **Long Island (NY) Mixed-use** - Planning consulting for redevelopment of a former hospital site including budget and schedule, entitlement, anchor tenant leasing
- ◆ **Lyon Homes** - Integration of commercial in a mixed-use project
- ◆ **The Prado Group** - Retail tenant negotiation
- ◆ **Pulte Homes** - Integration of commercial in a horizontally-integrated mixed-use project
- ◆ **Raintree Partners** - Integration of commercial in a vertically-integrated mixed-use project
- ◆ **Scannell Properties** - Analysis for acquisition and redevelopment of an Oakland, California site
- ◆ **SummerHill Apartment Communities** - Analysis of potential retail uses and accompanying site plan recommendations for a 26-acre vertically-integrated mixed-use project
- ◆ **Warmington Homes** - Analysis and recommendations for commercial feasibility in mixed-use projects

## EDUCATION AND SPEAKING ENGAGEMENTS

- ◆ UC Berkeley Haas Graduate School of Business
- ◆ UC Berkeley Graduate College of Environmental Design
- ◆ UC Berkeley MRED+D Distinguished Visiting Fellow
- ◆ USC Lusk Center for Real Estate Studies
- ◆ ULI School of Professional Development
- ◆ ULI UrbanPlan (Volunteer and Trainer)
- ◆ ULI UrbanPlan for Communities (Instructor)
- ◆ American Planning Association
- ◆ International Downtown Association
- ◆ Urbanism Next Conference
- ◆ Non-Profit Housing Association of Northern California (NPH)
- ◆ National League of Cities
- ◆ California League of Cities
- ◆ AIA/SF
- ◆ SPUR, San Francisco
- ◆ Local Government Commission
- ◆ Silicon Valley Economic Development Alliance (SVEDA)/Joint Venture Silicon Valley
- ◆ Bay Area Planning Director's Association
- ◆ KB Home Community Advisory Board
- ◆ Bay Planning Coalition
- ◆ Connect Silicon Valley
- ◆ Oakland Chamber of Commerce Retail Advisory Committee (ORAC)
- ◆ Northern California Apartment Summit
- ◆ California Building Conference
- ◆ ICSC Programs: Northern California Alliance Program (chair/speaker/ moderator), San Francisco IDEX (chair/speaker/moderator), Monterey IDEX (speaker/moderator), ReCon (moderator), Bay Area Local Programs (chair), Los Angeles Local Programs (speaker), University of Shopping Centers (faculty)
- ◆ Cities of Capitola/Capitola Chamber of Commerce, Hercules, Merced, Morgan Hill, and Suisun City

## RECENT PRESENTATIONS AT PROFESSIONAL CONFERENCES

- ◆ Retail and Mixed-use Best Practices (ULI Professional Development Program and Webinar)
- ◆ Goodbye, Main Street? (SPUR SF)
- ◆ How Technology is Affecting Retail and Urban Real Estate Development
- ◆ Potential Impact of Emergent Technologies on Freight Related Land-Uses in Urban Areas
- ◆ Planning for Retail in an On-line World
- ◆ Urban Planning and Place-making for Dynamic Communities (APA approved for AICP CM credits)
- ◆ San Jose's Approach to Retail Restructuring
- ◆ The Changing Nature of Retail and Its Impacts on Local Governments
- ◆ The ABC's of the XYZ Generations: The Essential Guide to Understanding, Communicating and Marketing to Demographic Alphabet Soup
- ◆ The Urban Core: Analysis of Development, Investment & Financing Opportunities in San Francisco



- ◆ The New Normal...How Retailers Think: A Public Sector Primer on the Retailer Decision Process
- ◆ Omni-channel Marketing: A Seamless Approach to Retailing Across Channels, from Social Media to Bricks & Mortar
- ◆ AIA/SF Strategic Growth Symposium - Economic Outlook.
- ◆ Rediscovering Main Streets and Strategies for a Thriving Downtown.
- ◆ Factors Affecting the Viability of Retail in Mixed-use Projects.
- ◆ Planting Your Vision in the Ground: Getting Good Projects to Pencil Out.
- ◆ Retail Site Selection Decisions - The Inside Story.
- ◆ Exploring the Feasibility of a Merger, the AHA/Satellite Experience.
- ◆ Maximizing Retail During Changing Times - A Post Redevelopment Primer.
- ◆ Building Livable Communities: From the Vision to the Ground - Making Smart Growth Pencil Out.
- ◆ SB375 and One Bay Area Plan Implementation and Implications.

## **OTHER PROFESSIONAL AFFILIATIONS AND INVOLVEMENT**

- ◆ Urban Land Institute (full member):
  - UrbanPlan and UrbanPlan for Public Officials Steering Committees, UrbanPlan for Public Officials Instructor, Volunteer Trainer, Classroom Volunteer, School Champion
  - Advisory Services (national panels)
  - Education - Mixed-use and Retail Best Practices Instructor
  - Urban Revitalization Product Council
- ◆ National Academy of Sciences - Transportation Research Board Appointee
  - National Cooperative Highway Research Program 08-111: Effective Decision Making Methods for Freight-Efficient Land Use
  - National Cooperative Highway Research Program 08-134: Integrating Freight Movement into 21<sup>st</sup> Century Communities' Land Use, Design, and Transportation Systems
- ◆ International Council of Shopping Centers (member):
  - P3 National Steering Committee
  - Past State Retail Chair, and co-founder and Past Chair N. Calif. Alliance Program
  - Northern California Program Committee (1994-present); past Program Committee Chair
- ◆ Satellite Affordable Housing Associates: Board of Directors, Finance Committee, Development Committee (Past Chair), Audit Committee, Past Board Vice President and Executive Committee member, AHA/Satellite Merger Task Force
- ◆ Center for Creative Land Use Recycling: Board of Directors, Finance Committee, executive director search
- ◆ Oakland Retail Advisory Committee and Oakland Land Use Committee, Founding Member
- ◆ Bay Area Council Member Representative / Legislative Retreats
- ◆ Shopping Center World Editorial Advisory Board

## **CONTACT INFORMATION**

David Greensfelder, Founder and Managing Principal

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