



JACKSONVILLE WATERFRONT

PREPARED FOR DIA
JANUARY 3, 2024

STREETSENSE

In developing a vision for two new waterfront parks, DIA is breathing new life into the heart of downtown Jacksonville by inviting the larger community to once again engage with the waterfront through multi-dimensional, amenitized spaces.

Streetsense has prepared a comprehensive market assessment that addresses viability for food and beverage uses that complement these public spaces, identifying the conditions and qualities most conducive to the development of assets that enhance experience and are economically sustainable.

MARKET ANALYSIS

LOCAL CONTEXT

The sites of Jacksonville Shipyards and Riverfront Plaza sit amongst a variety of eclectic neighborhoods filled with local boutiques, and locally beloved restaurants, as well as Jacksonville’s growing Downtown and Southbank regions.

As Jacksonville’s existing neighborhoods have continued to develop and improve in recent years, this opportunity will be most fulfilled through crafting an environment, with a dynamic public realm activation and culinary program that caters to a variety of day parts, as well as Jacksonville’s diverse resident and visitor profile.

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USER ANALYSIS

USER PROFILES



DOWNTOWN WORKFORCE

With a daytime population of over 50,000, the downtown area has a captive audience of lunch-goers, happy-hour seekers, and business dinner patrons.



SURROUNDING NEIGHBORHOODS

Downtown and the surrounding areas continue to grow, as buyers and renters seek the dynamic lifestyle that urban and semi-urban fringe neighborhoods offer.



EVENT ATTENDEES & CORPORATE TRAVELERS

Leisure visitors and corporate travelers flood into the downtown area, particularly on nights and weekends, presently with few options for food and drink.



REGIONAL RESIDENTS

Bringing in their families or celebrating a special occasion, regional residents visit once or twice a year from a bit further than the Downtown Core.

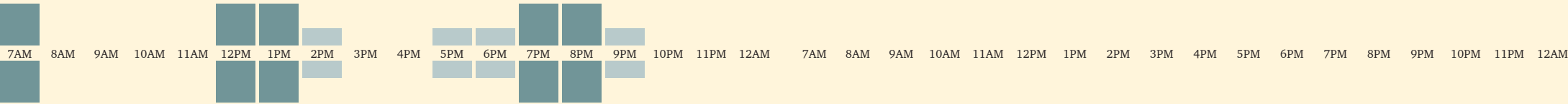
DAYPART JOURNEY

WEEKDAY

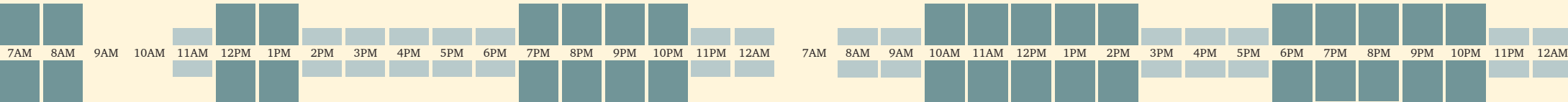
WEEKEND



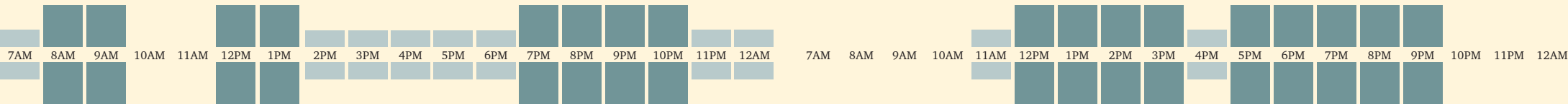
DOWNTOWN WORKFORCE



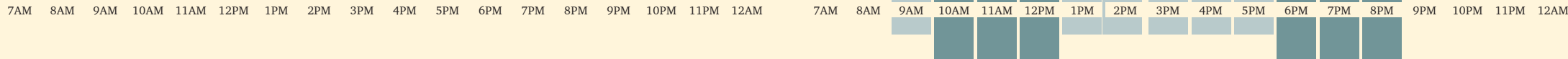
SURROUNDING NEIGHBORHOODS



EVENT ATENDEES & CORPORATE TRAVELERS



REGIONAL RESIDENTS



USER PRIORITIZATION

Identifying all captive user groups is critical to maximizing foot traffic, however, creating an experience that is uniquely appealing to each is equally critical. Without such a strategic approach, alienation of user groups is a significant risk. Using tourist-oriented places as an example, assets designed, merchandised, and marketed to tourists alienate locals, who typically spend more per purchase and are far more reliable as repeat consumers. The most successful assets are ones that appeal to all user groups, almost always because they are a place that locals celebrate, frequent, and talk about. **Tourists follow locals but locals never follow tourists.**

NON-STRATEGIC

Event-goers and Visitors

~~Downtown Workforce~~

~~Neighbors~~

~~Regional Residents~~

STRATEGIC

Neighbors

Regional Residents

Downtown Workforce

Event-goers and Visitors

RIVERFRONT PLAZA

LOCATION — RIVERFRONT PLAZA



RIVERFRONT PLAZA - RESTAURANT

EXPERIENCE BRIEF

RIVERFRONT PLAZA RESTAURANT

LUNCH CAFE | FULL SERVICE DINING | CASUAL BAR | THIRD PLACE

The restaurant at Riverfront Plaza should establish itself as an accessible culinary haven, providing a diverse selection of high-quality offerings, whether for a breakfast croissant before work, a leisurely lunch with clients, or a casual dinner with friends. With service from breakfast to dinner, a diverse array of seating options, and a bright and airy interior, this restaurant will appeal to all users and become a frequent stop for many who expect a quality local offering and familiar service.

TENANT QUALITIES

On-Trend Operators
Multi-Generational Appeal
Social Media Presence

Elevated Quick Serve Lunch Offerings
Strong Branding and Identity
Memorable Customer Service

DESIGN APPROACH

OPEN AND LIGHT

An emphasis on spaciousness and natural light should be promoted through the use of expansive windows, unobstructed views to the water, and an open kitchen, all complimented by memorable lighting. This will cultivate an inviting sense of openness and brightness that is unique to market.

SUCCESS IN FLEXIBILITY

Being able to cater to a variety of user groups will be crucial to success. A variety of table sizes as well as a variety of moveable and unmoveable seating options will allow for the restaurant to flex. Whether brunch with friends, a large corporate dinner, a private room for a family event, or a cocktail after a show at the performing arts center the space should have few limitations.

STRONG BRAND STORY

All day cafes become true mainstays in someone’s daily routine. Having a strong social media presence, as well as storefront and signage presence will be crucial to attracting new users and staying on the radar of locals to generate repeat followings. A great first impression coupled with a memorable aesthetic will drive foot traffic for regulars, and newcomers alike.

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JACKSONVILLE WATERFRONT

DESIGN ANALYSIS – RIVERFRONT PLAZA RESTAURANT

Given that Riverfront Plaza is already under construction, the opening of the restaurant use will occur sometime after, however, its tenanting, construction, and opening should be prioritized to occur as soon after park opening as possible. Doing so will ensure the most positive and memorable of impressions the park has on the Jacksonville region.

SITE CONSIDERATIONS

- Loading/Receiving
- Refrigerated trash room
- Covered/enclosed trash or dumpster for loading

SQUARE FOOTAGES

KITCHEN	2,500 sf
BOH	500 sf
CAFE	1,000 sf
BAR	1,000 sf 70 seats
DINING	1,000 sf 65 seats

TOTAL	6,000 sf 135 seats
PATIO	2,000 sf 135 seats



ECONOMICS — RIVERFRONT PLAZA RESTAURANT

6,000

Total SF

\$10/SF–\$30/SF

Site Work Cost

\$4.5M–\$6M

Sales

\$185/SF–\$225/SF

Base Building Construction Cost

\$35–\$45

Net Rent / SF

Cold Dark Shell

Landlord Delivery Condition

\$10

NNN's / SF

\$175–225

Tenant Improvement / SF

10 years

Lease Term



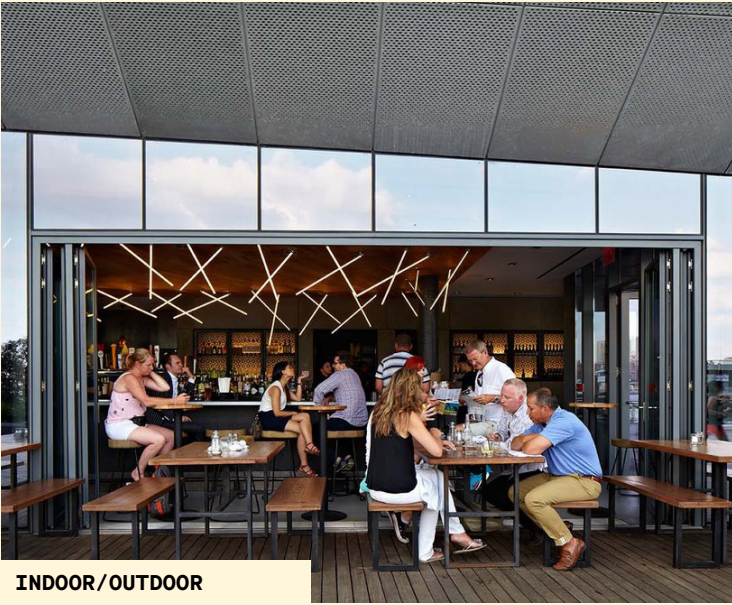
LOOK & FEEL – RIVERFRONT PLAZA RESTAURANT



WELCOMING



GREEN ROOF



INDOOR/OUTDOOR



DAY TO NIGHT APPEAL



VISUALLY STRIKING

HOURS OF OPERATION – RIVERFRONT PLAZA RESTAURANT

Weekday hours are targeted to downtown area residents and workers for their second cup of coffee, lunches, post-work happy hours and after work dinners. Consistency in opening hours will help draw in that crowd throughout the week and afford the restaurant the ability to capture corporate travelers and capitalize on visitors in town on the weekends.

M	T	W	T	F	S	S
9AM–10PM	9AM–10PM	9AM–10PM	9AM–10PM	9AM–11PM	9AM–11PM	9AM–10PM

OFFICINA

WASHINGTON, DC

DEVELOPER Madison Marquette
OPERATOR Nicholas Stefanelli
YEAR BUILT 2018
SIZE 14,000 square feet

Spanning three levels of space, each with its own distinct offering, Officina has managed to distinguish itself in DC's most F&B-competitive neighborhood. Throughout the day patrons of Officina will find options ranging from fresh baked pastries and espresso in the morning to pizza by the slice at lunch and handmade pastas in the evening. Coupled with its expansive daypart appeal, Officina has a trendy yet approachable environment yields a multi-generational appeal, whether a local or a visitor.

WHAT WE LIKE | LEARNED LESSONS

- Sit-down, quick-serve, grab-and-go, market, and special event components
- Textured interior and exterior spaces, utilizing contemporary, yet warm, materials and plants
- Rooftop space overlooking the river and skyline
- Tiered price point offering

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JACKSONVILLE WATERFRONT

AMERICAN MILLIONS SITE- INTERIM ACTIVATIONS



CONCEPT 1 / ST. JOHN'S SOCIAL CLUB

Outdoor Nostalgia /
Everyday Getaway /
Park Provisions

St. John’s Social Club blends a family-friendly atmosphere with waterfront charm. A flexible common area anchors the experience, where visitors can relax in Adirondack chairs overlooking picturesque river views, or gather around fire pits for cozy conversations, evoking the spirit of a waterside getaway. This multifaceted space also features a dog park and sand pit, catering to both pets and young adventurers.

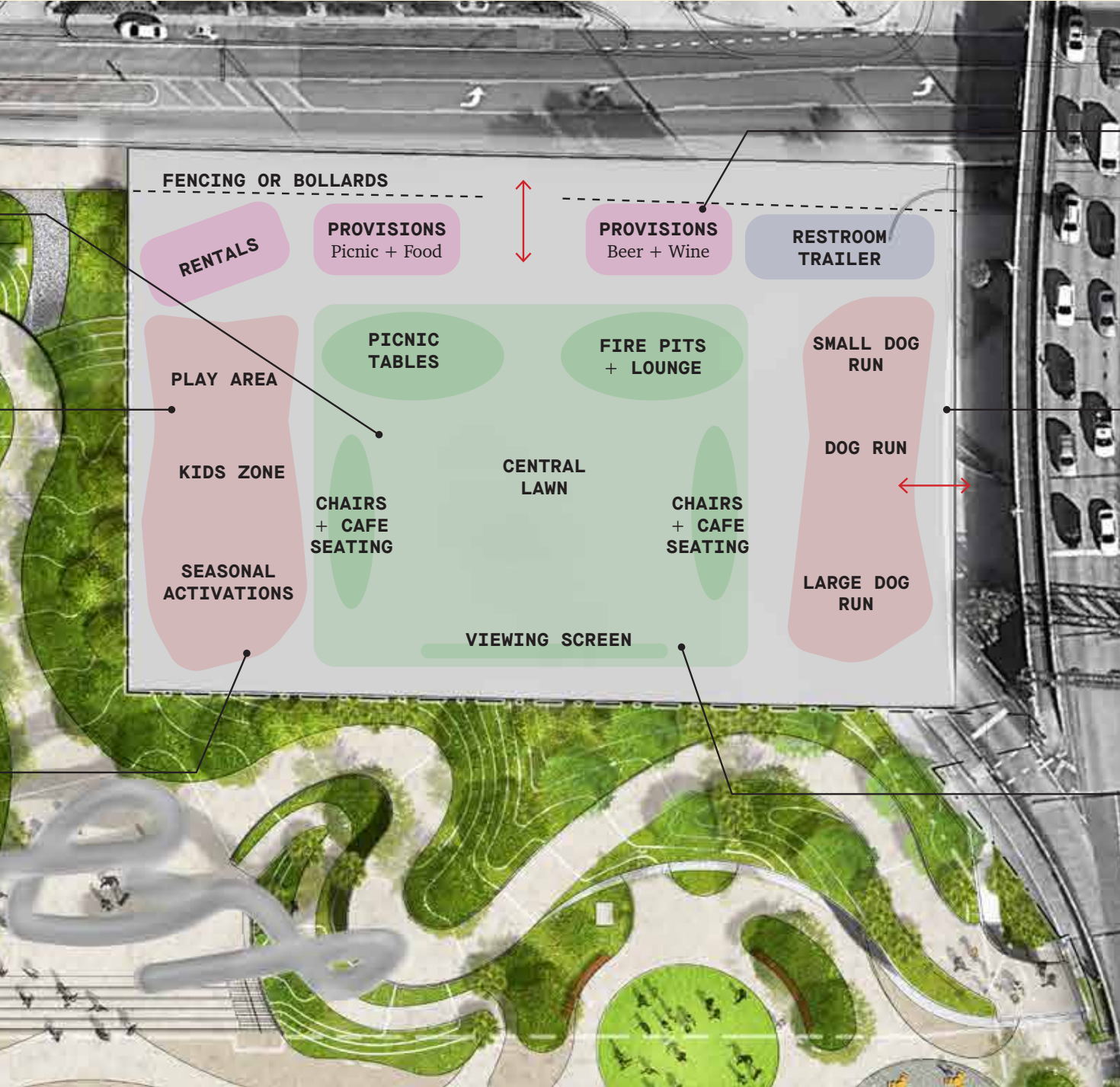
A retrofitted Airstream complements the relaxed energy, offering an array of treats and essentials that cater to a leisurely day by the river, from gourmet dog snacks to wine and cheese. It also stocks items like s'mores kits and lemonade, alongside branded blankets and coolers, perfect for a comfortable and stylish riverside experience. St. John’s Social Club unites urban convenience with a timeless sense of leisure, capturing Jacksonville's riverfront essence and fostering shared moments in a vibrant setting.

While the site will ultimately be developed, the snacks, kits, and picnic accouterments (rental or for purchase) could be incorporated into the overall park’s permanent offering, depending on community responsiveness to the products.

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CONCEPT 1 / ST. JOHN'S SOCIAL CLUBS / SPACE PLAN



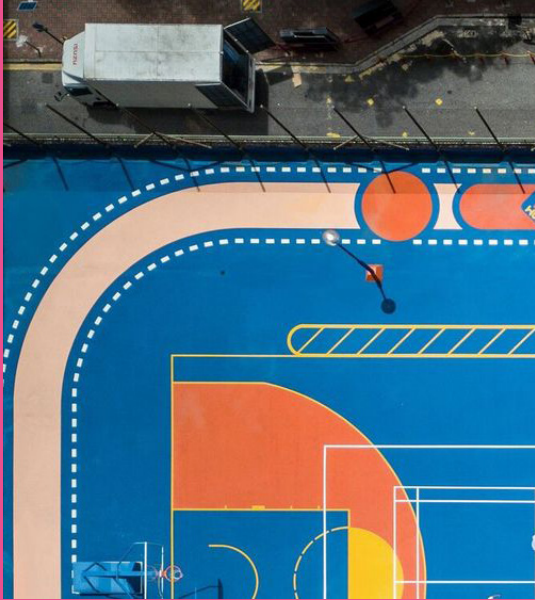


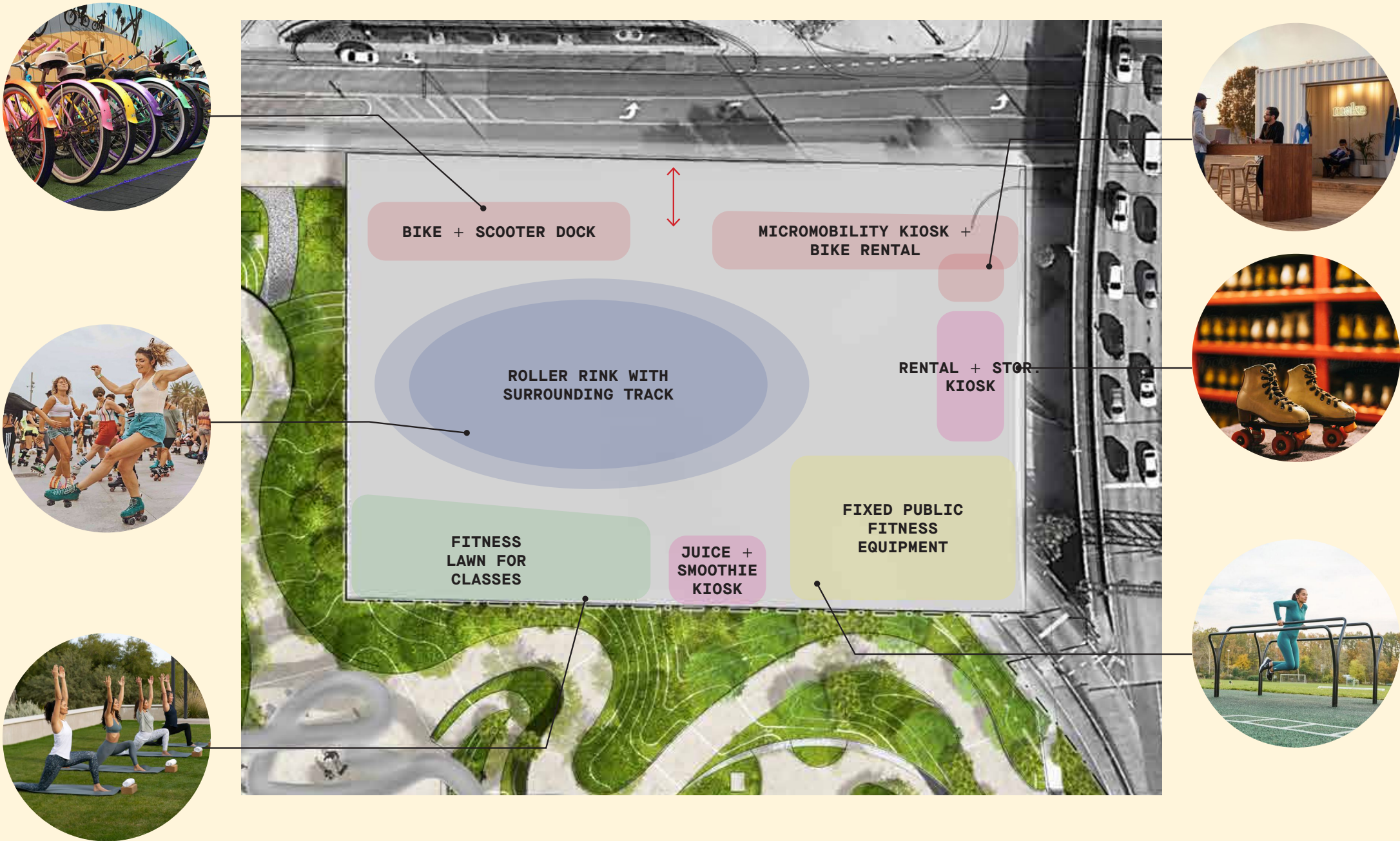
JAXX ACTIVE

Riverfront Roller Rink /
Healthy Lifestyle /
Urban Mobility

A lively hub along Jacksonville’s riverfront blending wellness with scenic views, JAX Active features an outdoor roller rink and workout space. This energetic destination is versatile, doubling as a venue for roller derbies, basketball, and hockey. Adjacent to the neon-painted rink is a thoughtfully designed exercise area, hosting yoga and fitness classes.

Through brand partnerships and a dedicated skate rental and fitness equipment kiosk, visitors have the freedom to explore the riverfront on bikes, scooters, and skates. Complementing this buzzy activity, the Juice & Smoothie Kiosk offers a refreshing selection of health-focused treats, from smoothies and matcha soft serve to nourishing energy bars. Jax Active stands as a spirited nexus of fun and amusement, health, and community engagement with a youthful urban aesthetic.







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RIVER STUDIOWORKS

CONCEPT 3 / RIVER STUDIOWORKS

Community Garden /
Artisan Workshops /
Jacksonville Front Porch

River Studioworks is a distinctive destination on Jacksonville’s riverfront, where artistry and commerce come together. The heart of this space is a series of creatively repurposed shipping containers, each serving as a hybrid workshop and retail storefront for local artisans. Thoughtful design might also allow the artisan production process to be put on display. These vibrant studios offer affordable space to support artisans, one-of-a-kind shopping experience and contribute significantly to the waterfront’s identity, reflecting the city’s rich creative spirit.

The integrated garden space at River Studioworks is both an artistic sanctuary and a celebration of local ecology, seamlessly blending sculptures with diverse flora and fauna. This area offers visitors a tranquil yet engaging experience, surrounded by the natural beauty of the region. The lively market pavilion, featuring space for food trucks, enhances the community atmosphere. Alongside city-sponsored initiatives like a library kiosk and local souvenir offerings, River Studioworks provides a calm yet dynamic riverside venue for locals and visitors to explore and enjoy.

STREETSENSE







SHIPYARDS

WEST



SHIPYARDS

WEST - BEER

GARDEN

EXPERIENCE BRIEF

SHIPYARDS WEST BEER GARDEN

HAPPY HOUR | GAME DAY | SPECIAL EVENTS

The Shipyards West beer garden will become a regional go-to for casual hang-outs. Whether a corporate happy hour, all day/night playoff binging, date night, or lunch after a family outing at the park, the beer garden is fun, yet welcoming; casual, yet clean. A fun beverage program, rotating food selection, backyard games, live music, and tv’s galore, the offering and the ambiance make the beer garden at Shipyards West a place for everyone.

TENANT QUALITIES

- Distinct Brand Identity

Flexible Operating Partner

Multi-Generational Appeal
- Slow Growth Of Events

Entertainment Offerings

Community Backyard Feel

DESIGN APPROACH

YOUR FAVORITE BACKYARD

Beer gardens of today find much of their success in being playful, yet still approachable to a variety of users, much like your dream backyard. By focusing on a design that blends into the natural landscape, specifically with regard to waterfront proximity and a mix of nearby free park and game activities.

EVENTS FOR ALL

Beer gardens are fun but variety and spontaneity are critical to continued relevance. A stream of regular and one-time events will keep consumers engaged and turn infrequent guests into loyal followers.

ACCESSIBLE TO ALL AGES

While beer gardens may not always be thought of as an idle place for kids, many of the more successful ones have been able to drive foot traffic through family friendly offerings and design. Beer gardens are typically large enough spaces to accommodate children without becoming playgrounds.

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SHIPYARDS WEST BEER GARDEN, JACKSONVILLE WATERFRONT

DESIGN ANALYSIS - SHIPYARDS WEST BEER GARDEN (TEMPORARY CREEKSIDE SCENARIO)

An interim beer garden at the Creekside pad will be involve minimal capital and development time, allowing the use to amenitize the newly built park immediately, when the park opens and serve this function until the surrounding neighborhood matures and can support more permanent, capital-intensive uses.

SITE CONSIDERATIONS

- Loading/Receiving
- Refridgerated trash room
- Access for deliveries
- Access to temporary restrooms

SQUARE FOOTAGES

TOTAL	6,000+ SF
CAPACITY	approx. 300



ECONOMIC ANALYSIS – SHIPYARDS WEST BEER GARDEN (TEMPORARY CREEKSIDE SCENARIO)

6,000
Total SF

\$2.5M–\$4M
Sales

\$250K–\$400K
(10% Of Sales)
Gross Rent

\$20/SF–\$40/SF
Site Work Cost

As-Is
Tenant Improvement Allowance

2-yr +
1-yr Options
Lease Term

Pad +
Utilities
Landlord Delivery Condition



DESIGN ANALYSIS – SHIPYARDS WEST BEER GARDEN (PERMANENT PARKING GARAGE ROOF SCENARIO)

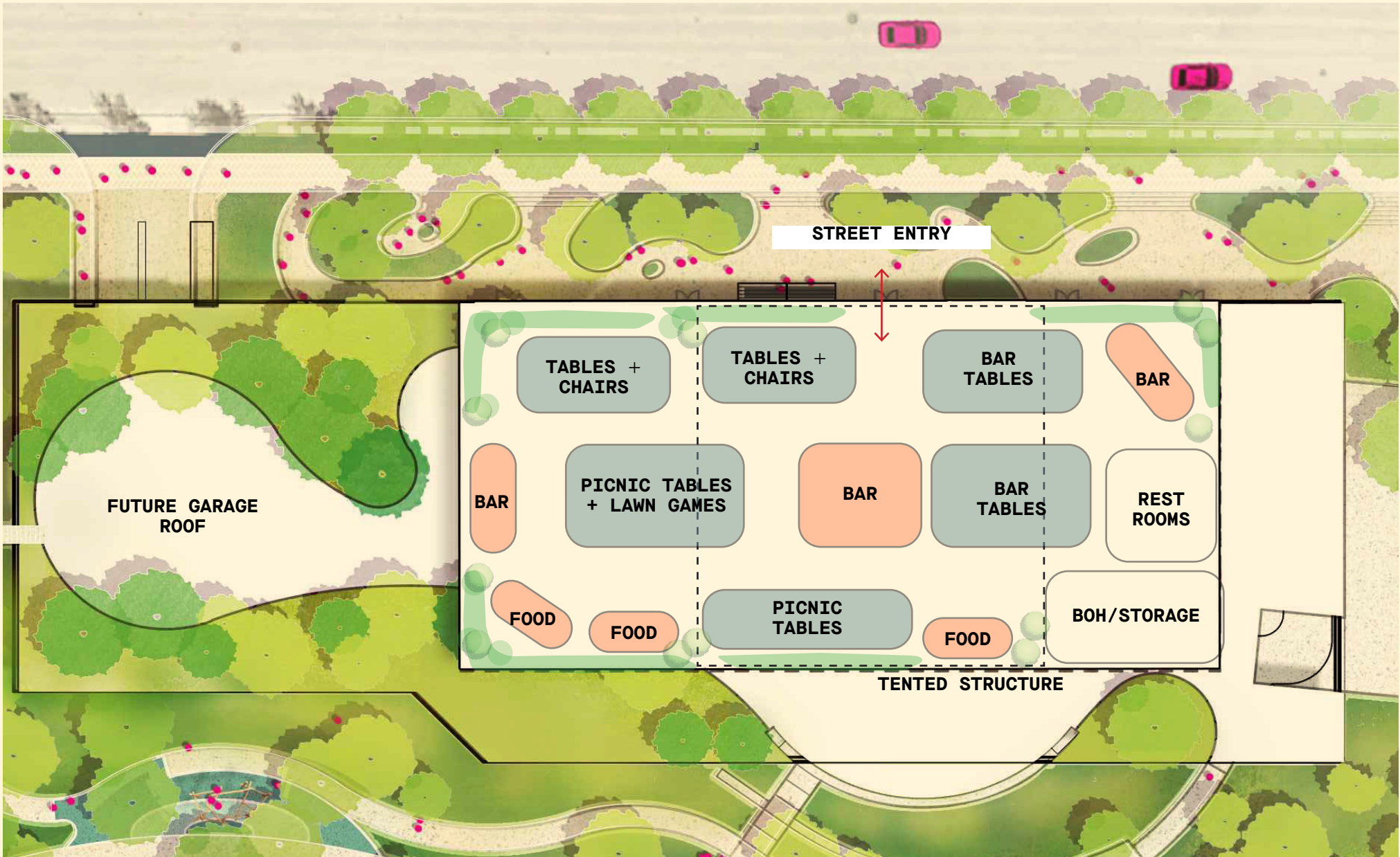
An alternative to the Creekside pad location, in the event a food hall is deemed infeasible, a permanent beer garden should be considered for the parking garage use. This would avoid building a beer garden twice and would allow for long-term planning that ultimately includes a permanent restaurant at the pad location. While a beer garden lacks the climate controlled comforts of a food hall, the quick-serve, casual nature of such a use would serve a similar customer base and (with exception of morning hours) provide similar daypart fulfillment.

SITE CONSIDERATIONS

- Access for deliveries
- Semi-permanent structures
- MEP requirements
- Trash + loading
- Temporary Restrooms
- Storage

SQUARE FOOTAGES

TOTAL	20,000+ SF
CAPACITY	approx. 600



DESIGN ANALYSIS – SHIPYARDS WEST BEER GARDEN (PERMANENT PARKING GARAGE ROOF SCENARIO)

In the event that a food hall is not pursued but a Creekside restaurant is, a relocated and expanded beer garden is an alternative that should be explored further.

20,000

Total SF

\$5M–\$7M

Sales

\$500K–\$700K

(10% Of Sales)

Gross Rent

\$30/SF–\$50/SF

Site Work Cost

Cold Dark Shell

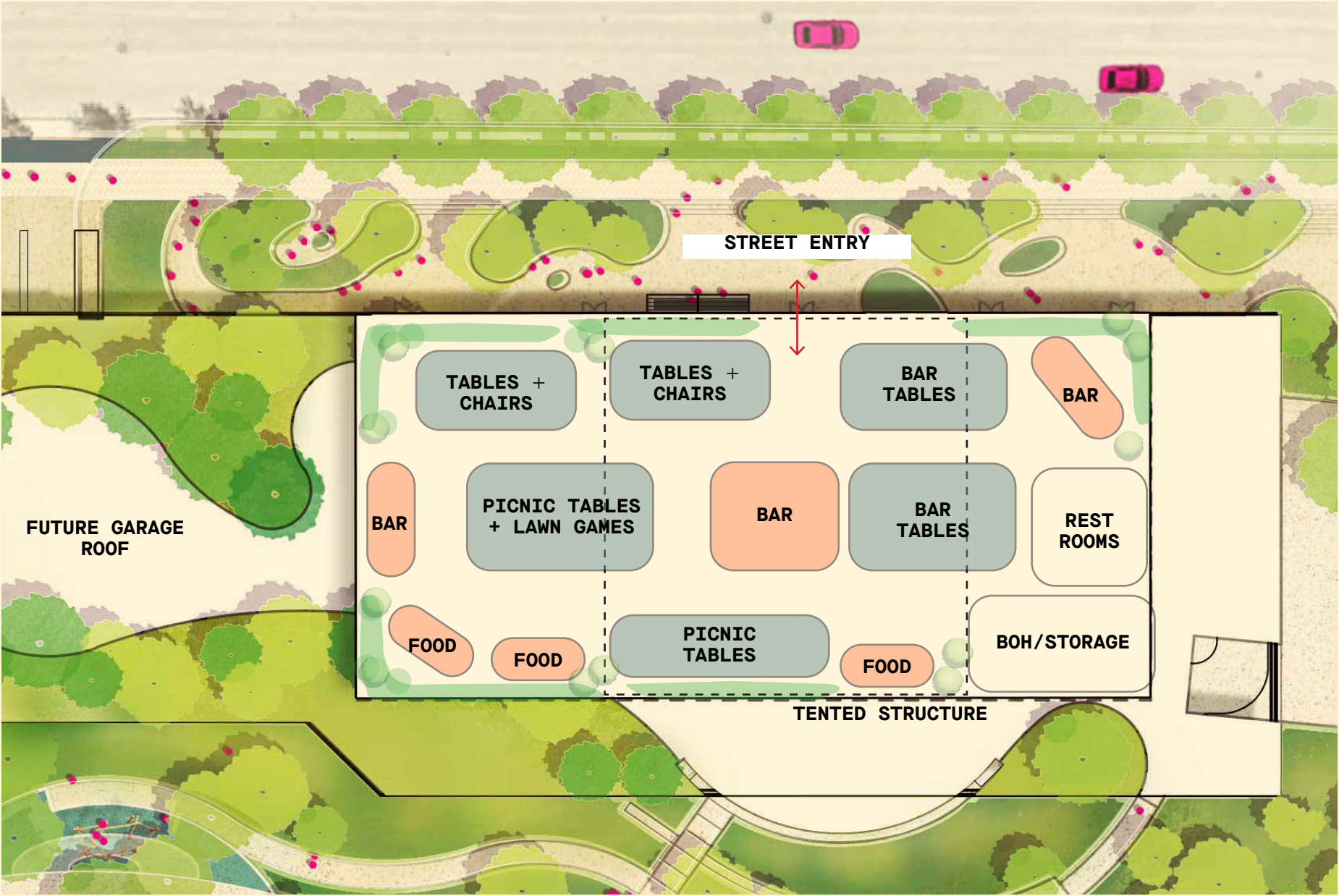
Landlord Delivery Condition

\$50-\$70

Tenant Improvement Allowance

10 Years

Lease Term



LOOK & FEEL – SHIPYARDS WEST BEER GARDEN



FOOD TRUCK



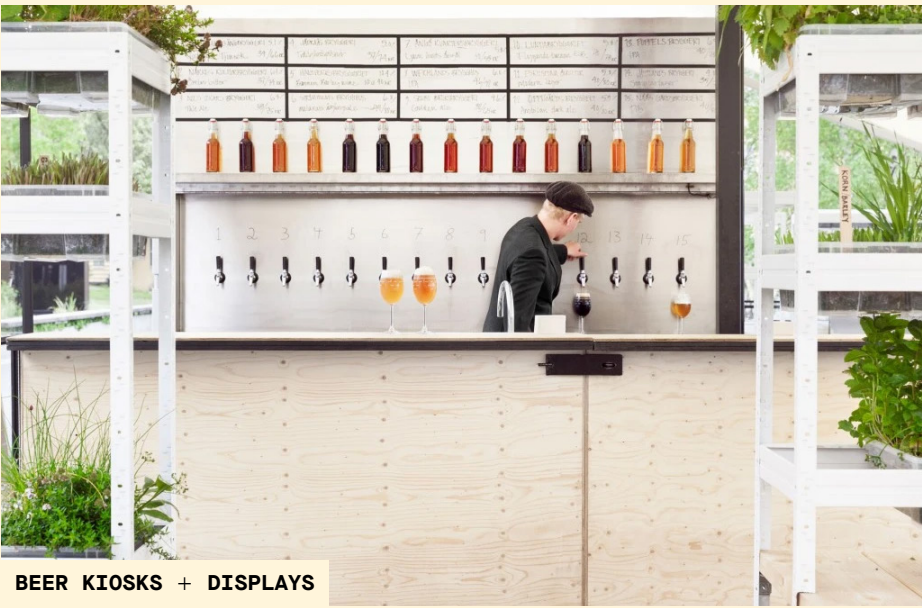
TEMPORARY KIOSK



VARIED SEATING



FLEXIBLE SEATING TYPOLOGIES



BEER KIOSKS + DISPLAYS



LAYERED INTO LANDSCAPE

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JACKSONVILLE WATERFRONT

HOURS OF OPERATION – SHIPYARDS WEST BEER GARDEN

Consistent beer garden hours should be maintained to ensure a reliable accountability with the consumer, balancing realistically captive foot traffic while addressing the unique needs of what will be a diverse array of user groups, including area residents, regional residents, and a broad and equally diverse spectrum of visitor typologies ranging from business visitors, to tourists, to “gameday” foot traffic.

M	T	W	T	F	S	S
4PM–10PM	4PM–10PM	4PM–10PM	4PM–10PM	3PM–12AM	11AM–12AM	11AM–11PM

KIRBY ICE HOUSE

HOUSTON, TX

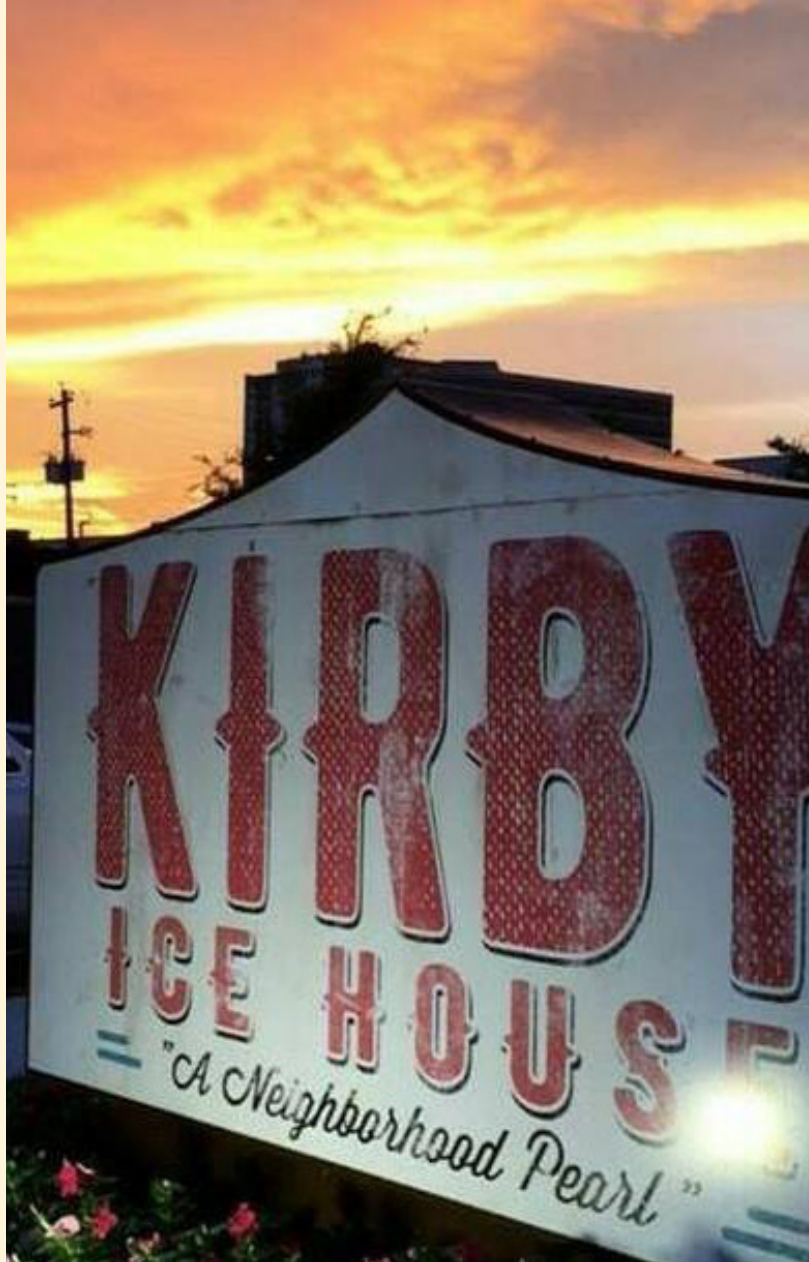
DEVELOPER	Morgan Family Holdings		
OPERATOR	Russ Morgan		
YEAR BUILT	2016		
SIZE	6,500 SF (interior)	36,500 SF (exterior)	
F&B	1 bar 1 rotating food truck		

Kirby Ice House's first location was conceived as a temporary use to tide over the property owner until demand for a residential development was viable. When it opened the doors in 2016 it quickly become one of the most talked about bars in all of Texas. With 50 beers on tap and a collection of rotating visiting food trucks, Kirby Ice House has helped to grow and solidify the craft beer and foodie culture that continues to grow in Houston. Described as "Houston to the Bone," Kirby Ice House's interiors boast an intentional weathered and well-loved aesthetic. Paired with its community backyard exterior, it has accomplished the rare feat of creating a space that is large enough to host Houston's largest and favorite community events, yet feels intimate enough for a first date.

WHAT WE LIKE | LEARNED LESSONS

- Flexible space that is easily programmable for a variety of event types
- Focus on local beer, creating a true beverage destination
- Rotating food trucks add food component in lieu of high development cost
- Highly textured interior and exterior spaces
- Bold brand expression

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JACKSONVILLE WATERFRONT

THE WHARF

FT. LAUDERDALE, FL

DEVELOPER	Merrimac Ventures, Barreto Hospitality
OPERATOR	Breakwater Hospitality Group
YEAR BUILT	2019
SIZE	54,000 SF (all exterior)
F&B	4 bars 5 food stalls

Following the success of the original location in Miami (recently closed for future development), the Wharf in Fort Lauderdale has been a transformative addition to the local entertainment scene. With roughly an acre of space, the Wharf boasts a large outdoor component that feels like an elevated backyard, with resort-like themes. A combination of sheltered and daylit outdoor spaces, the venue is comfortable regardless of the unpredictable Florida weather. The approachable community atmosphere, coupled with a roster of exciting events and a desirable location have made the Wharf one of those unique destinations that is appealing to locals and visitors alike.

WHAT WE LIKE | LEARNED LESSONS

- Resort-like aesthetic
- Textured and dynamic public realm
- Partnerships with local chefs, and alcohol producers
- Indoor/outdoor options to protect from the elements
- Robust calendar of events



SANDLOT

BALTIMORE, MD

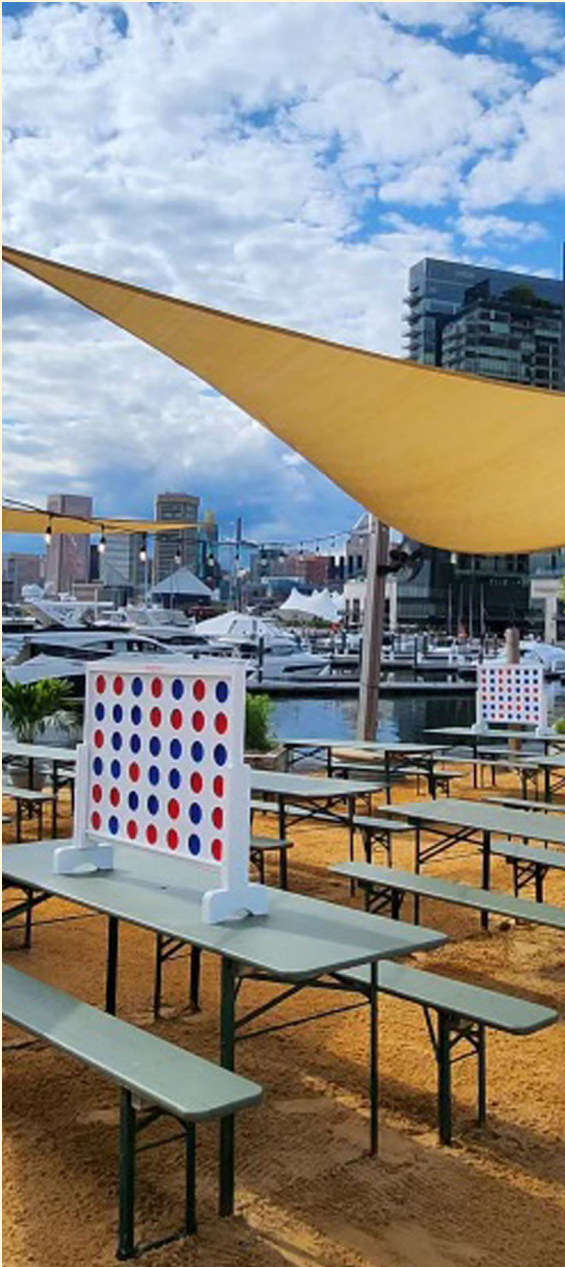
DEVELOPER	Beatty Development
OPERATOR	Spike Gjerde
YEAR BUILT	2017
SIZE	30,000 SF (all exterior)
F&B	1 bar 1 rotating food truck

A temporary use to drive site awareness to a long-term, multi-phase development project, Beatty Development and local James Beard award-winning chef Spike Gjerde set out to create a one-of-a-kind entertainment destination on Baltimore’s waterfront. Recently closed to make way for development, the Sandlot became a beloved seasonal hotspot for Baltimore visitors and residents alike, bringing a beach-like atmosphere to the urban Inner Harbor. Details such as summer holiday celebrations, larger-than-life lawn games, and unparalleled views of downtown allowed an otherwise unused lot to become a favorite gathering destination and brand-builder for Beatty’s Harbor Point.

WHAT WE LIKE | LEARNED LESSONS

- Casual Mid-Atlantic-style beach and beach aesthetic
- Constant rotation of activations, from events, to food trucks, to guest chef appearances
- Open space allows for flexibility in programming
- Open for public and private events
- Casual beach relationship with waterfront, without feeling over-programmed

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JACKSONVILLE WATERFRONT

SHIPPYARDS

WEST -

RESTAURANT

EXPERIENCE BRIEF

SHIPYARDS WEST RESTAURANT

FULL SERVICE DINING | BAR | INTIMATE EVENTS

The Creekside restaurant at Shipyards West will provide an elevated culinary destination from weekday date night, weekend family outings and a bite to eat for game day patrons looking for something a little less casual before the big game

TENANT QUALITIES

Local/Regional	Elevated Culinary Palette
High-Quality Operator	Elegant But Approachable
Chef Driven	High Calibre Bar Execution

DESIGN APPROACH

INDOOR / OUTDOOR DINING

Through the incorporation of operable windows, a dynamic patio area shielded from the elements, and an overarching biophilic design concept, the restaurant is uniquely positioned to be an upscale, yet unpretentious indoor-outdoor dining experience, unlike anything that exists in the regional landscape.

MULTIFACETED SPACE

The restaurant’s success will hinge on its ability to accommodate a wide range of customer needs. Prioritizing the provision of quality offerings from happy hours, to corporate dinners, while maintaining a family friendly dining environment without compromising on quality ambiance, will be central to its success.

ELEVATED AMBIANCE

Establishing an ambiance that mirrors the quality of its culinary offerings will be paramount to distinction within the market. By artfully incorporating playful yet sophisticated nautical design elements, deliberate biophilic design choices, a captivating brand identity, and enduring yet refined interior aesthetics, the restaurant will compliment the park while setting itself apart from its competitors.

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DESIGN ANALYSIS – SHIPYARDS WEST RESTAURANT

Once the surrounding location has matured, a permanent restaurant on the Creekside pad will serve as the perfect compliment to the park and anchor to the myriad of uses that will collectively make it Shipyards West so dynamic. An interim use, such as a beer garden, should be built to last as long as it takes for surrounding development and public infrastructure improvements to be completed. This time period is somewhat unpredictable and will require a degree of flexibility, which beer gardens (if built properly) inherently offer.

SITE CONSIDERATIONS

- Loading/Receiving
- Refridgerated trash room
- Access for deliveries

SQUARE FOOTAGES

KITCHEN	1,400 sf
BOH/ENTRY	460 sf
BAR	1,400 sf 70 seats
DINING	800 sf 45 seat
OUTDOOR	1,000 sf 65 seats
<hr/>	
TOTAL	5,060 sf 180 seats



5,060

Total SF

Cold Dark Shell

Landlord Delivery Condition

\$5M–\$6M

Sales

\$30/SF-\$50/SF

Site Work Cost

\$44–\$56

Net Rent / SF

\$185/SF-\$225/SF

Base Building Construction Cost

\$10

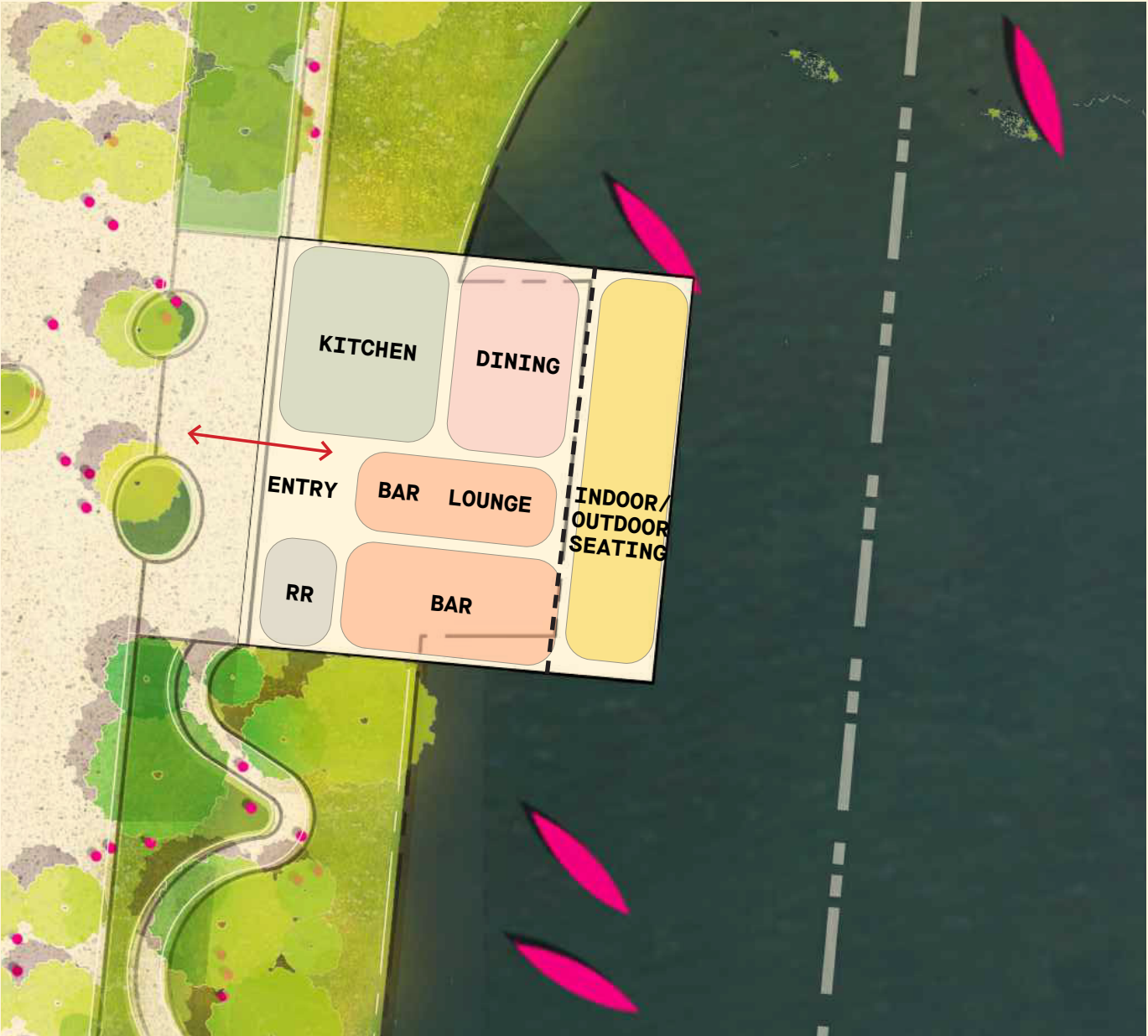
NNN's / SF

\$175–\$225

Tenant Improvement / SF

10 years

Lease Term



LOOK & FEEL – SHIPYARDS WEST RESTAURANT



WATERSIDE EXPERIENCE



LIVELY BAR



NAUTICAL NODS



COVERED PATIO



NATURAL LIGHT + VIEWS



INDOOR OUTDOOR ACCESS

STREETSENSE

JACKSONVILLE WATERFRONT

HOURS OF OPERATION – SHIPYARDS WEST RESTAURANT

Weekday hours are targeted to capture downtown area residents, post-work happy hours and corporate travelers in nearby hotels. Hours should be maximized on weekends to accommodate downtown area and regional residents, gameday foot traffic, and leisure visitors. **While the restaurant should start as a dinner only destination, it should have the capacity to expand to serve brunch on the weekends and may ultimately transition to lunch service, depending on how the surrounding neighborhood matures.**

M	T	W	T	F	S	S
CLOSED	4PM–10PM	4PM–10PM	4PM–10PM	3PM–11PM	11AM–11PM	11AM–10PM

KLYDE WARREN PARK

DALLAS, TX

DEVELOPER Woodall Rodgers Park Foundation
OPERATOR M Crowd Restaurant Group
BUILT 2012
SIZE 11,000 SF

A jewel box in the heart of internationally acclaimed Klyde Warren park, Dallas favorite Mi Cocina took over the restaurant space in 2021. The upscale casual Tex-Mex concept offers an array of menu offerings, from authentic Mexican cuisine to classic American adaptations. The menu and design make the restaurant equally appealing to parents and children, made even more family friendly by the restaurant's relationship to the park and children's play area. This allows parents to linger at the restaurant while the kids play within full view.



WHAT WE LIKE | LEARNED LESSONS

- Combination of authentic Mexican and Tex-Mex offerings
- Elevated, yet approachable price point and atmosphere
- Seamless relationship between restaurant and children's play
- Strong local brand identity
- Experienced, well-capitalized operator



STREETSENSE

JACKSONVILLE WATERFRONT

SHIPYARDS

WEST -

FOOD HALL

EXPERIENCE BRIEF

SHIPYARDS WEST FOOD HALL

CAFE | LIMITED-SERVICE DINING | BAR | HYBRID HANGOUT

From coffee in the morning, to salads and lunch, and cocktails and bites after work, the food hall at Jacksonville Shipyards will create a local and regional chef-driven, all-day culinary destination for locals and visitors alike—a first of its kind in Jacksonville.

TENANT QUALITIES

- Local/Regional
- High-Quality Operators
- Wide Daypart Appeal
- Multi-Generational Appeal

- Global Culinary Palette Approach
- Current with Relevant Food Trends

DESIGN APPROACH

PUBLIC REALM SYNERGY

Careful consideration must be made as to the orientation of the food hall and its ability respond to both the waterfront and the park. Consider opportunities to blur edges between the built environment and the park landscape, leveraging operable storefront for the creation of bold indoor/outdoor spaces.

MULTI-FACETED | MULTI-PURPOSE

The food hall boasts a tremendous opportunity to serve as an iconic community gathering space. Built interior and exterior spaces for flexibility, however, balance the delicate line between flexibility and feeling temporary.

RICH IN PERSONALITY

With a site as iconic to Jacksonville’s history as the shipyards, developing a bold brand strategy to tell the story will give the food hall depth. Ensure that the brand is thoughtfully considered in architectural design and intentionally reflected in all messaging, including in wayfinding.

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RECOMMENDED MERCHANDISING MIX – SHIPYARDS WEST FOOD HALL

SPACE #	USE	TOTAL GLA	PRIMARY USE	SECONDARY USE
1	Sushi/Asian Market	400	Sushi, poke, dim sum, ramen	Prepared food, sauces and supplies
2	Chicken	800	Fried chicken, BBQ, slaws	
3	Healthy Eats	400	Salads, smoothies, juice	Prepared dishes, grab-and-go, dried fruit, nuts, supplements
4	Tacos/Burritos	800	Tacos, burritos, salsas	Margaritas, taco shells, packaged salas and spreads
5	Italian Specialty Market	800	Pizza, pasta, sandwiches	Dried pasta, deli meat and cheese
6	Butcher/Burgers	800	Burgers, hot dogs, fries, shakes	Butchered meat and poultry
7	Market	1,000	Prepared foods, a la carte takeaway, pantry goods	Dried pasta, deli meat and cheese, flowers, plants
8	Bakery/Café	1,000	Coffee, baked goods, sandwiches, soup	Bread
9	Bar	1,000	Beer, wine, cocktails	
TOTAL		7,000 SF		

DESIGN ANALYSIS - SHIPYARDS WEST FOOD HALL

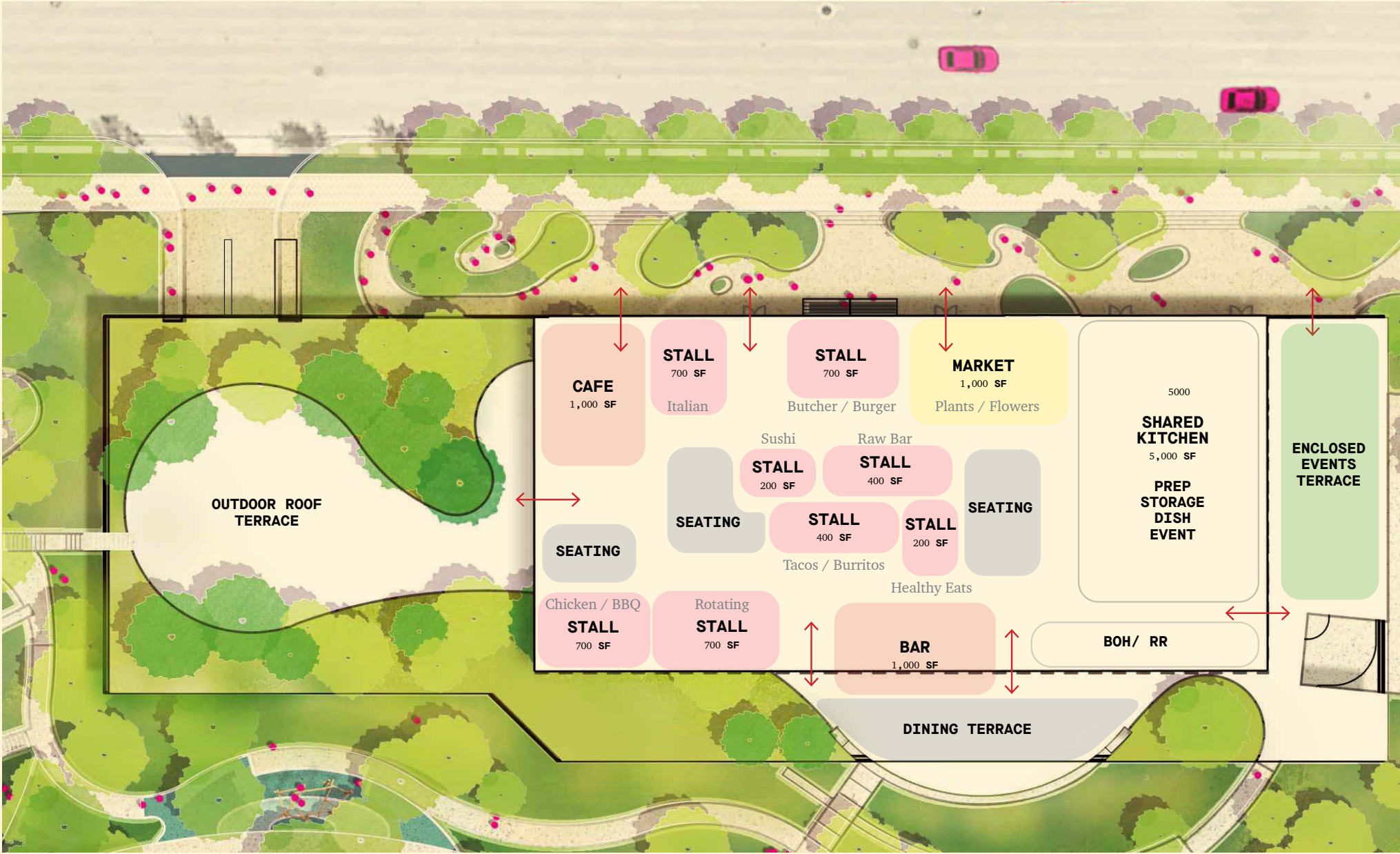
A food hall at Shipyards West should only be considered for when the surrounding neighborhood has matured and area public infrastructure has been completed. Premature opening, whereby consumers are turned off by cumbersome and unsightly construction will only yield poor first impressions and a sense of inconvenience

SITE CONSIDERATIONS

- Loading/Receiving
- Freight elevator access from garage to kitchen
- Access for deliveries
- Enclose events terrace to all-year use

SQUARE FOOTAGES

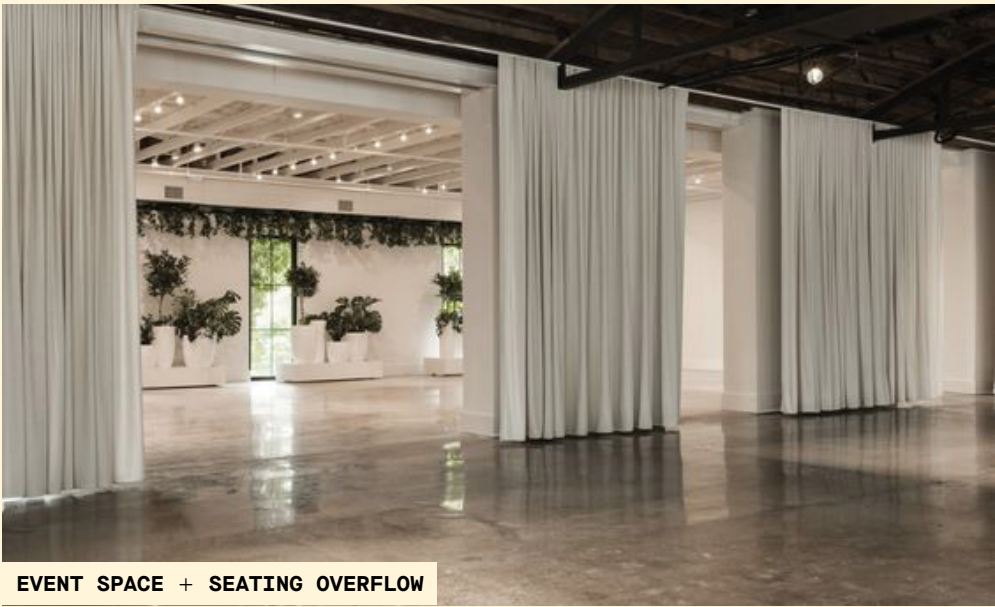
INDOOR	
KITCHEN	5,000 SF
STALLS	7,000 SF
CIRCULATION	2,000 SF (10%)
SEATING	4,900 SF
BOH	1,500 SF
TOTAL INDOOR	
CAPACITY	20,400 sf approx. 400 SEATS
OUTDOOR	
EVENTS	2,500 SF 166 SEATS
DINING TERRACE	2,000 SF 115 SEATS



LOOK & FEEL - SHIPYARDS WEST FOOD HALL



FOOD + MARKET VENDORS



EVENT SPACE + SEATING OVERFLOW



SPECIALTY VENDORS



LOW PARTITIONS + COZY SEATING



INDOOR/OUTDOOR SPACES



CENTRAL BAR

STREETSENSE

JACKSONVILLE WATERFRONT

HOURS OF OPERATION – SHIPYARDS WEST FOOD HALL

The Food Hall should be open consistently morning through evening to capture the morning coffee crowd, the workforce lunch rush, and happy hour and quick dinners during the weekdays. The weekends hold the potential for a larger all-day crowd and hours should extend deeper into the evening for greater bar business capture. Not all stalls need to be open the entire day and priority should be placed on the right tenant mix to ensure enough user draw for each daypart.

M	T	W	T	F	S	S
11AM–8PM	11AM–8PM	11AM–8PM	11AM–9PM	11AM–10PM	11AM–10PM	11AM–9PM

**Exterior cafe serving breakfast fare to open at 7 am*

ARMATURE WORKS

TAMPA, FLORIDA

DEVELOPER	SoHo Capital
BUILT	2019 (adaptive reuse)
SIZE	73,000 sf
FOOD HALL	22,000 SF 16 tenants
RESTAURANTS	20,000 SF 3 tenants
EVENTS	800-seat banquet 200-seat event space
CO-WORKING	12,000 SF

Located in the up-and-coming Heights district in Tampa, Armature Works serves as a northstar for the 50-acre district redevelopment's eclectic, creative and highly sought after ambiance. A hyper-local roster of F&B purveyors serves as a showcase and foundation for the growing foodie scene in Tampa, while unique amenities such as the in-house private members' club expands the potential of Armature Works beyond traditional dayparts. The interior of Armature works has been thoughtfully restored, while still keeping its original industrial theme. The interior is intentionally open and flexible, allowing the project to "breathe" to accommodate a variety of events. The roof deck environment provides sweeping water and skyline views. Beyond the walls of the historic warehouse, a waterfront outdoor plaza serves as a unique programming and events space.

WHAT WE LIKE | LEARNED LESSONS

- Open interior allows for flexibility in seating and programming
- Private members' club expands week and daypart activation
- Thoughtful synergy with the waterfront
- Seamless indoor/outdoor connectivity
- Family friendly outdoor area
- Abundance of event space

STREETSENSE



JACKSONVILLE WATERFRONT

OPTIMIST HALL

CHARLOTTE, NORTH CAROLINA

DEVELOPER	White Point Properties, Paces Properties
BUILT	2019
SIZE	57,000 sf
F&B	20 tenants
RETAIL	5 tenants
EVENTS	83,000 SF

A sprawling 1800’s textile mill, Optimist Hall was redeveloped as a mixed-use hub of creativity within Charlotte’s trendy South End neighborhood. The interior and exterior spaces boast a variety of seating options, creating an environment that is awash in a diversity of micro environments. Pockets of outdoor space surrounding the building, and flexible interior space yield endless opportunities for programming, making this destination a true gem for visitors and locals alike. A diverse food and beverage offering featuring local chefs affirms Optimist Hall’s day one mission of being authentically Charlotte while bringing flavors from around the world to the city’s ever-growing culture.

WHAT WE LIKE | LEARNED LESSONS

- Highly textured interior that pays homage to its origin
- Global food palate that caters to a variety of day parts
- Rich diversity of uses, yielding a dynamic experience with all-day foot traffic
- Diverse events calendar that caters to all user groups
- Flexible outdoor seating and highly programmable space

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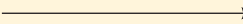
JACKSONVILLE WATERFRONT

RECOMMENDED PHASING

TIMELINE SUMMARY


RIVERSIDE PLAZA


Phase 1a: Park Opening | Cafe | Interim Use Opening

Phase 1b:  Full Service Restaurant Opening

SHIPYARDS WEST (WITH FOOD HALL)


Phase 1: Park Opening | Beer Garden Opening (Creekside Pad)

Phase 2:  Food hall Opening | Beer Garden Closing

Phase 3:  Full Service Restaurant Opening (Creekside Pad)

SHIPYARDS WEST (WITHOUT FOOD HALL)

Phase 1: Park Opening | Beer Garden Opening (Garage Roof)

Phase 2:  Full Service Restaurant Opening (Creekside Pad)

PHASING / RIVERFRONT PLAZA

While unlikely the timing of the Riverfront Park restaurant will coincide with the opening of the park, its pursuit should commence immediately, to ensure an opening as close to park opening as possible. Doing so will maximize the park’s utility and impression it makes on the general public. At minimum, upon opening of the park, construction should be nearly ready to commence, with bold construction fencing in place to promote the park’s signature piece on the horizon.

		YEAR 1				YEAR 2				YEAR 3			
RIVERFRONT: RESTAURANT	DURATION	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
BASE BUILDING: DESIGN/PERMITTING	4 MONTHS												
RIVERFRONT PLAZA OPENING	1 MONTH												
BASE BUILDING: CONSTRUCTION	6 MONTHS												
MARKETING: COLLATERAL MATERIAL PREP/GO-TO-MARKET	1 MONTH												
NEGOTIATION: LOI	3 MONTHS												
NEGOTIATION: LEASE	6 MONTHS												
TENANT: DESIGN	3 MONTHS												
TENANT: PERMITTING	3 MONTHS												
TENANT: CONSTRUCTION	9 MONTHS												

By leveraging a low upfront capital expenditure project, DIA can create a preliminary destination in the form of a beer garden to build an audience, develop credibility, and gain the trust of the surrounding area, all before committing to infrastructure-heavy projects. Ultimately, the location of the beer garden will be dictated by whether or not a food hall is pursued. Under any scenario, the beer garden should be prioritized to open on or near the opening date of the Shipyards West park, to amenitize on day 1 and set a memorable tone.

If the food hall is pursued, the beer garden should be treated as an interim use, offering quick-serve food & beverage, at the Creekside pad. The beer garden would then close at the time of opening of the food hall, which would be located atop the Shipyards parking garage. If a food hall is not pursued, a permanent beer garden should be prioritized for the parking garage roof. This use would represent the long-term offering for quick-serve food & beverage, with a permanent restaurant serving as the full-service dining option.

		YEAR 1				YEAR 2			
SHIPYARDS: BEER GARDEN	DURATION	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
SITE: SITE DESIGN/PERMITTING	4 MONTHS								
SITE: SITE WORK	3 MONTHS								
MARKETING: COLLATERAL MATERIAL PREP/GO-TO-MARKET	3 MONTHS								
NEGOTIATION: LOI	2 MONTHS								
NEGOTIATION: LEASE	3 MONTHS								
TENANT: DESIGN	2 MONTHS								
TENANT: PERMITTING	3 MONTHS								
TENANT: CONSTRUCTION	4 MONTHS								

PHASING / SHIPYARDS WEST

		YEAR 4				YEAR 5				YEAR 6				YEAR 7			
SHIPYARDS: FOOD HALL	DURATION	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
BASE BUILDING: DESIGN/PERMITTING	6 MONTHS																
BASE BUILDING: CONSTRUCTION	12 MONTHS																
MARKETING: COLLATERAL MATERIAL PREP/GO-TO-MARKET	1 MONTH																
NEGOTIATION: LOI	3 MONTHS																
NEGOTIATION: LEASE	6 MONTHS																
TENANT: DESIGN	4 MONTHS																
TENANT: PERMITTING	3 MONTHS																
TENANT: CONSTRUCTION	12 MONTHS																

		YEAR 4				YEAR 5				YEAR 6				YEAR 7			
SHIPYARDS: RESTAURANT	DURATION	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
BASE BUILDING: DESIGN/PERMITTING	4 MONTHS																
BASE BUILDING: CONSTRUCTION	6 MONTHS																
MARKETING: COLLATERAL MATERIAL PREP/GO-TO-MARKET	1 MONTH																
NEGOTIATION: LOI	3 MONTHS																
NEGOTIATION: LEASE	6 MONTHS																
TENANT: DESIGN	3 MONTHS																
TENANT: PERMITTING	3 MONTHS																
TENANT: CONSTRUCTION	9 MONTHS																

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THANK YOU.