



2008 ICSC Research Conference Program

**A CHANGING ENVIRONMENT: NETWORKING TO MEET RESEARCH
CHALLENGES**

October 5-7, 2008
Hilton Universal City
Universal City, CA
[Hilton Universal City](http://www.hilton.com)

Sunday – October 5

11:30 am – 7:00 pm **Conference Registration**

12:00 pm – 4:00 pm **Self Guided Market Tours**

Information on Centers of Interest will be available at registration
and at www.icsc.org.

5:30 – 7:00pm **Welcome Reception**
TuTu Tango at Universal City Walk

Monday – October 6, 2008

7:00 am – 7:00 pm **Registration**

7:30 – 8:15 am **Continental Breakfast Served**

8:15 – 8:30 am

Welcome & Opening Remarks

JOHN FOX

ICSC 2008 Research Conference Program Chair
Vice President of Research
Kite Realty Group
Indianapolis, IN

8:30 – 9:30 am

Kick-Off General Session

Guest Speaker

Developer and industry pioneer Rick Caruso will discuss the Caruso style of development, drawing upon his experience from developing projects in Southern California such as The Grove and Americana at Brand.

RICK CARUSO

President & CEO Caruso Affiliated
Caruso Affiliated
Los Angeles, CA

9:30 – 9:45 am

Networking Break

10:00 – 10:50 am

General Session - The Changing Shopping Center Landscape

Retailers face an array of choices today when making store location decisions. Regional Malls, Lifestyle Centers, Power Centers, Power Towns and Mixed-Use projects are examples of the shopping center environments of today. Find out how leading retailers view these different shopping center formats and what kinds of factors go into today's store location decisions.

Moderator:

RANDALL SMITH

Executive Vice President
Westfield America, Inc.
Los Angeles, CA

Speakers:

MICHAEL DASTUGUE

Senior Vice President, Director of Property Development
JC Penney Company, Inc.
Plano, TX

STEVE RICH
Real Estate Director
California Pizza Kitchen
Los Angeles, CA

11:00 am – 11:50 pm

Concurrent Sessions

A. Mixed-Use Development/Mixed-Use Projects

Mixed-Use projects present many challenges and opportunities. This session will discuss the mixed-use projects of today from the perspective of both developers and researchers.

Moderator:

BILL ROSS
Vice President of Asset Management
Forest City Commercial Group
Cleveland, OH

Speakers:

BRIAN JONES
President
Forest City West Coast Development
Los Angeles, CA

SUZANNE MULVEE
Senior Real Estate Economist
Property & Portfolio Research
Boston, MA

RANDALL LEWIS
Vice President
Lewis Operating Corporation
Upland, CA

B. Retailer Market Planning

Moderator:

JIM STONE
Chief Development Officer
geoVue
Woburn, MA

Speakers:

DEBORAH WEINSWIG

Managing Director
Citi Investment Research
New York, NY

KEVIN KING

Senior Vice President of Development
Papa Murphy's International
Vancouver, WA

DANIELLE JORDAN

Managing Partner
ROIC Analytics
Boise, ID

MIKE MURRELL

Distribution Planning & Development
Hallmark Cards
Kansas City, MO

12:00 – 1:15 pm

Networking Luncheon with Table Discussion Topics

All conference attendees should review the list of general topics shown below, choose one that best fits their general interest or area of expertise, and sit at one of multiple tables assigned to each topic. Each table will have a previously designated facilitator to lead discussion during lunch.

Discussion Topics Include:

- Capital Markets
 - Consumer Research
 - Department Stores
 - Developer
 - Retailer
 - Shopping Behavior
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1:30 – 2:30 pm

General Session

“Retail Site Location: A Behind the Scenes Look at the Best Practices from Four Successful Retailers”

A key success factor for all retailers is their location strategy. Depending upon each retailer's core strategy and as such the different internal business questions, retailers make different decisions on how to set up and operate their market research departments. This session will provide a behind-the-scenes look at four retailers with varying retail strategies. Topics to be discussed include department structures, tools and methodologies, challenges, and also the successes and mistakes that have been made along the way.

Moderator:

JIM KING

Principal
JLKing Real Estate Research
Carrollton, TX

Speaker:

MICHAEL SCHMID

Director of Market Research
Lowe's Companies
 Mooresville, NC

TODD VANG

Director of Market Planning and Research
Walgreens Co.
Deerfield, IL

BRIAN STRICKLAND

Director, Market Research
Family Dollar Stores, Inc.
Charlotte, NC

DOUG SCHNELL

Vice President Real Estate/Research
Panera Bread
St. Louis, MD

2:40 – 3:45 pm

Concurrent Sessions

2:40 - 3:10 pm

Tools of the Trade

A - Networking: Creating Real Estate Research Communities

Speakers:

JIM STONE

Chief Development Officer
geoVue
Woburn, MA

LEE KENT

Chief Retail Authority
Targeted Technology Solutions, Inc.
Atlanta, GA

DR. LINDA KATO
Director of Research and Evaluation
Goodwill Industries International, Inc.
Rockville, MD

2:40 – 3:10 pm

B - Measuring Urban Retail Demand

Retail real estate research is benchmarked to key data metrics which include population, income, and spending potential. When urban, or inner city, areas are under consideration, traditional sources, such as the Census Bureau and demographics vendors, are often unable to fully measure population and income/spending potential. This session will consider ways to improve urban real estate research with additional methodologies to better measure the true opportunity associated with urban trade areas.

Moderator:

KAREN SOLHEIM
Owner, Principal
Solheim Research
Santa Monica, CA

Speakers:

GLEN BOYER
Vice President of Real Estate Market Research
Ross Stores
Pleasanton, CA

JOHN TALMAGE
President & CEO
Social Compact
Washington, DC

3:15 – 3:45 pm

C - Consumer Research: Using Customer Transactions for Decisions and Strategy

Speaker:

CARL BRENNER
Senior Manager
Coldwater Creek
Sandpoint, ID

3:15 – 3:45 pm

D - Case Study Investigations – Hispanic-Oriented Retailing and Development – Plaza Mexico - Lynnwood, CA

Speaker:

LUIS VALENZUELA

EVP

NAI Capital, Inc.

Los Angeles, CA

3:40 – 4:00 pm

Networking Break

4:00 – 5:30 pm

Concurrent Sessions

A - Roundtable Discussions and Topics to Include:

- Sales Forecasting: The Latest (and Greatest) Approaches
 - GIS: New Databases - New Approaches
 - Managing & Sharing Research Information Effectively
 - Integrating Site Location Analysis, Loyalty Data & Market Strategy
 - Ageing Demographics: What it Means for Retail!
 - Evaluating Markets - Prioritizing Opportunities
 - Malls: Separating Winners & Losers
 - Cannibalization: Measuring it, Reducing it, Avoiding it!
 - Researching New Shopping Center Formats: What Works & What Doesn't
 - California Consumers: Differences & Similarities with "Average" U.S. Shopping Patterns
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Concurrent Session

B. Vendor Runway Session

Join industry professionals as they showcase state-of-the-art services, data and tools that are available from their companies that can help you do your job better.

Moderator:

JIM BRAND

President

Brand Consulting, LLC.

New Albany, OH

5:30 – 7:00 pm

Sponsored Networking Reception & Products and Services Forum

Tuesday – October 7, 2007

7:30 am – 1:30pm

Registration

7:45 – 8:30 am

Continental Breakfast Served

8:30 – 9:30 am

General Session

Political Panel

Los Angeles Times political reporter and two local congressmen will provide political commentary and also be prepared to discuss issues related to the federal government and the retailing/shopping center industry.

9:30 – 10:45 am

Concurrent Session

A – GIS and Higher Level Modeling Techniques of Major Brands

This session will focus on higher level GIS topics related to data analysis, modeling, sales potential estimating, and store impact/cannibalization estimating. The session will include an overview of the general concepts and data elements required to populate higher-end models/tools for various industry types. The session will discuss methodologies, techniques, and sources used by today's research professional for data collection, model building, application, and ongoing maintenance. In addition, the session will conclude with a peek into real world examples of utilizing GIS, statistical techniques, and other tools to build and apply models for some of America's top brands.

Moderator:

JAMES WALEWSKI

Principal

James Andrew Group, Inc.

Ann Arbor, MI

Speaker:

STEVE DEVANE

Director of Research

Chick-Fil-A, Inc.

Atlanta, GA

9:30 – 10:45 am

B – “Challenges and Opportunities in Starting Up a Research Department or a Research Consulting Practice.

Learn tips and tricks from the experts on setting up an in-house research department or a research consultancy.

Speakers:

KEVIN YOUNG

Director of Market Research
Developers Diversified Realty
Beachwood, OH

BILL SPEER

Principal
Speer Consulting International
Coronado, CA

C – Low Level GIS

GIS 101: Introduction to Mapping Applications in Retail Research and Site Selection

This session will introduce the GIS methodology and technical skills necessary to complete basic real estate and retail research projects. It will also assist new users in evaluating what types of GIS hardware and solutions are appropriate for their particular company. The content of this section will eventually be incorporated into the ICSC's on-line training program.

Speaker:

JOE SCHMIDT

Director of GIS
Site Analytics Co.
New York, NY

10:45– 11:00 am

Networking Break

11:00 – 12:00 pm

General Session – Retail and Shopping Center Fireside Chat

Leading retail and shopping center analysts will engage in a lively and informative discussion of the current issues impacting our industry.

Moderator:

JOHN RIORDAN
ICSC Lifetime Trustee
ICSC Past President & CEO
Cotuit, MA

Speakers:

DEBORAH WEINSWIG
Managing Director
Citi Investment Research
New York, NY

JIM SULLIVAN
REIT Analyst
Green Street Advisors
Newport Beach, CA

BRIAN TUNICK
Managing Director
JP Morgan
New York, NY

12:00 noon - 12:30 pm **Luncheon Served**

12:30 – 1:15 pm **Luncheon Keynote**

MARK ZANDI
Chief Economist, CCO
Moody's Economy.com
Chester, PA

1:15 – 1:30 pm **Closing Remarks**

1:45 – 5:00 pm **Los Angeles Area Shopping Center Tour
(Pre-Registration is Required)**

Planned Tour Locations

- The Grove
- Century City
- 3rd Street Promenade

