



Directory

# Research Connections Conference

Mandarin Oriental

Miami, FL | October 27 – 29, 2019

#ICSCResearch



[www.icsc.com/2019RC](http://www.icsc.com/2019RC)

# Research Connections Conference

## SUNDAY, OCTOBER 27

### Registration

1:00 – 6:30 pm | Ballroom Foyer (5th Floor)

### Retail Tour (Optional Event)

1:30 – 4:45 pm

**Brickell City Centre** is a landmark \$1.05 billion, 4.9 million square-foot, mixed-use development in downtown Miami from Swire Properties Inc. The project's first phase includes a 500,000-square-foot luxury and premium retail centre, two residential towers, the 352-room EAST, Miami hotel and two mid-rise office towers. The project is LEED®-registered for Neighborhood Development – currently one of the largest in the U.S.

The 18-square-block **Miami Design District** is known for both exemplary culture and commerce. Over the past 15 years, the historic low-rise warehouses and commercial buildings have given way to more than 120 contemporary and luxury flagship stores, furniture showrooms, dozens of restaurants, two contemporary art museums and an ambitious program of public art and design. Each season brings new events to the neighborhood, from free concerts to art exhibitions and installations.

**Wynwood Walls** was established in 2009 by the legendary Tony Goldman of Goldman Properties, as an outdoor museum of international street art. Wynwood Walls has become a phenomenon, spurring the creation of murals throughout the Wynwood district. It is now one of the best venues in the world to see the work of leading street artists. A selection of both national and international artists have created artwork for the Wynwood Walls. Encompassing more than 50 dazzling, cutting-edge murals created by respected street artists from Asia, Europe, Latin America and the United States, the Wynwood Walls attracts people from all over the world each year.

Please meet at the front entrance of the Mandarin Oriental at 1:15 pm to board the bus. Bus will depart promptly at 1:30 pm and return to the hotel at 4:45 pm.

Pre-registration was required.

### First-Timers Meet and Greet Networking Event

5:00 – 5:30 pm | Hong Kong A

If this is your first time at the Research Connections Conference or you are new to ICSC, this session will help you make the most of your conference attendance. Seasoned research veterans will be available for networking opportunities in a relaxed environment and answer any questions you may have about the conference or industry. Bring your business cards.

#### HOST



**David Spawn**  
Vice President of Research  
Brixmor Property Group

### Networking Reception and Innovation Center

5:30 – 6:30 pm | Ballroom Foyer

Stop by to speak with vendors about the latest and greatest innovations in research technologies, insights and analytical tools. This is an excellent opportunity to explore the latest trends and find out what is on the horizon.

## MONDAY, OCTOBER 28

### Registration

7:30 am – 6:00 pm | Ballroom Foyer

### Continental Breakfast

7:30 – 8:30 am | Ballroom Foyer

No breakfast service after 8:30 am.

### Welcome and Opening Remarks

8:30 – 8:40 am | Salons 2 & 3



**Ana Leon**  
Research Connections Conference  
Planning Committee Chair  
Vice President, Research & Strategy  
Alternatives  
DWS



**Scottie Lee**  
Vice President, Strategy & Analytics  
Taubman Centers

### Retail 2030

8:40 – 9:20 am | [Salons 2 & 3](#)

The retail industry is rewriting the laws of physics. Change is coming at an ever faster rate each year and 2030 will be upon us before we know it. Explore the world of retail and hear about the key game changers that will drive the greatest transformation over the next 10 years.



**Melina Cordero**  
Managing Director, Retail  
Capital Markets  
CBRE

### The Growing Importance of Sustainability in Retail and Real Estate

9:20 – 10:00 am | [Salons 2 & 3](#)

Listen to subject-matter experts talk about the sustainability efforts in their organizations and why this topic has become so important in the industry today. Learn how sustainability goes beyond the environmental aspects to also include social responsibility and corporate governance – and how consumers, investors and regulatory factors are shaping these efforts.

#### MODERATOR



**Laura Fullington**  
Assistant Vice President, Research  
Macerich

#### PANELISTS



**Heather Beaubien**  
Director of Sustainability  
Chick-fil-A



**Daren Moss**  
Senior Vice President Ops & Sustainability  
Brixmor Property Group



**Christopher J. Oftedal, CDM**  
Senior Regional Manager/  
Director of Sustainability  
Weingarten Realty

### The Halo Effect II: Quantifying the Impact of Omnichannel

10:00 – 10:30 am | [Salons 2 & 3](#)

Explore the results of ICSC's Halo Effect II study that quantifies the incremental in-store spending in the days immediately following an online purchase, and vice versa. The magnitude of this incremental spending further demonstrates the value of physical stores as part of an omnichannel strategy.

#### MODERATORS



**Christopher Gerlach**  
Director, Research  
ICSC



**Jean Lambert**  
Vice President, Research  
ICSC

#### PANELISTS



**Peter Busalacchi**  
Manager, Location Strategy & Analytics  
Sephora USA, Inc.



**Sebastiaan Verrills-Groen, CPA**  
Manager, Global Market Development & Strategy  
Lululemon Athletica, Inc.

### Networking Break

10:30 – 11:00 am | [Ballroom Foyer](#)

### Concurrent Sessions: Thought-Leadership Forums

11:00 – 11:45 am

Interactive discussions on industry-specific topics.

### A. Valuing Retail Real Estate Today [Hong Kong](#)

Learn about the opportunities and challenges in investing in retail real estate from both buy-side and sell-side investors.

#### MODERATOR



**Scottie Lee**  
Vice President, Strategy & Analytics  
Taubman Centers

#### PANELISTS



**Kelly Whitman**  
Vice President Investment Research  
PGIM Real Estate

# Research Connections Conference



**Ryan Zaborske**  
Analyst  
Surveyor Capital



**Eric Zimmerman**  
Managing Director  
Eastdil Secured

## B. Retailer Think Tank

### Bangkok

How retailers are adapting to and taking advantage of changes in the retail landscape.

#### MODERATOR



**Booth Babcock**  
Senior Manager, Real Estate Planning  
Amazon

#### PANELISTS



**Brian McDonald**  
Senior Director, Global Development  
Research & Analytics  
Bloomin' Brands



**Brian Schumacher**  
Director of Real Estate Operations  
Chico's FAS



**Brian Strickland**  
Vice President, Enterprise Analytics  
Signet Jewelers

## C. Data Science in Retail

### Brickell Key

How retailers can synthesize large amounts of information into actionable insights.

#### MODERATOR



**Gregg Katz**  
Chief Strategy Officer  
The Shopping Center Group

#### PANELISTS



**Karan Singh**  
Business Intelligence Data Architect  
Brookfield Properties



**Paige Stover**  
Senior Director of Analysis  
Forum Analytics

## Lunch

11:45 am – 12:30 pm | [Ballroom Terrace](#)

No lunch service after 12:30 pm.

## Keynote: Retail Remastered

12:30 – 1:30 pm | [Salons 2 & 3](#)

Retail Remastered offers an overview of how the retail landscape and, more fundamentally, consumer culture as a whole is shifting, and what to do to stay ahead. Katie Baron will outline five key engagement strategies for brands and retailers and the opportunities they will open up, from re-establishing exclusivity and leveraging softer selling tactics, to the value of a broadcast brandscape and the dawn of hyper-reality retail.



**Katie Baron**  
Head of Retail Trend Intelligence Service  
Stylus

## The Power of Tourism in Miami

1:40 – 2:00 pm | [Salons 2 & 3](#)

Hear the latest tourism trends and statistics from the Greater Miami Convention & Visitors Bureau. This session will explore the economic impact of retail tourism in Miami.



**Rolando Aedo, CDME**  
COO  
Greater Miami Convention & Visitors Bureau

## How to Reach the Growing Hispanic Demographic

2:00 – 2:20 pm | [Salons 2 & 3](#)

Eighteen percent of the U.S. population is Hispanic or Latino according to the U.S. Census Bureau. In Florida's Miami-Dade County, 69% of the population is Hispanic or Latino with an expected increase of 19.6% by 2030. Given these trends, find out how landlords and retailers can appeal to this demographic cohort.



**David Mesas**  
Vice President, Business Development  
Claritas

The Future of Retail Metrics

2:20 – 3:00 pm | Salons 2 & 3

Learn about the changing mindset of retail financial leaders and a series of new complementary metrics that will drive a more holistic assessment of retailers operating within a one-channel retail environment.

MODERATOR



**Meredith Darnall**  
Senior Vice President  
Business Intelligence & Strategy  
Brookfield Properties

PANELIST



**Rod Sides**  
Vice Chairman & U.S. Leader, Retail  
Wholesale & Distribution Practice  
Deloitte

Roundtable Discussions

3:10 – 5:00 pm | Salons 2 & 3

You will have the opportunity to sit in on three, 30-minute roundtable discussions, learning and sharing insights with colleagues and specialists.

Table #	Topic and Leader
1	<b>Consumer Insights</b> <i>Kevin Akyeampong, Cadillac Fairview</i>
2	<b>The New Luxury: Health, Wellness &amp; Beauty</b> <i>Keisha Virtue, JLL</i>
3	<b>The Tale of Two Malls: Open-Air vs. Enclosed</b> <i>Nicole Sadowsky, The Concord Group</i>
4	<b>Navigating the Retail Real Estate Industry</b> <i>David Spawn, Brixmor Property Group</i>
5	<b>Utilizing Census E-Commerce Data</b> <i>Christopher Gerlach, ICSC</i>
6	<b>What's in Store for the Future of Grocery?</b> <i>Kevin Bissell, MTN Retail Advisors</i>
7	<b>Insights from Mall Traffic and Data Collection</b> <i>Marco Biasiotto, Oxford Properties Group</i>

Table #	Topic and Leader
8	<b>Do New Retail Formats Engage Customers?</b> <i>Matt Panfel, ICSC</i>
9	<b>How Service-Oriented Tenants are Changing Retail</b> <i>Michael Jordan, ShopCore Properties</i>
10	<b>Tech in Retail</b> <i>Booth Babcock, Amazon</i>
11	<b>Mobile Location Data: the Good, the Bad and the Ugly</b> <i>Gregg Katz, The Shopping Center Group</i>
12	<b>Store Site Strategy: What's Working and What's Not?</b> <i>Jeremy Krotz, Brookfield Properties</i>
13	<b>Spatial Analytics in a Connected Age</b> <i>Bryan Chandler, The Shopping Center Group</i>
14	<b>The Rise of "New" Retail</b> <i>Alex Doherty, Target</i>
15	<b>Property Quality Evaluation: What Metrics Should We Be Using?</b> <i>David Domb, Kimco</i>

Networking Reception and Innovation Center  
5:00 – 6:00 pm | Ballroom Foyer

Food Hall Tour at St. Roch Market  
(Optional Event)

6:30 – 8:00 pm

St. Roch Market is a chef-centric food hall, located in the heart of Miami's Design District, featuring a thoughtfully curated mix of local food-and-beverage talent. It's a destination for the culinarily curious to explore a variety of new cuisines, with 11 exciting dining options all centered around the award-winning craft cocktail bar, The Mayhaw. St. Roch Market has curated a mix of the best up-and-coming chefs and bartenders and empowered them to tell you their stories through their creations.

Please meet at the front entrance of the Mandarin Oriental at 6:00 pm to board the bus. Bus will depart promptly at 6:10 pm. Bus will depart St. Roch Market at 7:15 pm and again at 8:00 pm.

# Research Connections Conference

Pre-registration was required and available on a first-come, first-served basis.

## HOSTS



**James Cook**  
Americas Director of Retail Research  
JLL



**David Spawn**  
Vice President of Research, Marketing  
Brixmor Property Group

## TUESDAY, OCTOBER 29

### Registration

7:00 am – 1:00 pm | Ballroom Foyer

### Continental Breakfast

7:00 – 8:00 am | Ballroom Foyer

No breakfast service after 8:00 am.

### Enhancing the Consumer Experience: How Retailers are Using AI to Win

8:15 – 8:45 am | Salons 2 & 3

An in-depth discussion on how AI is impacting retail and the in-store experience.

#### MODERATOR



**Marie Driscoll**  
Managing Director of Luxury  
and Fashion  
Coresight Research

#### PANELIST



**Whitney Cathcart**  
Co-Founder/CSO  
3DLOOK

### Retail Crossroads: Balancing the Maturing Economic Cycle

8:45 – 9:15 am | Salons 2 & 3

Is the economy approaching a tipping point? Key factors impacting the growth outlook and what it means for the retail sector.

#### PRESENTER



**John Chang**  
Senior Vice President, National Director  
Marcus & Millichap Research Services

### Food Trends and the Evolution of Casual Dining

9:15 – 9:50 am | Salons 2 & 3

Be ready for the future of food. Understand the adaptations that F&B operators are making, learn about new digital native concepts and innovations in fast casual and casual dining, and keep up-to-date on the trends changing the face of food.

#### MODERATOR



**James Cook**  
Americas Director of Retail Research  
JLL

#### PANELISTS



**Meghann Martindale**  
Global Head of Retail Research  
CBRE



**Suk Singh**  
ICSC Past Trustee  
Executive Vice President, Global Chief  
Development & Franchising Officer  
Bloomin' Brands

### Mixing It Up

9:50 – 10:30 am | Salons 2 & 3

Mastering mixed-use retail is both an art and a science. Hear how the integration of other uses reinvigorates spaces and makes places.

#### MODERATOR



**Michael Comras**  
President & CEO  
The Comras Company

#### PANELISTS



**Greg Covey**  
Senior Director, Leasing  
WS Development



**Richard Gollis**  
Co-Founder & Principal  
The Concord Group



**Drew C. Schaul**  
Senior Vice President, Global Retail  
Services  
CBRE



**John R. Tschiderer**  
Senior Vice President, Development  
Federal Realty Trust

### Concurrent Sessions: Mixed-Uses

10:40 – 11:10 am

Deep dives into the two most popular, new tenant classes.

#### A. Entertainment | Salon 1

A look at new entertainment concepts that are sure to make you want to visit the mall again and again.

##### PANELISTS



**Marco Biasiotto**  
Senior Director – Analytics, Insights & Innovation  
Oxford Properties



**Clay Hallman**  
Vice President, Real Estate Research  
Simon



**Dimitri Lalagos**  
Senior Vice President, Leasing  
Triple Five

#### B. Healthcare | Hong Kong

How three innovative companies are addressing the needs of customers with convenient healthcare solutions.

##### PANELISTS



**Kristin Goedke**  
Director, Real Estate  
Aspen Dental Management, Inc.



**Richard Matthews**  
Director, Real Estate Research  
The Joint



**David Miller**  
DVP Planning & Performance  
Walgreens Boots Alliance

### Boxed Lunch and Networking Break

11:10 – 11:30 am | Ballroom Foyer

### Miami Worldcenter – The Redefinition of Live, Work, Play

11:30 – 11:50 am | Salons 2 & 3

At nearly 30 acres, Miami Worldcenter is one of the largest mixed-use destinations being created globally. Find out how it's bringing a new energy and cultural center to Miami with a compelling blend of exceptional retail, hospitality, residential and commercial offerings in one unique location.



**Nitin Motwani**  
Managing Partner  
Miami Worldcenter

### The Future of Grocery and Online Fulfillment

11:50 am – 12:20 pm | Salons 2 & 3

The Florida market is becoming one of the most competitive grocery environments in the country. The changes to retail have also begun to affect grocery operations locally and across the country. Find out how online fulfillment is changing the way grocers conduct business and what changes are ahead for traditional grocer operations.

##### MODERATOR



**Doug Munson**  
Principal  
MTN Retail Advisors

##### PANELISTS



**Edward Hudson**  
Senior Director of Corporate Research  
Kroger



**Matt Powers**  
Executive Vice President, Retail & E-Commerce Distribution  
JLL



**Mark Thompson**  
Founder  
GroceryAnchored.com



# Research Connections Conference

## Cannabis: A Retail High

12:20 – 12:50 pm | **Salons 2 & 3**

Cannabis and CBD are rapidly going mainstream, attracting major investment and the active participation of publicly traded companies involved in the cultivation, processing, and/or distribution of various forms of cannabis products. It's also spawning a whole new crop of businesses. Find out about the challenges facing many multi-state operators.

### MODERATOR



**Andrew Nelson**  
Chief Economist  
Nelson Economics

### PANELISTS



**Mike Demetriou**  
COO  
Baum



**Daniel Dietz**  
Real Estate Manager  
iAnthus Capital and GrowHealthy



### Evan Stafford

Senior Vice President, Global Sales & Expansion  
Leaflink, Inc.

## Closing Remarks

12:50 – 1:00 pm | **Salons 2 & 3**



### Ana Leon

Research Connections Conference  
Planning Committee Chair  
Vice President, Research & Strategy  
Alternatives  
DWS

## Meeting Adjourns

1:00 pm

*Program information current as of October 17, 2019.*

## PROGRAM PLANNING COMMITTEE

**Ana M. Leon**, Research Connections Conference Planning Committee Chair, DWS

**Scottie Lee**, Research Connections Conference Planning Committee Co-Chair, Taubman Centers

**Booth Babcock**, Amazon

**Marco Biasiotto**, Oxford Properties Group

**Kevin Bissell**, MTN Retail Advisors

**Peter Busalacchi**, Sephora USA, Inc.

**James Cook**, JLL

**Melina Cordero**, CBRE

**Taylor Coyne**, JLL

**Meredith Darnall**, Brookfield Properties

**Steve DeVane**, Chick-fil-A, Inc.

**Jillian Elder**, Ross Stores, Inc.

**Laura Fullington**, Macerich

**Clay Hallman**, Simon

**Craig Harris**, AT&T Services

**Brian Schumacher**, Chico's FAS, Inc.

**David Spawn**, Brixmor Property Group

**Sebastiaan Verrills-Groen**, Lululemon Athletica, Inc.

**Deborah L. Weinswig**, Coresight Research, Inc.



THANK YOU TO OUR SPONSORS

Global



**Cushman & Wakefield** (NYSE: CWK) is a leading global real estate services firm that delivers exceptional value for real estate occupiers and owners. Cushman & Wakefield is among the largest real estate services firms with approximately 51,000 employees in 400 offices

and 70 countries. In 2018, the firm had revenue of \$8.2 billion across core services of property, facilities and project management, leasing, capital markets, valuation and other services. To learn more, visit [www.cushmanwakefield.com](http://www.cushmanwakefield.com) or follow @CushWake on Twitter.

Gold



**Environics Analytics** is the premier data, analytics and marketing services company in North America. We offer a full range of analytical services, from data supplier to strategic consultancy. Our software platforms provide quick and easy access to our comprehensive data—

including the latest mobile data—and analytics workflows to generate authoritative reports and detailed maps that help solve business challenges. We specialize in site location planning, trade area definition, site modeling, network optimization and market potential analysis. With a team of over 200 statisticians, geographers, modelers and business strategists, Environics Analytics offers a wide range of U.S. and Canadian data products and services to help clients in every industry sector achieve their business objectives.



At **Korem**, we recommend, sell and integrate the industry's top geospatial data and software. We have been contributing to our client's success for the past 25 years by optimizing their decision-making and strategic processes.

Our goal is to provide and recommend the best available products in the industry to our customers through our team of experts by leveraging our strategic alliances. We support retailers in their digital transformation by helping them with site selection, market research, multichannel, pricing policy, supply chain and real estate operations. Geospatial solutions make it easier to visualize hidden trends related to your sales data, your customers and your competitors.

Bronze



Member-Hosted Reception

Downtown Doral

## INNOVATION CENTER EXHIBITORS



**AggData** is the only source for current locations, historical data, and future openings and closings. AggData monitors over 6.5 million existing locations worldwide, maintains a historical database containing more than 10 years of archived locations, and tracks hundreds of new future openings and closings daily. The ever-growing database of approximately 6,000 retailers is backed by the industry's premier Quality Assurance team comprised of in-house financial analysts, research professionals, artificial intelligence, and a series of manual and automated validations. In addition to API/SFTP feeds, self-service exports, and email alerts, AggData offers a proprietary mapping UI containing geospatial tools for Void and Proximity analyses, demographic analytics, and the unrivaled Future Retail Openings&Closings system [ROC]. Join the many retailers, restaurants, and real estate investors that choose partnerships with AggData.



**ChainXY** is a data solution that provides quality, curated chain list data for retail, grocery, restaurant, and real estate professionals. After years of working with all of the available datasets in the marketplace, ChainXY was founded because a group of industry veterans decided they could do it better. We have set out to provide quality datasets that offer value to professionals conducting market research, and created a service that not only provides data, but offers a technology platform built from the ground up to interpret and interact with the data. Our team validates the lists we collect to maintain currency and improve positional accuracy. ChainXY has created a multi-step spatial geocoding and compilation process that melds new wave data science with the human touch. Location matters, and it is our goal to use our industry expertise and backgrounds as research analysts to develop datasets of uncompromising quality.



**Environics Analytics** is the premier data, analytics and marketing services company in North America. We offer a full range of analytical services, from data supplier to strategic consultancy. Our software platforms provide quick and easy access to our comprehensive data—including the latest mobile data—and analytics workflows to generate authoritative reports and detailed maps that help solve business challenges. We specialize in site location planning, trade area definition, site modeling, network optimization and market potential analysis. With a team of over 200 statisticians, geographers, modelers and business strategists, Environics Analytics offers a wide range of U.S. and Canadian data products and services to help clients in every industry sector achieve their business objectives.



**Korem**, we recommend, sell and integrate the industry's top geospatial data and software. We have been contributing to our client's success for the past 25 years by optimizing their decision-making and strategic processes. Our goal is to provide and recommend the best available products in the industry to our customers through our team of experts by leveraging our strategic alliances. We support retailers in their digital transformation by helping them with site selection, market research, multichannel, pricing policy, supply chain and real estate operations. Geospatial solutions make it easier to visualize hidden trends related to your sales data, your customers and your competitors.



**PlaceWise Digital** is the leading provider of digital services to the shopping center industry. Established in 1998, the company delivers over 200 million digital engagements annually, connecting shoppers to over 800 shopping center clients throughout North America. Their unique

digital perspective of shopper behavior, engagement and expressed preference through advanced personalization are a core competency and have provided a natural bridge to PlaceWise Digital's current data and insight services, which include: Visitation Analytics, Shopper Demographics, Competitor Insights and Comparison, Consumer Product Spend Insights, Foot Traffic Analysis and Mapping, Digital Campaign Attribution and more. PlaceWise is privately held and based in Denver, Colorado.



Recently mentioned in the *Wall Street Journal*, **Planned Grocery** was built to give our members the best data and tools available on the market today to assist with retail real estate development and grocery competition tracking. Our proprietary Planned Grocery data layer is

updated daily to reflect the quickly changing nature of real estate development. This data layer shows grocery store sites that are either proposed, planned, under construction, or built within the last six months. Each point references a public information source and all points are hand placed on the map. There is no automation in this process that results in false locations on the map due to errors in geocoding. This easy to use platform also includes interactive mapping with demographic layers, parcel data with ownership information, and two new analytics dashboards. Visit us at [www.plannedgrocery.com](http://www.plannedgrocery.com) or call +1 888 511 5866 to see how companies such as Whole Foods, Regency Centers, and Heartland Dental use Planned Grocery.



**Thasos** helps you understand the shopping habits of the visitors to your properties. Thasos provides information around who is visiting a property, where they are coming from, and which stores are most

popular within a specific area. Thasos can also provide estimates of sales at a store, and cross shopping patterns of those visitors. Customers use this data to evaluate potential acquisition targets, and empower their leasing negotiations. Thasos can provide data at almost any location across the U.S., both at your properties or your competitors. Find out more by emailing [info@thasos.com](mailto:info@thasos.com) or visiting their booth.



**UberMedia**

**UberMedia** provides the highest quality mobile data solutions trusted by businesses to creatively solve their persistent challenges. The company's diverse suite of products process billions of social, demographic, and

location signals daily for Fortune 500 companies across retail, commercial real estate, tourism, and more to better understand and influence modern consumers with the most accurate business decision science.



**Unacast** is a human mobility data company that harnesses device location data, map data, and strategic intelligence to tackle business challenges for the retail real estate industry. Whether companies need

insights at the venue, brand, industry, neighborhood, city, or country scales, our Real World Graph is flexible enough to deliver bespoke curated data for any location-based query in the U.S. or across the globe. With a data-science-first approach, we help retailers, brokers, developers, and data analysts tackle challenges such as determining total addressable market, segmenting audiences, gathering intelligence on competitors, measuring the performance of one or more existing locations, or selecting sites for new locations. What sets us apart is our perpetual pursuit of quality over quantity so that our clients feel confident that their data accurately reflects real-world events.