



ICSC Research Connections Conference

JW Marriott Austin | Austin, TX

October 16 – 18, 2016 | #ICSCResCon

ROBERT BOYLE is Senior Director of Market Research, Retail at Ivanhoe Cambridge a leading investor, manager and developer of super-regional shopping centres, outlet centres and mixed use developments. Rob's primary responsibilities include overseeing the company's various retail research programs both in Canada and internationally. His area of expertise includes customer profiling, property and corporate strategic planning and analysis, assessing development opportunities and evaluating economic, demographic and industry trends. He has been actively involved in numerous research assignments across Canada as well as in the U.S., Brazil, India, China and Europe. Rob is actively involved with The International Council of Shopping Centers (ICSC) having written several articles for their journals, participated on various panel discussions and lectured at educational seminars. In 2007, he chaired ICSC's annual North American Research Conference in Toronto, the first time this event was held in Canada. He is past Vice Chair of ICSC's North American Research Task Force (NARTF) and a founding member of their affiliated Canadian Research Group (CRG). In 2011, he was a recipient of ICSC's Award for Outstanding Service to the Research Community. Prior to joining Ivanhoe Cambridge in 1998, Rob was with the real estate consulting division of PricewaterhouseCoopers (PWC) for 10 years. He is a member of Canada's Marketing Research and Intelligence Association (MRIA) and currently holds their designation as a Certified Marketing Research Professional (CMRP).

JOHN G. CROMBIE is the Senior Vice President, Retail Leasing Canada at Triovest Realty Advisor Inc. and has been in commercial real estate for almost 30 years. In his current role, John leads the national retail leasing team, retailer relations, and developing new business opportunities for Triovest. John's real estate career started in 1986 in Toronto where he was a successful office leasing specialist for nine years and earned the President's Round Table Award for excellence in sales performance. From 1994 to 1998, he was Director of Leasing for Oxford Properties Group, one of Canada's largest owners of commercial properties. In 1998, he rejoined Royal LePage Commercial as Vice President and General Manager of its Edmonton business and then returned to Toronto in 2000 to manage the Toronto East Operations for Cushman & Wakefield until 2010 when he became responsible for providing strategic direction and developing national and international sales and brokerage opportunities for Cushman & Wakefield's Canadian retail business line. John is a member of a number of professional associations including the International Council of Shopping Centres (ICSC) and the National Association of Industrial and Office Properties (NAIOP). He is also a past Board Member for the Commercial Council of the Toronto Real Estate Board (TREB), Board of Director for the ICSC Foundation for Canada, the 2016 Chairman of the Canadian ICSC Convention, an appointed member to the ICSC Canadian Research Group (CRG), a Canadian representative of the North American Research Task Force (NARTF) and recently received the ICSC Global Gold Medallion Award for his contribution to retail research. A noted industry spokesperson, John has been the keynote speaker at a number of conventions and seminars and has been an expert resource for articles and news reports in various publications such as the Globe & Mail, Toronto Star, Canadian Business, BNN and CTV television. John earned his Bachelor of Arts Degree in Urban Development from the University of Western Ontario in 1985, is a licensed Real Estate Broker in the Province of Ontario and a member of the Institute of Corporate Directors and holds an ICD.D designation.

BILL DAKAI oversees all technology development at Trade Area Systems and is responsible for the Roadmap of our products, bringing a retailer perspective to everything TAS does. He is also actively involved in sales. Before Trade Area Systems, Bill was Director of Market Research for CVS Pharmacy. While at CVS, Bill managed the analysis of approximately 2,000 site studies and was responsible for optimizing the locations of stores in new markets. Under his oversight, the Market Research team helped the company expand into Florida, Chicago, Phoenix, Las Vegas, Minneapolis, and California.

Bill received his Master's degree in Geography from the University of North Carolina at Charlotte and currently lives in Millville, MA, with his wife and two children. His hobbies include mountain biking, hiking and coding.

JONATHAN N. DYKE is currently Co-founder and chief Operating Officer of Spring Marketplace, Inc., a Chicago based that connects digital marketing with real time payment data and in-store sales. Spring works with leading mall operators across the world including Simon, Macerich, Taubman, Starwood and Preit building innovative shopper rewards programs. Prior to Spring, Jonathan served as Chief Operating Officer for edō Interactive where he was instrumental in defining a new advertising category that is now called "card-linked offers". As COO, he was responsible for building a team of over 100 people in Nashville, Chicago, New York and San Francisco. He was responsible for the day-to-day execution of edō's strategy managing sales to merchants (national and SMB), sales to financial institutions (top 20 issuers and processors), technology and product development. Today, the edō Network includes over 50M consumers and several hundred large merchants. From 1995 to December 2007, Jonathan served in many roles the Corporate Executive Board Company (nasdaq: EXBD). Most recently as Managing Director (1999 – 2002) and the Chief Information Officer (2002 – 2007) responsible for managing the firm's information technology infrastructure, channel management and customer facing initiatives. In 2003, he launched the firm's operations in Gurgaon, India growing the office to over 150 team members. As CIO, he managed a team of over 200 professionals across the world supporting CEB's business operations. Jonathan received his B.S. in Human and Organizational Development from Vanderbilt University in 1993 and an MBA with a concentration in Marketing from the George Washington University in 2000. He currently lives in Nashville with his wife and their two children.

CRAIG HARRIS serves as Associate Director of Retail Real Estate Analytics for AT&T providing tools and support for corporate and authorized retail channel location distribution planning analysis. Prior to AT&T, Craig, with 25 years retail real estate analytics experience, held location research positions with Lowe's Home Improvement Warehouse; Sears Roebuck & Company; Hechinger Home Improvement Stores; and Thompson Associates. Craig holds a Master's in Urban Planning, a bachelor's degree in Geography with a co-major in Urban Studies from Wayne State University in Detroit and is a prior ICSC Research Connections panelist and roundtable moderator.

AMY HARRISON, Global Market Mapping Manager for Nike, has been a part of the Nike Real Estate organization for the past eight years. Prior to her current role in Nike Global Retail Real Estate, she spent four plus years in the North America Retail Real Estate department, ending in the role of Real Estate Operations Manager. During her tenure in NA she was responsible for research and analytics related to marketplace planning strategy and new store evaluation. In her current role she manages all aspects of Nike's global market mapping system run on the Esri platform: functionality development, training, best practices for analytics and application of system tools, and data resourcing and implementation for use in the mapping tools. The mapping system is utilized across multiple business units within Nike's Retail and Wholesale organizations as well as other departments at Nike.

CEDRIK LACHANCE has been with Green Street since 2004. He leads the firm's U.S. REIT research team and continues to head coverage of the net lease sector. Cedrik has in the past led coverage of the retail and industrial sectors and been co-head of the office sector in the U.S. In addition, he has led our European industrial research. During his time at Green Street, Cedrik has participated in the publication of research reports on almost 50 REITs and real estate companies listed in the U.S., Europe, Australia and Canada. Cedrik won the Wall Street Journal's "Best on the Street" award in the real estate category in 2008. He is a member of the International Council of Shopping Centers (ICSC) and NAREIT. Cedrik earned his M.B.A. from the Tuck School of Business at Dartmouth. He also holds a Master's in International Relations from the University of Toronto and a B.A. in History from Université Laval.

Upon earning his Bachelor of Science degree with a specialization in geography from Michigan State University, **BILL MCKEOGH** has spent the past 12 years of his career working in the Location Intelligence field. Serving clients in the US and Canada, Bill's vertical experience includes retail, restaurant, health-care, and telecommunications. With a passionate and focused approach, Bill leverages his expertise in market research, spatial analytics and data visualization to advise on complex issues. By developing and implementing strategic solutions on behalf of his clients, Bill has embraced the Pitney Bowes adage by being a true "Craftsman of Commerce."

DAVE MILLER, 23 years of experience with Walgreens Boots Alliance the nation's leading pharmacy with over 8000 locations. During that time, he's held several positions in the Strategy & Finance divisions. His current title is Senior Director – Market Planning & Research. This research group is primarily responsible for analyzing and guiding the growth activities of the company across all business units (Organic Retail, Mergers & Acquisitions, Specialty, Emerging Rx Services, Health Systems & Providers, Market Level Payer Analysis, Field Operations, and other Healthcare Business Units).

- *Personal Responsibilities Include:*
 - 20 years of management experience with a staff of managers/project managers/analysts ranging 5-15 direct reports.
 - Travel extensively throughout the U.S. (All major markets, plus multiple small markets). Also some experience in the UK, Mexico, and Puerto Rico.
 - Member of the bi-weekly Real Estate Committee, Investment Deployment Committee, Pharmacy Investment Committee, and RAD Integration Planning Team
 - Liaison with the Field Operations, M&A, Real Estate, Finance and other departments on growth issues
 - Acquisition analysis (detailed strategic/overlap analysis provide directly to executives)
 - Lead in the development of GIS & other improved methodologies to aid the real estate process
 - Lead in the development of Healthcare & Pharmacy analytics and modeling methods
- *Specialties:*
 - Management, Market Strategy Development, Advanced Analytics & Modeling, Pharmacy & Healthcare, Mergers & Acquisitions, GIS, Real Estate Research

As Chief U.S. Economist, **ANDREW NELSON** develops the firm's economic and market perspectives and provides strategic advice to the firm's clients. In collaboration with the U.S. leadership team, he is responsible for driving Colliers's research agenda and leading the U.S. research team in providing insight, thought leadership and guidance about commercial real estate, capital markets and financial investment and related sectors. Prior to Colliers, Andrew spent eight years at Deutsche Asset & Wealth Management, most recently as Director, Research & Strategy in the Americas, where he managed the U.S. Research team and was the retail sector and sustainability specialist. Previously he held a variety of leadership positions in both the public and private sectors including Vice President of HOK Advance Strategies, where he served as national practice leader of the Portfolio Services service line. He also managed a construction-lending program for the World Bank in Russia, held a two-year "Community Builder" fellowship with the U.S. Department of Housing and Urban Development, and managed the regional real estate consulting practice at Deloitte & Touche in San Francisco. Andrew holds a Master of City and Regional Planning from Harvard University and is the author of numerous articles on real estate sustainability, macroeconomics, retail sector dynamics and other topics in property economics, market research and demographics. Among other industry involvement, Andrew sits on the editorial board of the Journal for Sustainable Real Estate and was outgoing Chair of the North American Research Task Force for the International Council of Shopping Centers. He is also a certified general real estate appraiser in California and a member of the Urban Land Institute. He was a 2015 Gold Medallion Award for research from ICSC. Andrew has been the invited speaker at numerous professional conferences including for the Mortgage Bankers Association (MBA), U.S. Green Building Council (USGBC), the Urban Land Institute (ULI), International Council of Shopping Centers (ICSC), the National Association of Real Estate Investment Trusts (NAREIT), the National Council of Real Estate Investment Fiduciaries (NCREIF), and the Pension Real Estate Association (PREA).

KEITH READING has more than 27 years of progressively senior Canadian and U.S. real estate analytics experience, gained in various corporate and institutional roles. Currently, he holds the position of Director, Research with Morguard Investments Limited, one of Canada's leading and largest integrated real estate investment and management organizations with a diversified portfolio of North American assets under management valued at CAD\$19.4 billion. The diversified portfolio is comprised of a combined 45.6 million square feet of retail, office, and industrial space, 19,009 multi-suite residential units and 6,642 hotel rooms. Morguard offers investment and property management services over a network of offices in Canada's major markets and in major markets in the US. During his 27-year career in real estate research analytics, Keith has been recognized as one of Canada's leading analysts. Keith began his career in commercial real estate analysis with Colliers International, one of Canada's largest real estate services companies. His 15-year tenure with Colliers culminated in the role of Vice-President, Research with national responsibility. In 2008, he led RealNet Canada's Toronto Commercial Research Team as Senior Analyst. RealNet Canada is considered the "Bloomberg" of property market research in Canada. Keith's career accomplishments include regularly quotation in various regional and national media outlets. In addition, he offers intelligence, insights, and strategic investment and leasing advice on economic and real estate fundamentals, trends and outlooks to clients, colleagues and institutions of higher learning. He has also authored numerous market reviews, surveys, opinions and white papers on a range of commercial real estate and related topics. Through these experiences he has produced Colliers International's: Canadian Real Estate Review, Canadian Investment Review and Canada's Office Markets: An Assessment. In addition, he has authored Morguard's Annual Economic Outlook and Fundamentals Report since 2008. Keith is a past member of the National Association of Industrial and Office Practitioners, the Toronto Real Estate Board and is a member in good standing of the International Council of Shopping Centres. Keith holds a BAA from Ryerson University in Urban Analysis.

KELLY WHITMAN is Vice President of Investment Research at PGIM Real Estate. Prior to joining the firm in 2015, she spent nine years at Property Market Analysis in London, where she initiated and lead PMA's coverage of US property markets for its global research service. Before that, she spent five years at Property & Portfolio Research (now CoStar Portfolio Strategy) as a senior real estate economist serving as the firm's lead retail strategist and also establishing a European research function. Kelly started her career as an Economist with Moody's Analytics. She holds a Bachelors degree in Economics and International Relations from the University of Delaware and a Masters Degree in Economics from Tufts University.

SUSAN WILLIAMS

As Senior Director, Strategic Insights at Cadillac Fairview Corporation is a strategic marketing professional with over 30 years of experience in Strategy, Marketing and Research through work in corporate, retail, government, consumer markets. Susan is currently heading up the Research and Analysis group within Strategic Insights at Cadillac Fairview, developing strategies for senior executives, operations and sales to drive decisions for the future direction of real estate. Over the past eighteen years at Cadillac Fairview, Susan has lead teams of professionals in the development of an integrated research function leveraging a vast databank of market, consumer and retail trend research, as well as developing and launching new initiatives in the area of marketing from CF's first foray into digital marketing and social media, to creating the first mall gift card program in Canada, the SHOP! CARD, and launching ecommerce platforms. Susan plays an active leadership role in the Retail/Commercial Real Estate and Market and Consumer Research communities in North America as Vice Chair of the ICSC Canadian Research Group and member of the NARTF. She is also active on several committees and presenter at industry conferences within ICSC, MRIA, AMA, AARM and ICSC CRG. CSCA, REALpac.

Susan holds an Honours Bachelor of Commerce Degree from McMaster University in Hamilton, Ontario. She enhanced her marketing management qualifications through courses from the Richard Ivey School of Business at the University of Western Ontario and Professional CRM and CMRP (Research) designations.

MICHAEL ZUNG is currently heads marketing and business development for Fung Global Retail & Technology, the Fung Group's retail think tank. He also advises start-ups Current Asia, MuseFind, and Gormeji, and is a mentor at leading accelerator Entrepreneur's Roundtable in New York. Zung previously worked for ad tech pioneer DoubleClick (now Google) where he was in charge of North Asia, Bazaarvoice where he headed up Asia, and HSBC where he led direct banking in Taiwan, and sold his Hong Kong based digital marketing start up OneXeno to London-based Text 100 in 2010.