

**5TH EUROPEAN RESEARCH
SEMINAR**

3-4 NOVEMBER 2005
WESTIN GRAND
BERLIN GERMANY

RISE TO THE RETAIL CHALLENGE

**ONE EUROPEAN MARKET: RETAIL DEVELOPMENT CHALLENGES
AND SOLUTIONS**

FEATURING INSIGHT AND OPINION FROM...

SONAE SIERRA

ÁLVARO PORTELA, CEO

BROADWAY MALYAN

MELVIN DAVIS, RETAIL DIRECTOR

CRABTREE & EVELYN

MIKE TORRANCE, MD EUROPE

DIFA AG

LARS RICHTER, HEAD OF RETAIL DEVELOPMENT

...PLUS OTHER TOP INDUSTRY NAMES.

**FEEDBACK SAID "A
VERY GOOD
EXPERIENCE:
VERY GOOD
SPEAKERS"**



DAY ONE – THURSDAY 3 NOVEMBER 2005

RISE TO THE RETAIL CHALLENGE | SEMINAR PROGRAMME

**09:15 RALF-PETER KOSCHNY, BOARD DIRECTOR,
BULWIENGESA AG, GERMANY**

Opening remarks from the Chairman

**09:30 KEY NOTE ADDRESS ÁLVARO PORTELA, CEO,
SONAE SIERRA, PORTUGAL**

The developer's point of view

- The company and benefits of an in-house research department
- Market research usage and decision making on moving into a new market: Germany
- Case-study: Researching Alexa, a new project under development at the Alexanderplatz, Berlin

**10:15 MARK ESPINET, EUROPEAN RETAIL PARTNER,
PROPERTY MARKET ANALYSIS (PMA)**

How can strategic research help pan-European investors and developers?

- The demand side: understanding the consumer economy and Europe's changing retail landscape
- The supply side: shopping centres versus other retail formats; the impact of future development
- Market conditions: what do key indicators (rents, vacancies, yields) tell us about the current state of play?
- Market outlook: the pros and cons of forecasting future market performance

10:45 NETWORKING BREAK

**11:30 MIKE TORRANCE, MD EUROPE,
CRABTREE & EVELYN, UK**

Investigating consumer habits: research successes

- Identifying the business needs
- The footfall solution
- Measuring success

**12:00 MELVIN DAVIS, RETAIL DIRECTOR,
BROADWAY MALYAN, UK**

How can designers use research to enhance the creative process?

- Who are the customers, or who does the research indicate they should be?

- What will the environment be to satisfy tenant demand?
- How do you future-proof your design to allow for emerging market trends?

12:30 LUNCH AND ROUND TABLE DISCUSSIONS

**14:30 A DEBATE BETWEEN AXEL FUNKE, AM DEVELOPMENT
GERMANY AND GERD DUNSTHEIMER, ECE, MODERATED
BY CARL OTTO WENZEL, WENZEL CONSULTING**

Is leisure fundamental to the future of shopping centres – or just a waste of space?

**15:30 LARS RICHTER, HEAD OF RETAIL DEPARTMENT,
DIFA AG, GERMANY**

Deciding to invest

- Research and acquisitions
- Site analysis – an essential piece of the puzzle
- After purchase – the longer term view

16:00 NETWORKING BREAK

**16:15 THOMAS BRÜDIGAM, PRESIDENT,
VERTANO REAL ESTATE, POLAND**

Not all centres are alike – new shopping schemes in Poland

- Inner city shopping centres – a conceptual approach
- The shopping centre as a meeting place – an embarrassment or a unique experience?
- Case study: Stary Browar, Poznan, Poland – from brewery to a special kind of shopping centre

**16:45 PROF. DRS R.P. VAN DER KIND, UNIVERSITY
OF AMSTERDAM, FACULTY OF ECONOMICS**

Rising to the retail challenge

- Insights into the past and consequences for the future
- Secrets of success for retailers
- What are the drivers for future success of demand oriented retailers?

17:15 COCKTAIL RECEPTION

18:30 SEMINAR CLOSES

DAY TWO – FRIDAY 4 NOVEMBER 2005

RISE TO THE RETAIL CHALLENGE | SHOPPING CENTRE TOURS

Gropius Passagen – Refurbished and extended to become Germany's third largest shopping centre in 2002, this centre features more than 180 shops on 85,000m² including a fitness centre and UCI multiplex cinema.

Potsdamer Platz Arkaden – Uniquely located at the Potsdamer Platz, in the heart of the capital, this centre opened in 1998 and features 120 shops.

East Gate – Peek & Cloppenburg, H&M, C&A and a Saturn consumer electronic market are among over 150 shops to be opened in this new shopping centre in the east of Berlin in the autumn of 2005.

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ICSC Europe reserves the right to alter the venue and/or the speakers.

BOOK ONLINE AT: WWW.ICSC.ORG/2005ERC BOOK BY FAX: +44 20 7931 7628

Today's retail industry is facing constant change in consumer behaviour. What do the consumers of tomorrow expect? How can they be challenged? And how can you do your part to research and meet your customer's need in order to run a successful shopping centre?

The seminar will focus on the many applications of research, using real case studies from industry professionals. It will explore how they use research information to determine investment location strategy, the design and shape of a shopping centre, to assess the value and role of leisure in shopping centres, the future success of a global retail business and in the acquisition of shopping centres. Global trends likely to impact local retail property markets will be examined. There will be opportunities to hear from and to meet with research practitioners and retail property experts from all corners of Europe.

WHO SHOULD ATTEND?

- Shopping centre and retail researchers and information managers
- National government agencies and advisers with a strategic interest in European retail extension
- Local and regional government agencies with responsibility for strategic planning and land use
- Investors and developers
- Anyone who uses, or is interested in, research on European shopping centres and their customers, including retailers and leisure operators

WHY ATTEND?

- Be part of the debate about the future of European shopping centre research
- Understand the consumer economy: see where the retail movement is going
- Take part in a discussion about the future role of leisure within your shopping centre
- Network with your fellow delegates and establish new contacts to explore new business opportunities
- Take away valuable new ideas, good practice tips and benchmarks applicable for use in your own marketplace

PROGRAMME PLANNING COMMITTEE

This programme has been developed by researchers, for researchers. Led by the Chairman, Ralf-Peter Koschny from BulwienGesa AG, the committee is: Yvonne Court, Cushman & Wakefield Healey & Baker, Rafael Pelote, Sonae Sierra and Jos Sentel, ING Real Estate.



“**Fantastic presentation** from Manuela Sacco of Envirosell Europe on consumer behaviour. She established a contact with Paco Underhill, founder of Envirosell Inc. and author of famous books *Call of the Mall* and *Why we buy* who is now coming over to Sweden to visit our Täby Centrum Shopping Centre. Attending the seminar was **very worthwhile** for me!”

Mats Carlo, Head of Marketing and Research at Rodamco in Sweden

Sponsors



This event has been organised with the support of

AM Development, Netherlands; **BulwienGesa AG**, Germany; **Cushman & Wakefield Healey & Baker**, UK; **German Council of Shopping Centres**, Germany; **ING Real Estate**, Netherlands; **The Retail Consulting Group**, France

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RISE TO THE RETAIL CHALLENGE – REGISTRATION FORM

5TH ICSC EUROPEAN RESEARCH SEMINAR | 3-4 NOVEMBER 2005, WESTIN GRAND, BERLIN, GERMANY

THREE EASY WAYS TO REGISTER**Online:** www.icsc.org/2005ERC**Fax to:** +44 20 7931 7628**Post to:** International Council of Shopping Centers/Europe LLC,
1221 Avenue of the Americas, New York, NY 10020-1099,
USA. Tel: +44 20 7931 7026**REGISTRATION FEES****Member**

Before 8 October €365 + €58.40 VAT = €423

After 8 October €465 + €74.40 VAT = €539

Non-member

Before 8 October €515 + €82.40 VAT = €597

After 8 October €615 + €98.40 VAT = €713

Next generation

Before 8 October €300 + €48 VAT = €348

After 8 October €400 + €64 VAT = €464

Group discounts

For bookings of more than three delegates, paid for and submitted together, there is a 10% discount.

DELEGATE DETAILS ICSC Member Non-member Next Generation

Title _____ First name _____

Surname _____

Position _____

Company name _____

Type of business _____

Address _____

City _____ Postcode _____

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Telephone number _____

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(for seminar correspondence)

ICSC Membership number _____

ICSC MEMBERSHIP

To qualify for the discounted membership fee, each registrant must be an ICSC member. See separate form for details and application for becoming a member of ICSC.

TRAVEL AND ACCOMMODATIONYou are responsible for your own travel and accommodation. If you would like to stay at the seminar venue for the specially negotiated rate of €166 including breakfast, reserve your room directly with the hotel quoting ICSC. Westin Grand Berlin, Germany
Telephone: +49 30 2027 3420 Fax: +49 30 2027 3419
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Please make cheques payable to International Council of Shopping Centers/Europe LLC and enclose with your completed registration form.

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For information on registration and membership please contact the ICSC Europe team on +44 20 7808 7026 or icsc.europe@icsc.org

Deadlines

To qualify for the advanced registration discount, book by 8 October 2005. For your name to appear in the main list of delegates, we must receive your registration by 27 October 2005.

Next Generation

Members may nominate a colleague (less than 5 years in the industry) to join them at the seminar for a favourable rate. Tick Next Generation on this form to apply.

Cancellations/substitutions

Fees will be refunded in full if cancellation is received by 30 September 2005. 50% refund only on cancellations made between 30 September 2005 and 21 October 2005. No refunds after 21 October 2005. All requests for refunds must be made in writing. Substitutions can be made at any time.

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