

ZONING **PRACTICE**

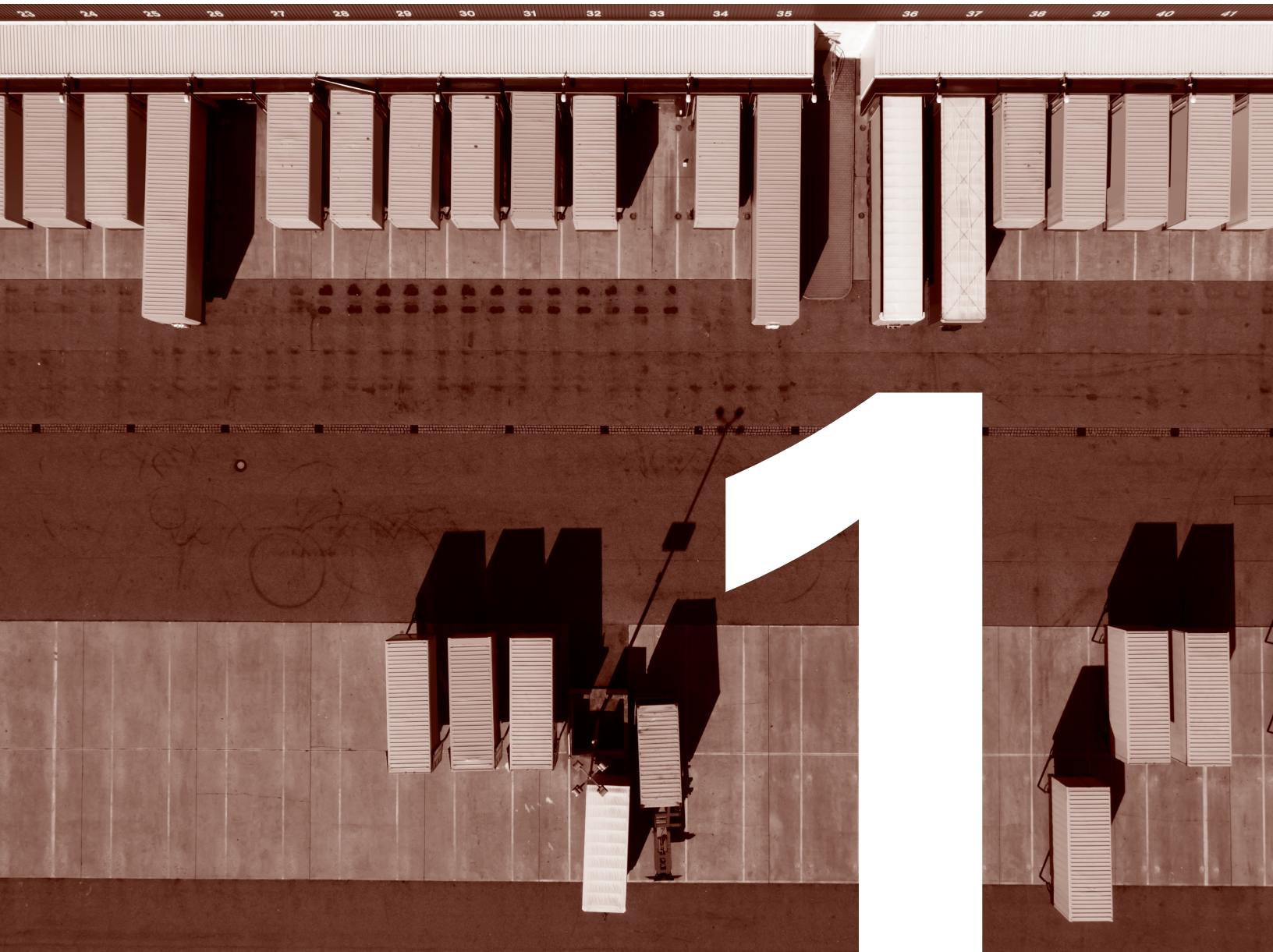
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PRACTICE **E-COMMERCE**



E-Commerce and the Future of Land Use

By Rick Stein, AICP

INTRODUCTION

Do you remember the halcyon days of internet shopping before it was called e-commerce? It was back when you discovered that you could browse the aisles of a store for the product you want, then go home, launch your dial-up AOL connection on your hulking Gateway computer, and search the internet to order the exact same item you saw in the store, for much less—and with no sales tax! Boy, that was fun. Sure, it felt a little wrong. Those stores had bills to pay – the lease, the lights, payroll, etc.—and by skipping out on the sales tax you were denying revenue to some place that counted on it to pay for niceties like roads and sidewalks. But you didn't care. You were going to save \$300 bucks on that TV, and it was going to be delivered directly to you! This was incredible and, in many ways, life-changing for most consumers. Ah, those were the days.

Things are much different now. The retailers' war on price is over. The next battle for the hearts and minds of consumers is over *time*. In the race to deliver goods to consumers at an ever-increasing rate, retailers such as Amazon and Walmart are upping the ante and promising to deliver goods within one day, the same day, or within a few hours. The endgame will ultimately result in the delivery of virtually *all* goods within one hour or less. This will be accomplished by leveraging the existing real estate assets (stores) and transportation network (roads and sidewalks), while implementing new technologies such as autonomous vehicles, artificial intelligence, blockchain, and robotics.

This shift to the domination of delivery will continue to have a major impact on zoning and land use. In most cases, cities are ill-prepared for this level of disruption. Existing zoning codes, many of which were written for a "simpler" time, are inadequate and may allow undesirable uses to proliferate or prevent small businesses from competing in the modern marketplace. No part of the city or countryside will be untouched. Basically,

the next generation of the fulfillment center already exists—it's the store next door and the delivery truck on your street—it's the Ama-zōning of America. This edition of *Zoning Practice* looks at the past, present, and future of e-commerce, and outlines how the emerging intersections of the technological and urban landscapes may require a fundamental rethinking of zoning and land use at the local level.

WHAT IS AMA-ZŌNING?

Amazon was founded in 1994 by a little-known hedge fund manager named Jeff Bezos. If you are of a certain age you will recall Amazon was only an online retailer of books. That was it—books. Why books? The answer is pretty simple. Demand for books was historically high. A single book does not take up a lot of space but collectively, thousands of books do. No single bookstore could possibly afford the amount of real estate required to stock one or more copies of the millions of books that have been written over the last 2,000 years. Books are also something that you don't necessarily need to see, hold, and feel before purchasing. Books represented a relatively inexpensive market to conquer—and conquer it Amazon did. In 1994, there were over 12,600 bookstores in America. Today that number is down to 6,600—a decline of almost 6,000 or 47 percent (U.S. Bureau of Labor Statistics).

In 1997, Amazon opened its first remote distribution center and added one-click ordering to speed checkouts and reduce the number of abandoned orders—a problem in the emerging world of e-commerce. By 1998, Amazon had expanded beyond books to include music and DVD/video sales (Sherman 2015). In a fascinating interview with CNBC in 1999, Jeff Bezos clearly lays out the future of Amazon. The interviewer presses Bezos on the reality that Amazon is not actually a "pure" internet company because of their "millions and millions" of square feet of real estate in the form of warehouses and distribution centers. Bezos explains that

the warehouses and distribution centers are where they are, because "it allows us (Amazon) to get the product close to the customers, so we can ship it to customers in a very timely way. . . ." The interviewer later states there does not appear to be much of a difference (in terms of company vision and strategy) between Walmart and Amazon, to which Bezos emphatically agrees (Malter 2019).

There it is. The whole ballgame. Ironically, Bezos and Amazon knew more about Walmart's potential e-commerce advantage (due to their existing real estate) than Walmart itself did. In a 2019 interview with FreightWaves Radio on Sirius XM's Road-Dog channel, Chris Sultemeier, the former executive vice president of logistics for Walmart, stated that it wasn't until around 2004 or 2005 when Walmart realized the value and role their existing stores could play in competing against Amazon. Since the mid-2000s, the Walmart and Amazon business models have steadily converged, and the "Ama-zōning of America" is well underway.

The War on 'Time' and The Role of Technology

The war on time refers to the fight between retailers to deliver goods to consumers in as little time as possible. Retailers have learned that minimizing the distance from product storage to consumers' doorsteps is the best way to decrease the time needed to complete a delivery. Amazon's Prime and Prime Now services, their acquisition of Whole Foods, and partnerships with Kohl's and Rite Aid are all strategies that demonstrate how important "time" is in this new era of retailing. Until someone invents a *Star Trek*-esque transporter, or delivery drones aggressively take over our skies (which should keep you up at night), goods originating from physical real estate located close to consumers, utilizing our roads (and even sidewalks), will be how and where the "war on time" is fought.

Although *Star Trek*'s transporter technology may be decades or centuries away,

the impact of technology on this new era of retail cannot be understated. Just think about all the recent supply chain innovations abetted by technological advancements in robotics and autonomous vehicles. There are autonomous dump trucks carrying raw materials out of mines. There are autonomous tractors roaming farm fields all over the world. Fully autonomous and semiautonomous tractor trailers move raw materials and finished products from one supply chain node to the next. Robots assemble goods and stock warehouse shelves. Consumers click a button on their phone to order goods. Robots retrieve those goods and assemble entire orders.

As companies continue to test autonomous delivery to homes and businesses, complete automation of the entire supply chain, although rare, is possible today. The most expensive line item for most businesses is labor. If capital investments in technologies represent the clearest path for a business to reduce their labor costs, we should assume this will happen.

It is not difficult to comprehend how an autonomous fulfillment operation would be more efficient than having one or more humans running around a warehouse looking

for an item on a shelf. What may be less clear to the average person is the role that data and data processing is playing and will continue to play in the Amazoning of America. Blockchain technology, artificial intelligence, and advancements in data processing power and capacity, all have the potential to dramatically reduce the data processing “friction” associated with moving goods along the entire supply chain. Understanding how this technology works is not nearly as important as understanding what it will facilitate, which is a veritable free flow of goods from node to node along the supply chain. This high-level data analysis and algorithmic decision making allows retailers to predict with a high amount of certainty how much and what kind of inventory is needed on a daily, even hourly basis. For the consumer, this means that Amazon might know what you will buy next before you place the order, making it that much easier for them to send it to you faster.

The Future of Fulfillment

The term “fulfillment” conjures up images of sprawling warehouses with row upon row of multiple levels of shelving supporting goods as common as toothpaste and soap,

as well as more obscure items like robotic vacuums and oriental rugs. For all intents and purposes, it was Amazon that thrust the term “fulfillment” into the American lexicon. Large fulfillment centers of the type we associate with Amazon are typically located in semi-industrial transitional areas between urban and rural in places where land is (relatively) cheap and highway access is plentiful. There are several current examples of large fulfillment centers finding their way into urban places. According to Merriam-Webster, fulfillment is defined as “the act or process of fulfilling” or “the act or process of delivering a product to a customer.” However, by definition, the stores we shop at every day, both big and small, are de facto fulfillment centers. The primary difference between a typical grocery store and an Amazon fulfillment center (besides its sheer size) is the primary method in which the goods arrive at the consumer’s home, though even that distinction is rapidly changing.

To understand how this new world of retail will impact our places we first need to reorient ourselves as consumers and residents. Today, it is primarily the consumers that are completing the last two nodes of the supply chain, commonly referred to as



Maryland GovPics, Flickr (CC BY 2.0)



A large fulfillment center in Baltimore.

the “last mile.” The “origin node” refers to the store where the goods are located. The “destination node” refers to the consumer’s home, place of business, or wherever the goods will ultimately reside. In a world where consumers can push a button on their phone and have goods from one or more stores arrive at their home in one hour or less, the “last mile” is likely to be completed by a delivery vehicle, either under the control of a human or autonomous vehicle. This has some obvious implications for our transportation network in the form of delivery vehicles on our streets. Less obvious may be the impact on places like shopping centers, regardless of their size or their location, or the impact on housing.

ZONING AND LAND-USE CONSIDERATIONS

Zoning and land-use considerations generally have their foundations built on what we know or what we think will happen. Our knowledge of history provides the framework for recommendations and implementation. So how do we plan for the future when so many of our experiences are no longer applicable?

Shopping Centers

The International Council of Shopping Centers (ISCC) has five classifications for general purpose shopping centers: Strip/Convenience, Neighborhood Center, Community Center, Regional Mall, and Super-Regional Mall. These exist across America in rural, suburban, and urban contexts, though most of these tend to be concentrated in suburban locations. It is not just shopping centers that will be impacted by this new era of retail. Stand-alone businesses including traditional “Main Streets” are poised to be disrupted as well. What we are witnessing is not simply the impact of e-commerce. In fact, e-commerce is only one piece of the equation. The amount of real estate dedicated to retail is, by many estimates, vastly overbuilt. Further, e-commerce alone is likely not the future of retail. Instead, the future of retail is more likely “omnichannel” in nature and an omnichannel approach to retail can be applied to any form of shopping center or stand-alone store, in any context.

Let’s define exactly what omnichannel retail is and how this could impact land use and zoning. Omnichannel is simply a term that implies whatever you are doing, you are using multiple sales “channels” to do

it. In retail, that might mean you have one or more physical stores and you engage in e-commerce through your website, mobile app, Amazon store, or likely all the above. The idea is to provide a consistent experience to the consumer, whenever and wherever they want. Omnichannel retail represents the next generation of e-commerce. The online retail industry is now mature to the point where we are talking about the next generation because many online retailers have learned that online-only sales are not enough. Sure, there are still plenty of pure e-commerce companies that only sell products on the internet, but increasingly those formerly “pure” e-commerce businesses are adopting a brick-and-mortar presence, and vice versa.

This convergence of business models or “evolution” of retail seems remarkably familiar to the business strategy convergence of Amazon and Walmart that we mentioned earlier. This is significant because it represents the survivalist behavior deemed necessary to remain relevant in the short to medium term. As for the long term, who knows? For now, retailers, restaurants, and even services such as personal trainers and cleaning services will increasingly be leveraging the power of the internet to expand their reach and build their brand. This is great news for retail real estate, since it means that there is still a prominent role for physical stores in this new world of retail. However, this good news is unlikely to be evenly distributed across the retail landscape. Not all buildings were created equal, and it is *location* that may be the greatest predictor of future land use.

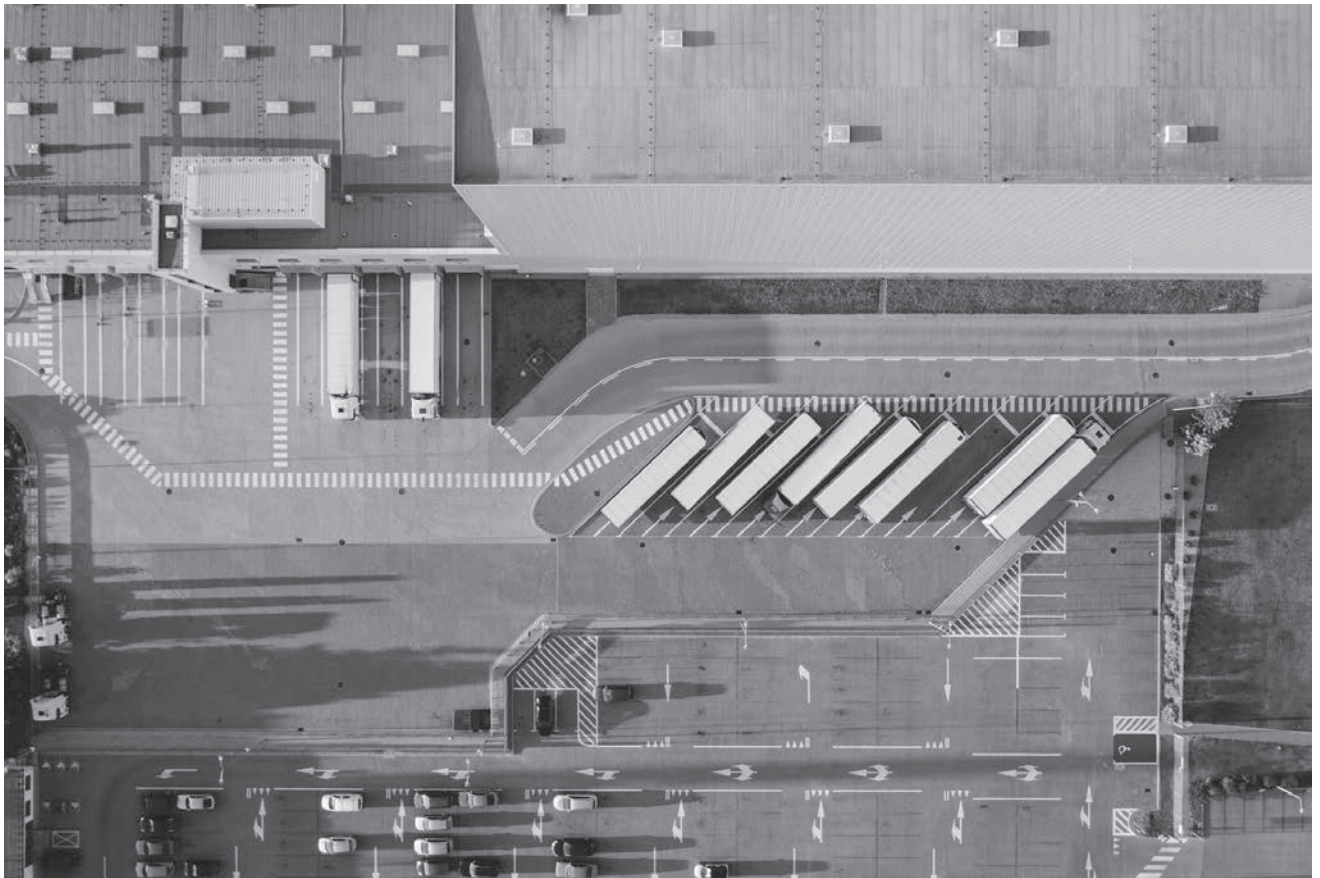
Remember those ISCC shopping center classifications? There are more 32,000 “Neighborhood Center” shopping centers in the United States, representing approximately 30 percent of the shopping center industry. These range in size from 30,000 to 125,000 square feet and are typically anchored by a grocery store. These exist primarily in the suburbs, but they are also prominent in rural and semirural locations. In these locations, you typically find these on the periphery of town surrounded by either farmland or relatively new housing. In suburban locations, the newer ones are likely to also be found on the exurban fringe, but older ones that were developed at the same time the suburbs were exploding are now

surrounded by low-density housing. In either context, they are primarily car dependent.

Car dependency begets a lot of things, not the least of which is an overabundance of parking. Parking is the number one development constraint in any context. In fact, the actual buildings—which generate revenue—typically only comprise between 15 and 20 percent of a shopping center’s footprint. So-called “peak demand” is rarely met, if at all. The shopping center’s site design already has considerations for deliveries and circulation at the rear of the building. What takes place in front of the store is almost solely to accommodate the customers.

One of the questions we need to ask is, “How much less parking is required if a certain percentage of the customers no longer complete the nodes of the last mile themselves, and opt instead for the delivery of those goods?” From a zoning and land-use perspective, some will be quick to see this as an opportunity for redevelopment of an increasing oversupply of parking. This is playing out today across the country and has been codified in books such as the *Sprawl Repair Manual*. Most of these retrofits either develop housing or mixed uses in areas formerly devoted to parking. Sometimes the wholesale demolition of a portion of the shopping center is part of the project. Each of these scenarios assumes retail will carry on as usual, albeit to a lesser degree. So what happens when some or all of the shopping center’s units function in part, or primarily, as fulfillment centers in which the goods are delivered to the customer as opposed to the customer driving to the store and retrieving the good themselves?

On the one hand, living or working near a shopping center where delivery vehicles are in a constant state of ingress and egress may not seem desirable. On the other hand, how is this much different than consumers using their personal vehicles to do the same thing? From 10,000 feet, the transportation gymnastics look the same. The question revolves around the intensity and frequency, which is why zoning exists. From a land-use perspective, is there any discernible difference between stores functioning in part or primarily as fulfillment centers? The taxable revenue generated from these stores is likely to be as high or greater than those still employing a traditional retail model. Zoning



Sprawling distribution and fulfillment centers have far different transportation and access needs when compared with existing shopping centers.

questions revolving around intensity and frequency are another issue.

Zoning for fulfillment and distribution centers usually falls under some industrial category, primarily due to the location and the intensity of the uses. These sites are generally large, sprawling complexes with 24-hour activity and delivery vehicles that range in size from 18-wheeled tractor trailers to cargo vans. The ceilings tend to be high to allow for stacking of pallet upon pallet of goods. A shopping center is configured much differently because 1) the market dictated it and 2) planning and zoning demanded it. In the future, the “market” may require higher ceilings and more expansive rear parking and circulation to facilitate higher delivery volumes, but maybe not.

Consider the typical grocery store. The average grocery store is approximately 45,000 square feet. The amount of space

dedicated to storage and offices tends to amount to 20 to 30 percent of a store’s footprint. That means 70 to 80 percent of the store is where the actual shopping takes place. Imagine that allocation of space is flipped and now most of the space is used for storage and the aisles are relegated to fresh foods such as meats and produce. Today, there are robotic fulfillment systems such as Ocado that could be customized to fit within an existing store’s building envelope and optimize the amount of goods that could be stored and efficiently retrieve and assemble orders. In this case, the existing zoning classifications for retail may suffice. In other words, the form doesn’t disproportionately limit the function or affect a place’s physical design and character. The same may be true with respect to deliveries.

Although “Neighborhood” shopping centers represent the bulk of the centers that

will likely be affected by the Ama-zōning of America, they are not the only ones. There are more than 9,700 “Community Centers” in the United States, or roughly one-third the amount of Neighborhood Centers. These range in size from 125,000 to 400,000 square feet sprawling across 10 to 40 acres. This is generally where the big box stores are located and because of this, they are likely better prepared for this new era of retailing. These are located almost exclusively in suburban environments and are thus auto dependent. In this context, we should not be overly concerned about conforming to existing zoning codes because the building form is already adaptable to the new business model. Instead, we should focus on the opportunities inherent in the overabundance of parking. This line of thinking is also applicable to buildings in the “Malls” and “Super-Regional Malls” categories, which are a dying breed.

Main Street and Local Shopping

The two remaining shopping classifications, “Strip or Convenience” and “Main Street/Stand Alone” retail, are perhaps the most interesting subjects. There are more than 69,000 Strip or Convenience shopping centers in the United States. These centers have an average size of 13,000 square feet and can be as large as 30,000 square feet. They usually take up less than three acres and have compact trade areas that amount to a three-minute drive time. They exist in urban, suburban, and rural contexts. They are not always pretty but they are very profitable and tend to have few vacancies. Their tenants are usually locally owned, which is a sharp contrast with the tenants that generally inhabit a Community Center. Similarly, stores commonly part of the Main Street category tend to be private or locally owned. These two types of destinations will not be immune to the pressures exerted by omnichannel retail. To compete, many, if not most of them will have to focus on two things—the shopping experience and deliveries.

A traditional Main Street already has a collective advantage with respect to the shopping experience. Their relatively dense form lends itself to things like spillover traffic and longer shopping engagements. Strip or Convenience centers have a loyal customer base that is primarily local. Here, the experience takes a back seat to convenience. In both cases, the building form is not likely to change, but the intensity could increase with increasing demand for deliveries. This is also true for stand-alone buildings such as chain store pharmacies like Walgreens and CVS; however, these stores may face a radical shift in the coming years.

None of the Above

In April 2019, Amazon announced free one-day shipping for their Amazon Prime members. Less than three weeks later, Walmart countered with a next-day delivery option. Not to be outdone, two months later Target announced a same-day shipping option. We could go on and on, but you can see where this is headed—eventually, most major retailers will provide an option for same-day delivery and in some cases, delivery in an hour or less. This is where a stalwart like Walmart would appear to have an advantage over Amazon because Walmart is already closer to the consumer.

In fact, there is a Walmart within a 15-minute drive of 90 percent of the households in the country. If Amazon is going to deliver on their promise of one-day shipping, a couple of things are likely to happen. First, the depth and breadth of items eligible for Prime are likely to be reduced, at least in the short run. Second, by some estimates, Amazon will have to build an additional 340 to 360 “delivery stations” or fulfillment centers across the country. That’s a lot of additional real estate and that’s just to achieve the next-day delivery promise. How might Amazon compete against retailers that can promise same-day or one-hour delivery? There are two conceivable options—build large fulfillment centers on land formerly occupied by higher intensity uses such as malls and community shopping centers or acquire or establish partnerships with existing retailers such as Walgreens or CVS.

In Cleveland, two suburban malls have been demolished and replaced with Amazon fulfillment centers. The Randall Park Mall was located in North Randall, Ohio, about 15 miles southeast of Cleveland. In September 2018, a new Amazon fulfillment center opened on the land formerly occupied by the old mall. One year later, Amazon opened a fulfillment center at the site of the old Euclid Square Mall approximately 13 miles northeast of Cleveland. In both cases, the zoning changed from retail to light industrial because the primary form, function, and intensity radically changed.

Amazon is likely to engage in similar redevelopment projects as they creep closer to consumers, but there are not enough similar opportunities to facilitate their ambitions today or in the future. Instead, a more likely scenario is expansion via mergers and acquisitions. Amazon’s acquisition of Whole Foods in 2017 represented the opening salvo. There will be more.

If you’re Amazon, you know that you must get the goods closer to the consumer (the origin node of the last mile) if you plan to compete with existing, physical stores that offer rapid delivery. To that end, it makes sense to acquire one or more retailers with extensive real estate holdings in neighborhoods across the country. Theoretically, overnight Amazon could more than compete with Walmart (and many others) on *time*. Whether or not there are zoning implications depends in large part on exactly

how this is implemented. For example, if these newly acquired stores are turned into micro-fulfillment centers and have few if any forward-facing customer components, there indeed will be issues related to the intensity and frequency of the use.

Admittedly, this scenario is highly speculative and contains many assumptions, but based on what has occurred just in the last two years in the retail and grocery sectors, it would be naive to think that the fight over “time” is close to ending.

TOUGH CHOICES

Throughout history, civilization has always developed around commerce and the primary transportation modes du jour. The first signs of the weakening of this relationship were evident in the early stages of suburban development; the role of the car in suburban development changed everything. It didn’t just change what was physically possible—separating low-density, single-family housing from relatively low-density shopping centers. It changed the psychology. Similarly, the Amazoning of America may end up being as much about changes in consumer/citizen psychology as it is a shift in what is physically possible.

There are several forces at play that are both competing and aligned with standard planning practice. So much so that it might be a good idea to take several steps backward and view things through a different lens. Take the example of the two malls in Cleveland that have been redeveloped as Amazon fulfillment centers. In each case, an area was rezoned from retail to light industrial to legally accommodate the new use. It is perhaps too early to identify the impact the change in zoning has on the adjacent communities, but could it be any more significant than the decades-long impact the malls have had on these communities’ economies? As of this moment, the zoning change was simply a formality.

For areas like shopping centers that are in part seeing or expected to see a transition from destination to origination, a change in zoning may or may not be necessary. Much of this depends on how the community wants to move forward. As stated earlier, the greatest impact on the physical implementation of places like shopping centers is the design (ingress, egress, and circulation) of the backsides of the building(s) and the amount of parking allotted for customers. If

the existing zoning allows for the wholesale redevelopment of parking, then a change in zoning may be unnecessary. Expect citizens to want to have their cake and eat it too. In other words, there will be market pressures to facilitate “origin nodes” in all contexts (urban, suburban, and rural) and within the neighborhoods. Households may love the idea of one-hour, push button delivery, but are they willing to allow the 10,000-square-foot corner pharmacy to be reimaged as a micro-fulfillment center? Property values are likely to be positively correlated with proximity to origin nodes, although it is likely that unless you live on a farm, you will be within a one-hour delivery zone of one or more retailers. Perhaps the risks of prohibiting these uses outweighs risk to neighborhood character, especially around shopping centers where the character wasn’t that great to begin with and the use was already segregated from the surrounding neighborhoods.

The toughest choices may revolve around the management of delivery vehicles on our streets and in the sky. Further, much like food trucks have taken advantage of the existing infrastructure to take the product where demand is the highest and simultaneously avoid paying rent for a fixed asset that may or may not optimize revenue, we can expect retail to do the same.

In fact, Amazon is already doing that today with its Treasure Truck, which roams the streets today in 30 U.S. cities—selling a single “deal of the day” at multiple locations in each city. Technology makes this possible, but our roads and parking enable it. The execution of the concept may be a bit clunky, but competition is sure to follow. Remember, it’s all about *time*. The easiest way to win the war on time is to get the products closer to the consumer to begin with.

If U.S. retail really is overbuilt by as much as 50 percent, then we should expect some of these places to gain a new life or be demolished entirely. Expected gains in supply chain and logistics efficiencies will put even more pressure on an already overbuilt retail stock. Those that survive will be capable of adapting to the varying intensities of the hybrid retail/fulfillment center.

The share of existing retail that is capable of adapting is unknown, but don’t expect a one-to-one replacement. This could result in a lot of nonretail uses filling all that empty space.

A zoning change should be considered only if the existing zoning prohibits uses like housing, office, or institutional. If one or more units in a shopping center no longer require a certain amount of visibility, then the redevelopment of parking as an economically productive land use or greenspace should be made easier.

There is always the choice to do nothing. If a store sat vacant for several years but is now functioning as a local micro-fulfillment center, is that a bad thing? It wasn’t generating revenue before and was not positively contributing to the character of the area, much less supporting the surrounding property values.

CONCLUSION

The intention of this article was not to supply you with all the answers because in most cases, there simply aren’t any—yet. Technology is not a fixed asset and thus can change rapidly. Real estate, on the other hand, is the opposite of that. Expect the Amazons and Walmarts of the world to push for, and gravitate to, places where a great deal of flexibility exists. Ultimately, accommodating this new retail model may prove to be less about zoning and more about transportation. So that begs the question: Is it time to zone the streets?

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