THE "INFORMATION REVOLUTION"

Historic Event or HYPE?
HISTORIANS HAVE FOUND THAT TECHNO-ECONOMIC REVOLUTIONS TAKE A LOOOOOONG TIME!
3 STAGES OF TECHNOLOGIC DEVELOPMENT

1st 25 YEARS – Introduction (or “Infancy’)
The technology is economically non-productive.

2nd 25 YEARS – Development (or “Adolescence”)
The technology is economically counter-productive.

3rd 25 YEARS – Assimilation (or “Maturity”)
The technology is economically hyper-productive.
3 STAGES OF TECHNOLOGIC DEVELOPMENT

1\textsuperscript{st} 25 YEARS – Introduction (or “Infancy’)
The technology is economically \textit{non-productive}.

FOR THE COMPUTER – 1946 to 1971

2\textsuperscript{nd} 25 YEARS – Development (or “Adolescence”)
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FOR THE COMPUTER – 1971 to 1996

3\textsuperscript{rd} 25 YEARS – Assimilation (or “Maturity”)
The technology is economically \textit{hyper-productive}.

FOR THE COMPUTER – 1996 to 2020
## SIGNS OF WATERSHED CHANGE

### Average Annual U.S. Productivity Improvement Rates

<table>
<thead>
<tr>
<th>Period</th>
<th>U.S. Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1974 - 1994</td>
<td>1.4%</td>
</tr>
<tr>
<td>1995 - 1999</td>
<td>2.5%</td>
</tr>
<tr>
<td>2000 - 2004</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

### Average Annual Inflation Rates

<table>
<thead>
<tr>
<th>Period</th>
<th>U.S. Rate</th>
<th>World Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990 - 1994</td>
<td>3.6%</td>
<td>30.4%</td>
</tr>
<tr>
<td>1995 - 1999</td>
<td>2.4%</td>
<td>8.4%</td>
</tr>
<tr>
<td>2000 - 2004</td>
<td>2.2%</td>
<td>3.9%</td>
</tr>
</tbody>
</table>
The “Information Highway” is Completed

The railways (built after 1825), were the enabling infrastructure for the steam engine (patented in 1776), and until power distribution grids were built (beginning in 1905), the electric dynamo (invented in 1871), remained a technical novelty. The addition of color, graphics and data transmission in 1994 transformed the Internet into the World Wide Web, the infrastructure – or Info-Structure – for the computer, and the crucial enabler of the information economy.
THE WEB AT WORK

• Frictionless transactions
• Paperless procurement (B2B/B2G)
• Web phoning/VoIP
• Grid computing
• Information utilities
• Virtual travel/Tele-commuting
• Distant learning
• Wireless Web access (Wi-Fi/WiMax)
• Peer-to-Peer (P2P) groupware
3 STAGES OF TECHNOLOGIC DEVELOPMENT

1st 25 YEARS – Introduction (or “Infancy”)
The technology is economically non-productive.

FOR THE COMPUTER – 1946 to 1971

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The technology is economically counter-productive.

FOR THE COMPUTER – 1971 to 1996

3rd 25 YEARS – Assimilation (or “Maturity”)
The technology is economically hyper-productive and transformational!

FOR THE COMPUTER – 1996 to 2020
COASE’s LAW:

“The cost of gathering information determines the size of organizations.”

Professor Ronald Coase
College of Economics and Commerce,
Dundee, Scotland – 1931

Throughout most of the 20th Century, inter-organizational communication was slow, expensive and unreliable, leading most large organizations to be self-sufficient. But, as the Internet has made communications fast, cheap and convenient, large enterprises are outsourcing non-critical overhead activities to superior specialist suppliers, while concentrating resources and management attention on their core competitive competencies.

Dr. Coase was awarded the 1991 Nobel Prize in Economics for his 1931 insight, and the resulting notoriety helped launch the outsourcing revolution.
BECOMING AN “EXTRA-PRENEURSHIP”

1. Outsource the things that you ARE NOT particularly good at to people who ARE: “specialists”

2. Focus freed-up resources and management attention on your core competencies – the things you do well

3. Collaborate on-line with your contract partners to create a virtually integrated network of superior performers

4. Collaborate on-line with your customers/constituents to improve all aspects of your performance
Worldwide, private and public enterprises are becoming hyper-productive by

• Abandoning Vertical integration. . .
Worldwide, private and public enterprises are becoming hyper-productive by

• Abandoning Vertical Integration. . .

• . . . for Virtual Integration,
Worldwide, private and public enterprises are becoming hyper-productive by

- Abandoning Vertical Integration. . .
- . . . for Virtual Integration,
- because Adam Smith was right;

“Specialists always outperform generalists!”
## Staffing the Virtual Enterprise in 2015

(after 2 decades of outsourcing & franchising)

<table>
<thead>
<tr>
<th>Domain</th>
<th>% of Total Workforce</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In-House</strong> (Core functions/competencies)</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Out-Sourced</strong> (Complementary Competencies)</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Contingent</strong> (Commodity Competencies)</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Self-Employed</strong> (Special Competencies)</td>
<td>15%</td>
</tr>
</tbody>
</table>
The 1948 General Agreement on Trade & Tariffs

The WorldWideWeb becomes the single international info-structure linking the world’s businesses in 1994

Voice over Internet Protocol that is currently integrating the world’s telephone and cell phones with the WorldWideWeb

. . . . a single electronic marketplace where 1/3 of the world’s population and ALL of the world’s businesses will be able to engage in commerce by 2012 – 2013

The Global Village . . . .
THE OUTLOOK FOR U.S. BUSINESS AND EMPLOYMENT

Six Scenarios of the Decade Ahead • 2005 to 2015


The 21st Century at Work: Forces Shaping the Future Workforce and Workplace in the United States, Rand Corporation, 2004


The Substance of Style: How the rise of aesthetic value is remaking commerce by Virginia Postrel, Harper Collins 2004

THE FUTURE OF THE AMERICAN WORKPLACE

SIX SCENARIOS – ONE COMMON VISION

1. All six scenarios assume that the dis-aggregation of large, integrated industrial era businesses will continue until all big firms become dispersed, virtually-integrated extra-preneurships.

2. All six scenarios assume that the economy of the future will be global.

3. All six scenarios assume that work in America during the next 10 to 15 years will be characterized by:

   • Higher turnover

   • Reduced job security

   • Diminished Benefits and

   • Profits-based compensation . . .

   . . . as ferocious international competition in an increasingly tariff-free global economy drives labor markets worldwide to pay “comparable wages for comparable work.”
This moment in time . .

History indicates that our transitioning industrial economies will eventually create a large new class of middle-income jobs.

BUT, this has not yet begun to happen!

Until it does, automation, info-mation, outsourcing and off-shoring will continue to reduce the numbers of middle-income jobs in Europe, North America & Japan.
WELCOME TO REVOLUTIONARY TIMES!
Historically, rising tides of technology-based productivity improvement that lift all boats have been preceded by what economist Joseph Schumpeter once described as:

“a wave of creative destruction. . .”
"a wave of creative destruction..."

Joseph Schumpeter
*Business Cycles* –1939

Changing Make-Up of the Transitional Job Market

1980 to 2020

©1988 David Pearce Snyder • The Snyder Family Enterprise • www.the-futurist.com
## Share of Total U.S. Job Growth

(21.3 million new jobs - 2002 to 2012)

<table>
<thead>
<tr>
<th>Share of Job Growth</th>
<th>Type of Enterprise</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.7%</td>
<td>Education</td>
</tr>
<tr>
<td>9.8%</td>
<td>Retail Trade</td>
</tr>
<tr>
<td>8.9%</td>
<td>Ambulatory Care</td>
</tr>
<tr>
<td>8.7%</td>
<td>Professional, Technical &amp; Scientific Services</td>
</tr>
<tr>
<td>8.3%</td>
<td>Employment Services</td>
</tr>
<tr>
<td>6.3%</td>
<td>Eating &amp; Drinking Establishments</td>
</tr>
<tr>
<td>4.8%</td>
<td>Construction</td>
</tr>
<tr>
<td>4.5%</td>
<td>Finance, Banking &amp; Insurance</td>
</tr>
<tr>
<td>4.4%</td>
<td>Nursing &amp; Residential Care</td>
</tr>
<tr>
<td>4.3%</td>
<td>Transportation &amp; Warehousing</td>
</tr>
<tr>
<td>4.2%</td>
<td>Social Services</td>
</tr>
<tr>
<td>3.6%</td>
<td>State, Provincial &amp; Local Government</td>
</tr>
<tr>
<td>3.1%</td>
<td>Hospitals</td>
</tr>
<tr>
<td>3.0%</td>
<td>Wholesale Trade</td>
</tr>
<tr>
<td>2.8%</td>
<td>Religions, Civic, Non-Profit</td>
</tr>
<tr>
<td>11.6%</td>
<td>All other Enterprises</td>
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5 SUSTAINING MARKETS FOR INDUSTRIAL AND OFFICE PROPERTIES IN REVOLUTIONARY TIMES

1. Medicine and Healthcare
   The “driving economic engine" of aging societies

2. Education
   Retooling human resources for post-industrial work

3. Government and Non-Profits
   Growing Public-Private Collaboration

4. Facilities Management
   Their overhead = your core competency

5. Recycling Industrial Era Cities
   Cashing out and filling in
AGE COMPOSITION OF THE ADULT POPULATION
FOR THE UNITED STATES AND FOR CANADA
1950 - 2015
THE DEMOGRAPHIC DECADE AHEAD

A Slower-Growing, Older, More Diverse U.S. Workforce

<table>
<thead>
<tr>
<th>Category</th>
<th>2000</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>workforce under 25</td>
<td>16.1%</td>
<td>15.9%</td>
</tr>
<tr>
<td>workforce over 55</td>
<td>12.9%</td>
<td>19.9%</td>
</tr>
<tr>
<td>workers that are men</td>
<td>53.5%</td>
<td>51.5%</td>
</tr>
<tr>
<td>workers that are women</td>
<td>46.5%</td>
<td>48.6%</td>
</tr>
<tr>
<td>African-American workers</td>
<td>11.8%</td>
<td>12.9%</td>
</tr>
<tr>
<td>Hispanic workers</td>
<td>10.9%</td>
<td>13.7%</td>
</tr>
<tr>
<td>other minority workers</td>
<td>2.0%</td>
<td>4.0%</td>
</tr>
</tbody>
</table>
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# 5 SUSTAINING MARKETS FOR INDUSTRIAL & OFFICE PROPERTIES IN THE DECADE AHEAD

### #1 MEDICINE AND HEALTHCARE

**PROJECTED NEW EMPLOYMENT -- 2002 TO 2012**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices of health practitioners</td>
<td>1,229,000</td>
</tr>
<tr>
<td>All other ambulatory care</td>
<td>670,000</td>
</tr>
<tr>
<td>Hospitals</td>
<td>632,000</td>
</tr>
<tr>
<td>Nursing and residential care facilities</td>
<td>942,000</td>
</tr>
<tr>
<td>Pharmaceutical manufacturing</td>
<td>68,000</td>
</tr>
</tbody>
</table>

**TOTAL NEW EMPLOYMENT**

3,547,000

### RELATED TRENDS AND DEVELOPMENTS

- Annual hospital admissions fell from 34 million in 1985 to 33 million in 2000, while outpatient visits rose from 220 million to 521 million during the same period.

- The number of Ambulatory Surgical Centers (ASC's) in the U.S. rose from 750 in 1986 to 3,570 in 2002, and are expected to exceed 5,000 by 2010, surpassing hospitals in total employment by 2012.

- Nearly $1 billion was invested in new medical office buildings in 2002, up from $786 million in 2001.

- After 20 years of declining admissions, hospitals are experiencing 3% annual increases in patients, almost entirely from aging Baby Boomers, whose numbers will grow 50% during the next 10 years.
5 SUSTAINING MARKETS FOR INDUSTRIAL & OFFICE PROPERTIES IN THE DECADE AHEAD

#2 EDUCATION

PROJECTED NEW EMPLOYMENT - 2002 TO 2012

<table>
<thead>
<tr>
<th>Category</th>
<th>Projected Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Educational Institutions (K-16)</td>
<td>1,730,000</td>
</tr>
<tr>
<td>Private Educational Institutions</td>
<td>759,000</td>
</tr>
<tr>
<td><strong>Total New Employment</strong></td>
<td><strong>2,489,000</strong></td>
</tr>
</tbody>
</table>

RELATED TRENDS AND DEVELOPMENTS

- Enrollment at all K-12 schools is projected to grow by 2.5 million (4.8%) during the coming decade, while post-secondary enrollments are projected to increase 15.6%; by 2,388,000 students.

- The number of new post-secondary faculty is projected to grow by 603,000 between 2002 and 2012.

- In 2002, New York City’s desperately over-crowded, under-funded public schools re-vamped their restrictive building standards to permit classrooms to be located in non-purpose-built, rehabbed space. Other cash-strapped older cities can be expected to adopt the NYC guidelines - under which schools are now operating in a converted salami factory, a defunct department store and the 13th floor of a downtown highrise.
TRENDS IN POST-SECONDARY EDUCATION

In the mid-1990's, venture capitalists and entrepreneurs made a well-publicized entry into the education marketplace. While for-profits have not yet been cost-effective in mainstream K-12 education, they have been remarkably successful at serving the rapidly-growing post-secondary and adult education markets.

<table>
<thead>
<tr>
<th>INDICATOR</th>
<th>1991</th>
<th>2000</th>
<th>GROWTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of for-profit 2-year schools</td>
<td>271</td>
<td>483</td>
<td>78%</td>
</tr>
<tr>
<td>No. of public 2-year schools</td>
<td>986</td>
<td>1,075</td>
<td>9%</td>
</tr>
<tr>
<td>No. of for-profit 4-year schools</td>
<td>79</td>
<td>194</td>
<td>266%</td>
</tr>
<tr>
<td>No. of public 4-year schools</td>
<td>595</td>
<td>613</td>
<td>3%</td>
</tr>
<tr>
<td>Degree program enrollees in ALL for-profit higher education</td>
<td>230,00</td>
<td>366,000</td>
<td>59%</td>
</tr>
<tr>
<td>Degree program enrollees in ALL public higher education</td>
<td>10,560,000</td>
<td>11,200,000</td>
<td>6%</td>
</tr>
<tr>
<td>For-profit share of 2-year post-secondary market</td>
<td>19%</td>
<td>28%</td>
<td>47%</td>
</tr>
<tr>
<td>For-profit share of 4-year post-secondary market</td>
<td>3%</td>
<td>8%</td>
<td>167%</td>
</tr>
</tbody>
</table>

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   Cashing out and filling in
5 SUSTAINING MARKETS FOR INDUSTRIAL & OFFICE PROPERTIES IN REVOLUTIONARY TIMES

#3 GOVERNMENT & NON-PROFITS

PROJECTED NEW EMPLOYMENT - 2002 to 2012

<table>
<thead>
<tr>
<th>Category</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>State &amp; local government (not including education)</td>
<td>788,000</td>
</tr>
<tr>
<td>Publicly-funded social services</td>
<td>913,000</td>
</tr>
<tr>
<td>Non-profit/non-governmental organizations</td>
<td>601,000</td>
</tr>
</tbody>
</table>

TOTAL NEW EMPLOYMENT 2,302,000

RELATED TRENDS AND DEVELOPMENTS

• While Federal employment fell by 350,000 during the 1990’s, state and local government employment rose by more than 1 million. This growth will continue, driven largely by increases in the general population.

• On-going welfare reform is leading a growing number of local governments to “outsource” their public social assistance programs to private, non-profit institutions that are freer to use private sector services than their governmental counterparts. Individual and vocational rehab, family counseling, social assistance, elder and child care will increasingly be located in local office and commercial space.
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SUSTAINING MARKETS FOR INDUSTRIAL & OFFICE PROPERTIES IN REVOLUTIONARY TIMES

#4 TRENDS AND DEVELOPMENTS IN FACILITIES MANAGEMENT

• While outsourcing is a new reality for corporate functions like human resource management and purchasing, it is the norm for corporate real estate in America, where only 30% of business property is owner-occupied; in Europe, 60% of corporate real estate is owner-occupied.

• Big businesses in the U.S. & the E.U. are cashing out their real estate holdings - there were $7.8 billion in corporate real estate sales in the U.S. in 2003, up from $7.3 billion in 2002. The adoption of new international accounting standards will provoke more such sales.

• Like American business, U.S. state and local governments have begun to outsource their real estate management.
MORE TRENDS AND DEVELOPMENTS IN FACILITIES MANAGEMENT

• Real estate can account for 15% of business operating costs, but a 2004 McKinsey & Co. study found corporate real estate is “chronically and wastefully under-managed,” often without basic tools of space planning and management.

• A multi-industry study of the future of corporate real estate published in November, 2003 by CORENET GLOBAL REAL ESTATE NETWORK, concluded that:

“When appropriately planned and managed, outsourcing can allow the enterprise in general, as well as the corporate real estate department in particular, to focus its remaining resources on the more strategic challenges facing the corporation, and to explore new ways to add value.”
5 SUSTAINING MARKETS FOR INDUSTRIAL AND OFFICE PROPERTIES IN REVOLUTIONARY TIMES

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SUSTAINING MARKETS FOR INDUSTRIAL & OFFICE PROPERTIES IN REVOLUTIONARY TIMES

#5 TRENDS & DEVELOPMENTS IN RECYCLING INDUSTRIAL ERA CITIES

• Only 2 or 3 center city economic development schemes based on sports venues have actually generated improved municipal finances or CBD growth, while urban development based on conference-event facilities and convention centers have proven fiscally disastrous failures for dozens of U.S. cities.

• A gathering combination of factors -- rising gasoline prices and pollution levels, growing personal and commercial costs of traffic gridlock, CBD development incentives to raise urban tax bases, smart growth barriers, etc. -- will slow suburban sprawl by decade’s end, as . . . . .

• Demographics, marketplace economics, local rehabilitation sub-codes, and integrated development begin to favor suburban in-fill and urban center re-development over "edge cities."

• A projected 50% growth in urban transit systems in the U.S. and Canada – mostly light rail – will expand opportunities for mixed-use “transit villages” to revitalize central cities and older suburbs.
WILD CARD!!

“The world has never faced a problem like this. Previous energy transitions (wood to coal and coal to oil) were gradual and evolutionary; oil peaking will be abrupt and revolutionary.”

report from the
National Energy Technology Laboratory
U.S. Department of Energy
February, 2005
SUSTAINING MARKETS FOR INDUSTRIAL & OFFICE PROPERTIES IN REVOLUTIONARY TIMES

#5 Trends & Developments IN RECYCLING INDUSTRIAL ERA CITIES

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MORE TRENDS IN RECYCLING INDUSTRIAL ERA CITIES

• Mixed-use residential/commercial/office development projects that create “urban villages” in center cities and old suburban neighborhoods have become a proven replicable model for attracting Young Upwardly-Mobile Professional Singles -“YUMPSies.”

• As corporations divest themselves of their real property, commercial realtors will end up owning a great deal of urban real estate that will be forever redundant to its original purpose.

• Empty urban buildings of all kinds will be in increasing demand to meet a variety of transitional uses, including parking and storage lockers, and to house our rapidly-growing info-structure, including secure data switching and storage facilities, and information utility processing centers.
America’s 567 Micropolitan Towns

• America’s cities AND suburbs are expected to lose BOTH businesses and residents to fast-growing “micropolitan” communities -- 10,000 to 50,000 in population -- located in rural areas throughout the country.

• Our 567 micropolitan towns are already home to 28 million Americans (detailed in NAIOP’s 2005 book, BOOMTOWN, USA).

• Micropolitan growth centers were first identified by the U.S. Census Bureau in the 1980’s, but their growth accelerated following 9/11. Further acts of terrorism targeting metropolitan areas can be expected to further this “urban flight.”

• The bulk of micropolitan population growth will be over 50-year old “semi-retirees” who account for 55% of all U.S. retail sales.
To Compete with the Micropolitan Boom Towns, Successful 21st Century Cities will adopt Hollywood Production Values,

Exteriors of tall buildings will offer lucrative opportunities for “super-graphic” animated advertising, messaging, civic performance art and giant television screens/computer monitors, all made possible by covering the outer surface of the structures with energy-efficient LEDs.
To Compete with the MicroPolitan Boom Towns, Successful 21st Century Cities will adopt Hollywood Production Values,

and Property Owners will be the Producers!
“The future evolves in an orderly fashion, out of the realities of the past, filtered and shaped by the decisions of the present.”

David Pearce Snyder, 1969