

TRENDS AFFECTING COMMUNITY DEVELOPMENT & HOW WE LIVE IN AMERICA

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Each community possesses unique and different circumstances. Each has different resources. And yet, every community has experienced, and is living through, fundamental changes in our society, in our economy, in education, in our lifestyles, in the nature of work, and in our standard of living. Because of this, there is probably no community that can continue to be what it has been. There is no town that will be able remain the same. Change is continuing. Trends will continue to affect communities on a daily basis.

An awareness of, and a willingness to address applicable trends will be necessary to devise an effective Town Center Plan. Acceptance of obsolescence and change will be necessary. Understanding the specific needs of the Town Center Planning Area in its greater context will be necessary. The collaboration of consultants with members of the community, and others who may have a stake in the future of the planning area will be essential. Original thought, and the willingness to try new ideas will be necessary, particularly if new and effective strategies are expected to emerge. It takes vision to accept these things, and planning work must focus on the future and embody vision.

CHANGES IN POPULATION

From a community planning perspective, the most significant trend in America is the growing proportion of the national population that is 65 years of age or older. This segment of the population is also growing the fastest throughout the developed world.

In the United States, it is estimated that 12 percent of the population was over 65 in 2000, and the Census Bureau estimates that by the year 2030, this percentage will grow to more than 20 percent. If correct, this predicts that 71.4 million Americans will be 65 years of age 22 years from now.

The magnitude of this change, journalized generally as the aging of the baby boomer generation, will impact every community in America in many ways. The elderly segment of the population is currently the wealthiest, but it is estimated that only about half of the "boomers" will be able to maintain their standard of living. It is estimated that one in four of these seniors will become dependant upon government programs. Estimates predict that there will need to be twice as many physicians specializing in geriatrics to serve the elderly population, and 500,000 more nurses by 2020.

Suburban communities will likely face demand for increased social services, such as public transportation, senior day care, and similar social services, because the populations of suburban communities in the United States are aging faster than most other communities. As people age, they drive their cars fewer miles and less often, because they become less confident in their abilities, and because they develop health and physical infirmities.

Spread out land use patterns impact senior populations in so far as shopping for groceries, prescription medications, and public services become increasingly inaccessible to them. Furthermore, it is estimated that alternative transportation services for seniors are not available in more than 50% of metropolitan areas. It will become increasingly necessary for buddies, family members, and volunteers to offer passenger services for seniors.

CHANGES IN BUSINESS AND WORK

The world economy now exists, but most people do not as of yet understand how this affects them. Products are now assembled, and services are procured and provided, by "project teams" from all corners of the globe. Data entry and management for U.S. corporations is done over night by staffs working on computers in Ireland and in Barbados. Radio Shack no longer makes a car radio, they buy radios from China for resale, while the marketing is done somewhere in America. The construction documents for architectural and engineering projects are often assembled simultaneously in Columbus and Taiwan, or in New York and India, with E-Mail serving as the medium for communication.

The world economy operates on a value added basis, just like pro sports and Hollywood. The success of an individual, and his/her income, will be measured by the individual's worth (contribution) to the world economy. To get a handle on this context, one researcher (Robert Reich- *The Work of Nations*) predicts that there will be only three (3) job types to consider for relative positioning. These job types follow, with a brief description and value position.

- **Repetitive Production Worker**- The assembly line worker, or the farm worker, has the lowest position, and the least job security. These are the jobs being replaced by robotics, unregistered immigrant workers, and cheaper labor in foreign countries, as companies continually find ways to reduce costs of production.
- **In Person Server**- This is the service technician, the restaurant server and the hair stylist. Future earnings and job security depend upon who one would be serving and the recipient's perception of the value of service. Values are declining for many service functions. The preparation of wills, for example, can be done for \$19.95 if a person buys a computer program and does the work by him/her self, instead of hiring a lawyer.
- **Strategic Analyst**- This is the definer of the problem, the person who solves the problem or the broker of its solution. This is the idea person, the fashion designer, the "hot" author, or the star athlete who can score the most points. This is Tom Hanks or Sharon Stone who can guarantee ticket sales. This is the research scientist who will find the cure for AIDS, the planner who can point the correct way, the marketing genius who can sell the product or the TV producer who can cause a show to climb in ratings. This is the CEO of a major corporation that saves millions by off shoring data worker jobs to India. These are people who earn money on the basis of the value they add to a venture. These are the stars of the world economy.

The U.S. economy has been expanding continuously since 2001, though not always at the same rate. New jobs have been added in the service sector, which has grown the most, replacing almost all manufacturing jobs that have been lost. These new jobs have not matched previously held pay scales, however, and Americans have seen a decline in the standard of living in the middle and lower class of working families. In most cases, workers have not possessed the

education, nor the skill sets or training needed to fill the new jobs, and many jobs training programs have missed the mark by focusing upon computer skills that are available in other countries at lower salary levels.

Ohio's economy has been in decline for an extended period. More than one quarter of a million manufacturing jobs have been lost. The Census Bureau has reported that Ohio led the nation with the greatest number of counties with the greatest population lost. However, the population of Franklin County grew by 0.85 or 9,040 residents, and the six counties surrounding Franklin County grew by 10,428 residents, making Central Ohio the State's only bright spot in population growth.

Population growth and new households generally follow job growth. In fact, job growth in Central Ohio has been positive. New jobs have been shared on a roughly equal basis between the City of Columbus and all of the suburban communities and surrounding counties. The nature of jobs has shifted, however. For example, within Central Ohio, 17% of all retail jobs have been lost since 2001. The manufacturing sector has experienced a large decline in jobs. Construction and real estate has been down. The job sectors which have showed little or no growth include government, technology and business services, and logistics and utilities. The growth sectors included entertainment, dining & lodging, health care and social assistance, and professional, technical and other services.

Related to the new ways in which we work, companies are seeking to consolidate floor space through greater efficiency of design and sharing of space, telecommuting and other technology-based productivity boosters. This is reflected in an upward trend of closer to 5 office workers per thousand square feet of gross leasable space rather than the traditional rule of thumb of 4 office workers per thousand square feet. Consolidation, flexibility, and design efficiency are long-term forces that will shape future office real estate trends. In turn, developers are seeking more efficient and integrated uses of buildings and land.

Space needs of tech firms do not fit the empty shell designs of the past. Today's emerging companies need space that is flexible enough to easily meet quickly changing requirements. Team spaces are given highest priority while individual offices are not laid out along a hierarchical structure as they were in the past. As an Internet marketing executive commented, "Having the latest computer equipment is more of a status symbol in our company than sitting in the biggest office." Trends such as telecommuting, "hoteling" (working remotely most of the time but reserve office space when needed), mobile "officing" (working remotely on the road), flextime (working hours outside of traditional 9 to 5 shift), job-sharing (sharing a full-time job on part-time basis with another part-timer), freelancing (working at clients office for duration of a project), and work/live space are changing space requirements in corporations of all sizes. There are many jobs in our New Economy that require only a laptop computer and a cellphone to accomplish anywhere the worker desires. This has led to a re-surgence of "third places" such as coffee shops, libraries, and outdoor cafes.

Another trend is the sharing of space and pooling of resources among complimentary businesses.

Office suites offer small firms (often one person) a well-furnished office with administrative services, conference rooms, high speed Internet access, and basic office equipment at a prestigious address. Some upscale versions offer onsite fitness centers and concierge services. They generally appeal to sales reps, small

local staffs of large national corporations, startup entrepreneurs, and those on temporary assignments. A related concept is business incubator space where promising startup businesses are provided with technical and business assistance in addition to cheap space. Office condominiums are gaining in popularity to leasing for professional practitioners such as physicians. A condominium allows the practice to own its real estate (which has favorable tax implications) without entering the real estate business as a landlord to others. Innovative economic development professionals are identifying industry clusters that play to a municipality's particular strengths. Although clusters are often thought of as a concentration of like businesses in one area, vertical clusters that emphasize supply chain relationships may prove to be more sustainable over the long haul.

CHANGES IN EDUCATION

We now live in what is called the knowledge economy, and it seems almost incomprehensible that only about 25% of high school graduates go on to receive a college education. It is estimated that from 18% to 30% of all high schools students drop out before graduation. This is foreboding, because the aspirations of the nation's young people will never be met. Census data indicate that in 2005 college graduates earned \$54,689, compared to \$29,448 earned by persons with only a high school diploma. The drop outs earned just \$19,915, and persons with professional degrees earned up to \$119,009.

The information age has defined the knowledge economy and distance learning. Recent research estimates that there are one billion users of the internet, with a growth rate approximating 15% per month. Every Major Corporation, charitable and political organization, educational institution, community service agency, and unit of government has integrated use of the World Wide Web into its marketing, information and communication strategies.

Distance working, even from the home, is a characteristic of the world economy, which both drives the existence of, and prospers from, all of the above trends. Technology is changing the nature and scope of community. Technology is changing the nature of work and the systems or rewards for effort expended. Technology has rendered job insecurity to all who would ignore it, which is why education has become a K through life curriculum.

New research indicates that the U.S. is entering the creative age, a time when new ideas will generate new products and new businesses. It is now recognized that even with computer skills, data workers contribute very little added value to the processing of information. It is innovation (new ideas), not mass production of low-value goods and services that is the driving force in the new economy.

Studies are now under way to determine what should be taught to develop creative workers and leaders. The current trend focuses on the arts, culture, and technology as the subject matter. One researcher reports that communities most likely to burst with entrepreneurial fervor will be those that place a premium on cultural, ethnic, and artistic diversity. Many educators now believe that artistic talents are vital to all industrial efforts that depend upon the marriage of computers and telecommunications.

CHANGES IN SHOPPING

There are many trends changing how people shop. Data show that for the past 10 years, retail sales nationally have shown a growth of only 4 percent, while sales growth for products purchased on the internet have grown at a rate above 20 percent. Sales through mail order retailing have also done well. As a result, there has been significant consolidation among department stores, and many "big box" retail developments have closed. The pool of retail tenants who might anchor new malls has reduced, and many analysts now predict that new mall development is in a period of decline.

The retail industry has responded in several ways, the most basic having been targeted selling to narrowly defined segments of the population. Grocers in Hispanic or Asian neighborhoods have, for example, provided great selection in the fresh produce preferred by each ethnic group within their market area. Many specialty retailers have been formed, such as Wild Birds Unlimited, to target the bird enthusiasts within the overall market. Segmentation of the market by age group has provided another approach; seniors may be offered specialty products, or younger "people on the go" are offered pre-cooked dinner options to purchase at a Whole Foods market on the way home from work. The more traditional "one-size-fits-all" concept of merchandizing has all but vanished.

Similarly, the trend toward public action in support of social goals has generated a focus for specialty retailing that did not exist ten years ago. Referred to as ethical consumerism, a growing segment of the shopping public has begun to seek out and demand products from companies that do not exploit impoverished labor or the environment. These people have paid premium prices to encourage, through their purchases, the development of a variety of products such as compact fluorescent light bulbs, hybrid vehicles, and organic (and fair trade) foods and beverages.

Lifestyle retailing has become the most popularly journalized approach to retail sales. Developers have coined the term "Lifestyle Centers" as the basic marketing thrust for shopping places that have enhanced pedestrian amenities, with superb landscaping, places for outdoor dining, and stores that carry merchandise targeted to specific segments of the shopping public. The Urban Land Institute has recently said it has not been able to define what a lifestyle center really is, because there is no such thing. What exists for the shopper is a growing opportunity to shop in civic places that do provide experiences for social enjoyment while shopping.

Of significant interest is the array of new centers that have been developed in the pattern of historic town centers. Plans for these centers feature streets laid out in a grid fashion, with curbside parking, street furniture, and public plazas and parks. These places have demonstrated a renewed interest in renovating town centers.

Current retailing strategies consist of making stores smaller, focusing on environmentally friendly "green design," and providing more shopper amenities. Whole Foods has set a trend for smaller stores (12,000 to 16,000 square feet). Nordstrom, Inc. is replacing its shopping bags and gift boxes with boxes and bags that are 100% recyclable. Store design is implementing the use of "eco-friendly" construction materials. Retailers are recognizing that mixed-use communities are increasingly attractive for shoppers. Places where people live, work, shop and play are pleasing places, and they draw customers from a larger market area.

CHANGES IN LIFESTYLE

Diversity in lifestyles has become more apparent with demographic changes. The cultures of the world's developed countries are becoming more heterogeneous. People no longer feel limited to live in certain neighborhoods, and they are becoming less limited by class or ethnicity. People of varying age groups are becoming more comfortable in expressing attitudes and living preferences outside of those traditionally associated with their age group. American business has responded to this trend through "microsegmentation" of the marketplace, breaking down the mass market into ever smaller groups of potential customers with similar wants and needs.

For example, marketing research efforts have summarized the differences in lifestyles between the baby boomers, the generation X'rs, and the generation y, new millenials. To be sure, market research has moved further to define micro segments within each of these generations. However, general summary of the lifestyles of each depicts how trends become modified by subsequent generations.

The Baby Boomers, born from 1946 through 1964, comprise nearly 28% of the U.S population. Researchers have segmented the boomers into two groups, born from 1946 through 1954, and born between 1955 through 1964. The first wave watched the assassinations of JFK, Robert Kennedy and Dr. Martin Luther King on television. They also watched the walk on the moon. They have direct experience with the Vietnam War, anti-war protests, and the sexual freedom, environmental and women's movements. These boomers are characterized as being experimental, individualistic, free-spirited and social cause oriented. The second wave lived through Watergate, the Cold War, the oil embargo, raging inflation, and gasoline shortages. Researchers characterize them as being less optimistic, generally distrustful of government, and generally cynical.

The baby boomers retain the greatest share of the cultural, industrial, political and academic leadership class in America. They also retain the highest median household incomes in the United States.

Researchers say that the baby boomers are known for excessive spending for themselves, rather than investing in future generations. These are the people, after all, responsible, as consumers for large lot single family suburban pattern development. Boomers defend their lifestyle by saying that they worked hard their entire lives to give their children (generation Y) a better life. Data show, however that the boomers accomplished this objective on a short term basis, not for the long run. Researchers believe that the boomers will empty their pension funds to support their lifestyle, leaving nothing for their children.

Retired baby boomers will (still) be in age denial. They are already spending record amount on health club memberships, home exercise machines, cosmetic surgery, health foods, vitamins, organic foods, bottled water, hair color, Botox, and Viagra. Baby boomers will have a toxic reaction to any product or service (including housing) that is labeled: "senior" or "mature," or other similar terms. This is a sensitive issue. Active downtown and urban environments can provide robust opportunities for senior boomers to stay active and connected to their communities after retirement. There is a growing movement toward the formation of nonprofit corporations that collect membership dues in exchange for provision of transportation, home cleaning and repair, companionship, security, and other services. Such self-help co-operatives will help seniors stay in their homes longer.

In some moderate income areas, the co-ops are set up by social services organizations which can tap into volunteer labor and barter exchanges to keep costs down (although the use of volunteers may present the need for liability insurance).

Generation Xers, born between 1965 and 1976, are often defined as the “baby bust” generation, because of the small number of births that took place during these years following the baby boom. Some researchers depict this generation, which numbers approximately 48 million, as tending to be consumer driven and media savvy, while others describe them as people who reject status, money and social climbing. This generation lived through the recessions of 1991 and 2001, and they experienced the affects of job outsourcing and off shoring. They are preoccupied with what they perceive as problems left by the previous generation that they must resolve.

Researchers report other interesting aspects of the Generation X lifestyle. This generation has a strong tendency to start their own businesses. This is the first generation to recognize the benefit of the internet, and many of them started dot-com companies. (Many made fortunes, and many declared bankruptcy.) This same generation is known to possess a love of nature and athletics, and is credited with starting the extreme sports movement, launching rock climbing, bungee-jumping, and snowboarding. This is also the first generation to abandon suburban living and to return to the cities, and their preferred dress is individualistic. They are credited with revitalizing many downtown areas.

Generation Y- the Millennials were born from 1977 through approximately 1990; some researchers stretch the limit to the year 2000. This generation which numbers almost 70 million is portrayed as young, smart, brash and casual in dress. These younger persons are the newest entrants into the job market, and they have high expectations for themselves. They tend to work faster and better than other workers. They seek creative challenges and bosses who will become engaged in their training for advancement. They also view colleagues as resources, seeking knowledge and experience wherever they can find it. Millennials are sought after by employers because they are the most tech savvy of all workers, but Millennials question traditional command and control management practices, causing great frustration for managers.

Researchers point out that members of this generation are financially smart, with 37% expecting to start saving for retirement before the age of 25. Retirement plans are a strong factor in job selection, and 70% of those who become eligible contribute to such plans. Gen Y's also seek to balance work with personal pursuits. They place a higher value on self-fulfillment than previous generations, and they like workplace options such as telecommuting, going part time for periods, and jobs with other forms of flexibility. At the same time, Gen Y's do not expect to stay in the same job for many years, or even the same career for life. They do not appreciate the concept of employee loyalty. These people are high performers, but also high maintenance.

Most communities working to develop their economies seek to attract Gen Y college graduates. One market researcher reports that the Millennials prefer to live and work within the downtown areas of cities, particularly those that provide green space, urban densities, and “cool” places within the context of old buildings. This generation, more than any other, places high value on good design. Gen Y's are looking for authenticity. To them, everything has history and context, and

everything does not need to be new. Price and value are paramount for Gen Y's, but value not narrowly defined. Value includes health and environment, time and efficiency, peer and self respect. For these consumers, the bottom line is higher.

Movements toward simpler living and saving the environment have taken hold in this decade with all generations after decades of operating on the fringes of mainstream American Society. Sale of natural and organic foods is growing by 10% a year while Saturday Farmers markets proliferate throughout local farms whenever feasible. Rising concerns about global warming coupled with energy price shocks are fueling the green wave. Wal-Mart is at the forefront of this movement to the surprise of its critics. But Wal-Mart understands that it has incredible potential to use its vaunted business model to mercilessly strip away inefficiency and waste as it relates to environmental and energy issues. It is committed to selling environmentally-friendly products (such as compact fluorescent bulbs) to its customers, using recycled materials to build its stores, and employing alternative energy sources to operate those stores. Next on its agenda is to pressure its vendors to adopt more environmentally sound practices if they want to do business with Wal-Mart. Sustainable development and eco-conscious lifestyles will be fundamental requirements from this point on for the human race to thrive.

CHANGES IN DEVELOPMENT

It is estimated that approximately 80% of all persons 65 years of age or older own their own homes, and in the United States these homes are located predominantly in suburban areas. Housing preferences change for seniors as they age. Research has shown that as baby boomers become "empty nesters," they prefer compact neighborhoods with pleasant and walkable streets. It is estimated that the demand for small lot "cottage houses" and for attached housing units will exceed supply by 2025. The shortfall is estimated at 35 million senior housing units. The same research estimates that the demand for large lot, single family housing in 2025 will fall short of the supply available today.

The market for senior housing is one of four markets within what developers are only beginning to recognize as the "4-S Group." In addition to seniors, the other markets within the group are housing for singles, housing for singles with children, and start-up housing. Each of these markets has different preferences, and developers have ignored them for years because it has been more lucrative to build large, more expensive single family housing for the boomer generation.

One new trend is for smart growth communities. Research has shown that 55% of Americans prefer new development to provide neighborhoods with a mix of single family and other types of housing, shopping places and schools within walking distance of housing units, places of work with commutes of less than 45 minutes, and accessible public transportation. This research indicated that Americans now believe that bringing places of work closer to home is smart growth.

Another trend moves directly away from "drivable sub-urbanism" to "walkable urbanism." Walkable urban places are much more densely developed, and consist of shops, offices, services and housing units all mixed together. One researcher used real estate sales data to show that people are paying 40% to 50% more for residential condominiums on a per square foot basis, in comparison to detached

single family houses. This shift in property value has been evolving over the last 10 to 20 years, and the number of walkable urban districts has increased from 2 in the 1980's to 17 by 2007. It is estimated that the pent up demand for these places will gravitate to suburban town centers, old strip malls in need of redevelopment, and new Greenfield towns.

The development community has embraced the concept of mixing complimentary uses within a single development plan. The largest projects consist of new Greenfield Town plans, new town centers, and new traditional neighborhoods. The typical use mix generally includes retail buildings with condominium housing units on upper floors, parks and recreational facilities, and offices. Generally several types of housing units are provided. Many developers have come to mix uses within single building projects, designed to "infill" the street front of existing commercial streets with vacant sites or designated redevelopment sites. One new market is live / work or career housing, which provides a mixed use option for professionals to start new consulting and related businesses, following early retirement or layoff.

Paralleling the trend toward mixed-use development the trend toward the adoption of design standards and design review by large and small governments has become almost universal. In most communities across the country, existing zoning regulations have not been updated to allow mixed use development proposals, without significant controversy.

A growing number of childless households have pets. Furthermore, pets are gaining status as fully-fledge family members (even as surrogate children in some households). Sales of pet-related merchandise and services is a \$50 billion a year industry in the United States and is growing at a pace twice that for all retail sales. One chain reported that it sold more dog clothing in December 2007 than it had sold in the entire previous twenty years combined. On any given warm-weather weekend, there are numerous dog-related community events in cities and towns throughout the country.

OPPORTUNITIES FOR GROVE CITY'S TOWN CENTER

All of the general trends presented above are applicable to Grove City. Some are more or less evident at this time. What is certain, however, is that there are specific opportunities for Town Center redevelopment across the Country, and within Grove City.

The population is growing in Grove City, and demographics show that the older segment (aging Baby Boomers born between 1946 and the early 1960's) and the younger segment (the new Millennials born between the early 1980's and 2000's) are growing the most rapidly in percent of total population. It is these segments of the population that have been fueling downtown redevelopment for almost the past decade, and research is showing that these people will continue to seek out mixed used urban environments. Grove City's Town Center planning area possesses precisely the characteristics and use patterns being sought. Appropriate additions and revisions just need to be planned for the place to meet the market demand and to become vibrant again.

Research is showing that changes in American lifestyles are being increasingly shaped by the global demands for non-renewable resources. As gasoline prices and construction costs increase, traditional suburban pattern land use and transportation patterns are becoming less sustainable. Trends are suggesting that more jobs and housing will cluster in town center districts to take advantage of existing infrastructure and to allow older and younger population lifestyles the option and benefits of urban walkable environments which provide opportunity for entertainment, cultural and recreational activity, and social interaction.

The opportunity for retail sales is also centering on the qualities that Town Center places offer. The primary qualities are buildings with legitimate historic character, the pleasing positives, for residents, of not having to drive their cars everywhere, and an association of small merchants that focus on providing service and atmosphere that is unique and above the level found in large stores and malls. These are places that are dog-friendly, and people respond by walking their dogs. Others come to have an ice cream, and to sit on benches to talk or to people watch. Restaurants appear in support of increased resident population.

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