



Emerging Trends In Online Site Selection



Introduction to GIS WebTech

- *Technology company focused exclusively on economic development*
- *Fastest-growing provider in the country with the only technology built natively on Esri's ArcGIS platform*
- *CAGR of >100% since launch of technology in 2016*
- *Serve economic development organizations of all sizes, in all regions of the country*



Let's Connect! Stop By and See Us!



Setting the Stage: Today's Typical Site Selection Process



- Use national data sets to allow comparison across regions, usually Esri
- Use advanced tools to allow quick analysis
- Esri's Business Analyst Online dominates this phase

- Visit websites of regional/local EDOs
- Gather data on specific dimensions unique to the search
 - ✓ Workforce
 - ✓ Infrastructure
 - ✓ Demographics
 - ✓ Quality of life
 - ✓ etc.

- Ask for huge amounts of data...
- ...and complex analyses...
- ...and often demand these in absurdly short turnaround times

Result: Most EDOs Eliminated with No Contact

*First
Cut*

*Second
Cut*

*EDO Learns
of Project*

*The Data and
Tools on
Your Website
Are Critical!*

Gather National
Data

Gather
Local Data

Prepare
RFI

Contact
EDOs



Setting the Stage: Drivers of Trends

New Data Sources are Exploding*

- *Collapsing costs are driving a rapid explosion in new data*
- *Businesses and site selectors are figuring out clever ways to use it*
- *As data explodes in quantity, quality becomes crucial*

Technological Advancement is Relentless

- *New tools that improve locations decisions emerge every day*
- *Businesses adopt them very quickly*
- *Technologies even a few years old are outdated*

***TEDC Webinar November 13**

Key Trends

Data Trends

1. Detail Wins Deals
2. Data Quality and Consistency are Differentiators
3. Highlight Your Local Data

Tools Trends

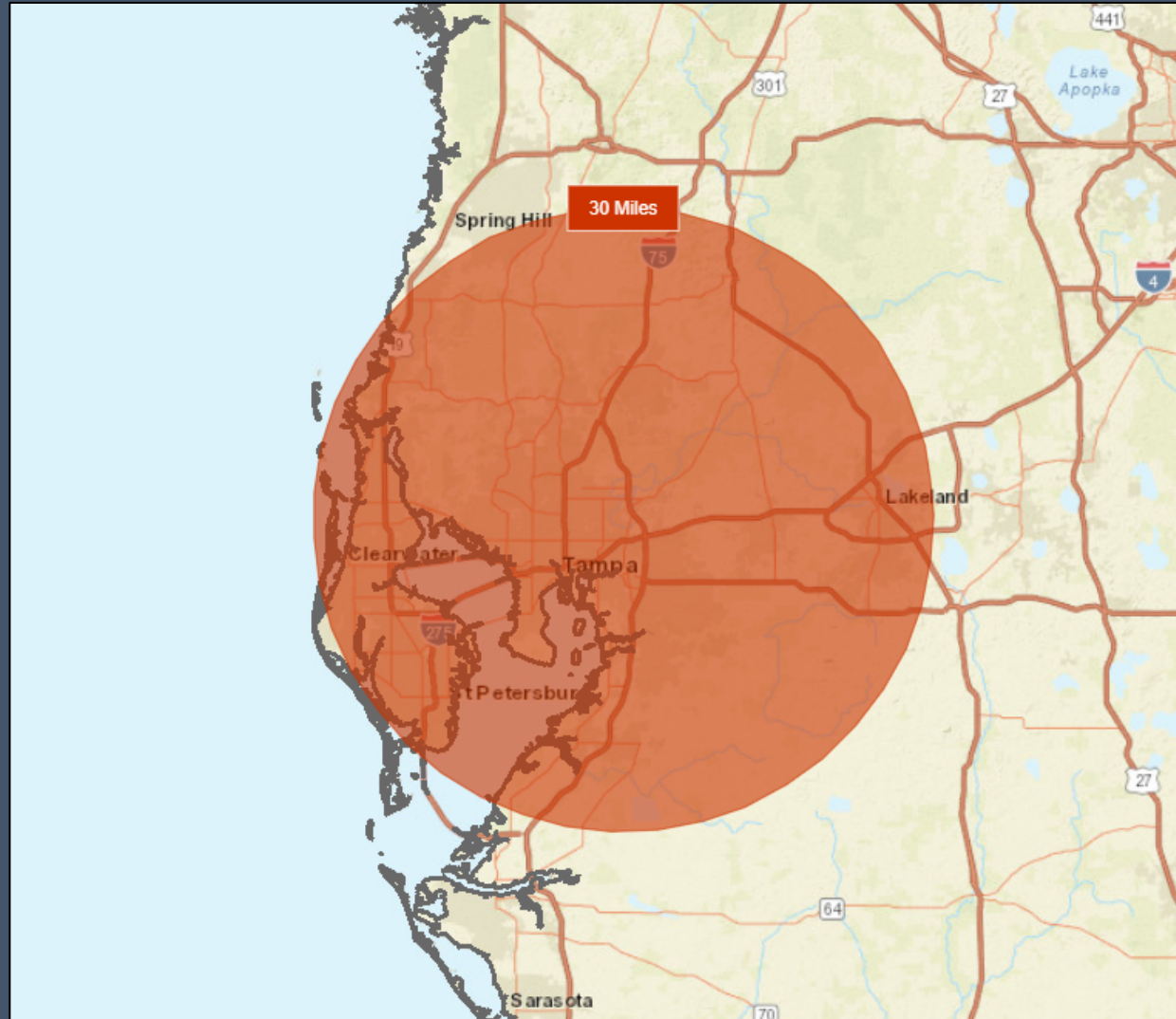
1. Drive Time Accuracy Requires Consideration of Traffic
2. Accurate Analysis for Manufacturers, Industrials and Distributors Requires Trucking Times
3. The Map is a Property Search Tool



More Detailed Data + More Precise Analysis = Better Decisions

Data Trend #1- Detail Wins Deals!

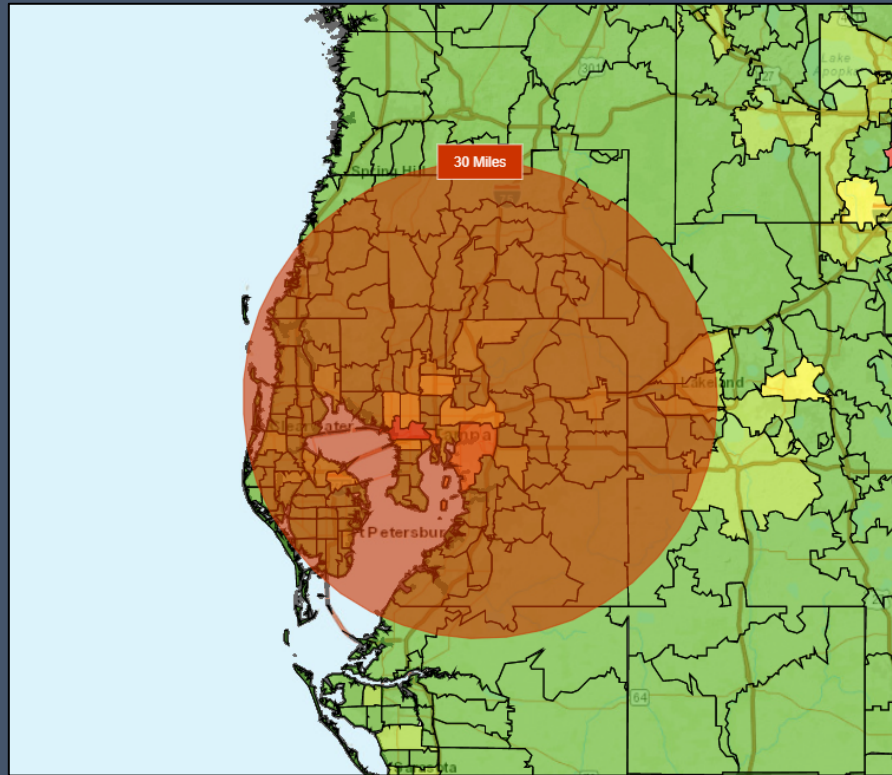
- *Business was interested in population within 30-mile radius of potential site*
- *Simple enough, right?*
- *Most online site selection apps provide ring or radius analysis...*
- *...with the ability to produce reports containing basic demographic data like population*



Data Trend #1: Detail Wins Deals

- *But...the simple analysis was really an attempt to quantify workforce*

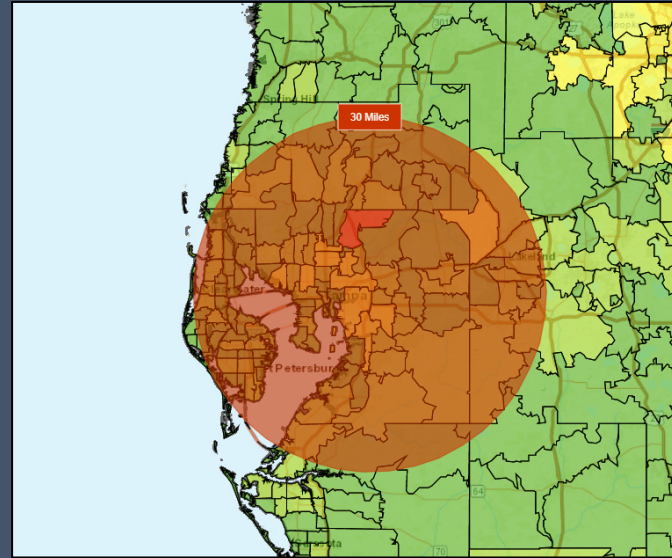
- *Client showed that the proposed location was close to current centers of employment - well within the 30-mile radius*



*30 Mile Radius with
Thematic Map
Showing Daytime
Population –
Workers Only*

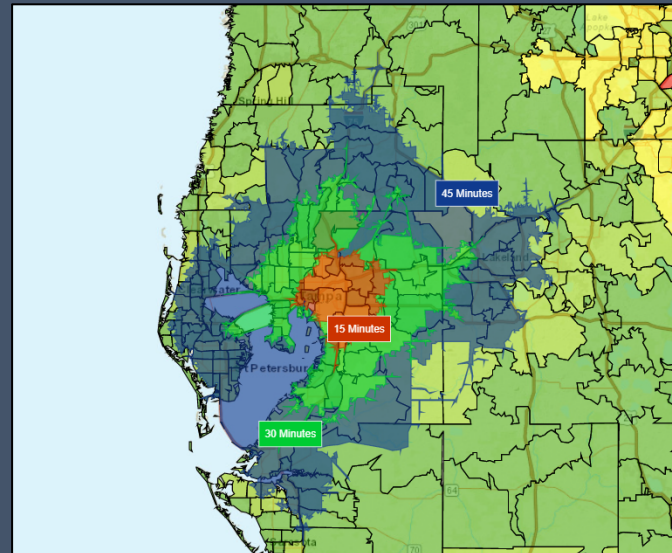
Data Trend #1: Detail Wins Deals

- *They then showed that the location easily intersected Millennial populations, the cohort the prospect was looking for...*



30 Mile Radius with Thematic Map Showing Population of Millenials

- *...and that these Millenial populations were well within reasonable commuting distances of the site*



Thematic Map of Millenial Population

- *Within 15, 30 and 45-Minute Drive Times*
- *Inbound Direction of Travel*
- *Mondays at 8:00 AM*

Data Trend #2: Data Quality and Consistency Are Differentiators!

- *Esri data has been shown in independent studies* to be the most accurate available*
- *National search is dominated by Esri data*
 - Esri's *Business Analyst Online* is ubiquitous
 - Businesses are already familiar with Esri data
- *Yet, most EDOs still do not provide Esri data on their website...*
- *...so this is your opportunity to differentiate!*



GIS WebTech

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Data Trend #2: Data Quality and Consistency Are Differentiators!

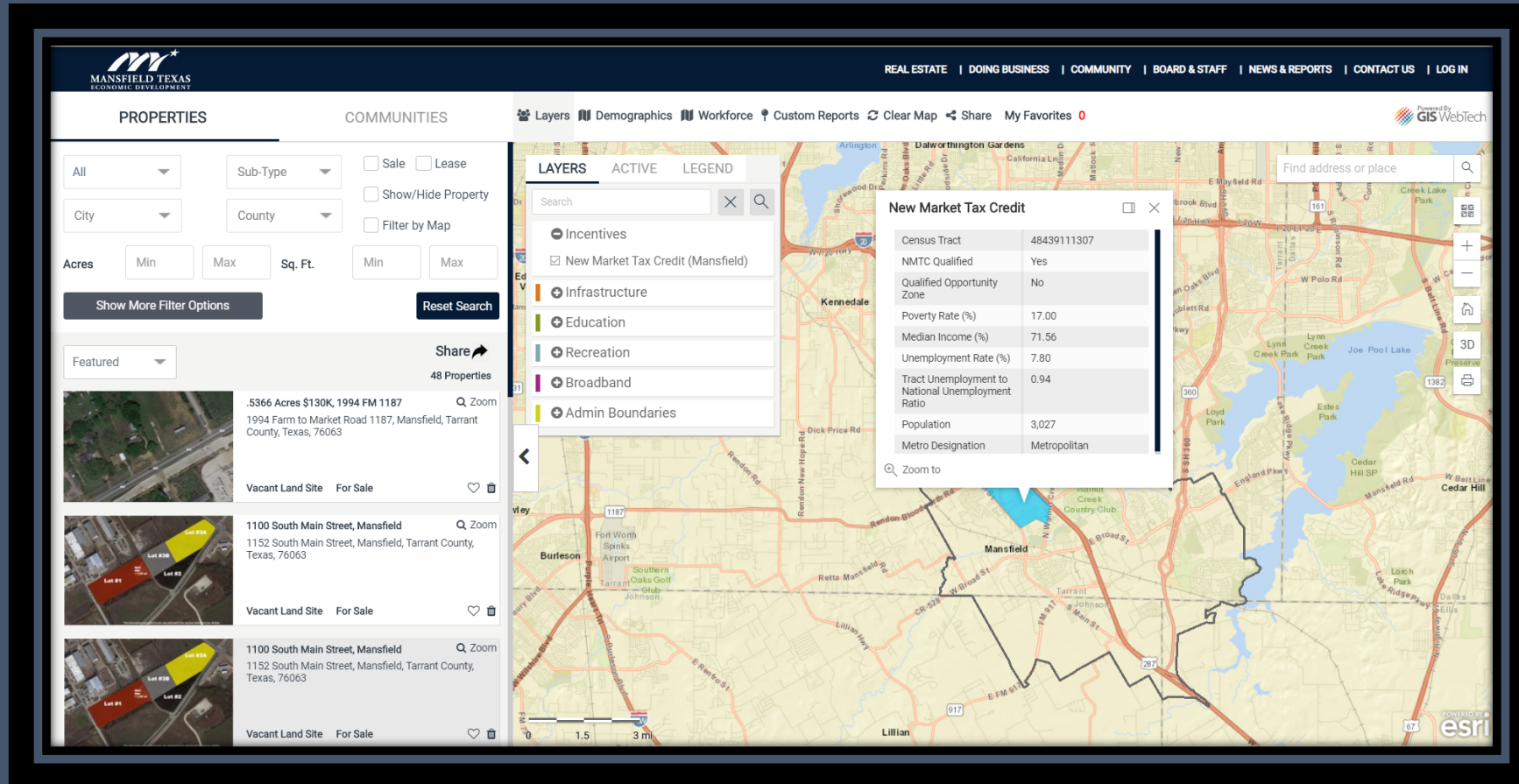


- ***Non-Esri data on your website?***
 - Best case = data reconciliation
 - Worst case = business moves on

Data Trend #3: Highlight Your Local Data

- Businesses and site selectors already have access to national data*

- What they don't have – and the reason they come to your site! – is local data showing your community's strengths*
- Example: state & local incentive zones*



Data Trend #3: Highlight Your Local Data

The screenshot displays the JEDCO (Jasper Economic Development Corp.) web application. The interface includes a top navigation bar with the JEDCO logo and a main menu with options like PROPERTIES, COMMUNITIES, Layers, Demographics, Workforce, Custom Reports, Clear Map, Share, and My Favorites (0). The PROPERTIES section is active, showing a list of properties with filters for All, Sub-Type, City, County, Acres, Sq. Ft., and Sale/Lease status. A 'Show More Filter Options' button is visible. The map area shows a location near Sam Rayburn Reservoir with a 'Parcels' popup window displaying details for a specific parcel. The popup window includes a table with the following data:

GRANTEE_NA	Jasper Timber Co.
DEED_ACRES	1,191.03
CALC_ACRES	1,182.71
Acct	000041-010800
DEED_REF	2316.29 acs. 803/478
Lat	30.9958028769257
Long	-94.0788747830695
Prop_ID	7,028

Other Layer Examples

- **Water, Sewer, Utilities**
- **Traffic Counts**
- **Zoning**
- **Tax Rate**
- **Voting Districts**
- **Hike & Bike Trails**

Emailing shapefiles? A sure sign you have outdated technology

Data Trend #3: Highlight Your Local Data

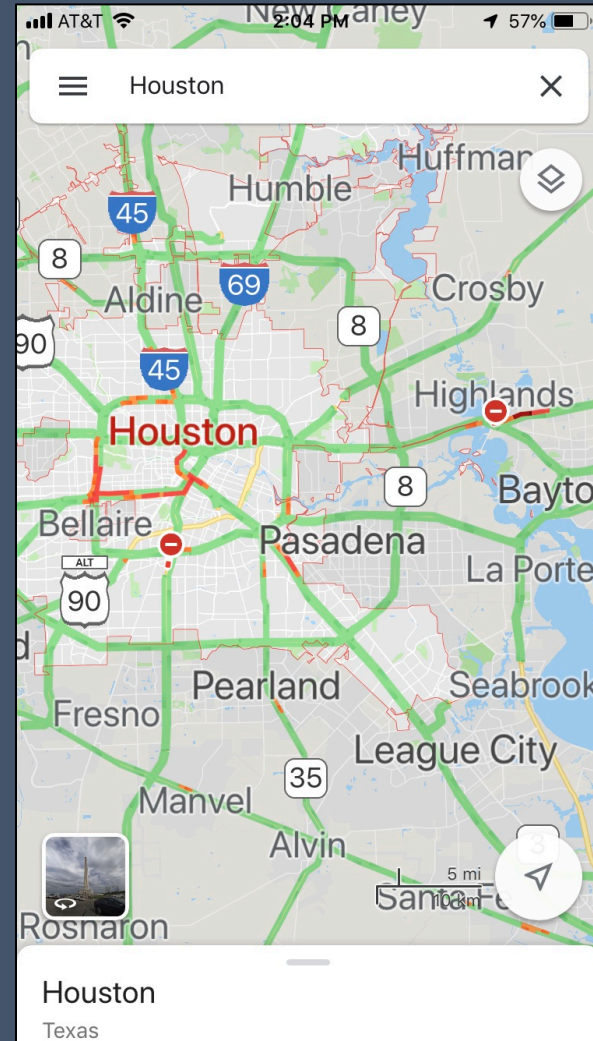
- *Have local workforce data or labor market study? Use it!*
 - Integrate it into online site selection technology and apply analytical tools like drive times
 - Provide reports designed with your branding
 - Technology provider wants to charge for this? Another sure sign you have outdated technology
- *Other local data opportunities*
 - Local trade certification programs and labor supply rates
 - Underemployment studies
 - Etc.



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Tools Trend #1: Drive Time Accuracy Requires Consideration of Traffic

- *Traffic is a reality almost everywhere*
- *Consider Houston, 2:00 PM this afternoon as illustrated on Google Maps*
- *Businesses are demanding analyses and tools that take this reality into account*



Tools Trend #1: Drive Time Accuracy Requires Consideration of Traffic

*Allow Up to Three
Drive Time
Boundaries in One
Report*

*Incorporate
Traffic into the
Calculations*

*Allow User to Select
the Day of the Week,
Time of Day, and
Direction of Travel*

Select Analysis Area

 Driving Time

Driving Time

20 40 60 (Minutes)

Show Fewer Options

☒ Use Traffic

Traffic Typical For:

Monday 8 AM

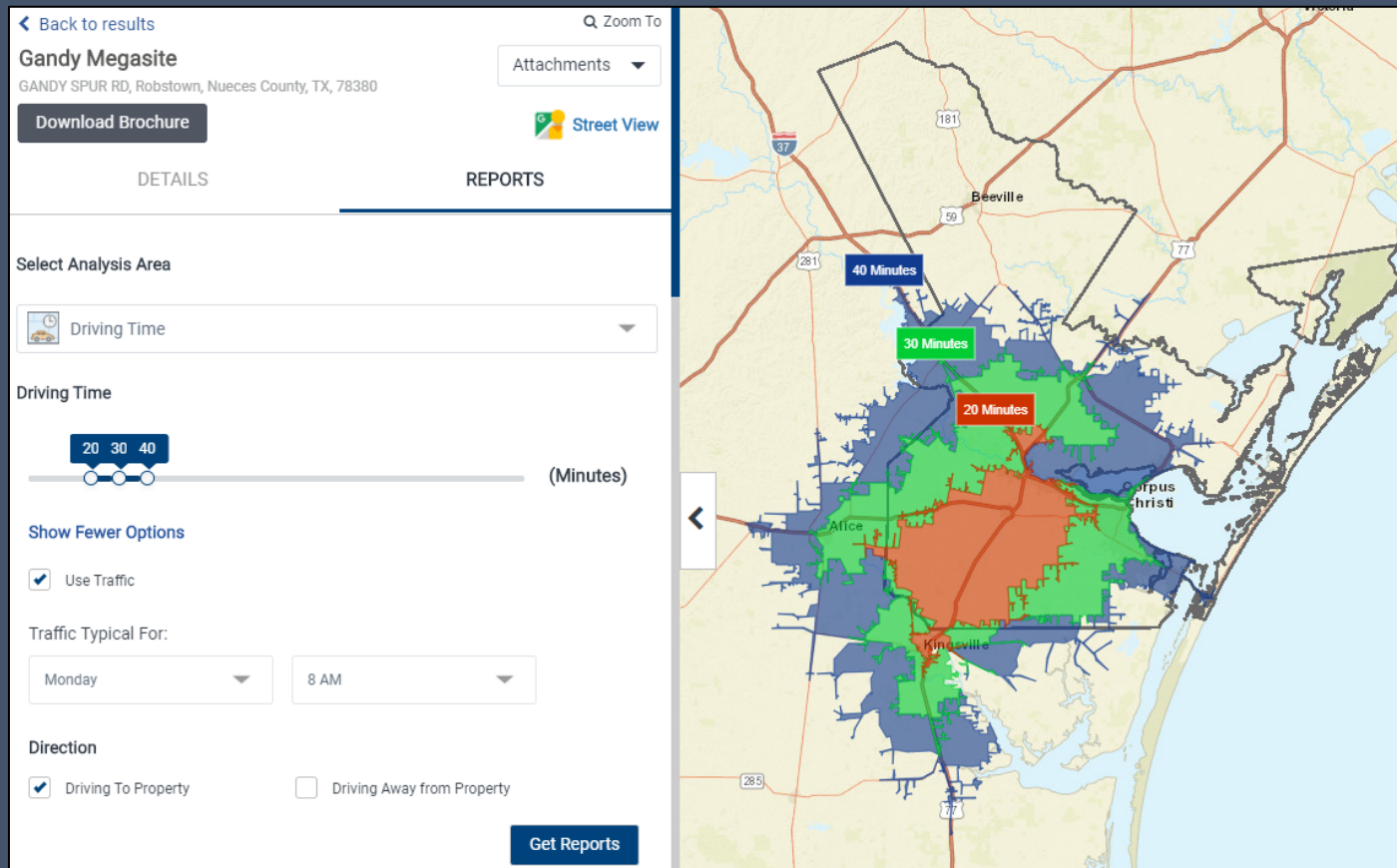
Direction

☒ Driving To Property ☐ Driving Away from Property

Get Reports

Tools Trend #1: Drive Time Accuracy Requires Consideration of Traffic

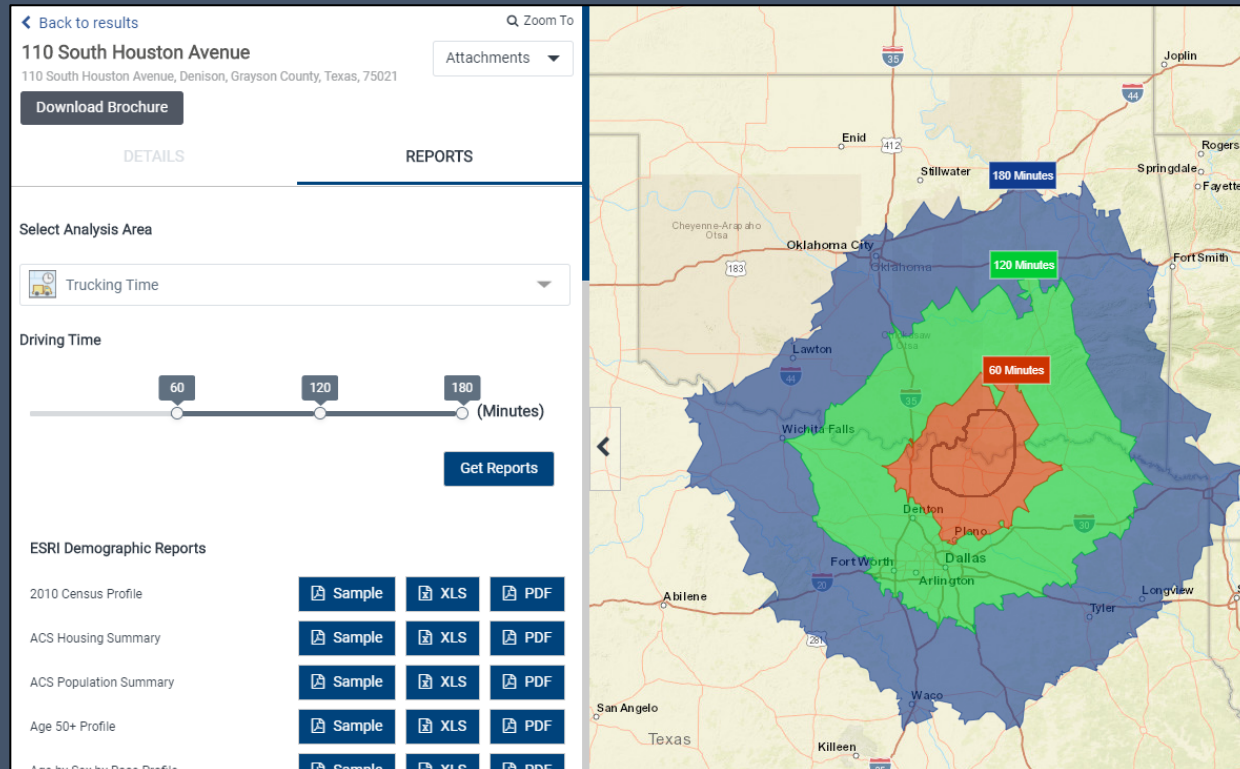
- *Result: highly accurate analysis, highly accurate data*



- *No ability to customize drive times for time of day, day of the week? Your technology uses average drive times making do distinction between Sunday afternoon and the heart of rush hour...*
- *...Another sure sign you have outdated technology*

Tools Trend #2: Accurate Analysis for Manufacturers, Industrials and Distributors Requires Trucking Times

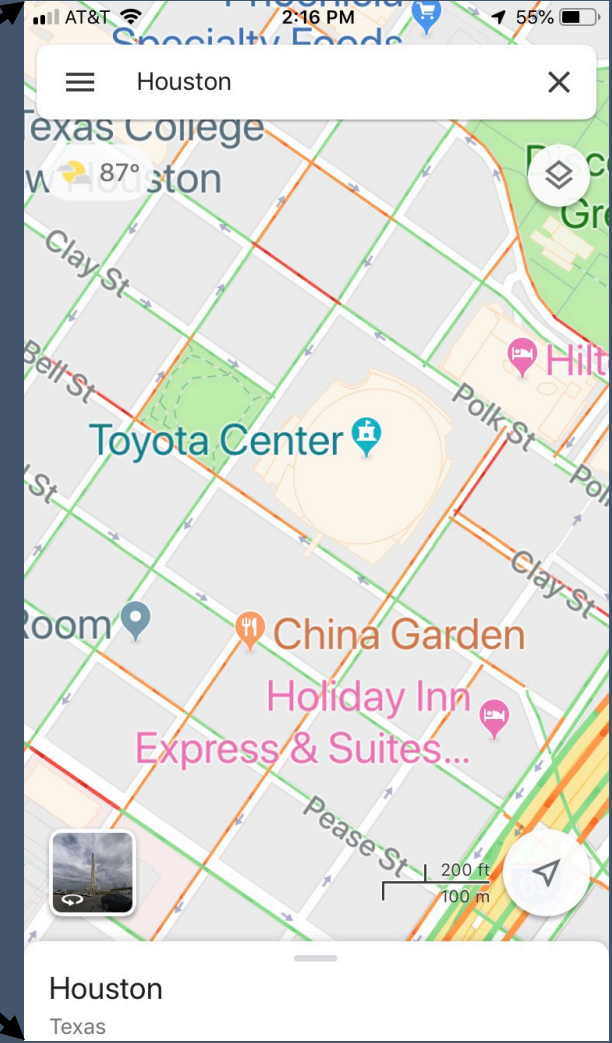
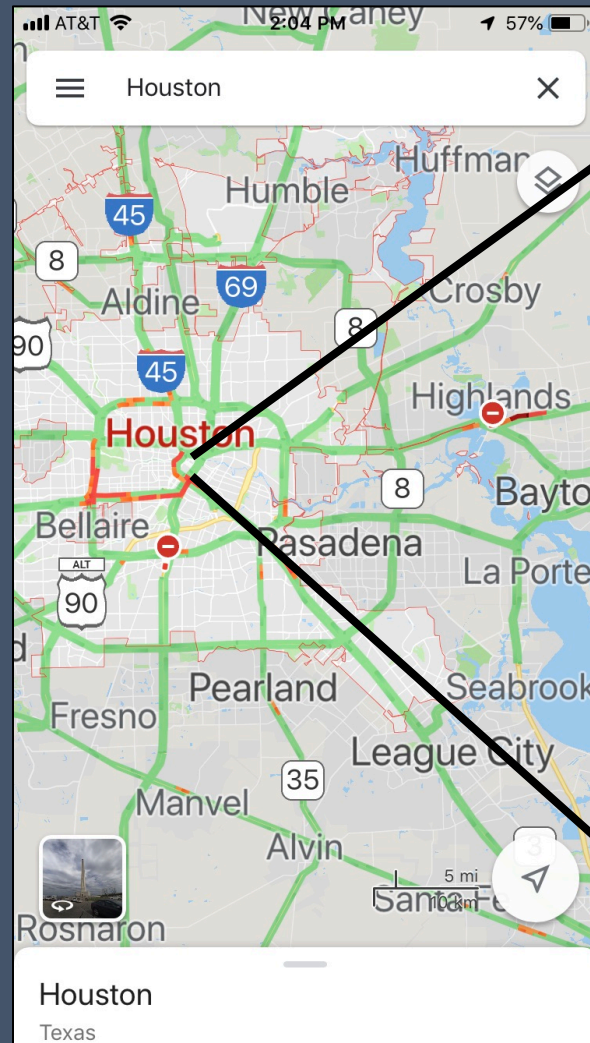
- Manufacturing, distribution, warehousing and industrial sectors often consider logistics among their most important considerations*



- Key demographic variables can be off by large percentages when derived from (car) drive times*
- Trucking time analysis provides more rigor*

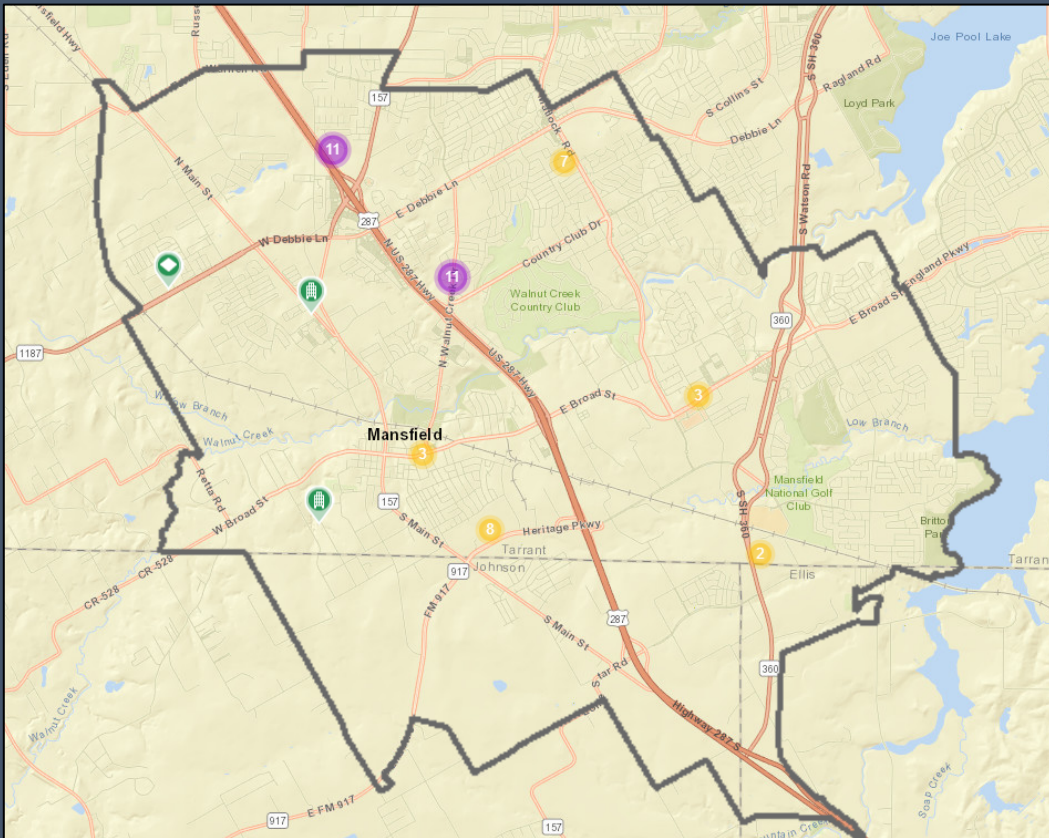
Tools Trend #3: The Map is a Property Search Tool

- *We all use GIS apps almost every day -- Zillow, Google Maps, Waze, etc.*
- *It is instinctive to simply zoom in on the map to look at areas of interest*



Tools Trend #3: The Map is a Property Search Tool

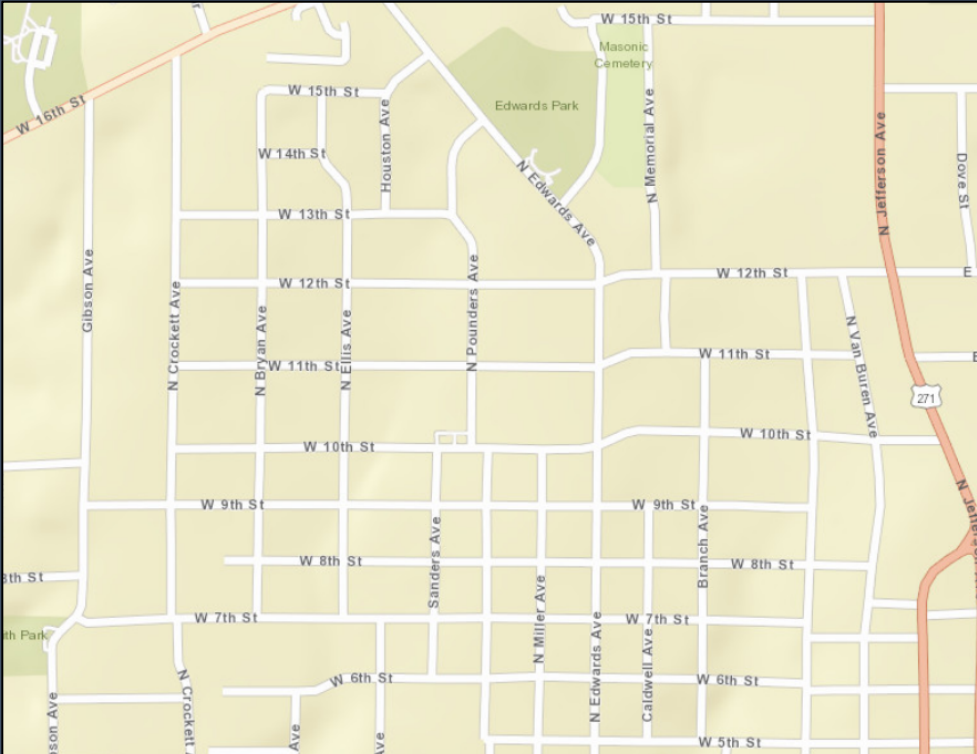
- You must show the spatial distribution of ALL properties on the map*



- Clustering keeps the map clean-looking*
- Clusters break down to show icons as user zooms in*
- User always sees all properties available in area of interest*

Tools Trend #3: The Map is a Property Search Tool

- **Consider what happens if only a batch of 20 or 25 properties are loaded**



- *User doesn't realize this*
- *Zooms into area of interest*
- *Sees few, if any, properties*
- *Believes there is nothing available and moves on*
- *If he/she realizes, he/she has to hit the next button again and again to load additional batches*

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Thanks From GIS WebTech!



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