



What's changed and what's to come in site location?

The Society for Location Analysis

Questions

1. Why is location analysis still peripheral?
2. What's changed in the last ten years?
3. How can we get bigger and better?
4. Is the promise of pervasive spatially aware customer analytics real?

We are a craft industry

- There are probably only about 300 of us doing this stuff for a living in the UK
- One French government department licenses more copies of GIS software than the entire UK retail sector
- Out of 50 GIS graduates from Leeds in 2009 one took a job doing SLA type work



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Why?

- The curse of geography
- We don't fully own any mission critical functions
- Senior managers with spatial/statistical backgrounds are rare
- Say this quietly....

...location is often just not that important (at the moment)



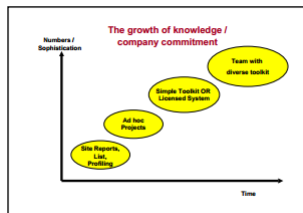
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What is the Same?

Government Policy Issues affecting Retail Location

Jonathan will discuss the many government policy issues affecting retail location including:

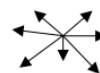
- Planning
- Regions
- Transport
- Congestion Issues



- Grabs from 2002/2003 slides from
 - Martin Callingham
 - Keith Dugmore
 - Scott Stevenson
 - Jonathan Reynolds

On going debates

Relationship between the internal stakeholders – who is the customer?
 Entry regulations
 Supplier/user divide
 Internal politics
 Awareness of external stakeholders
 Evolution of the Profession



Starting from scratch

- System
- Data

External

- Geodemographic
- Census
- Retail Catchments – Shopping Progn
- MHE – Store Performance
- Benchmarking and UK Shopping Index
- 'Clean Slate' – "Here's the data, what can we do with it?"

Internal

- Customer Postcodes
- Join to 'in-store' spend data
- Update Customer Profile
- Summarise into HMT, Importance Segments
- Departmental Profiles
- Update Store Catchments

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Other Opportunities for GIS

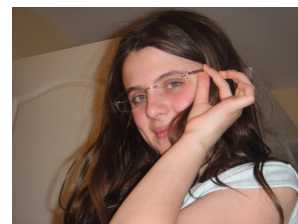
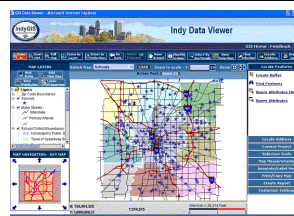
- Product Ranging – Commercial Planning
 - Specific Product Placement e.g. High Value Closures
- New Store Formats
- Marketing
- Recruitment
 - HR using catchment knowledge for recruitment advertising decisions
- Buying
 - Sharing more detailed customer knowledge

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What has changed?

- Mobile devices - candy bars to apps
- Social media - friends re-united to fb
- Internet retailing – sort of....
- Slippy maps – web mapping c2001 ack ☹️
- Open data and FOSS4G
- Cloud, big data and in-database analytics
- My children!



How do we break out?

- Two huge trends play to our strengths
 - Everything going mobile
 - Re-engineering of the distribution channel
- But these areas are currently 'owned' by non-spatial departments
- Organisational structures are persistent and cross cutting projects can be difficult, complex, and even career limiting
- But to grow we need to be doing this stuff



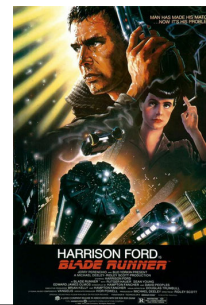
What sort of stuff?

- Logistics, home delivery, route optimisation
- Hyper-local push marketing
- Adjacent commercial functions, ranging, buying, customer analytics
- The majority of 'buying' still happens out the home
- Spatial modelling for use within LBS
- Sourcing and managing the potentially vast spatial databases required
- Choosing the right software frameworks
- But for something to change we too have to change



The Sunlit Uplands

- Historically distributive trades have focused on location analytics and distance selling on customer analytics
- Mobile and omni-channel retailing force these disciplines together
- The 1982 “Bladerunner” promise of LBS delivers



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How can we own this?

- Do more selling
- Take on risky new things, and sometimes fail
- Show sponsors working examples with money making or saving numbers
- Remember we are the best at this stuff
- Stay hungry, stay foolish

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