



Site Selection Trends

Rainmaker Event

Jason Hickey, President Hickey & Associates
September 19, 2019

LOCATION STRATEGY | LABOR BENCHMARKING & ANALYTICS | GRANTS & INCENTIVES
ADVISORY | SUPPLY CHAIN & LOGISTICS | WORKFORCE SOLUTIONS

Bangalore • New York • São Paulo • Chicago • San Francisco • Detroit • Las Vegas • Hong Kong •
Minneapolis • London • Bogotá • Washington DC • Phoenix • Boston • Singapore • Sydney • Mexico City

Introduction and Background

Founded in 1986 as one of the first companies to offer integrated site location and workforce services.

Today, as the global leader, H&A has active projects in every corner of the world utilising our more than 50 professionals, with additional Subject Matter Experts in key global markets.



400+

Annual Projects

\$3B+

Incentives Captured
/Managed

+31%

Average Cost
Savings

Our Value Proposition

What we offer our clients

H&A The Site Selection Company



Labor Benchmarking
& Analytics



Supply Chain
& Logistics



Grants &
Incentives

‘Delivering sustainable locational strategies for our clients around the world’



What are your clients thinking when
they select a location?





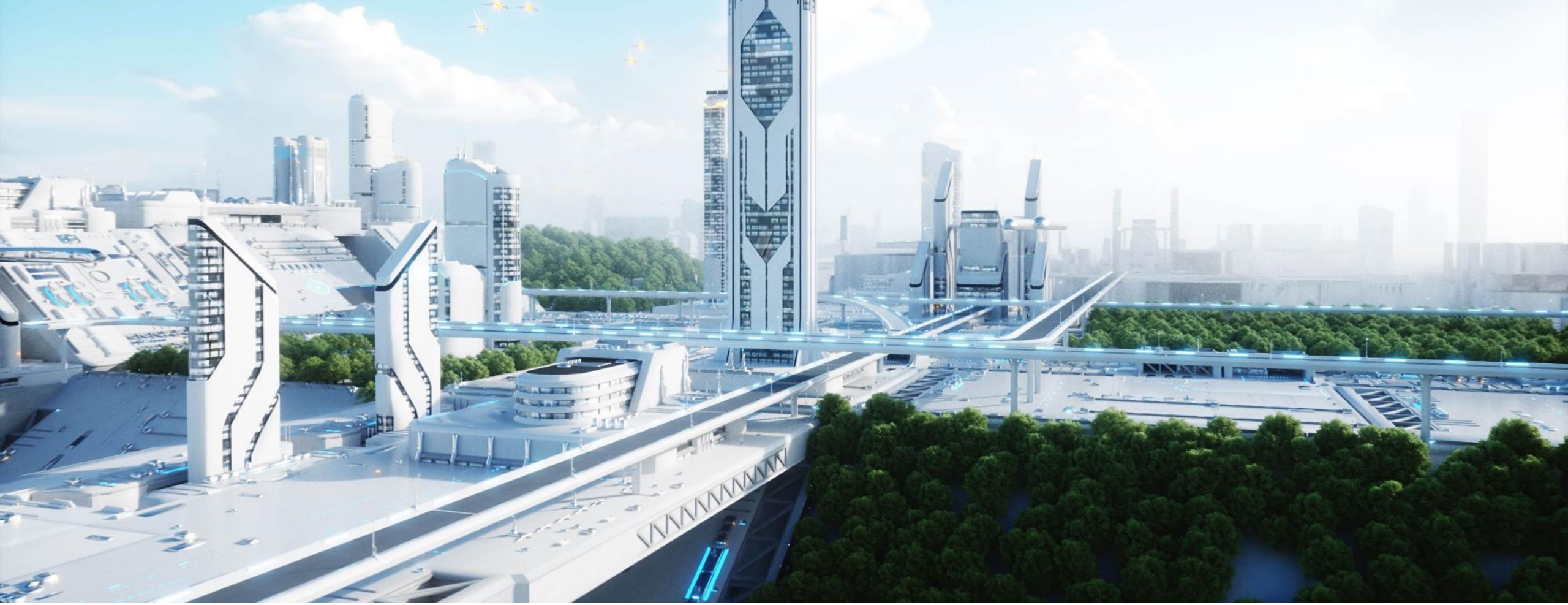
Where is our
Optimal
Location?

How can we
keep pace with
**change and
transformation**
in a dynamic
world?



How can I secure **Best Commercial terms?**

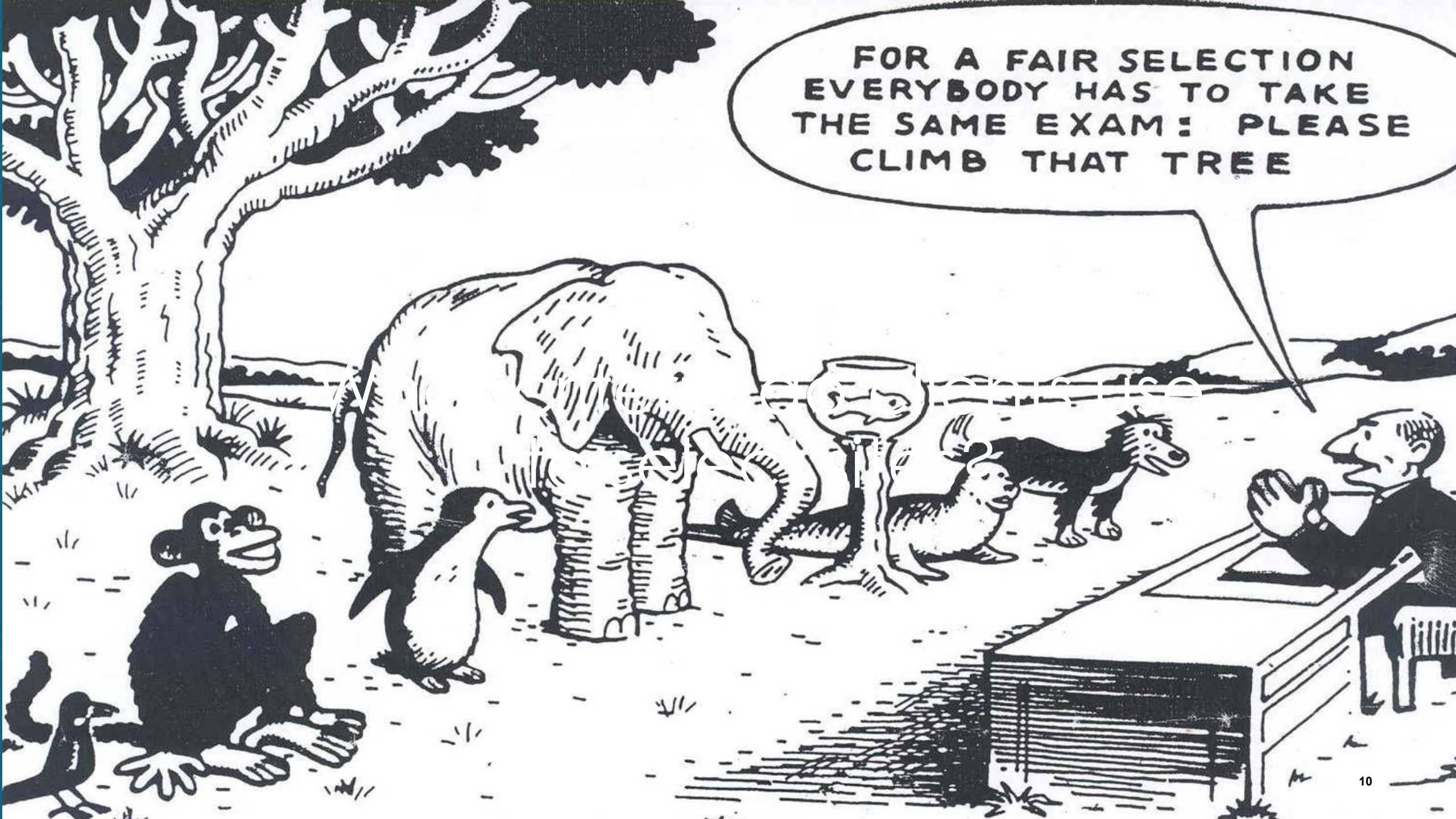




Where will our future workforce call home?



FOR A FAIR SELECTION
EVERYBODY HAS TO TAKE
THE SAME EXAM: PLEASE
CLIMB THAT TREE





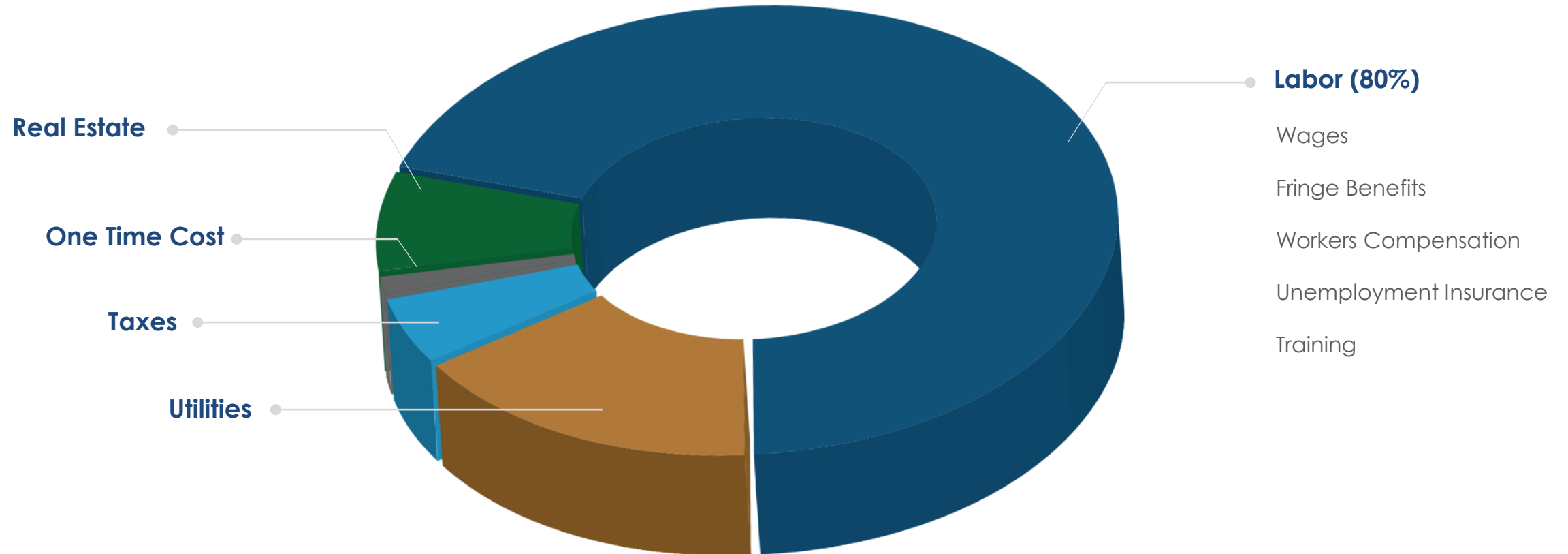
LOCATION TRENDS

DYNAMIC WORKFORCE LANDSCAPE

11

Using the right criteria when selecting a location?

Business operations are typically dominated by labor costs...up to 80%



Demographic Shifts

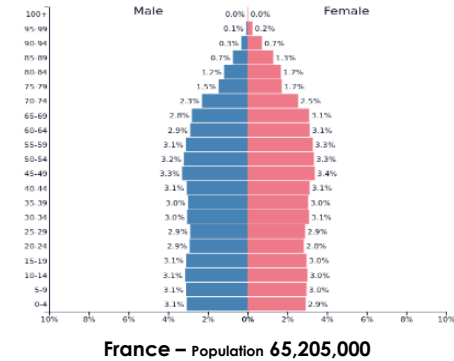
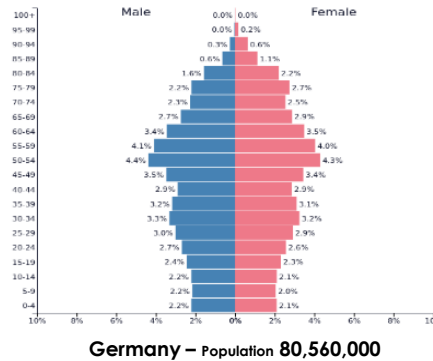
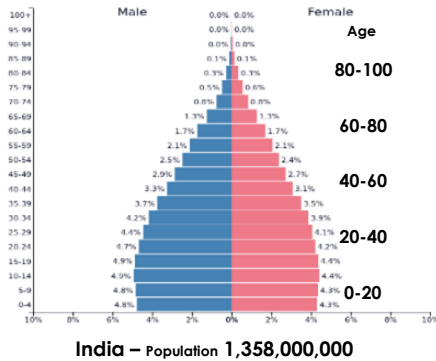
New Generational Workforce & Declining Populations

Young society beginning to develop
(India, Indonesia, Mexico)

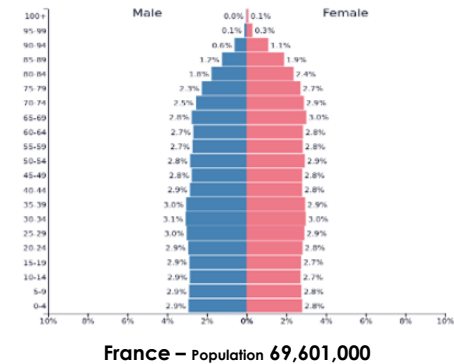
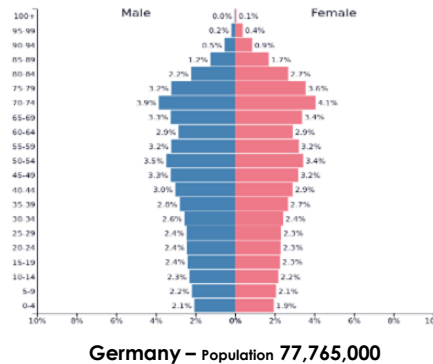
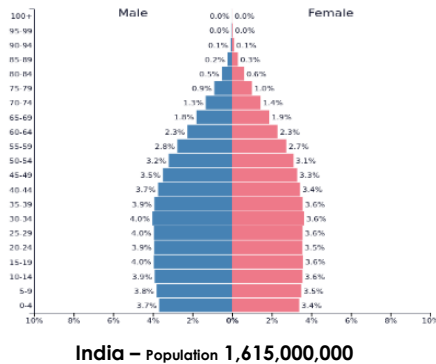
Rapidly aging society
(Germany, Japan, Romania)

Aging society – but relatively balanced
(France, US, UK)

2018

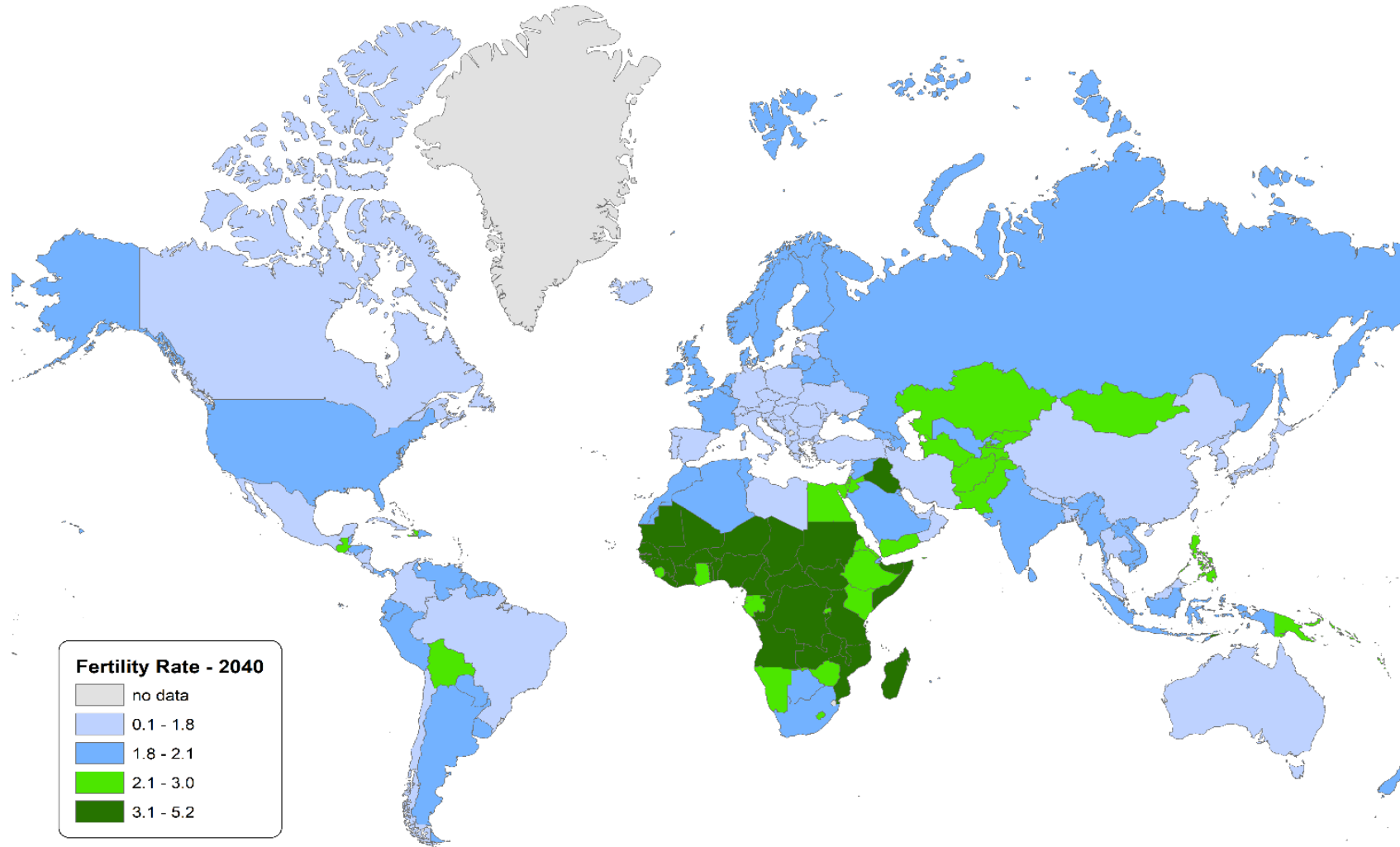


2038



Demographic Shifts

Declining Populations





Demographic Shifts

New Generational Workforce

TRADITIONALIST
(before 1946)

BABY BOOMER
(1946-1964)

GEN X
(1965-1980)

MILLENNIALS
(1981-1996)

GEN Z
(After 1997)

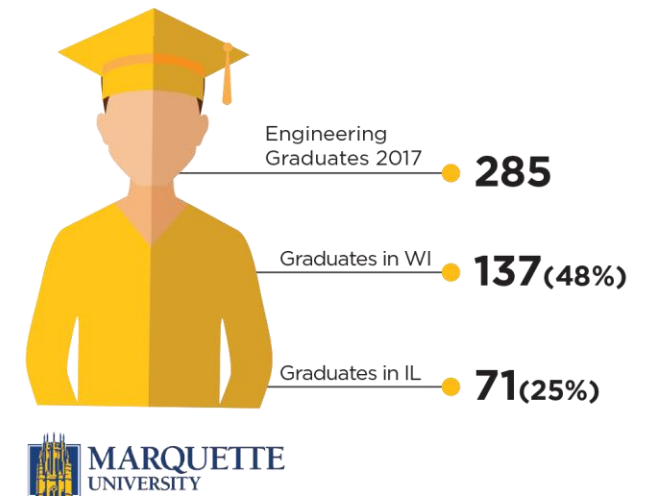
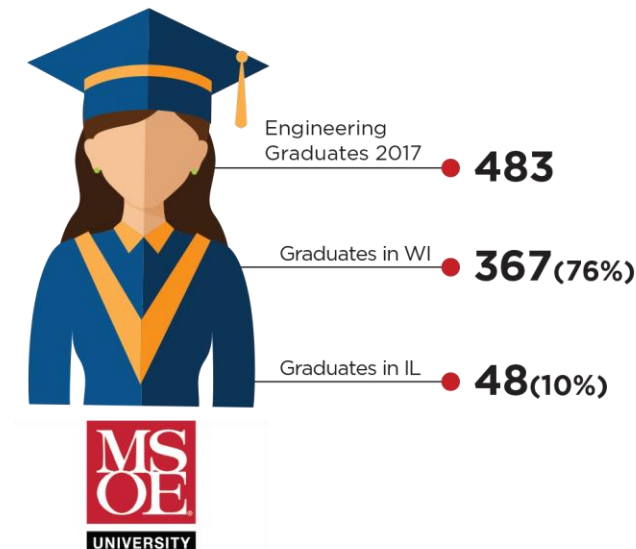
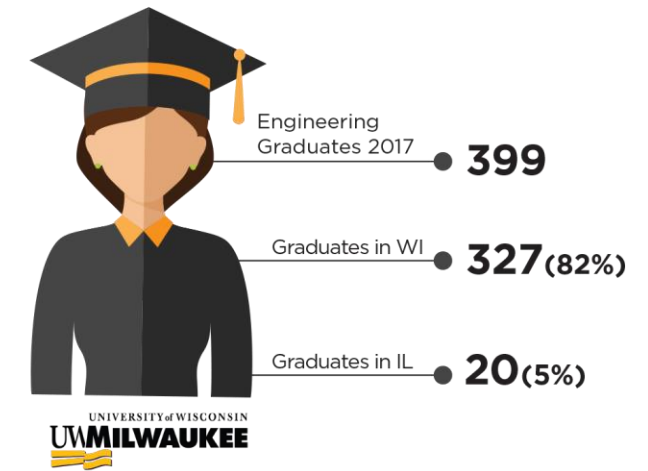
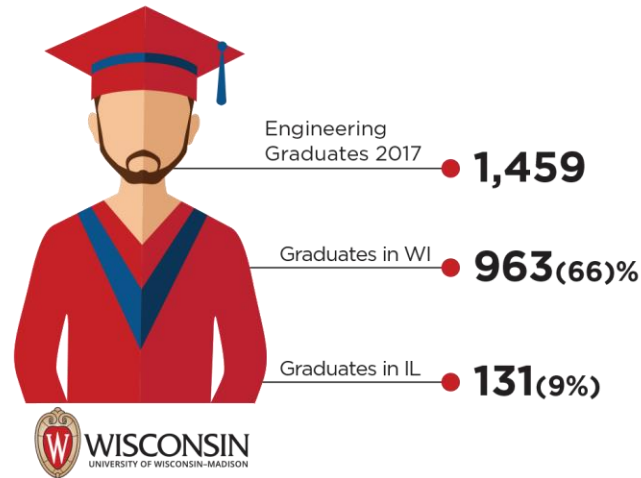


Milwaukee Workforce Trends

Engineering Wages and Talent Pipeline

Graduates of UW-Milwaukee and Milwaukee School of Engineering are most likely to stay in Wisconsin, while more graduates of UW-Madison and Marquette leave the state following graduation.

Nearly one in four Marquette graduates in 2017 moved to Illinois.

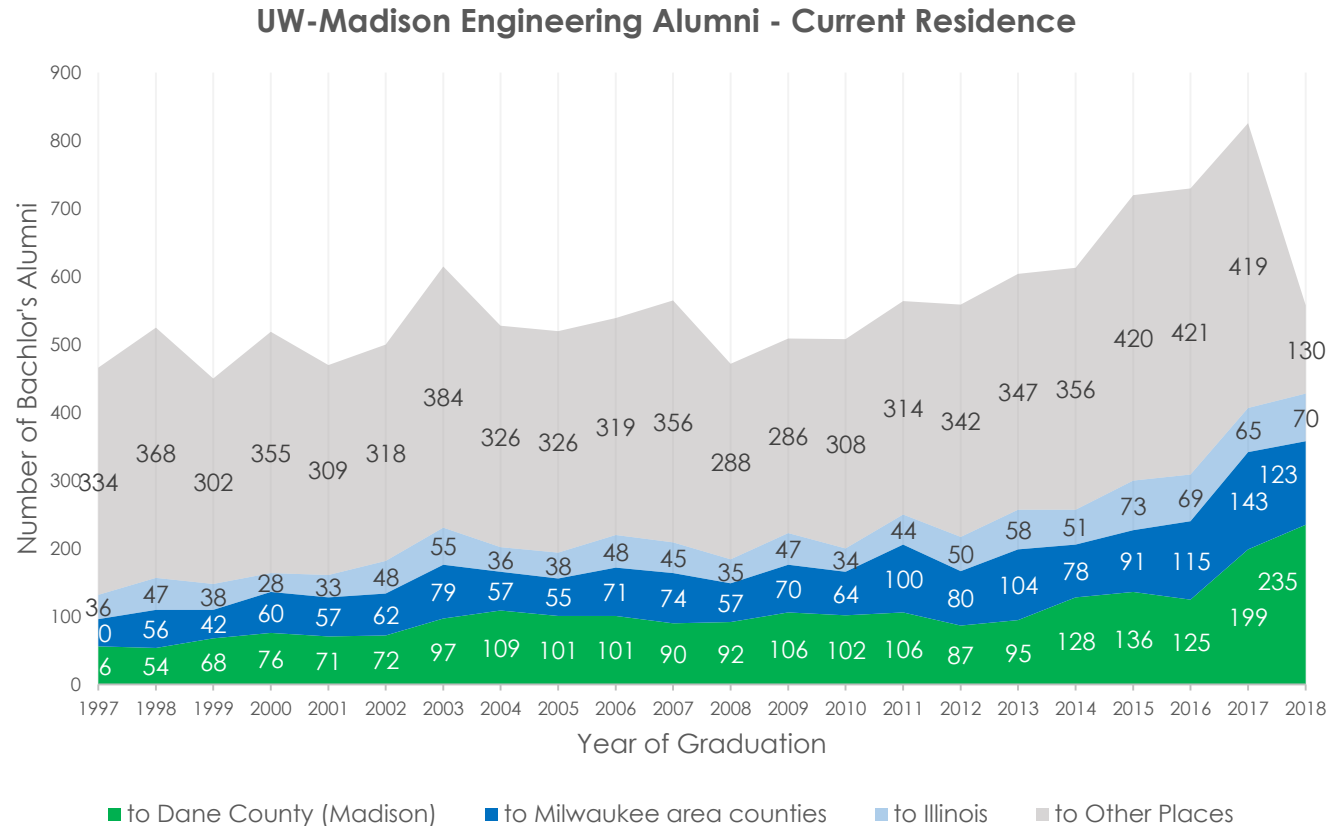


Milwaukee Workforce Trends

Engineering Wages and Talent Pipeline

The trend of graduates living in the Milwaukee area has increased over time.

Data shows that more UW-Madison graduates are increasingly likely to stay in Madison or move to the Milwaukee area.





LOCATION TRENDS

TRADE WARS & SITE SELECTION TRENDS

Trade Wars & Tariffs

Implications on FDI in a Constantly Changing Landscape



Donald J. Trump ✓

@realDonaldTrump



Tariffs have put the U.S. in a very strong bargaining position, with Billions of Dollars, and Jobs, flowing into our Country - and yet cost increases have thus far been almost unnoticeable. If countries will not make fair deals with us, they will be "Tariffed!"

6:11 AM - Sep 17, 2018

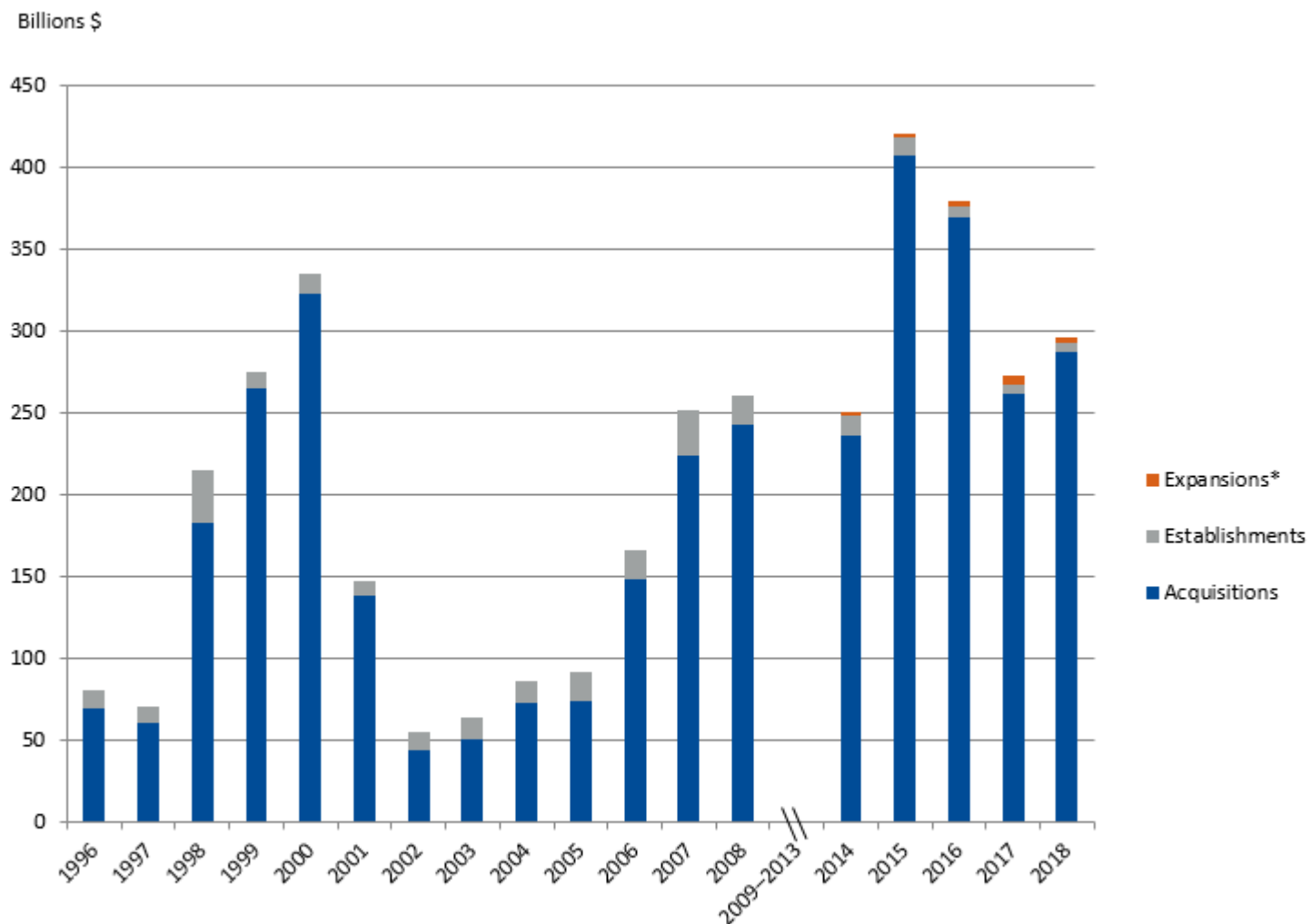
♡ 71.2K 💬 31.1K people are talking about this



Investment Into the USA

New Expansions

New Foreign Direct Investment Expenditures by Type, 1996-2018



*Expansions included in 2014-2018 only.

NOTE-Survey not conducted for 2009-2013.

U.S. Bureau of Economic Analysis



Q&A



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