



broadzone

The UK Geospatial Market 2017-2020

Industry analysis

Andrew Keevil

April 2017

Broadzone Consulting Ltd

Winchester, UK

www.broadzone.co.uk

hello@broadzone.co.uk

+44 1962 217137

Contents

Executive summary	2
Introduction	7
The fourth industrial revolution	7
The power of location	7
Spatial is no longer special	7
This report	7
Overall Market	9
Overall market size and growth	9
Customer segmentation	10
Typical customer revenues	11
Supply chain segmentation	11
Demand side – customers and usage	14
Central government	14
Census	14
Environment	14
Taxation	14
Disaster recovery	14
Highways	14
Health	14
Inland waterways	15
Coastal waters	15
Forestry	15
Local government	15
Planning	15
Asset management	16
School catchment and routes	16
Citizen reporting	16
Public Safety	16
Police	16
Fire	16
Ambulance	17
Energy	17
Smart metering	17

Oil and gas exploration	17
Siting renewable energy sources	17
Utilities	18
Network records storage and management	18
Works and asset management	18
Customer service	19
Operational intelligence	19
Regulatory reporting	19
Telecoms	20
Network records	20
Radio planning	20
5G	20
Final mile	20
Transport	20
Navigation and autonomous vehicles	21
Rail	21
Airports	21
Ports	22
Land and property	22
Agriculture	22
Architecture, engineering and construction	23
Insurance	23
Retail	24
Store location	24
In store experience	24
Supply chain	24
Marketing	24
Analysis of customers and markets	25
Campaign management	25
Customer engagement	25
Location based advertising	25
Supply side – data, software and services	26
Supply chain	26
Survey and data capture	27

<u>Traditional survey</u>	27
<u>Satellite imagery</u>	27
<u>LiDAR</u>	27
<u>Underground assets</u>	28
<u>Mobile devices</u>	28
<u>OpenStreetMap</u>	28
<u>Data sharing and collaboration</u>	29
<u>Data supply and aggregation</u>	29
<u>Data supply</u>	29
<u>Data aggregation</u>	29
<u>Data management and manipulation</u>	30
<u>Platform services</u>	30
<u>B2C platforms</u>	30
<u>B2B platforms</u>	31
<u>Software applications</u>	31
<u>GIS</u>	31
<u>GIS applications</u>	32
<u>IT consulting services</u>	32
<u>Analysis: key trends and their impact</u>	34
<u>Saturation of the traditional enterprise solutions market</u>	34
<u>Geospatial data is becoming ubiquitous</u>	34
<u>Time will matter – more and more</u>	34
<u>Machine learning will automate routine tasks</u>	35
<u>Software as a service fundamentally changes the business model</u>	35
<u>The cloud platform fundamentally changes the delivery model</u>	35
<u>A digital market for data will emerge</u>	36
<u>The supply chain is morphing into an ecosystem</u>	36
<u>Selected Vendors</u>	38
<u>UK Players</u>	38
<u>Cadcorp</u>	38
<u>emapsite</u>	38
<u>Esri UK</u>	38
<u>Experian</u>	39
<u>Landmark Information Group</u>	39

Ordnance Survey	40
Royal Mail	41
1Spatial	41
International players	41
Airbus	41
CARTO	42
DigitalGlobe	42
HERE	42
GE Smallworld	43
Google	43
Hexagon Geospatial	43
Microsoft	43
Pitney Bowes	44
Planet Labs	44
TomTom	44
About this report	45
Broadzone	45
The author	45
Glossary	45
Disclaimer	46

List of Figures

Figure 1: UK geospatial market revenues.....	9
Figure 2: UK geospatial market revenues by customer segment.....	10
Figure 3: Indicative spend levels – major customers.....	11
Figure 4: UK geospatial market 2017 - value stack.....	12
Figure 5: Geospatial supply chain.....	26
Figure 6: Layers of data in a GIS.....	31
Figure 7: Geospatial supply ecosystem.....	37

About this report

Broadzone

Broadzone Consulting Ltd is a technology industry consulting business that focuses on industry analysis, strategy and marketing. Broadzone provides industry and market research that is independent and robust. With an in-depth understanding of the market drivers, competitive landscape, regulatory constraints, technology capabilities and customer needs, Broadzone gets to the heart of the issue. Broadzone has considerable experience creating B2B marketing propositions, supported by compelling messaging and impactful content marketing. Our expertise in the technology and infrastructure sectors includes utilities, energy, logistics, telecoms and IT.

The author

Andrew Keevil is the founder of Broadzone, Managing Consultant and a senior industry analyst with 25 years' experience in technology industries. Andrew provides technology companies with advice and execution support for research, strategy and marketing. He has deep expertise in the GIS and geospatial technology market. His industry experience includes management roles client-side with major players such as Ford, Motorola, Vodafone, Esri and SupportSoft (now Aptean). His consulting experience spans the water, gas, electricity utilities and telecoms, IT and technology sectors. Andrew is a Chartered Engineer and MBA.