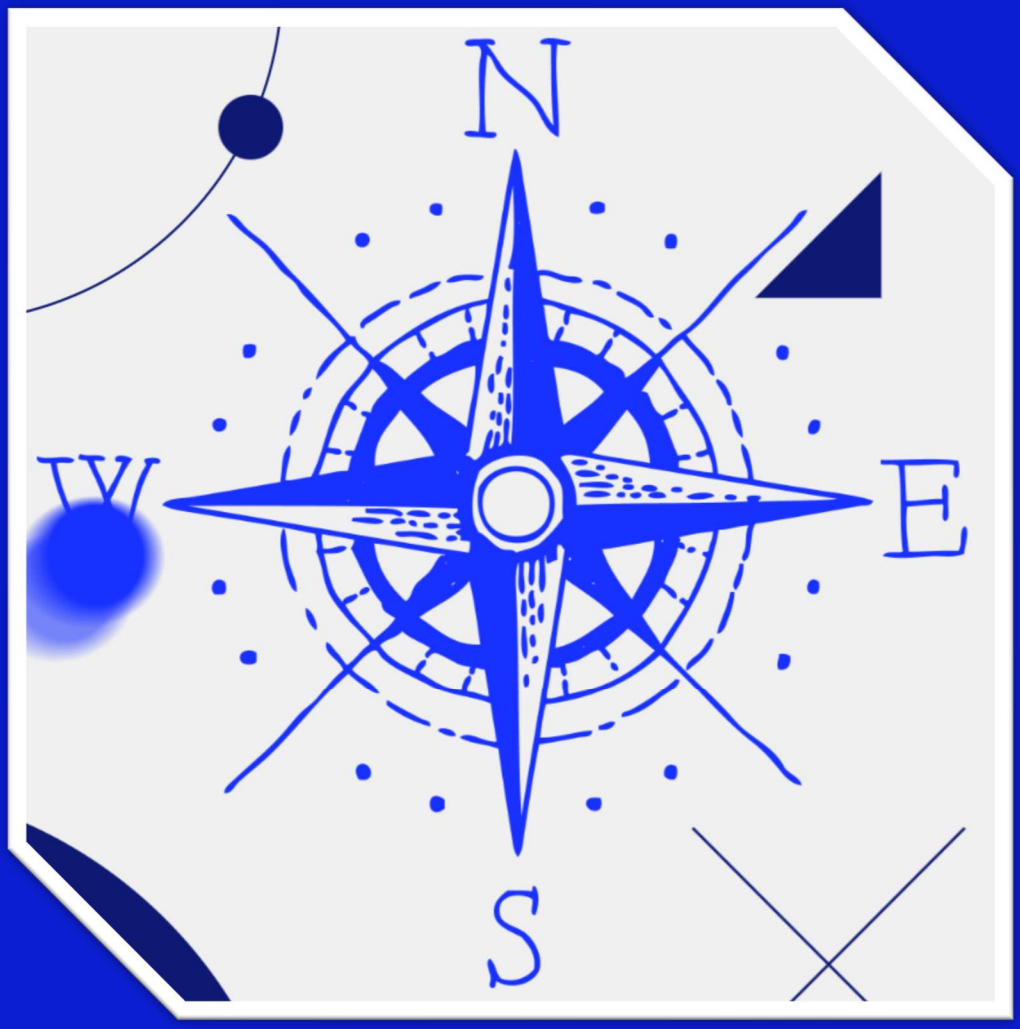
GUIDE TO THE LOCATION INTELLIGENCE MARKETPLACE



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01 ABOUT THIS REPORT

This report is a compilation of observations of the commercial Location Intelligence (LI) marketplace, which encompasses geospatial technology's various markets, submarkets and disciplines. The goal is to categorize and map the companies of the Location Intelligence Marketplace with global representation. Consider this report a snapshot in time as everything is about to change in the AI era. Consider this as a reference point for future discussion and debate, and the foundation for future versions.

The marketplace for LI solutions is divided into two primary markets, DATA and SOFTWARE. Products from each market are used in developing applications or solutions (Refer to the OVERVIEW Market Map on Page 4): Data refers specifically to location-based data and SOFTWARE is inclusive of enterprise, SaaS, desktop, APIs or other derivative software solutions that can manage, analyze and visualize geospatial primitives (points, lines and areas) referenced to a position on the Earth's surface. Within these two primary markets there are 13 submarkets, each representing geospatial technology products or services. Within each submarket, this report provides a sample of companies that are presented in the Market Maps within this document.

In total, there are over 150 companies listed here, though according to this author's research, close to 1000 companies are providers of products and services globally. In addition, this report includes a list of over 40 professional organizations and a list of more than 175 venture capital or private equity firms that are currently or have in the recent past provided financial backing to companies in the marketplace. So, while the report is not exhaustive, the analysis represents a significant part of the overall marketplace. The market for LI data and software is growing as more users and companies find value in the applications and perspectives offered by understanding proximity relationships and hence the interest from the investment community. Links to each LI company or organization in the report can be found in APPENDIX 2.

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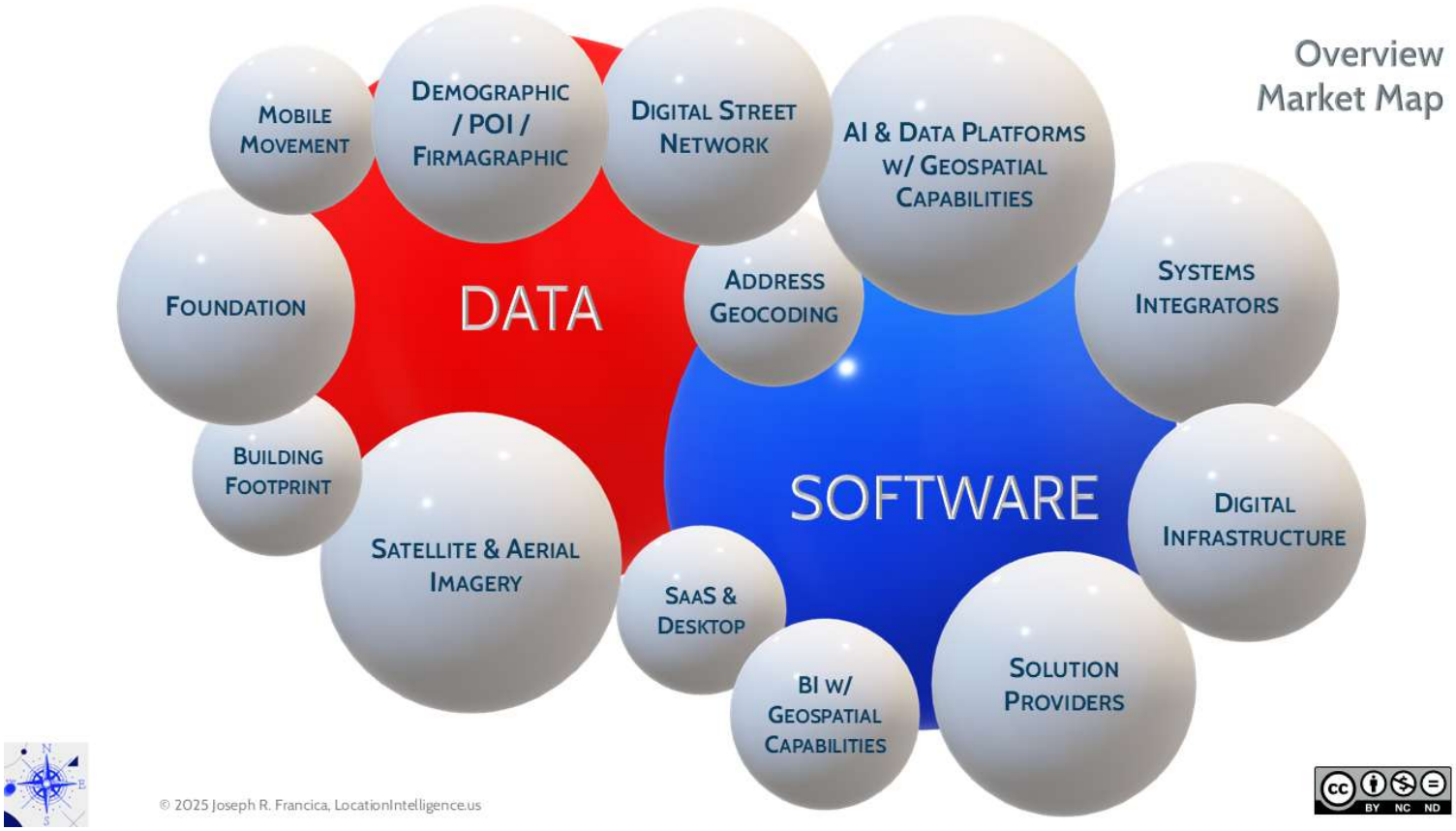
02 MARKET MAPS

Refer to the OVERVIEW Market Map #1 below and throughout this report find the submarket maps in APPENDIX 1. The goal of the Market Maps is to represent the major LI markets, DATA & SOFTWARE, and submarkets, represented by the gray "spheres," as accurately as possible and to place companies and organizations into each sphere that are illustrative of those submarkets. An added REFERENCE Market Map #2 (See APPENDIX 1) is provided because it was important to acknowledge companies with overlapping capabilities such as Esri, Precisely, Hexagon and others.

OVERVIEW – MARKET MAP #1



There is relevance to the juxtaposition of each submarket sphere to other submarkets. The *size* of each sphere is a qualitative interpretation and related to their importance to the

marketplace but not related to a specific total revenue sizing (See MARKET SIZING section below) of the companies represented, though this may be considered for future marketplace versions.

The major markets, DATA and SOFTWARE, are **not** considered to have equal impact within the LI marketplace. DATA is juxtaposed slightly "above" SOFTWARE in the Market Map and reflects that "data" are more important today and are expected to grow in significance in the AI era. Services are **not** considered as a separate, major market because the business of offering services will rely on either software or data, or both, as part of the overall solution. The submarkets of Systems Integrators and Solution Providers that develop customized services are placed within the SOFTWARE market to recognize the expertise necessary to deliver software solutions, first, and the integration of data products second.

03 DEFINITIONS & OBSERVATIONS

This report defines the Location Intelligence (LI) Marketplace as follows: **Location Intelligence is an information technology sector for the management, analysis and visualization of location-based data that uses geospatial technology**. It is important to recognize the LI marketplace in the context of other information technology sectors because **by combining location-based data with other attributes of the data, geographical patterns and proximity relationships emerge that would otherwise remain unrecognized and business insights missed**. This is what makes the LI marketplace unique among other IT sectors. It is also why LI is considered a niche technology sector occupied with specialists in geographic information systems. The market is dominated by only a few companies in both software and data. There are significant competitive barriers that have prevented companies from gaining market share on the market leaders including financial and technical. For example, while the cost to launch Earth observation (EO) satellites has come down significantly and the payload weight of satellites reduced from 5000Kg to 50kg, the cost to process, analyze and market EO data is substantial, and most of this is in educating the end users as to the utility and business advantage it affords.

This analysis of the LI Marketplace is inclusive of all industry segments for which users will find applications for retail, banking, capital markets, real estate, telecommunications, utilities, transportation, insurance, healthcare as well as those closely associated with federal, state, provincial and local government such as urban planning, emergency management and many others.

Location Intelligence is more than just digital mapping technology but maps, in whatever graphical form, provide a medium for data visualization and interpretation and are substantially additive to today's focus on data analytics. In the AI era, data are the fuel driving large language models (LLM) and large geospatial models (LGM) and software provides the answers to queries asked of AI chatbots.

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