

NGAC
FALL 2011
ASPRS 10 Year Industry Forecast



Cape Hatteras
Light House

Charles Mondello, DCTO
Pictometry International
Chair ASPRS Industry Forecast



A Perspective of our Industry

Bodie Island
Light House

Briefing Agenda

- Discussion of industry direction
- Critical Use versus Needs
- Change within the workforce

Ponce de Leon Inlet
Light Station

Direction: Results from ASPRS 10 Year Industry Forecast

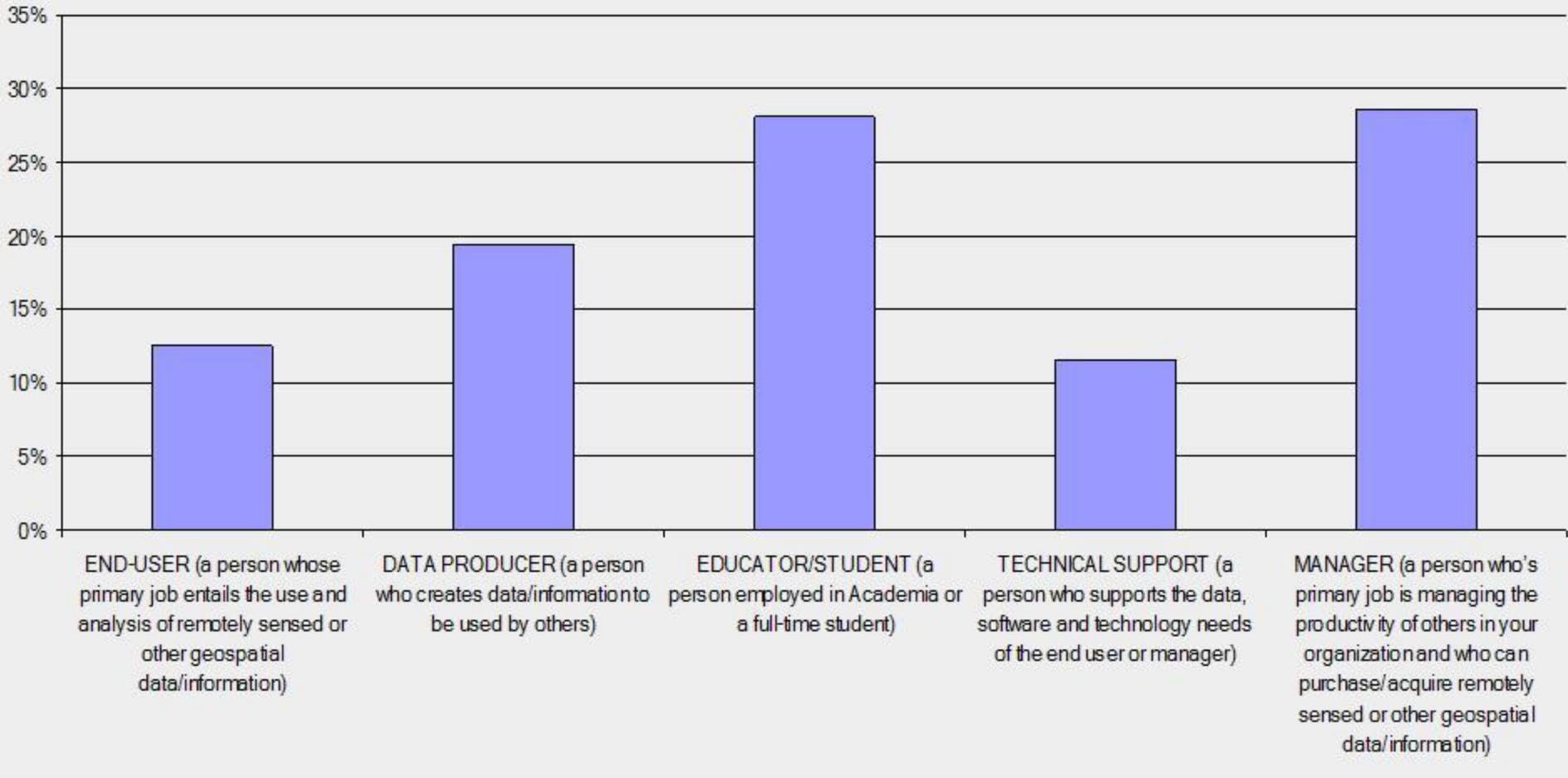
- Phase VI of the study started initially in 1999
 - NGA and USGS partnered with ASPRS for Phase VI
 - Questions developed to answer workforce issues and retain continuity with past studies

Lake Ontario Light House
Oswego, NY

Events in Mapping

- Many events have occurred to affect the world of mapping
 - Consumer mapping
 - Sharing & Access
 - Digital acquisition and manipulation technologies
 - Data
 - Partnered funding
 - More with less
 - Budget pressure
 - Partnered funding
 - More with less
 - Aging Workforce

What is your PRIMARY job function? Please select one.



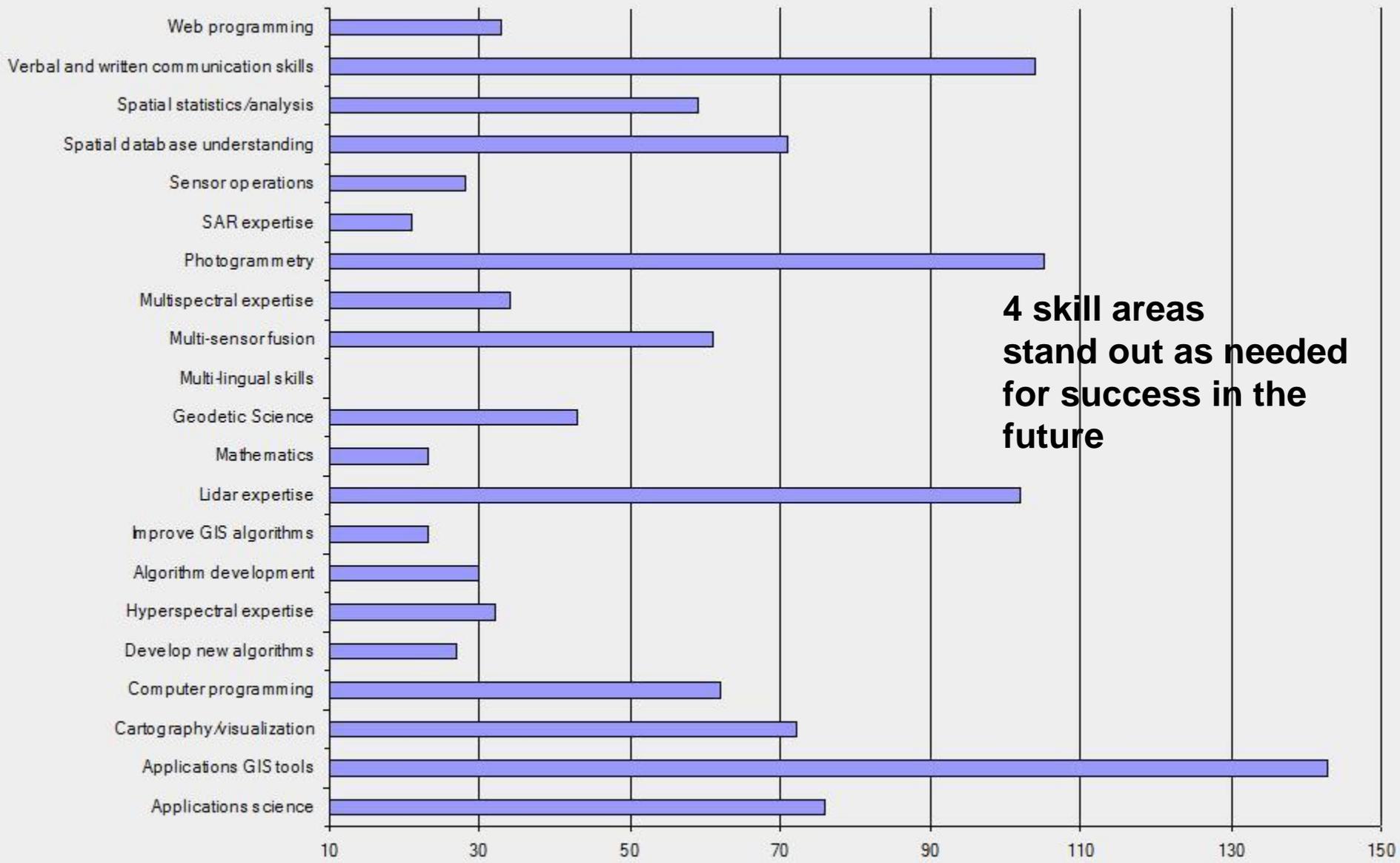
Snapshot of Respondents

All - Combined

Answered Question 441

Skipped Question 9

Please rank the four most critical knowledge areas/technical skills needed by your employees for the future?



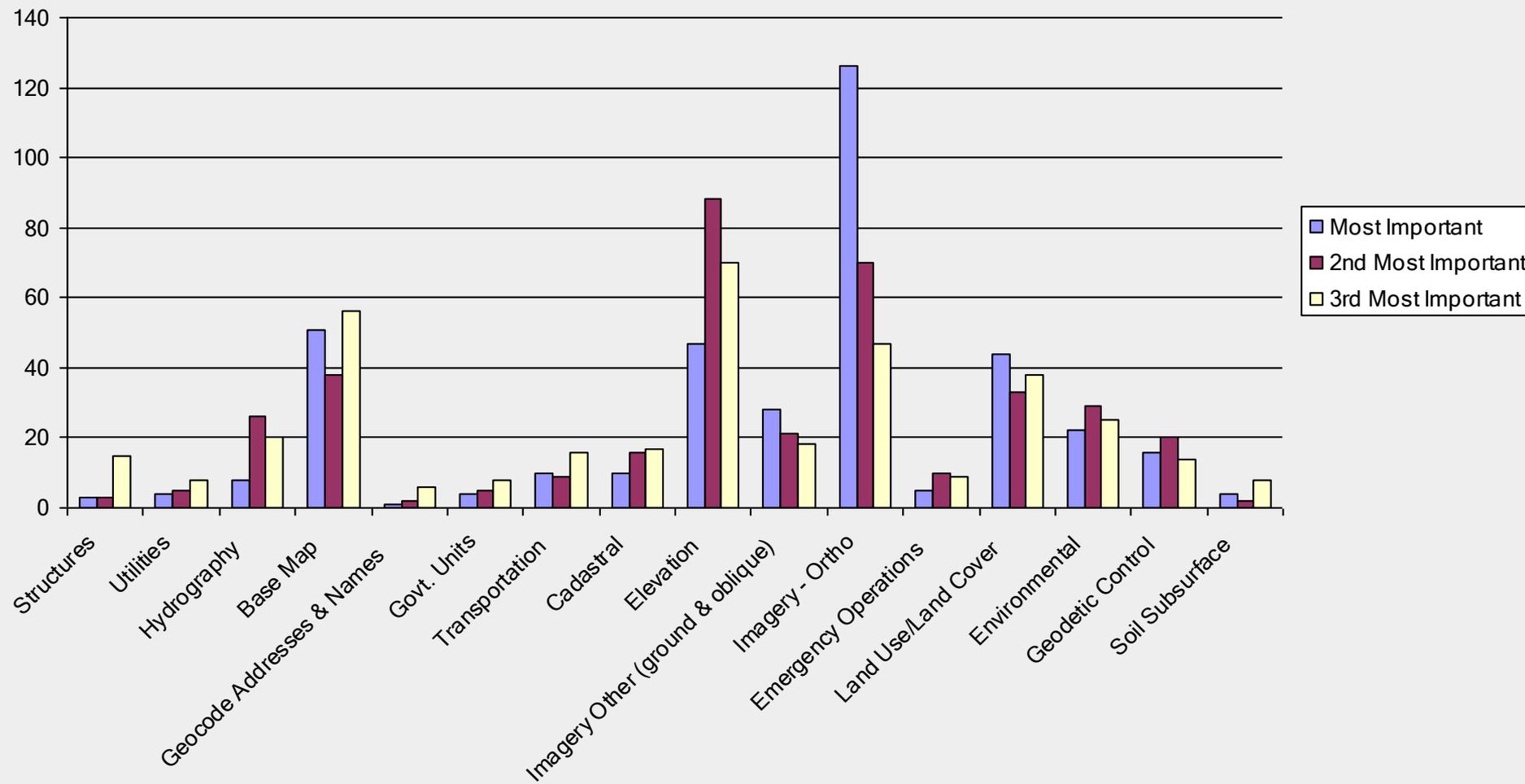
4 skill areas stand out as needed for success in the future

All - Combined

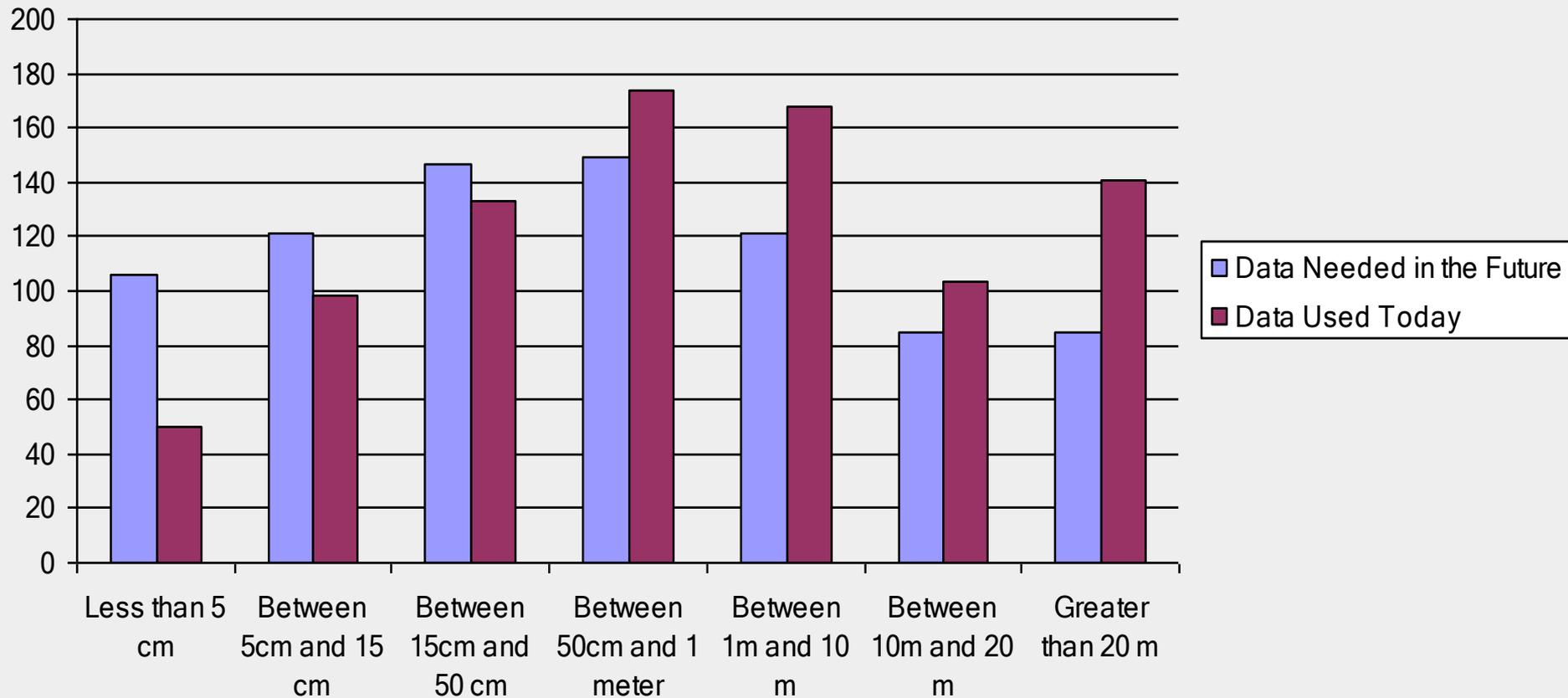
Answered Question 295

Skipped Question 155

Which of the following are the three MOST important geospatial data layers that you currently use?



What levels of Spatial Resolution do you currently WORK WITH today? What levels of Spatial Resolution do you NEED most to do your job? (Could be the same - check all that apply)

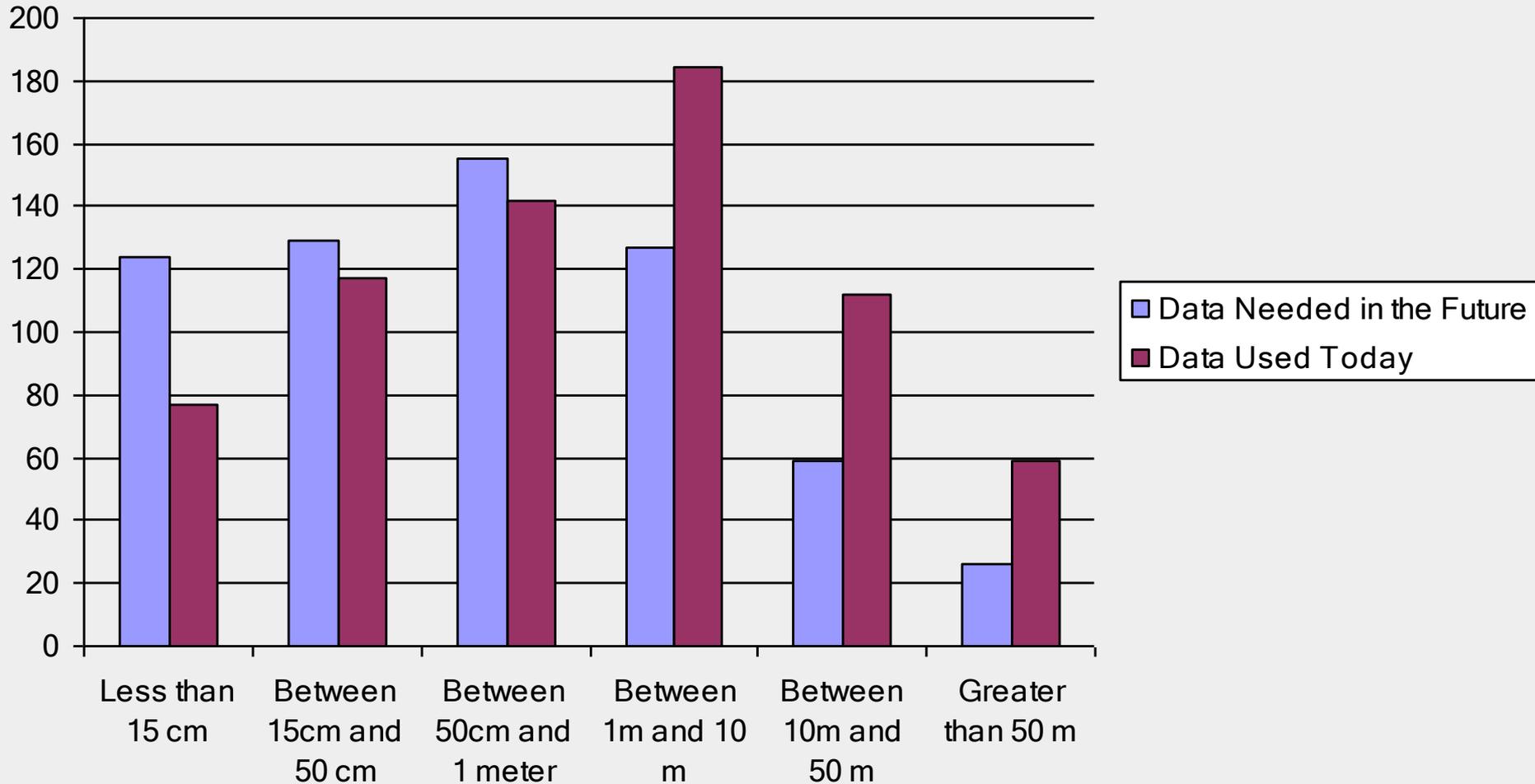


Use versus need define possible shortfall and overcapacity as well

Answered Question 377

Skipped Question 73

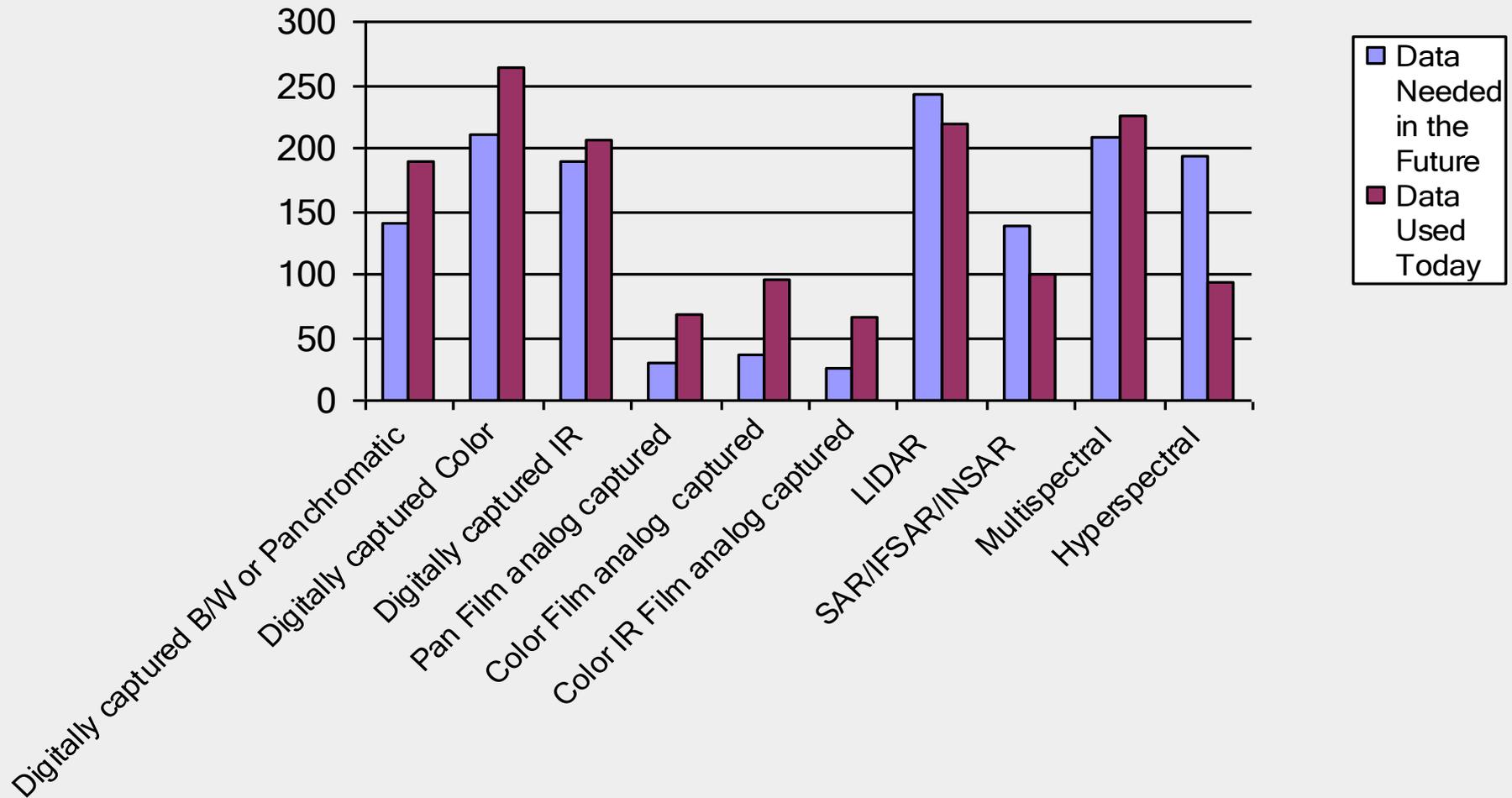
What levels of geo-locational accuracy do you currently WORK WITH today? What levels of geo-locational (horizontal) accuracy do you NEED most to do your job? (Could be the same - check all that apply)



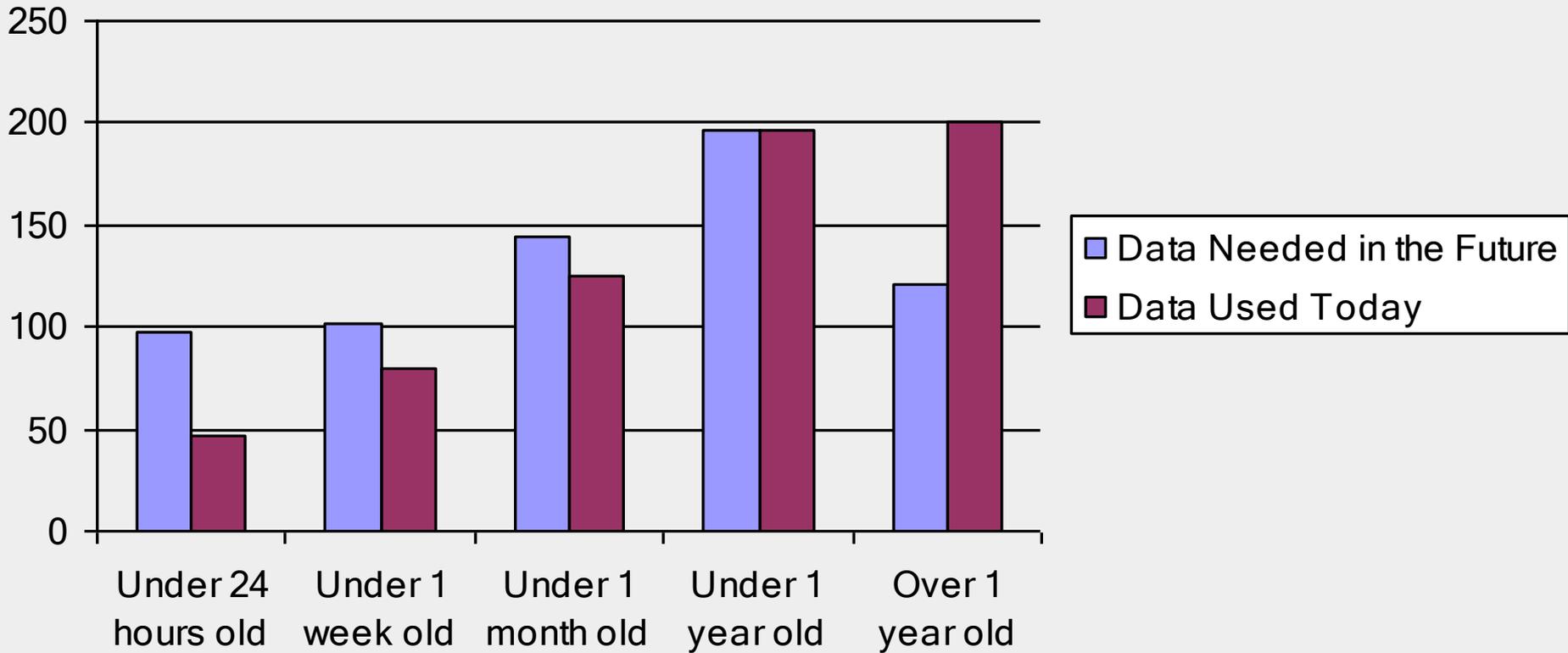
Answered Question 369

Skipped Question 81

What image/sensor types do you currently WORK WITH today?
 What image types do you NEED most to do your job? (Could be the same - check all that apply)



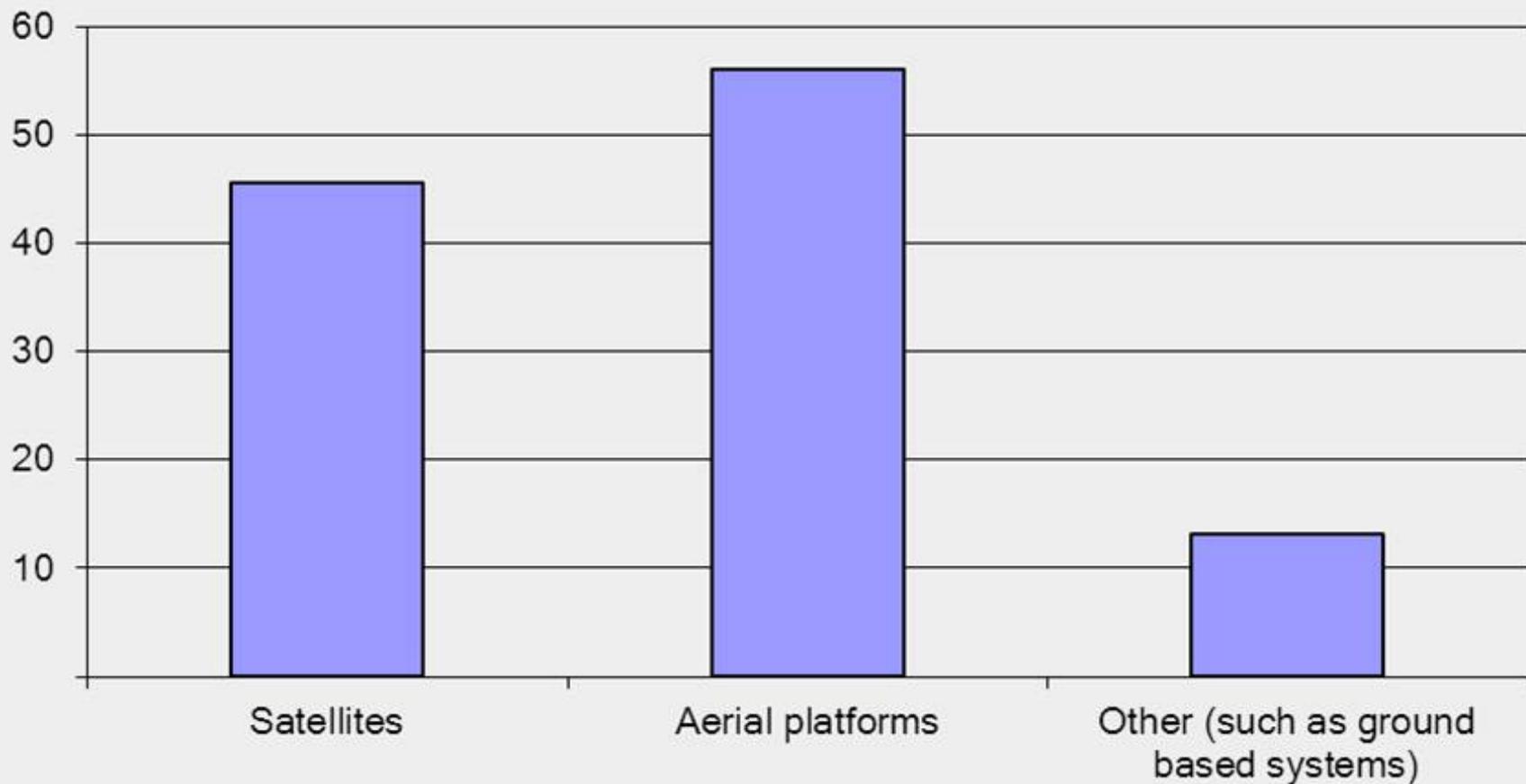
How current are the PRIMARY data sets that you WORK WITH? How current do you NEED your data to be?



Answered Question 367

Skipped Question 83

What proportion of your remote sensing data/information is collected by aerial platforms vs. space-based collection?

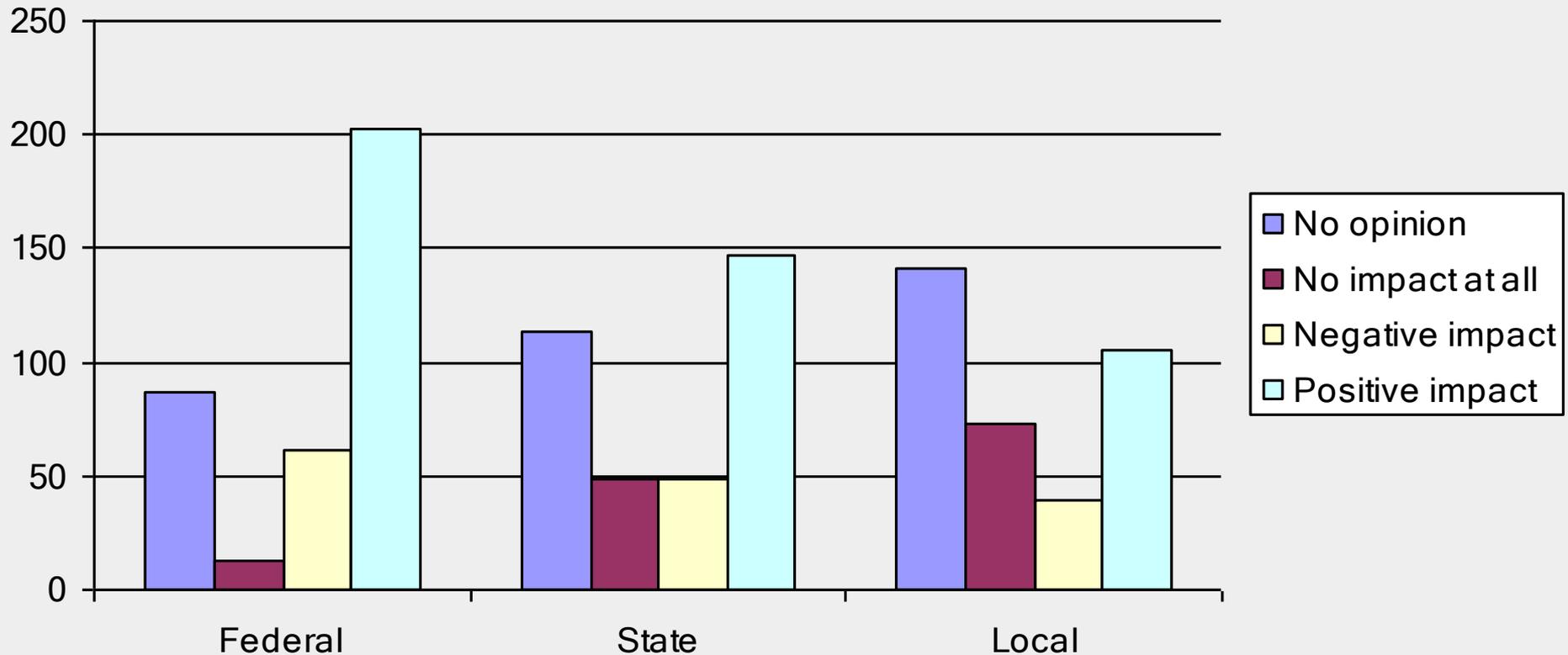


Big change is growth of “other”

Answered Question 367

Skipped Question 83

In your opinion, how do government policies at various levels affect the U.S. geospatial community?

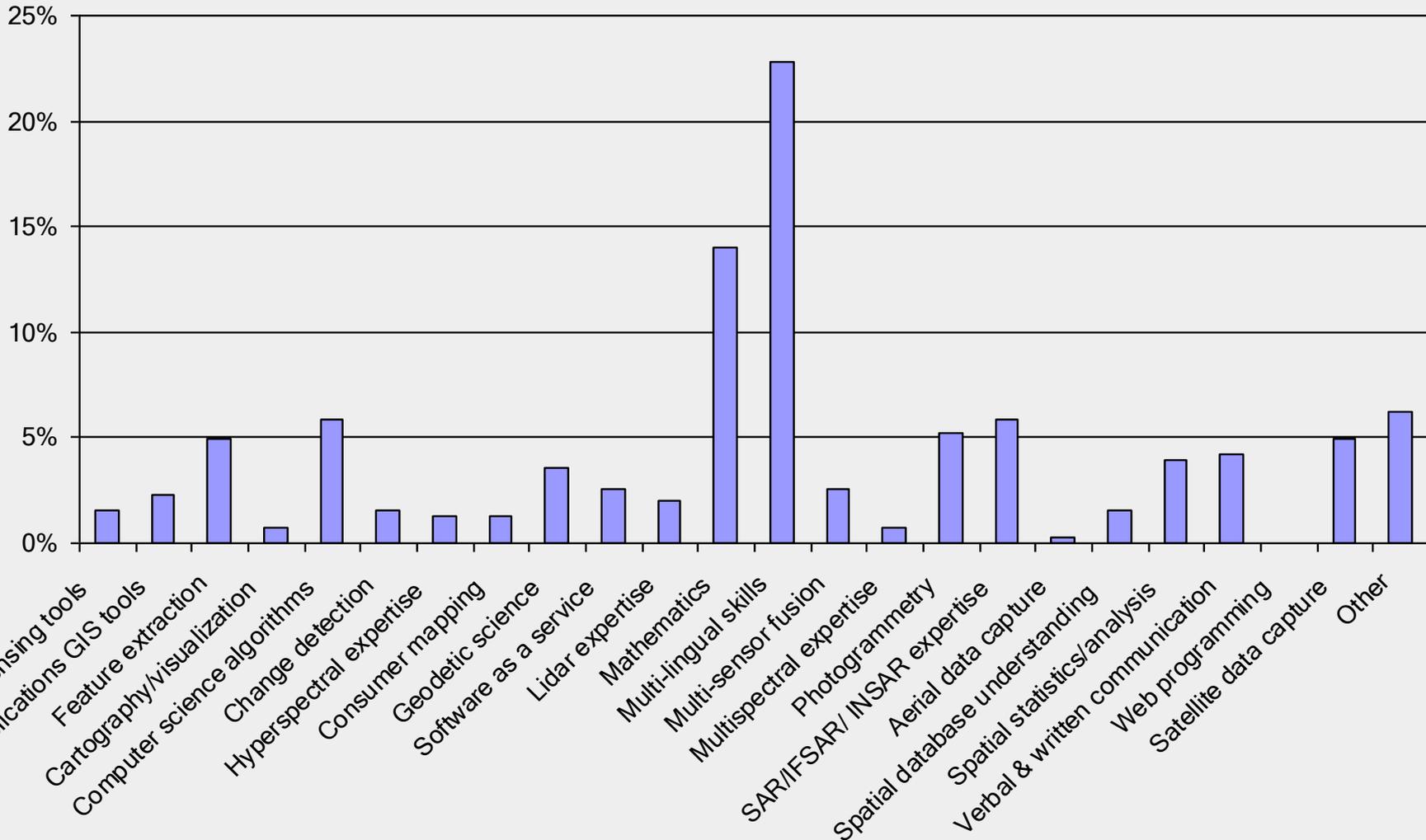


An improvement over previous perception

Answered Question 365

Skipped Question 85

In which area do you see the single greatest expertise shortfall in the U.S. in the future?

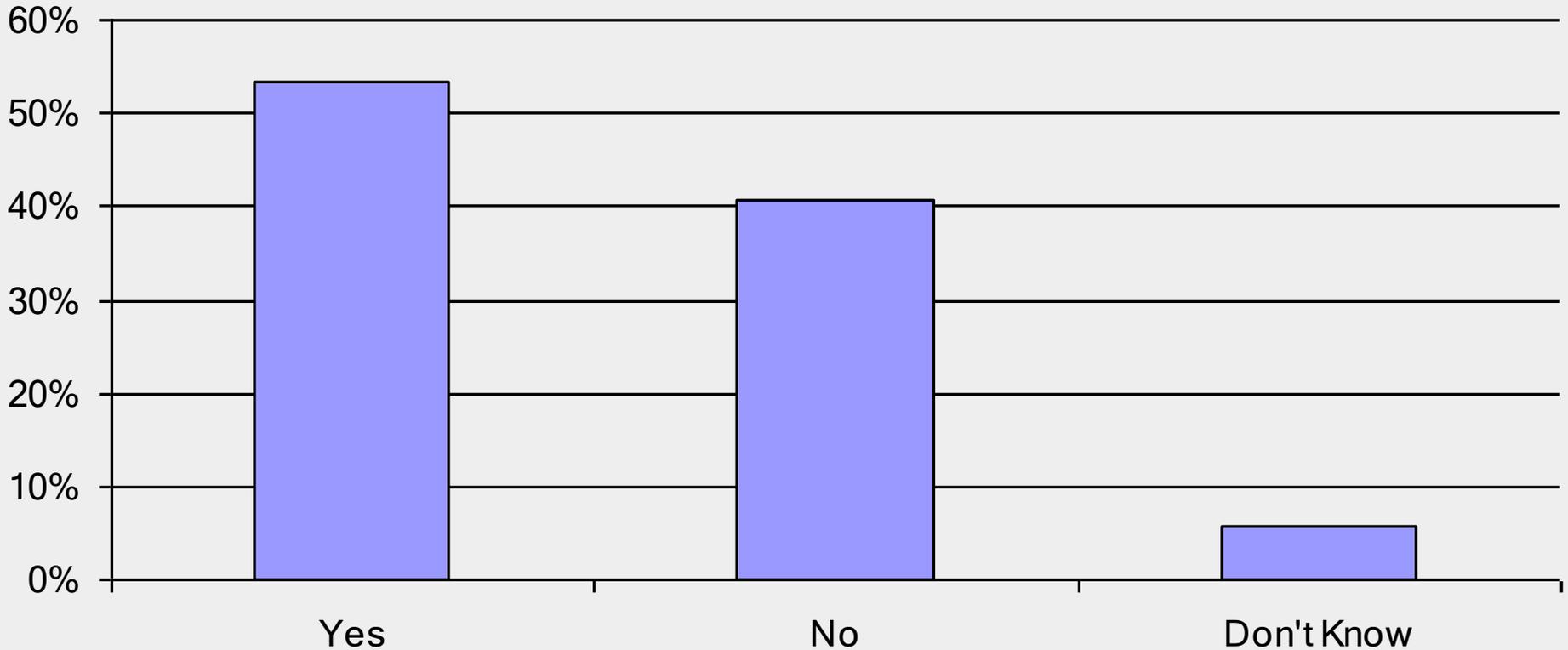


The importance of language shows the criticality of a global marketplace, math shows a failure of fundamentals in education

Answered Question 307

Skipped Question 143

Does your Employer perform work that requires governmental SECURITY CLEARANCES?



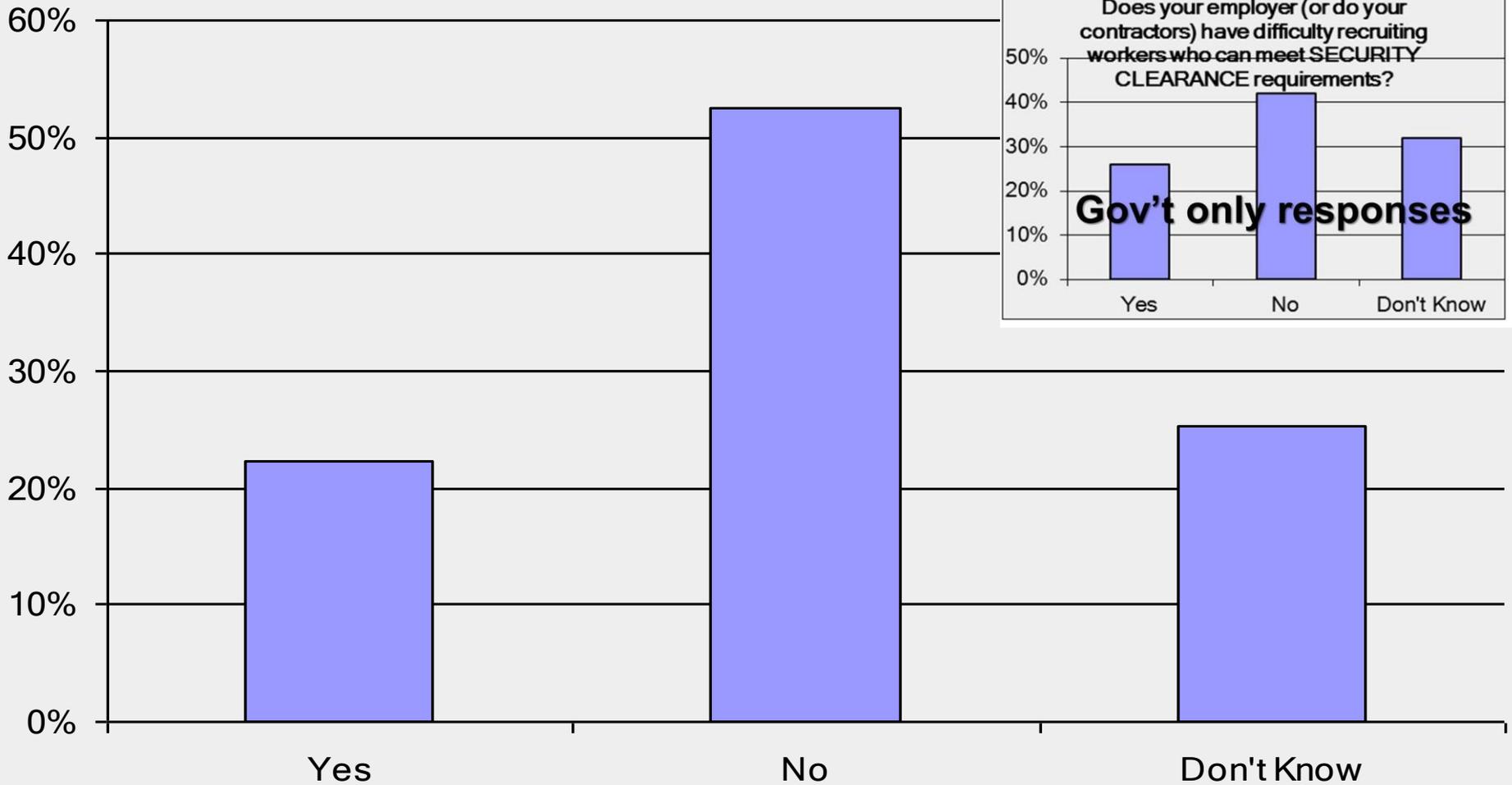
One of the focus areas for the study

All - Combined

Answered Question 297

Skipped Question 153

Does your employer (or do your contractors) have difficulty recruiting workers who can meet SECURITY CLEARANCE requirements?

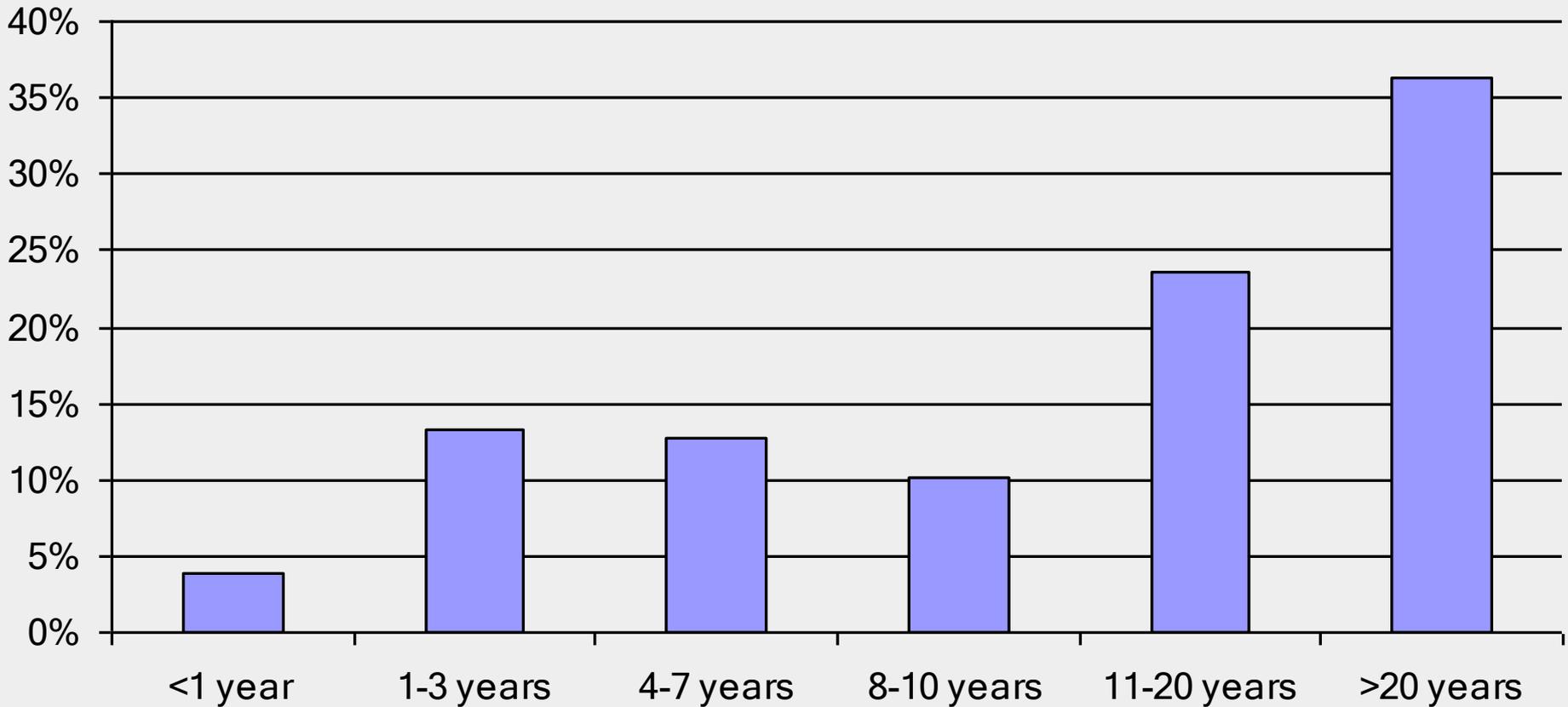


All - Combined

Answered Question 158

Skipped Question 292

How many years of remote sensing experience do you have?

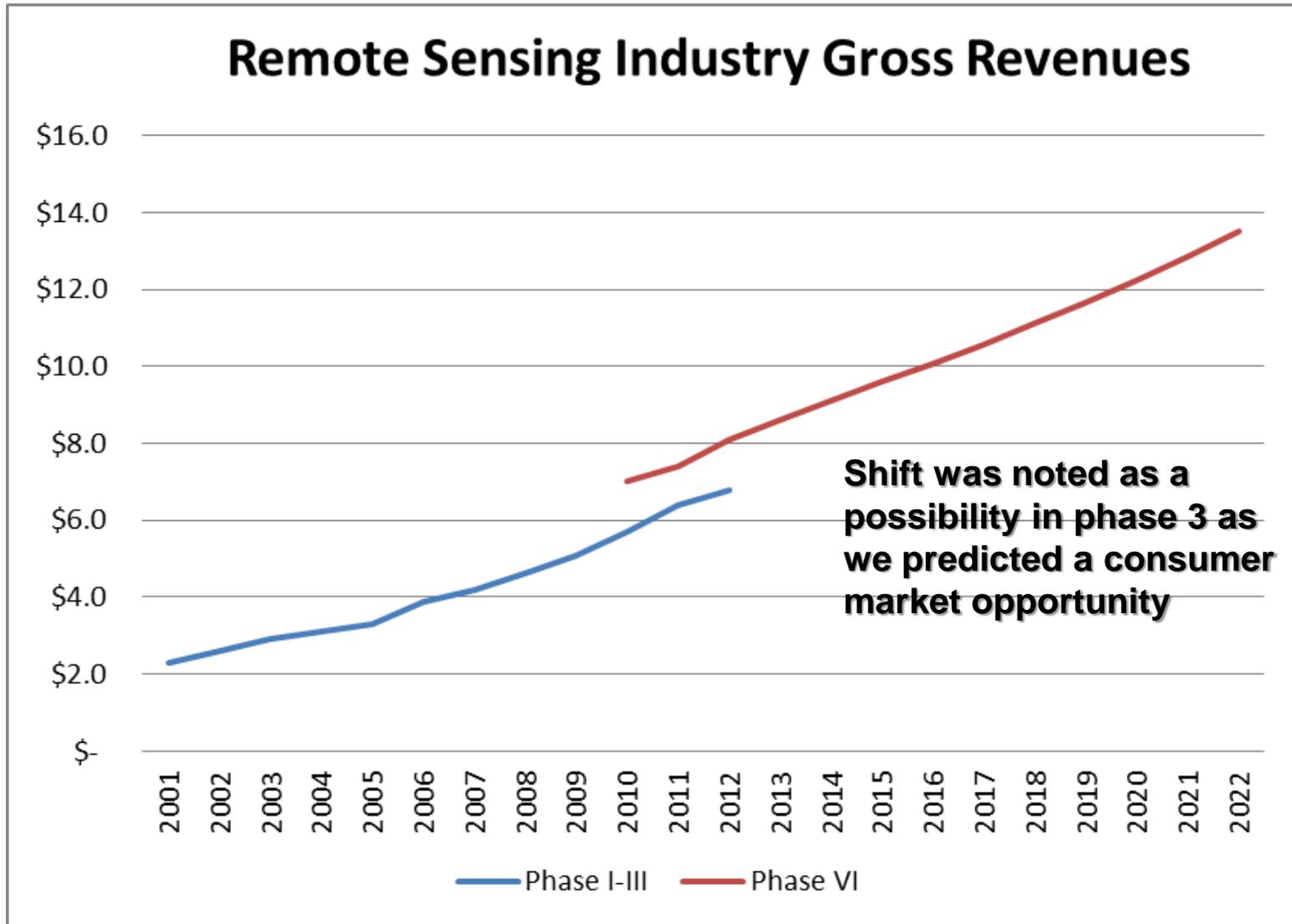


An aging workforce

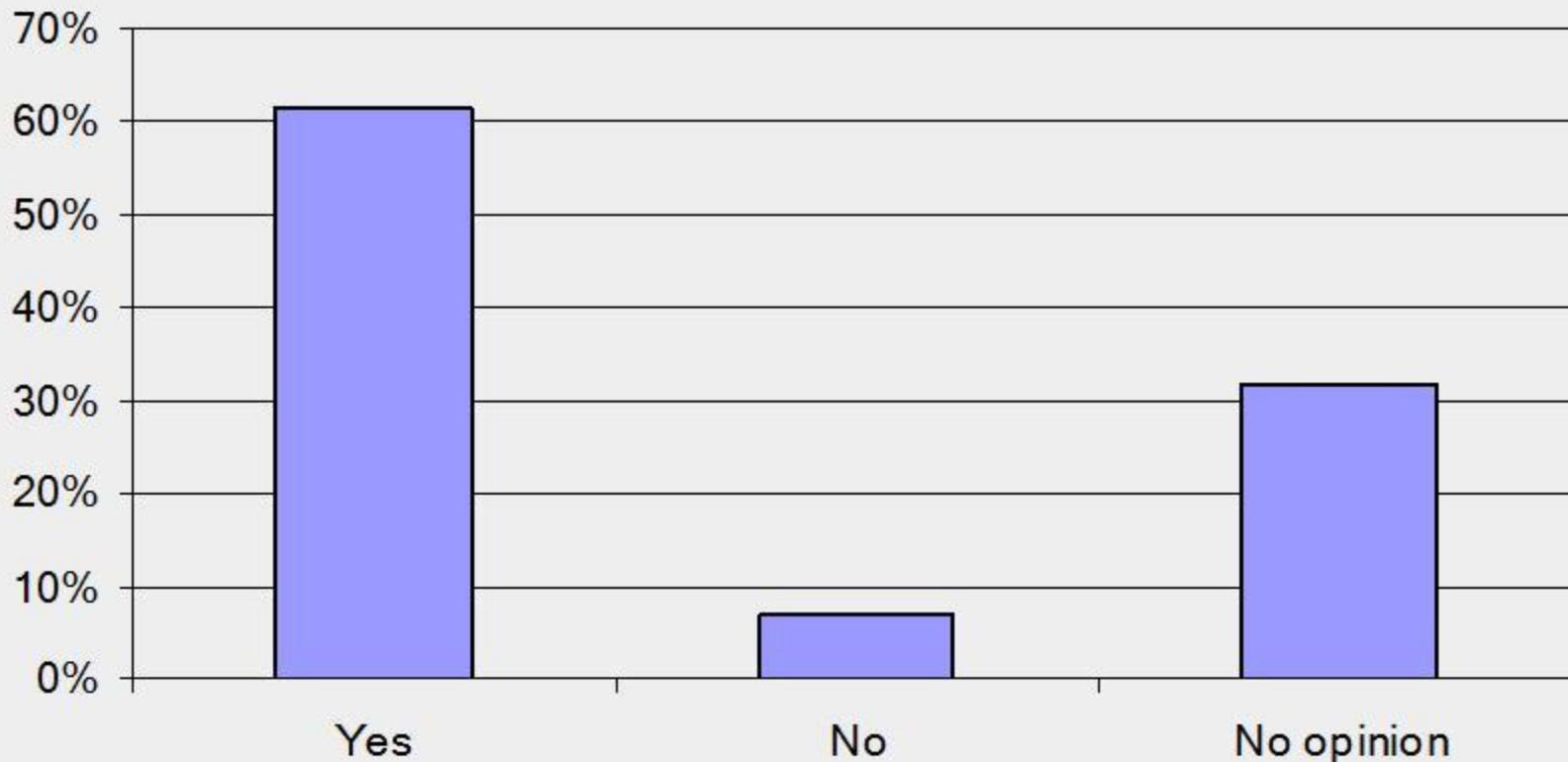
Answered Question 440

Skipped Question 9

Phase VI Predictions Track Phase I-III



Do you find geospatial work being performed or procured more frequently outside of the U.S. now than 10 years ago?



Our marketplace is growing however more work, skills, and jobs are moving offshore

All - Combined

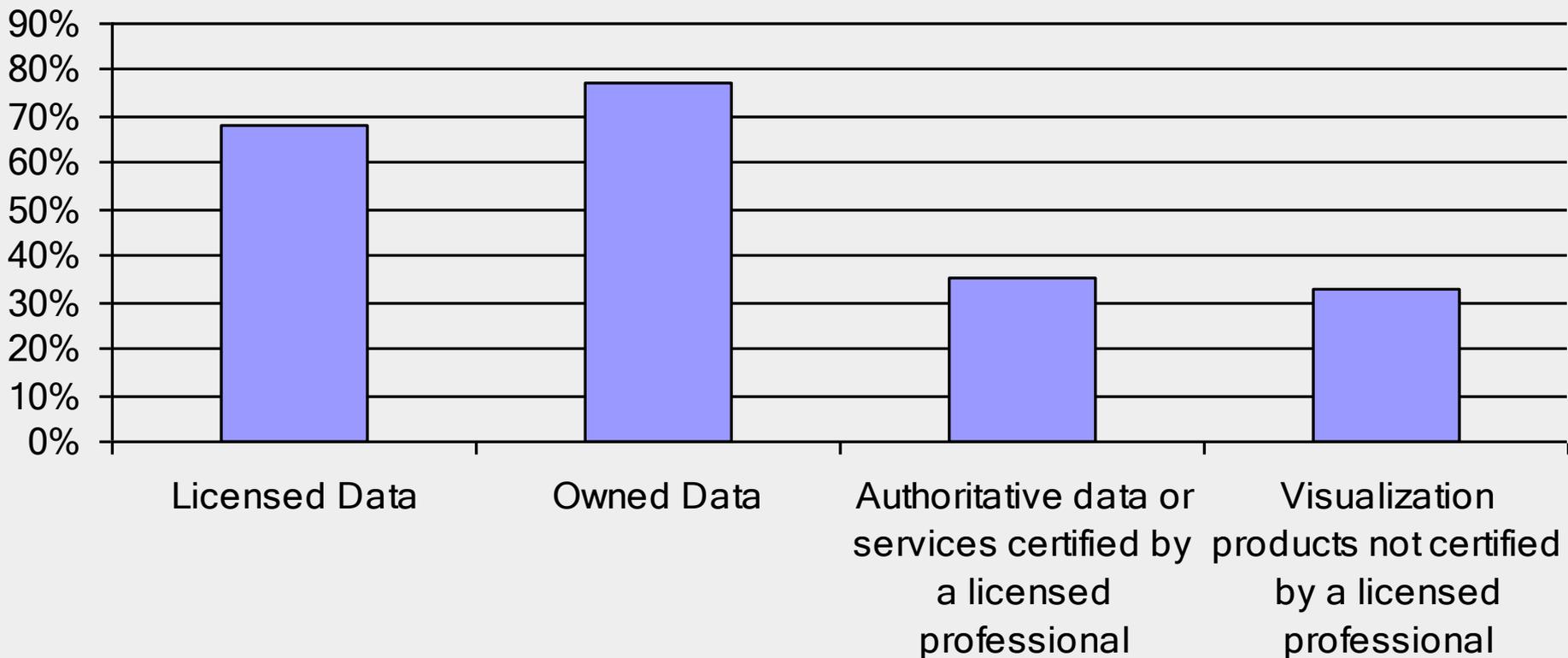
Answered Question 375

Skipped Question 75

Consumer applications are important to the future of the geospatial industry

- The impact of consumer use of WWW oriented data access
 - Firms are addressing changes in the market place caused by the development of consumer imagery and mapping:
 - 34% Does not affect their future activities
 - 40% Firms looking at Partnership with new entrants to market
 - 26% Consolidation with other existing firms needed to compete
- 66% of the respondent firms are adapting to the changing competition and market opportunities to take advantage of the new consumer-based market
- These monetization shifts are a driver of the change in perception of data

What types of data do you use in your work? (Please check all that apply.)



Perception of data: parity in methods of ownership and use shows a changing geospatial marketplace

Answered Question 330

Skipped Question 120

Summary

- Our profession shows to be made up of an aging workforce
 - This must be considered as we review current versus future hiring challenges
- Air versus Space data collection remain near parity while Other collection methods are on the increase
- Traditional data components in our profession still maintain the bulk of layers used with continued drive toward higher performance
- Our industry is continuing to trend upward in revenue growth however work performed overseas is also growing
- Consumer mapping and search have introduced new sales models to our industry which has affected the actions of two thirds of the geospatial firms surveyed
 - “Licensed versus owned” & “visualization versus authoritative” data appear at parity showing the affects of industry models



Mt Rushmore

Questions?



Miami-Biltmore Hotel

Questions?



USS Arizona Memorial

Questions?



Boldt Castle on Heart Island
Thousand Islands, NY

Questions?

An aerial photograph of a small, two-story house with a brown roof and dark siding, situated on a tiny, circular island in the middle of a vast, deep blue body of water. The water's surface is covered in small, white, shimmering reflections. The house is surrounded by a small patch of green grass and a few trees. The overall scene is serene and isolated.

Thank-you