Our mission: We go that bit further to provide our customers worldwide with the best advice on how to maximise the benefits of location information in their business. Our consultants come with location intelligence inside.
Objectives of the survey

• A view of the UK Location Market
  • To aid business planning
  • To guide investment strategies
  • To underscore the value and importance of the market within the wider UK and global economy
Defining the Market

• “Any endeavour where location information is used to the benefit of individuals, businesses and Government.”

• Inclusive of: professional GIS, EO, LBS, Hydrographic community, Consumer Apps
  • Geographical extent – GB and NI, excludes overseas activities.

• Supply-side Analysis
Method

• Public Sources
  – Investor calls, Annual reports
  – Published accounts (Companies House records)
  – Websites, published papers
  – Stock Exchange activity

• Private research
  – Direct insights from industry opinion formers
  – Market Sentiment Survey
  – Recruitment Market Analysis
External drivers

- Political / Economic
External drivers

• Social
  • Increasing reliance on location information in our daily lives
What does this mean for the Location Market?
UK Supply Size Market Size Trend

- 2012: £1230 m
- 2017: £1420 m
- 2019: £1850 m

2012-17 CAGR: 2.9%
2017-19 CAGR: 14.1%
Market by Product Segment

- Data services: 33%
- Consumer Mapping Applications: 23%
- Software product sales: 17%
- Professional services: 8%
- Managed services: 6%
- Hardware & equipment supply: 6%
- Systems integration: 6%

Total: £1.85 billion
Which segments grew most in the last two years?

Turnover per market segment (in GBP per year)

- Hardware & equipment supply
- Data services
- Managed services
- Software product sales
- Professional services
- Systems integration
- Consumer Mapping Applications
- Map Agents
- Unallocated

2017 vs 2019
Growth Trends
<table>
<thead>
<tr>
<th>Sector</th>
<th>% of Market</th>
<th>Growth Trajectory</th>
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</thead>
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<tr>
<td>Central Government</td>
<td>★★★</td>
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<tr>
<td>Local Government</td>
<td>★★★</td>
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<td>Utilities</td>
<td>★★★</td>
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<td>Defence and Intelligence</td>
<td>★★</td>
<td>⬇️</td>
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<td>Land and Property</td>
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<td>Retail</td>
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<td>Financial Services</td>
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<td>Emergency Services</td>
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</table>
Thank you

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For a free copy of the Executive Summary
Register at www.consultingwhere.com/lms19