

# Is GIS Yesterday's News?

Not according to our latest market study, which not only reflects high demand, but perhaps even a changing dynamic?

**T**he utilization of the Geographic Information System — simply GIS to most professionals today — took off more than 30 years ago when software developers integrated mapping into computer-aided design. Old news? On its own, perhaps. But, as we found out again this year, the market never stands still.

To identify trends in GIS use among surveyors, BNP Media's market research division again worked with the editorial staff of *POB* magazine to develop and conduct a detailed market study. As with in 2014, the overwhelming majority of respondents this time — 87 percent of users and 100 percent of non-users — are involved somehow in their companies' equipment purchases. You might be surprised at how they feel. They are, as we have come to expect, always looking for ways to work better.

Read on and, as always, you are encouraged to let us know what you think. For the full results of this and other studies, please go to [www.pobonline.com](http://www.pobonline.com).

## 'OPEN' FOR BUSINESS



Closed-source or proprietary GIS software — subscribed from such companies and suppliers as Microsoft, Esri, Intergraph and Oracle — remains the primary type used for both workflow and client services. However, is there a shift happening? Among the market study respondents who have GIS for workflow and for client services, both groups report an increased use of open-source GIS software in 2015.

Looking ahead, expectations for use among respondents also indicate a shift from closed- to open-source GIS. However, the percentage changes from 2014 to 2015 in expectations are not as profound as those above for current uses. This begs the question: Has the shift already happened in large part?

### GIS Types For Workflow



**2015**  
**66%** Closed-source GIS software  
**34%** Open-source GIS software

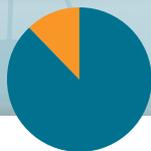


**2014**  
**80%** Closed-source GIS software  
**20%** Open-source GIS software

### GIS Types For Client Services



**2015**  
**74%** Closed-source GIS software  
**26%** Open-source GIS software



**2014**  
**88%** Closed-source GIS software  
**12%** Open-source GIS software

### GIS Types For Workflow



**2015**  
**75%** Closed-source GIS software  
**25%** Open-source GIS software



**2014**  
**79%** Closed-source GIS software  
**21%** Open-source GIS software

### GIS Types For Client Services



**2015**  
**71%** Closed-source GIS software  
**29%** Open-source GIS software



**2014**  
**79%** Closed-source GIS software  
**21%** Open-source GIS software

# IN DEMAND!

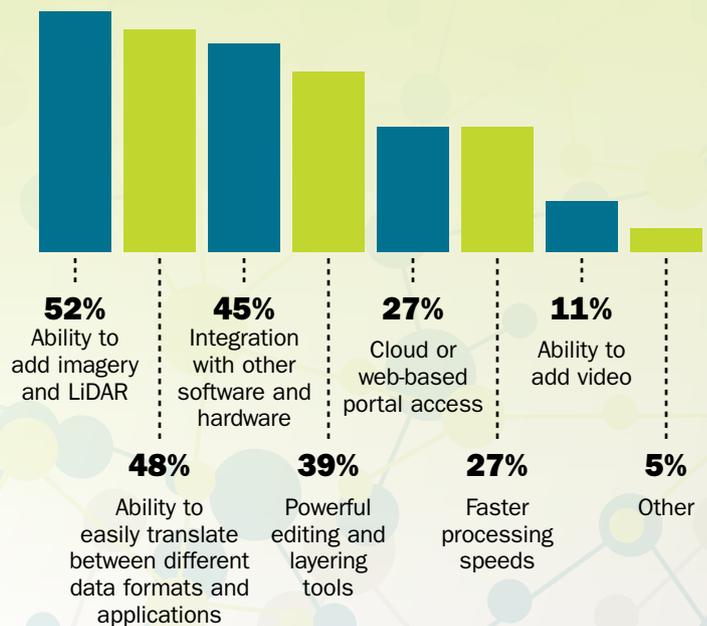


An already high demand for GIS services has sustained over the past 12 months. Among certain users, 31 percent see demand growing rapidly and 46 percent say demand is growing slightly, up from 25 and 48 percent respectively in 2014. That means that, on the whole, 77 percent in 2015 believe demand is growing, up slightly from an already high 73 percent. On the other side, only 3 percent believe demand is actually declining, even slightly, down from 4 percent in 2014.



And why is GIS remaining in high demand? Users cite multiple capabilities, led by the ability to add imagery and LiDAR, and the ability to easily translate between different data formats and applications. Again in 2015, the dominant driver for demand is an increased understanding of the value of GIS in the decision-making process, although down slightly in percentage from 2014.

## Most Important Capabilities



### Biggest Demand Driver

An increased understanding of the value of GIS in the decision-making process

**2015**    **2014**

**62%**    **62%**

Improvements in GIS hardware and software

**22%**    **14%**

A general trend toward the increased use of "big data"

**19%**    **23%**

## LET'S GET WITH IT



Among GIS users and non-users, there is an overwhelming common belief that the surveying profession still has the opportunity to lead in GIS, but isn't moving quickly enough. What is interesting is that while this sentiment among GIS users remained at a high 78 percent among users, it actually increased among non-users, from 63 to 78 percent.

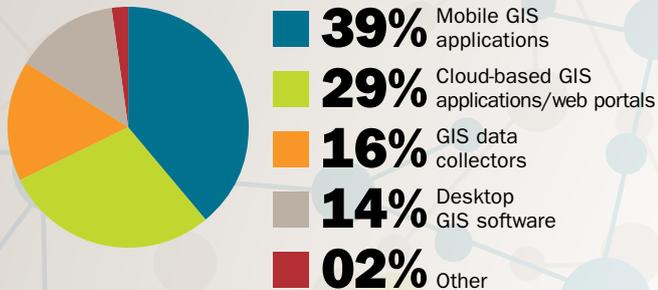
	Users	Non-Users
The profession has the opportunity to lead, but isn't moving quickly enough	<b>78%</b>	<b>78%</b>
The profession is leading the way in the application of GIS	<b>13%</b>	<b>14%</b>
GIS isn't necessarily for most surveying tasks, so GIS trends don't matter	<b>8%</b>	<b>3%</b>
The profession shouldn't be involved in GIS	<b>2%</b>	<b>5%</b>

## TOOLS OF THE TRADE

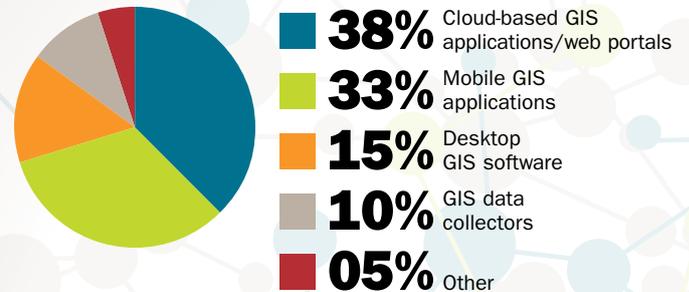


The largest percentage of respondents to our market study still believes mobile GIS applications have the most potential to improve workflow, followed by cloud-based applications. However, this year's gap has tightened to 10 percentage points over last year's 15. And, when considering what's most beneficial for improving service offerings, the dominant two responses actually flip positions.

### Potential for Improving Workflow



### Potential for Improving Service Offerings



Even among users of GIS technology, however, again less than half are planning to purchase new GIS tools over the next 12 months. Could it be they are being productive enough with the investments already made? Those who are planning to buy are looking primarily at GIS software and GIS data collectors.

	2015	2014
GIS software	27%	23%
GIS data collectors	23%	15%
GIS cloud/web services	16%	12%
Other	2%	3%
Do not plan to purchase	52%	60%

## HELP, PLEASE!

There is divided opinion among users and non-users of GIS about the training available to surveyors. Slightly more than half of respondents in each group believe that professional organizations are not adequately addressing the challenges created by GIS technology. Factor in those who neither agree nor disagree, and the affirmative is clearly in the minority.



### Statement:

**“Colleges/universities are adequately training the next generation of surveyors to correctly apply GIS technology.”**

### Agree

**Users: 33%**

**Non-Users: 27%**

### Statement:

**“Professional societies/organizations are adequately addressing the challenges being created by GIS technology.”**

### Agree

**Users: 36%**

**Non-Users: 24%**

### Statement:

**“There is adequate availability of GIS education courses and training opportunities for surveying professionals.”**

### Agree

**Users: 36%**

**Non-Users: 30%**