

Presentation Outline
Industry Update: Seeing Ahead in the Rear-view Mirror
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I. Introduction

- A. Economists' definition of an industry
- B. Today's topics
 - i. Trends and facts
 - ii. Possibilities and opportunities
- C. Review and closing remarks

II. Trends and Facts in the Rear-view Mirror

- A. Trends in technology influencing commercial remote sensing:
 - i. The growth of the Internet, which is independent of the geotechnologies, is also a force within our field, making access to data easier, creating online communities of users of different kinds of software, enabling Web-based GIS and so on.
 - ii. Mobile and wireless computing are growing.
 - iii. Broadband access is growing.
- B. Trends in the geotechnologies influencing commercial remote sensing:
 - i. GIS is being incorporated into the enterprise more and more.
 - ii. Data are routinely collected in digital form (whether from airplane or satellite) and analyzed digitally.
 - iii. Mapping tools on office desktops have analytic capability.
 - iv. Increasing numbers of vendors offer COTS terrain visualization software.
 - v. According to the US Department of Labor, geospatial technology is one of the top three growth industries.
 - vi. US federal spending on geotechnology products and services has grown 8% two consecutive years and exceeded \$6 billion dollars in FY2003.
- C. Trends specifically in commercial remote sensing:
 - i. Smaller satellites are finding their niche in Earth observation.
 - ii. Ever-higher-resolution satellite data is becoming available from multiple sources.
 - iii. More kinds of sensors are available and planned.
- D. Business/economic trends also relevant
 - i. Globalization
 - ii. Mergers and acquisitions
 - iii. Baby boomers are reaching retirement age.
- E. Fact of life: terrorism.

- F. John Naisbitt, author of **Megatrends**: "Trends, like horses, are easier to ride in the direction they are already going."

III. Possibilities and Opportunities on the Road Ahead

A. Possibilities and probabilities

- i. Constellations of satellites with all kinds of sensors - daily observations
- ii. Threat of terrorism drives requirements for interoperability, data sharing
- iii. Internet, mobile, wireless and broadband availability and use will continue to increase
- iv. Desire for security will result in increased allocation of resources to geotechnologies including imagery.
- v. Increasing market and retiring boomers combine to create a workforce shortage.

B. Opportunities

- i. Software providers and service providers will see growth in need for data integration, data fusion and information extraction
- ii. Application service providers can deliver any-time any-place access
- iii. Computer clothing for first responders - jacket as map?
- iv. Government markets will continue to be important, with state and local (first responders) gaining in relative importance.
- v. Companies that provide employee training will outperform those that don't.

IV. Review and Closing Remarks

- A. Wayne Gretsky's success: "I don't skate to where the puck is, I skate to where it's going to be."