The ASPRS Remote Sensing Industry Forecast

Phase II & III
Digital Sensor Compilation

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Background

- In August 1999, ASPRS and NASA's (then) Commercial Remote Sensing Program (CRSP) entered into a 5-year Space Act Agreement (SAA), combining resources and expertise to:
  
  - Baseline the Remote Sensing Industry (RSI) based on GEIA Model
  - Develop a 10-Year RSI market forecast and attendant processes
  - Provide improved information for decision makers
    - RSI Companies
      - Management
      - Business Development
    - Market Influences
      - Investors
      - Political Supporters
Remote Sensing Industry

Platforms & Sensors

Data Collection

Data Processing

Support Elements
• Hardware
• Software
• Etc.

Industry Intermediaries
• VARs
• Consultants
• Etc.

Business Segments

End-User
Organizational Focus on Market Segments

Survey Question C07

% of Respondents

Market Segments

- General Mapping
- Environmental
- Civil Government
- Transportation
- Utilities
- Forestry
- Agriculture
- National/Global Security/Defense
- Exploration/Resources
- Business Development
- Real Estate
- Telecommunications
- Insurance
- Entertainment/Media
2002 Baseline Forecast

• Assume best insight comes from CEOs/CFOs and use their Expected Revenues and build revised baseline 2002 accordingly

Approach:
1. Average 2001 and 2002 CEO/CFO Expected Revenue estimates. Use to plot 2001-2006
2. Apply AAGR associated with those estimates to forecast 2007-2112
Geospatial Activities as Primary Business

- Companies tend to operate in more than one business activity
- In Previous forecasts Aerial still outweighed space in data acquisition
  - An Update will be presented at ASPRS’s Reno conference May 1-5, 2006
There are major differences in what is being Used vs. what is Needed:

- Needs in the 3 feet and less group exceed what is in Use
- Use and Needs in the 1 to 4 meter group are about the same
- Use in the 10 meter and greater group exceed Needs
- An Update will be presented at ASPRS’s Reno conference May 1-5, 2006

More than 50% of the Needs across the sectors are for Spatial Resolutions less than a meter.

Spatial Resolution: Use vs. Needs (All Sectors)

Based on Phase II 2209 Survey Use Responses and 1646 Need responses
Geo-location Accuracy Use Vs. Needs: All Sectors

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Based on Phase II 1501 Survey Use responses and 1153 Need responses
About 60% of the Need is at Elevation Accuracies of less than 3 feet

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Based on Phase II 1050 Survey Use responses and 968 Need responses
Need for Image Types: 2001 vs. 2006 (All Sectors)

• Based on the data, major shifts will occur in Image Types used from 2001 to 2006.
  ➢ Biggest increase in LIDAR, SAR and Hyperspectral
  ➢ Biggest decrease in Digital Black & White, Color Film, Pan Film (Pan;B/W), Color IR Film
  ➢ Multispectral, Digital IR, and Digital Color remain nearly the same
  ➢ An Update will be presented at ASPRS’s Reno conference May 1-5, 2006

Based on Phase II 2796 (Year 2001) Survey Responses and 2948 (Year 2006) responses
Primary Platform Use CY 2000

Number Respondents

- Aerial: 149
- Space: 78
For More Information

• ASPRS will present an update of The Use versus Needs Slides at the ASPRS Reno Conference May 1-5, 2006

• All public documents and presentations are on the ASPRS website at: