

Digital Map - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

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Report description:

The Digital Map Market size is estimated at USD 25.55 billion in 2024, and is expected to reach USD 47.88 billion by 2029, growing at a CAGR of 13.39% during the forecast period (2024-2029).

Growth in the application of the advanced navigation system in the automotive industry, the surge in demand for Geographic Information Systems (GIS), and increased adoption of connected devices and the internet are some of the major factors driving the growth of the digital map market.

Key Highlights

- In recent years, digital map technology has found a potential place in various industries such as energy & power, automobile, logistics, transportation, government, construction, telecommunication, and others, offering advanced GIS, map analytics, and real-time tracking systems. Logistics and transportation sectors are one of the most crucial sectors deploying advanced digital map solutions to augment their operations through reduced up-time and finding effective delivery routes.
- Additionally, digital map technology offers end-to-end map solutions such as location information, real-time update, technology collaboration, and analytics for better geo-mapping outputs. As the internet and connected devices such as smartphones, tablets, and interactive displays are experiencing higher adoption for map-based applications among the global population, the market for digital maps is expected to grow at a healthy rate in the coming years.
- Moreover, from automotive vehicles to home appliances, the world is moving towards connected devices which provide real-time data tracking and location-based operation solution to consumers, driving the market's growth significantly. According to Forbes, the Internet of Things (IoT) connected devices installed base worldwide is expected to reach 75.44 billion devices by 2025, which in turn will bring a broad range of lucrative growth opportunities for the market throughout the forecast period.
- However, the rise in the overall complexity of the integration of traditional maps with modern GIS systems might be a factor that

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could restrain the market's growth.

Digital Map Market Trends

Surge in Demand for GIS and GNSS to Influence the Adoption of Digital Map Technology

- Geographic Information Systems (GIS) and Global navigation satellite systems (GNSS) are potent technologies in digital map solutions. As the GIS and GNSS vendors are developing mobile-based geospatial sensor platforms, digital map solutions are becoming more advanced with vector development and map simulation techniques.
- Expanding telecom networks and wireless connectivity is leveraging GIS-powered maps to gain user accessibility and real-time map execution. Data analytics is also one of the emerging areas to augment the application of GIS with spatiotemporal data and multidimensional connectivity. Moreover, GIS technology advances digital mapping capability with simulation forecasting, planning, landscape analysis, mobility management, and object tracking, which is anticipated to fuel the growth of digital map solutions in the forecast period.
- Various Global Navigation Satellite Systems (GNSS) deployed (such as GLONASS) or under development in recent times (such as BeiDou and Galileo) would reinforce the impact of satellite positioning in the daily lifestyles of people. Hence, there lies a massive growth in the applications and requirements for consumer-level positioning in cars, other vehicles, and smartphones. Moreover, the market is witnessing various product innovations and launches by key players as part of its strategy to improve business and their presence to reach customers and meet their requirements for multiple applications.
- For instance, in September this year, Aurora Insight declared the launch of a space-based radio frequency interference (RFI) monitoring service that could alert GNSS signal vulnerabilities or interferences worldwide. Aurora thus takes a unique approach to interference monitoring by delivering organizations with a global layer of data that informs GNSS customers of potentially harmful interference. The map-based tool can also help keep organizations informed about the ever-changing wireless environment while delivering a holistic view of the global state of interference.
- As per the European GNSS Agency, last year, the installed base of global navigation satellite system (GNSS) devices worldwide stood at around 6.5 billion units and is thus predicted to rise to about 10.6 billion devices by the end of 2031. Last year, the global navigation satellite system (GNSS) market was valued at approximately 150.5 billion USD. Hence, with the overall rise in the installed base of global navigation satellite system (GNSS) devices globally, the market is expected to witness exponential growth throughout the forecast period.

Asia-Pacific is the Fastest Growing Region for Digital Map Market

- Asia-Pacific is one of the fastest-growing regions in the Market. It is primarily due to the rise in the E-commerce sector, considerably requiring digital maps is expected to be one of the other major driving forces for this Market. Companies like Flipkart and Alibaba, major e-commerce players, have invested in Global Positioning System (GPS) tracking and geographic information system (GIS) solutions. Alibaba invested in the location platform PlaceIQ, which uses location as a utility to identify and model consumer behavior.
- Countries including India, China, Singapore, Japan, Australia, and South Korea have seen a significant shift in technological adoption in recent years. Increased utilization of digital map solutions for e-commerce applications, mobile data coverage, urban planning, supply chain & logistics management, and environmental monitoring in all these Asian countries will influence the adoption of digital maps in the coming years.
- Moreover, the gaming companies in the region are some of the primary adopters of advanced AR technologies globally. The introduction of sophisticated games being played in virtual environments is one of the major application areas for GIS-based

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systems. Though China dominates the gaming sector, Japan is the third largest Market according to game revenue and generates over USD 14 million a year.

- The growth of the automotive sector in the region is expected to be one of the primary drivers of the Market in the future. Leading the next wave of change in automated vehicles, players like Nissan, Toyota, and Honda have already developed technology similar to Level-2 ADAS systems. This is one of the major areas of application for HD Map solutions offered by players like TomTom BV, which now have a major presence in countries like South Korea and Japan.
- Furthermore, China Mobile, a telecom company, has announced to release of over 47 mobile ends supporting 5G networks, including AR/VR, developed by 34 partners, including Huawei, Samsung, Vivo, and Oppo. China Mobile has also mentioned that 10 million people are already using the 5G network, and the figure is expected to reach 600 million by 2025 in the country. This is expected to aid the region's adoption of GIS-based location solutions.

Digital Map Industry Overview

As some regional and global players dominate the market with their technological expertise in digital map solutions, the global market for digital maps is expected to be consolidated. Collins Bartholomew Ltd, Digital Map Products, Inc., Digital Mapping Solutions, DMTI Spatial, E.S.R.I. Business Information Solutions, Inc., Google L.L.C. (Alphabet Inc.), HERE Technologies, Lepton Software, Mapbox, MapData Services Pty Ltd, Maxar Technologies (DigitalGlobe), ThinkGeo L.L.C., and TomTom International B.V.B.V. are some of the major players present in the current market. However, all these players are involved in competitive strategic developments such as partnerships, new product innovation, and market expansion to gain leadership positions in the global digital map market.

- November 2022 - A.G.I. members U.N.L. Global and Genesys International declared a strategic partnership to create a hyperlocal Location Technology Platform powered by a high-accuracy 3D digital map of India. The alliance would bring advanced Geospatial and mapping solutions to the entire Indian market.
- July 2022 - Magic Leap, Inc., and NavVis, a global leader in reality capture and digital factory solutions, declared a strategic partnership to provide large-scale Augmented Reality (A.R.A.R.) applications in complex enterprise environments. Integrating Magic Leap's advanced spatial computing platform with NavVis's mobile mapping systems and spatial data platform, the two companies target to augment the overall usage of A.R.A.R. applications across various key industries, including automotive manufacturing, retail, and the public sector.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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