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The Forrester Wave™: Location Intelligence Platforms, Q2 2020

Tools And Technology: The Digital Intelligence Playbook

by James McCormick
June 23, 2020

Why Read This Report

In our 30-criterion evaluation of location intelligence platform providers, we identified the nine most significant ones — CARTO, Esri, Google, Hexagon, MapLarge, Microsoft, Oracle, Salesforce, and Syncsort — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer insights (CI) professionals select the right one for their needs.

Key Takeaways

Esri And Syncsort Lead The Pack
Forrester's research uncovered a market in which Esri and Syncsort are Leaders; Microsoft and Oracle are Strong Performers; and Salesforce, MapLarge, Hexagon, Google, and CARTO are Contenders.

Strategy, Platform Experience, And Support Are Key Differentiators
As the demand for location intelligence grows beyond traditional sectors and uses cases, three key areas differentiate the evaluated vendors: a strategic focus on supporting customer insight; platform experience supporting multi-enterprise functions; and direct and indirect support. Vendors that make it easy for their customers to generate richer insights and deliver better experiences — specifically in the area of digital customer engagement — position themselves well to capture a significant and growing market opportunity for location intelligence.

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by James McCormick
with Gene Leganza and Chandler Hennig
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Related Research Documents

Beyond The Map With Location Intelligence

The Forrester Tech Tide™: Digital Intelligence Technologies, Q1 2019

Now Tech: Location Intelligence Technologies, Q3 2019

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Tools And Technology: The Digital Intelligence Playbook

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Location Intelligence Changes The Game For Customer Insights

The golden age of location intelligence has arrived for CI professionals. The opportunity to collect customer location information is exploding.[1] And modern data, analytics, and business optimization practices are increasingly leveraging this location-based information to win, serve, and retain customers.[2] In support, the vendor community now offers a maturing set of location intelligence platforms, which provide a comprehensive set of location data management, spatial analytics, and location execution software, as well as data products. This combination of capabilities enables CI professionals to synchronize and optimize customer experiences, business decisions, and actions using location.[3] As a result of these trends, location intelligence platform customers should look for providers with:

› **A product strategy that focuses on customer insights, engagement, and experiences.**
Vendors in this space typically have product strategies that support the mature needs of geographic information system (GIS) and spatial analytics use cases. However, from the perspective of CI professionals, product vision and roadmaps differ significantly across evaluated vendors. The variances occur in the vendors' level of focus on helping users leverage location intelligence to enhance customer insights, facilitate customer engagement, and optimize digital experiences. Using location to enhance these capabilities is critical in helping firms digitally transform their business to compete in the age of the customer.[4]

› **Support for different user types enabled by an enterprise platform experience.** Modern enterprises need their location intelligence platform to support different functions that engage with customers, including marketing, operations, product, and commerce. Because the level of business, technical, and data competencies vary significantly across these functions, platforms must balance usability for business users with the data and technical sophistication needed by analysts, technologists, and data scientists. Enterprises also need all platform components to be packaged, tightly integrated, and easily implemented and managed across the organization.

› **Supporting services and a partner ecosystem to meet enterprise needs.** Most enterprises can't go it alone — and none should try. They need help managing location intelligence technology and applying it to different specialized use cases. To help them succeed, vendors must make available a range of both direct services and, via a partner ecosystem, indirect services. Examples of direct services include implementation, product, and technical support. A firm might require indirect services for enabling specialized vertical or operational use cases. Evaluated vendors showed significant variance in the strength of their supporting services and their partner ecosystem.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in the "Now Tech: Location Intelligence Technologies, Q3 2019" and "The Forrester Tech Tide™: Digital Intelligence Technologies, Q1 2019" Forrester reports.

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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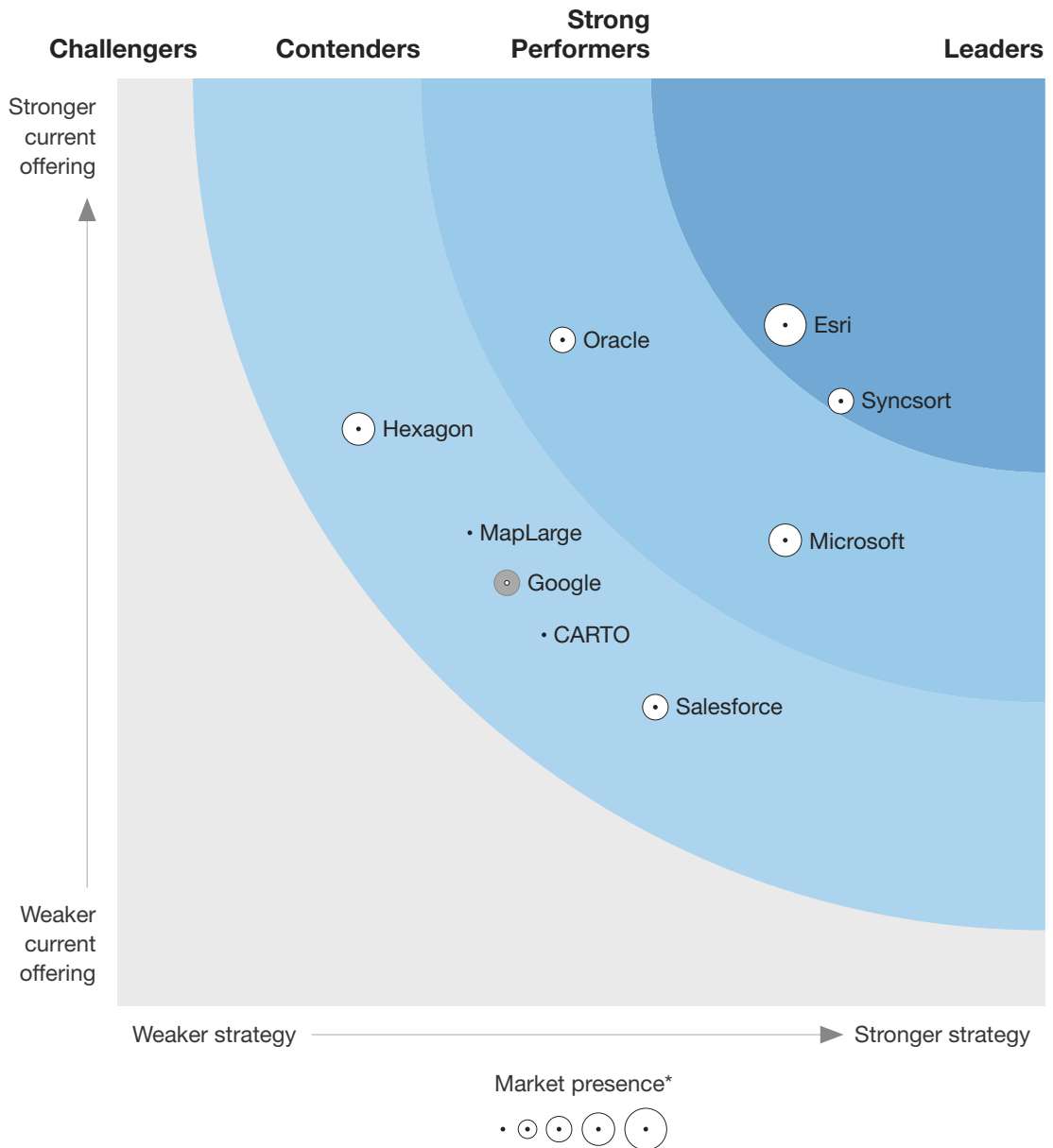**The Forrester Wave™: Location Intelligence Platforms, Q2 2020**
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FIGURE 1 Forrester Wave™: Location Intelligence Platforms, Q2 2020

THE FORRESTER WAVE™

Location Intelligence Platforms

Q2 2020

FIGURE 2 Forrester Wave™: Location Intelligence Platforms Scorecard, Q2 2020

	Forrester's weighting	CARTO	Esri	Google*	Hexagon	MapLarge	Microsoft	Oracle	Salesforce	Syncsort
Current offering	50%	2.00	3.67	2.28	3.11	2.55	2.51	3.59	1.61	3.26
Location intelligence data management	20%	1.00	4.00	1.20	2.80	2.30	3.80	3.80	1.50	3.20
Spatial visualization and analytics	30%	1.50	4.40	1.90	3.80	2.40	2.10	2.60	1.60	3.00
Data products	20%	3.00	3.60	3.00	3.00	1.60	1.00	3.80	1.00	5.00
Execution and optimization	15%	2.70	3.20	3.40	2.40	2.60	2.40	3.60	2.50	2.50
Platform experience	15%	2.30	2.30	2.40	3.00	4.40	3.70	5.00	1.70	2.30
Strategy	50%	2.30	3.60	2.10	1.30	1.90	3.60	2.40	2.90	3.90
Product vision	30%	1.00	3.00	3.00	1.00	3.00	5.00	3.00	3.00	5.00
Execution roadmap	30%	3.00	3.00	1.00	1.00	1.00	5.00	1.00	3.00	3.00
Performance	10%	5.00	3.00	3.00	1.00	1.00	3.00	3.00	5.00	3.00
Supporting services	15%	1.00	5.00	1.00	1.00	3.00	1.00	3.00	3.00	3.00
Partner ecosystem	15%	3.00	5.00	3.00	3.00	1.00	1.00	3.00	1.00	5.00
Market presence	0%	1.00	5.00	2.40	3.60	1.00	3.60	3.00	2.40	3.00
Platform revenue	35%	1.00	5.00	1.00	3.00	1.00	1.00	3.00	1.00	3.00
Enterprise customers	35%	1.00	5.00	5.00	3.00	1.00	5.00	3.00	5.00	3.00
Deal size	30%	1.00	5.00	1.00	5.00	1.00	5.00	3.00	1.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).
*Indicates a nonparticipating vendor.

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Vendor Offerings

Forrester included nine vendors in this assessment: CARTO, Esri, Google, Hexagon, MapLarge, Microsoft, Oracle, Salesforce, and Syncsort (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
CARTO	CARTOframes Data Observatory CARTO On-Premises	1.0 2.0 4.0.1
Esri	ArcGIS Platform	10.8
Google	Google Maps	Cloud-based solution
Hexagon	LuciadLightspeed LuciadRIA LuciadFusion M.App Enterprise ERDAS IMAGINE ERDAS APOLLO GeoMedia GeoMedia WebMap Mobile Alert HxGN Content Program	2020.0 2020.0 2020.0 16.6 16.6 16.6 16.6 16.6 16.5
MapLarge	MapLarge Mapping Engine	4.X
Microsoft	Azure Maps Microsoft Azure IoT Azure AI Microsoft Power BI Azure Synapse Analytics CosmosDB	
Oracle	Oracle Analytics Cloud (OAC) Oracle Analytics Server (OAS) Oracle Database	5.5 5.5 19c

FIGURE 3 Evaluated Vendors And Product Information (Cont.)

Vendor	Product evaluated	Product version evaluated
Salesforce	Salesforce Maps	Spring 2020
Syncsort	GeoAPIs GeoTAX MapInfo Pro and Advanced Master Location Data Perform360 Spatial Insight (GeoInsight) Spectrum Enterprise Geocoding Module Spectrum Enterprise Routing Spectrum for Big Data Spectrum Spatial Winsite Spectrum Technology Platform Syncsort data products	

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

› **Esri offers a complete platform to meet most enterprise needs.** ArcGIS is the centerpiece of Esri's location intelligence platform offering. It consists of numerous modules, including a full-featured mapping, analytics, and data management system; a hosted, online, cloud-based mapping, analysis, and data storage system; desktop GIS products; a suite of location-enabled applications; and APIs, software development kits (SDKs), and other developer tools. For years, Esri has been the dominant player in the market, enabled by its vision of location intelligence, which focuses on delivering business insights to customers by helping them visualize and analyze location in the context of enterprise data.

The key strength of Esri's platform is its complete set of location intelligence capabilities. It has depth and strength in multiple areas, including data management, data products, spatial visualization and analytics, and location intelligence execution. The vendor's success in the modern location intelligence market, however, is held back by a vision influenced by the traditional GIS market. Also, its multitude of different products and modules do not come together as well as some of its competitors' products. Reference customers love the Esri brand and its sense of social responsibility but express some frustration at the frequency of product licensing changes. ArcGIS is ideal for enterprises with a range of data, analytical, technical, and business users looking for an all-in-one location intelligence platform.

› **Syncsort's extensive capabilities target commercial firms but need tighter integration.**
Syncsort rebranded as Precisely on May 14, 2020.[5] Its location intelligence capabilities are from
its recent acquisition of Pitney Bowes' software and data business. These extensive capabilities
are spread over a plethora of products, including a desktop GIS, multiple geocoding products, a
geodata enrichment application, a bank branch performance management application, a location-
centric BI platform, and an enterprise routing and spatial analysis platform. Syncsort purchased
Pitney Bowes' software and data business to enhance its existing data enrichment portfolio of
products and services. The vendor's vision for the location intelligence platform is to operationalize
geospatial technology and data to support the most demanding enterprise applications while
maintaining service levels.

The vendor's record for innovation in areas such as data products and geodata enrichment are a
key strength. Syncsort also provides good capabilities across most major categories assessed.
However, much of the functionality is spread across product lines that lack the level of integration
seen with other evaluated vendors. Reference customers like the performance and value of the
address cleaning and geocoding functions. Some would like Syncsort to speed up its rollout
of pbKey, now rebranded as PreciselyID, which is core to the vendor's geocoding and geodata
enrichment strategy. The vendor's platform is ideal for commercial enterprises servicing a range of
location intelligence use cases for business, operational, and technical functions.

Strong Performers

› **Microsoft has a modern vision, with capabilities dispersed across different products.** Azure
Maps is just one of the many products within Microsoft's internet of things (IoT) portfolio, which
itself is part of the broader Microsoft Azure cloud computing services. The Maps REST APIs and
SDKs provide geospatial capabilities for developers, including map rendering, search, routing,
traffic, mobility, time zones, geolocation, geofencing, data storage, weather data, and spatial
operations. To supplement these core location intelligence capabilities, enterprises will require
other Microsoft Azure products, such as those for data warehousing, business intelligence (BI), and
managed databased services.

Microsoft's product vision is a key strength. It aims to scale the impact of location intelligence
with AI and IoT tech to drive decisions, actions, and experiences in a digitally transformed world.
The platform also provides good location data management and location intelligence execution
capabilities. The distribution of many of the enterprise capabilities across different products,
however, will disappoint buyers looking for a tightly packaged offering. Reference customers like
the vendor's postsales support and are keen for Microsoft to keep developing APIs that can help
them not only analyze and visualize location data but also drive decisions and actions at scale. The
solution is ideal for enterprises deep into their digital transformation journey, which have a mature
location intelligence strategy and good coordination between technical and business teams.

› **Oracle's enterprise capabilities impress but need a more focused strategy.** The core of Oracle's location intelligence capabilities lies within three products: Oracle Analytics Cloud, which has self-service data preparation, analytics, AI, visualization and reporting capabilities; Oracle Analytics Server, an on-premises equivalent to the cloud offering; and Oracle Database, the vendor's mainstay enterprise data management solution. Oracle's approach natively embeds location — data, spatial analysis, and location functionality — directly within its enterprise data and analytics platform offerings and business applications in a seamless, integrated manner. This means making location intelligence capabilities available within an on-premises environment and through cloud subscription services.

Oracle is strong in multiple location intelligence capability areas, including enterprise data management, location data products, and the executing and optimizing decisions and actions with location information. Its weaknesses lie in the vendor's strategy, where there is no clear, focused investment into the location intelligence platform space beyond continuing to evolve and invest in existing products. References customers love the enterprise data management approach to location intelligence. However, they feel that there is a big learning curve for users and would like Oracle to continue to improve the UI and open up the capabilities to a broader audience. The vendor's platform is ideal for large enterprises with an existing investment in Oracle's other technologies and good technical resources.

Contenders

› **Salesforce Maps delivers value quickly but is locked into the Salesforce ecosystem.** Salesforce Maps provides a number of location intelligence capabilities targeted primarily at Salesforce Sales Cloud and Salesforce Services Cloud users. These capabilities include location-based data visualization; scheduling and routing; lead generation; territory management; and asset, vehicle, and equipment tracking. The vendor's vision for the platform is to have it integrate geographic information with customer relationship management (CRM) data and maximize the productivity of its customers' sales and service resources.

Salesforce Maps delivers a lot of out-of-the-box value for existing Salesforce users because of its tight integration with the Salesforce Customer 360 Platform. The product is also one of the few location intelligence platforms purpose-built to use location intelligence to win, grow, and retain customers. With Salesforce's recent acquisition of the technology, the product roadmap is fated to be tied to the strategy of the vendor's dominant CRM and services business. This is good for firms that are heavily invested in Salesforce, but it limits the opportunity for ambitious users to apply location intelligence beyond this environment. Reference customers like how responsive the Salesforce Maps teams are to their needs and requirements. But some feel that the tech needs updating to improve the mapping and analytics capabilities. Firms heavily invested in Salesforce's sales and services products, and wanting to optimize planning and decision making with location information, should consider this product.

› **MapLarge's high-performance tech appeals, but it needs a better partner ecosystem.**
MapLarge's platform provides developers with the necessary components for building location
intelligence solutions. Those components include map rendering, spatial visualization and analysis,
routing, network analysis, geocoding, and drive-time analysis. The vendor also has data products,
including those for census, lifestyle, behavior, traffic, business, and demographics. MapLarge's
vision for the platform is to provide high-performing, scalable location intelligence functionality
for enterprises across a variety of industries — while at the same time allowing for a number of
deployment options, including those for cloud, on-premises, mobile, and IoT edge configuration.
The platform supports key use cases, such as those for sales and marketing, operations and
supply chain, and risk and financial management.

The platform's scalability and multiple deployment options will appeal to enterprise solution
developers, and the velocity of map rendering and spatial analytics will enhance the user
experience for the solutions built. MapLarge partially addresses the relative weaknesses of its
partner program by its willingness to engage directly to provide strategic support — something
Forrester heard from reference customers. Enterprises with a mature location intelligence strategy,
large spatial data sets, and ample developer and technical resources should consider this vendor.

› **Hexagon has strong capabilities, but its strategy needs work.** Hexagon offers location
intelligence capabilities via a multitude of product lines acquired and evolved over the years,
including the Luciad portfolio, which delivers geospatial solutions; the ERDAS product portfolio,
which provides remote sensing and associated capabilities; GeoMedia, which has GIS capabilities;
and M.App Enterprise and Mobile Alert for building geospatial apps. Hexagon's aim for its location
intelligence products is to help customers automate the creation, analysis, and visualization
of spatial context in real time and to make it easier for their firms to gain insight with spatial
information. Use cases for these product lines primarily focus on defense, transportation, road
safety, and environmental management.

Hexagon's product set exhibits strength across most location intelligence functional categories
we assessed. Relative to the other evaluated vendors, however, its strategy is below par with
regards to product vision, execution roadmap, company performance, and supporting services.
Additionally, the location intelligence functionality is spread across a number of product lines
and is not packaged well for the buyer. Reference customers like Hexagon's track record in
technology investment but would like the vendor to be more innovative in developing and applying
their products. References would also like Hexagon's team to form stronger relationships with its
customers and develop a deeper understanding of the problems they are trying to solve. Forrester
recommends that firms with a mature location intelligence strategy and ample technical resources
consider this vendor.

› **Google's developer-friendly functionality is offset by its enterprise support.** The Google Maps
Platform (GMP) is a part of the Google Cloud Platform, which includes cloud products for data
storage and management, analytics, development, and operations. GMP consists of three key
components to support application developers: Maps provides customizable maps and street view

imagery; Routes provides routing functionality with real-time traffic; and Places provides point-of-interest data. Google's vision for the platform is to enable developers to build applications for users to explore the real world and provide immersive location experiences.

GMP has significant strengths for developers: The street view and traffic information are impressive; coverage for base maps, routing, and points of interest is global; and developers find it easy to build applications on top of the platform. Weakness include the high relative cost of using the platform and poor postsales support. Customers have told Forrester that they love the basic-but-clean location intelligence functionality and the ability to easily embed it into applications in ways that improve user experience. However, once customers start to mature and scale these applications, they find that Google is unable to provide the right levels of functional sophistication and strategic support. Developer-rich firms wanting to quickly embed location intelligence mapping, routing, and geocoding capabilities into their business and consumer applications should consider this platform. Google declined to participate in the full Forrester Wave evaluation process.

› **CARTO is good for data scientists but needs more out-of-the-box business value.** CARTO's platform consists of developer and data science libraries and APIs for building and embedding spatial analytics and visualization into applications and workflows; the CARTO Data Observatory, a data mart providing access to a catalog of curated data sets; and CARTO On-Premises, allowing users to implement the platform on their own private infrastructure. CARTO's vision is to move spatial analytics beyond the traditional GIS power users and put it in the hands of the growing number of data scientists and data decision makers.

The vendor's strengths are its spatial data science capabilities; APIs and libraries for executing location intelligence; and strong growth within the location intelligence space. Its key weaknesses are its limited data management capabilities, narrow range of spatial data types, and relatively few out-of-the-box business tools. Reference customers were impressed with the relationship they've forged with the CARTO team. They praised the team's ability to listen to requirements, provide flexibility when needed, and ultimately act as a strategic partner. The solution is ideal for enterprises with data science and development teams seeking to insert spatial analytics into their decision processes and business applications.

Evaluation Overview

We evaluated vendors against 30 criteria, which we grouped into three high-level categories:

› **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include location intelligence data management, spatial visualization and analytics, data products, execution and optimization, and platform experience.

› **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated each vendor's product vision, execution roadmap, performance, supporting services, and partner ecosystem.

› **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's platform revenue, enterprise customers, and average deal size.

Vendor Inclusion Criteria

Forrester included nine vendors in the assessment: CARTO, Esri, Google, Hexagon, MapLarge, Microsoft, Oracle, Salesforce, and Syncsort. Each of these vendors:

› **Markets a platform that delivers advanced location intelligence capabilities.** Each vendor's platform provides advanced capabilities in the following areas: location intelligence data management; spatial visualization and analytics; and capabilities to guide business decisions, actions, and experiences with location-based insights.

› **Has applications, APIs, and SDKs that activate on location intelligence.** The vendor's platform includes APIs, SDKs, and mobile SDKs to deliver location intelligence functionality.

› **Places a significant focus on its location intelligence software and data business.** The vendor's revenue from its location intelligence business is $15 million or more, with at least 60% of this revenue generated from software and data sales. The vendor also has at least 100 enterprise customers.

› **Has market visibility in the location intelligence space.** Forrester clients often discuss the vendor's location intelligence platform through inquiries; alternatively, the vendor may, in Forrester's judgment, warrant inclusion or exclusion in this evaluation because of specific approaches the vendor has taken relative to location intelligence market trends.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology Guide to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by March 26, 2020, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with The Forrester Wave™ Vendor Review Policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the Integrity Policy posted on our website.

Endnotes

[1] See the Forrester report "Beyond The Map With Location Intelligence."

[2] See the Forrester report "The Forrester Tech Tide™: Digital Intelligence Technologies, Q1 2019."

[3] See the Forrester report "Now Tech: Location Intelligence Technologies, Q3 2019."

[4] Location intelligence enhances digital customer understanding, engagement, and experience across the entire customer lifecycle — when customers discover new brands; explore offerings; purchase products; use the products; get support for products; and during ongoing engagement with peers and the brand. It is critical to providing additional context in the online and physical worlds across all of these customer touchpoints. See the Forrester report "Beyond The Map With Location Intelligence."

[5] Source: "Syncsort Rebrands as Precisely, Powers Confident Business Decisions with Trusted Data," Precisely press release, May 14, 2020 (https://www.precisely.com/press_release/precisely-launch).

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