



GeoSearch, Inc.
2011 Wage & Salary Survey

Executive Summary

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Executive Summary

ABOUT THE SURVEY:

The "2011 Survey" marks the 20th annual wage and salary survey GeoSearch, Inc. has compiled. The survey originated in an attempt to measure job categories that couldn't be found in other surveys and it remains a unique source of geospatial compensation data. Data contained in the 2011 Survey arrives from information collected from the 133 geospatial employers that participated in this year's survey. Participants included commercial companies and public agencies. GeoSearch President Richard Serby states, "Since we measure data provided by organizations, rather than individuals, we believe the data is a more accurate snapshot of what actually exists in the marketplace."

GEOSEARCH RESEARCH STAFF:

President Richard D Serby

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State of the Geospatial Economy

In the third quarter of 2008, when the collapse of large financial institutions disrupted the economy of the entire globe, many in the geospatial community wondered how severe the impact would be on a sector where one third of the total revenue comes from the public sector and another third is strongly tied to construction activity. However, it didn't take long for the full impact of the crisis to be felt. By November of that year, most geospatial hiring activity halted. 2009 represented historically low GeoSearch job board activity and this was consistent with low volume postings for geospatial titles internet wide. Real estate sales, state budgets, and large commercial projects that fuel the geospatial sector declined.

In the second quarter of 2010 geospatial job postings and hiring activity started to stabilize. Opportunities for entry and mid-level surveyors, cartographers, photogrammetrists, and technicians housed in engineering, surveying, mapping, and other traditional services firms managed to produce marginal growth and hiring related postings increased. 2011 built on that momentum with new opportunities for mapping technicians and professionals involved in the application development and use of GIS. Further, demand for digital mapmaking is on the rise due to the mobile market and social network demand for fast, accurate, and complete location based information and this will likely be the main source of continuing job growth.

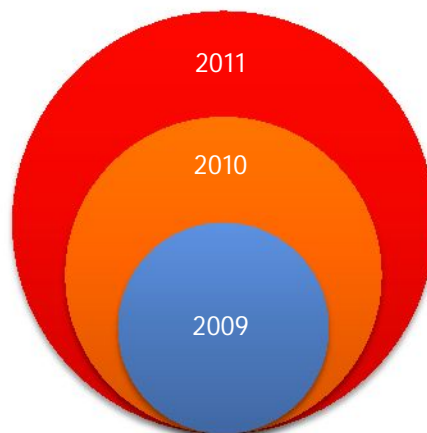
Complementing hiring trends, Wage & Salary data has realized similar ebbs and flows. Analysis of the category and classification of "GIS Manager", since that category has been used in all 20 GeoSearch Wage & Salary Surveys, a dramatic 9.5% drop in salary occurred in the 2008 data compared to the 2009 data. An upward trend is beginning to emerge but wages in this category haven't returned to the 2007 high when the reported average was \$81,581.

The state of the geospatial economy appears to be strengthening by both the increase in opportunities and annual salary reporting's. In addition to openings from location based technology demand, job openings will continue to increase from the need to replace workers who transfer to other occupations or who leave the labor force altogether.

Geospatial Job Postings

Posted Jobs Trend is up

Our analysis of unique job postings data comes from internal GeoSearch job board statistics and Wanted Technologies, a job aggregator that crawls job board websites and de-duplicates the same job found on multiple websites to display one unique job posting in the portal. This covers approximately 90% of the online job market and reviews approximately 48 million job postings.



GIS MANAGER WAGE DATA

- 2011 AVERAGE \$75,799
Year over year increase of 2.6%
- 2010 AVERAGE \$73,888
Year over year increase of 3.1%
- 2009 AVERAGE \$71,597
Year over year decrease of 9.5%
- 2008 AVERAGE \$79,198
Year over year decrease of 2.9%

Analysis of Modest Wage & Salary Gains

As a group, the overall average salary reported for the geospatial workforce is up 3.25%. The illustration graph on the right breaks down the individual percentage for year over year gains when looking at four key classifications in the last two surveys: GIS Manager, GIS Project Manager, Stereoplotter Operator, and Sales.

Geospatial Sales Representatives recorded the weakest growth in starting salary among the general group; their average base salary grew just 0.9 percent to \$73,185. However, that reported base salary has not fluctuated much in recent surveys. It is only a 3.2% increase from the 2008 survey when the average was \$70,894. By contrast, the biggest reported increase came from the data for Stereoplotter Operators. They jumped from \$48,521 in 2010 to \$51,423 in 2011. Possible explanations for this:

Many photogrammetrists have returned to school and now have a bachelor's degree to compliment their strong technical skills while the pool of prospects has been shrinking as many Operators are approaching retirement age. Could be that fewer organizations are sending work overseas and that demand for US production is gaining ground.



The balance of power shifted significantly in 2008 from employees to employers. The modest increases observed in the reported data for 2009, 2010, and now 2011, tend to suggest that the momentum is beginning to swing in the job seekers direction. Data from candidate expectations seem to confirm that the employer grip on the market may have loosened from the firm hold on the market in 2009. Although, it is safe to say that it is still an employer market.

The compensable factors that are not evaluated in the GeoSearch survey such as bonus, incentives, commissions, or other benefits have undoubtedly transformed. Adjustments to health care and employer responsibilities, along with payroll cost and tax considerations have influenced the dynamics of total compensation. Changes in compensation structure frequently adjust and have a major impact on an organizations ability to attract and retain top talent. This is particularly true for the sales staff. Companies have sought to pass on more of the business risk to their employees, for example by withdrawing base salary for higher percentage commission on earned sales. This, in some cases, has allowed a company to hire more sales staff.

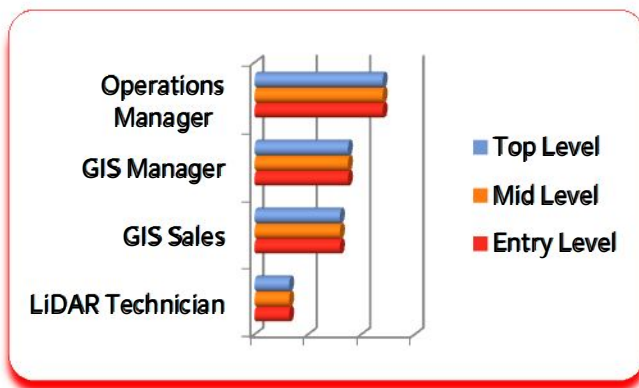
Four locations that have seen the highest job posting activities are Colorado, Texas, D.C., and California. The cost of living adjustments and the housing market has had a great impact on the candidate pool for perspective employers as it relates to mortgage considerations. In many cases, the ability to pick up and relocate is prohibited for candidates that are not able to sell their house in a reasonable time frame.

The pace of recruitment is expected to pick up further from the last quarter of 2011, as confidence returns, but is unlikely to reach boom levels of the earlier part of the decade. If the growth trends sustain, organizations will resume large-scale recruitment to keep up with the business expansion that has been on hold in recent years. Election years are historically flat as major decisions are postponed until uncertainty erodes.

Total 2011 Average's

The average's for the 2011 Survey show on a positive news regarding an upward trend in wages.

The overall average salary for the geospatial professional is up to \$72,364, which is substantially higher than the average national wage. Also, the average reported salaries in the geospatial market place have increased across the board.



2011	Average Wage
Operations Manager	\$130,505
GIS App Developer	\$85,853
Product Manager	\$80,908
GIS Manager	\$75,799
GIS Project Manager	\$73,288
GIS Sales Representative	\$73,185
GIS Specialist	\$56,196
GIS Analyst	\$54,576
GIS Technician	\$47,125
LiDAR Technician	\$46,211

Participating organizations: 133

Percentage of participants by number of employees:

Less than 100:	43.6%
100 to 199:	13.5%
200 to 999:	19.4%
1000+:	17.2%
No Response:	5.2%

About GeoSearch, Inc.



GeoSearch, Inc is a personnel recruitment firm specializing in the geospatial sciences and technologies. GeoSearch began operations in October, 1989. October 12th 1995 www.geosearch.com was registered on-line making it the first geospatial job board. Contact info: PO Box 60789 Colorado Springs, CO * Phone: 866-962-7772 * Fax 888-371-1243 * www.geosearch.com

For 20 years, GeoSearch, Inc. has surveyed geospatial employers for wage and salary information in various categories and classifications. The full data is available for purchase at www.geosearch.com.

Although this data is believed to be reliable and accurate, GeoSearch cannot claim statistical validity. While the GeoSearch Wage and Salary Survey is a valuable tool, it is strongly suggested that this information be used in conjunction with other known data sources and that local and community cost-of-living, competition from other industries and related matters be factored in to the interpretation of any wage and salary data, including this survey.

GeoSearch, Inc. Offers personnel recruitment services in Geospatial Sciences, Geographic Information Systems (GIS) Recruitment, Global Positioning Systems (GPS), Photogrammetry, and many other related sciences. We recruit technical, management, sales and marketing professionals.