People Monitoring and Safety Solutions

People Monitoring and Safety Solutions is a comprehensive report from Berg Insight analysing the latest developments on the people tracking markets in Europe and North America.

This report in the LBS Research Series from Berg Insight provides you with 120 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

This report will allow you to:

- **Profit** from 30 new executive interviews with market leading companies.

- **Identify** key players on the European and North American people tracking solution market.

- **Learn** about the latest propositions from family locator service providers.

- **Understand** the opportunities and challenges for mobile telecare alarm devices.

- **Anticipate** future drivers for uptake of mobile workforce management services.

- **Predict** future trends in lone worker protection services.

- **Realize** the commercial potential of emerging segments including offender monitoring.

Order now!

Please visit our web site to order this report and find more information about our other titles at **www.berginsight.com**

Berg Insight's LBS Research Series

What are the real business opportunities for LBS on the global market? Berg Insight's LBS Research Series is a unique series of market reports published on a quarterly basis. Each title offers detailed analysis of the most interesting LBS topics such as handset-based satellite positioning technology, mobile personal navigation services and location-enabled content services. Once per year we also publish a summary of our research with detailed forecasts for the major regions.

www.berginsight.com

BERG INSIGHT

What are the latest trends on the market for people tracking solutions?

People tracking solutions that enable a third party to locate a person were introduced in the late 1990s. Today, most people tracking solutions rely on GNSS and mobile communication technologies to determine the location of a person and transmit the data to a third party. Technological advancements have enabled substantial improvements in GPS receiver performance and cost. Small, dedicated battery powered GPS tracking devices suitable for the mass market has become a reality. There are also a growing number of people location apps that leverage the growing installed base of GPS-enabled smartphones.

People tracking solutions aimed at the consumer market range from family locator services that provide peace of mind for parents of children and teenagers, to solutions that assist caregivers of seniors and people suffering from various medical conditions. Family locator services have been part of mobile operators' LBS portfolios for many years, but are now facing competition from app developers. The willingness to pay for operator services is declining as consumers' awareness of free people location apps for smartphones has increased significantly in the past 12–18 months. Berg Insight estimates that there were about 20 million users of family locator apps in Europe and North America in August 2012.

The demand for dedicated location devices targeting the child and teenager segment is generally low as many parents adopt handset-based solutions. Numerous device vendors are therefore looking to address the needs of people caring for persons of all ages suffering from various medical conditions, such as autism and other cognitive limitations, epilepsy, cardiac problems and diabetes. These compa-nies are also addressing the market for systems that assist seniors living at home or in care homes. The assistance systems are commonly called telecare systems or social alarms in Europe and Personal Emergency Response Systems (PERS) in the US. Berg Insight estimates that there are already up to 5 million users of the first generation social alarms connected to PSTN networks in Europe and North America. The addressable market for the next generation mobile social alarms is therefore large.

Companies from various industries such as fleet management, asset tracking and application development now provide people location serv-ices that address the needs of business customers. Mobile workforce management services aim to improve operational efficiency and focus on managing individual employees. Industry sectors leading the ▶
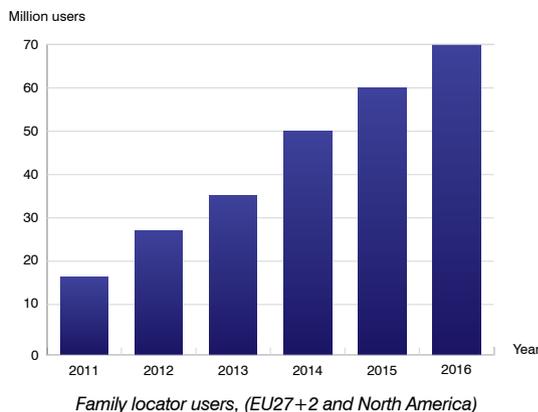
▶ adoption of workforce management solutions include construction, distribution and companies with extensive field services. Mobile work-force management is frequently part of fleet management solutions for light commercial vehicle fleets. Applications can in addition be delivered via smartphones. Two-way communication saves time by enabling field staff to be directed to go from one place to another without returning to the central location for receiving new work orders. Cost savings can also be achieved through more efficient time verification and data collection in the field. Lone worker protection services primarily focus on ensuring the security of employees through features such as two-way communi-cation and automatic location. Many lone worker protection services rely on dedicated location devices featuring alarm buttons and man down detection sensors. These devices are typically programmed to send alarms to supervisors or alarm receiving centres in case of emergency. Berg Insight forecasts that the number of active users of workforce management and dedicated lone worker protection services in Europe and North America will grow from 1.1 million in 2011 to 2.8 million in 2016.

Electronic monitoring (EM) of offenders is gradually being adopted globally. EM is used to provide alternative ways of sentencing offend-ers and reduce the escalating costs for the corrective systems. EM is employed at various stages of the criminal justice system, including at pre-trial, at sentencing and following a period of incarceration. The aim of EM programmes is to increase offender accountability, reduce recidivism rates and enhance public safety by providing an additional tool to traditional methods of community supervision. However, there is still debate over the effectiveness of EM and how to best implement the technologies in various programmes to achieve the goals. The most common forms of EM equipment in use today are RF systems that comprise a transmitter worn by the person being monitored, often in the form of an ankle bracelet. The RF transmitter sends out a signal to a receiver unit that communicates with a monitoring centre to report signal interruptions during curfews or any attempts to tamper with the equipment. Systems using GPS location that allow near real time location of the offender as well as creation of geographic inclusion and exclusion zones are also being used.

This report answers the following questions:

- Which market segments adopt dedicated tracking devices?
- What is the potential market size for mobile telecare alarms for seniors?
- Which operators have introduced branded family locator services?
- Who are the leading providers of mobile resource management services?
- What is the potential market size for lone worker protection services?
- Are regular handsets suitable for lone worker protection services?
- Who are the leading providers of electronic offender monitoring solutions?

Million users

Family locator users, (EU27+2 and North America)

Table of Contents

About the Author

André Malm is a senior analyst with a Masters degree from Chalmers University of Technology. He joined Berg Insight in 2006 and his areas of expertise include location-based services, personal navigation services and wireless M2M markets.

Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. From time to time we also perform custom research assignments. Our vision is to be the most valuable source of intelligence for our customers.

Who should buy this report?

People Monitoring and Safety Solutions is the foremost source of information about the status, future market trends and technology developments on this market. Whether you are a vendor, telecom operator, investor, consultant or application developer, you will gain valuable insights from our in-depth research.

Related products

- Fleet Management in Europe
- Container Tracking and Security
- The Global Wireless M2M Market
- Security Applications and Wireless M2M

s-o.se

© Berg Insight AB - No. 90

Order form — TO RECEIVE YOUR COPY OF <u>PEOPLE MONITORING AND SAFETY SOLUTIONS</u>

You can place your order in the following alternative ways:

1. Place your order online in our web shop at www.berginsight.com
2. Fax this order sheet to us at fax number: +46 31 711 30 96
3. Mail this order sheet to us at: Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden
4. Email your order to: info@berginsight.com
5. Phone us at +46 31 711 30 91

Choose type of format

- ☐ Paper copy ....1000 EUR
- ☐ PDF 1-5 user license ....1500 EUR
- ☐ PDF corporate license.......3000 EUR

Family/Surname	Forename	Position	Company

Address	Country	Postcode

Telephone	FAX	Email

VAT is chargeable on all orders from Sweden. Orders from all other countries in the European Union must include the buyer's VAT Registration number below in order to avoid the addition of VAT.

Your PO number	Your VAT/TVA/IVA/BTW/MWST number

Please charge my credit card

☐ VISA ☐ Mastercard

Card number

Expiry date (MM/YY)   /

CV code

Cardholder's name

Signature

Billing address

Postcode   Country

Reports will be dispatched once full payment has been received. For any enquiries regarding this, please contact us. Payment may be made by credit card, cheque made payable to Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden or by direct bank transfer to Skandinaviska Enskilda Banken, 106 40 Stockholm, Sweden.

Account Holder: Berg Insight AB
Account number: 5011 10 402 80
BIC/SWIFT: ESSESESS
IBAN: SE92 5000 0000 0501 1104 0280

☐ We enclose our cheque payable to Berg Insight AB
☐ Please invoice me

Signature   Date

BERG INSIGHT