

# People Monitoring and Safety Solutions

**People Monitoring and Safety Solutions** is the fourth consecutive report from Berg Insight analysing the latest developments on the people and pet tracking markets in Europe and North America.

This report in the LBS Research Series from Berg Insight provides you with 140 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:***

- **Benefit** 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 on the mobile telecare alarm device market.
- **Anticipate** future drivers for uptake of mobile workforce management services.
- **Predict** future trends in lone worker protection services.
- **Profit** from updated regional market forecasts lasting until 2021.

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## Which are the fastest growing segments for consumer oriented and professional locator devices?

People monitoring solutions that enable third parties to locate a person were introduced in the late 1990s. Today, most people monitoring 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 dedicated battery powered GPS locator devices suitable for the mass market to become a reality. There are also a vast number of people locator apps that leverage the growing installed base of GPS-enabled smartphones.

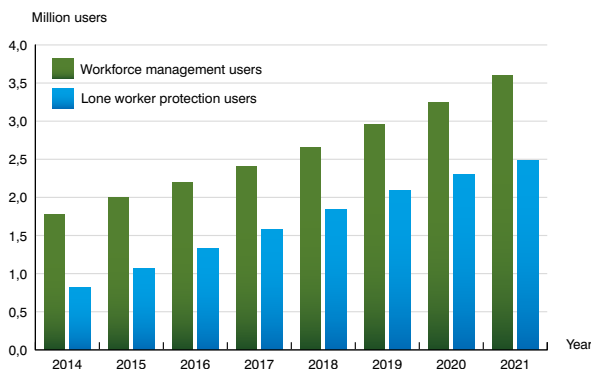
Consumer-oriented people locator solutions range from family locator services that provide peace of mind for parents of children and teenagers, to solutions that assist caregivers of seniors and people suffering from various medical conditions. Family locator services that have been part of mobile operators' LBS portfolios for many years – especially in the US – are now facing competition from free apps. The willingness to pay for operator services is declining as consumers' awareness of free people locator apps has increased significantly in the past few years. Operators are therefore looking for additional revenues from related services, such as device management apps that monitor voice, data and app usage on children's handsets. Besides family locator services, there are many location sharing services that have similar functionality but focus on slightly different needs and use cases by enabling the user to control exactly when the location is shared, with whom and for how long.

Many companies have launched GPS-based locator devices for parents that want to locate their children and teenagers. The market has been slow to take off, initially due to low awareness, poor performance and high cost. Today, more than a dozen companies have launched locator devices that are aimed at several consumer oriented applications such as asset, pet and child tracking. Examples include hereO, PocketFinder, Philip Technologies, WTS and Yepzon. Several of the latest devices focus on ease of use and are designed to appeal to children. Berg Insight forecasts that pet monitoring is a segment with large potential. There are more than twice as many pets in Europe and North America as there are children aged 0–18 years. Most pet owners are very passionate about their animals and consider them as part of the family. There are a handful of companies that develop GPS-based locators aimed specifically at creating peace of mind for owners of dogs and cats. Many of these locator devices in addition measure the pet's activity to enable health

► monitoring. Examples of vendors active in Europe and North America include Attracting, CareWhere, Kippy, Pawtrack, Tractive and Whistle Labs. Several others, like DogTelligent, G-Paws and WÜF intend to enter the market during 2016. The product category still suffers from lack of awareness among potential customers. The number of active users in Europe and North America reached about 300,000 at the end of 2015.

Several locator device vendors have started 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 and cardiac problems. Many of these companies are also serving 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 North America. Berg Insight estimates that there are more than 7 million users of the first generation telecare systems in Europe and North America. The addressable market for the next generation mobile telecare systems is therefore large. The number of mobile telecare systems in use in Europe and North America had reached less than 0.5 million at the end of 2015.

People locator solutions addressing the needs of business customers are available from companies in industries such as fleet and asset tracking, as well as IT and LBS specialists. Mobile workforce management services aim to improve operational efficiency and focus on managing individual employees. Cost savings can be achieved through better routing of employees as well as more efficient time verification and data collection in the field. Many companies now adopt more or less standardised workforce management apps for smartphones. Industry sectors leading the adoption of workforce management solutions include construction, distribution and field services. Lone worker protection services primarily focus on ensuring the security of employees. Many lone worker protection services rely on dedicated GPS location devices featuring alarm buttons and man down detection sensors. Berg Insight forecasts that the number of users of workforce management and lone worker protection services in Europe and North America was 3.0 million at the end of 2015.



Handset-based mobile workforce management and lone worker protection service users (Europe and North America)

### This report answers the following questions:

- Which market segments adopt dedicated locator devices?
- What is the potential market size for mobile telecare alarms?
- How has free apps affected the family locator market?
- What is the current status on the pet locator market in Europe and North America?
- Who are the leading providers of mobile workforce management services?
- What is the potential market size for lone worker safety services?
- Are smartphones suitable for lone worker protection services?

## Executive summary

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## 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, M2M/IoT platforms and several M2M/IoT verticals including smart cities and car telematics.

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