

# People Monitoring and Safety Solutions

**People Monitoring and Safety Solutions** is the fifth 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 190 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.



## **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 LBS platforms, location-based advertising, 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.

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## What are the latest developments on the people tracking market?

Modern people monitoring solutions rely on GPS and wireless 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. Dedicated people locator devices are available in a wide range of form factors including boxes, pendants, bracelets, watches and handsets designed for different use cases. The growing installed base of GPS-enabled smartphones have opened up the market for location based mobile apps, which are used in a number of people monitoring segments to various extents.

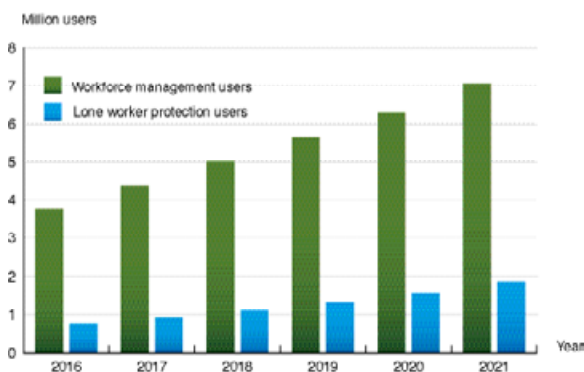
Consumer-oriented people locator solutions range from family locator services that provide peace of mind for parents of children and teenagers, to solutions that assist caregivers of seniors and people suffering from various medical conditions. The market for handset-based family locator services is dominated by freemium apps. Location sharing functionality is also offered by numerous widely-used apps such as Google's Google Maps, Facebook's Facebook Messenger and Apple's Find My Friends. A growing number of companies market GPS-enabled devices for children that are too young to use mobile phones. The market is still in its infancy, but has grown notably in recent time. Vendors including Filip Technologies, hereO, LG Electronics and Tinitell have designed locator devices in the form of wristbands and wristwatches. More than a dozen companies including Weenect, WTS and Yepzon have furthermore launched locator devices that are aimed at several consumer oriented applications such as asset, child and pet tracking.

Over a hundred million households in Europe and North America own at least one dog. The installed base of active pet locator devices reached close to 400,000 in 2016. The addressable market is large as a new generation of pet owners emerge on the market that are more likely to try new technology and use social media to connect with brands and other pet owners. In Europe, Tractive has grown rapidly to become the clear market leader. Whistle Labs, which was acquired by Mars Petcare in Q1-2016, is the largest player on the North American market. Both companies have launched new versions of their pet locator devices recently, which in addition to location tracking measure the pet's activity to enable health monitoring. ►

► Telecare service providers are showing increasing interest in new mobile telecare solutions that are better suited for certain user groups. Incumbents such as Philips Lifeline, Tunstall and Doro have in recent time launched new products in this category. Many start-ups are further entering the market with new innovative solutions, mainly in the form of wearables. Over time, mobile telecare devices are likely to replace conventional telecare systems among seniors as the devices become more attractive and better suited to their increasingly mobile lifestyles. The number of active mobile telecare systems in Europe and North America grew to over 500,000 in 2016.

People locator solutions addressing the needs of businesses are available from companies in industries such as fleet and asset tracking, as well as IT and specialist vendors. Mobile workforce management applications enable workers to report time, collect data in the field, access back-office information and communicate with managers. Berg Insight estimates that the market for mobile workforce management software in Europe and North America amounted to € 1.35 billion (US\$ 1.49 billion) in 2016. Moreover, a growing number of countries are adopting regulations that specifically address the safety of lone workers. Lone worker protection services primarily focus on ensuring the security of employees. The market for lone worker devices and services in Europe and North America reached € 120 million (US\$ 130 million) in 2016.

Electronic monitoring (EM) of offenders is still relatively rare in the context of European and North American corrections systems. EM is used to provide alternative ways of sentencing offenders 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 use of GPS technology in EM programmes has grown rapidly in North America in recent years and is starting to gain ground in Europe. The average daily caseload of monitored individuals in Europe and North America amounted to approximately 180,000 in 2016.



Mobile workforce management software and lone worker protection services users (Europe and North America)

### This report answers the following questions:

- What is the potential for LPWA connectivity in the consumer tracking segment?
- What is the potential market size for offender monitoring products and services?
- 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?
- Which countries are adopting regulations for lone worker safety?
- Are Bluetooth wearables suitable for lone worker protection services?
- What is the potential market size for mobile telecare alarms?

## Executive summary

### 1 Overview of people location solutions

#### 1.1 Device segment

- 1.1.1 Mobile phones and smartphones
- 1.1.2 Dedicated people locator devices

#### 1.2 Positioning segment

- 1.2.1 Mobile network-based location technologies
- 1.2.2 GNSS: GPS, GLONASS, Galileo and Compass/BeiDou 2
- 1.2.3 Wi-Fi positioning
- 1.2.4 Bluetooth Low Energy and Bluetooth 5

#### 1.3 Network segment

- 1.3.1 Public cellular networks
- 1.3.2 The cellular M2M connectivity market in Europe and North America

#### 1.4 Platform segment

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- 2.3.2 CareWhere
- 2.3.3 Comtech Telecommunications
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- 2.3.5 Filip Technologies
- 2.3.6 Haltian
- 2.3.7 hereO
- 2.3.8 Kippy
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- 2.3.10 Location Labs (Avast Software)
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- 2.3.12 SPOT (Globalstar)
- 2.3.13 Suchmich
- 2.3.14 Tinitell
- 2.3.15 Tractive
- 2.3.16 Weenect
- 2.3.17 Whistle Labs
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- 3.3.10 MobileHelp
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- 4.4.15 Sygic
- 4.4.16 Telogis (Verizon)
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## Glossary

## About the Author



**Fredrik Stålbrand** is an IoT/M2M Analyst with a Master's degree in Industrial Engineering and Management from Chalmers University of Technology. He joined Berg Insight in 2016 and his areas of expertise include people tracking and ITS in public transport markets.

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