

Electronic Offender Monitoring Solutions - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

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Report description:

The Electronic Offender Monitoring Solutions Market size is estimated at USD 1.34 billion in 2024, and is expected to reach USD 2.30 billion by 2029, growing at a CAGR of 9.5% during the forecast period (2024-2029).

Furthermore, the government initiatives on electronic monitoring EM programs include significant economies worldwide, which may further drive market growth in the forecast period. HMPPS, on behalf of the Home Office, has recently begun using GPS monitoring for people who have been freed from prison or immigration custody as a result of bail. The program was extended to Scotland and Northern Ireland from August 2022 until the end of 2022.

Key Highlights

- Electronic monitoring solutions accurately and quickly locate offenders, which could be used in criminal investigations and prosecutions. Such benefits of electronic offender monitoring solutions are expected to promote the market demand for electronic monitoring solutions. Further, in May 2022, US Immigration and Customs Enforcement (ICE) announced that USD 7.2 million was spent on facial recognition and location tracking of migrants. US ICE is paying surveillance software company Trust Stamp USD 7.2 million annually to develop tech for tracking migrants processed at the southern border.
- As per the Ministry of Justice of the United Kingdom, court bail orders remain the significant cohort of individuals energetically monitored by an electronic monitoring instrument, accounting for 40 percent (5,979) of the caseload as of September 30, 2022. In response to the impact of the COVID-19 pandemic on the judiciary, electronic monitoring of those on bail increased sharply in early 2020. Although the number has fallen slightly in 2021, it is now at a record level.
- The number of people who were active in the monitoring increased between September 30, 2021, and September 30, 2022. Extensions drove this increase to the use of location (GPS) monitoring tags for new offender cohorts, particularly for immigration bail, and the continued roll-out of alcohol monitoring tags. Such an increase in the demand for electronic monitoring solutions is

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expected to boost the Market's growth.

-Furthermore, in September 2022, the total number of individuals actively monitored with an electronic monitoring device or alcohol monitoring device was 14,996, an increase of 12 percent compared with September 30, 2021. Although the monthly figures fluctuate, the trend over the 12 months has been upward. Such a demand trend in electronic monitoring solutions is expected to increase the demand for electronic monitoring devices in the Market during the forecast period.

-Moreover, as per the survey conducted by the Ministry of Justice, Crime Prevention Policy Bureau, on offenders on Electronic Monitoring to observe their behavior and environment and check living conditions and violation of obligations to remove factors of re-offending for their successful rehabilitation, 72 percent of the offenders has a fear of being arrested for a repeated crime, and 91.7 percentage of the offenders had self-control from doing illegal activities.

-Furthermore, the Russia-Ukraine war is impacting the supply chain of electronic components. Being a significant supplier of raw materials for producing electronic components. The dispute has disrupted the supply chain, causing shortages and price increases for these materials, impacting analytical instrument manufacturers and potentially leading to higher costs for end-users.

-The disadvantages of such facilities are their start costs, the possibility of escaping or committing crimes, community objections, and the potential loss of in-home equipment. Electronic monitoring is an additional component for some programs, and the equipment used may have technical problems that might hamper the market growth.

-Furthermore, the demand for electronic offender monitoring solutions increased during the COVID-19 pandemic due to overcrowding and the COVID-19 scare in prisons. Due to the increased inconvenience and inability to directly monitor the prisoners owing to various COVID-19 protocols, the demand for electronic offender monitoring solutions increased significantly during the forecast period.

Electronic Offender Monitoring Solutions Market Trends

Global Positioning System Driving the Market Growth

- Global positioning systems (GPS) are increasingly used to monitor an offender's location and notify the probation and parole officers if the offender enters an exclusion zone. According to the House of Commons, as of 2022, there were approximately 89,520 prisoners in custody in the UK, with the vast majority of these being prisoners in the jurisdiction of England and Wales at 80,660 prisoners, with a further 7,430 in Scotland, and 1,640 in Northern Ireland.

- In addition, satellites track the location of the offender's GPS device, which is often secured on the ankle of the offender. The GPS Program allows approved and eligible non-violent inmates to be placed in a supervised reintegration program.

- Governments of various countries have been introducing multiple policies in the Market to target high-risk offenders in the region. Further, the Government of Saskatchewan, a Canadian Province, recently introduced two new policing initiatives to reduce reoffending by high-profile offenders.

- Furthermore, the Warrant Enforcement and Suppression Team (WEST) would focus on warrant enforcement in the entire province. Adopting an Electronic Monitoring Global Positioning System (EM GPS) would reduce reoffending and help offenders reintegrate into the community.

- The province invested approximately USD 3,70,000 in WEST during 2021-2022 and USD 1.6 million each subsequent fiscal year. The EM GPS initiative received approximately USD 673,000 in 2021-2022 and had an ongoing annual cost of about USD 1.3 million each subsequent year. Such initiatives by the companies in the Market are expected to support the adoption of electronic monitoring GPS systems during the forecast period.

- Further, the government of the UK announced the first-ever UK pilot program to tag perpetrators of domestic abuse with GPS tracking devices upon release from prison to protect victims of abuse better and address the behavior of offenders. Offenders who have suited a prison sentence for domestic abuse-related offenses, such as stalking, harassment, physical abuse, sexual abuse, and coercive control, will be tagged with a GPS tracking instrument as part of their release conditions.

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Europe Expected to Hold a Significant Market Share

- Europe is expected to hold a significant share of the global electronic offender monitoring solutions market. Electronic monitoring is booming in Europe. While most probation services in Western European countries are experimenting with it, probation services in many Eastern European countries are considering pilots.
- Furthermore, electronic monitoring or tagging is widely used across the United Kingdom to monitor curfews and court or prison order conditions. After being first deployed in the United States, Electronic Monitoring was brought into the United Kingdom and implemented under the Criminal Justice Act 1991.
- As per the Government of the United Kingdom, as of September 30, 2022, the total number of individuals monitored was 14,996, an increase of 12 percent from 13,371 in the previous year. Furthermore, in September 2022, the number of individuals actively monitored with a location monitoring device or GPS rose by a staggering 143 percent from the previous year, 2,161 to 5,243. The sharp increase resulted from the continued roll-out of electronic monitoring to unique offender cohorts, particularly immigration bail.
- Alcohol monitoring recently went live throughout England and Wales to support the new community sentencing option, the Alcohol Abstinence and Monitoring Requirement (AAMR). An AAMR is only used when sentencing for alcohol-related criminal behavior and imposes an overall ban on drinking alcohol for up to 4 months. Compliance with the banning is monitored electronically using an alcohol tag that continuously monitors the presence of alcohol in the subject's sweat.
- According to the Government of the United Kingdom, as of September 30, 2022, the total number of individuals actively monitored with an electronic or alcohol monitoring device was 14,996, representing an increase of 12 percent compared to the same period in the previous year.
- The UK government recognizes that electronic monitoring is a valuable tool with flexible and wide-ranging potential and is committed to unlocking the potential of new and existing technologies in the EM space to serve and strengthen the country's criminal justice system. The government recently announced additional funding of GBP 183 million (USD 224 million) over the next three years to kickstart the EM Expansion Program and aims to increase the EM caseload from around 13,500 in the previous year to 25,000 by 2025.
- In addition, in January 2022, the minister of Justice signed a three-year contract with electronic monitoring provider Buddi Ltd. The starting date of the agreement was February 1, 2022, and consisted of the lease of 20 ankle bracelets. Further, in the United Kingdom, facial recognition smartwatches are soon expected to monitor migrants convicted of a crime. Under new plans from the Home Office and the Ministry of Justice in August 2022, foreign offenders would have to scan their faces up to five times a day using instruments equipped with the technology.

Electronic Offender Monitoring Solutions Industry Overview

The electronic offender monitoring market is highly fragmented. Due to the COVID-19 impact, the demand for the electronic offender monitoring market expanded, With several players operating in the segment. Various companies are currently focusing on providing cost-competitive products to the customers, which caters to an intense rivalry in the market.

In April 2022, Allied Universal joined the Attenti Group with G4S Monitoring Technologies to form Allied Universal Electronic Monitoring Services. Allied Universal Electronic Monitoring Services has become the worldwide market leader in electronic monitoring systems, with operations in more than 35 countries and pro forma revenues of over 150 million USD in 2021.

In January 2022, SCRAM Systems announced a collaboration agreement with Upstream, a Belgian-based provider of rehabilitative electronic monitoring wristbands. SCRAM Systems will distribute Upstream's one-of-a-kind GPS-locking smartwatch in the United States.

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Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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