

Public Safety - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Public Safety Market size is estimated at USD 36.09 billion in 2024, and is expected to reach USD 116.47 billion by 2029, growing at a CAGR of 26.41% during the forecast period (2024-2029).

Key Highlights

- Increasing awareness about the importance of security, replacement of ancient architecture, and rise in hazardous industrial explorations, among other factors, is expected to drive the demand for the public safety market.
- Public safety, which refers to protecting the public and critical infrastructure, is usually handled by specialized agencies across various departments, such as EMS, police, and other civil organizations. Owing to the increasing security threats, it has become imperative for public safety agencies to collaborate and share information regarding possible threats to work toward a preventive mechanism to ensure optimal safety.
- Public safety and security are essential for economic development and community well-being. The growing number of global catastrophic accidents, Crime rates, and Terrorist Activities have increased the concern over the safety of people, assets, and processes, which is a driving factor. Governments are increasingly trying to develop intelligent mitigation plans to minimize the response time and damage caused by natural and artificial disasters, which is expected to drive the market. It also prompted governments all over the world to consider a revision of their regulatory policies.
- Rising adoption of advanced technologies such as the Internet of Things (iot), Artificial Intelligence (AI), Machine learning (ML), and network technology devices enable communities to protect critical infrastructure, improve public safety and security and positively affect the residents' lives. Also, the aspects such as increasing globalization & urbanization, lack of skilled security employees, growing environmental apprehensions & needs, and the growth in smart cities are predicted to influence the market's growth over the coming years.
- However, high installations and maintenance costs, lack of advanced infrastructure in underdeveloped countries or regions, and

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lack of interoperability of systems for public safety and security systems could restrain the public safety market. Governments spend considerable resources on installing critical communication networks, biometric security, surveillance systems, scanning, and screening systems, and emergency and disaster management systems which incur high installation and maintenance costs; however, these facilities could be more economical.

- Given the critical roles of first responders and public servants, being on the frontlines of responding to an unprecedented public health emergency, such as the COVID-19 outbreak, attracted considerable attention toward public safety. However, the market witnessed a downfall due to the implementation of lockdowns and shutdowns of travel across the world to stop spreading the virus. Post-pandemic has created a new era of public safety innovations. Motorola Solutions recently engaged Goldsmiths, the University of London, for a first-of-its-kind global research study to better understand how public safety agencies adapted to overcome upcoming trends and challenges, indicating the need for the demand for public safety solutions soon.

Public Safety Market Trends

Law Enforcement Segment to grow at a higher pace

- In law and enforcement, the lives of others depend on the ability to respond quickly to a critical situation and coordinate actions using timely and accurate information. Even after an incident has passed, sharing information with the courts and other agencies is vital for fast and effective investigations and resolution, further demanding public safety solutions.

- Adopting new internal security and border defense techniques is the need of the hour, keeping in mind the crime scene today. Aspects of Industrial Revolution 4.0, such as cloud computing, artificial intelligence, iot, drones and counter-drones, and AR/VR, are changing lives. Law enforcement agencies must keep up with industrial advancements and simultaneously understand changing crime patterns. Today, cybercrimes are being deployed to rip off ordinary people of their hard-earned money and spread fake news and communal disharmony, which drives the need for Public safety solutions.

- Using data and the latest technology, transparency can be increased to break down informational barriers between law enforcement and citizens. Also, these two can collaborate to identify needs and establish best practices to maintain public safety. In August this year, Accurint Public Safety Marketplace offered law enforcement a way to seamlessly identify trusted providers of cutting-edge solutions to fit the needs of their agency. The Accurint Virtual Crime Center is the foundation of the marketplace and is required to be able to purchase other modules available through the Public Safety Marketplace.

- Thus, law enforcement software helps generate actionable insights, which can help reduce crime and enhance public safety. The software integrates analysis, lead generation, and communication technologies to provide a complete view of the data for law enforcement and partner agencies.

United States is Expected to Hold a Significant Market Share

- The stringent governmental regulations for industrial safety are one of the factors driving the demand for public safety in the United States. The Patriot Act of 2001 identified several locations and areas that require security. The National Infrastructure Protection Plan (NIPP) has been revised to identify 16 critical sectors susceptible to attacks. Implementing this plan has increased the demand for public safety solutions in those 16 sectors, such as agriculture and food, emergency services, defense, IT, energy and power, transportation and shipping, banking, chemical and hazardous manufacturing industry, and national monuments.

- The United States represented about 4.4% of the total world's population in prison in 2021, according to data from the US Bureau of Justice Statistics. This has posed new challenges for law enforcement. Due to lacking police officials, the country depends on digital public safety measures to manage law and order-related activities. Also, there has been a significant increase in the number of mass shootings in the United States.

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- Los Angeles Airport Police, which employs more than 1,100 law enforcement and civilian personnel with a mission of ensuring safe and secure operations, relies heavily on technology to gather and store data that informs incident response. The department leveraged an upgraded in-house CAD system with integrated records management to unify critical information from different sources, including 911, the LMR system, video cameras, and data resources to streamline the capture, correlation, and distribution of information. All these advancements drive the need for public safety.
- A study conducted and released by Zebra Technologies Corp advocated that public safety agencies need to speed up the adoption of technologies to overcome some of the most significant operational challenges that surfaced during COVID-19 to safeguard public safety professionals such as the firefighters, police officers and the emergency medical technicians (EMT) as they remained on the front lines and took extreme personal risks to serve the communities.

Public Safety Industry Overview

In the public safety market, the competitive rivalry among the existing players lies between moderate and high. Considering the inflow of new entrants into the market, it is expected to increase. Acquisitions, partnerships with industry participants, and new product/service rollouts have been key competitive strategies exhibited by vendors in the market. As a software service, companies continuously update their solutions and offer them within their service period. New product developments also provide an edge over the others. Some key developments in the market include:

In June 2023, An accelerator program for government tech companies was launched by Amazon Web Services to help them grow and attract new investors. The accelerator's inaugural cohort, unveiled at AWS's annual Public Sector Summit in Washington, will comprise businesses focusing on criminal justice and public safety. The new accelerator will be modeled after earlier initiatives AWS has carried out for businesses with founders who identify as female or from a minority group.

Additional Benefits:

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

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