

# Global Mobile Video Surveillance Moves into the Fast Lane: Opportunities for Recording and Transmission Solutions

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Video Surveillance  
Market**

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# Market Segmentation

## Product Type\*

Cameras

Recording

Transmission

## Vertical Markets

Aircraft

Police Cars

Taxis / Cabs

Transit Buses

School Buses

Trains and Trams

## Geographic Scope

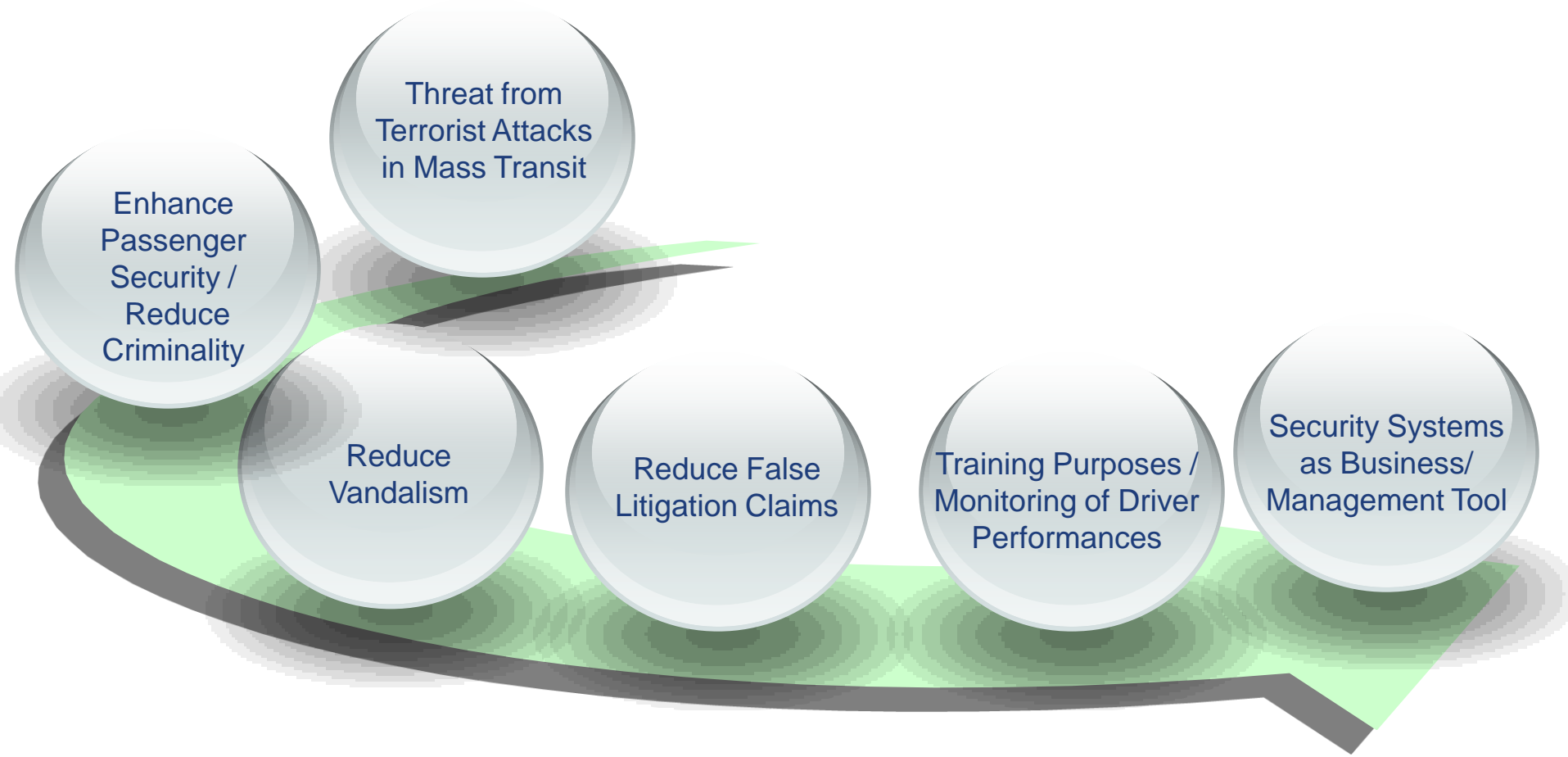
EMEA

NALA

APAC\*\*

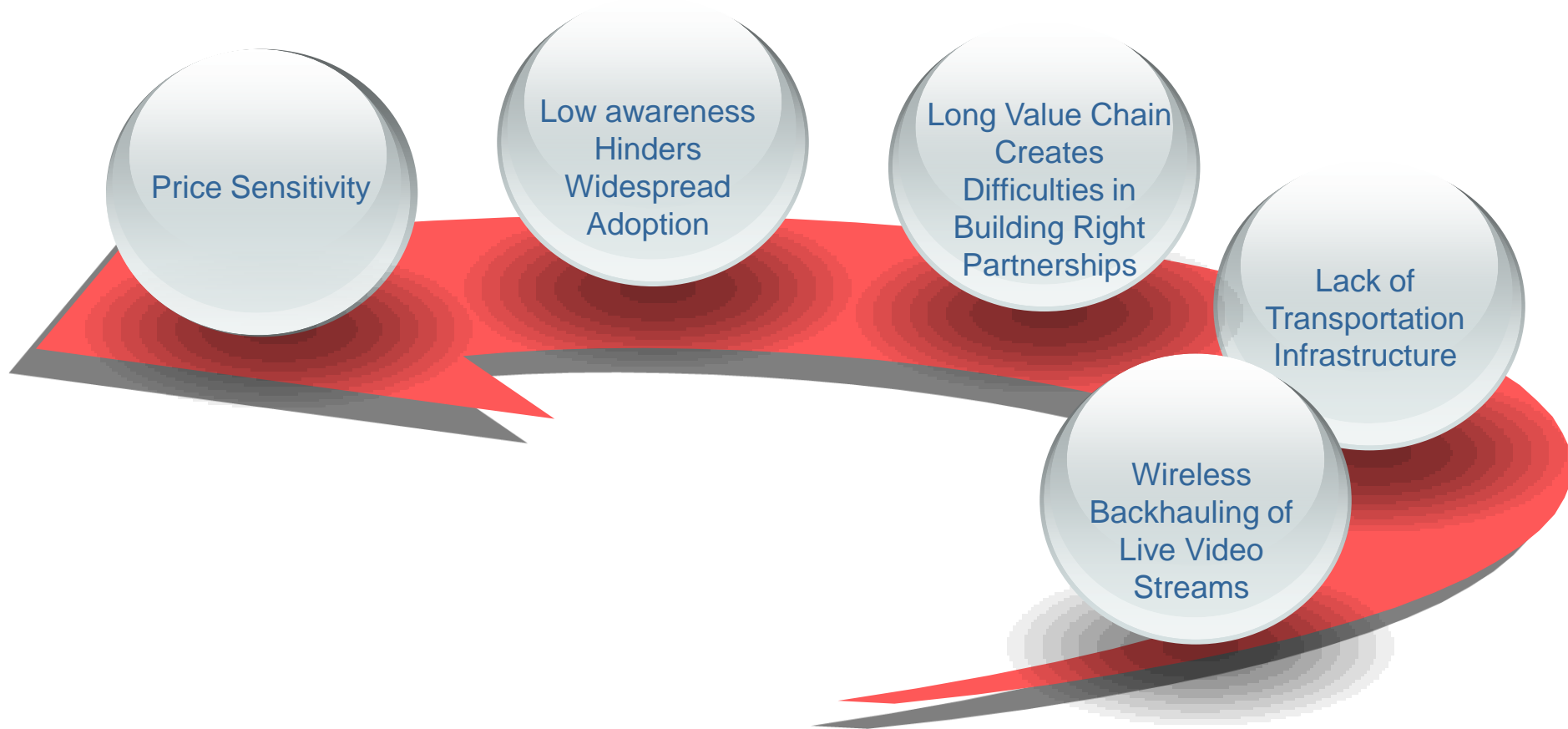
Notes:  
\* Revenues are given only for hardware  
\*\* Excluding Japan  
Base year:2008  
Forecast Period: 2009-2015

# Need to Reduce False Litigation Claims and Increase On-board Security Driving Growth of the Market



*Note: All figures are rounded; the base year is 2008. Source: Frost & Sullivan*

# Low Awareness of Benefits and Price Sensitivity to Hinder Stronger Growth of the Market

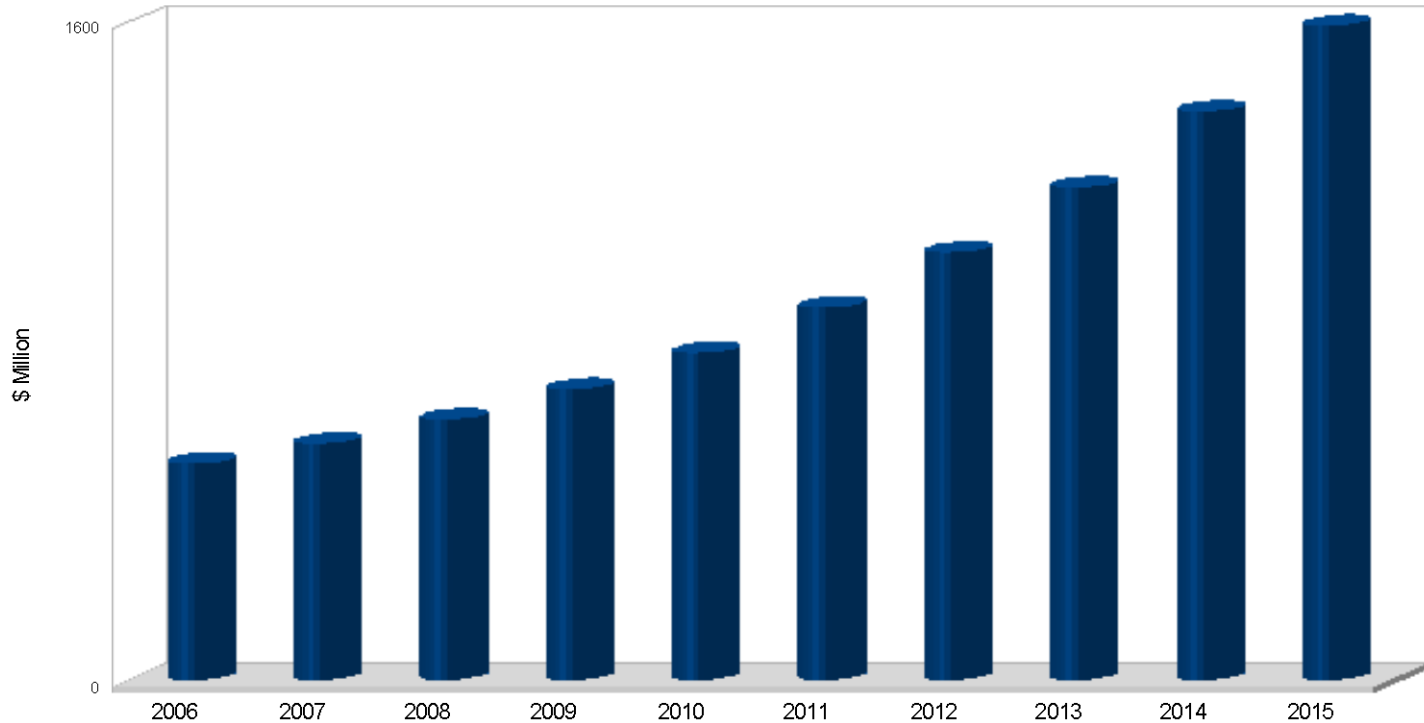


*Note: All figures are rounded; the base year is 2008. Source: Frost & Sullivan*

# Market Growing Steadily throughout Recession

The Worldwide Market for Mobile Video Surveillance

Revenues (2006 - 2015)

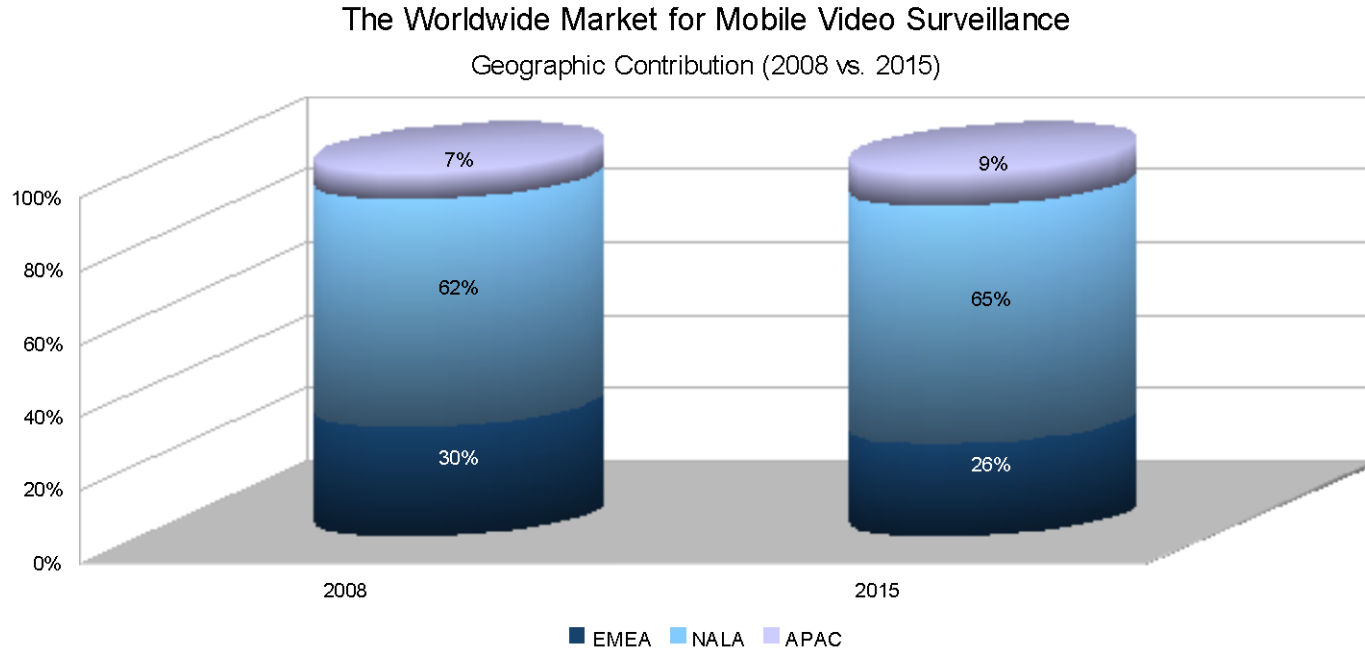


*Note: All figures are rounded; the base year is 2008. Source: Frost & Sullivan*

Vandalism, graffiti in school and transit buses, rail cost millions of dollars to public authorities every year. Presence of cameras play an active deterrent to such acts.

Economic recession reduced CAPEX-intensive investments, however every region presents good opportunities in the mobile video market over the forecast period.

# EMEA to Grow at a Slower Pace than the More Dynamic NALA and APAC Markets



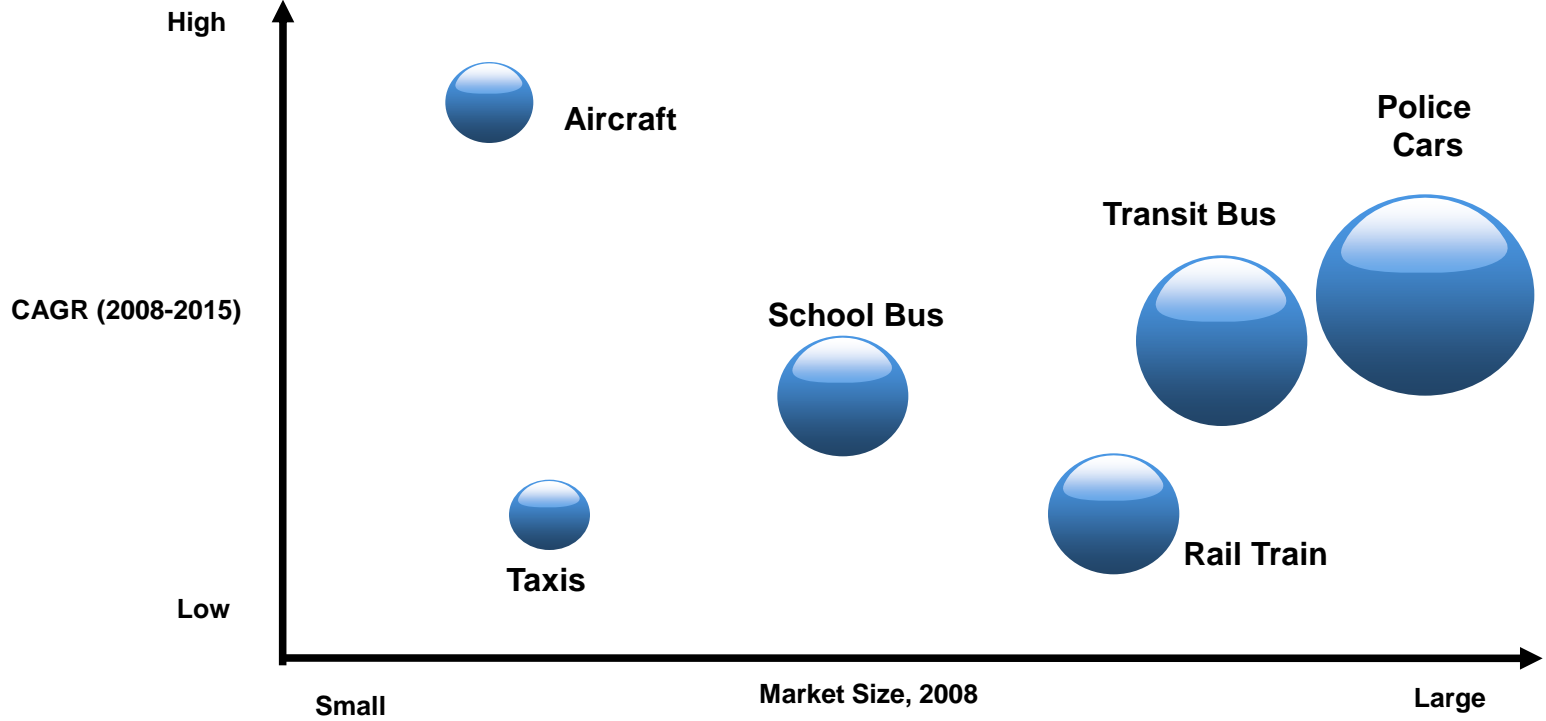
Huge investments in APAC and large fund allocation in the North American region boost growth in those regions

In APAC large opportunities are coming from China (aircraft surveillance), India (airport spending), Singapore and Malaysia, offer a number of challenges in terms of price sensitiveness and little awareness of mobile video surveillance benefits and ROI.

The EMEA market is already relatively mature in many segments and the growth is coming mainly from the MEA region which however offers a little number of opportunities due to its still “embryonic” transportation infrastructure.

# Police Cars and Transit Bus Segments to Drive Growth in the Market

Mobile Video Surveillance Market: Vertical Market Attractiveness (World), 2008-2015

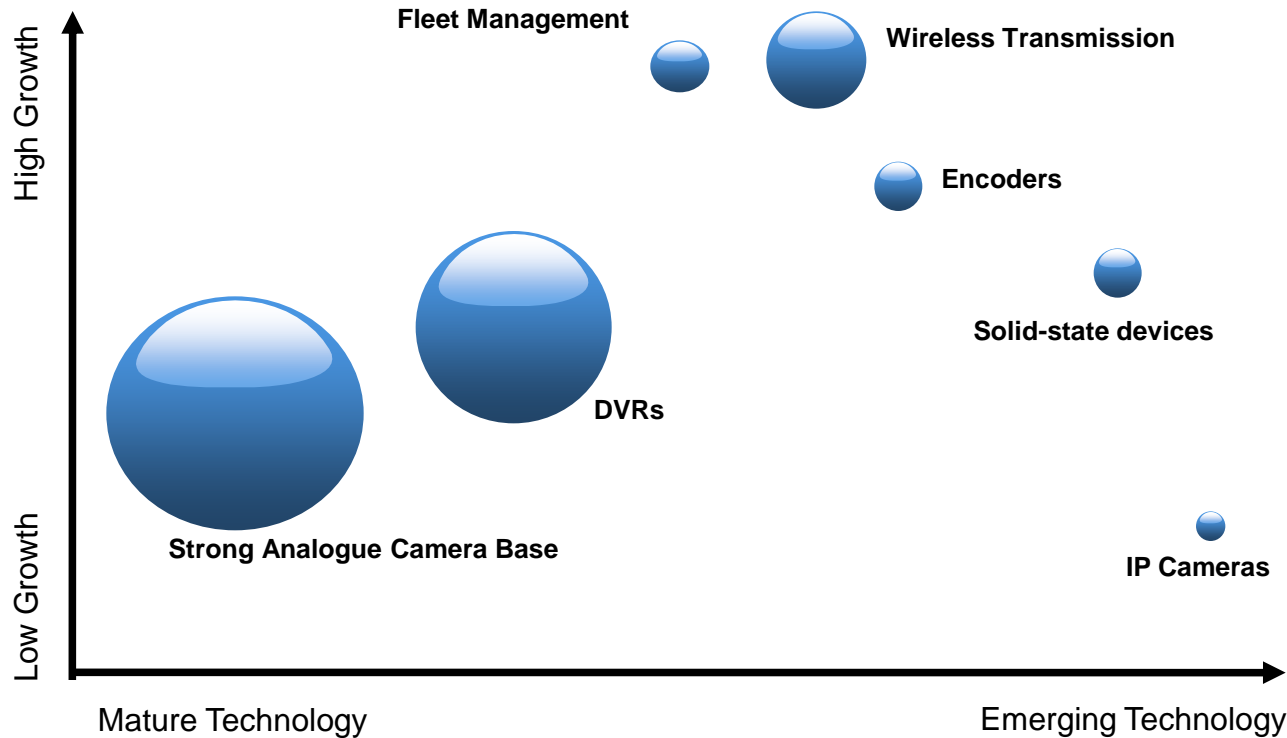


Note: All figures are rounded; the base year is 2008. Source: Frost & Sullivan

- Market driven by growth from law enforcement and transit bus sector due to flow of funds into this sector.
- Aircraft surveillance will witness more demand only from Asian markets.
- School bus and taxi segment, sensitivity to price will keep demand at a moderate level over the forecast period.
- The more mature rail segment will witness a steady but moderate growth throughout the forecast period.

Note: size of balls represents relative market size in 2008

# Price Sensitivity and Limited Advantages to Slow Migration to IP



*Note: All figures are rounded; the base year is 2008. Source: Frost & Sullivan*

Wireless technology expected to drive growth in the mobile segment over the forecast period.

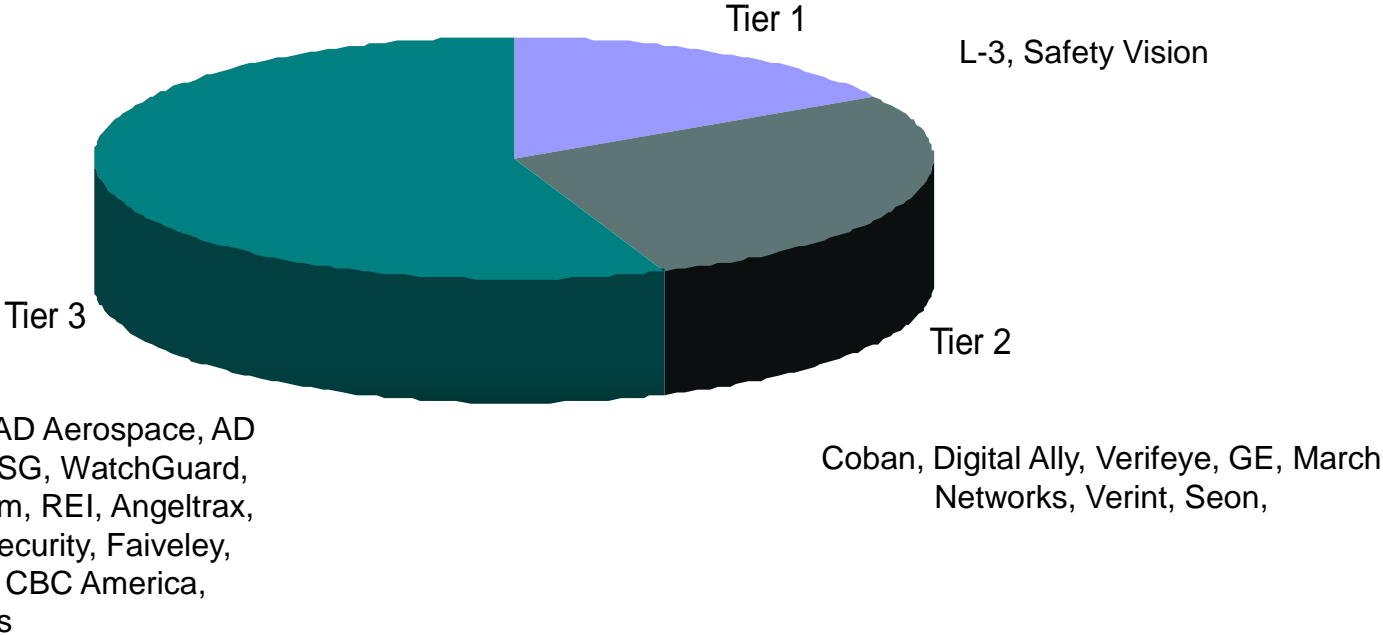
DVR's still widely accepted and most preferred for recording in mobile segment. Solid-state still emerging and expected to take-off at the end of the forecast period.

Move to IP relatively slow with adoption of encoders only in rail.

Note: size of balls represents relative market size in 2008

# Companies Leverage their Existing Know-how to Tap Growth Opportunities in Emerging Segments

Mobile Video Surveillance: Market Share Analysis (World), 2008



*Note: All figures are rounded; the base year is 2008. Source: Frost & Sullivan*

Note: In terms of revenue contribution to total mobile video surveillance market.

# Enhancing ROI and Educating End-users Essential to Drive Growth in the Market

Market relatively unhindered by economic recession thanks to regulations and need to reduce vandalism/crime

Market fragmented with good potential for those (upcoming) players who are able to establish relationship in long transportation value chain



## Key Trends & Conclusions

Increase use of wireless for video streaming and enhanced recording capabilities to offer growth and differentiations opportunities in the market

North America, Asia and Middle East to offer high growth rates. Maturity in Europe and lack of infrastructure in Africa to hinder growth in the region.

Aircraft, police cars and transit bus to offer high growth rates. Price sensitivity to hinder growth in taxis and school bus market

*Note: All figures are rounded; the base year is 2008. Source: Frost & Sullivan*

# Next Steps

- ✓ Obtain a Frost & Sullivan Strategic Approach document for a **Growth Partnership Service or Consulting Service to support you and your team to accelerate the growth of your company.**  
([myfrost@frost.com](mailto:myfrost@frost.com)) +44 (0)20 7343 8383
- ✓ Join us at Frost & Sullivan's **GIL 2010: Growth, Innovation and Leadership: A Frost & Sullivan Global Congress on Corporate Growth Event**  
([www.gil-global.com](http://www.gil-global.com))
- ✓ Register for the next **Chairman's Series on Growth: The CEO's Perspective on Challenges and Strategies for Growth 2009**  
12 August 2009 10:00am BST ([www.frost.com/growthEU](http://www.frost.com/growthEU))
- ✓ Register for a complimentary Frost & Sullivan's **Growth Opportunity Newsletter** and keep abreast of innovative growth opportunities in your industry  
([www.frost.com/news](http://www.frost.com/news))

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## What would you like to see from Frost & Sullivan?

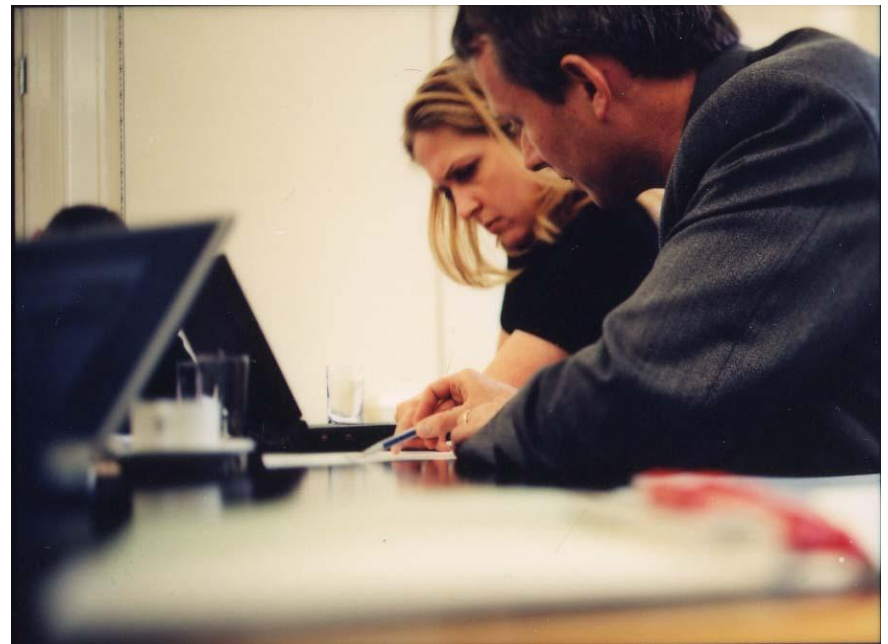
Growth Forecasts?

Competitive Structure?

Emerging Trends?

Strategic Recommendations?

Other?



Please inform us by taking our survey.

# For Additional Information

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