

# IP-BASED INTERCOM & PA SYSTEMS



## US Markets, Technologies & Competition: 2007-2012 Analysis & Forecasts

>> Commercial/Retail >> Education >> Enterprise >> Government/Defense >> Healthcare  
>> Hospitality >> Industrial >> Residential >> Security >> Transportation

**Publication Date: February 2008**

**Pages: 138**

# THIS REPORT CONTAINS...

WITHIN THIS REPORT YOU WILL FIND INFORMATION HELPFUL IN

- Market sizing by product type and market
- Developing Marketing Strategies
- Assessing End-User Needs
- Finding New Regional Markets
- Approaching New Channels of Distribution
- Analyzing the Competition
- Creating Forecast Models Based on Market Trends
- Preparing Internal Market Research Reports
- Making Presentations to Sales & Marketing Teams

## WHO SHOULD USE THIS REPORT

- Manufacturers of IP-based intercoms & PA systems
- Senior Marketing Management
- Sales Teams
- Internal Reference Libraries
- Investment Bankers
- Venture Capitalists – Distributors
- Manufacturers Representatives
- Government Agencies

## MARKET STATISTICS

- Market Demand by End-User Industry: 2007-2012
- Historical Market Statistics: 2004-2006
- Actual versus Potential Market Demand
- Shifts in Market Dynamics
- High-growth Markets: Healthcare, Education, etc...
- Industry Growth, Trends and Analysis

## IN-DEPTH ANALYSIS OF MARKET TRENDS

- What forces currently drive the IP-based communications industry, and what to expect in both the short and long-term
- How competing technologies, such as wired and wireless networks, will affect future market demand
- How convergence of audio and video applications will affect future network design



## GLOBAL COMPETITIVE ENVIRONMENT

- Market Share by Vendor Sales and Market (e.g., Digital Acoustics, Aiphone, Barix, GE/Dukane...)
- Comparison of Vendor Pricing
- Strategies for Market Competition
- New Market Entrants
- Distribution Channels
- Global Market Share by Product Type

## END-USER ANALYSIS

- What are end-users looking for— criteria for product and vendor selection
- Purchasing trends based on end-use markets and application
- Discounting
- Product Sophistication
- Technological Innovation

## TECHNOLOGY AND PRODUCT DEVELOPMENT

- Developments in transmission and delivery platforms
- New Technologies and Market Impact
- Architectural & Engineering Specifications
- Product Introductions
- Product Comparisons
- Pricing by product type

## FUTURE OUTLOOK

- Product Forecasts through 2012
- How end-use product demand trends will impact market growth and development
- Shifts in supplier and distribution channels
- Research and development and potential product developments

## SUMMARY

### PRODUCTS COVERED

- IP-based Intercoms (integrated, discrete)
- IP-based PA Systems (integrated, discrete)

### END-USER MARKETS COVERED

- Security – Education
- Industrial – Commercial/Retail
- Enterprise – Residential
- Healthcare – Hospitality
- Government/Defense – Transportation

### COUNTRIES COVERED

- United States

### CONNECTION TYPES COVERED

- Category 5/5e/6
- Fiber Optic
- Wireless

# SECTIONS OVERVIEW

## INTRODUCTION

- Study Scope: Products & Geography
- End-User Industries Covered
- Report Objectives
- Methodology & Sources
- Statistical Notes

## SECTION ONE: TECHNOLOGY OVERVIEW

- Definitions
- Intercom System
- PA (Public Address) System
- Integrated and Discrete intercom/PA System
- Standards
  - Underwriters Laboratories (UL)
  - National Fire Protection Agency (NFPA)
  - National Electrical Manufacturers Association (NEMA)

- Telecommunications Industry Association/Electronics Industry Association (TIA/EIA)
- IP-Based Networks
  - VoIP (Voice over Internet Protocol)
  - SIP Technology –Note on SIP Endpoints
  - Drawbacks to SIP
  - Advantages of IP-based Networks
- Type of Networks by Connection
  - Wired Ethernet Networks – Open File Format
  - Cabling & Installation – Structured wiring
  - Power-over-Ethernet (PoE) or "Active Ethernet"
  - Wireless Networks
  - WiFi 802.11 Wireless Network
- Technology Outlook
  - Developing Standards and Transmission Platforms
  - Convergence of audio and video conferencing
  - Delivery of Video Content

## SECTION TWO: MARKET OVERVIEW

- Total US Market for IP-based Intercom and PA Systems by Market: (\$Millions): 2004-2012
- Total US TAM (Total Addressable Market) for IP-based Intercom & PA Systems by Market (SMM): 2004-2012
  - Year-over-Year Percentage Change in Demand by End-User Market (%/SMM)
  - US Market Penetration Rates of IP-based Systems by Market and Year
  - Emergency Use — NFPA Ratings
- Competitive Environment
- Producer Sales and Market Share: (\$Millions): 2006-2007 (Barix, Digital Acoustics, Aiphone, etc.)
- Producer Product Matrix by End-User Market
  - Product Differentiation: True IP, Structured Wiring, PoE
  - General Warranty Standards and Service Contracts
  - New Market Entrants — Barriers to Market Entry
  - Type of Companies: Startups, Legacy Companies
- Future Outlook
  - Changes in Transmission Protocols and Delivery Platforms

## SECTION THREE: SECURITY MARKET

- General Market Trends
- Security Market Demand by Type of Facility: (\$Millions): 2004-2012
  - High Security — Government Facilities
  - Parking Complexes — Lobby/Entrances
  - Public Areas — Emergency Stations
- Security Market Demand by Type of Facility: (Units): 2004-2012
- Average Selling Price by Facility Type (\$/Unit)
  - Pricing Trends
- CAGR by Type of Facility (SMM): 2004-2012
  - Year-over-Year Percentage Growth by Facility
- Distribution Channels
- Market Demand by Channel of Distribution: (\$Millions): 2004-2012
  - Integrator — Distributor
  - Direct to end-user
- CAGR by Distribution Channel (SMM): 2004-2012
  - Year-over-Year Percentage Growth by Distribution Channel
- Market by System Type
  - Market Demand by System Type (\$Millions): 2004-2012
  - Integrated — Discrete
- CAGR by System Type (SMM): 2004-2012
  - Year-over-Year Percentage Growth by System Type
- Market by Type of Connection
  - Market Demand by Connection Type (\$Millions): 2004-2012
  - Category 5/5e/6
  - Fiber Optic — Wireless
- CAGR by Connection Type (SMM): 2004-2012
  - Year-over-Year Percentage Growth by Connection Type
- Competitive Environment
  - Producer Sales and Market Share: (\$Millions): 2006-2007
  - General Warranty Standards and Service Contracts
  - Barriers to Market Entry
- Future Outlook

## SECTION FOUR: EDUCATION MARKET

- General Market Trends
- Education Market Demand by Type of Facility: (\$Millions): 2004-2012
  - Higher education
  - Private/vocational
  - Elementary school
  - High school — Middle school

- Education Market Demand by Type of Facility: (Units): 2004-2012
- Average Selling Price by Facility Type (\$/Unit)
  - Year-over-Year Percentage Growth by Facility
- Distribution Channels
- Market Demand by Channel of Distribution: (\$Millions): 2004-2012
  - Integrator — Distributor
  - Direct to end-user
- CAGR by Distribution Channel (SMM): 2004-2012
  - Year-over-Year Percentage Growth by Distribution Channel
- Market by System Type
  - Market Demand by System Type (\$Millions): 2004-2012
  - Integrated
  - Discrete
- CAGR by System Type (SMM): 2004-2012
  - Year-over-Year Percentage Growth by System Type
- Market by Type of Connection
  - Market Demand by Connection Type (\$Millions): 2004-2012
  - Category 5/5e/6
  - Fiber Optic — Wireless
- CAGR by Connection Type (SMM): 2004-2012
  - Year-over-Year Percentage Growth by Connection Type
- Competitive Environment
  - Producer Sales and Market Share: (\$Millions): 2006-2007
  - General Warranty Standards and Service Contracts
  - Barriers to Market Entry
- Future Outlook

## SECTION FIVE: INDUSTRIAL MARKET

- General Market Trends
- Industrial Market Demand by Type of Facility: (\$Millions): 2004-2012
  - Factory — Interbuilding
  - Common Areas
- Industrial Market Demand by Type of Facility: (Units): 2004-2012
- Average Selling Price by Facility Type (\$/Unit)
  - Year-over-Year Percentage Growth by Facility
- Distribution Channels
- Market Demand by Channel of Distribution: (\$Millions): 2004-2012
  - Integrator — Distributor
  - Direct to end-user
- CAGR by Distribution Channel (SMM): 2004-2012
  - Year-over-Year Percentage Growth by Distribution Channel
- Market by System Type
  - Market Demand by System Type (\$Millions): 2004-2012
  - Integrated — Discrete

- CAGR by System Type (SMM): 2004-2012
  - Year-over-Year Percentage Growth by System Type
- Market by Type of Connection
  - Market Demand by Connection Type (\$Millions): 2004-2012
  - Category 5/5e/6
  - Fiber Optic — Wireless
- CAGR by Connection Type (SMM): 2004-2012
  - Year-over-Year Percentage Growth by Connection Type
- Competitive Environment
  - Producer Sales and Market Share: (\$Millions): 2006-2007
  - General Warranty Standards and Service Contracts
  - Barriers to Market Entry
- Future Outlook

## SECTION SIX: COMMERCIAL/RETAIL MARKET

- General Market Trends
- Commercial/Retail Market Demand by Type of Facility: (\$Millions): 2004-2012
  - Malls — Storefront — Other
- Commercial/Retail Market Demand by Type of Facility: (Units): 2004-2012
- Average Selling Price by Facility Type (\$/Unit)
  - Year-over-Year Percentage Growth by Facility
- Distribution Channels
- Market Demand by Channel of Distribution: (\$Millions): 2004-2012
  - Integrator — Distributor
  - Direct to end-user
- CAGR by Distribution Channel (SMM): 2004-2012
  - Year-over-Year Percentage Growth by Distribution Channel
- Market by System Type
  - Market Demand by System Type (\$Millions): 2004-2012
  - Integrated
  - Discrete
- CAGR by System Type (SMM): 2004-2012
  - Year-over-Year Percentage Growth by System Type
- Market by Type of Connection
  - Market Demand by Connection Type (\$Millions): 2004-2012
  - Category 5/5e/6
  - Fiber Optic — Wireless
- CAGR by Connection Type (SMM): 2004-2012
  - Year-over-Year Percentage Growth by Connection Type
- Competitive Environment
  - Producer Sales and Market Share: (\$Millions): 2006-2007
  - General Warranty Standards and Service Contracts
  - Barriers to Market Entry
- Future Outlook



## MOBILE & WIRED COMMUNICATIONS



### SECTION SEVEN: ENTERPRISE MARKET

- General Market Trends
- Enterprise Market Demand by Type of Facility: (\$Millions): 2004-2012
- Enterprise Market Demand by Type of Facility: (Units): 2004-2012
  - Commercial Office – Interbuilding – Other
- Average Selling Price by Facility Type (\$/Unit)  
Year-over-Year Percentage Growth by Facility
- Distribution Channels
- Market Demand by Channel of Distribution: (\$Millions): 2004-2012
  - Integrator – Distributor
  - Direct to end-user
- CAGR by Distribution Channel (SMM): 2004-2012  
Year-over-Year Percentage Growth by Distribution Channel
- Market by System Type  
Market Demand by System Type (\$Millions): 2004-2012
  - Integrated – Discrete
- CAGR by System Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by System Type
- Market by Type of Connection  
Market Demand by Connection Type (\$Millions): 2004-2012
  - Category 5/5e/6
  - Fiber Optic – Wireless
- CAGR by Connection Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by Connection Type
- Competitive Environment  
Producer Sales and Market Share: (\$Millions): 2006-2007
  - General Warranty Standards and Service Contracts
  - Barriers to Market Entry
- Future Outlook

### SECTION EIGHT: RESIDENTIAL MARKET

- General Market Trends
- Residential Market Demand by Type of Facility: (\$Millions): 2004-2012
  - Multi-Unit Hi-Rise – Multi-Unit Single
  - Single Unit – Other
- Residential Market Demand by Type of Facility: (Units): 2004-2012
- Average Selling Price by Facility Type (\$/Unit)  
Year-over-Year Percentage Growth by Facility
- Distribution Channels
- Market Demand by Channel of Distribution: (\$Millions): 2004-2012
  - Integrator – Distributor
  - Direct to end-user
- CAGR by Distribution Channel (SMM): 2004-2012  
Year-over-Year Percentage Growth by Distribution Channel

- Market by System Type  
Market Demand by System Type (\$Millions): 2004-2012
  - Integrated – Discrete
- CAGR by System Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by System Type
- Market by Type of Connection  
Market Demand by Connection Type (\$Millions): 2004-2012
  - Category 5/5e/6
  - Fiber Optic – Wireless
- CAGR by Connection Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by Connection Type
- Competitive Environment  
Producer Sales and Market Share: (\$Millions): 2006-2007
  - General Warranty Standards and Service Contracts
  - Barriers to Market Entry
- Future Outlook

### SECTION NINE: HEALTHCARE MARKET

- General Market Trends
- Healthcare Market Demand by Type of Facility: (\$Millions): 2004-2012
  - Hospitals – Managed care
  - Specialty clinics – Research institutions
- Healthcare Market Demand by Type of Facility: (Units): 2004-2012
- Average Selling Price by Facility Type (\$/Unit)  
Year-over-Year Percentage Growth by Facility
- Distribution Channels
- Market Demand by Channel of Distribution: (\$Millions): 2004-2012
  - Integrator – Distributor
  - Direct to end-user
- CAGR by Distribution Channel (SMM): 2004-2012  
Year-over-Year Percentage Growth by Distribution Channel
- Market by System Type  
Market Demand by System Type (\$Millions): 2004-2012
  - Integrated
  - Discrete
- CAGR by System Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by System Type
- Market by Type of Connection  
Market Demand by Connection Type (\$Millions): 2004-2012
  - Category 5/5e/6
  - Fiber Optic – Wireless
- CAGR by Connection Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by Connection Type
- Competitive Environment  
Producer Sales and Market Share: (\$Millions): 2006-2007
  - General Warranty Standards and Service Contracts
  - Barriers to Market Entry
- Future Outlook

### SECTION TEN: HOSPITALITY MARKET

- General Market Trends
- Hospitality Market Demand by Type of Facility: (\$Millions): 2004-2012
  - Hotels – Resorts
  - Restaurants – Other
- Hospitality Market Demand by Type of Facility: (Units): 2004-2012
- Average Selling Price by Facility Type (\$/Unit)  
Year-over-Year Percentage Growth by Facility
- Distribution Channels
- Market Demand by Channel of Distribution: (\$Millions): 2004-2012
  - Integrator – Distributor
  - Direct to end-user
- CAGR by Distribution Channel (SMM): 2004-2012  
Year-over-Year Percentage Growth by Distribution Channel
- Market by System Type  
Market Demand by System Type (\$Millions): 2004-2012
  - Integrated – Discrete
- CAGR by System Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by System Type
- Market by Type of Connection  
Market Demand by Connection Type (\$Millions): 2004-2012
  - Category 5/5e/6
  - Fiber Optic – Wireless
- CAGR by Connection Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by Connection Type
- Competitive Environment  
Producer Sales and Market Share: (\$Millions): 2006-2007
  - General Warranty Standards and Service Contracts
  - Barriers to Market Entry
- Future Outlook

### SECTION ELEVEN: GOV'T/DEFENSE MARKET

- General Market Trends
- Government/Defense Market Demand by Type of Facility: (\$Millions): 2004-2012
  - Office Buildings – Defense Facilities
  - Defense Vehicles – Other
- Government/Defense Market Demand by Type of Facility (Units): 2004-2012
- Average Selling Price by Facility Type (\$/Unit)  
Year-over-Year Percentage Growth by Facility
- Distribution Channels
- Market Demand by Channel of Distribution: (\$Millions): 2004-2012
  - Integrator – Distributor
  - Direct to end-user
- CAGR by Distribution Channel (SMM): 2004-2012  
Year-over-Year Percentage Growth by Distribution Channel
- Market by System Type  
Market Demand by System Type (\$Millions): 2004-2012
  - Integrated – Discrete
- CAGR by System Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by System Type
- Market by Type of Connection  
Market Demand by Connection Type (\$Millions): 2004-2012
  - Category 5/5e/6
  - Fiber Optic – Wireless
- CAGR by Connection Type (SMM): 2004-2012  
Year-over-Year Percentage Growth by Connection Type
- Competitive Environment  
Producer Sales and Market Share: (\$Millions): 2006-2007
  - General Warranty Standards and Service Contracts
  - Barriers to Market Entry
- Future Outlook

