

# IDC MarketScape: Worldwide Video Surveillance Camera 2023 Vendor Assessment

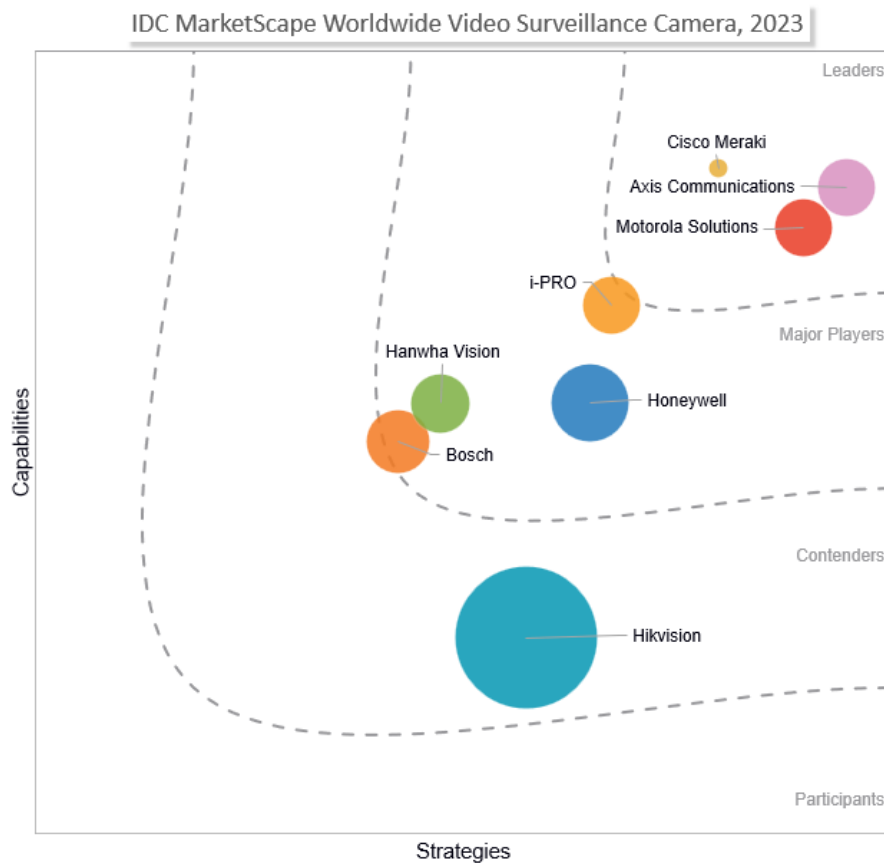
Mike Jude

THIS IDC MARKETSCAPE EXCERPT FEATURES AXIS COMMUNICATIONS

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Video Surveillance Camera Vendor Assessment



Source: IDC, 2023

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Video Surveillance Camera 2023 Vendor Assessment (Doc # US51309223). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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IDC estimates that there are in excess of one and a half billion video surveillance cameras currently in use globally. This population of cameras has an average per unit lifetime of nearly 10 years. As a result, the global surveillance camera population is characterized by a large, embedded base, and although demand is increasing as new uses are found for video data, the challenge to video surveillance camera manufacturers is to sell into a market that has largely defined its operating parameters.

Demand for cameras is driven by the applications to which video data can be applied. This is dependent on the analytics that utilize video data to produce actionable information. Because of this software dependency, much of the competitive terrain is defined by the degree to which cameras are compatible with analytics that matter to users. Cameras which can apply analytics locally or which can communicate with centralized analytics have an advantage over those that don't. In fact, it is the very question of compatibility that drives users to seek new video camera solutions; even when the cameras that they currently use are still perfectly functional.

This symbiosis between cameras and software, as noted, is driving growth in the market. However, when selecting video surveillance technology, users must be sensitive to the type and quality of data that a camera can provide. Parameters such as frame rate, resolution, weather hardening, and so forth become important if, for example, a camera must be able to read license plates in heavy traffic along a roadway that may suffer significant changes in weather conditions. Since the number of and type of applications can vary significantly from user to user, manufacturers must have a substantial quiver of potential camera types and camera solutions to satisfy the specific needs of each customer.

This IDC MarketScape is focused on the ability of camera manufacturers to address this evolving market. Especial attention has been devoted to technical capabilities, breadth of camera offerings, and ability to support the increasingly detailed needs of analytic engines. While actual analytic capabilities are not the focus of this study, some attention has been given to whether manufacturers have or can interface with analytics applications.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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To be included in this study, IDC asked vendors to satisfy the following requirements:

- **Have a global footprint, operating in more than one country:** In recent surveys, physical security professionals indicated that they preferred vendors that could provide solutions to global operations. This study valued vendors whose footprint was not focused on a single geography.

- **Offer a wide variety of camera types:** As noted previously, many organizations have differing applications requiring a wide variety of camera types. This study valued vendors whose camera portfolio could accommodate multiple sets of discrete camera requirements.
- **Have been in business for a minimum of three years:** Once again, survey results indicate that vendors that can show longer participation in the market are favored by users. The reason is that the video surveillance market is evolving quickly, and longevity indicates that the vendor in question has been able to participate effectively as this evolution has taken place. Longevity also indicates a higher probability of participating in the future.
- **Sell to commercial and governmental customers:** Sales to commercial and governmental customers of video surveillance cameras must total, at least, \$20 million (following generally accepted accounting principles [GAAP]) in calendar year 2022 or has shown positive year-over-year revenue growth of 10% or more for its camera offerings. As in the aforementioned requirement, survey respondents indicate that they favor companies that are profitable and which are expected to stay profitable in the future. This indicates that when future requirements need to be satisfied, the vendor will be around to address them.

Although many vendors were approached to participate in this study, not all could satisfy the requirement or chose not to disclose information that could be used to assess their qualifications. Despite this, several vendors, with a substantial impact on the market, were included anyway by assessing their qualifications through secondary research.

## ADVICE FOR TECHNOLOGY BUYERS

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IDC has noted that technology purchases should always be made beginning with an evaluation of the intended outcomes and a comprehensive assessment of technology requirements. In the case of video surveillance cameras, this notion is especially important. As video data becomes an important source of business telemetry, selecting cameras strictly based on safety and security needs may be short sighted when contemplating future uses for video data.

However, there are several considerations that should apply to any selection of video surveillance technology. These include:

- **Assess your needs, not just for the present but for the future:** It is easy to think in terms of present needs and discount future needs. However, with camera lifetimes approaching 10 years, it is important to plan for potential uses of video data as well. Acquiring simple IP-based cameras may not be capable of providing data of sufficient resolution or analytic capability and probably won't enable applications that depend on precise measurement or object recognition.
- **Pay attention to vendor strategic plans:** In line with the aforementioned consideration, vendors should have a plan for future product developments. This is important because potential applications for video data will change over time and users need to be assured that when those applications arrive, the vendor will be prepared to address them.
- **Insist on simplicity:** Complex solutions are hard to implement and hard to maintain. Vendors should provide technology that can be quickly adopted and can be fixed quickly when it fails. There are many technology products that consume inordinate amounts of resources: often with marginal returns on investment. Users should ask for references from vendors and should conduct the appropriate amount of due diligence before adopting a vendor's video solutions.

It also bears noting that there are many new entrants in the video surveillance camera space. This is good for innovation but comes with risks that these new entrants may not be compatible with existing infrastructure. Care must be exercised when adopting a cutting-edge solution.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### Axis Communications

Axis Communications is positioned as a Leader in this 2023 IDC MarketScape for worldwide video surveillance camera.

Axis provides a wide variety of video surveillance cameras designed to address user needs that are rapidly changing. Axis solutions include robust outdoor cameras that operate in extreme temperatures and cameras for dangerous environments (including explosion-protected camera for Zone/Division 2 hazardous areas), an expanding line of easy-to-use and rugged body worn cameras and accessories suitable for many applications, discreet cameras for sensitive environments such as onboard vehicle cameras or inconspicuous modular cameras, and fused technologies that combine several powerful tools into one device, including a radar-video fusion camera with object analytics for heightened detection and visualization.

In addition to Axis' commitment to enable deep learning capabilities at the edge via the company's ARTPEC-8 system on chip (SoC) – the basis for the majority of its network video products – Axis has also made a significant commitment to ensuring the cybersecurity of its cameras. Its cameras possess built-in cybersecurity features such as Axis Edge Vault that automatically enables secure identification of new devices at installation, Axis signed video that adds a cryptographic checksum to each video frame to verify video hasn't been tampered with, and Trusted Platform Module (TPM) hardware component that ensures cryptographic keys and certificates are safe and secure.

### Strengths

Axis is one of the larger video surveillance camera providers in the global market. Through its extensive distribution network and ability to operate virtually within any video surveillance ecosystem, it is positioned to benefit greatly from the increasing demand for intelligent solutions and the market's continuing departure from Chinese manufacturers. In addition, by utilizing increasingly sophisticated analytics which can reside in the camera, Axis is able to deliver video surveillance solutions that not only operate within current video ecosystems but which are compatible with the increasing focus of the market on business analytics. Finally, Axis has a well-articulated strategy for future enhancements and has quickly pivoted to address the market's new focus on business analytics.

### Challenges

Axis has accelerated its investments in video analytics in recent years and has also expanded its sensor offerings, yet in some respects, it has played catchup with the latest cutting-edge solutions available in the market. In addition, Axis does not position itself as the lowest cost camera. Often considered a premium solution, Axis focuses on durability, scalability, and added value. Therefore, its cameras can be expected to last, reducing the overall total cost of ownership, and they are designed to grow with an end user's expanding operations and changing needs.

## ***Consider Axis Communications When***

Users who are planning upgrades to their existing camera constellation should consider Axis. Axis cameras can coexist with virtually any VMS or video analytics solution – their open architecture allows for easy integration with other technologies and third-party applications. Those seeking more holistic solutions can benefit from their interoperability with other devices such as speakers and access control units. Axis Communications is a solid choice for companies seeking intelligent solutions to improve security, enhance operations, and future proof their business, especially those currently facing the need to change out Chinese made equipment.

## **APPENDIX**

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### **Reading an IDC MarketScape Graph**

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor’s current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor’s future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

Once again, it is important to note that an IDC MarketScape is not a “beauty contest” where relative positions in the IDC MarketScape graph compare one vendor to another. In fact, positions on the graph denote the relative positions of the vendors against market needs as disclosed by IDC user surveys. This means the readers will need to decide to what extent their acquisition plans conform to current needs or future needs. Once that has been decided, vendors should be selected that most address those requirements.

### **IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and

interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

Video surveillance cameras are those fixed and mobile cameras that are used to monitor secured and production environments. Fixed cameras include IP and CCTV cameras that are mounted in strategic locations. IP cameras capture digital video and use Ethernet networks to stream video to onsite or offsite networks. CCTV cameras are analog cameras that utilize coax cable to stream video to onsite and offsite facilities. Fixed surveillance cameras solutions can be configured based on location topography, weather conditions, and changes in daily light conditions. Mobile cameras can include body cams and vehicle-mounted cameras.

## LEARN MORE

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Interested readers should explore the following associated studies. In particular, those studies which relate the video surveillance camera market to other physical security technology markets are a useful way to understand how the various camera manufacturers are positioning their cameras to support a larger physical security ecosystem.

## Related Research

- *Worldwide Physical Security Technology Forecast, 2023-2028: Physical Security Technology Market Growing in Response to Increasing Desire to Leverage Business Telemetry* (IDC #US51161623, August 2023)
- *A New Vision for Physical Security Technology: Making Physical Security Invisible* (IDC #US50790623, June 2023)
- *Worldwide Video Surveillance Camera Market Shares, 2022: Increasing Competition and a Focus on Business* (IDC #US50601523, May 2023)
- *Worldwide Video Surveillance Camera Forecast: 2022-2026* (IDC #US49521922, August 2022)
- *Video Surveillance in Business Intelligence: Video Data as a Corporate Asset* (IDC #US47700422, July 2022)
- *What Do Enterprise Decision Makers Think About Physical Security Technology?* (IDC #US49096122, May 2022)
- *IDC's Macroeconomic Forecast Assumptions, April 2023* (IDC #US50604423, May 2023)
- *The State of the Physical Security Technology Market: Results from the 2022 IDC Physical Security Technology Market Survey* (IDC #US49029622, April 2022)
- *Video Surveillance and Physical Security: Integrating Video Telemetry into a Comprehensive, Situationally Aware Security Capability* (IDC #US48955521, March 2022)

## Synopsis

This IDC study discusses vendor assessment of video surveillance camera market for 2023. The video surveillance camera market is showing substantial growth and is characterized by a high degree of innovation. This year's IDC MarketScape discloses that technology vendors are delivering current capabilities that meet existing user needs but are rapidly evolving their solutions to address future

applications for video observation data. While several low cost providers are increasingly denied market access, users are becoming more focused on the value of video solutions rather than the cost.

According to Mike Jude, IDC research director for Video Surveillance and AI Video Analytics, “Video data is becoming an important tool enabling business process analysis and optimization. Our IDC MarketScape analysis demonstrates that video technology vendors recognize this increasing business importance and are developing solutions that will enhance the capabilities of video surveillance cameras to not only address safety and security applications but also to provide useful business telemetry.”

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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