



BRIVO  
SMART SECURITY  
TRENDS REPORT  
PHYSICAL SECURITY  
DISRUPTION IN  
THE COVID ERA



## 2020 IN THE REAR VIEW MIRROR. WHAT'S NEXT FOR 2021?

The impacts of COVID continue to plague organizations and force them to adapt to the realities of today. Luckily, the massive work-from-home movement is now a regular routine. But as greater portions of the nation become vaccinated and businesses begin to start reopening their doors to employees, customers, and students, it's important to take a look at key trends that will help organizations rebound better.

This report consists of insights gleaned from Brivo's fifth annual Physical Security Industry Survey. This survey was fielded from November 2020–January 2021 of 500+ U.S.-based physical security and facility management professionals. Our survey focused on physical security impacts from COVID, challenges facing organizations as they look to reopen their doors, as well as technology, cloud, and data utilization trends shaping the physical security landscape for 2021.

### 4 Key Trends Explored:

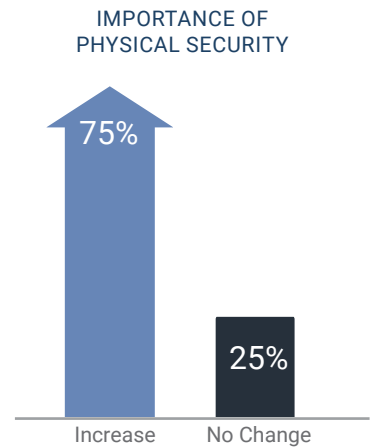
1. COVID changes physical security priorities
2. Technology integrations continue to be a major focus
3. Cloud adoption accelerates security modernization
4. Data analytics helps navigate the next era of access control

# COVID CHANGES PHYSICAL SECURITY AND FACILITY MANAGEMENT PRIORITIES

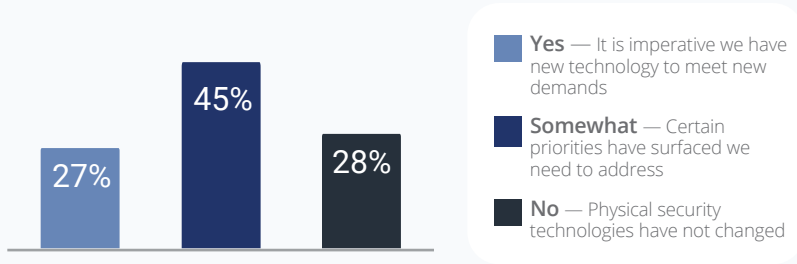
For security and facility managers, COVID presented new and unique challenges that put them on the front lines in protecting people, property and assets, as well as health-safety. Organizations that had workers on-site to perform essential services had to enforce new health-safety protocols. Businesses with a primarily remote workforce had to monitor and manage access to an empty, and therefore vulnerable, building. For many, this meant putting greater focus on physical security, including health-safety features, to adapt to the COVID era. This was the case for 75% of respondents in our survey that said the pandemic increased the importance of physical security at their organization.

The pandemic greatly accelerated one key digital transformation trend: security and facility managers now recognize the need for cloud solutions. A full 60% of respondents say they either see a need for immediate cloud technology upgrades or are considering it in the future. For an industry that has traditionally been slow to adopt new technology, this is a major shift in how security and facility management leaders are recognizing the benefits that cloud technology can provide them.

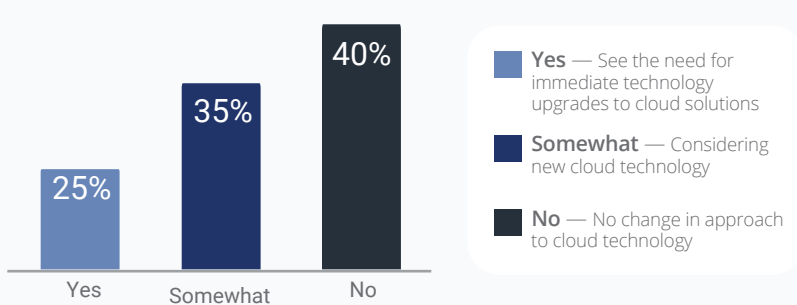
**75%**  
Increased the importance of physical security for their organization



## PHYSICAL SECURITY TECHNOLOGY PRIORITY CHANGES



## INCREASED THE NEED FOR CLOUD SOLUTIONS



**72%**  
Physical security technology priorities have changed since the pandemic

**60%**  
See the need for immediate upgrade to cloud technology or are considering it

It's not just cloud migration that has changed as a result of the pandemic. Security and facility managers are focused on different types of technology solutions to reopen facilities. Of the respondents, 72% said that their technology priorities have changed, with 26% indicating that it is imperative for them to have technology to enforce contact tracing, social distancing, and healthy building standard compliance requirements. Brivo expects this trend to continue into 2021 as more organizations prepare to bring employees, customers, and students back to work and school.

## TACKLING CHALLENGES AS WE REOPEN

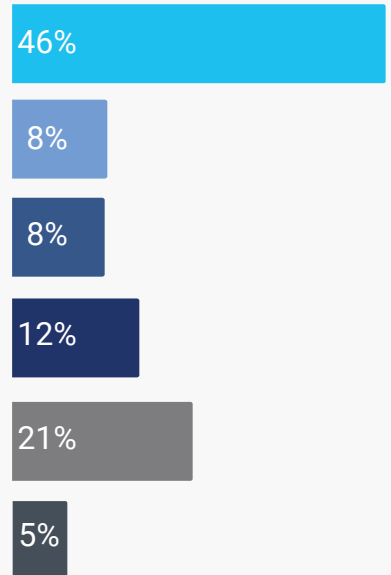
Our research shows that there are several new and repeat challenges for security professionals as they look ahead to getting operations back to normal. Executive buy-in on security priorities is still a challenge for security professionals looking to upgrade their technology stack to meet new and recurring security issues. Our survey respondents said that the lack of budget and lack of alignment between departments were their largest barriers to adopting new security technology.

This highlights the need to show executive management the value of modernizing security in business terms to gain buy-in, as well as improving their physical security posture. Part of these modernization strategies should look to cloud security solutions that can demonstrate clear ROI for executive management over legacy server solutions when looking at the total cost of ownership.

New to our survey this year was the introduction of staffing challenges. This is likely a combination of several factors, including COVID-related staffing issues and the need to facilitate remote security operations for staffers. To ease these challenges, security and facility management professionals should consider solutions that enable them to monitor and respond to security alerts from anywhere.

The need for remote access was highlighted by survey respondents. In fact, nearly 30% of respondents said that they do not have centralized security solutions and struggled during the 2020 pandemic to manage day-to-day operations. Even as businesses reopen their doors, the need for remote management will not go away. We expect that remote work will become part of the normal working relationship across most sectors of the economy that have seen benefits from having a generally remote workforce.

### MAJOR BARRIER TO ADOPT NEW PHYSICAL SECURITY TECHNOLOGY



- Lack of budget
- We do not think there will be an ROI
- No executive sponsorship
- Lack of understanding of currently available solutions
- Lack of alignment between security and other departments
- Other

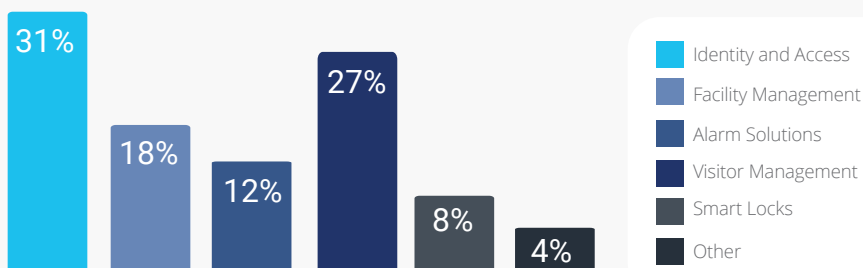
# TECHNOLOGY INTEGRATIONS ARE A KEY FOCUS AREA FOR 2021

Our research also showed that the top physical security technology goal for 2021 was better integration between security and other systems. Over 60% agreed that integration was the most important goal for them in 2021. This result highlights the fact that security operations need to be more centralized and efficient to manage.

There may be many elements that plug into maintaining the overall security posture of a facility. Open security platforms with a large ecosystem of integrations across physical access, surveillance, identity management, various hardware and software providers, and business systems can provide the best value for security and facility managers. Open security platforms also allow for a singular view of what is going on across the entire property, portfolio or organization.

**30%**  
Struggled during the 2020 pandemic to manage day-to-day operations

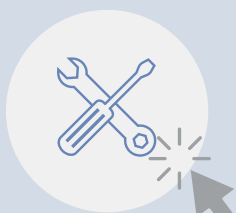
CUSTOMERS' TOP PRIORITIES FOR INTEGRATION WITH PHYSICAL ACCESS CONTROL SOLUTIONS



Brivo can help you gain executive buy-in:



Total Cost of Ownership



Toolkit for Gaining Executive Buy-in

# CLOUD ADOPTION ACCELERATES PATH FORWARD

Cloud continues to be a top trending topic among security and facility management professionals. One byproduct of the pandemic is the rapid acceleration of cloud adoption across the Proptech stack. We asked our respondents to tell us which benefits of cloud access control technology are most important to them. The overwhelming top two responses were increased convenience and cost savings.

From a cost savings perspective, this isn't new. We know from the results of our research that security and facility managers struggle to garner incremental budgets for physical security—even though there is a critical need to modernize. So many are looking at ways to do more with the budget they have. Transitioning to cloud solutions enables them to modernize to today's standards, while also cutting costs associated with legacy systems. These technology updates have demonstrable year-over-year cost savings for organizations.

Costs, however, aren't the only element to consider. Organizations have a greater need for real-time access to data to make decisions. Data must be accessible from anywhere, reliably. Cloud enables you to do just that to support operational needs. Furthermore, the continuous enhancements and cyber security updates inherent in cloud solutions are a vast improvement from massive software updates on servers. Cloud technology helps you innovate faster and stay ahead of cyber threats.

Convenience for administrators and users was named the most important feature of cloud access control tech in our survey. This continues to be a shift in how users' expectations have changed. We continue to become more reliant on cloud and mobile technology to simplify experiences in both our personal and professional lives. Analog approaches to the day-to-day interactions are no longer acceptable for the average employee, resident, or student that flow through our facilities each day. Enabling more convenient—and secure—access can alleviate user friction and increase productivity. It can also be a competitive advantage for property owners as they seek to attract and retain tenants.

## WHAT DO YOU FEEL IS THE MOST IMPORTANT BENEFIT OF CLOUD-BASED ACCESS CONTROL TECHNOLOGY?

33%

31%

15%

14%

4%

3%

- Increase convenience for you and your end users
- Cost savings from reduced need for manual IT updates
- Platform scalability
- Increased and improved security
- Contact tracing and social distancing measures
- Other

# DATA ANALYTICS TO HELP NAVIGATE THE NEXT ERA

A growing focus for security and property managers is data analytics. The right analytics can be instrumental in making better, more informed decisions around access control and overall property operations. In fact, 41% of our respondents said that physical security data helps them improve physical security policies and procedures based on data insights. Security leaders are also interested in being able to correlate suspicious activity across the property over time through data analytics in order to identify and resolve threats.

Organizations are also turning to analytics to help them with compliance and to better understand access and usage trends. Understanding these trends helps property managers make decisions about asset utilization and take action on HVAC or utility usage when the building is unoccupied, which helps reduce operational costs.

Data analytics represents a huge opportunity for property and physical security to optimize operations. However, within the facility management industry, most organizations are just starting to scratch the surface of data utilization in their properties and portfolios. Still, many organizations face the challenge of understanding what they can do with the data to make it actionable. This challenge was very apparent in the results of our survey; 70% of respondents say they have problems with data—ranging from having too little, too much, or insignificant data.

So what should security and facility managers do to start to harness the power of data in their organizations? Start by understanding the problems that you are trying to solve and then look at the data to solve it. Organizations often start with a bucket of data and try to find a problem. Instead, focus on key metrics that are necessary to inform business operations and security procedures, and find the right technologies to provide you the data for those metrics. The Brivo Access platform released in late 2020, provides organizations the best visibility into access, event, alert and video data in one place. This data platform allows organizations to see what's happening across their properties and utilize their own data to simplify operations based on their needs.

## MOST BENEFICIAL PHYSICAL SECURITY DATA USAGE FOR YOUR BUSINESS

18%

12%

21%

7%

41%

- Support policy compliance
- Figure out access and use trends
- Investigate suspicious behavior patterns
- Improve contact tracing and health safety compliance
- Improve my physical security policies/procedures based on analytics

## A BRIGHTER ROAD AHEAD WITH BRIVO

Our research this year highlights both new and sustained trends that security and facility management professionals face as we plan for reopening facilities beyond essential staff in 2021. A common theme was a need to simplify operations through technology.

Brivo provides solutions that support organizations as they migrate from costly legacy on-prem systems to modern cloud security. Brivo is the first cloud access control provider, the first to offer mobile credentials, the first to combine smart apartment technology with common area security for multifamily buildings, and the first to utilize artificial intelligence to surface actionable data for security and facility managers. As organizations accelerate their adoption of cloud technologies, it's important to look for a solution that will deliver, but also a partner that is proven, trusted, and a leader in the industry.

Brivo is uniquely positioned to solve security and facility managers' challenges. Our ecosystem of integration partners allows organizations to have a complete view of what is happening across their property and their real estate portfolio. Our data visualization tools help security and facility managers sort through the complexities of too much data and surface actionable insights that they can use to make more effective decisions.



## About Brivo

Brivo is the global leader in mobile, cloud-based access control for commercial real estate, multifamily residential, and large distributed enterprises. Our comprehensive product ecosystem and open API provide businesses with powerful digital tools to increase security automation, elevate employee and tenant experience, and improve the safety of all people and assets in the built environment. Having created the category over twenty years ago, our building access platform is now the digital foundation for the largest collection of customer facilities in the world, trusted by more than 25 million users occupying over 300M square feet of secured space in 42 countries.

Our dedication to simply better security means providing the best technology and support to property owners, managers, and tenants as they look for more from buildings where they live, work, and play. Our comprehensive product suite includes access control, smart readers, touchless mobile credentials, visitor management, occupancy monitoring, health and safety features, and integrated video surveillance, smart locks, and intercoms. Valued for its simple installation, high-reliability backbone, and rich API partner network, Brivo also has the longest track record of cybersecurity audits and privacy protections in the industry.

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