

STATE OF PHYSICAL SECURITY 2020 HALFTIME REPORT




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For four years, Brivo has conducted a benchmarking survey to assess the state of the physical security industry from security and facility professionals. We uncover your biggest challenges, goals for the future and technology needs.

The survey results are enlightening and guide Brivo to provide the most value to our customers on their mission to keep facilities and people safe.

This year has been unlike any other. The impact of COVID-19 on the physical security industry can't be denied. We decided to do a mid-year check-in to understand major differences in the responses from the end of 2019 versus now.

We surveyed 159 security professionals in August 2020 and compared these findings to those of the same survey we conducted in December 2019 to find out how needs have changed this year.



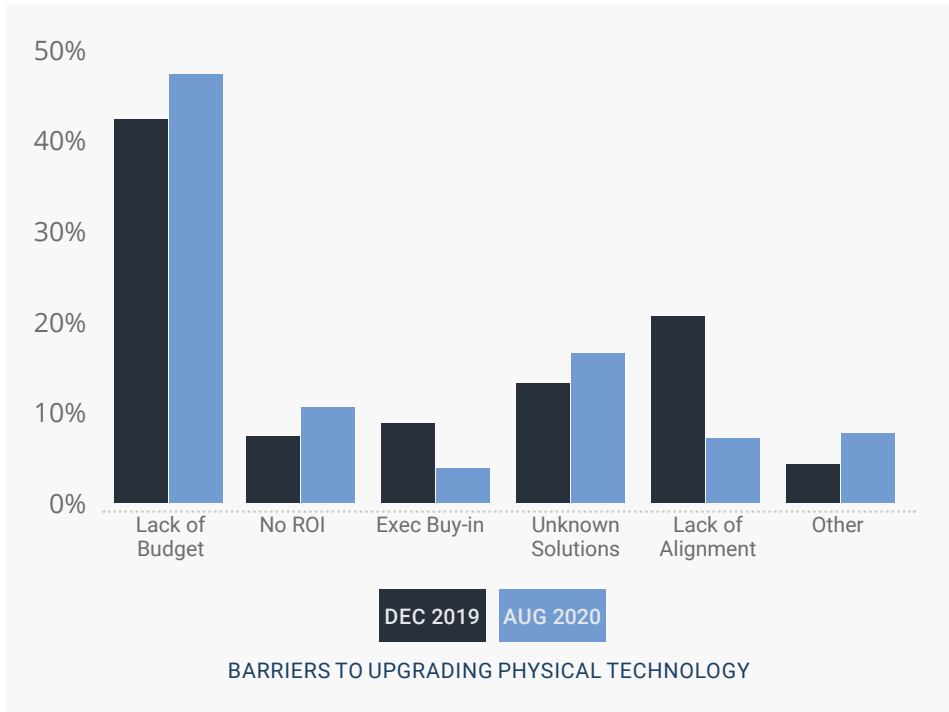
The big question we wanted to answer was: what has been critical to security professionals since COVID-19 reared its ugly head?

CHALLENGES

Loss-prevention has replaced executive buy-in in the top three challenges. At the end of 2019, the top three challenges for security professionals were security breaches, compliance and executive buy-in. At our half-time check-in, security breaches and compliance still rank first and second, but now loss prevention has taken third place replacing executive buy-in.

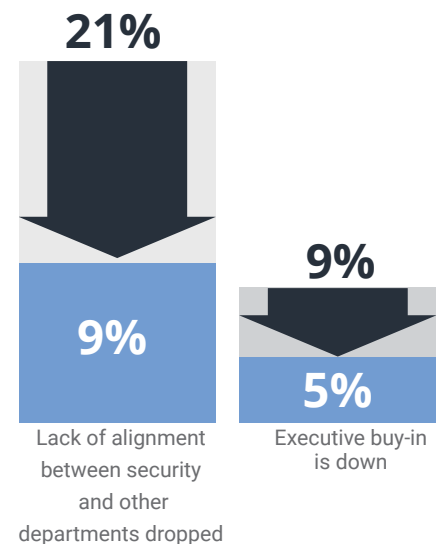
Top 3 challenges

1. Security Breaches
2. Compliance
3. Loss Prevention



We see the theme of the lessened issue of executive buy-in continue into our next question: What is the major barrier to the adoption of new physical security technology? Executive buy-in is fading away as a challenge to security professionals regarding the barriers to upgrading physical security technology. Is this because employees are coming together to increase efficiency to survive the pandemic? Lack of budget, as predicted, remains the number one barrier and has only increased.

We can attribute these new statistics to some harsh realities organizations are now facing around integrated functions and efficiency. A recent Forbes [article](#) points out, "Thomas Vollman's 1996 book, The Transformation Imperative, focused on how highly integrated corporations can adapt to weather not just competitive challenges, but also unexpected market changes like what we are experiencing now. Companies either gain competitive advantage, or they are victims of competitive parity." The pandemic and subsequent quarantine have illuminated every little



inefficiency caused by outdated or incompatible systems. Inefficiencies that are harder to weather given the economic repercussions of the pandemic. This has served to bring teams together to align on priorities and become as efficient as possible. The C-suite most likely directed this alignment. This accounts for the major drops in percentages for lack of alignment and executive buy-in as barriers to upgrading technology.

Not surprisingly, lack of budget remains the number one barrier and has only increased. Organizations realize the need for integrated and efficient systems, but their budgets are tighter than ever.

The Budget Solution

Lack of budget remains the number one barrier to the adoption of new physical security technology. For this reason, Brivo has introduced multiple buying options to make it easier to purchase cloud-based access control that can become part of an integrated system to drive efficiency.

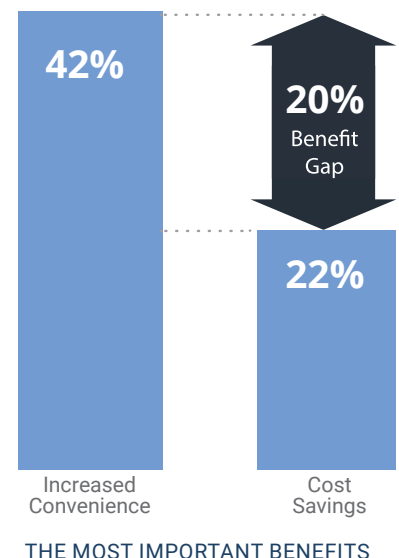
[See Buying Options](#)

BENEFITS

The survey conducted at the end of 2019 revealed that 2020 'cost savings' and 'increased convenience' were the two most important benefits and they were equally important - only a fraction of a percentage separated those two benefits.

There is now a 20% gap between those benefits: 42% of August 2020 respondents think 'increased convenience' is the most important benefit and only 22% considered 'cost savings' the most important benefit.

The pandemic forced new normals on us like remote work, which lead to empty and vulnerable buildings, and new social distancing standards as people return to their offices. The inability to work on-site has uncovered the pitfalls of some of the outdated on-premise systems our respondents are tied to. Security professionals must maintain control and be able to monitor their facilities even if they can't be onsite, especially if the buildings are empty and therefore more vulnerable to break in. As we return to offices, they must be able to manage where people are in the buildings to maintain social distancing standards and protocol. In short, security professionals have much more on their plate than ever before. What we can take away from this statistic is that the most important ROI right now is of a security professional's time and efficiency as well as increased security.

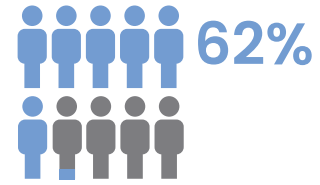


DATA

The majority of security professionals are unsatisfied with the data they get from their physical security solutions. 62% of security professionals still get too much data, too little data, or don't know how to use their data to glean insights for informed decisions.

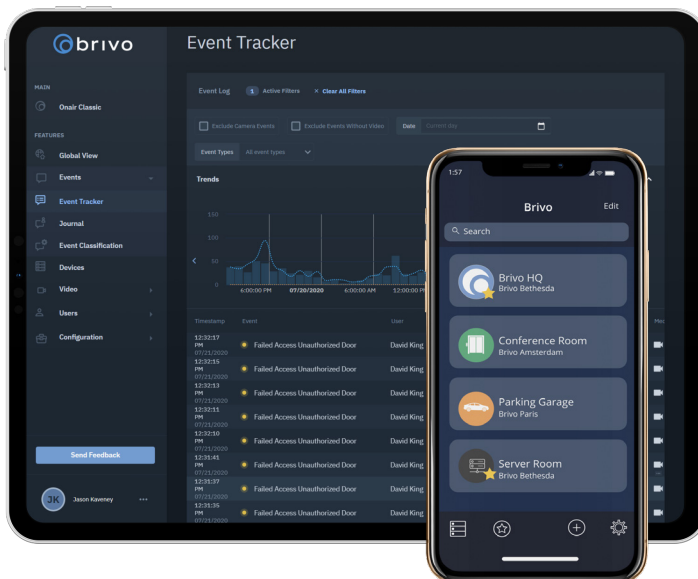
Physical security data has never been more critical than right now. Security professionals are using data for [contact reporting](#) in case of infection and improving visitor management and reporting. These are key functions of security data that can keep your facilities compliant and keep everyone healthy.

Improving physical security policies and procedures based on analytics and investigating suspicious behavior patterns remained the top two most beneficial uses of physical security data for respondents. The right data, visualized so you can easily see trends and patterns, can transform your building security and increase operational efficiency.



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MAKE DATA WORK FOR YOU. OUR ACTIONABLE DATA IMPROVES YOUR SECURITY

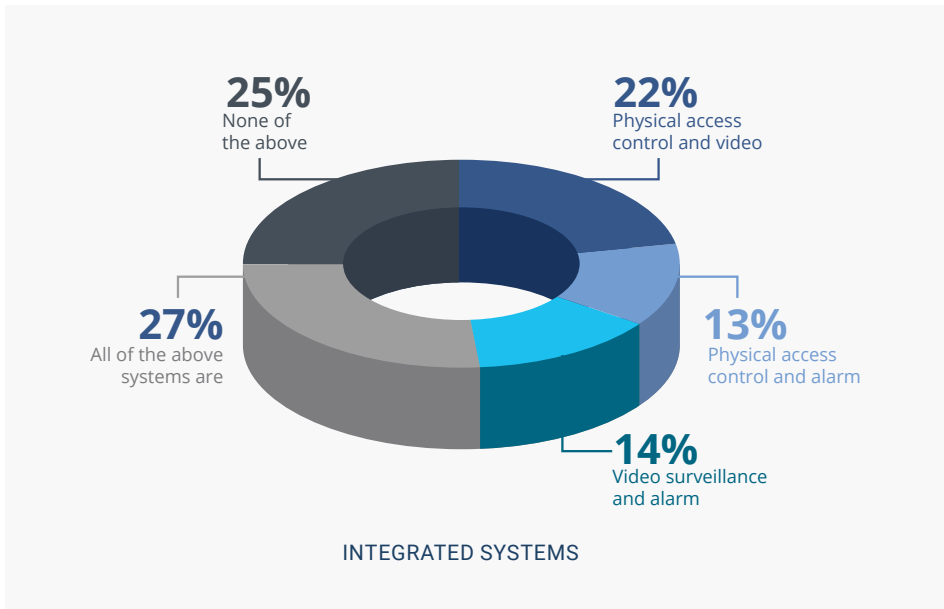


Brivo is working to remedy the major data problem for security professionals with a new and improved data platform that allows you to:

- Gain real-time access to data so you always know what is happening at your business
- Understand access behavior and spot any potential threats that you need to prevent

INTEGRATIONS

The numbers pertaining to integrated security systems from the end of 2019 to August 2020 didn't change much. The 2020 survey showed that a quarter of respondents do not have any integrated security technology. Only 27% of respondents said that their access control, video surveillance and alarm management were all integrated and accessible via one interface.



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This is important to note because, in our new climate, efficiency is everything. According to [Information Week](#), 74% of CIOs are prioritizing initiatives that drive operational efficiency. Disparate systems can create headaches or make it easy to miss critical information. In order to drive operational efficiency, systems and data need to be integrated to eliminate information silos and encourage comprehensive views of the business.

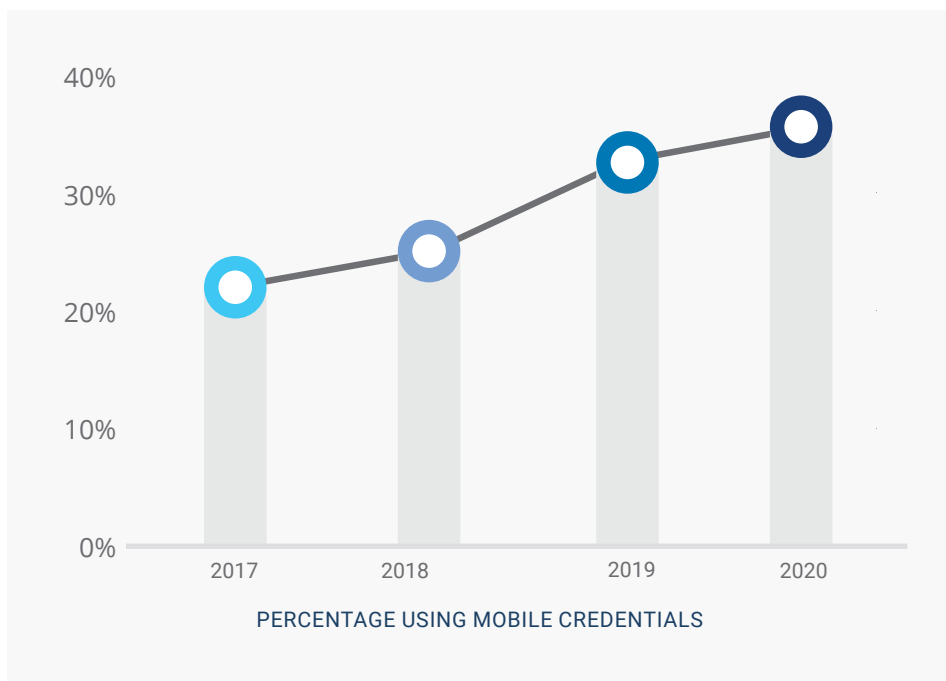
It does look like companies are beginning to realize this, because 51% of the August 2020 respondents did say that an integrated physical security solution is in their technology roadmap. However, the other half of respondents either say an integrated physical security solution is not a priority or don't know if it is moving forward.

MOBILE

One of the largest differences between the end of 2019 and August 2020 is how reliant respondents are on mobile applications for work.

Mobile application and credential use is growing quickly. Our August halftime check-in survey revealed that 85% of respondents use work-related mobile applications. At the end of 2019 that number was only 73%. That is a 12% jump in 8 months. This likely reflects the dramatic change to work-from-home. Without mobile applications and the ability to manage systems and people remotely, security professionals are not able to do their jobs from home. Those that had mobile and cloud-based physical security systems in place before quarantine were able to continue their jobs with little to no upset to continuity. Those that managed their facilities with on-premise systems were at a major disadvantage.

Are you currently using mobile credentials to access your facility?



The use of mobile applications increased by 12% in 8 months. The use of mobile credentials increased by 5% in the same timeframe.

We've been conducting this survey since 2017, and the mobile credential numbers have continued to increase steadily year over year. In three years, the percentage of respondents who use mobile credentials in their facilities has almost doubled from 22% to 38% which shows the popularity and necessity of mobile credentials.

We expect these numbers to continue to increase in the post-COVID environment. Mobile credentials can play an essential role as we return to work as a gatekeeper through new personnel control for social distancing and employee self-screening procedures.

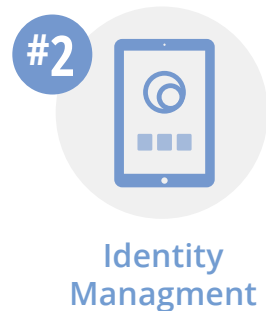
KEY FEATURES

There has been a huge growth in the need for facility management integration and identity management

We asked: If only one of the following systems could be integrated with your physical control solution, which one would you choose? We saw a big change in the answers from the end of 2019 to now. Facility management application integration is up from 10% to 30% as the most important integration. Coming in second is identity management at 27%. That wasn't one of the top two in the 2019 survey. Integrations with facility management applications likely grew in popularity due to remote work. If all aspects of your facility can be controlled remotely from one interface, then there is no need to be on-premise during quarantine. As for the increase in the identity management integration popularity, the importance of contact reporting and the need for increased efficiency and security likely spurred that on.

The most important feature associated with cloud-based access control from the August 2020 half-time survey is the ability to manage access and open doors without having to be onsite. That feature jumped from 17% in 2019 to 29% in August of 2020. This is due to increased work-from-home protocols and quarantine measures. At the end of 2019, the top feature was: assigning and revoking credentials or temporary passes in seconds, which now comes in second at 24%.

Most important integrations



THE BIG QUESTION

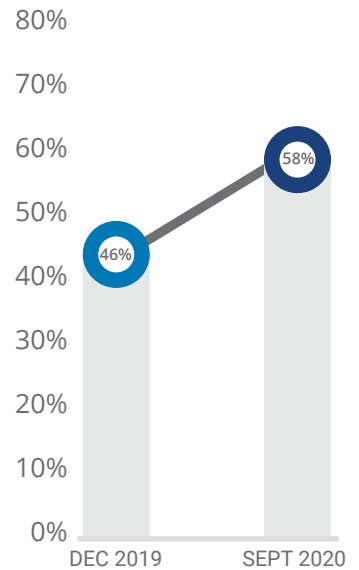
The survey is designed to illuminate new goals, challenges and trends in the physical security industry. But in the end, the question that matters most is: Do you think having cloud-based access control would improve your overall security?

58%, the majority of security professionals, agree that cloud-based access control does improve overall security. That percentage is up 12% from the end of 2019. Maybe it took an upending event like what we've just experienced to highlight the importance of the cloud in physical security.

What has been critical to security professionals since COVID-19 reared its ugly head? The big question we wanted to answer was:

- Having remote facility control and monitoring
- Integrating access control with facility management and identity management
- Using data to analyse patterns and behavior
- Improving organizational security and efficiency

It is abundantly clear that on-premise technology cannot satisfy all these crucial needs. The world has changed. Businesses and the way we interact with facilities have fundamentally changed. The technology we use to manage those facilities must accommodate our new normal. It must integrate with other systems for better data and organizational alignment and efficiency. It must be flexible and mobile. It must be easy to operate and generate custom and insightful data. The right cloud-based access control solution can be the basis for an integrated security ecosystem.



THE IMPORTANCE OF THE CLOUD
IN PHYSICAL SECURITY

Learn more about creating an integrated security ecosystem to drive operational efficiency [here](#).

talk to an expert

