**Security Systems and Products 2022**

**Security Experts’ Industry Perspectives**

The security experts interviewed for *Security Sales & Integration*’s January 2022 Special Report noted many opportunities in the industry, from more emphasis on services than hardware to the use of artificial intelligence to business needs in the hybrid workplace.

These experts expect the industry to face continuing challenges from consumer DIY security products, the upgrading of companies’ IT infrastructures to combat sophisticated cybercrimes and 2022 project delays because of supply-chain issues.

As home networks proliferate and become more integrated, security companies are expanding their services to include network design and installation, which can lead to larger and more profitable service contracts.

**Factors Inhibiting Security System Sales, Q3 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Factor | Percent | Factor | Percent |
| #1: DIY security systems competition | * 39% | * #5: Consumers hesitant to have technicians in their homes | * 5% |
| #2: Supply-chain disruption | * 22% | * #6: Inadequate training for new hires | * 3% |
| #3: Unable to hire needed employees | * 18% | * #7: Unfair competition | * 4% |
| #4: Constrained consumer spending | * 7% | * #8: Available financing | * 1% |

*Security Sales & Integration*, November 2021

**Home Security Habits and Preferences**

According to a recent survey from Consumer Affairs, respondents who had recently purchased a home security system spent an average of $1,233. A doorbell camera was the most recent security purchase of these respondents at 29%.

Of the survey respondents, 48% said they were motivated to buy a home security system because of crime content on social media, followed by high local crime rates at 46%, stolen packages at 33%, a previous break-in at 31% and property vandalism at 30%.

The survey respondents’ top five brands for feeling safe in their homes were Ring, ADT/Blue, Abode, Brinks Home and Scout Alarm. 69% of them said they activate their alarm systems anytime they leave home.

**Home Security Features and Actions Consumers Take to Feel Secure, 2022**

|  |  |  |  |
| --- | --- | --- | --- |
| Feature/Action | Percent | Feature/Action | Percent |
| #1: Ensure doors are locked at night | * 43% | * #6: Deadbolt | * 32% |
| #2: Ensure windows are closed and locked at night | * 42% | * #7: Motion-activated lights | * 31% |
| #3: Dog | * 41% | * #8: Motion detectors | * 31% |
| #4: Self-monitoring security cameras | * 40% | * #9: Security sticker or sign | * 29% |
| #5: System with integrated alarm | * 39% | * #10: Firearm | * 28% |

Consumer Affairs, March 2022

**Physical Security Is a Major Business Concern**

Results from Pro-Vigil’s report, The State of Physical Security Entering 2022, revealed 28% of surveyed businesses had more physical security incidents during 2021 than 2020 (20%) and 27% expected those incidents would increase during 2022.

Of those surveyed, most of them (38.71%) said supply-chain issues were the #1 factor causing more physical security incidents, followed by reduced business hours at 22.58% and security guard shortages at 9.68%. Another 22.58% didn’t know why.

According to System Surveyor’s 2022 Physical Security Benchmark Report, 34% of systems integrators/companies said the top challenge to bid on new projects was “gathering accurate customer site information.”

**What Steps Businesses Took to Upgrade Their**

**Security During 2021, November–December 2021**

|  |  |
| --- | --- |
| Upgrade | Percent |
| No upgrade; strategy hasn’t changed | * 56.60% |
| Installed security cameras | * 29.25% |
| Installed alarm system | * 15.09% |
| Added security guards | * 6.60% |
| Other | * 7.55% |

Pro-Vigil, February 2022

**Cybersecurity Insights**

*Security Sales & Integration*’s 2022 Cybersecurity Deep Dive report, compared to its 2018 report, strongly indicates increased cybersecurity threats. 78% of surveyed security integrators/companies said they were aware of customer breaches, more than twice 2018.

Security integrators/companies also said their customers have significantly shifted their priority from physical security (51% in the 2018 survey to 30% in the 2022 survey) to cybersecurity (from 13% to 59%, respectively).

The survey also found customers’ video surveillance (on-premise, via the cloud, hybrid or wireless devices) was rated either with extreme or high cybersecurity vulnerability, at 60%, 65%, 63% and 67%, respectively.

**Top 10 Security Markets With Highest Cybersecurity Vulnerability\*, 2022**

|  |  |  |  |
| --- | --- | --- | --- |
| Feature/Action | Percent | Feature/Action | Percent |
| #1: Financial institutions | * 80% | * #6: Commerical offices | * 65% |
| #2: Government | * 78% | * #7: Small to midsize businesses | * 63% |
| #3: Healthcare | * 74% | * #8: Higher education | * 60% |
| #4: Critical infrastructure | * 71% | * #9: Sports/Events/Entertainment | * 60% |
| #5: Industrial facilities/warehouses | * 71% | * #10: Elderly homes/facilities | * 59% |

*Security Sales & Integration*, April 2022 issue \*total of “extreme” and “high” vulnerability

**Home Improvements: Security Systems**

The Media Audit’s 2021 Aggregate Report of 49 consumer/market surveys shows Gen Zers and Millennials over-indexed the most among five generational groups for planning an alarm or security services for their home during the next 12 months, at 160 and 148, respectively.

Adults 18+ with household incomes of $100,000–$149,999 and $150,000 or more over-indexed the most for planning an alarm or security services at 117 and 124, respectively.

African Americans at 137 and Latinx Americans at 145 were the only two ethnic groups that over-indexed. Caucasian Americans at 84 and Asian Americans at 94 under-indexed.

**Indices of US Adults Who Planned an Alarm or Security Services Home Improvement\*, by Generation and Their Home Value, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Home Value | Gen Z | Millennials | Gen X | Baby Boomers | Silent Generation |
| $100,000–$199,999 | * 48 | * 85 | * 106 | * 124 | 133 |
| $200,000–$299,999 | * 40 | * 77 | * 112 | * 129 | * 131 |
| $300,000–$399,999 | * 32 | * 79 | * 110 | * 130 | * 148 |
| $400,000–$499,999 | * 31 | * 80 | * 118 | * 127 | * 125 |
| $500,000–$999,999 | * 24 | * 68 | * 115 | * 137 | * 160 |
| $1 million or more | * 71 | * 75 | * 109 | * 128 | * 106 |

Based on The Media Audit’s 49-Market 2021 Aggregate Survey \*during the next 12 months

**Media Habits of Adults 18+ Planning a Security Services Home Improvement**

The Media Audit’s Aggregate Report also shows adults 18+ planning an alarm or security services over-indexed for heavy exposure to six of seven media: radio at 157, newspaper at 200, outdoor at 125, direct mail at 151, the Internet at 111 and social media at 150.

By generation, Gen Zers over-indexed the most for heavy exposure to social media while Millennials over-indexed for the same six media as above. Unsurprisingly, Baby Boomers and members of the Silent Generation only over-indexed for heavy exposure to TV.

(See definitions of heavy exposure to media on page 4.)

**Indices of US Adults Who Planned an Alarm or Security Services Home Improvement\*, by Generation and Logging onto Social Media†, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Social Media | Gen Z | Millennials | Gen X | Baby Boomers | Silent Generation |
| YouTube | * 93 | * 101 | * 107 | * 100 | 75 |
| Facebook | * 82 | * 101 | * 110 | * 107 | * 86 |
| LinkedIn | * 81 | * 110 | * 115 | * 71 | * 39 |
| Twitter | * 108 | * 104 | * 109 | * 68 | * 14 |
| Pinterest | * 85 | * 110 | * 112 | * 72 | * 40 |
| Instagram | * 107 | * 107 | * 110 | * 52 | * 43 |
| Snapchat | * 134 | * 113 | * 95 | * 28 | * 2 |
| TikTok | * 122 | * 112 | * 103 | * 32 | * 2 |

Based on The Media Audit’s 49-Market 2021 Aggregate Survey

\*during the next 12 months †logged on during the past month

**More Valuable Insights**

According to 2022 research from Parks Associates, the installation of DIY security systems by homeowners has been a competitive challenge for many local security system companies. Of those consumers surveyed, 42% said they installed a system themselves. Almost half (49%) of those DIY installations were the result of a home burglary while approximately half (27%) had a system installed by professionals.

Professionally-installed home security systems have increased since Q2 2020 during the initial wave of the pandemic as many homeowners did not want any such vendors entering their homes at the time. Whether these systems are self-installed or professionally installed, 90% of homeowners still want professional monitoring of their systems.

**Percentage of Security Dealers Selling Selected Services, 2018–2021**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Service | 2018 | 2019 | 2020 | 2021 |
| Video verification | * 42% | * 56% | * 52% | 71% |
| Home network, cybersecurity | * 39% | * 56% | * 59% | * 60% |
| Personal emergency response systems | * 37% | * 51% | * 60% | * 56% |
| Aging-in-place/independent living | * 21% | * 44% | * 46% | * 55% |
| Vehicle alarm monitoring | * 8% | * 40% | * 23% | * 41% |

*Security Sales & Integration*, November 2021 (color represents change from the previous year)

**The Media Audit: Heavy Exposure to Media, 2021**

|  |  |
| --- | --- |
| Media | Time |
| Radio | 180+ minutes during an average day |
| TV | 300+ minutes during an average day |
| Newspaper | 60+ minutes during an average day |
| Outdoor | 200+ miles during an average week |
| Direct mail | 75+ read weekly |
| Internet | 180+ minutes during a typical day |
| Social media | 180+ minutes during a typical day |
| Audio streaming | 180+ minutes during an average day |
| Podcast listening | 180+ minutes during a typical day |
| Video streaming | 180+ minutes during an average day |

*Sources:* *Security Sales & Integration* Website, 5/22; Consumer Affairs Website, 5/22; Pro-Vigil Website, 5/22; System Surveyor Website, 5/22; The Media Audit Website, 5/22.

*Updated*: May 2022

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**Local Market and Station Information**