

The 2015 Vanderbilt European Security Barometer

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I am pleased to introduce the 2015 Vanderbilt European Security Barometer, which tests the climate of the electronic security market in Europe.

The results provide valuable insight into consumer and business attitudes towards security, and reveal the efforts they make to keep their homes and businesses safe from harm. We also gained an indication of where electronic security technology itself could be heading by questioning consumers and businesses on the solutions that they are interested in for the future.

The research was amongst more than 7,500 consumers and businesses in Great Britain, France, Germany, Spain and Sweden. The survey builds on research that Security Products from Siemens itself undertook a few years back. Vanderbilt having acquired Security Products from Siemens in June 2015, we hope to repeat the survey in the future with the view that the barometer becomes a regular event and allows us to track trends in the industry.

Joe Grillo
Managing Director
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Wiesbaden, Germany
May 2015

Research areas

Consumers were asked a series of questions about the risk that society faces; the role and acceptability of CCTV; the type of electronic security products they have in their own homes; and the products they would like to see in their homes in the future.

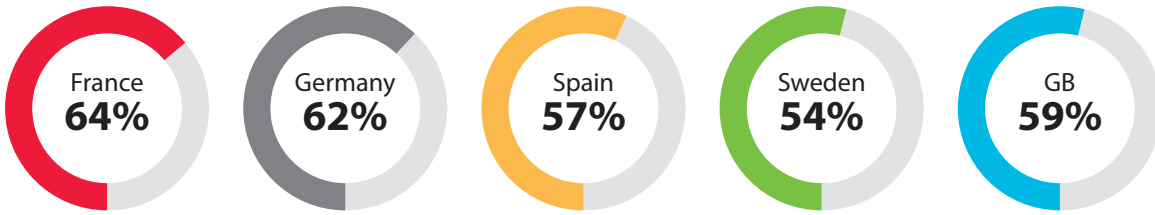
Businesses were asked about the number and type of security breaches at their premises and they were also questioned about the types of threat for which they require protection. Respondents were surveyed on the type of electronic security products installed in their workplace, and were questioned about how buying decisions are made.

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Themes



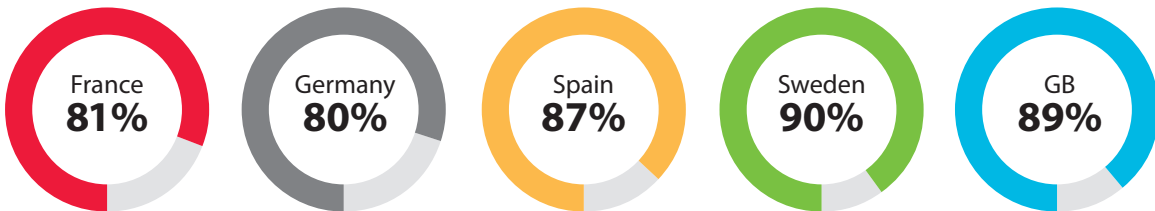
1 People believe that society is now more at risk from terrorist threat, crime and violence:



A majority of people in France, Germany, Spain, Sweden and Great Britain believe their society is more at risk from terrorist threats, crime and violence than a year ago.

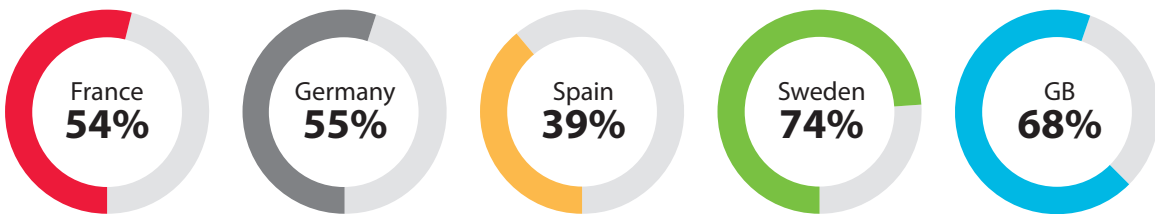
Average across all 5 countries: **59%**

2 CCTV has widespread public support – even amongst those that worry about civil liberties:



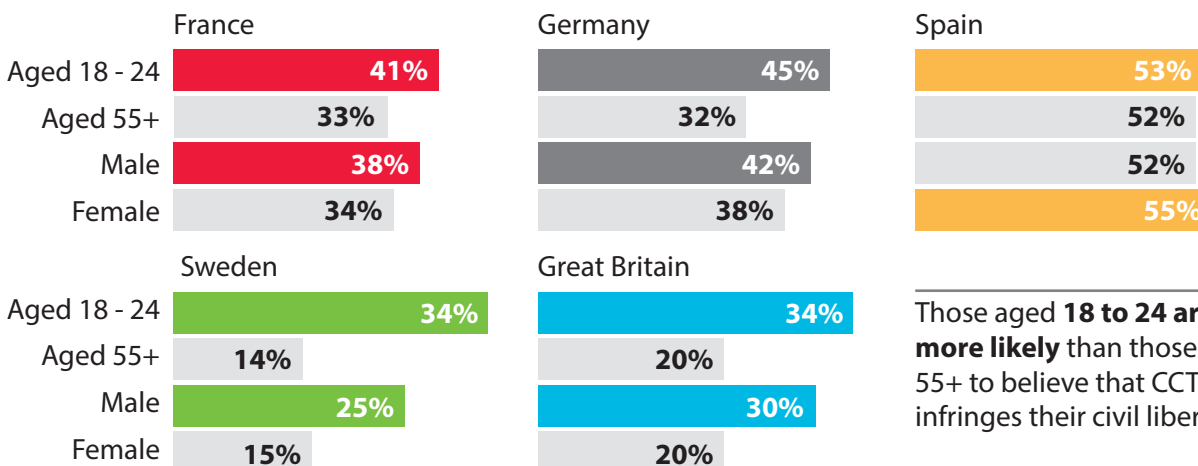
There is overwhelming support for the use of CCTV in reducing crime and providing evidence to the Police - even from those that are more inclined to believe that CCTV infringes civil liberties.

Average across all 5 countries: **85%**



Across France, Germany, Spain, Sweden and Great Britain, the majority of people do not believe that CCTV infringes civil liberties.

Average across all 5 countries: **58%**



Those aged 18 to 24 are more likely than those aged 55+ to believe that CCTV infringes their civil liberties.



3 Only a minority of homes are protected by electronic security equipment:

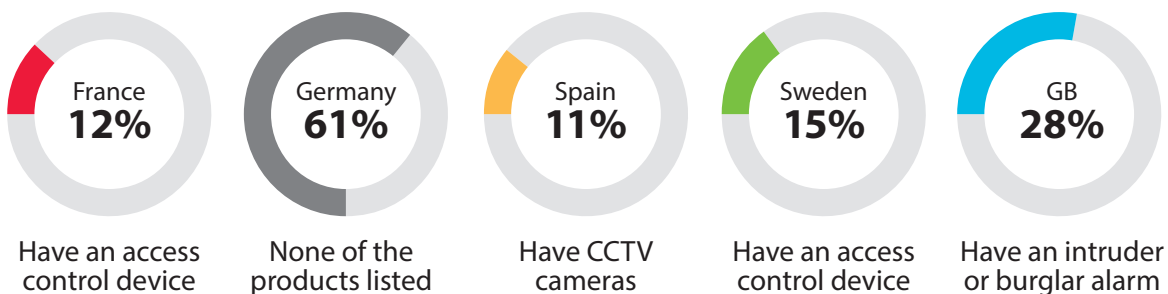


Across all five countries surveyed, **only a minority of households** have an intruder or burglar alarm, access control or CCTV.

In fact, few households reported having electronic **security products installed** in their homes:

	France	Germany	Spain	Sweden	GB
None of these	46%	61%	51%	43%	17%
Intruder or burglar alarm	12%	9%	19%	20%	28%
Access control device	12%	5%	9%	15%	5%
CCTV camera(s)	7%	7%	11%	8%	7%
Remote monitoring	7%	3%	6%	10%	3%
Camera system viewable via mobile device e.g. smartphone or tablet	5%	5%	8%	5%	3%

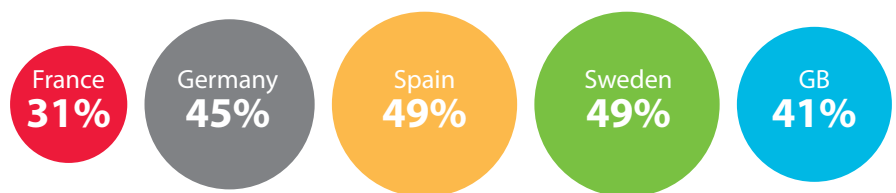
There were **differences in adoption** of electronic security products between the countries surveyed:



4 There is a real appetite for advanced electronic security solutions in the home:

Households are interested in installing security systems in their homes in the future – whether integrated CCTV, access control and intruder alarms, or systems that monitor their homes and alert them if movement is detected. They are also interested in security systems that connect to other household devices.

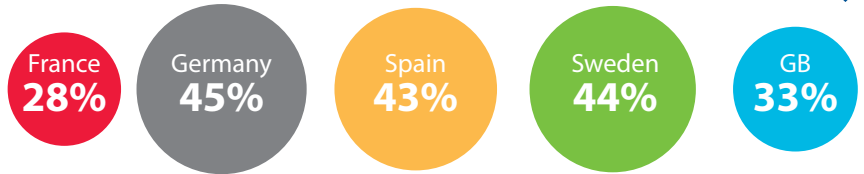
a) Those interested in the **ability to view live images** of their home-captured on CCTV cameras and automatically recorded when movement is detected.



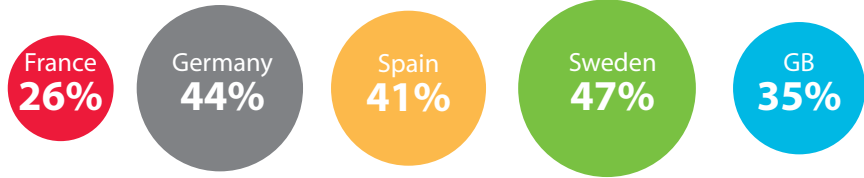
Themes



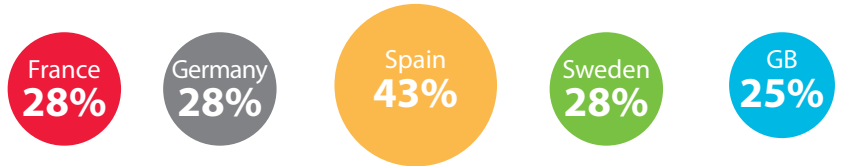
b) Those interested in a central system that combines security products (e.g. burglar alarm, access control and CCTV) to provide an overall view / control of their home security.



c) Those interested in a security system that connects to and controls other products in their home (e.g. allows them to turn lights on and off, raise or lower their home's temperature, switch on home appliances, etc.)

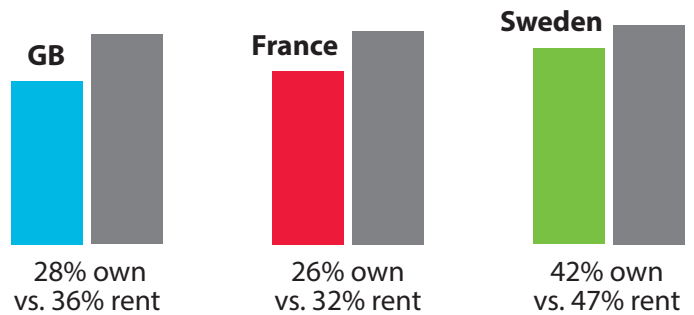


d) Those interested in the ability to lock and unlock the doors to their home remotely from a smartphone, tablet or PC desktop.



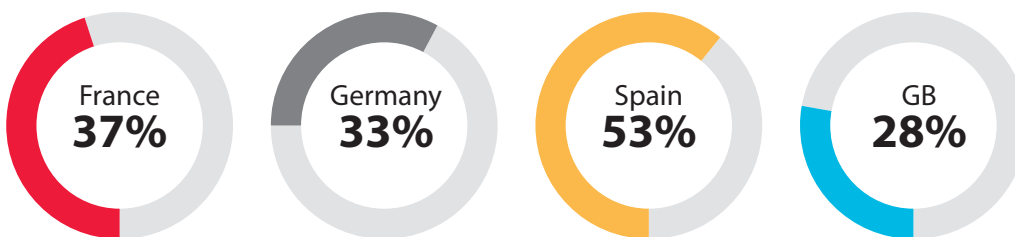
Consumer interest in **future security technologies** was not restricted to those who own their own home.

In Great Britain 28% of those who own their home outright were **interested in an integrated security system**, yet a higher number (36%) of those who rent from a private landlord were also interested.



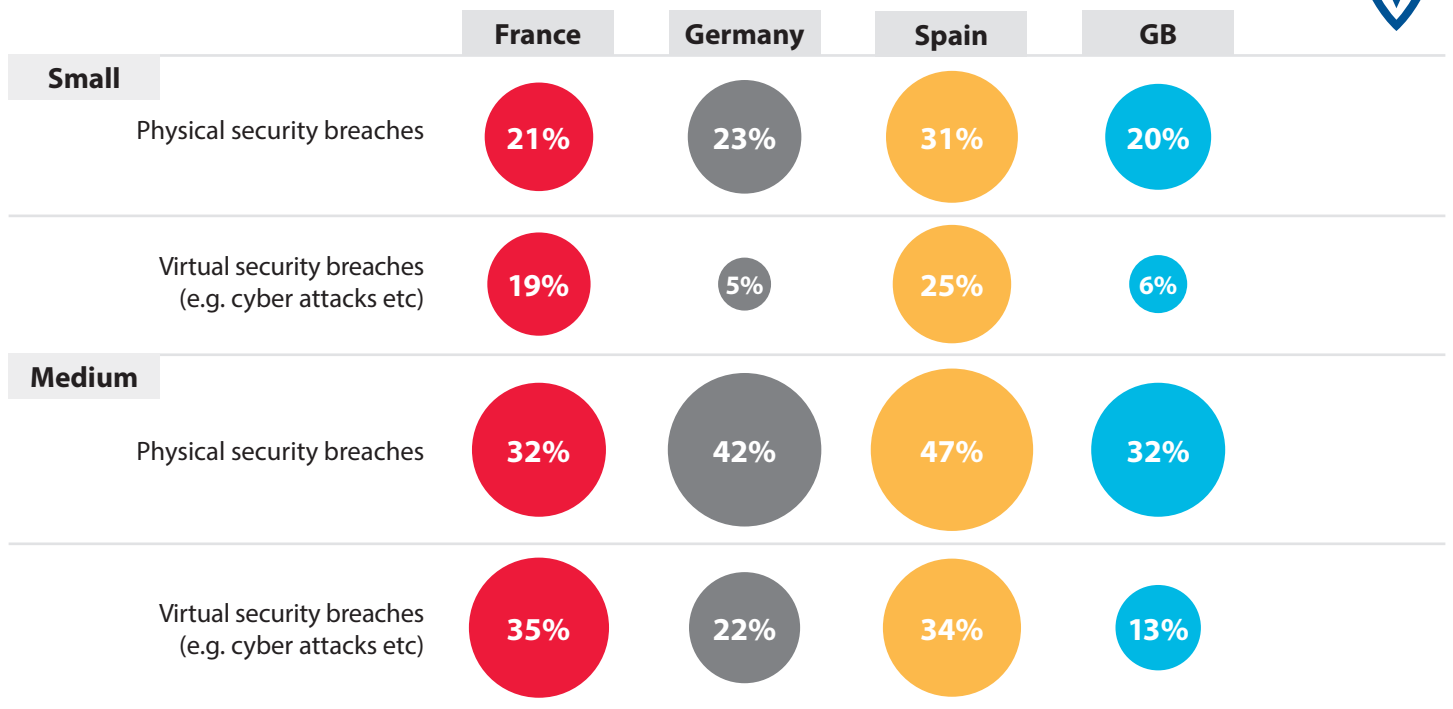
5 More than 1 in 3 businesses across France, Germany, Spain and Great Britain have suffered security breaches:

Significant numbers of businesses report loss, disruption and inconvenience from physical security breaches or cyber attacks. Furthermore, while cyber security is a major issue and one that gets the lion's share of attention, there are more physical breaches in security at businesses than cyber attacks.



Across the countries surveyed, **more than one in three (38%) of businesses** reported that they have suffered loss, disruption or inconvenience as a direct result of security breaches - whether physical breaches such as unauthorised access, theft, vandalism or sabotage, or cyber attacks.

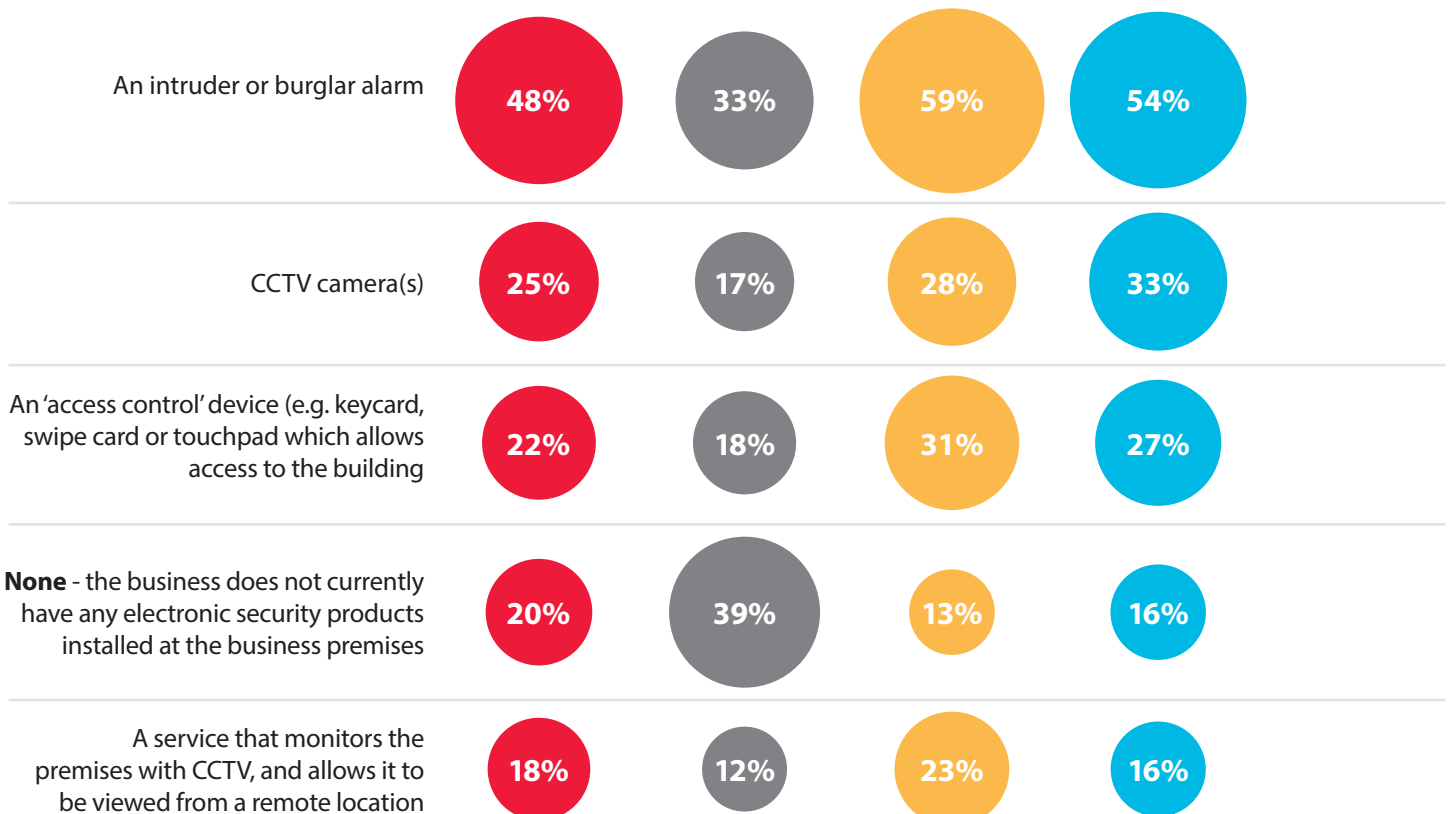
Average across 4 countries: 38%



With the exception of medium sized French businesses, **all report more physical breaches in security** at their premises than cyber attacks - in some cases by a factor of more than three to one.

6 Business premises are not adequately protected from breaches in security:

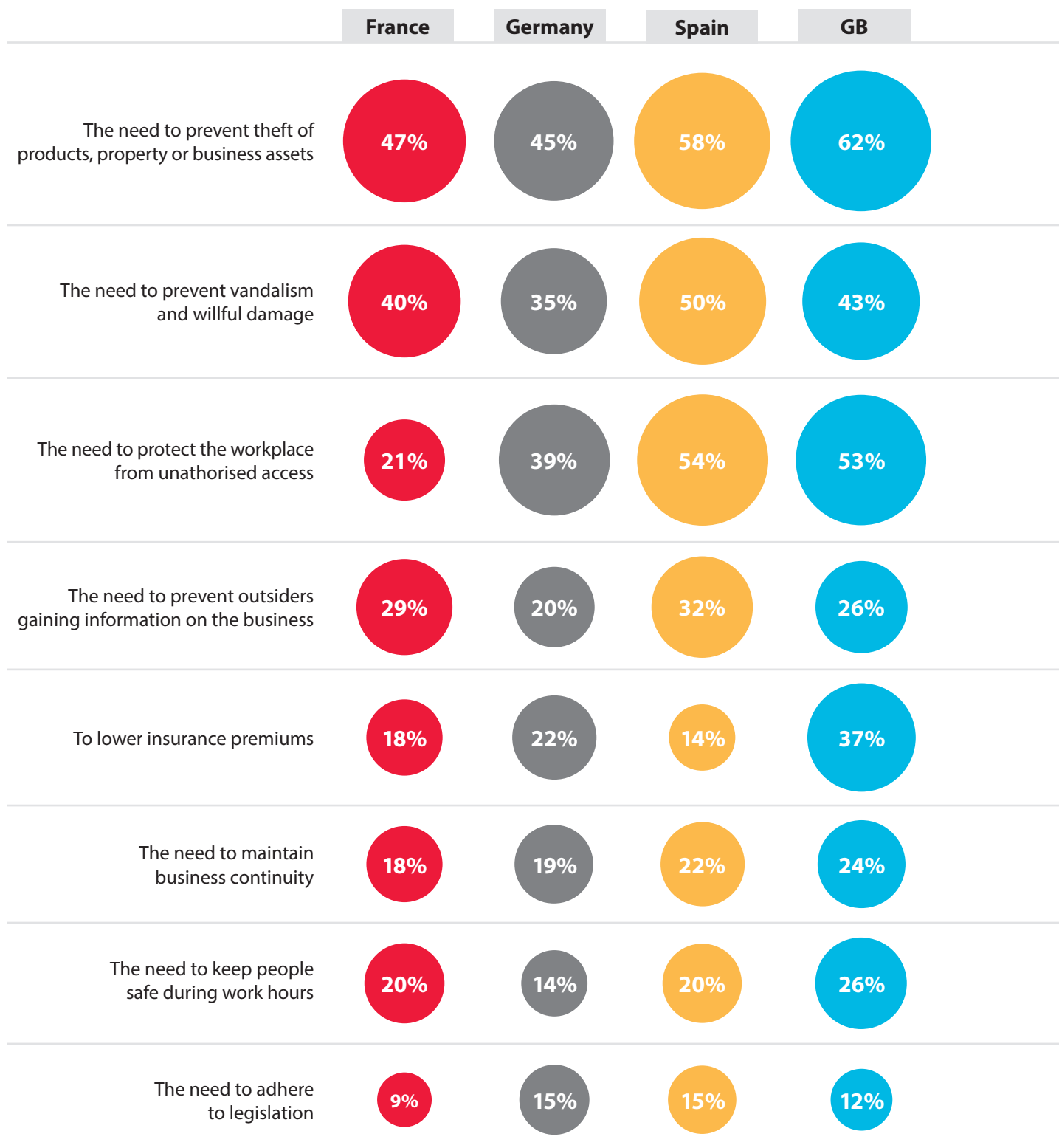
While the use of electronic security products differs by market, a large majority of businesses do not have access control, CCTV or remote monitoring. In fact less than half of the businesses across the four countries surveyed have an intruder or burglar alarm.





7 Fear of theft, vandalism and unauthorised access drive the installation of electronic security products in the workplace:

Pragmatic concerns lie behind the installation of electronic security products in the workplace. Other considerations such as duty of care, regulatory compliance, lowering insurance premiums and maintaining business continuity are lesser concerns.

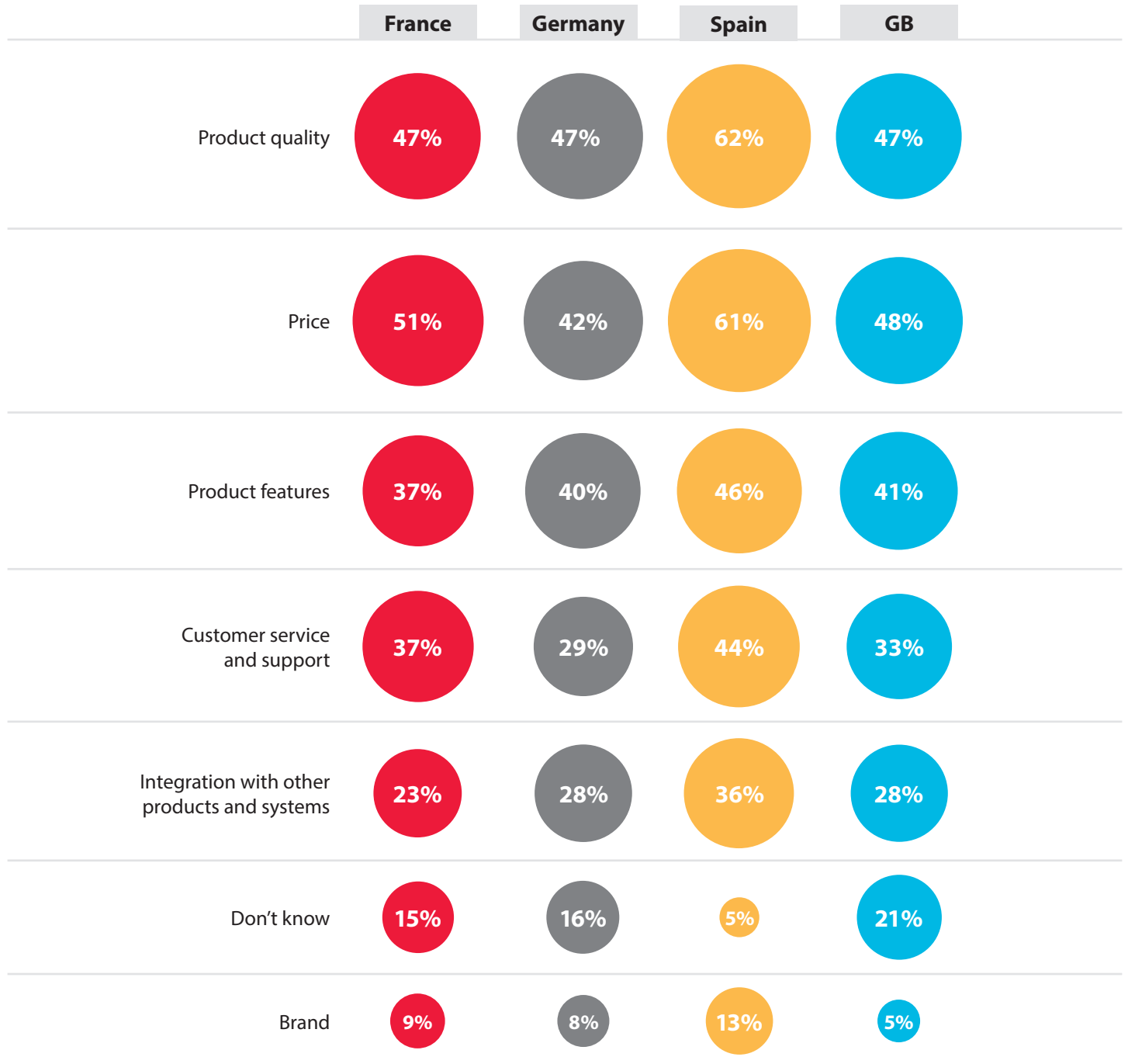




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Above anything, businesses look for quality, price and features when they purchase electronic security products:

Brand loyalty is a minor concern for businesses specifying and purchasing electronic security products. They value quality, price and features above customer service, integration and brand.





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Methodology

The 2015 Vanderbilt Security Barometer draws on research conducted by YouGov for Vanderbilt in April 2015. Fieldwork was undertaken between 7th - 15th April and the survey was carried out online. The figures have been weighted and are representative of business size, or all adults in each respective country (aged 18+). All figures, unless otherwise stated, are from YouGov Plc.

The sample size of 7,539 was comprised as follows:

- **France:** 261 senior decision makers in small and medium sized enterprises (businesses of up to 249 employees) and 1,025 adults
- **Germany:** 250 senior decision makers in small and medium sized enterprises (businesses of up to 249 employees) and 1,017 adults
- **Spain:** 276 senior decision makers in small and medium sized enterprises (businesses of up to 249 employees) and 1,008 adults
- **Sweden:** 1,020 adults (no suitable business sample was available to survey)
- **Great Britain:** 662 senior decision makers in small and medium sized enterprises (businesses of up to 249 employees) and 2,020 adults