asmag.com Security & IoT HIKVISION

READER SURVEY RESULTS

SUSTAINABILITY & THE SECURITY INDUSTRY

READER SURVEY

METHODOLOGY

Asmag.com surveyed its reader database of physical security professionals from Invitations to take the online survey were shared on social media (Linkedin, Twitter, Facebook), asmag.com website and sent via email.

After a review of the responses and data cleansing, a total of 254 respondents were included in the analysis.

***Note:*
1. Reported percentages might not add to 100% because of rounding.
2. To investigate potential disparities in market sentiments across regions, respondents were categorized into two general groups: Western (US, Europe and the Middle East) and Asian (Asia and Oceania) to streamline the analysis.

DEMOGRAPHICS

Business nature and profession in the industry

Regions

39% Americas
35% Asia
14% Europe
5% Middle East
3% Oceania
3% Africa

Verticals

Manufacturing/industrial parks	11%
Commercial buildings	11%
Retail	9%
Government/public safety	8%
Residential	8%
Smart/safe city	8%
Healthcare	8%
Construction/real estate	7%
Education	5%
Transportation	5%
Logistics	5%
Hospitality	5%
Financial institutions	5%
Oil and gas	4%
Others	1%

READER SURVEY

RESULTS

EXECUTIVE SUMMARY

• Both Western and Asian channel players are familiar with the general principles on a basic level. However, the survey shows the need (and the opportunity) for more market education and information.

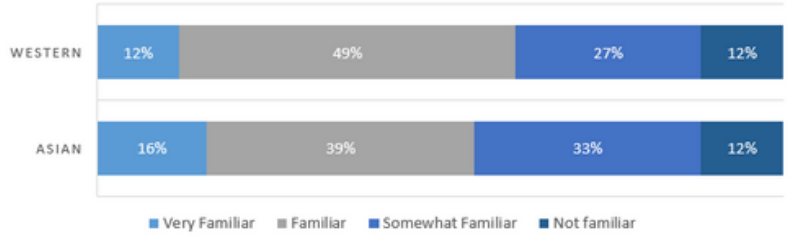
• While there is marked interest in green practices and technology, it is evident that practical factors such as device features, durability, brand and budgetary considerations take precedence in purchasing decisions.

• It would be important for manufacturers and brands to not only emphasize the sustainability aspect of the device/solution, but also effectively communicate their practical features and applications to users.

MARKET KNOWLEDGE AND SENTIMENT

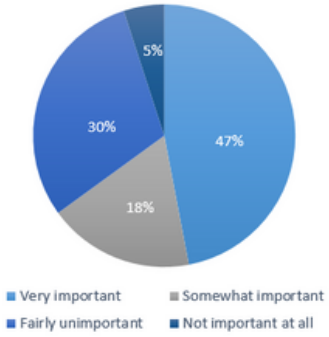
- How familiar are channel players with green and low carbon initiatives for the security industry?

	Western	Asian
Very familiar - "I have implemented the concepts in my business."	12%	16%
Familiar - "I understand the concept and basic details of how it works."	49%	39%
Somewhat familiar - "I am aware of it but don't know much."	27%	33%
Not familiar - "This is the first time I'm hearing about this."	12%	12%



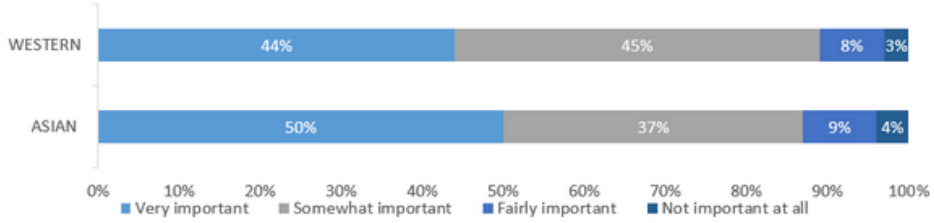
- How important are green and low carbon initiatives for you?

Very important	47%
Somewhat important	18%
Fairly unimportant	30%
Not important at all	5%



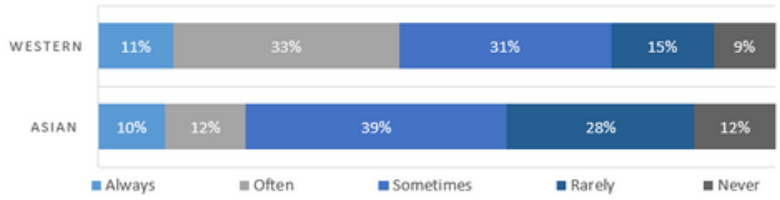
- How important is it for you to buy energy-saving/low-power consumption products to contribute to greener and low-carbon practices?

	Western	Asian
Very important	44%	50%
Somewhat important	45%	37%
Fairly important	8%	9%
Not important at all	3%	4%



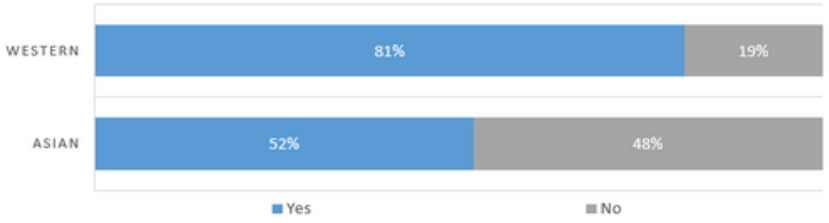
- How often are clients asking for green products and solutions in your projects?

	Western	Asian
Always	11%	10%
Often	33%	12%
Sometimes	31%	39%
Rarely	15%	28%
Never	9%	12%



- Have you ever used solar-powered security products?

	Western	Asian
Yes	81%	52%
No	19%	48%



What are the major green technologies in the market?

- Solar power cited as main green technology in the security market (27% of total comments)

- Smart energy management (15% of total comments)
  - Smart lighting system (38%)
  - IoT-enabled energy management for monitoring and optimizing energy consumption (27%)
  - Low power sensors (24%)

- Energy-efficient equipment (13% of total comments)
  - Low power or low energy consumption devices that can reduce overall energy consumption (70%)
  - Energy saving modes that would put the devices/system to sleep (24%)

- Sustainable storage - data transmission and storage (7% of total comments)
  - Wireless connection/less cabling for better power allocation and management (41%)
  - Virtualized computing via Cloud to help consolidate servers and reduce IT power and administration costs (29%)
  - Video compression to reduce hardware, space and power requirements (18%)
  - Storage - onboard or stored on edge to minimize centralized storage (12%)

While the focus of our inquiry centered on green technology, it is noteworthy that a significant portion (16% of total comments) revolved around the concept of sustainable manufacturing.

- Manufacturers follow policies for environment protection/pollution prevention (59%)
- Use of environmentally friendly materials during production with emphasis on sustainability and durability (23%)

View the Full Report Online

https://www.asmag.com/project/sustainability_and_the_security_industry/

- Comprehensive analysis of the survey results
- Explore Hikvision sustainable business solutions and innovations
- Discover how technology can boost energy efficiency of your security system

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RESULTS

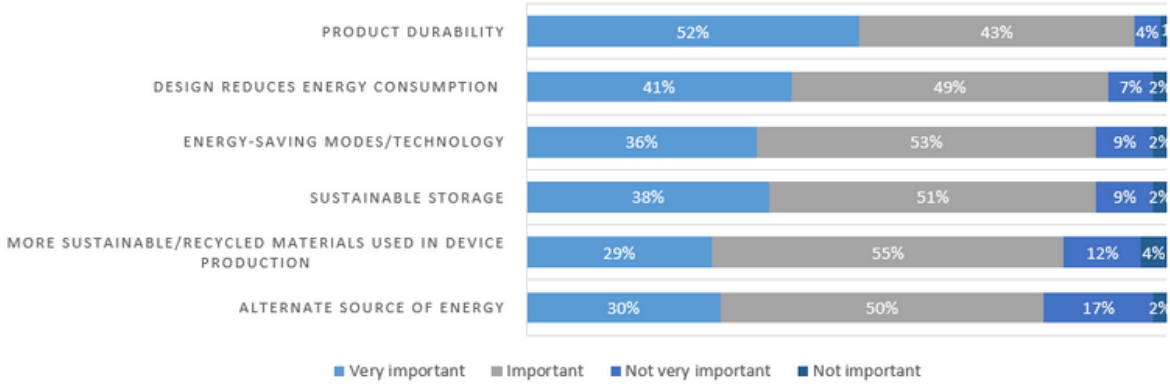
GREEN AND SUSTAINABLE SECURITY PROCUREMENT

- In purchasing decisions, how do green sustainability practices measure against other considerations?

Ranking	Key Considerations
1	Device design and features
2	Manufacturer/brand
3	Price
4	After-sales service/support
5	Green sustainability practices

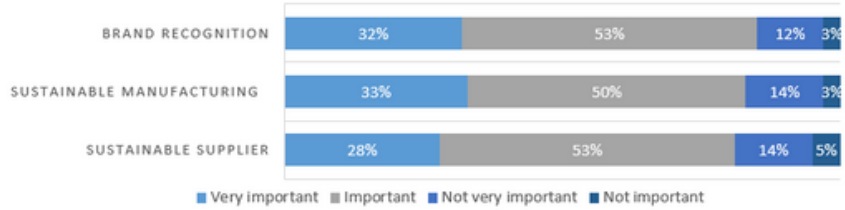
- When choosing device design, what matters most when making purchasing decisions?

Ranking	
1	Product durability - lifecycle perspective
2	Design reduces energy consumption (e.g., DVRs or cameras that use embedded SSD storage)
3	Sustainable storage (e.g., video compression to lower bandwidth and storage space)
3	Energy-saving modes/technology (e.g., low power mode or low-light CCTV to reduce supplementary lighting)
4	Alternate source of energy (e.g., solar-powered)
5	More sustainable/recycled materials used in device production



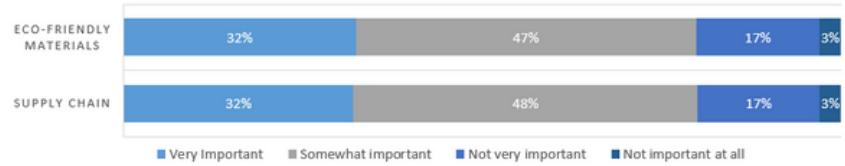
- When choosing manufacturers or brand names, what matters most when making purchasing decisions?

Ranking	
1	Brand recognition - eco-conscious and have industry green certifications
2	Sustainable manufacturing with energy saving and waste management best practices
3	Manufacturers only use sustainable suppliers that meet environmental standards



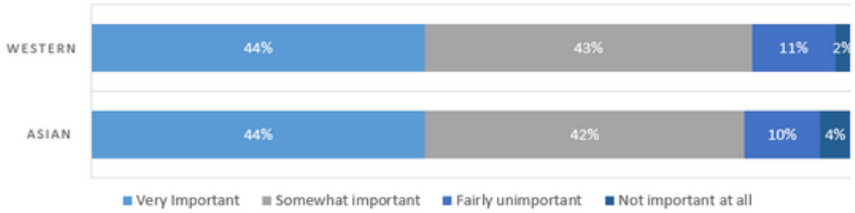
- In terms of packaging and delivery, what matters the most when making purchasing decisions?

Ranking		Very important	Important	Not very important	Not important
	Use of eco-friendly materials for packaging	32%	47%	17%	3%
	Supply chain to reduce carbon footprint (fuel emission in transportation)	32%	48%	17%	3%



- Will you prefer to buy products which adopt greener packaging materials?

	Western	Asian
Very important	44%	44%
Somewhat important	43%	42%
Fairly unimportant	11%	10%
Not important at all	2%	4%



To ensure a comprehensive survey, respondents were asked if any factors have been overlooked. Remarkably, the majority of the comments in this section circled back to practicalities as their focal point.

- Procurement priorities (47% of total comments)
  - Quality and performance (59%)
  - ROI and costs (41%)

- Technical support, service and compatibility (31% of total comments)
  - When it comes to compatibility (17%) , two aspects were considered: 1. how the device/solution will work with existing systems and 2. how the device abides with current environmental standards.
  - 14% are more focused on after-sales support and service for these devices.

Of note, two respondents specifically mentioned “Lead time :)” as an important factor to consider.

READER SURVEY

RESULTS

FUTURE OF GREEN AND LOW-CARBON PRACTICES IN SECURITY

- What can be challenges/barriers to adopting green and low carbon solutions in the security industry?

Ranking		Percentage
1	Not a priority for most channel players	18%
1	Initial costs and uncertainty about return on investment	18%
2	Lack of public awareness and education	17%
2	Lack of standardization & certifications (harder to evaluate/compare options)	17%
3	Limited supplier options	12%
4	Difficulties/hassles with following both security and environmental standards	10%
5	Difficulty to sell the benefits to stakeholders	8%

- How will the adoption of green and low carbon security practices evolve in the industry in the next few years?

Ranking		Percentage
1	**Manufacturers will increasingly use green practices to add value/differentiate themselves**	**22.9%**
2	Stricter government regulations to promote sustainability and adoption of green solutions	22.6%
2	Advancements in technology will make greener products less expensive and more accessible	22.6%
3	Sustainability will be ensured for global supply chain (whole lifecycle of products and services	17.1%
4	Carbon footprint data will be mandatory	9.8%
5	Not much difference as sustainability would still not be a priority	4.7%

- What additional support or resources is needed for the security industry to adopt green and low carbon practices?

Ranking		Percentage
1	**Clear industry-wide eco-labeling and standardization for users**	**34.4%**
2	More case studies and success stories to showcase benefits	32.1%
3	Financial incentives/payment models for businesses to implement green solutions	31.9%