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ACCESS CONTROL & LOCKDOWN SPECIAL REPORT

EXCLUSIVE RESEARCH

SURVEY: CAMPUSES HAVING MIXED SUCCESS WITH ACCESS CONTROL, LOCKDOWN

Demand for access control, locks, visitor management and other solutions is on the rise, but the ability to lockdown is still a challenge. *By Robin Hattersley*

As I crunched the raw data from this year's *Campus Safety* Access Control and Lockdown Survey, I encountered some very interesting contradictions.

On the one hand, compared to what was revealed in our 2019 Access Control and Lockdown Survey, this year, a lot more respondents say they've purchased equipment over the past two years and/or are considering buying more in the next two years. On the other hand, fewer say they can lockdown 100% of their campuses.

You would think that if more schools, universities and healthcare facilities have purchased more access control and lockdown solutions that they would report improvement in their lockdown capabilities, right?

I can't explain this contradiction with the data I have at my disposal. One possibility, however, is the increase in purchasing and the due diligence that is required for this type of activity has led our survey takers to become more aware of their lockdown vulnerabilities. Most of us have investigated an issue, only to find out that the problem is much worse than we had previously thought.

This contradiction is just one of the many interesting data points revealed in the results from the 2021 *Campus Safety* Access Control and Lockdown Survey. Read on for the specifics.

Campuses Continue to Acquire More Systems, Equipment

As stated previously, a lot of purchasing appears to have been going on in the educational and healthcare sectors over the past two years. Eighty-four percent of respondents say they've purchased card and/or biometric access control systems. That's 22 percentage points more than what was revealed in our 2019 survey on this topic. This year, 45% say they are considering adding more of these systems in the next two years. That's 8% more than two years ago. *(See chart below.)*

Purchasing of locks and/or door hardware has also been strong, with 78% of respondents saying they've acquired this type of equipment over the past two years. Additionally, demand for these products only appears to be increasing, with 45% of survey takers saying they are considering buying locks and/or door hardware over the next two years. That's 10 points more than what respondents

In the past two years, has your campus/district/institution adopted new or upgraded any of the following? If not, are you considering doing so in the near future?

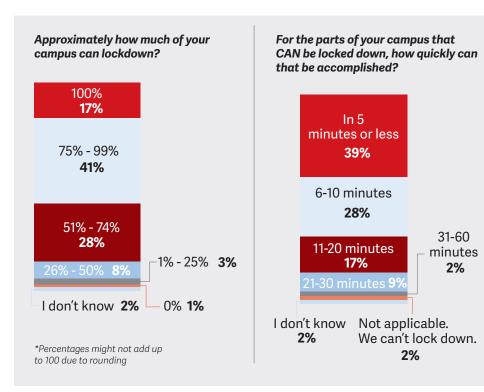|	Yes	Yes — and we are considering adding more within the next 2 years	No — but we are considering doing so within the next 2 years	No
Card and/or biometric access control system(s)	49%	35%	10%	6%
Locks and/or door hardware	44%	34%	11%	10%
Visitor management system(s)	41%	32%	16%	11%
NFC/BLE mobile phone access control	31%	31%	14%	21%
Fences	41%	26%	12%	21%
Secure front entrance vestibule(s)	46%	28%	10%	16%
Window safety and/or security solution(s)	38%	31%	13%	18%
Lockdown/shelter-in-place policies and procedures	52%	31%	11%	6%

said in 2019.

Demand for visitor management is also extremely strong, particularly in schools. Eighty-three percent say they purchased visitor management systems over the past two years, with 29% saying they are considering buying more of these systems in the next two years. Healthcare facility respondents have also been very active in acquiring systems that manage guests (75%), with more than half (59%) saying they are considering purchasing more of this type of solution.
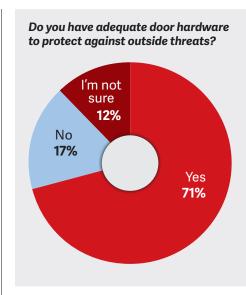
Adoption of security front entrance vestibules has dramatically increased as well, with 74% of respondents saying they've implemented or upgraded this solution over the past two years.

NFC/BLE mobile phone access control was added to this question this year, and overall, there have been a lot of purchases of this type of solution recently. Nearly two out of three (62%) respondents overall have purchased NFC/BLE solutions over the past two years with nearly half (45%) saying they are considering buying more.

Purchases of fences have also increased, from 36% in 2019 to 67% in this year's survey. The same can be said for window safety and/or security solutions. Two years ago, 33% of respondents said they purchased these solutions over the past two years, while in 2021, 69% said they've recently made purchases.

Even the adoption of lockdown/shelter-in-place policies and procedures, which was very strong in 2019 (81%) increased to 83% this year overall.

Do you have adequate door hardware to protect against outside threats?

I'm not sure **12%**

No **17%**

Yes **71%**

Approximately how much of your campus can lockdown?

100% **17%**

75% - 99% **41%**

51% - 74% **28%**

26% - 50% **8%**

1% - 25% **3%**

I don't know **2%**

0% **1%**

Percentages might not add up to 100 due to rounding

For the parts of your campus that CAN be locked down, how quickly can that be accomplished?

In 5 minutes or less **39%**

6-10 minutes **28%**

11-20 minutes **17%**

21-30 minutes **9%**

31-60 minutes **2%**

I don't know **2%**

Not applicable. We can't lock down. **2%**

Fewer Respondents Can Lockdown All of Their Buildings

When an emergency happens, it's critical that a facility be able to lockdown and do so quickly. Unfortunately, this year's survey found that there has been quite a bit of backsliding on this front. (See charts on page 4.)
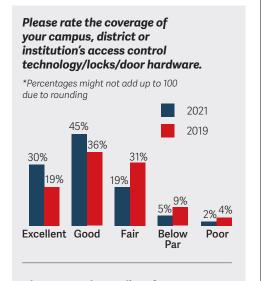
Compared to 2019 when we last asked our readers how much of their campus can lockdown, there has been a significant drop in the percentage of respondents who now say 100% — from 30% two years ago to 17% now. The good news, however, is that the vast majority of respondents say they can lockdown more than half of their campus — 86% this year compared to 79% in 2019.

Not surprisingly, K-12 schools/school districts still have the greatest ability to lockdown. Seventy-nine percent say they can lockdown 75-100% of their campus. Unfortunately, that's an 11% decrease from two years ago when 90% of K-12 respondents said they could lock down 75-100% of their buildings.
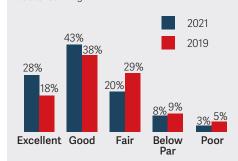
When we asked those respondents who can lockdown how quickly they can do so, only 39% said in 5 minutes or less, compared to 71% two years ago. More respondents, however, now say they can lockdown in 6-10 minutes (28% compared to 15% in 2019).

K-12 campuses have the fastest

Please rate the coverage of your campus, district or institution's access control technology/locks/door hardware.

*Percentages might not add up to 100 due to rounding

Legend: ■ 2021 ■ 2019

	Excellent	Good	Fair	Below Par	Poor
2021	30%	45%	19%	5%	2%
2019	19%	36%	31%	9%	4%

Please rate the quality of your campus, district or institution's access control technology/locks/door hardware.

*Percentages might not add up to 100 due to rounding

Legend: ■ 2021 ■ 2019

	Excellent	Good	Fair	Below Par	Poor
2021	28%	43%	20%	8%	3%
2019	18%	38%	29%	9%	5%

When you go into lockdown, how confident are you that you can fully account for everyone in your building(s), including visitors, volunteers and contractors?

	All	K-12	Higher Ed	Healthcare
Really confident	29%	36%	28%	30%
Moderately confident	50%	51%	46%	53%
Slightly confident	14%	10%	16%	12%
Not confident at all	7%	4%	10%	6%

*Percentages might not add up to 100 due to rounding

lockdown response times. Eight in 10 respondents say they can lockdown their campuses in 10 minutes or less.

Door Hardware, Visitor Tracking Get High Marks

Although most threats to a school, college or hospital come from someone who is already on campus, attacks coming from off-campus do pose a problem, as the victims of the Sandy Hook and Parkland mass shootings will attest. Overall, more than seven out of 10 of our survey takers believe they have adequate door hardware to protect against outside threats. Hospitals are the most confident (80%), while K-12 and college respondents are less confident (70% and 69% respectively). (See pie chart on page 4.)

After a lockdown is implemented, it's critical that campuses account for everyone in the building, including visitors, volunteers and contractors. According to this year's survey, nearly eight in 10 (79%) respondents are really confident or moderately confident they can do so. (See chart on page 5.)

Due to the responsibilities of K-12 schools for children, as well as the duty of care expected of hospitals for their patients, it's not surprising that both K-12 and healthcare respondents had higher degrees of confidence in accounting for everyone in their buildings during a lockdown — 87% and 83% respectively said they are "really" or "moderately" confident. That said, colleges and universities

PHYSICAL ACCESS CONTROL: Aside from cost/budget issues, how significant have been the following challenges that you may have faced during the past two years? *Percentages might not add up to 100 due to rounding*

	Extremely challenging	Very challenging	Somewhat challenging	Marginally challenging	Little or no challenge	I don't know
Our campus layout is open, so it's very difficult to lockdown our campus or control access	15%	24%	31%	14%	15%	2%
Our students, faculty and/or staff are required to carry too many credentials or keys	5%	18%	22%	24%	29%	1%
Lack of metal detection, or our detectors need to be upgraded	10%	20%	23%	21%	23%	4%
Lack of a visitor management system, or the system we have needs to be upgraded	10%	17%	25%	23%	23%	3%
Design and/or placement of our windows makes us vulnerable to safety and security incidents	9%	20%	27%	22%	20%	2%
Tracking and managing keys	14%	19%	28%	25%	14%	2%

weren't too far behind their healthcare and K-12 brethren. Nearly three out of four said they were "really" or "moderately" confident.

Campuses Happier with Coverage, Quality of Access, Lockdown Solutions
Compared to two years ago when we asked our readers how satisfied they were with the coverage of their access control, locks and door hardware, we've seen a 20-point increase in satisfaction overall, with 75% rating their coverage as excellent or good, compared to only 55% in 2019. Currently, our healthcare respondents are slightly less enthusiastic about their coverage compared to K-12 and higher ed survey takers. About one in four (26%) healthcare respondents rate their coverage as excellent, compared to 28% of school and 32% of college participants. (See chart on page 5.)

Survey participants are also more satisfied with the quality of their access control systems, locks and door hardware today than they were in 2019. Nearly three in five (71%) rate it as excellent or good now, compared to only 56% two years ago. Higher ed and K-12 school and district respondents were the most likely to give an excellent rating (30% and 29%, respectively) compared to hospitals (26%).

Compared to our 2019 survey results, the percentage of campuses experiencing extremely or very challenging issues associated with physical access control has remained remarkably constant. "Campus layout," once again tops the list at 39%, while "tracking and managing keys" comes in second at 33%. "Lack of metal detection or our detectors need to be upgraded" comes in third on this list. (See chart on page 6.)

The percentage of campuses experiencing extremely challenging or very challenging issues associated with their policies and personnel has also remained

Has your campus/district/institution experienced any of the following problems with its locks/door hardware in the past two years?

	Yes	No	I don't know
Our locks and door hardware have not been properly maintained	44%	51%	6%
Our locks and door hardware are not properly configured for safety and security	36%	55%	10%
Doors that should have locks on them do not	37%	56%	7%
Students, staff, administrators and teachers are not trained on our access control policies or don't follow our policies (regarding things like propping doors open, for example)	48%	45%	7%

*Percentages might not add up to 100 due to rounding

remarkably constant when compared to the survey from two years ago. The most significant change? Six percent more respondents say their issues with IT department buy-in are extremely challenging or very challenging — up from 18% in 2019 to 24% this year.

That being said "Policies supporting our access control system(s) don't exist or the ones we have need to be upgraded" continues to be the biggest thorn in the side of campus security professionals. A third say this issue is extremely or very challenging for them (32% said the same thing in 2019). (See chart below.)

Additionally, the maintenance and configuration of locks and door hardware continues to pose challenges to this year's survey participants. There is very little change in the answers to both of these questions this year compared to 2019 — 44% this year for maintenance compared to 42% two years ago, and 36% now compared to 37% previously.

There has been significant improvement, however, in training. Although nearly half (48%) of this year's respondents say "Students, staff, administrators and teachers are not trained on our access control policies or don't follow our policies," that's way better than the 61% in 2019.

The same can't be said for doors not having locks on them that should. More than a third (37%) of this year's respondents say that "Doors that should have

ACCESS CONTROL, LOCK and LOCKDOWN POLICY & PERSONNEL ISSUES: Aside from cost/budget issues, how significant have been the following challenges that you may have faced during the past two years?

Percentages might not add up to 100 due to rounding

	Extremely challenging	Very challenging	Somewhat challenging	Marginally challenging	Little or no challenge	I don't know
Policies supporting our access control system(s) don't exist or the ones we have need to be upgraded	11%	22%	27%	17%	22%	2%
We don't have enough staff to operate our access control system(s) and/or locks	9%	19%	28%	20%	22%	2%
Staff don't know how to effectively manage our access control system(s)	9%	20%	24%	20%	26%	2%
Support/buy-in from students, faculty and/or staff is lagging	8%	20%	25%	23%	23%	2%
Support/buy-in from management/administration is lagging	9%	19%	25%	20%	25%	3%
IT department buy-in/support and cooperation lagging	10%	14%	24%	24%	25%	3%

locks on them do not." That's up from 32% two years ago. (See chart on page 7.)

When it comes to access control technology, more respondents this year than in 2019 say they are experiencing some challenges, although those issues are only marginally or somewhat challenging, rather than very or extremely challenging. When you compare the "Little or no challenge" columns from this survey and the previous survey, you see that things like finding a good integrator, having enough expertise or maintenance are posing more problems for our survey takers than two years ago. (See chart below.)

The issuance of ID cards poses challenges for many of our respondents.

A significant portion of higher education and healthcare participants say they have a slow ID card issuance process (40% and 34% respectively); printer reli-

ACCESS CONTROL TECHNOLOGY: Aside from cost/budget issues, how significant have been the following challenges that you may have faced during the past two years? *Percentages might not add up to 100 due to rounding*

	Extremely challenging	Very challenging	Somewhat challenging	Marginally challenging	Little or no challenge - 2021	Little or no challenge - 2019	I don't know
We don't have a card access control or biometric system installed on our campus	10%	13%	22%	16%	38%	51%	2%
We can't find a good integrator to install our equipment	5%	19%	22%	20%	30%	52%	5%
I want to install more access control technology, but I don't have the expertise to know where to start	6%	12%	25%	21%	30%	57%	5%
Maintenance of card access systems	6%	16%	28%	20%	28%	43%	3%
Older access system(s) can't integrate/ interoperate with new access control systems	8%	17%	24%	21%	26%	37%	4%
Our access system(s) isn't integrated with our other public safety systems (e.g. video surveillance, intrusion, fire, etc.)	12%	14%	25%	23%	22%	25%	4%
Access control software bugs and updates	7%	16%	23%	23%	26%	41%	5%

ability/maintenance challenges (36% and 46%); smart card management problems (46% and 42%); and the inability to issue cards outside of the card office (38%). Most of those challenges don't impact K-12 campuses or districts as much. (See chart on the right.)

Thank You Survey Participants!

Campus Safety thanks the more than 400 school, university and healthcare protection professionals who participated in this research project. We truly appreciate your input.

What challenges do you face with your ID card issuance process today?

Slow card issuance process	**34%**
Printer reliability/maintenance	**38%**
Smart card management	**40%**
Inability to issue cards outside of card office	**35%**
Issuing to remote locations	**13%**
Not applicable	**11%**